

Nortel Workforce Management

Scorecards Configuration and Maintenance Guide

NN44480-502

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New in this release

The following sections detail what's new in *Scorecards Configuration and Maintenance Guide* (NN44480-502) for Workforce Management Release 7.0.

- "Features" (page 7)

Features

This is the first release of this document.

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Introduction

The *Scorecards Configuration and Maintenance Guide* describes how to use the Scorecards application to support your organization's performance management goals.

Scorecards is a module within the Workforce Optimization suite and, depending on licensing, is integrated with:

- the Workforce Management Adherence, Forecast & Scheduling systems
- the eLearning system
- Nortel Quality Monitoring

The document contains the following chapters:

- "User guide content overview" (page 9)
- "Related Documentation" (page 11)
- "Intended Audience for this Guide" (page 11)
- "Standard Conventions" (page 11)

User guide content overview

The *Scorecards Configuration and Maintenance Guide* provides the following information:

Chapter Title	Description
Scorecards Overview, Workflow Setup, and Navigation	Provides an overview of Scorecards and its components, as well as descriptions of how to: • launch Scorecards • navigate in Scorecards
Working with Roles and Privileges	Describes how to manage roles and privileges for Scorecards users, in order maintain security and control user access.

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Chapter Title	Description
Configuring Organizations, People, and Notification Alerts	Describes how to: • set up organizations • add users • configure roles and access rights for users • import and export user information • configure the KPI Out Of Range notification alert (Advanced Scorecards)
Working with Scorecards Sources	Describes how to manage: • Data Sources • Source Measures • Source Systems • Source Codes • Source Mapping • Mapping to Forecasting & Scheduling
Configuring and Administering Scorecards	Describes how to: • Set up Scorecards • Create and Edit KPI Settings (Basic Scorecards) • Create and Edit KPI Settings (Advanced Scorecards) • Define Objectives • Assign/Edit KPI Weights within Objectives • Configure Scorecards Settings • Configure General System Settings
Scorecards Privileges	Describes all Scorecards related roles and privileges.
Working with the Integration Server	Describes accessing: • The Integration Server • Scorecards Integration Packages • Timer Settings
Integrating and Synchronizing Scorecards with other Systems	Describes how to: • Configure Drill through to Nortel Contact Viewer • Configure Drill through to QM • Integration with eLearning
Troubleshooting and Common Problems	Describes troubleshooting issues

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Related Documentation

Scorecards is integrated within the Workforce Optimization/Workforce Management suite. The suite can also be integrated with Forecasting and Scheduling, eLearning, Quality Monitoring, and so on, depending on licensing.

While this guide describes Workforce Optimization tasks that must be completed by a Scorecards user to allow the user to work with Scorecards effectively (for example, setting roles and privileges, updating user profiles, configuring general system settings related to Scorecards), you may need to refer to detailed descriptions of processes used by the rest of the suite.

These detailed descriptions can be found in the appropriate documentation developed for the suite. See:

- *Workforce Management Administration Guide* - NN44480-600
- *Workforce Management Schedulers' Guide* - NN44480-114
- *Workforce Optimization Suite Installation Guide* - (Author: required NN)
- *Scorecards Adapters Guide* - NN44480-605
- *eLearning Administration Guide* - NN44480-119
- *User Synchronization Tool Guide* - NN44480-506

Intended Audience for this Guide

This guide is intended for use by Scorecards administrators. It guides you through the steps to configure and manage the software.

Standard Conventions

The Standard Conventions table highlights conventions used to describe user interaction, as well as special notations.

Area	Description
Menu Items	Menu items are highlighted in bold as in the following example: From the menu, choose **File > Preferences > Options.**
Document Names	Other documents are referred to using italics. For example: Refer to the *Quality Monitoring 7.7 Installation Guide* for more information.
Buttons, Functions, and Dialog Box and Window Names	Specific button or function names are highlighted in bold. The following example shows how a button and dialog name are referred to in the documentation: Click **OK**, and then choose the **Restore Database** dialog box.
User Variables	When the user is expected to type a value, the name of the variable to be replaced is surrounded by <> . The following are examples: **<Your ER Server Name>** The notation **<Your ER Server Name>** refers to the name of your Enterprise Reporting server. When you see this notation, replace it with the actual name of your Enterprise Reporting server.

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Customer support

This section explains how to get help for Nortel products and services.

Finding the latest updates on the Nortel Web site

The content of this documentation was current at the time the product was released. To check for updates to the latest documentation, go to www.nortel.com/documentation.

Getting help from the Nortel Web site

The best way to get technical support for Nortel products is from the Nortel Technical Support web site:

www.nortel.com

This site provides quick access to software, documentation, bulletins, and tools to address issues with Nortel products.

- download software, documentation, and product bulletins
- search the Technical Support web site and the Nortel Knowledge Base for answers to technical issues
- sign up for automatic notification of new software and documentation for Nortel equipment
- open and manage technical support cases

Getting help over the phone from a Nortel Solutions Center

If you do not find the information you require on the Nortel Technical Support web site, and have a Nortel support contract, you can also get help over the phone from a Nortel Solutions Center.

In North America, call 1-800-4Nortel (1-800-466-7835). Outside North America, go to the following web site to obtain the phone number for your region:

www.nortel.com/callus

Getting help from a specialist by using an Express Routing Code

To access some Nortel Technical Solutions Centers, you can use an Express Routing Code (ERC) to quickly route your call to a specialist in your Nortel product or service. To locate the ERC for your product or service, go to:

www.nortel.com/erc

Getting help through a Nortel distributor or reseller

If you purchased a service contract for your Nortel product from a distributor or authorized reseller, contact the technical support staff for that distributor or reseller.

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Scorecards Overview, Workflow Setup, and Navigation

This chapter provides an overview of the Scorecards application, its initial setup workflow, as well as a description of how to launch and navigate in Scorecards.

This chapter contains the following topics:

- "About Scorecards" (page 13)
- "Launching Scorecards" (page 19)
- "Navigating in Scorecards" (page 20)
- "Scorecards Configuration Settings" (page 22)

About Scorecards

Scorecards is an enterprise-wide strategic measurement and management application that can help measure the productivity and efficiency of your company, its business units, and/or individuals within the business units. A scorecard is a set of performance scores based on input from several sources, which may be used to measure progress toward goals set by your company. Scorecards are generated for organizations or individuals, and are based on their role, whether agent, manager, or administrator.

The Scorecards application collects metric data from multiple sources and stores the data as ‘Source Measures.’ Source Measures are used to create ‘Key Performance Indicators’ (KPIs). KPIs are displayed on individual, organization scorecards, grouped under Objectives that communicate why the KPIs are important. KPIs provide a measure of the progress individuals and organizations are making towards meeting the Objectives that the scorecard is set to measure.

Scorecards display KPIs specific to the organization and can be viewed when specific permissions are applied. An Agent may have different KPIs and Objectives from a Manager and a Manager in one business unit may have different KPIs from a Manager in another business unit.

Scorecard licensing options include Basic Scorecards, Advanced Scorecards, and KPI design.

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See:

- "Why Use Scorecards?" (page 14)
- "Who Uses Scorecards?" (page 14)
- "General Scorecards License Descriptions" (page 15)
- "Key Components of Information Generated by Scorecards" (page 17)
- "Scorecards Initial Setup Workflow" (page 18)
- "Launching Scorecards" (page 19)
- "Navigating in Scorecards" (page 20)
- "Scorecards Configuration Settings" (page 22)

Why Use Scorecards?

Scorecards can provide information to all levels of staff and management to help improve the efficiency and productivity of the company contact center. When a contact center is working at high performance levels, the company benefits by maximizing customer loyalty and profitability.

The Scorecards application is designed to drive bottom line improvement by increasing the value of the business relationships through the effectiveness of employees. Scorecards can help you:

- **Manage Resources Effectively.** Scorecards can help you identify the costs incurred with selling, supporting and delivering products to customers and determine the resources needed to support higher or lower levels of sales, service, or product delivery. Scorecards incorporates employee and customer effectiveness to provide a complete picture of enterprise performance.
- **Manage Skills.** Scorecards can help you understand the cost, effectiveness and return on investment of specific training programs. It can also help you identify critical skill gaps effecting growth and service quality.
- **Build Employee Relationships.** Scorecards can help you identify critical processes, skill gaps, and management practices that increase employee turnover.
- **Identify and Manage Risks.** Scorecards can help you reduce customer and employee turnover by profiling and identifying high risk customers, employees, and business practices.

Who Uses Scorecards?

Scorecards can be used by virtually every type of user:

- **Administrators** can configure and maintain the Scorecards setup, which includes identifying the source measures and systems for Scorecards (the data used to calculate KPIs for individuals and organizations).

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Administrators may also access the functionality used by Supervisors and Managers.

- **Supervisors and Managers** can use scorecards to check on the progress of employees or organizations, and can compare histories and single out groups or individuals for commendation or coaching. In Advanced Scorecards, supervisors can identify positive and negative trends, and alter organizational goals to meet the changing needs of a successful business.
- **Agents** can access reports on their individual progress toward the goals set for them by managers or administrators. Advanced Scorecards can be configured to allow Agents to see how they compare to their peers.

General Scorecards License Descriptions

The Scorecards application is available in three different license levels:

Basic Scorecards	Basic Scorecards is designed for companies who would like to get up and running quickly to immediately start improving overall contact center productivity and management efficiency. Basic Scorecards gives you a clear, easy to use snapshot of your operations, teams, and individual agents so managers and supervisors can focus on improving performance. In general, Basic Scorecards provides: • a well-rounded, comprehensive package of KPIs for ACDs, Performance, Workforce Management, and Quality • limited performance management functionality • a limited ability to change KPI settings
Advanced Scorecards	Advanced Scorecards is designed for companies who want to personalize and customize the KPIs they track to include broader business goals or develop integrations with additional data sources. In general, Advanced Scorecards includes: • the same well-rounded, comprehensive package of KPIs as in Basic Scorecards • all the functionality of Basic Scorecards • the ability to change most KPI settings, except the formula • the ability to create, edit, and view Scorecards Notes and Assessments, and the alerts related to them, that accompany each Scorecards KPI • Scorecards alerts triggered by Scorecards Notes and Assessments • the KPI Out of Range Alert Rule capability • the use of the Ad Hoc Reports feature

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	• the ability to use custom adapters feeding the same KPI with information from other vendors, but using the same source system types
KPI Design	KPI Design builds upon the functionality of Advanced Scorecards and adds in the ability to define additional data sources types, source measures, KPIs, and to connect custom adapters from these additional data sources.

Licensing Details for Scorecards Administrators

Function / Feature	Basic Scorecards	Advanced Scorecards	KPI Design License
Working with KPIs			
Creating KPIs	Not available	Not Available	Can create KPIs using all parameters.
Editing KPIs	Can only edit the following parameters: • Name • Description • Apply to Sub-orgs • Precision • Effectivity Dates	Can edit ALL parameters except the following: • Variance to Planned • Variance Type • Enabled for Goal Reduction • Periodicities • Formula • Display Format	Can edit all parameters (unless KPI data has been received).
Exporting KPIs	Yes	Yes	Yes
Importing KPIs	Yes	Yes	Yes
Copying KPIs	Yes	Yes	Yes
Deleting KPIs	Yes	Yes	Yes
Purging KPIs	Yes	Yes	Yes
Working with Objectives			
Creating & Editing Objectives	Yes	Yes	Yes
Editing KPI Weights for Objectives	Yes	Yes	Yes
Copying/Deleting objectives	Yes	Yes	Yes
Working with KPI Goals			
Editing KPI Goals	No	Yes	Yes

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Function / Feature	Basic Scorecards	Advanced Scorecards	KPI Design License
Editing KPI Goal Values	No	Yes	Yes
Making Effective date changes	No	Yes	Yes
Working with Goal Adjustments & Reductions			
Creating & Editing Goal Adjustments and Reductions	No	Yes	Yes
Working with the KPI Out of Range Alert Rule			
Creating and configuring KPI Out of Range Alert Rules	No	Yes	Yes

Key Components of Information Generated by Scorecards

Once your Scorecards application has been installed and configured according to your organization's requirements, the application generates performance indicators - KPIs that are grouped within objectives - that measure the progress individuals and organizations are making towards meeting the your organization's objectives.

KPIs

Key Performance Indicators, or KPIs, are metrics used to report on the performance of individuals or groups of individuals, for example, Average Handle Time for calls. KPIs are the building blocks of scorecards and were established by application administrators. KPIs are scored to provide a numeric means to measure progress toward meeting an organization's strategic objectives. In Advanced Scorecards, KPI goals and objectives may be modified either temporarily or permanently.

Each KPI has a formula that is used to calculate the KPI's actual result. The formula defines which source measures are the building stones of the KPI and which mathematical operations should be applied to them. Source measures are extracted from external source system types such as automatic call distributors (ACDs), and Workforce Management systems (WFMS).

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When employees log on, they see a scorecard with KPIs for previous days. The KPIs that they are permitted to see are based on their role. Each role in the system has a pre configured set of privileges that determine what actions employees can do on the system, what columns in the scorecard are accessible or visible, and what scorecards are available for them.

Objectives

Objectives consist of one or more KPIs, which measure various parts of a common desirable goal, such as adherence to schedule, or increased sales revenue. “Deliver Outstanding Customer Service” and “Maximize Productivity” are examples of Objectives for a scorecard. Objectives should always be worded to reflect the language and priorities of your business.

Objectives should map to your organization’s strategic objectives. Objectives include one or more KPIs that measure performance in support of the objective. Each objective may be assigned a ‘perspective’ to reflect a ‘Balanced Scorecard’ practice. If your organization is not using a ‘Balanced Scorecard’ methodology this control can be ignored.

Scorecards are based on objectives and measures. In Advanced Scorecards, the organization defines their strategic objectives. The KPIs that they should monitor are those that support the strategic objectives. In Advanced Scorecards, you can define objectives and determine which KPIs support each objective. These can be adjusted by periodicity.

Scorecards Initial Setup Workflow

When Scorecards is initially installed, numerous settings, adapters, and sources must be set up and configured. This section contains the workflow order for these tasks, and a description of each step.

ATTENTION

Scorecards initial installations are performed by trained Application Consultants. Please do not attempt to entirely configure your Scorecards application without first contacting us.

Step	Action
1	Setup Integration adapters: a. enable and schedule the Data Warehouse Sync adapter b. enable and schedule adapters that Import Source Measure data c. enable and schedule the Calc engine adapter When the Integration Server is installed, all available adapters are also installed, but are not added to the system configuration.

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For more information about integration servers in this guide, see: "Working with Integration Servers" (page 133)

For detailed instructions on configuring these and other adapters, please refer to the *Scorecards Adapters Guide* (NN44480-605).

2 Configure Scorecards Sources

a. Create new source measures (if needed). You can create these on the Source Measures tab of the System module. For details, see "Managing Source Measures" (page 61)

b. Create source systems (if needed). You can create these on the Source Systems tab within the System module. For details, see "Managing Source Systems" (page 66)

c. Map F&S queues to organization (if needed). For details, see "Forecasting and Scheduling Queue Mapping" (page 76)

3 Setup the Scorecards pages: See "Managing Scorecards Setup" (page 81)

a. Create/Import KPIs. See "About Creating or Editing KPI Settings" (page 86)and "Importing KPIs" (page 84)

b. Create Objectives, set up KPI weights. (in advanced Scorecards only) See "Managing Objectives" (page 102)

c. Set goals, and adjust them, if needed. (in Advanced Scorecards only) See "Editing KPI Goals (Advanced Scorecards)" (page 106)

d. Configure the Scorecards Settings page per organization. See "Configuring Scorecards Settings" (page 112)

4 Run adapters in the order in which they were set up in step 1.

5 Verify that you see Scorecards data in the UI. Configure advanced features, such as Integrating with eLearning, Speech Analytics, or Drill Through to Adherence. See Appendix "Integrating and Synchronizing Scorecards with Other Systems" (page 139)

—End—

Launching Scorecards

Scorecards is an application contained within the Workforce Optimization Suite; to launch Scorecards you must first log on to Workforce Optimization.

Everyone logs on to the web application using the URL that was defined when the web application was installed. The same logon(s) are used in the client and in the web application. Privileges and scope (generally by

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organization) are associated with the different types of user names, such as Agent, or Supervisor. Thus, everyone has the same login screen. Agents may be prompted to select new passwords when they first log on.

Logging on to the Workforce Optimization Suite

Step	Action
1	Open your web browser, and type the URL for the Application Server in the address bar. The usual format for the URL is: `http://applicationservername:7001/wfo` The login screen appears in a separate window. You must have pop-up blockers disabled/pop-ups enabled for the internal URL for the login screen to appear.
2	Enter your login ID.
3	Enter your password.
4	Click **Login**.

—End—

Note: If you are using both WFO's web application and the Workforce Management Forecasting and Scheduling applications, you use the same user name and password for both.

Navigating in Scorecards

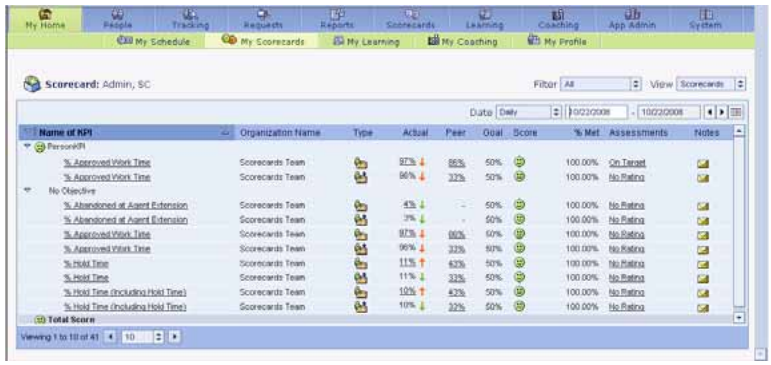
The web application opens on the **My Home > My Schedule** page. With the appropriate role and privileges, you can navigate to these tabs or pages:

- "My Home, My Scorecards page" (page 20)
- "Scorecards Tab" (page 21)
- "System, Scorecards Sources" (page 22)

My Home, My Scorecards page

This page can be used by everyone, for each individual's personal Scorecards results.

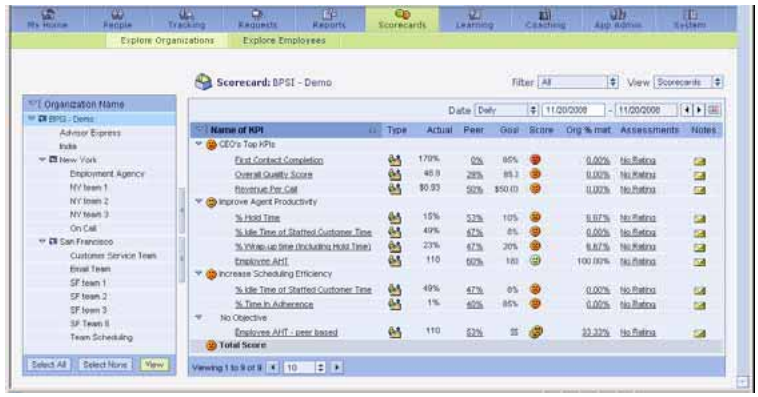
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For details, see the *Scorecards User Guide* (NN44480-122).

Scorecards Tab

This module is used by administrators, managers or supervisors, to view employee and organization Scorecards results.

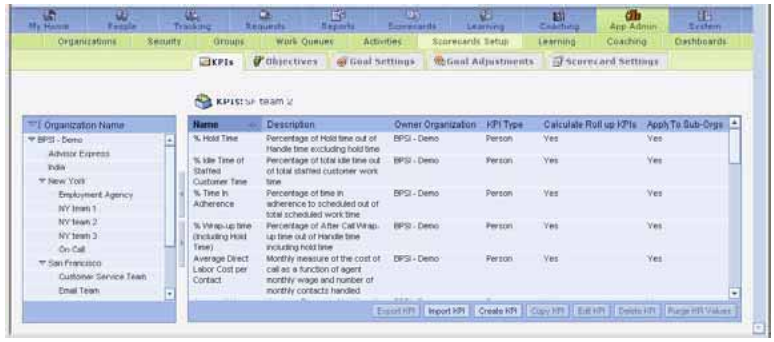


For details, see the *Scorecards User Guide* (NN44480-122).

App Admin, Scorecards Setup Page

This page is used by managers or administrators who need to configure Scorecards setup, such as KPI design, goal setting, and more.

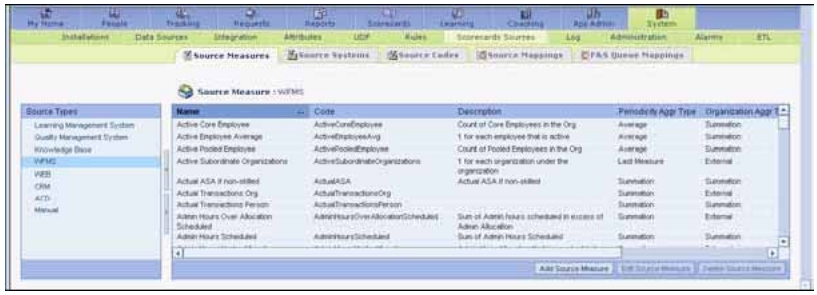
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For details, see "Configuring the Scorecards Setup" (page 81).

System, Scorecards Sources

This page is used by administrators who need to configure Scorecards and F&S data sources.



For details see "Working with Scorecards Sources" (page 59).

Scorecards Configuration Settings

Scorecard configuration settings reside in two different Modules: App Admin, and System.



The App Admin module contains settings for the following Basic Scorecards Functions:

- Importing and copying KPIs
- Editing KPI settings

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And the following additional Advanced Scorecards settings:

- Defining Objectives and Linking KPIs
- Assigning Weights to KPIs

The System module contains settings for:

- Configuring General Settings
- Configuring Data Source Settings
- Configuring Source Measures
- Configuring Source Systems
- Configuring Source Codes
- Configuring Source Mappings
- Forecasting and Scheduling (F&S) Queue mappings

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Working with Roles and Privileges

This chapter describes how to edit or configure roles and privileges available with your Workforce Optimization suite. Roles and privileges are required to manage security and access to Scorecards for Scorecards users.

- "About Roles and Privileges" (page 25)
- "Understanding Roles, Privileges, and Scope" (page 26)
- "Working With Roles" (page 28)
- "Assigning Privileges to Roles" (page 30)
- "Configuring/Editing Scorecards Role Privileges" (page 31)
- "Assigning Access Rights to Users" (page 32)

Note: For more details on roles and privileges in WFM, refer to the *Workforce Management Roles and Privileges Guide* (NN44480-601).

About Roles and Privileges

The Impact 360 suite uses a set of pre-defined roles that have default privileges associated with them.

These pre-defined roles include the Administrator, Manager, Supervisor and Agent roles. When the license for Scorecards is activated, the pre-defined roles also include Scorecards privileges, depending on the role.

When users are assigned these roles, they receive a set of privileges related to managing lesson and competency assignments, related reviews, configuring eLearning related notification alerts and reports, and more.

In the **App Admin** module, you manage security within the Scorecards application by creating roles to which you have assigned certain privileges, and then, in the **People** module, you assign access rights to those roles for users or groups of users.

- "Understanding Roles, Privileges, and Scope" (page 26)
- "Working With Roles" (page 28)
- "Assigning Privileges to Roles" (page 30)

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- "Assigning Access Rights to Users" (page 32)
- "Configuring/Editing Scorecards Role Privileges" (page 31)
- "Assigning Access Rights to Users" (page 32)

Understanding Roles, Privileges, and Scope

Roles contain a set of user privileges allowing the users to whom the role has been assigned to access and manipulate various sections and tabs in Scorecards, and the data within them. For example, an administrator can assign access rights to the Scorecards module to the Manager role. Therefore, anyone to whom the administrator assigns the Manager role will then have access rights to read and write to the sections, tabs, and windows in the Scorecards module. Roles are templates to assign privileges. You will create roles with common sets of privileges. Some default roles are already created.

Privileges determine what functionality a user can access in the Impact 360 solution.

Scope determines which organizations and/or campaigns the privileges apply to.

Roles and **Scope** are assigned to each employee in the **People** module, on the **Access Rights** tab.

See:

- "WFM Predefined Roles" (page 26)
- "Scorecards Default and Preconfigured Roles" (page 27)
- "KPIs and Roles" (page 28)

WFM Predefined Roles

The Impact 360 solution comes with nine predefined roles:

- Agent
- Manager
- Administrator
- Supervisor
- Scheduler
- Ad Hoc Query Analyst
- Branch Administrator
- Branch Employee
- Branch Manager

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There is some overlap between the default roles – for example, both a manager and an administrator can add or edit people. Each of these roles can be modified to add or remove privileges. You can set the default role for a user using the **Set as Default Role** button at the bottom of the **Roles Setup** page. Default role is mainly used during self-registration.



Scorecards Default and Preconfigured Roles

Scorecards contains one default user role and several preconfigured user roles.

Agent - This role, the default, at original installation is used for the employee or individual contributor, and can access the **My Home | My Scorecards** section, and can view Person KPIs. The access to this section is in addition to any access granted for other functions within Impact 360, and is furthermore subject to modification by the administrator.

Administrator - This role has full access to areas of Scorecards, but cannot view Person KPIs. In addition, this role has full access to the **System | Scorecards Sources** section, and all tabs, pages, and dialog boxes within **the App Admin | Scorecards Setup** section (depending on the license).

Manager - At the time of original installation, this role has access to the following Scorecards-related modules: **My Home | My Scorecards**, **Scorecards**, and **App Admin | Scorecards** Setup, and the sections, tabs, pages, and dialog boxes within them, but cannot view Person KPIs. The access to these modules is in addition to any access granted for other functions within Impact 360, and is furthermore subject to change by the Administrator.

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Supervisor – Supervisors have a subset of the permissions that managers have. In particular, they do not by default have access to **App Admin | Scorecards** Setup.

Scheduler – At the time of original installation, this role has access to the following Scorecards-related modules: **My Home | My Scorecards**, **People**, **Scorecards**, and **Reports**, and the sections, tabs, pages, and dialog boxes within them, but cannot view Person KPIs. The access to these modules is in addition to any access granted for other functions within Impact 360, and is furthermore subject to change by the Administrator.

There is a very limited overlap between the roles—for example, both a manager and an administrator can adjust goals.

You can add roles, modify privileges, and the like, to suit your organization's specific requirements.

KPIs and Roles

- KPIs are pre-defined for the default roles. Consequently, it is important that you do not delete default roles.

Default roles with KPIs:

- Agent
- Manager
- Supervisor
- Scheduler
- Administrator

KPIs are defined for the Agent, Manager, Supervisor, Scheduler, and Administrator default roles. You cannot apply a KPI to other user-defined roles. It is very important that you DO NOT delete the default roles.

Working With Roles

You can create and edit roles by navigating to **App Admin > Security > Roles Setup**. See:

- "Creating a new role" (page 28)
- "Editing a role" (page 29)
- "Deleting a role" (page 29)

Creating a new role

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Step	Action
1	Click **Create New Role**. The **Roles Setup** page opens.
2	Type a name and short description for the role.
3	Select the privileges for the role.
4	Specify those employee fields that this role can edit in Forecasting and Scheduling and view in both Forecasting and Scheduling and Impact 360.
5	Click **Save**. The role appears on the list.

—End—

Editing a role

Step	Action
1	Select the role you want to edit.
2	Click **Edit Role**. The **Roles Setup** page opens.
3	Change the privileges for the role.
4	Click **Save**. The modified role appears on the list.

—End—

Deleting a role

Step	Action
1	Select the role you want to delete.
2	Click **Delete Role**.
3	Click **OK** to confirm the deletion.

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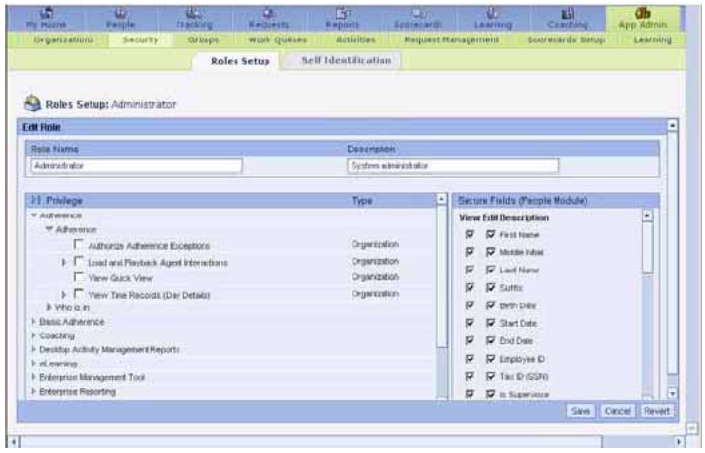
ATTENTION

Do not delete default roles that were included with the installation. KPIs are already pre-defined for these roles.

—End—

Assigning Privileges to Roles

When creating a new role or editing an existing role, you see a list of the applications/modules contained within the suite. You must expand each item in the list to see the privileges associated with each application/module. Note that privileges are grouped by categories (for example, under **Adherence**, the categories are **Adherence** and **Who is in**.



Under the **Type** header, beside each privilege name is the name of the type associated with that privilege. **Type** designates whether the functionality granted with the privilege applies to organization-specific data, campaign-specific data, generic data, or group data. If the privilege is organization or campaign specific, users who are granted that privilege are only able to use the functionality on organizations or campaigns within their scope.

Depending upon the type of licenses purchased, you may not see all possible applications/modules, privileges categories, or privileges.

See:

- "Configuring/Editing Scorecards Role Privileges" (page 31).

Note 1: If the role you are setting up needs to be able to view and edit employees in Forecasting and Scheduling or the web application, this

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role must have at a minimum **Edit** privileges for the **First Name** and **Last Name** fields. To configure these privileges, check the boxes in the **Secure Fields (People Module)** area to the left of the privilege area. The role must also have privileges to view and configure organizations in the **Foundation** category.
Two users with a similar role need to have different privileges and you want both to be able to view KPIs on the Scorecard, grant the common privileges to the pre-defined role, and assign this role to both users with the appropriate scope. Then create additional roles with additional permissions, and assign these roles as needed to the users.

Note 2: If two users with a similar role need to have different privileges and you want both to be able to view KPIs on Scorecard, grant the common privileges to the pre-defined role, and assign this role to both users with the appropriate scope. Then create additional roles with additional permissions, and assign these roles as needed to the users.

Configuring/Editing Scorecards Role Privileges

Numerous features in Scorecards only work correctly if the appropriate privileges are assigned to the appropriate roles. You may need to edit these privileges from time to time, or enable some if you create a new role.

As an administrator you can enable or disable the Scorecards privileges for each role in your contact center.

Note 1: For details on each Scorecard-related privilege, see Appendix "Scorecards Privileges" (page 117). Privileges in Appendix A are grouped within privilege categories, such as **General Setup**, **Goals**, and **Objectives**.

Note 2: To be able to drill through to other applications you need to enable certain Scorecards privileges. For Drill though to Interactions, enable the **View Quality Monitoring Interactions** and the **View Contact Viewer Interactions** privileges.

To add or edit Scorecards-related privileges assigned to Impact 360 roles:

Step	Action
1	Navigate to **App Admin|Security|Roles Setup** .
2	In the **Edit Role** list, expand **Scorecard**. A list of privilege categories (such as **General Setup**, **Goals**, **Objectives**) displays.
3	Expand each Scorecard privilege category, and check the boxes beside the privileges you want to assign to the role. See Appendix "Scorecards Privileges" (page 117) for details on individual privileges.

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—End—

Assigning Access Rights to Users

Access to all functions in Impact 360 is controlled through the use of roles. Each individual is assigned a Role and a Scope. The Scope is the Organization(s), Campaign(s), and/or Group(s) that the role applies to.

For example, a manager may have access to view the schedules and time records of people in his own organization but not those in other organizations.

The scheduler may also have these privileges, but they also have the privilege to create forecasts and configure campaigns, so they will also have a campaign scope.

Roles limited to generic privileges generally do not need a scope. Agents often only have generic privileges and do not need scopes. Their access to view others' schedules is controlled through organizational settings, and is discussed later.

See:

- "Assigning access rights to an employee" (page 32)

Assigning access rights to an employee

Step	Action
1	In the **People** module, click the **Access Rights** tab to open the **Access Rights** window.
2	In the window, select a user name, and then click the **Edit Access Rights** button to open the **Access Rights** window on the right panel.
3	Under the **Role Name** header, check the boxes beside the roles that you want to assign to the new user. ***Note:*** If you want the user to be able to take lessons, in addition to having administration privileges, make sure that the **Agent** box is checked.
4	In the **Organization Scope** area, check the boxes beside the organizations for which you want the user to have the role privileges. Note that the suborganizations of the organizations that you check are also automatically selected.

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5 If applicable, check the appropriate boxes in the **Campaign Scope**, **Group Scope** and **Installation Scope** areas.

6 Click the Save button. The user can now log on and use the functionality available.

Note 1: Before a role can be assigned to an employee, a user name must be assigned. For instructions on assigning user names, see "Creating a User Name and Employee Password" (page 48).

Note 2: Multiple roles can be assigned to each employee. When you assign multiple roles to an employee, you need to explicitly assign the scope for each role. The scope will not automatically default to be the same for each role. If some privileges are duplicated among the roles, the privilege will be applied to the greatest scope for the user.

Note 3: Depending on your license you may see another pane called **Installation Scope**.

—End—

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Configuring Organizations, People and Notification Alerts

This chapter describes how to use Workforce Management features that allow you to add and edit organizations, and add and edit employee profiles. The chapter also provides an overview on roles and privileges that you need as a Scorecards user, and how to configure a KPI Out of Range notification alert if you have an Advanced Scorecards license.

This chapter contains the following topics:

- "Managing Organizations" (page 35)
- "Maintaining People Information" (page 41)

Note: For more details on configuring organizations and people in WFM, refer to the *Nortel Workforce Management Administration Guide* (NN44480-600).

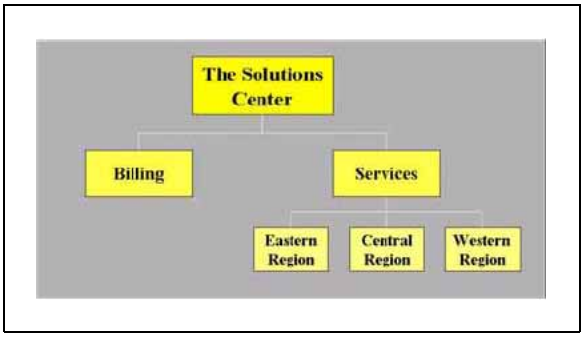
Managing Organizations

The basic organizational structure (user hierarchy) for the Workforce Optimization suite is established at the time of installation and initial data import.

However, if you have appropriate role and privileges, you can use Forecasting and Scheduling or the Workforce Optimization Suite's web application to update and manage all organizational setup and parameters. The organizational structure is displayed in both Forecasting and Scheduling and the web application.

Forecasting and Scheduling view:

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WFO web application view



Organizational Hierarchy

The organizational hierarchy is usually defined in the Solution Design phase of an implementation. The configuration of the organization hierarchy (or organization structure) is important to the Scorecards application as well as other Impact 360 applications.

Data is aggregated (rolled up) according to the organization hierarchy on the scorecards and in many of the reports included in the Impact 360 suite. The organization structure affects how Scorecards KPIs are defined and calculated since many KPIs are shared down the organization structure and calculated on aggregate scores of employees within an organization.

The organization structure also makes it easier to organize and find employees and define rules specific to one organization. Access scope is defined by organizations and some permissions (privileges) are assigned by organization.

In all instances except for **Holidays**, any information entered in a higher level organization will flow down through its branch. If exceptions are needed for a particular child organization, selecting that organization and changing parameters for that organization only is possible.

> ***Note:*** Organizational information can only be edited in the organization to which it belongs by someone with configuration privileges for that organization.

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For details on organization management, see:

- "High Level Procedures for Adding New Organizations" (page 37)
- "Creating Organizations" (page 38)
- "Creating and Editing Organization Job Titles" (page 38)
- "Adding a New Queue" (page 40)

High Level Procedures for Adding New Organizations

Complete the tasks below to add a new organization to Workforce Management or the Impact 360 web application:

Step	Action
1	Add the organization in Forecasting and Scheduling or the web application. For details, see the *Nortel Workforce Management Schedulers Guide* (NN44480-114).
2	Add/transfer the people to the new organization. Be sure to add their ACDID for agent statistics. For details, see the *Nortel Workforce Management Administration Guide* (NN44480-600).
3	Run the DataWarehouse Sync. For details, see the *Nortel Workforce Management Scorecards Adapters Guide* (NN4480-605).
4	Give access rights to users (can be done anytime after the DataWarehouse Sync is done).
5	Complete Forecasting and Scheduling Queue Mapping to the new organization as needed. You may choose to set the organization to map queues automatically or manually. For details, see the *Nortel Workforce Management Administration Guide* (NN44480-600).
6	Import or copy KPIs to the organization. (If KPIs are already imported to the highest level organization, this step may be ignored, since KPIs flow down the organizational tree.) For details, see"Configuring the Scorecards Setup" (page 81).
7	Create or copy objectives as needed. For details, see "Configuring the Scorecards Setup" (page 81).
8	Create the Scorecards organization. For details, see "Managing Organizations" (page 35).
9	Run the other integration packages.

—End—

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Creating Organizations

You can create organizations either in the web application or in Forecasting and Scheduling. For the purposes of this document, the following describes how to create an organization in the web application.

Creating an organization

Step	Action
1	Go to **App Admin | Organizations | Settings**.
2	Click **Create New Organization**.
3	Complete the fields.
4	Click **Save**. The organization record is created. You can expand the Organization Settings page to view a summary of your organizations and their structure. You can also add, edit, or delete organizations from this page. ***Note:*** For Scorecard roll-ups, all Organizations that will need KPIs aggregated should have a common start day of week. Once employees are entered, the following fields cannot be changed: • Time Zone • Start Day of Week • Day Boundary

—End—

Creating and Editing Organization Job Titles

Organization Job Titles are optional ways to group employees. Job Titles can be created at any level of the organization to flow down the organizational tree. They can be copied from one organization to other organizations if needed as well.

Job titles can be used for sorting and filtering all employees in the web application.

With Advanced Scorecards you can set different goals for different job titles for employees who are in the same organization. For instance, you may create CSR I and CSR II job titles and assign them to agents in the same organization. You can then assign lower AHT goals to CSR II than CSR I agents.

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See:

- "Creating a new job title" (page 39)
- "Copying a job title to a different organization" (page 39)
- "Editing a job title" (page 40)
- "Deleting a job title" (page 40)

Creating a new job title

Step	Action
1	Select an organization in the left pane.
2	Click **Create New Job Title** to open the **Create New Job Title** window.
3	Type the job title and a short description.
4	Click **Save**. The new job title is listed.

—End—

Copying a job title to a different organization

Step	Action
1	Select the job title in the right pane.
2	Click **Copy Job Title** to open the **Copy Job Title** dialog box.
3	Select an organization or organizations.
4	Click **Copy to Selected Organization(s)**. ***Note:*** Job titles flow down the tree even though you may copy them to other organizations (useful for copying select job titles to parallel organizations).

—End—

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Editing a job title

Step	Action
1	Select the job title in the right pane.
2	Click **Edit Job Title**.
3	Make the desired changes.
4	Click **Save**.

—End—

Deleting a job title

Step	Action
1	Select the job title in the right pane.
2	Click **Delete Job Title**.
3	Click **OK** to confirm deletion.

—End—

Adding a New Queue

Adding a new queue is simpler than adding a new organization, however, it involves both the addition of the queue and the source mapping in Scorecards. Refer to the *Nortel Workforce Management Administration Guide* (NN44480-600), and follow the high level procedures below to add a new queue to Impact 360.

Step	Action
1	Create the new queue.
2	Map the appropriate ACD group(s) to the new queue.
3	Link the queue to the appropriate campaign, or create a new campaign and link the new queue.
4	Update the Forecasting and Scheduling Queue Mapping to organization(s) as needed. if the organization(s) linked to the

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campaign where the queue is used have been set for Automatic Mapping, the organization-queue mapping will update automatically. Otherwise, complete the manual F&S Queue Mapping in the web application.

—End—

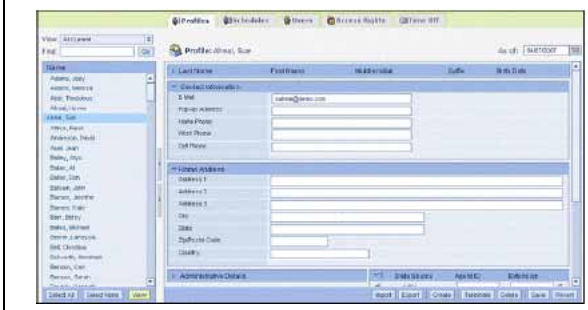
Maintaining People Information

As Scorecards Administrator, you need to administer and manage employee and people information. This section covers the following procedures:

- "Editing Employees" (page 41)
- "Creating Employees" (page 42)
- "Terminating Employees" (page 42)
- "Deleting Employees" (page 43)
- "Associating Employees With Data Sources" (page 43)
- "Creating and Using Employee Filters" (page 45)
- "Exporting People Information" (page 47)
- "Managing User Names, Account Status, and Passwords" (page 47)

Editing Employees

You can edit employee names, contact information, administrative details, address, and data source information in the **People** module's **Profiles** tab.



You can also edit certain information for multiple employees at a time. This information includes rank, start date, end date, organization, supervisor, job title, and data association to a Nortel Quality Monitoring data source.

Changes made in the web application appear in Forecasting and Scheduling, and vice versa. It's also possible to share employee information with the Nortel Quality Monitoring application.

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Creating Employees

Your system is configured to use either the WFM/Scorecard system or the Nortel Quality Monitoring system as the "master" system. New employees should always be created in the "master" system, and additional configuration will be required in the system that is not the "master". Consult your system administrator to determine how your system is configured and what processes your organization will follow for creation of new employees.

Creating a new employee record:

Step	Action
1	In the web application, click **People > Profiles**, then click **Create**.
2	Complete the Profile fields.
3	Click **Save**. The new employee record is created. After creating an employee, you must associate the new employee with a Data source. See "Associating Employees With Data Sources" (page 43).

—End—

Terminating Employees

When you terminate an employee, an end date is automatically added to the employee's record. The employee's record remains in the system, but employees with end dates earlier than the current date are considered terminated and will not be scheduled to work.

See: "Terminating an employee" (page 42).

Terminating an employee

Step	Action
1	Highlight the employee in the left pane of the **Profiles** tab and click **View**.
2	Highlight the employee you wish to terminate.
3	Set the **End Date** to the first day the employee is no longer working; if the **End Date** is set to the last working day, the employee will show as out of adherence for the entire day.

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4 Click **Terminate**, then click **OK** to confirm the termination.

—End—

Deleting Employees

Unlike termination, where the employee record remains in the system, deletion completely removes the employee record.



WARNING
Deletion will erase all past information associated with the employee, including schedules, adherence information, and other statistics, which could cause reports about past dates to be erroneous. Do not delete an employee unless you are certain that there is no historical information of value associated with the employee record. Termination, rather than deletion is the preferred procedure, as with termination, historical employee data will remain intact.

Deleting an employee

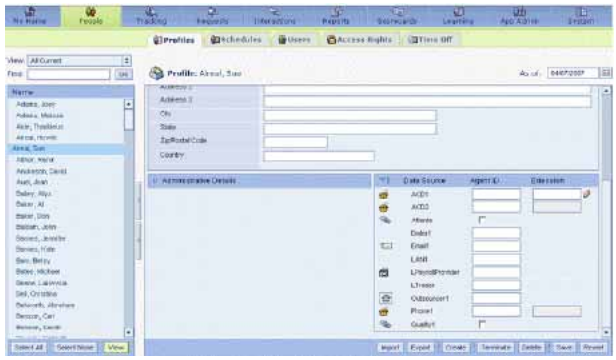
Step	Action
1	Highlight the employee in the left pane of the **Profiles** tab and click **View**.
2	Highlight the employee you wish to delete.
3	Click **Delete**. A message box appears, asking you to confirm the deletion.
4	Click **OK**.

—End—

Associating Employees With Data Sources

After you create a new employee, you must associate that employee with a data source.

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The Data Source area lists the data sources with which an employee can be associated. To associate the employee with the data source, enter the employee's ID for that data source.

An Agent ID is required for each data source so that data coming from that data source can be associated with the correct employee. To associate the employee with the data source, enter the employee's ID for that data source.

If your site uses Nortel Quality Monitoring, click the **Quality Monitoring** checkbox to associate that data source with employees who are also defined in the Nortel Quality Monitoring system. The Nortel Quality Monitoring Data Source does not require an Agent ID. See "Configuring Drill Through to Nortel Quality Monitoring" (page 141) for more information on configuring these data sources.

The information from the Nortel Quality Monitoring data source can be used in both Forecasting and Scheduling, and as part of the employee's adherence information.

If your site uses Full-time Recording, locate the data source for the employee, which can be a Phone or Dialer switch, or a LAN, and then type or import the Agent ID and/or Phone Extension. For the Phone Extension, you can also click the pencil icon to show the **Select Extension** window, choose the extension, and then click **Set**.

For information on importing data sources for Full-time Recording, refer to Data Source Import Formats in the *Enterprise Manager Administration Guide*.

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Depending upon the seating arrangement set-up in the Phone data source—Free, Fixed, or Hybrid—you might have to type the Agent ID, extension, or both. For the Phone Extension, you can also click the **Pencil** icon to show the **Select Extension** window, choose the extension, and then click **Set**.

The data sources will typically be an ACD and the Nortel Quality Monitoring System.

Creating and Using Employee Filters

Filters are very useful when the employee group is large. Filters are also required to run scorecard reports.

You can create and save filters for your personal use. There are no limits to the number of filters you may create.

On the **People** module's **Profiles** tab, the default filter showing in the **View** drop-down list is 'All Current'. When this filter is applied, terminated employees and employees who have been entered in the system but have not yet started working do not appear on the list of employees.

The **All Current** and **No Filter** default filters display for all users and may not be edited or deleted.



See:

- "Creating Custom Employee Filters" (page 45)
- "Editing a Custom Employee Filter" (page 46)
- "Deleting a Custom Filter" (page 47)

Creating Custom Employee Filters

To create a new filter on the **People** module's **Profiles** tab:

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Step	Action
1	In the web application, navigate to **People >Profiles**, and select **Create Filter** from the bottom of the View drop down list.
2	In the upper left pane, select the organization(s) to filter. Selecting an organization automatically selects all its sub organizations. Select only organizations that you have privileges to view.
3	Select a time frame for the filter.
4	For each item you want to filter by, type a value or make a selection from the drop-down menu. The menus contain only information applicable to the selected organization(s). If you change the organization, the data will be refreshed.
5	Click the **Default Filter** checkbox if you want to display this filter automatically when the module is opened.
6	Click **Save As** and enter a unique name for the filter.

—End—

Editing a Custom Employee Filter

Step	Action
1	Select the filter you want to edit
2	Select **Edit Filter** from the **View** drop-down list.
3	For each field you want to change, select or deselect an operator.
4	Type or select a value from the list.
5	Click **Clear** to remove all settings.
6	Click **Save** to save the filter and return to the previous page.

—End—

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Deleting a Custom Filter

Step	Action
1	Navigate to **People >Profiles**, and in the **Filter** menu, select the filter you wish to delete.
2	Click **Delete**.
3	Click **OK** to confirm the deletion and return to the previous page.

—End—

Exporting People Information

You can export some information from the **People** module to a text file.

Step	Action
1	Multi-select the people whose data you want to export.
2	Click the **View** button. (If you are only viewing one person, only that person's data is exported.)
3	Click the **Export** button. A pop-up window offers the option of whether you want to open or save the file. • If you open the file, the data is exported and the text file will be opened in the Notepad application. You can then save it or print it from the Notepad. • If you save the file, a second window pops up, with the option to save the file, and the name of the file to be saved. The data is exported to a text file in the location that you specify. You can navigate to that location to find and open the file in Notepad, Excel, or some other application. The data that is exported includes: full name, birth date, start and end dates, organization, supervisor, supervisor status (T/F), job title, tax ID, rank, hourly wages, and Employee ID.

—End—

Managing User Names, Account Status, and Passwords

Employees must have user names and passwords to access the web application. These can be managed in the Users tab of the People module.

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See:

- "Creating a User Name and Employee Password" (page 48)
- "Changing an Employee Password" (page 48)
- "Viewing and Modifying Account Status" (page 49)

Creating a User Name and Employee Password

Step	Action
1	Navigate to the **Users** tab of the **People** module.
2	Select the employee or employees in the selection pane.
3	Click the **View** button.
4	Type a unique user name and a password that is at least as long as the minimum password length (eight characters by default). There is no requirement for combining alpha and numeric characters for the password.

—End—

Changing an Employee Password

Step	Action
1	Navigate to the **Users** tab of the **People** module.
2	Select the employee in the selection pane.
3	Click the **View** button. If an employee forgets his/her password, you can enter a new password for him/her from this screen without knowledge of the current password. Depending on the permission, employees may change their passwords in their **My Profile** screens.

—End—

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Viewing and Modifying Account Status

Step	Action
1	Navigate to the **Users** tab of the **People** module.
2	Select the employee in the selection pane.
3	Click the **View** button.

You can view an employee's account status in the **Account Status** column. You can also modify an employee's status using the selector menu that displays the **available account status** options. These options depend on the current user's account status.

The various possible account option statuses are:

Status	Description
Active:	The user's account is active.
Force Password Reset:	Forces the user to change his password the next time he logs in. The new password should be in accordance with the active password policy (**General** side-bar element).
Force Password Reset with ID:	Forces the user to change his password the next time he logs in, but he must identify himself before the password can be reset. The new password should be in accordance with the active password policy (**General** side-bar element).
Locked Account – by Admin:	The user's account has been locked by an administrator and can only be unlocked by an administrator.

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Status	Description
Locked Account – Failed Login	The user's account has been locked automatically because of failed login attempts. This feature can be turned on and off using the **System | Administration | General** side-bar element. Once an account is locked this way, it can be unlocked automatically (depending on the settings in the **General** side-bar element), or you, as administrator, can unlock it.
Locked Account– Inactivity	The user's account has been locked automatically because the user has not used the system for more than the number of days specified using the System | Administration | General side-bar element. This feature can be turned on or off (configured) using the General side-bar element. Once an account has been locked this way, only you, as administrator, can unlock the account.

The two account statuses, **Locked Account – Failed Login** and **Locked Account – Inactivity**, are not available as options in the account status selector as they are used to automatically lock user accounts when an account locking policy is active.

—End—

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Working with Notification Alerts

This chapter describes how to configure a KPI Out of Range notification alert if you have an Advanced Scorecards license, and how to drill through to Scorecards when receiving an e-mail triggered by a notification alert.

This chapter contains the following topics:

- "Creating or Modifying a KPI Out of Range Alert Rule (Advanced Scorecards)" (page 51)
- "Drilling Through from E-mail to Scorecards" (page 57)

For more details on working with notification alerts in WFM, refer to the *Nortel Workforce Management Administration Guide* (NN44480-600).

Creating or Modifying a KPI Out of Range Alert Rule (Advanced Scorecards)

In the Workforce Management suite, users with the appropriate role(s) can configure a KPI Out of Range notification alert rules so that agents and their managers automatically receive e-mail messages or a pop-up message, triggered by a KPI value specified in the alert rule. eLearning lessons may also be assigned to individuals if that feature is configured in the alert rule.

The Notification Alerts feature is part of the Tracking module.

See:

- "Configuring a KPI Out of Range Alert Rule" (page 51)
- "Drilling Through from E-mail to Scorecards" (page 57)

Configuring a KPI Out of Range Alert Rule

Step	Action
1	Navigate to **Tracking > Alert Rules > Organization** and, from the left panel, select the organization for which you want to create a notification alert.

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2 On the **Organization Alert Rule** screen, click the arrow icon beside the **Rule** drop-down list box, and then select the **KPI Out of Range** option. The window refreshes to show the KPI Out of Range rule form.

3 In the **Rule** area, set the criteria to trigger the notification alert by doing the following:

- To specify the value of the agent's KPI and its periodicity, click inside the box containing the value options, click the **KPI** box, and the **periodicity** box, and then select the appropriate option from each. For example you can:

  1. is you are creating the alert rule for individuals, select a **(Person)** option from the **KPI** box. Otherwise, select one of the **(Organization)** options.
  2. select the **Actual Value** option from the value option box
  3. select the **Annually** option in the **periodicity** box

- Then type a value in the comparison box, and select the **greater than or equal**, or **less than or equal** option
- Click the **for All Employees/Organizations** or **for the employee with the title of** option. If you select the **for the employee with the title of** option, click the arrow icon beside the adjacent box, and then select the appropriate title.
- Select the **And** or **Or** option, and then click one of the two subsequent radio buttons. If necessary, specify the peer value percentile and numbers of periodicity units.
- To specify how often to send the notification alert, type the number of attempts beside the **Send alerts no more than once every** box, click the arrow icon in the adjacent box, and then select **Days** option.

  Note: You should not configure the system to send more than one notification a day.

4 Click **Action: Send Mail** to expand the area, then configure the area as follows.

- In the **To Whom** area, select the appropriate Notification Alert address option(s):

  1. Check the **Employees** box if you want the alert sent to the employees in the organization that meet the alert rule.
  2. Check the **Direct Supervisors** box if you want the alert sent to the supervisors in the organization that meet the alert rule.

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3. Check the **Additional users by login names (semicolon separated)** box and type the user logon names (separated by a semicolon), if you want the alert to go to other users in the system.
4. Check the **Additional users by role** box, and then click beside the drop-down list box and select a role, such as **Administrator** or **Manager**, if you want the alert to go to users in the organization that meet the alert rule.
5. Check the **Additional E-Mail targets (semicolon separated)** box and type the e-mail addresses (separated by semicolons) of those individuals to whom you want to send the alert.

- In the **Subject Line** area, check the boxes beside one or more subject line options, such as **Text**, **Employee Names**, **Organization Name**, and/or **Rule Name**. If you choose the **Text** option, type the text for the subject line in the adjacent text box.
- Click the arrow icon beside the **E-Mail Delivery Template**, and then select the **Low**, **Standard**, or **High** priority delivery option.

Note: If you select all supervisors/managers to receive copies of the e-mail alerts sent to agents, the supervisors receive a single consolidated e-mail, containing information about each agent receiving that notification alert.

5 Click **Action: Send Pop-up Alert** to expand the area, and configure as follows:

- In the **To Whom** area, select the appropriate Notification Alert address option(s):
  1. Check the **Employees** box if you want the alert sent to the employees in the organization that meet the alert rule.
  2. Check the **Direct Supervisors** box if you want the alert sent to the supervisors in the organization that meet the alert rule.
  3. Check the **Additional users by login names (semicolon separated)** box and type the user logon names (separated by a semicolon), if you want the alert to go to other users in the system.
  4. Check the **Additional users by role** box, then click beside the drop-down list box and select a role, such as **Administrator** or **Manager**, if you want the alert to go to users in the organization that meet the alert rule.

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5. Check the **Additional delivery targets (semicolon separated)** box and type the login names (separated by semicolons) of those individuals to whom you want to send the alert.

   Note: You can send pop-up alerts with these notification alert types: New Lesson Assigned, Lesson Due Date and KPI Out of Range.

- In the **Subject Line** area, check the boxes beside one or more subject line options, such as **Text**, **Employee Names**, **Organization Name**, and/or **Rule Name**. If you choose the Text option, type the text for the subject line in the adjacent text box.
- Click the arrow icon beside **the Pop-Up Delivery Template**, and then select the **Normal**, **High**, or **Confidential** priority delivery option.

6 To specify whether to assign lessons mapped to competencies if the alert rule is triggered, check the box beside **Action: Assign Competency Lessons**, and then configure the following options:

- In the **To Whom** area, select the appropriate Notification Alert address option(s):

  1. Check the **Employees** box if you want the alert sent to the employees in the organization that meet the alert rule.
  2. Check the **Additional users by login names (semicolon separated)** box, and then type the user names (separated by a semicolon), if you want the alert to go to other users in the system
  3. Check the **Additional users by role** box, click the arrow icon beside the drop-down list box, and then select a role, such as **Administrator** or **Manager**, if you want the alert to go to users in the organization that meet the alert rule.

- In the **Lesson Details** area, check the **All Lessons mapped to Competency** box, click the arrow icon beside the adjacent box, and then select the competency to which the lessons are assigned.
- In the **Assignment Details** area

  1. Check the **Due date in <x> days** box, and then type the number of days in which the competency achievement is due.
  2. Click the arrow icon beside the **Priority** box, and then select the **Low**, **Medium**, or **High** priority delivery option.

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Note: If you selected a **(Person)** option in Step 3, this notification alert is triggered for all employees in the organization that meet the rule. If you selected an **(Organization)** option in that step, the alert is triggered for all employees in the organization.

7 To specify the lesson for which this notification alert should be triggered, check the box beside the area header **Action: Assign Lesson**, and then configure the following options as required:

- In the **To Whom** area, select the appropriate Notification Alert address option(s):
  1. Check the **Employees** box if you want the assigned to the employees in the organization that meet the alert rule.
  2. Check the **Additional users by login names (semicolon separated)** box and type the user logon names (separated by a semicolon), if you want the alert to go to other users in the system
  3. Check the **Additional users by role** box, click the arrow icon beside the drop-down list box, and then select a role, such as **Administrator** or **Manager**, if you want the alert to go to users in the organization that meet the alert rule.
- In the **Lesson Details** area, check the **Lesson** box, click the arrow icon in the adjacent drop-down list box, and then select a lesson from the list.
- In the **Assignment Details** area, do the following:
  1. Check the **Due date in <x> days** box, and then type the number of days in which the competency achievement is due.
  2. Click the arrow icon beside the **Priority** box, and then select the **Low**, **Medium**, or **High** priority delivery option.

     Note: If you selected a **(Person)** option in Step 3, this notification alert is triggered for all employees in the organization that meet the rule. If you selected an **(Organization)** option in that step, the alert is triggered for all employees in the organization.

8 Click the **Save** button. Notification alerts are sent regarding the KPI Out of Range rule as per your specifications.

To edit or delete notification alert rules, see:

- "Editing a notification alert rule" (page 56)
- "Deleting a notification alert rule" (page 56)

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To drill through to Scorecards from an email alert, see "Drilling Through from E-mail to Scorecards" (page 57),

—End—

Editing a notification alert rule

Step	Action
1	Navigate to **Tracking > Alert Rules > Organization** and, from the left panel, select the parent organization for which you had created the notification alert rule that you want to edit. The right panel refreshes, showing the list of notification alerts for that organization. ***Note:*** If you select a suborganization, you see the list of notification alert rules but you cannot edit or delete a notification alert rule that was created for the parent organization.
2	From the list on the right panel, select the notification alert rule you want to edit.
3	Click the **Edit** button at the bottom right of the right panel. The window refreshes with the selected notification alert rule's information form.
4	Make the desired changes to the notification alert rule form, and click the **Save** button.

—End—

Deleting a notification alert rule

Step	Action
1	Navigate to **Tracking > Alert Rules > Organization** and, from the left panel, select the parent organization for which you had created the notification alert rule that you want to delete. The right panel refreshes, showing the list of notification alerts for that organization ***Note:*** If you select a suborganization, you see the list of notification alert rules but cannot edit or delete a notification alert rule that was created for the parent organization.

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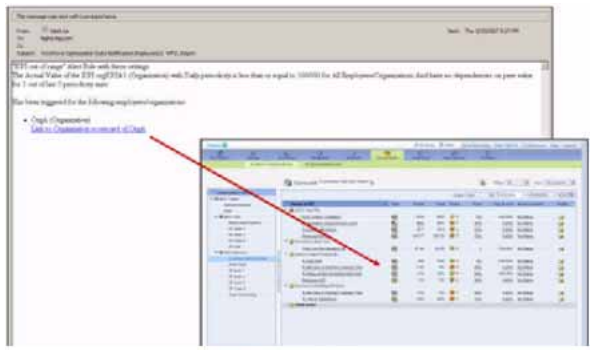
2 From the list on the right panel, select the notification alert rule you want to delete.

3 Click the **Delete** button at the bottom right of the right pane. The notification alert rule is no longer listed.

—End—

Drilling Through from E-mail to Scorecards

When the user receives a KPI Out of Range notification that a lesson has been assigned, the e-mail provides a drill through to Scorecards to view the KPI.



Example of an Alert Rule: The KPI value of AHT with periodicity weekly is greater than or equal to 45 for the employee with the title of Agent and the employee is below the 50% percentile of his/her organization for 3 out of last 8 periodicity units.

If the defined rule finds an Agent with poor KPI score, the Employee and Competency pair is saved to a database table.

The Integration Server runs the Competency Export Adapter and saves the Competency data to a CSV file.

Note:

- The scheduled task created in the web application checks the rule on all agents for each time period.
- An E-mail alert can be set up to schedule the agent for eLearning.
- The Competency and Employee mapping is saved in the database and is ready for export to eLearning.

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- Competencies are exported using the eLearning Competency Export Adapter.

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Working with Scorecards Sources

This chapter describes how to configure the data sources that allow the Scorecards application to measure performance in your organization.

This chapter contains the following topics:

- "Data Source Management" (page 59)
- "Scorecards Data Flows" (page 60)
- "Adding/Editing Source Measures" (page 64)
- "Deleting Source Measures" (page 66)
- "Managing Source Systems" (page 66)
- "Working With Source Codes" (page 68)
- "Managing Scorecards Source Mappings" (page 69)
- "Forecasting and Scheduling Queue Mapping" (page 76)

Data Source Management

Managing Source Measures, Source Systems, and Source Mappings are essential administrative tasks within the Scorecards application that allow administrators to configure how Scorecards retrieves and uses the data required for performance measurement, including KPI configuration, within your organization.

See:

- "Scorecards Data Flows" (page 60)
- "Managing Source Measures" (page 61)
- "Managing Source Systems" (page 66)
- "Working With Source Codes" (page 68)
- "Managing Scorecards Source Mappings" (page 69)
- "Forecasting and Scheduling Queue Mapping" (page 76)

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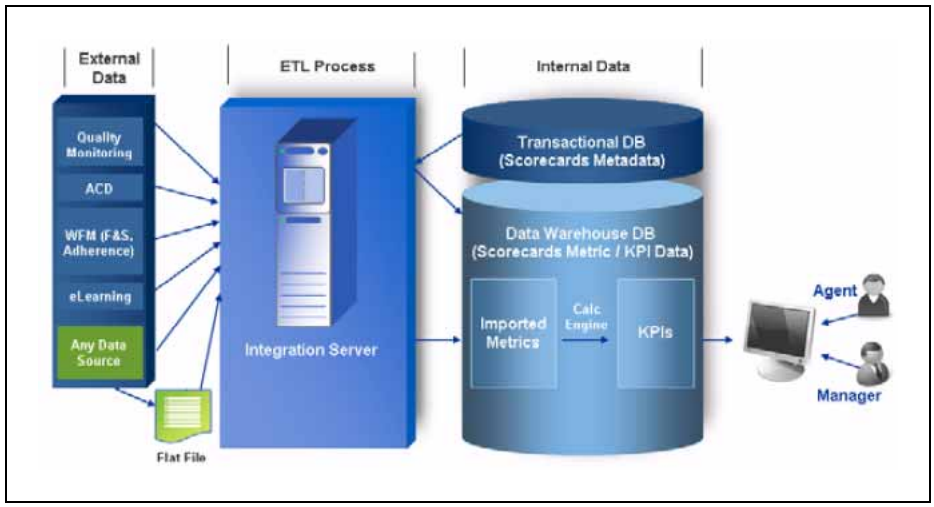
Scorecards Data Flows

External Scorecard data comes from source systems such as ACDs, Forecast and Scheduling, Adherence, Quality Monitoring, and also from customer-specific systems. Data which comes from these source systems is referred to as source measures. Source measures are the values that are used to calculate KPIs.

Source measures are associated with source systems, which are related to source types, such as a Workforce Optimization Suite System (WFMS). A source system in WFMS could be Forecasting and Scheduling. The Source System has a name, description, and most importantly, a code. The code is used by external programs to identify that the data came from this particular source system.

Once you've created an association between a source measure (data) and the source system, concatenated codes are used by external programs to identify that the data came from this particular source system and this source measure.

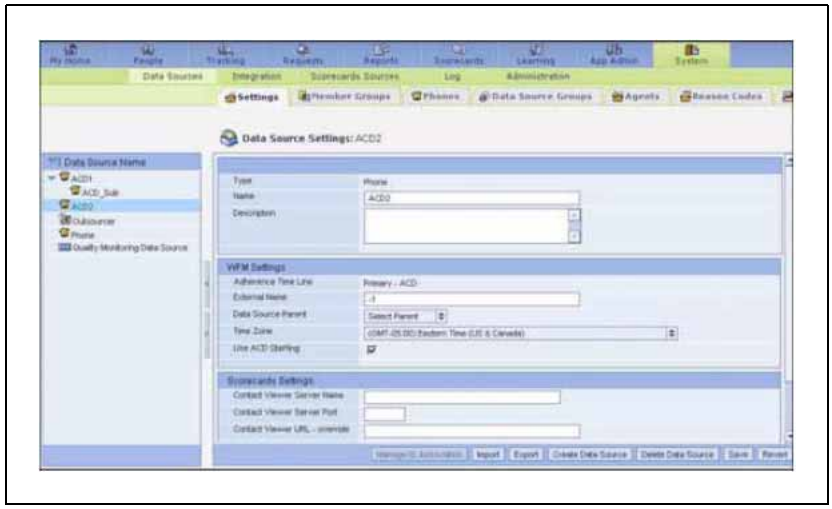
For details on data sources, typically ACDs, see "About Data Sources" (page 60).



About Data Sources

Each data source, typically an ACD, is configured through the Integration Server and **Data Sources Settings** screens. Data sources are usually established and configured during integration by Nortel's Professional Services. It is unlikely that you will ever need to edit these parameters or create a new data source.

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Note: If in the future you add a new ACD to your environment, contact Professional Services to complete the integration.

Once data sources have been configured on the Integration server, you can configure user profiles in the **People** module to associate employees with the appropriate data sources.

An Agent ID is required for each external data source so that data coming from that data source can be associated with the correct employee.

For information about associating employees with data sources, see "Associating Employees With Data Sources" (page 43).

Managing Source Measures

The data used to calculate Scorecards' Key Performance Indicators (KPIs) are called **Source Measures**. This data is drawn from various contact center management systems, which are called Source Systems.

Navigate **to System > Scorecards Sources > Source Measures** to open the **Source Measure**screen and view, add or edit source measure data.

For details on Source Measures, see:

- "Source Systems and Source Measure Data" (page 62)
- "Source Measures for Nortel Quality Monitoring, Forecasting and Scheduling, or Adherence" (page 62)
- "How Scorecards Uses Source Measure Data" (page 63)
- "Source Measure Fields And Their Values" (page 63)
- "Adding/Editing Source Measures" (page 64)
- "Deleting Source Measures" (page 66)

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Source Systems and Source Measure Data

The Scorecards application uses integration adapters to load source measure data into the warehouse database from the following source systems:

- Forecasting and Scheduling – provides source measure data on agent schedules, forecasts, and actual work activities performed. Certain ACD metrics (Service Level, Actual Calls) are also provided through the Forecasting and Scheduling framework, but do not require active usage of the Forecasting and Scheduling application.
- Adherence – provides source measure data on agent-level activity and adherence metrics based on the data collected with the Time Collection adapter.
- Generic Agent ACD Stats – provides source measure data on detailed call progress and call handling. Individual metrics may or may not be available from a given ACD. Documentation for the specific ACD adapter should be consulted to ensure a specific metric is available.
- Quality Monitoring – provides source measure data on agent-level evaluation metrics from the Nortel Quality Monitoring system.
- Speech Analytics provides source measure data on Hit/No Hit category values for agents from the Speech Analytics system.
- eLearning - provides source measures data on Competency score metrics from the eLearning system.

Note: Any source using a CSV file can be a data source for Scorecards.

Source Measures for Nortel Quality Monitoring, Forecasting and Scheduling, or Adherence

In addition to the source measures included with the application, the Adherence Measure Extract, the Forecasting and Scheduling (F&S) Measure Extract, and the Quality Calculator adapters can each load specific types of performance data to source measures that are created and mapped after installation.

- The Adherence Measure Extract adapter loads source measures with *total actual time* in selected activities.
- The F&S Measure Extract adapter loads source measure with *total scheduled time* in selected activities.
- The Quality Calculator loads source measures with *evaluation section scores* and *evaluation section counts* for mapped evaluation form sections.

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Multiple source measures for each of the performance data categories listed above can be implemented. For example, both a Time in Research source measure that is mapped to Testing, Research, and Call Back actual activities and a Time in Validation source measure that is mapped to a Validation actual activity can be defined. No changes to the Adherence Measure extract adapter are required.

Once created and mapped, these source measures can be used in KPI formulas in combination with other source measure to create KPIs tailored to your organization's requirements.

> ***Note:*** It is possible to automate the creation of source measures using an XML file. For additional information, please refer to the *Nortel Workforce Management Scorecards Adapters Guide* (NN44480-605).

How Scorecards Uses Source Measure Data

Pre-configured source measures exist for the pre-packaged KPIs and related adapters. You can use these source measures in the custom KPIs you design. In some cases, new source measures can also be created to capture additional performance metrics.

When integration adapters load information into the Scorecard from another application, an ACD, a CRM application, or any other source, the data is loaded into a source measure record in the warehouse database. Loading source measures instead of loading KPIs directly provides an important layer of abstraction, or separation, between the technically oriented integration and the business oriented KPI.

Once loaded, the same source measure can be used in multiple KPIs, and source measures from different source systems can be used in the same KPI. For example, many KPIs in the contact center environment use the Calls Handled source measure in their formulas. Once the Calls Handled Source Measure is loaded from the ACD, it can be combined with a Revenue Source Measure for a Revenue Per Call KPI and used in the Average Handle Time KPI. If there are multiple ACDs in the organization, integration adapters can be deployed for each ACD, but the same Calls Handled source measure is populated for all ACDs. The Scorecards administrator designing KPIs doesn't have to think about which ACD the Source Measure came from; once it is defined and loaded, it is available to be used as needed.

Source Measure Fields And Their Values

The fields in the **Source Measure Details** page are configured when you add or edit a source measure in the system. The information you enter is then shown on the main **Source Measure** screen.

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Name	The name of the source measure
Code	An alpha-numeric string functioning as code used by the adapter developer. The code value must be coordinated with the adapter developer.
Description	A string describing the Source Measure.
Periodicity Aggr Type	The method used to aggregate measures from Daily periodicity to higher periodicities.
Organization Aggr Type	The method used to roll up measures from people to their organization (Average, Sum, Min, Max, Count, Standard Deviation, Standard Deviation P).
Source Measure Type	The type of the measure: Organization or Person.
Source Mapping Type	The mapping of the source measure to either Activity, Other, or Evaluations (if you are licensed for Impact 360 V10 Quality Monitoring). The mapping of activities to source measures is used by the Forecasting and Scheduling and Workforce Optimization Suite adapters. The activity mappings affect person source measures that are used in person KPIs.

Adding/Editing Source Measures

Step	Action
1	Navigate to **System > Scorecards Sources > Source Measures**, and from the **Source Types** list on the left panel, select a source type, such as **WFMS**.
2	If you are editing a source measure, select the source measure from the Source Measure list on the right panel.
3	Do one of the following: • If you are adding a source measure, click **Add Source Measure**. • If you are editing a source measure, click **Edit Source Measure**. The **Source Measures Details** screen opens on the right panel.

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4 Type the source measure's name and code along with a short description.

5 Select the **Periodicity and Organization Aggregation** types. For details on Aggregation Types, see "About Aggregation Types" (page 65).

6 Select the source measure's type: **Organization** or **Person**.

7 Select the source mapping type: **Activity** or **Other**.

For details on the information contained in each field that you complete, see "Source Measure Fields And Their Values" (page 63).

8 Click **Save**. The new source measure is listed.

—End—

For details on aggregation types and adding source measures for Nortel Quality Monitoring, F&S or Adherence, see:

- "About Aggregation Types" (page 65)
- "Source Measures for Nortel Quality Monitoring, Forecasting and Scheduling, or Adherence" (page 62)
- "Managing Source Systems" (page 66)

About Aggregation Types

Each source measure has a periodicity aggregation type and an organization aggregation type defined.

The **Periodicity Aggregation Type** specifies the method used to aggregate measures from daily periodicity to higher periodicities. For example, if a source measure has SUM for its periodicity aggregation type, the source measure for a weekly periodicity will be summed from the daily source measures when used in a KPI formula calculation.

There are two types of aggregation groups available within the Periodicity Aggregation type drop-down choices:

- **Mathematical**: such as Count, Sum, and Average.
- **External**: aggregates data in an external system and then imports the already aggregated data into Scorecards to be used when calculating a KPI.

The **Organization Aggregation Type** specifies the function used to roll up a source measure for organizations at a given periodicity.

For example:

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Consider a source measure that is defined to aggregate organizations using the average function and to use the sum function for periodicity aggregations.

For weekly periodicity, all person source measures in an organization are summed during the week. The sum of each person is averaged to the organization level."

Deleting Source Measures

Step	Action
1	Navigate to **System > Scorecards Sources > Source Measures**, and from the **Source Types** list on the left panel, select a source type, such as **WFMS**.
2	Select the source measure you want to delete.
3	Click **Delete Source Measure**, then click **OK** to confirm. The source measure is deleted.

—End—

Managing Source Systems

Step	Action
1	Navigate to **System > Scorecards Sources > Source Systems**, select a source type, and list, create, edit, and delete source systems as required.

—End—

Each source system listed represents a type of system (usually an external one) from which data, called source measures, is gathered.

Source systems are related to source types, such as a Workforce Optimization Suite System (**WFMS**). A source system in WFMS could be **Forecasting and Scheduling**. The Source System has a name, description, and most importantly, a code. The code is used by external programs to indicate that the data came from that particular source system.

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To be effective, the source system must be associated with source measures. (For details on Source Measures, see "Managing Source Measures" (page 61).

Once you create an association between a source measure and a source system, the concatenated codes are used by external programs to identify that the data came from this particular source system and this source measure. A concatenated code has the following format: Source_System_code#Source_Measure_code.

Each source system and source measure combination defines a unique measure that can be used in a KPI formula.

See:

- "Source System Fields and their Values" (page 67)
- "Adding/Editing a Source System" (page 67)
- "Deleting a Source System" (page 68)

Source System Fields and their Values

The table below describes the fields and their values that you view in the source system list, or fill in when creating or editing a source system.

Name	**The name of the source system.**
Code	An alpha-numeric string functioning as code used by the adapter developer. The code value must be coordinated with the adapter developer.
Description	A string describing the source system.
Source Measures	The method used to aggregate measures from Daily periodicity to higher periodicities.
Data Source	Indicates the data source names that are mapped to the source system.

Adding/Editing a Source System

Step	Action
1	Navigate to **System > Scorecards Sources > Source Systems**, and from the **Source Types** list on the left panel, select a source type, such as **WFMS**.
2	If you are editing a source system, select the source system from the **Source System** screen on the right panel.
3	Do one of the following:

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- If you are adding a source system, click **Create Source System**.
- If you are editing a source system, click **Edit Source System**.

The **Source System Details** screen opens on the right panel.

4 Type the source system's name and code along with a short description.

5 If applicable, select one or more data sources from the drop down **Data Source**list.

6 In the **Source Measures** area, select the source measures you want to assign to the source system from the **Available Source Measures** list, and click the **>>** button to transfer the source measures to the **Assigned Source Measures** list.

Note: The concatenated codes of the source system and source measure pairs must be unique.

7 Click **Save**. The new or edited source system displays on the **Source System** screen.

—End—

Deleting a Source System

Step	Action
1	Navigate to **System > Scorecards Sources > Source Systems**, and from the **Source Types** list on the left panel, select a source type, such as **WFMS**.
2	Select the source system you want to delete.
3	Click **Delete Source System**, then click **OK** to confirm. The source system is deleted.

—End—

Working With Source Codes

A source code represents a concatenation of source system and source measure codes. The source code has to be activated to enable its use in a KPI formula.

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Step	Action
1	To view source codes for installed adapters or to activate the source codes for adapters that are not yet installed, navigate to **System > Scorecards Sources > Source Codes**. The **Source Code** screen on the right panel lists the Source System, Source Measure associated with each code, the code's name, and whether the code is active or not.

—End—

For details on activating or deactivating a source code, see "Activating or Deactivating a Source Code" (page 69).

Activating or Deactivating a Source Code

Step	Action
1	Navigate to **System > Scorecards Sources > Source Codes**, and from the **Source Types** list on the left panel, select a source type, such as **WFMS**. The **Source Code** screen on the right panel lists all the codes that are associated with the source type.
2	To activate or deactivate a source code, select it from the **Source Code** screen, and click **Edit Source Code**. The **Source Code Details** screen opens on the right panel.
3	Do one of the following: • If you are activating a source code, check the **Active** check box. • If you are deactivating a source code, clear the **Active** check box.
4	Click **Save**.

—End—

Managing Scorecards Source Mappings

Source mappings are internal entities mapped to one or more external entities.

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Step	Action
1	You can view and edit various types of source mappings by navigating to **System>Scorecard Sources>Source Mappings**, and selecting a source type, such as **WFMS** or **Quality Management System**.
2	On the **Source Mappings** screen, all Source Mappings associated with the Source Type you selected are displayed. For details on the fields shown on the **Source Mappings** screen, see: "Configuring Source Mappings in the Web Application" (page 72).
3	From this screen, you can configure source mappings by either adding IDs in a **Foreign ID** text box for **Organization** or **Other** type Source Mappings, or by clicking **Edit**. For details on Source Mapping fields, Source Mappings, see: • "Source Mapping Types and Their Configuration" (page 71) • "Configuring Source Mappings in the Web Application" (page 72) • "About Mapping Activity Settings for Scorecards using the Forecasting and Scheduling Application" (page 75)

—End—

Source Mapping Fields and Their Values

The **Source Mapping** screen displays the following information, which you can edit for selected source mappings:

Field	Value
Source System	The name of the source system
Internal Name	The name of the internal entity (organization or source measure) that you would like to map to an external entity.
Internal ID	The ID of the internal entity.
Foreign ID*	The ID's of external entities separated by commas—these IDs are mapped to the internal entity. You use these IDs when configuring Source Mappings of type **Organization** and **Other**
Type	The type of source mapping—**Activity**, **Core Activity**, **Organization**, **Other**, or **Evaluations** (if you are licensed for Impact 360 V10 Quality Monitoring).

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Note: * The **Foreign ID** field is typically used when mapping the Quality Management System source type. An example for Foreign ID is: Site1\ Standard Form \ Section1 \ TotalEvalScore. See the *Quality Calculator Adapter Guide*for details.

Source Mapping Types and Their Configuration

In general, source mappings are configured during installation, however additional mappings may be required in the following situations:

- When a new activity, organization, or queue is added.
- When Scorecards integrates with the Speech Analytics system
- When you want to include Impact 360 V10 Quality Monitoring (license required) performance metrics on the Scorecard

How you configure Source Mappings depends on the type of Source Mapping - for example, **Activity** - you plan to configure. The table below describes each type of source mapping, and their required configuration procedures:

There are several source mapping types, which are detailed in the table below.

Source Mapping Type	Internal Entity	External Entities	Configuration Procedure
1. Activity (only under Source Systems)	Internal Source Measure	Various Workforce Management application Activities.	1. On the **Source Mappings** screen, select a source mapping that indicates **Activity** under the **Type** header. 2. See detailed procedure here:"Configuring Source Mappings in the Web Application" (page 72).
2. Core Activity (Only under Source Systems. This mapping cannot be edited, and can only be set using the Director Enterprise client.)	Predefined Internal Source Measure (usually indicating non-working activities).	Various Workforce Management application activities. Each activity can be mapped to only one of the predefined source measures.	N/A

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Source Mapping Type	Internal Entity	External Entities	Configuration Procedure
3. Organization (Excluding Forecasting and Scheduling and Activity Manager Source Systems.)	Internal Organization	External activities, such as queues. These are indicated by IDs, separated by commas.	1. On the **Source Mappings** screen, select a source mapping that indicates **Organization** under the **Type** header. 2. In the **Foreign ID** text box, type one or more External IDs, separated by commas.
4. Other	Internal Source Measure.	External Source Measures.	1. On the **Source Mappings** screen, select a source mapping that indicates **Other** under the **Type** header. 2. In the **Foreign ID** text box, type one or more External Source Measures IDs, separated by commas.

ATTENTION

If you enter custom mapping strings in the **Foreign ID** text box on the **Source Mappings** tab, for such source mapping types as **Other** and **Organization**, make sure you created a custom adapter for the mappings. If using a prepackaged adapter that imports canned source measures, do not map canned source measures to Foreign IDs.

Configuring Source Mappings in the Web Application

Step	Action
1	Navigate to **System > Scorecards Sources > Source Mappings** and, in the left panel, select the appropriate source type for the source mapping you want to configure. The **Source Mappings** screen opens, and displays the list of source mappings associated with the source type you selected.

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2 Depending on the type of source mapping you configure, complete one of the following procedures:

- "Configuring an Activity source mapping type" (page 73)
- "Adding External IDs to an Organization source mapping type" (page 74)
- "Adding External Source Measures IDs to an Other source mapping type" (page 74)
- "Adding Nortel Quality Monitoring custom source mappings" (page 75)
- "About Mapping Activity Settings for Scorecards using the Forecasting and Scheduling Application" (page 75)

—End—

Configuring an Activity source mapping type

Step	Action
1	From the **Source Mapping** list, select a source mapping of type **Activity**, and click the **Edit** button. The **Source Mapping Details** screen opens.
2	In the **Activities** area, select items from the **Activities Available** list on the left panel (you can select multiple rows by holding the Ctrl key).
3	Click the >> arrow button to move the items you selected to the **Activities Assigned** list.
4	Click **Save**.

—End—

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Adding External IDs to an Organization source mapping type

ATTENTION

If you enter custom mapping strings in the **Foreign ID** text box on the **Source Mappings** tab, for such source mapping types as **Other** and **Organization**, make sure you created a custom adapter for the mappings. If using a prepackaged adapter that imports canned source measures, do not map canned source measures to Foreign IDs.

Step	Action
1	From the **Source Mappings** list, select a Source Mapping of type **Organization**.
2	Fill in the Foreign ID field with one or more External IDs, separated by commas.

—End—

Adding External Source Measures IDs to an Other source mapping type

Note: If your company purchased a Nortel Quality Monitoring license, map external source measures to internal source measures for QM Evaluations Source Measure types, using this procedure.

ATTENTION

If you enter custom mapping strings in the **Foreign ID** text box on the **Sources Mappings** tab, for such source mapping types as **Other** and **Organization**, make sure you created a custom adapter for the mappings. If using a prepackaged adapter that imports canned source measures, do not map canned source measures to Foreign IDs.

Step	Action
1	Select a Source Type in the left pane.
2	Select a source mapping of type **Other**.
3	Fill in the **Foreign ID** field with one or more External Source Measures IDs, separated by commas.

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4	Do not map canned source measures to Foreign IDs unless you created a custom adapter instead of using a prepackaged adapter to import the canned source measures. ***Note:*** Do not map canned source measures to Foreign IDs unless you created a custom adapter instead of using a prepackaged adapter to import the canned source measures.

—End—

Adding Nortel Quality Monitoring custom source mappings

- If your company purchased a Nortel Quality Monitoring license, navigate to **System > Scorecards Sources > Source Mappings** and, from the **Source Type** list, select **Quality Monitoring**.
- To map external source measures to internal source measures for QM Evaluations Source Measure types, use the procedure associated with Source Mapping Type **4. Other**. See "Adding External Source Measures IDs to an Other source mapping type" (page 74).

About Mapping Activity Settings for Scorecards using the Forecasting and Scheduling Application

Activities in the Forecasting and Scheduling application can be mapped to activity categories (Source Measures). These mappings can only be edited in the Forecasting and Scheduling application's **Activities** module.

They are then read-only in the web application, and can be viewed on the **Source Mappings** tab, when you select the **WFMS** source type.

Note: Note that if you want to edit Forecasting and Scheduling queue mappings, they can be edited in the web application, by navigating to **System > Scorecards Sources > F&S Queue Mappings**. For details, see "About Automatic and Manual Queue Mapping" (page 77).

Mapping a Forecasting and Scheduling activity to a source measure in Forecasting and Scheduling

Step	Action
1	In the Forecasting and Scheduling application, open the **Activity Details** dialog box in the **Activities** module by double-clicking the activity.

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2 From the **Scorecards Usage** drop down box, select which Source Measure the activity should count towards in Advanced Scorecards.

Note 1: **Time in Admin**, **Time in Breaks**, and **Time in Training** Source Measures are used in KPIs. Activities marked as **Time-Off** are used in the **Time in Time-Off** Source Measure (not listed). The Scorecards Usage section area is grayed out when an activity is marked as **Time Off**. Activities mapped to **None as a** Source Measure are used in the **Time in Work** Source Measure. If you do not want to include time spent in a certain activity to any KPIs, map it to the **Time in Other** Source Measure. All customer-work activities should be mapped to **None**, all **Time Off** activities have Scorecards Usage grayed out and count as **Time in Time-Off**, and all other activities should be mapped to one of the other source measures.

Note 2: For more details on using the Forecasting and Scheduling application, see the *Nortel Workforce Management Schedulers' Guide* (NN44480-114).

—End—

Forecasting and Scheduling Queue Mapping

Forecasting and Scheduling queues can be mapped to an organization manually or automatically, using the web application.

These mappings are required to relate queue data originating from ACDs and the Forecasting and Scheduling Scheduler, to organizations.

Although queues within Forecasting and Scheduling are mapped to campaigns, the concept of campaigns is not used in Scorecards. Instead, when adding activities, organizations and/or queues, you must map all relevant queues to the appropriate organizations so that the queue data can be aggregated meaningfully in Organizational KPIs. Any combination of data is a weighted average.

Note 1: It is crucial that no data in the **Source Measures**, **Source Systems**, and **Source Codes** tabs be changed unnecessarily. The only tasks you might need to perform in the **Scorecards Sources** section are on the **F&A Queue Mappings** tab.

Note 2: Forecasting and Scheduling source mappings that are displayed on the **Source Mappings** tab in the web application can only be changed in the Forecasting and Scheduling application's **Activities** module. For details, see "About Mapping Activity Settings for Scorecards using the Forecasting and Scheduling Application" (page 75).

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To display the list of Forecasting and Scheduling queue mappings in the web application, navigate to **System > Scorecards Sources > F&S Queue Mappings**.

On the **F&S Queue Mappings** tab, each row represents a mapping between one organization and one or more queues:

Field	Description
Organization Name	The name of the organization you would like to map to queues.
Queues	The names of queues, separated by commas.
Type	The type of queue mapping: **Automatic** or **Manual**.

From this tab, mappings between organizations and queues can be configured manually, or set to automatic.

For details on manual and automatic queue mapping, see:

- "About Automatic and Manual Queue Mapping" (page 77)
- "To set automatic queue mapping for one or more organizations" (page 78)
- "To manually map queues to organizations" (page 79)

About Automatic and Manual Queue Mapping

You can map Forecasting and Scheduling queues to organizations manually or automatically. The **F&S Queue Mappings** tab shows how queues are mapped to organizations which are to be used in organizational KPIs, such as **Service Level**.

You may set organizations that are used in campaigns to be mapped automatically, while parent organizations that are not used in campaigns are mapped manually.

See:

- "Automatic Queue Mapping" (page 77)
- "Manual Queue Mapping" (page 79)

Automatic Queue Mapping

In Automatic Queue Mapping, Scorecards automatically maps the queues in each campaign to the organizations in that campaign that handle calls on that queue. If a queue later is moved to a different campaign, the mapping will be updated.

Automatic Queue Mapping is date dependent, since the campaigns in which the organization is participating might change from week to week.

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In a non-skill-based campaign, all queues are mapped to all organizations that belong to the campaign. In a skill-based campaign, queues are mapped to each organization where at least one agent has the skills for that queue. If none of the employees in an organization have the skills to work on a particular queue, then that queue does not get mapped to that organization.

For example: Consider a skilled campaign in which there are two queues -Queue1 linked to Spanish skill, and Queue2 linked to English skill. OrgA and OrgB are linked to this campaign. In OrgA, most employees speak both Spanish and English, while in OrgB all employees speak only English.

Automatic mapping does the following:

- OrgA mapped to: Queue1 and Queue2
- OrgB mapped to: Queue2 (it won't be linked to Queue1 since nobody speaks Spanish in this organization)

In this case, you would probably want to use automatic mapping since it does the work for you. However, if OrgA agents were primarily responsible for Spanish calls and only a few were skilled for English, you might want OrgA to be mapped only to Queue1, in which case you would need to manually map the queues..

"To set automatic queue mapping for one or more organizations" (page 78)

Note: Reserve skills are ignored in automatic mapping.

To set automatic queue mapping for one or more organizations

Step	Action
1	Navigate to **System > Scorecards Sources > F&S Queue Mapping**.
2	If you want to filter organizations, use the organization filter button above the queue mappings list.
3	Select the organizations (multi-select by holding the <Ctrl> key while selecting) that you want to use in the mapping.
4	Click the **Set Automatic** button. ***Note:*** If set to Automatic Mapping, the Queues column does not show the updated list until the page has been refreshed. Additionally, the mapping only shows when the date is set in a week where queues have been linked to campaigns.

—End—

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Manual Queue Mapping

If a campaign is linked to many organizations and many queues, but certain organizations are primarily responsible for certain queues, you may need to manually map the queues to organizations, since many queues may be mapped to many organizations.

Manually map the queues only to the organizations that are primarily responsible for those queues.

Unlike automatic queue mapping, manual mapping does not roll up or down the organizational hierarchy, so queues may be mapped to multiple organizations for which their data should be included in KPI measurements.

Manual mapping is fixed (unless you change it) and is not related to the selected date.

To manually map queues to organizations

Step	Action
1	Navigate to **System > Scorecards Sources > F&S Queue Mapping**.
2	If you want to filter organizations, use the organization filter button above the queue mappings list.
3	Select the organization(s) for which you want to map a queue or group of queues (multi-select by holding the **Ctrl** key while selecting).
4	Click the **Edit Mapping** button. The **Queue Mapping Details** window opens.
5	From the **Queues Available** list, select the queue(s) that you wish to map to the selected organization(s).
6	Click **>>.** The queues you selected appear in the **Queues Assigned** list.
7	Click **Save**. ***Note:*** If multiple organizations are selected, the Queues Assigned list is initially be empty. If a single organization is selected, the Queues Assigned list includes all queues already mapped to the selected organization. If you manually edit the organizations for queue mapping, the mappings persist until they are manually edited again or set to automatic mapping, regardless of whether queues or organizations have been added, deleted or have changed campaigns.

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—End—

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Configuring the Scorecards Setup

This chapter provides describes how to configure Scorecards for KPI, goal setting, and other calculations, using the web application's **App Admin** module. A description of system administration general and Scorecards settings is also described.

This chapter contains the following main topics:

- "Managing Scorecards Setup" (page 81)
- "Working With KPIs" (page 82)
- "Managing Objectives" (page 102)
- "Editing KPI Goals (Advanced Scorecards)" (page 106)
- "Goal Adjustments/Reductions" (page 109)
- "Configuring Scorecards Settings" (page 112)
- "Configuring General System Settings" (page 114)

Managing Scorecards Setup

The Scorecards application is installed and initially configured at your site by a trained Application Consultant.

Once changes required to Scorecards data sources have been made (see "Working with Scorecards Sources" (page 59)), you can then set up Scorecards to meet the changing needs of performance management in your organization by using the **Scorecards Setup** tab in the **App Admin** module.

With the appropriate roles and privileges, you can complete the following tasks from **Scorecards Setup** tab:

- import, export, copy, edit, and create KPIs
- set KPI objectives and goals
- adjust for goal reductions
- set default Scorecards settings
- purge KPI values

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Note: For more details on roles and privileges, see Chapter 2, "Working with Roles and Privileges" (page 25).

For details on the task workflow for setting up Scorecards, see "Scorecards Setup Workflow" (page 82).

Scorecards Setup Workflow

The task work flow to enable you to successfully set up Scorecards is as follows:

Step	Action
1	Import KPIs to the desired organization. See "Working With KPIs" (page 82).
2	Edit KPI settings as needed. See "About Creating or Editing KPI Settings" (page 86).
3	Define Objectives and link KPIs. See, "Managing Objectives" (page 102).
4	Assign weights to KPIs in each Objective. See "Editing KPI Weights for Objectives" (page 104).
5	Edit KPI Goals (Advanced Scorecards Only). See "Editing KPI Goals (Advanced Scorecards)" (page 106).
6	Configure Goal Adjustments/Reductions. See "Goal Adjustments/Reductions" (page 109).
7	Configure Scorecards Settings. See "Configuring Scorecards Settings" (page 112).

—End—

Working With KPIs

Key Performance Indicators (KPIs) are metrics used to report on performance of individuals or groups of individuals.

KPIs are scored to provide employees feedback on progress in meeting their organization's strategic objectives. Each KPI has a formula that is used to calculate the KPI's actual result. The formula defines which source measures are the building stones of the KPI and which mathematical operations should be applied to them.

Note: Source measures are extracted from external source system types such as automatic call distributors (ACDs), and Workforce

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Management systems (WFMS). For details on Source Measures, see "Working with Scorecards Sources" (page 59).

Step	Action

1 To set up KPIs, navigate to **App Admin > Scorecards Setup** to view the **KPIs** screen.

2 The **KPIs** screen displays a series of columns, with the following information:

Column	Description
Name	The name of the KPI
Description	Describes the KPI
Owner Organization	The organization to which the KPI belongs. A KPI can be defined in a higher-level organization and set to apply to sub organizations. The owner organization is the organization in which the KPI was created.
KPI Type	Person or Organization. A Person KPI applies to employees. An Organization KPI applies to organizations.
Calculate rollup KPIs	**Yes/No**. Specifies if the KPI rolls up to organization level or to both organization and supervisor level.
Apply to Sub-Orgs	**Yes/No**. Specifies if this KPI applies only to the organization selected in the left pane or to its sub organizations as well.

3 From this screen, you can also import, export, copy, edit, create, delete, and purge KPIs.

See:

- "Exporting KPIs" (page 84)
- "Importing KPIs" (page 84)
- "Copying a KPI to another organization" (page 86)
- "About Creating or Editing KPI Settings" (page 86)
- "Deleting a KPI" (page 101)
- "Purging a KPI" (page 101)

—End—

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Exporting KPIs

Step	Action
1	Navigate to **App Admin > Scorecards Setup** to open the **KPIs** screen and, on the left pane, select the organization for which you want to import a KPI.
2	Select the KPI(s) you want to export.
3	Click the **Export KPI** button. If the export succeeds, the message **KPI Export Succeeded** appears at the top of the screen.
4	The exported KPI is saved in the Scorecards database. It can be retrieved using the **Import KPI** button.

—End—

Importing KPIs

KPIs flow down the organizational hierarchy. If you import and edit a KPI at the highest level organization, it is available at the lower level organizations.

If you are using Advanced Scorecards, you can also backdate goal changes for KPIs. See "Back-dating Goal Changes (Advanced Scorecards Only)" (page 85).

If you are also licensed to use Quality Monitoring Version 10 or Quality Monitoring Version 7.8.x, you can also import KPIs related to those systems. See "Importing KPIs Related to Impact 360 Version 10" (page 86) and "Importing KPIs Related to Quality Monitoring Version 7.8.x" (page 85).

See also:

- "Back-dating Goal Changes (Advanced Scorecards Only)" (page 85)
- "Importing KPIs Related to Quality Monitoring Version 7.8.x" (page 85)
- "Importing KPIs Related to Impact 360 Version 10" (page 86)

To import a KPI

Step	Action
1	Navigate to **App Admin > Scorecards Setup** to open the **KPIs** screen and, on the left pane, select the organization for which you want to import a KPI.

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2 Click **Import KPI**. The **KPIs to import** screen opens on the right panel.

Note: In the **KPIs to import** screen, the **Category** column lists KPIs by groups such as **Agent Performance** and **Activity & Adherence**. These categories enable KPIs to be imported by groups and are predefined for pre-packaged KPIs. New KPIs would automatically could fall into the category **User Defined**.

3 From the right panel, select the KPIs that you want to import.

4 Click **Load**.

Note: Only import those KPIs that are relevant to your configuration. For example, if you are not using Adherence functions, do not import adherence-related KPIs; if you calculate average handling time (AHT) with hold time, import the KPI AHT (including Hold Time), but not AHT.
If you wish to import the same KPI more than once, it must have a unique name. An example would be to import Organization Average Handle Time twice, naming it Eastern Division AHT and then Western Division AHT.

—End—

Back-dating Goal Changes (Advanced Scorecards Only)

KPIs are imported with default goals and are typically calculated for one or more prior days. When you update a KPI goal you cannot see a change on the scorecard until the second day. The default goal is stuck on the day the KPI was initially loaded.

This goal change and back-effective date sets a flag that tells the calc engine to recalculate the affected KPI for the dates covered by the back date. If you attempt to enter a back date more than five days prior to the current date you will not see flag but a warning: **The maximum back date range of 5 days has been exceeded. The calculation engine must be run manually to recalculate KPIs for these dates**.

Importing KPIs Related to Quality Monitoring Version 7.8.x

The following source measures can be imported from Quality Monitoring Version 7.8.x to create Scorecard KPIs:

- % Recorded Agent Contacts
- % Reviewed Agent Contacts
- Agent Evaluation Coverage

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- Total Average Quality Score

Importing KPIs Related to Impact 360 Version 10

The following KPI can be imported from Impact 360 Version 10:

- Total Average Quality Score

Note: For details on integrating Impact 360 Version 10 and Scorecards in order to import KPIs, see Appendix "Integrating and Synchronizing Scorecards with Other Systems" (page 139).

Copying a KPI to another organization

Step	Action
1	Navigate to **App Admin > Scorecards Setup** to open the **KPIs** screen and, on the left pane, select the organization to which the KPI you want to copy belongs.
2	Click **Copy KPI**. The **Copy KPI** pop-up dialog opens.
3	In the pop-up window, select the organization(s) to which you want to copy the KPI.
4	Click **Copy to Selected Organization(s)**. The message **Copied Successfully: *[org name(s)]*** appears at the top of the pop-up window.
5	Click **Done** to close the pop-up dialog. ***Note 1:*** Any copied KPIs become new KPIs in their own right. Any modifications to the original KPI will not be reflected in the copied KPIs, and modifications to the copies will not reflect in the original KPI. ***Note 2:*** To create KPIs you need to have the license for KPI Design.

—End—

About Creating or Editing KPI Settings

Using the **Scorecards Setup** tab in the **App Admin** module, you can:

- create KPIs, and edit most parameters, if you have the KPI Design license

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- edit most parameters with existing KPIs if you have an Advanced Scorecards license. You can also copy, import, export, delete and purge KPIs.
- edit a limited number of parameters if you have a Basic Scorecards license. You can also copy, import, export, delete and purge KPIs.



WARNING
If you are making changes to KPIs, do so with caution. Changes to some fields may have a serious impact on Scorecard's performance. Contact our technical support for assistance.

See:

- "Which KPI Parameters Can Be Edited?" (page 87)
- "Creating or Editing a KPI" (page 91)

Which KPI Parameters Can Be Edited?

When you navigate to **App Admin > Scorecards Setup**, and click the **Create KPI** option (if you have a KPI design license) or the **Edit KPI** option for an existing KPI, the **KPI Details** form opens with long list of parameters/attributes (described in detail under "Completing the KPI Details form" (page 92)).

These parameters/attributes may be modifiable, depending on your Scorecards license, and whether or not received KPI data has locked some of them.

This section describes your ability to configure KPI parameters/attributes under the following circumstances:

- "If you have a Basic Scorecards license" (page 87)
- "If you have an Advanced Scorecards license" (page 88)
- "If you have a KPI Design license" (page 90)
- "If KPI Attributes are locked after KPI data has been received" (page 90)

If you have a Basic Scorecards license

If your organization has a license for Basic Scorecards only, there are only a limited number of fields you can change when you are editing a KPI on the **KPI Details** form, the other parameters are fixed. You cannot create new KPIs.

The fields you can change are:

- **General**
  - Name

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  - Description
  - Apply to Sub-Orgs
- **Display Format**
  - Precision
- **Effectivity**
  - Start Date
  - End Date (if you click **Terminate** on the **KPI Details** form)

For full details on working with these parameters, see "Completing the KPI Details form" (page 92).

If you have an Advanced Scorecards license

If your organization has a license for Advanced Scorecards, you cannot create KPIs but you can edit most parameters on the **KPI Details** form.

Note: Once KPI data is received, some parameters can no longer be modified at all. For details, see "If KPI Attributes are locked after KPI data has been received" (page 90).

These are the parameters you cannot edit:

- **General**
  - Variance to Planned
  - Variance Type
  - Enabled for Goal Reduction
- **Periods and Limits**
  - Periodicities
- **Formula**
  - Formula
  - Modify
- **Display Format**
  - Format

These are the parameters you can edit:

- **General**
  - Name: Name of the KPI

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  - Description: Description of the KPI
  - Calculate Roll Up KPIs
  - Goal Roll UP
  - Score is Based On [Actual Value or Peer Value]
  - Upper Variance
  - Lower Variance
  - Show in Period to Date Scorecards

- **Periods and Limits**
  - Upper and Lower Limits
- **Display Format**
  - Precision
- **Effectivity**
  - Start Date
  - End Date (if you click **Terminate** on the **KPI Details** form)
- **Drill Through**
  - Adherence
- **Role Scope**
  - List of roles which can be select to see KPIs in a scorecard
- **Peer Benchmarking**
  - Peer Type
  - Peer Group:
- **Peer Organization**
- **Enable Drilldown**
- **Peer Drilldown Depth Type**
- **Peer Drilldown Depth Number**
- Display Name
- Display Actual
- Display Peer
- Display Goal

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- Display Job Title
- Display Organization
- Display Score

For full details on working with these parameters, see "Completing the KPI Details form" (page 92).

If you have a KPI Design license

If you have a KPI Design license you can create KPIs and edit all parameters/ attributes, until KPI data is received.

For details on which parameters/attributes you cannot edit once KPI data is received, see"If KPI Attributes are locked after KPI data has been received" (page 90).

If KPI Attributes are locked after KPI data has been received

Once KPI data has been received, you can no longer edit the following KPI parameters/attributes, regardless of whether you have a Basic or Advanced Scorecards license, or a KPI Design license:

- **General**
  - Calculate Roll up KPIs
  - Goal Roll up
  - Variance to Planned
  - Variance Type
  - Upper Variance
  - Lower Variance
- **Periods and Limits**
  - Upper/Lower Values
- **Formula**
  - Formula
  - Modify
- **Effectivity**
  - Start Date
- **Peer Benchmarking**
  - [Any parameters/attributes]

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Creating or Editing a KPI

Whether you create or edit a KPI, you use the same KPI Details form to make changes.

Note: You can only create a KPI if you have a KPI Design license.

Editable parameters depend on the type of Scorecards license your organization purchased. For details, see "Which KPI Parameters Can Be Edited?" (page 87).

You can also terminate KPIs using the **KPI Details** form.

To create or edit a KPI:

Step	Action
1	Navigate to **App Admin > Scorecards Setup** to open the **KPIs** screen and, on the left pane, select the organization for which you are creating or editing a KPI.
2	To create or edit a KPI, do one of the following: • If you are editing an existing KPI, select the KPI and click **Edit KPI**. • If you are creating a new KPI, click **Create KPI**. The **KPI Details** form opens on the right panel.
3	Complete the fields necessary to configure your KPI (for details, see "Completing the KPI Details form" (page 92)).
4	Click **Save** when you finish.

—End—

See:

- "About Creating or Editing KPI Settings" (page 86)
- "Which KPI Parameters Can Be Edited?" (page 87)
- "Completing the KPI Details form" (page 92)
- "Terminating KPIs" (page 100)
- "Deleting a KPI" (page 101)
- "Purging a KPI" (page 101)

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Completing the KPI Details form

The **KPI Details** screen contains seven sections, each with fields you can use to configure the KPI.

For details on how to access and use the KPI Details form, see "Creating or Editing a KPI" (page 91)

For details on which fields/parameters you can modify in the form, see "Which KPI Parameters Can Be Edited?" (page 87).

For the full list of fields/parameters, see below:

- "General Section" (page 92)
- "Periods and Limits" (page 95)
- "Formula" (page 96)
- "Display Format" (page 97)
- "Effectivity" (page 98)
- "Drill Through" (page 98)
- "Role Scope" (page 99)
- "Peer Benchmarking" (page 99)

General Section

General Section

Item	Description
Organization Name	Name of the organization to which the KPI is assigned.
Name	Name of the KPI.
Description	Description of the KPI.
KPI Type	Choices are **Person** or **Organization**. Agents see their own results for a Person KPI type. An Organization KPI type applies to the organization and can be viewed on an Organization Scorecard.

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Item	Description
• Calculate Roll Up KPIs	• Check this box to make the KPI roll up to organization level or to both supervisor level and organization level. Organization Roll Ups can be viewed in the Organization Scorecard and My Scorecards. • Supervisor Roll Ups can be viewed in Employee Scorecards and My Scorecards. ***Note:*** The roll-up operation depends on the **Enable Supervisor Rollup** Scorecards parameter, which is set on the **General Settings** page on the **Administration** tab in the **System** module: • When you check the Enable Supervisor Rollup option, the KPI is rolled up to both the organization and the supervisor level. • When you uncheck the Enable Supervisor Rollup option, the KPI is rolled up to the organization level. For details on setting General Administration options in the System module, see "Configuring General System Settings" (page 114).
Goal Roll Up	Check this box to make the KPI roll up goals. If a KPI is defined to roll-up to the organization, checking this option will also roll up the agent's goals to the organization level. ***Note:*** The **Goal Roll Up** check box is only enabled if you check the **Calculate Roll-up KPIs** option (above).
Score is based on	Choices are **Actual Value** and **Peer Value**. You can calculate scores based on actual value or peer value. The selection cannot be changed after the KPI is calculated. If the **Peer Value** calculation type is selected, only **Percentile** and **Rank** values are available for **Peer Type** (see "Peer Benchmarking" (page 99) for Peer Type).

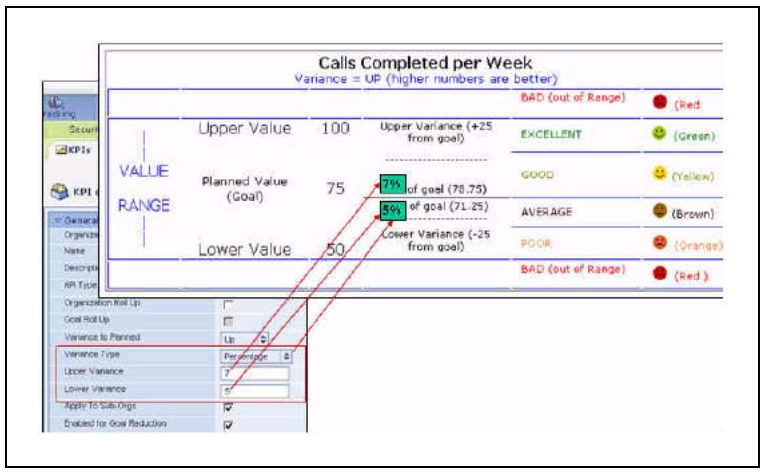
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Item	Description
Variance to Planned	Choices are **Up** and **Down**. These buttons set the direction of “good” scores. If the variance is set to **Up**, higher scores are better. If the variance is set to **Down**, lower scores are better.
Variance Type	Choices are **Percentage** or **Value**. For details on variance, see "Scoring Thresholds Configuration" (page 94).
Upper Variance	Sets the upper tolerance for determining how the KPI is scored. You can set the upper variance from 0 to 100%, if the variance type is **Percentage**. If the variance type is **Value**, you can set the upper variance with a positive floating point or integer number.
Lower Variance	Sets the lower tolerance for determining how the KPI is scored. You can set the lower variance from 0 to 100%, if the variance type is **Percentage**. If the variance type is **Value**, you can set the lower variance with a positive floating point or integer number.
Apply to Sub-Orgs	Apply this KPI to sub-organizations. Once this attribute is set and the KPI is saved, it is not possible to unset this option.
Enabled for Goal Reduction	If checked, this KPI will be affected by goal reductions assigned to agents/organizations. If unchecked, the KPI will not be affected by goal reduction. KPIs with accumulative Source Measures in their formula usually have this checked. KPIs with average Source Measures in their formula usually would not have this checked.
Show in period to date scorecard	If checked, this KPI will show up in a Period to Date scorecard. Period to Date scorecards allow access to weekly and monthly scores before the completion of the time period. KPIs that use source measures that are loaded on a weekly or monthly basis (and not daily) will not work with the period-to-date feature.

Scoring Thresholds Configuration

KPI configuration has flexible scoring thresholds, which enable you to enter an upper and lower variance number and select a percentage based variance or a value based variance type.

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You can enter an upper and lower variance number and select a percentage based variance or a value based variance type. The KPI definition page has with three fields for this:

- Variance Type [percentage | value]
- Upper Variance [n]
- Lower Variance [n]

For Adherence the goal is excellence, so any percentage over 92 is excellent. Percentage from 85 to 92 are considered average. Anything below 60 or above 100 is an error.

The admin would configure:

- Variance Type [value]
- Upper Variance [0]
- Lower Variance [7]

If goals varied across organizations you could use a percentage variance, but still set the upper variance to 0 to achieve the same result.

In many contact centers achieving the goal is considered excellent, so the ability to set the upper variance to 0 is useful.

Periods and Limits

The **Period and Limits** area of the **KPI Details** form consists of checkboxes for periods and numeric fields. The Periods checkboxes allow you to select the desired periods (**Daily**, **Weekly**, **Monthly**, **Quarterly**, **Annually**) for the KPI. You can set upper and lower limits for each periodicity of the KPI, and you can use up to seven digits, including the decimal point.

Click the check box under **Active** for each periodicity you want to use.

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Many KPIs have different limits based on whether you are looking at a weekly or daily score. You could consider these values the control limits for results. Note that out of control data always results in a “bad” score.

You can only change **Upper** and **Lower** limits, not the Periodicities.

Formula

The **Formula** area of the **KPI Details** form contains two sections: the Formula field, and the **Modify** area that contains the **Formula** button.

See:

- "Formula Field" (page 96)
- "Creating Formulas" (page 96)

Formula Field

The **Formula** field for an existing KPI is a read-only field that shows the contents of the current formula used to create this KPI. A formula is a valid arithmetic expression and can include numerals, arithmetic operators, mathematical functions, and parentheses. A formula used in a KPI can include numerals and predefined items such as source measures and other KPIs.

Here is an example of a KPI using other KPIs in a formula. Given two existing KPIs, **Total Cases** and **Cost Per Case**, you can create a new KPI called Total Cost by multiplying the two. The formula window would show:

Total Cases*Cost Per Case

Creating Formulas

Note: When you create a formula, you can use numerals, arithmetic operators, mathematical functions, and parentheses. You can enter values only by selecting them from the dialog box with the mouse. Mathematical functions, such as absolute value (ABS) or the square root (SQRT) of a given expression, can be used, as well as predefined items such as a source measure (data taken from a source system) and other KPIs.

These are combined together using arithmetic operators (add, subtract, multiply and divide), mathematical functions (absolute value, square root, etc.) and parentheses ( ) to form a valid arithmetic expression used to define the new KPI.

An NullAsZero() function is also included to allow users to convert null Source Measures to 0 in KPI Formulas as needed. This enables the user to handle nulls per Source Measure and KPI, rather than relying on the global ’treat null as zero’ capability.

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Step	Action
1	To create a formula, click the **Formula** button next to **Modify** to open the **Formula Generator** pop-up dialog.
2	As required, select the **KPI Organization Filter**, **KPI**, **Source Measure** and **Mathematical Function** from their respective drop-down list boxes, to include them in the formula. Some notes on these: • **KPI, Source Measure**: Source measure and/or an existing KPIs can be used to create the formula. Click beside the **Source Measure** and/or KPI boxes and select an item from the drop-down list. • **Mathematical Function**: Mathematical function can be used to create the formula. Click beside **Mathematical Functions** and select a function from the drop-down list. The function is added to the formula followed by a left parenthesis. After supplying the function argument, you should add a closing right parenthesis.
3	Using the keys on the dialog box, compose a valid arithmetic formula that represents your KPI. Monitor the formula in the Formula field in the KPIs tab.
4	Click **Save** to save the data or click **Cancel** to discard the data and return to the previous screen. ***Note:*** To discard the current formula and start over, click **Clear** to erase the entire Formula text field. To erase the last value you entered, click **Backspace** in the dialog box.

—End—

Display Format

Step	Action
1	To configure how Actual and Goal values appear on the screen, scroll down to the **Display Format** area of the **KPI Details** form.

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2 Click beside **Format** to select the format for how the **Actual** and **Goal** values are displayed in the Scorecard. Supported formats are: **Number**, **Currency**, **Time**, and **%.**

Note: The type of currency can be selected from the **General Setup** screen under **System > Administration**.

3 To set the number of decimal positions to display in the Scorecard, type a number between 0 and 9 inside the **Precision** box.

—End—

Effectivity

Step	Action

1 To configure the date from which the KPI is effective, scroll down to the **Effectivity** area.

2 Click the calendar icon beside the **Start** box, and select the date from which the KPI is effective.

3 If you want to define the date the KPI was terminated, or define a future date when you would like to have it terminated, do the following:

1. Click the **Terminate** button at the bottom of the **KPI Details** screen. An **End Date** box appears in the **Effectivity** area.
2. Click the calendar icon beside the **End Data** box, and select the KPI termination date.

For more details on KPI termination, see "Terminating KPIs" (page 100).

—End—

Drill Through

To enable or disable drill through for a KPI, navigate to the **Drill Through** area of the **KPI Details** form, and check or uncheck the appropriate check box.

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Role Scope

To specify which roles have permissions to view the KPI, navigate to the **Role Scope** area of the **KPI Details** form, and click the check boxes beside the appropriate roles.

Peer Benchmarking

Peer statistics are a comparison of KPI actual values for employees in a "peer group". This is the Leaderboard.

To modify these items, navigate to the **Peer Benchmarking** area of the **KPI Details** form. The table below describes each item you can modify.

Item	Description
Peer Type	Allows you to choose the type of calculation to be performed. Choices include: Percentile; Rank; Median; Mode; Mean; None. (None allows you to disable peer benchmarking for the selected KPI if it was previously enabled. No peer benchmarking data is then displayed in that column for this KPI.)
Peer Group	• Determines who will be considered part of the peer group for this KPI. Options include: **Specified Org Branch**; **Same Job Title**; **Same Goal**; **All Orgs**; **This Org Only**. • Selecting **Specified Org Branch** enables the **Peer Organization** drop-down selector. • Selecting one of **Same Job Title**, **Same Goal**, or **All Orgs** makes all KPIs related to the selected KPI part of the peer group.
Peer Organization	Use this field to specify the target organization. See **Specified Org Branch** above.
Enable Drill Down	• Use this checkbox to enable or disable drill down for this KPI. • The peer benchmark value is underlined on the scorecard if drill down is enabled. • When the peer benchmark value is selected, a pop-up window displays the list of peers used for calculating the peer benchmark.

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Item	Description
Drill Down Depth Type	This field in conjunction with **Drill Down Depth Number** allows you to limit the scope of what is displayed in the drill down display. The choices are Percentage of Employees and Number of Employees.
Drill Down Depth Number	Enter a percentage or number of employees, depending on your selection for **Drill Down Depth Type**.
Display Name	Enables the display of the **Employee Name** column on the drill down window.
Display Actual	Enables the display of the **Actual** column on the drill down window.
Display Goal	Enables the display of the **Goal** column on the drill down window.
Display Peer	Enables the display of the **Peer** column on the drill down window.
Display Job Title	Enables the display of the **Job Title** column on the drill down window.
Display Organization	Enables the display of the **Organization** column on the drill down window.
Display Score	Enables the display of the **Score** column on the drill down window.

Terminating KPIs

You can terminate KPIs in Basic and Advanced Scorecards. This means that as of the date of termination, the KPI is no longer applied to employees.

To terminate a KPI:

Step	Action
1	Navigate to **App Admin > Scorecards Setup**.
2	Select the organization to which the KPI you want to terminate belongs.
3	Select the KPI, and click **Edit KPI** to open the **KPI Details** form.
4	Navigate to the **Effectivity** area of the form.
5	Click **Terminate**. An **End Date** field appears in the **Effectivity** area.
6	Click the calendar icon beside the **End Date** field, and select the termination date for the KPI.

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7 Click **Save**.

—End—

Deleting a KPI

Note: If the KPI you want to delete is included in an objective, it cannot be deleted until the KPI has been removed from the objective.

Step	Action
1	Navigate to **App Admin > Scorecards Setup**.
2	On the left panel, select the organization which contains the KPI you want to delete.
3	On the right panel, select the KPI you are deleting.
4	Click the **Delete KPI** button.

—End—

Purging a KPI

If you want to delete the data associated with a KPI, but you do not want to delete the KPI and its configuration, use the Scorecards Purge KPI feature.

To purge a KPI

Step	Action
1	Navigate to **App Admin > Scorecards Setup**.
2	On the left panel, select the organization which contains the KPI you want to purge.
3	On the right panel, select the KPI you are purging.
4	Click the **Purge KPI** button. ***Note:*** If the amount of data to purge exceeds the maximum allowed, the KPI is not be purgeable. A message appears to indicate this. If the KPI is not purgeable, you must copy the KPI, and then delete the original KPI.

—End—

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Managing Objectives

Once you configure KPIs, you are ready to associate the KPIs with specific objectives, by navigating to **App Admin > Scorecards Setup > Objectives**, and using the tools on the **Objectives** tab.

You can create objectives, and then configure them so that a number of a KPIs are associated with each objective.

Within each objective, KPIs can be balanced so that they each carry equal weight, or you can edit KPI weights so that they are weighted according to your requirements.

You can also copy objectives to other organizations, as well as edit or delete objectives.

Objectives are always associated with an organization, and can be applied to sub-organizations.

See:

- "Creating and Editing Objectives" (page 103)
- "Editing KPI Weights for Objectives" (page 104)
- "Copying Objectives" (page 105)
- "Deleting Objectives" (page 106)

To view the list of objectives associated with an organization:

Step	Action

1 Navigate to **App Admin > Scorecards Setup > Objectives**, and select an organization on the left panel. The right panel displays the list of objectives associated with that organization.

Column	Description
Name	Name of the objective.
Description	Description of the objective.
Owner Organization	The organization to which the objective belongs. An objective can be defined in a higher-level organization and set to apply to sub-organizations. The owner organization is the organization in which the objective was created.
Perspective	The scope of the objective, that is, the level within the organization that is associated with this objective.

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Column	Description
Apply to Sub-Orgs	Apply this objective to sub-organizations.
Balanced	Indicates whether all the KPI weights for all periodicities in the objective are balanced (sum up to 100%). By default, the system evenly distributes KPI weights within an objective for all unassigned weights. In other words, if you do not assign any KPI weights within an objective, each KPI will have the same weight. If it is not balanced, you can edit KPI weights. For details, see "Editing KPI Weights for Objectives" (page 104).

—End—

Creating and Editing Objectives

Step	Action
1	Navigate to **App Admin > Scorecards Setup > Objectives**.
2	On the left panel, select the organization for which you are creating an objective, or where you wish to edit an objective.
3	On the right panel, do one of the following: • if you are creating a new objective, click **Create Objective**. • If you are editing an existing objective, select that objective, and click **Edit Objective**. The **Objectives** details form opens.
4	In the **Objective Details** area of the form, do the following: • In the **Name** box, type the objective's name. • In the **Description** box, type the objective's description. • Click beside the **Perspective** box, and select an option from the drop-down list. • Check the **Apply to Sub-Orgs** box if you want the objective to be applied to the selected organization's sub-organizations
5	In the **KPIs** area, do the following:

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- Select one or more KPIs from the **Available** list. These are the KPIs that are associated with the selected organization.
- Click the >> arrows to the right of the **Available** list box. The selected KPIs appear in the **Assigned** list.
- If you want to re-order the list of KPIs in the **Assigned** list, select KPIs, then click the up and down arrows to the right of the **Assigned** list box to move them up and down. This ordering determines the display order of the KPIs in the Scorecard for the selected objective.

6 Click the **Save** button.

—End—

Editing KPI Weights for Objectives

Each objective has a total score assigned to it on the bottom of the scorecards.

By default, the system evenly distributes weights for KPIs within an objective, with the total weight equalling 100%.

You can change the balance of weighting in an overall objective score by setting individual weights for each KPI. Different weightings can be set for each periodicity (such as **Daily**, **Weekly**, or **Monthly**) so that the scorecards truly are customized to each objective and organization.

Note: If you change the balance of weighting for a KPI, the weighting must add up to 100%. If not, system cannot save the KPI weighting.

To edit KPI weights for an objective:

Step	Action
1	Navigate to **App Admin > Scorecards Setup > Objectives**.
2	On the left panel, select the organization to which the objective belongs.
3	Select the objective whose KPI weights you are editing, and click **Edit KPI Weights**. The **KPI Weights** screen opens, showing a list of the KPIs associated with the objective.
4	In the top right corner of the screen, click inside the **Periodicity** drop-down list box, and select the periodicity for which you want to edit the KPI weights (for example, select **Daily** or **Monthly**).

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5 Type a value in the text box beside each KPI name. When you are finished typing the values for each KPI, the **Total** box should show **100.0**.

6 Click the **Save** button.

7 To set KPI weights for each periodicity option, repeat steps 4 to 6.

Note: New or modified objectives do not take effect until the Scorecards Datawarehouse Sync adapter has been run.

—End—

Copying Objectives

Objectives can be copied to other organizations, for instance if multiple organizations have similar objectives but with unique KPIs or KPI weights. The copies can then be edited as needed.

Once copied, a new objective entity is created, where the copied objective's name appears as **Copy of *<original objective's name>***. All objective attributes from the original objective are in the copied objective, and if a KPI associated with the original objective exists in the new organization, it is also assigned to the copied objective.

However, if the KPI associated with the original objective does not exist in the organization to which you copied the objective, that KPI is disassociated from the copied objective.

To copy an objective:

Step	Action
1	Navigate to **App Admin > Scorecards Setup > Objectives**.
2	On the left panel, select the organization to which the objective you want to copy belongs.
3	Select the objective you want to copy, and click **Copy Objective**. The **Copy Objective** dialog box appears.
4	Check the boxes beside the organizations to which you want to copy the objective.
5	Click **Copy to Selected Organization (s)** and, when the dialog refreshes, click **Done**.

—End—

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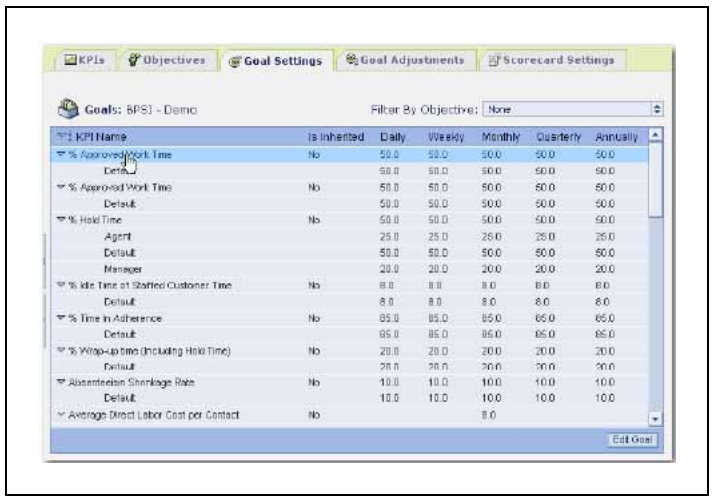
Deleting Objectives

Step	Action
1	Navigate to **App Admin > Scorecards Setup > Objectives**.
2	On the left panel, select the organization to which the objective you want to delete belongs.
3	Click **Delete Objective**. The objective is deleted.

—End—

Editing KPI Goals (Advanced Scorecards)

You can view KPI goals and their values by navigating to **App Admin > Scorecards Setup > Goal Settings**, and selecting the appropriate organization. The **Goals** screen opens, with a list of KPI names, expanded to show associated goals and their values.



From this screen, you can edit goal values for selected organizations using this screen. You can also edit the effective dates for goals.

If you want, you can narrow the list of KPI goals that you see on the screen by using the filter by objective feature.

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Filtering the KPI Goals list

Step	Action
1	At the top right of the **Goals** screen, click the arrows beside the **Filter by Object** drop-down list box, and select a filter option. If you do not want a filter, select **None**.

—End—

Viewing KPI Goals on the Goals screen

Each KPI contains a collapsible tree of its goals. Each goal value is defined for a specific periodicity, organization and job title. Unless otherwise specified, each KPI has default goal values. The default goal values are initially the average of the KPI's value range, and can be edited.

> ***Note:*** A KPI that rolls up to the organization level uses the default goal unless the **Goal Roll Up** box is checked for the KPI in the **Scorecards Setup** section of the **App Admin** module (see "Configuring Scorecards Settings" (page 112)). If the **Goal Roll Up** box is checked, the organization's goal is calculated by summing the actual goal value (individual goal values) of the employees in the organization.

When in collapsed mode, the goal values shown are the default values. By default, the goal value is the average of the upper and lower limits set for that periodicity for the KPI.

When you click the arrow beside a KPI name in the list to expand the goals tree, a list of all job titles and their goal values is displayed.

Column Descriptions:

KPI Name: The name(s) of KPI(s) associated with the selected organization.

Is Inherited: Goal values can be inherited from a higher organization. This column shows whether these goal values belong to this organization specifically or were inherited from a higher organization.

Daily, Weekly, Monthly, Quarterly, Annually: By default, these columns display the average of the upper and lower limits for periodicities set when the KPI was configured. For details on upper and lower limits, see "Periods and Limits" (page 95).

For details about editing KPI goal values and effective date changes, see:

- "Editing KPI Goal Values" (page 108)
- "About Effective Date Changes (Advanced Scorecards Only)" (page 109)

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Editing KPI Goal Values

Note: Organization KPIs only have default goals, not goals by Job Title. Changing a goal setting that was inherited from another organization unlinks the "child" goal setting from its parent. Subsequent changes made to the parent goal setting will not be reflected in the child that you changed.

Step	Action
1	Navigate to **App Admin > Scorecards Setup > Goal Settings** and, on the right panel, select the organization whose KPI goals you want to edit.
2	Select the KPI that you want to edit and Click **Edit Goal**. The **Edit Goal** screen opens. The **Edit Goals** table lists the goals for all defined job titles as well as the default goal for the current organization and shows an editable grid of the goal values specified for the goal's periodicities. You can add, modify, or delete any of the goal values. ***Note:*** • **The Originator Username** field is not editable. This field specifies who edited these goal settings last. If the username is SYSTEM, the values are the system initial default values, for example, the average of the KPI's upper and lower periodicity ranges. • **The Current Effective Date** field is not editable. This field shows the date on which the current goal took effect.
3	Check the **Apply To Sub-Orgs** checkbox if you want your sub organization to have these goal settings as well.
4	If you want to specify when the new goal should take effect, click the calendar icon beside the **New Effective Date** box, and select the appropriate date.
5	To save your changes, click **Save**. If you make a change in a goal setting that was inherited from another organization, you are prompted for confirmation when you click **Save**. • To restore the page to the settings that were in force when you first opened it (provided you have not saved your changes), click **Revert**. • To clear the existing settings, click **Clear** which will return to the default values.

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—End—

About Effective Date Changes (Advanced Scorecards Only)

Effective dates changes refer to backdating a goal, changing employee-org and/or employee-Job Title relationships. Scorecards supports effective date changes that are done in any time frame (past, present and future)

In case you backdate the existing goal effective date, all KPIs that are affected by this change need to be recalculated and all users that see the specific KPI on the scorecards receive the inconsistent data icon next to the their name on the scorecard.

Inconsistent Data can be due to effective date changes in the past of Goal, Employee-org or Employee-Job title relationships. Because effective date changes influence how data is calculated in Scorecards, any data related to the effective date change is recalculated. Recalculation is a heavy task for the calc engine so the recalculation is set to occur after the regular daily calc engine run.

The data will be recalculated in several days (depending on the extent of the change). You can configure some parameters of the recalculation under **System | Administration | General | Scorecards**.

Maximum number of days to recalculate (per each calc engine run): Specifies the maximum number of days to recalculate (per each calculating engine run). The default is 5 days.

Maximum recalculation time (in minutes): Specifies the maximum recalculation time (in minutes). The default is 60 minutes.

Goal Adjustments/Reductions

You can view and edit the goal adjustments for each organization. Goal adjustments are used to fine-tune the goal system and are meant to correct the goal settings of an employee or organization on a specific date or range of dates. For instance, a goal adjustment would allow you to add vacation to all the employees of an organization on a specific date.

To view goal adjustments, navigate to **App Admin > Scorecards Setup > Goal Adjustments** and select the appropriate organization. The **Goal Adjustments** screen opens, displaying the goal adjustments, as well as a filter feature and a date range selector.

Goal Adjustment Screen's Column Descriptions:

Name

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Description

Organization

Date (the date the goal adjustment is in effect, for example, **Every Sunday**)

Apply To (whether the adjustment applies to persons, organizations, or both)

Reduction % (the goal reduction percent)

Show in Scorecard (whether the adjustment should be shown in the Scorecard)

Apply to Sub-Orgs (whether the adjustment should be applied to Sub orgs.

You can also filter the goal adjustment list by using the organization filter and date range selector:

- To use the organization filter, click the arrows beside the **Filter by** drop-down list box at the top of the **Goal Adjustments** screen. Select one of the options in the drop-down list. You can filter the list by a specific organization (**Organization level only**), by an organization and its employees (**Organization and Employee**), or by a specific employee.
- To use the date range selector, click the calendar icons at the top right corner of the **Goal Adjustments** screen. Selecting the start date and end date for which you want to view the goal adjustment.

For details on creating, editing and deleting goal adjustments, see:

- "Creating and Editing Goal Adjustments" (page 110)
- "Deleting A Goal Adjustment" (page 112)

Creating and Editing Goal Adjustments

Step	Action
1	Navigate to **App Admin > Scorecards > Goal Adjustments** and, on the right pane, select the organization for which you want to create or edit a goal adjustment. The **Goal Adjustments** screen opens.
2	Do one of the following: • If you are creating a goal adjustment, click the **Create Goal Reduction**. • If you are editing a goal adjustment, select the goal adjustment in the right pane, and click **Edit Goal Reduction**. The **Goal Adjustment** form opens.
3	On the form, do the following:

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- Click the arrows beside the **Apply To** drop-down list box, and select an option to set whether the goal adjustment applies to an organization, a person, or both.
- If you selected **Person** from the **Apply To** box, click the arrows beside the Employee drop-down list box, and select the individual to whom the goal adjustment applies.
- In the **Name and Description** text boxes, type the name and description of the goal adjustment.
- In the **Reduction %** text box, type the percentage by which the goal is reduced.

  Note: If the reduction percentage is 100 and the **Show In Scorecard** checkbox is checked, that day nonetheless does not appear in the scorecard calendar. It is considered an inactive date.

- If you selected **Organization** or **Both** in the **Apply To** box and the goal adjustment applies to sub-organizations, check the **Apply To Sub-Orgs** box.
- In the **Effective** area, do one of the following:
  - Select the date range option, click the calendar icon beside the text boxes, and select the start and end dates for the goal adjustment.
  - Select the **Every** *[week day]* **of the week** option. Click inside the drop-down list box, and select a week day, such as **Sunday**.

- If you want to show the goal adjustment in the scorecard, check the **Show in Scorecard** box.

  Note: **Show in Scorecard** affects daily periodicity only. This option is typically used when a user was out for the entire day and the reduction is 100%. In this case the manager may want to “remove” the day from the scorecard.

  - If the **Show in Scorecard** checkbox is checked and the goal reduction = 100%, the specified day on the calendar is disabled [greyed out].
  - If the **Show in Scorecard** checkbox is not checked, a specified day on the calendar is still enabled even if the goal reduction = 100% (with this option the specified day in the Scorecard calendar is never grayed).

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- If appropriate, check the **Auto Roll Up** box. Checking the **Auto Roll Up** box causes the reduction percentage to influence higher periodicities (for example, reducing the weekly goal, the monthly goal, etc.).

4 When you are finished, click **Save**.

- To restore the page to the settings that were in force when you first opened it (provided you have not saved your changes), click **Revert**.
- To clear the existing settings, click **Clear**.

—End—

Deleting A Goal Adjustment

Step	Action
1	Navigate to **App Admin > Scorecards > Goal Adjustments** and, on the right pane, select the organization for which you want to delete a goal adjustment. The **Goal Adjustments** screen opens.
2	From the right pane, select the goal adjustment you want to delete.
3	Click **Delete Goal Reduction**. Click **OK** to confirm the deletion. The goal adjustment is removed.

—End—

Configuring Scorecards Settings

Navigate to **App Admin > Scorecards Setup > Scorecards Settings** and select the organization for which you want to modify settings.

You can modify:

- **Default Objective and Default Periodicity** filters, which are displayed in the Scorecards pages
- **Days of Operation**, which specify the days of the week that the center operates.

(Days that are marked as not in operation are grayed out in the Scorecard Calendar module and are not taken into consideration as working days for goal reduction and periodicity calculations.)

The default filter applied to objectives is **All Objectives**.

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To change the default objective filter:

Step	Action
1	Select the desired option from the **Default Objective** drop-down list.
2	Click **Save**. The default periodicity for Scorecards is Daily.

—End—

To change the default periodicity filter:

Step	Action
1	Select the desired option from the Default Periodicity drop-down list.
2	Click **Save**. The default days of operation are Sunday through Saturday.

—End—

To change the days of operation:

Step	Action
1	Select the check box for each day that the center is in operation.
2	Click **Save**. ***Note 1:*** Clicking on **Save** only affects the selected organization. If you click the **Save and Apply to Sub-orgs** button the changes in the Scorecards settings will apply to all sub organizations of the selected organization. ***Note 2:*** When creating a new organization, the scorecard settings of the new organization inherit the settings of its parent. ***Note 3:*** • To restore the page to the settings that were in force when you first opened it (provided you have not saved your changes), click **Revert**. • To clear the existing settings, click **Clear**.

—End—

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Configuring General System Settings

The **General** sidebar element in the **System|Administration** section lets you configure various system-wide options. Scroll down to view the parameters in the **Scorecards** container.

- **%Met - Count Only People With Scores**: If checked, only those employees with scores are used in the % Met calculation. In addition, the list of under performing employees will only contain employees with scores.
- **Source Measures - Convert Null Values to Zeros**: When the value of a KPI's formula is calculated, some source measures may have null values. This situation can occur for many reasons, the most common of which is no data in the source. This parameter causes the calculation engine to treat null values in the source measure as zero values. As an example, consider a KPI using the formula bm1+bm2, where bm1 is null. If the checkbox is checked, the calculation engine will return bm2. If the checkbox is not checked, the calculation engine will return a value of null, the equivalent of no score. The value associated with bm2 will not be shown.
- **Audit Source Measures**: Use this checkbox to enable or disable auditing of any insertions or updates of source measures entering Scorecards. The audit is stored in the table AUFACTBASEMEASURE in the database BPWAREHOUSEDB.
- **Enable Period to Date Scorecards**: Use this checkbox to enable or disable score calculations before the end of the period. Users expect to be able to access Weekly and Monthly scores before the completion of the period. Period-to-Date scores are calculated by running the Scorecards Calc Engine adapter for a period before all days in that period have been populated. Enabling this feature can adversely affect performance of Impact 360.
- **Enable Calculation Engine Performance Diagnostics**: Use this checkbox to enable or disable writing calculation engine performance diagnostics to the log table WHPERFORMANCELOG in the database BPWAREHOUSEDB.
- **Maximum number of days to recalculate (per each calc engine run)**: Specifies the maximum number of days to recalculate (per each calculating engine run). The default is 5 days.
- **Maximum recalculation time (in minutes)**: Specifies the maximum recalculation time (in minutes). The default is 60 minutes.
- **Maximum numbers of periods**: Specifies the maximum number of periods users can see in Scorecards' KPI Trends view and Scorecards' History view. This value is the maximum number a user can select from the Show drop-down list in History view and from For the last drop-down list in KPI Trends view. The default is 30, which is also the maximum

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number that can be specified. The minimum value that can be specified is 4.

- **Show "Filter Out Of Sync" warnings**: Use this checkbox to enable or disable the notification displayed when a Scorecards filter becomes invalid or inconsistent:

  The current Scorecard filter has become inconsistent because of Administrator changes to the Configuration. Please edit and save the current filter.

  (This can occur for a variety of reasons, including deleted KPIs, changes to access rights, etc.) Editing and saving the filter creates a filter that is valid at its time of creation.

- **Enable Supervisor Rollup**: Use this checkbox to enable or disable rolling up KPI data to the supervisor level.

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Appendix A Scorecards Privileges

This section details the privileges used for Scorecards' roles. Note that availability of certain Scorecards privileges depends on the license your organization purchased.

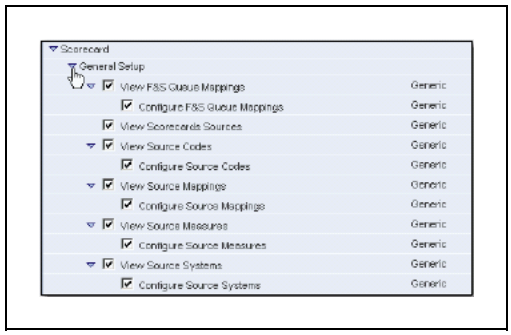
- "Scorecards Privileges" (page 117)
- "Goals Privileges" (page 119)
- "Objectives Privileges" (page 120)
- "Scorecards Privileges" (page 121)
- "Scorecard Settings Privileges" (page 130)
- "View KPIs Privileges" (page 130)

Scorecards Privileges

The following sections describe the roles and their associated privileges that Scorecards users require.

For details on working with roles and privileges, see "About Roles and Privileges" (page 25).

General Setup Privileges



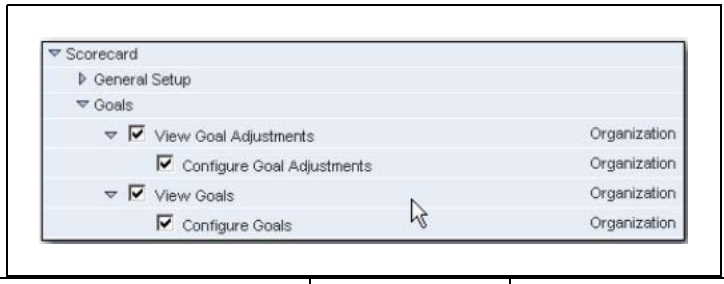
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Privilege Name	Privilege Description	Licence Category	Enabled by Default for	Scope
View F&S Queue Mappings	Allows role to access the F&S **Queue Mappings** tab of the **Scorecards Sources** section of the **System** module.	Basic Scorecards	• Administrator	Generic
Configure F&S Queue Mappings	Allows role to edit the F&S **Queue Mappings** tab of the **Scorecards Sources** section of the **System** module.	Basic Scorecards	• Administrator	Generic
View Scorecards Sources	Allows role to access the **Scorecards Sources** section of the **System** module.	Basic Scorecards	• Administrator • Branch Administrator	Generic
View Source Codes	Allows role to access the **Source Codes** tab of the **Scorecards Sources** section of the **System** module.	Basic Scorecards	• Administrator • Branch Administrator	Generic
Configure Source Codes	Allows role to edit the **Source Codes** tab of the **Scorecards Sources** section of the **System** module.	KPI Design	• Administrator • Branch Administrator	Generic
View Source Mappings	Allows role to access the **Source Mappings** tab of the **Scorecards Sources** section of the **System** module.	Basic Scorecards	• Administrator • Branch Administrator	Generic
Configure Source Mappings	Allows role to edit the **Source Mappings** tab of the **Scorecards Sources** section of the **System** module.	KPI Design	• Administrator • Branch Administrator	Generic
View Source Measures	Allows role to access the **Source Measures** tab of the **Scorecards Sources** section of the **System** module.	Basic Scorecards	• Administrator • Branch Administrator	Generic

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Privilege Name	Privilege Description	Licence Category	Enabled by Default for	Scope
Configure Source Measures	Allows role to add, edit, or delete source measures using the **Source Measures** tab of the **Scorecards Sources** section of the **System** module.	KPI Design	• Administrator • Branch Administrator	Generic
View Source Systems	Allows role to access the **Source Systems** tab of the **Scorecards Sources** section of the **System** module.	Basic Scorecards	• Administrator • Branch Administrator	Generic
Configure Source Systems	Allows role to create, edit, or delete source systems using the **Source Systems** tab of the **Scorecards Sources** section of the **System** module.	KPI Design	• Administrator • Branch Administrator	Generic

Goals Privileges

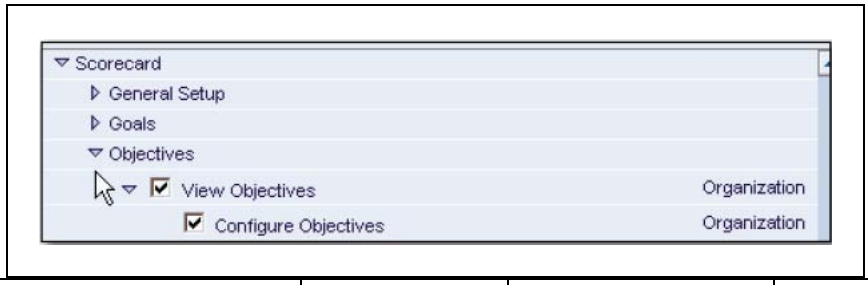


Privilege Name	Privilege Description	Licence Category	Enabled by Default for	Scope
View Goal Adjustments	Allows role to view goal adjustments using the **Goal Adjustments** tab of the **Scorecards Setup** section of the **App Admin** module.	Advanced Scorecards	• Administrator • Branch Administrator • Branch Manager • Manager	Organization
Configure Goal Adjustments	Allows role to create, edit, and delete goal adjustments using the **Goal Adjustments** tab of the **Scorecards Setup** section of the **App Admin** module.	Advanced Scorecards	• Administrator • Branch Administrator • Branch Manager • Manager	Organization

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Privilege Name	Privilege Description	Licence Category	Enabled by Default for	Scope
View Goals	Allows role to view goals using the **Goal Settings** tab of the **Scorecards Setup** section of the **App Admin** module.	Advanced Scorecards	• Administrator • Branch Administrator • Branch Manager • Manager	Organization
Configure Goals	Allows role to edit goals using the **Goal Settings** tab of the **Scorecards Setup** section of the **App Admin** module.	Advanced Scorecards	• Administrator • Branch Administrator	Organization

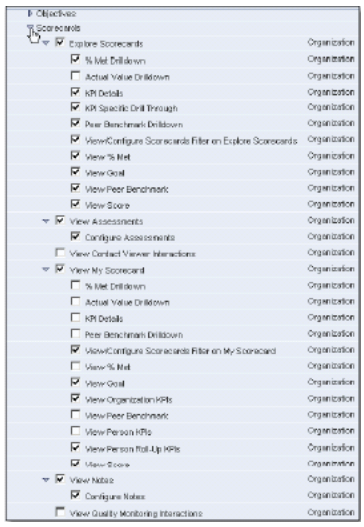
Objectives Privileges



Privilege Name	Privilege Description	Licence Category	Enabled by Default for	Enabled by Default for
View Objectives	Allows role to view objectives using the **Objectives** tab of the **Scorecards Setup** section of the **App Admin** module.	Basic Scorecards	• Administrator • Branch Administrator	Organization
Configure Objectives	Allows role to copy, edit, and delete objectives using the **Objectives** tab of the **Scorecards Setup** section of the **App Admin** module.	Basic Scorecards	• Administrator • Branch Administrator	Organization

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Scorecards Privileges



Privilege Name	Privilege Description	Licence Category	Enabled by Default for	Scope
Explore Scorecards	Allows role to access the **Explore Organizations**and **Explore Employees** sections of the **Scorecards** module.	Basic Scorecards	• Administrator • Branch Administrator • Branch Manager • Manager • Scheduler • Supervisor	Organization
% Met Drilldown	Allows role to click the value in the **% Met** column of the **Explore Organizations** and **Explore Employees** sections to access the **Management Coaching List** window.	Advanced Scorecards	• Administrator • Branch Administrator • Branch Manager • Manager • Scheduler • Supervisor	Organization

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Privilege Name	Privilege Description	Licence Category	Enabled by Default for	Scope
Actual Value Drilldown	Allows role to click the value in the **Actual** column on the **Explore Organizations** and **Explore Employees** sections of the **Scorecards** module to view the **Actual Value Drilldown** window, which shows how the KPI's actual value was calculated.	Basic Scorecards	• Administrator • Branch Administrator • Branch Manager • Manager • Scheduler • Supervisor	Organization
KPI Details	Allows role to click the KPI name in the **Name of KPI** column on the **Explore Organizations** and **Explore Employees** sections of the **Scorecards** module to view the **Key Performance Indicator Details** window, which shows detailed information about the currently selected KPI.	Basic Scorecards	• Administrator • Branch Administrator • Branch Manager • Manager • Scheduler • Supervisor	Organization
KPI Specific Drill Through	Allows role to click on the icons in the **Drill Through** column on the **Explore Organizations** and **Explore Employees** sections of the **Scorecards** module to drill through to **Adherence** tab to investigate	Basic Scorecards	• Administrator • Branch Administrator • Branch Manager • Manager • Scheduler • Supervisor	Organization

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Privilege Name	Privilege Description	Licence Category	Enabled by Default for	Scope
	the associated adherence information.			
Peer Benchmark Drilldown	Allows role to click the value in the **Peer** column on the **Explore Organizations** and **Explore Employees** sections of the **Scorecards** module to view the **Leader Board** window.	Advanced Scorecards	• Administrator • Branch Administrator • Branch Manager • Manager • Scheduler • Supervisor	Organization
View/Configure Scorecards Filter on Explore Scorecards	Allows role to view, create, and edit filter settings on the **Explore Organizations** and **Explore Employees** sections of the **Scorecards** module.	Basic Scorecards	• Administrator • Branch Administrator • Branch Manager • Manager • Scheduler • Supervisor	Organization
View % Met	Allows role to see the **% Met** column on the **Explore Organizations** and **Explore Employees** sections of the **Scorecards** module.	Advanced Scorecards	• Administrator • Branch Administrator • Branch Manager • Manager • Scheduler • Supervisor	Organization
View Goal	Allows role to see the **Goal** column on the **Explore Organizations** and **Explore Employees** sections of the **Scorecards** module.	Advanced Scorecards	• Administrator • Branch Administrator • Branch Manager • Manager • Scheduler • Supervisor	Organization

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Privilege Name	Privilege Description	Licence Category	Enabled by Default for	Scope
View Peer Benchmark	Allows role to see the **Peer** column on the **Explore Organizations** and **Explore Employees** sections of the **Scorecards** module.	Advanced Scorecards	• Administrator • Branch Administrator • Branch Manager • Manager • Scheduler • Supervisor	Organization
View Score	Allows role to see the **Score** column on the **Explore Organizations** and **Explore Employees** sections of the **Scorecards** module.	Advanced Scorecards	• Administrator • Branch Administrator • Branch Manager • Manager • Scheduler • Supervisor	Organization
View Assessments	Allows role to view the **Assessments** column on the **Explore Organizations** and **Explore Employees** sections of the **Scorecards** module.	Advanced Scorecards	• Administrator • Branch Administrator • Branch Manager • Manager • Scheduler • Supervisor	Organization
Configure Assessments	Allows role to create and edit assessments on the **Explore Organizations** and **Explore Employees** sections of the **Scorecards** module.	Advanced Scorecards	• Administrator • Branch Administrator • Branch Manager • Manager • Scheduler • Supervisor	Organization

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Privilege Name	Privilege Description	Licence Category	Enabled by Default for	Scope
View Contact Viewer Interactions	Allows role to click the **Interactions** link to access **Contact Viewer** to retrieve the employee's interactions.	Basic Scorecards	• Administrator • Branch Administrator • Branch Manager • Manager • Scheduler • Supervisor	Organization
View My Scorecard	Allows role to access the **My Scorecards** section of the **My Home** module.	Basic Scorecards	• Administrator • Agent • Branch Administrator • Branch Employee • Branch Manager • Manager • Scheduler • Supervisor	Organization
% Met Drilldown	Allows role to click the value in the **% Met** column of the **My Scorecards** section of the **My Home** module to access the **Management Coaching List** window.	Advanced Scorecards	• Administrator • Branch Administrator • Branch Manager • Manager • Scheduler • Supervisor	Organization

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Privilege Name	Privilege Description	Licence Category	Enabled by Default for	Scope
Actual Value Drilldown	Allows role to click the value in the **Actual** column on the **My Scorecards** section of the **My Home** module to view the **Actual Value Drilldown** window, which shows how the KPI's actual value was calculated.	Basic Scorecards	• Administrator • Agent • Branch Administrator • Branch Employee • Branch Manager • Manager • Scheduler • Supervisor	Organization
KPI Details	Allows role to click the KPI name in the **Name of KPI** column on the **My Scorecards** section of the **My Home** module to view the **Key Performance Indicator Details** window, which shows detailed information about the currently selected KPI.	Basic Scorecards	• Administrator • Agent • Branch Administrator • Branch Employee • Branch Manager • Manager • Scheduler • Supervisor	Organization
Peer Benchmark Drilldown	Allows role to click the value in the **Peer** column on the **My Scorecards** section of the **My Home** module to view the **Leader Board** window.	Advanced Scorecards	• Administrator • Agent • Branch Administrator • Branch Employee • Branch Manager • Manager • Scheduler • Supervisor	Organization

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Privilege Name	Privilege Description	Licence Category	Enabled by Default for	Scope
View/Configure Scorecards Filter on My Scorecard	Allows role to view, create, and edit filter settings on the **My Scorecards** section of the **My Home** module.	Basic Scorecards	• Administrator • Branch Administrator • Branch Employee • Manager • Scheduler • Supervisor	Organization
View % Met	Allows role to see the **% Met** column on the **My Scorecards** section of the **My Home** module.	Advanced Scorecards	• Administrator • Branch Administrator • Branch Manager • Manager • Scheduler • Supervisor	Organization
View Goal	Allows role to see the **Goal** column on the **My Scorecards** section of the **My Home** module.	Advanced Scorecards	• Administrator • Agent • Branch Administrator • Branch Employee • Branch Manager • Manager • Scheduler • Supervisor	Organization
View Organization KPIs	Allows role to view organization KPIs on the **My Scorecards** section of the **My Home** module.	Basic Scorecards	• Administrator • Branch Administrator • Branch Manager • Manager • Scheduler • Supervisor	Organization

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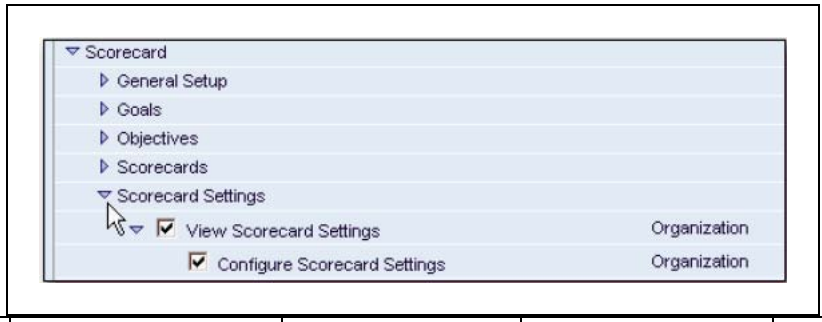
Privilege Name	Privilege Description	Licence Category	Enabled by Default for	Scope
View Peer Benchmark	Allows role to see the Peer column on the **My Scorecards** section of the **My Home** module.	Advanced Scorecards	• Administrator • Agent • Branch Administrator • Branch Employee • Branch Manager • Manager • Scheduler • Supervisor	Organization
View Person KPIs	Allows role to see person KPIs on the **My Scorecards** section of the **My Home** module.	Basic Scorecards	• Agent • Branch Employee • Scheduler	Organization
View Roll-Up KPIs	Allows role to see person roll-up KPIs on the **My Scorecards** section of the **My Home** module.	Basic Scorecards	• Administrator • Branch Administrator • Branch Manager • Manager • Scheduler • Supervisor	Organization
View Score	Allows role to see the **Score** column on the **My Scorecards** section of the **My Home** module.	Advanced Scorecards	• Administrator • Agent • Branch Administrator • Branch Employee • Branch Manager • Manager • Scheduler • Supervisor	Organization

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Privilege Name	Privilege Description	Licence Category	Enabled by Default for	Scope
View Notes	Allows role to click on the full envelope icon in the **Notes** column of the **Scorecards** module to view the notes associated with the KPI.	Advanced Scorecards	• Administrator • Agent • Branch Administrator • Branch Manager • Manager • Scheduler • Supervisor	Organization
Configure Notes	Allows role to click on the empty envelope icon in the **Notes** column of the **Scorecards** module to create a note for the KPI.	Advanced Scorecards	• Administrator • Agent • Branch Administrator • Branch Employee • Branch Manager • Manager • Scheduler • Supervisor	Organization
View Interactions	Allows role to click the **Interactions** link to access **Quality Monitoring** to retrieve the employee's interactions.	Basic Scorecards	• Administrator • Branch Administrator • Branch Manager • Manager • Scheduler • Supervisor	Organization

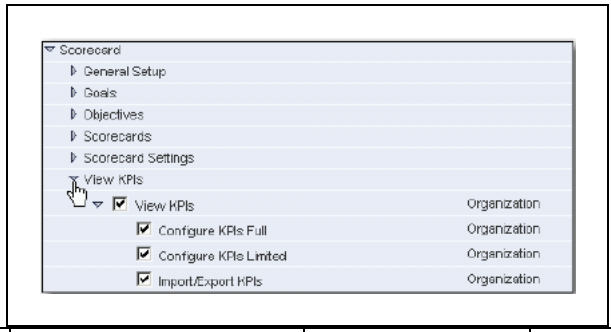
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Scorecard Settings Privileges



Privilege Name	Privilege Description	Licence Category	Enabled by Default for	Scope
View Scorecard Settings	Allows role to view the **Scorecard Settings** tab of the **Scorecards Setup** section of the **App Admin** module.	Basic Scorecards	• Administrator • Branch Administrator	Organization
Configure Scorecard Settings	Allows role to modify the settings on the **Scorecard Settings** tab of the **Scorecards Setup** section of the **App Admin** module.	Basic Scorecards	• Administrator • Branch Administrator	Organization

View KPIs Privileges



Privilege Name	Privilege Description	Licence Category	Enabled by Default for	Scope
View KPIs	Allows role to view the KPIs tab of the **Scorecards Setup** section of the **App Admin** module.	Basic Scorecards	• Administrator • Branch Administrator • Branch Manager • Manager	Organization

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Privilege Name	Privilege Description	Licence Category	Enabled by Default for	Scope
Configure KPIs Limited	Allows role to use the **Edit** and **Delete** buttons on the **KPIs** tab of the **Scorecards Setup** section of the **App Admin** module, and can modify some KPI attributes based on license (Basic Scorecards vs. Advanced Scorecards vs. KPI Design).	Basic Scorecards	• Administrator • Branch Administrator	Organization
Configure KPIs Full	Allows role to modify all KPI attributes on the **KPIs** tab of the **Scorecards Setup** section of the **App Admin** module.	KPI Design	• Administrator • Branch Administrator	Organization
Import/Export KPIs	Allows role to import and export KPIs using the **Import KPI** and **Export KPI** buttons on the **KPIs** tab of the **Scorecards Setup** section of the **App Admin** module.	Basic Scorecards	• Administrator • Branch Administrator	Organization

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Appendix B
Working with the Integration Server

This section provides the information required to access various integration servers used for your site, including information about the content and structure of the Integration Server and the different Scorecards integration packages included.

This chapter includes the following topics:

- "Working with Integration Servers" (page 133)
- "Integration Server Monitoring (Root Level)" (page 134)
- "Integration Server Monitoring (Package Level)" (page 135)
- "Scorecards Integration Packages" (page 136)
- "Timer Settings" (page 137)
- "Backing Up/Restoring Databases" (page 138)

Working with Integration Servers

The Integration section of the web application's System module lists the names of the various integration servers for your site, their fully qualified names, and the RMI (Remote Method Invocation) ports through which they communicate.

The integration server also includes the list of integration packages available for your Scorecards license.

> ***Note:*** RMI is a protocol that enables the Integration Server to communicate with the rest of the Nortel suite. It does not need to be configured.

Accessing an integration server:

Step	Action
1	Select the integration server you want to view.
2	Click the **Edit Configuration** button to see the integration packages.

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—End—

For details on working with the integration server and Scorecards integration packages, see:

- "Integration Server Monitoring (Root Level)" (page 134)
- "Integration Server Monitoring (Package Level)" (page 135)
- "Scorecards Integration Packages" (page 136)
- "Timer Settings" (page 137)

Integration Server Monitoring (Root Level)

The Integration Server is the highest level component in the hierarchy shown in the Integration Package pane.

When the top level (Integration Server) is selected on the left (this level is also referred to as root level), the machine name is displayed near the top of the right window.

The content and structure of the Integration Server is controlled by a set of tabs.

Tab	Description
Monitor	At the Integration Server level, the **Monitor** tab is used to check the status of the server and integration packages. It also allows you to control the operation of the Integration Server and the integration packages.
Configure	At the Integration Server level, the **Configure** tab is used to set up the description of the Integration Server. It also displays the number of integration packages for which you are licensed, and allows some advanced configuration parameters to be set.
Integration Server Workflow	At the Integration Server level, the **Workflow** tab is used to configure the IS with one to 15 Integration Packages.

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Tab	Description
Stop/Start Button	This button is used to stop the related integration component. Click the button to stop the process. When the process is stopped, a red stop-sign icon appears on the left of the screen in line with the process. When you stop a sub task, the server and all other sub tasks remain active. However, when you stop the server, you also stop all of the server's packages.
Status Light	A status light appears to the left of the server or a package. If a red or yellow light is displayed, go to the log and read the message to determine the cause. A red light means that the latest status message shows an error. A yellow light means that there has been an error within the last ten messages. The status light will turn green when there is no error in the last ten messages.

Integration Server Monitoring (Package Level)

An integration package is a set of integration components bundled together to act as a unit. Together, these components accomplish the specific task that the package was designed to do. An integration package can be either generic or vendor-specific. For instance, you might have one or more integration packages which collect contact statistics from your data source(s). You will have several integration packages which are designed to accomplish specific tasks within Nortel suite.

The content and structure of the Integration Server packages is controlled by a set of tabs.

Tab or Button	Description
Stop/Start Button	This button is used to stop the related integration component. Click the button to stop the process. When the process is stopped, a red stop-sign icon appears on the left of the screen in line with the process.
Status Light	A status light appears to the left of the server or a package. If a red or yellow light is displayed, go to the log and read the message to determine the cause. A red light means that the latest status message shows an error. A yellow light means that there has been an error within the last ten messages. The status light will turn green when there is no error in the last ten messages.
Import Now button	Click this button If you need to make the integration package run on an ad hoc basis. The package will run on demand.

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Tab or Button	Description
Monitor Tab	At the package level, the **Monitor** tab displays the status of the package and its components. You can also use this tab to control the operation of the package.
Configure tab	At the package level, you use the **Configure** tab to set the description of the package and to set the path to the data source. You also use it to configure the plug-ins.
Data Source tab	Not all packages use the **Data Source** tab. For those that do, you use the **Data Source** tab to select the system, ACD, etc., from which the Integration Server will retrieve agent information. You select the data source from a pull-down list. You can also enter a short description of the data source, as well as add a new data source or rename a data source.
Workflow tab	At the Package level, you use the **Workflow** tab to set up the task managers and configure them with a set of integration functions/components arranged in a specific order. You can set up the integration tasks and their components in a workflow in various ways as needed to correctly convert and import the file into the database.

Scorecards Integration Packages

Several integration packages for Scorecards are used with the Nortel suite:

- **Scorecards - DataWarehouse Sync**: A batch process that synchronizes data from the Nortel suite's main database with the Scorecards Data Warehouse. The data synchronized is data that is "static" in the sense that the data changes occasionally and refers to data in the warehouse dimension table, as opposed to data that is extracted by plug-ins on a daily basis to populate the Warehouse fact tables.
- **Generic - ASCM- Agent Scorecard Metrics**: A batch process that imports source measures from a text file to the Scorecards database.
- **Scorecards - F&S Measure Extract**: A batch process that extracts daily data from Forecasting and Scheduling and inserts it into the Scorecards Warehouse. This data, which is called Source Measures, is used by the calculation engine to calculate KPIs.
- **Scorecards - Calc Engine**: A batch process that calculates on a daily basis the KPI formula for all employees and organizations defined in the Scorecards Warehouse. The calculation engine runs on the Source Measure data entered by the extractor plug-ins and, using the KPI formulas, calculates the KPI scores.
- **Scorecards - Adherence Measure Extract**: A batch process that extracts daily data from Adherence and inserts it into the Scorecards

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Warehouse. This data, which is called Source Measures, is used by the calculation engine to calculate KPIs.

- **Scorecards –Source Metadata Import**: Allows you to create source measures automatically, using an XML file.
- **Scorecards - Source Measure Import Adapter**: Provides a batch process that imports the values of several source measures from a text file into the Nortel Scorecards database. These values are received from external sources.

  This adapter also allows you to configure it so that source measure values in Scorecards are updated when data is deleted from related applications.

  Note: This adapter is only used if you are also licensed for KPI Design.

- **Speech Source Measure Export Adapter**: Allows you to create a source measure that integrates Speech Analytics data with Scorecards KPIs.

  Note: For more details on Speech Analytics, view the *Speech Analytics Installation and Configuration Guide*.

- **eLearning– Import Evals, KPIs & Competency Calculation**: Allows you to import competencies and Evals from Lesson management into Scorecards, and export KPIs from Scorecards into eLearning.

  Note: All Scorecards implementations use the first four packages.

These integration packages are configured during installation and integration of the Workforce Optimization suite. For a comprehensive listing of packages, see the *Nortel Workforce Management Administration Guide* (NN44480-600).

Timer Settings

Timers are clocks that trigger an integration package to run. Most integration packages are established to run on timers when installed. (Continuous Extenders do not since they run continuously.)

Some packages, notably Advanced Scorecards packages, have some dependencies and must be run in a particular order. The DataWarehouse sync must be run first, and the Calc Engine must be run last. If the Forecasting and Scheduling solution is being used with Advanced Adherence, then Report Dump must be run before F&S Measure Extract.

The correct order for Advanced Scorecards configurations is:

1. DataWarehouse Sync (will probably run every hour throughout the day)
2. Report Dump (typically just once/day)

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3. F&S Measure Extract (typically just once/day)
4. Calc Engine (typically just once/day)

Specific ACD Agent Stats packages may be configured to run anytime after the DataWarehouse Sync and before the Calc Engine.

For other integration packages, such as Time Records Auto-close, the order is not as critical. However, these processes can take considerable server system resources, so it is suggested that they are run one at a time, usually at night when demand is lower for server resources.

Most often, once these timer settings are configured, they do not need to be changed.

Note: When you backdate a KPI goal you cannot see a change on the scorecard until the next day. This goal change and back-effective date will set a flag that tells the calc engine to recalculate the affected KPI for the dates covered by the back date.
Calc Engine Adapter alerts users when no KPIs are processed. You can see if no KPIs were calculated. This is not an error.

Backing Up/Restoring Databases

When using Scorecards, the BPMAINDB and BPWAREHOUSEDB databases work as a pair and should be backed up one after the other on the same day. During restore, both DBs should be restored one after the other as a pair on the same day. Failing to do so will result in a corrupt scorecards DB.

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Appendix C Integrating and Synchronizing Scorecards with Other Systems

Scorecards can be configured to work with various other applications and systems. This chapter covers the various settings and synchronization tools required for successful integration and data synchronization with the following systems:

- "Configuring Drill Through to Contact Viewer" (page 139)
- "Configuring Drill Through to Nortel Quality Monitoring" (page 141)
- "Synchronization with Nortel Quality Monitoring" (page 142)
- "Integration with eLearning" (page 145)

Configuring Drill Through to Contact Viewer

Scorecards can be configured to provide a manager with the ability to better analyze agent KPIs by drilling down to the calls that were made by an agent (on the same date range) and playing them back using Contact Viewer. Before you can configure Scorecards to Drill through to Contact Viewer, set up a query from within Contact Viewer. Then, within scorecards, follow the steps below.

Create Data Source

Step	Action
1	Navigate to **System>Data Sources>Settings**.
2	Click **Create Data Source**.
3	Select **Phone**.
4	Setup a Contact Viewer server name and port.
5	Setup the Contact Viewer URL.

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Note: If you want to change the query name in Viewer. (The default is DTC), use Contact Viewer URL override. You can only change the QueryName in the template. Changing other values will cause features not to work.
http://<VIEWERSERVERNAME>:<VIWEWERSERVER-PORT>/nortel/default.asp?QueryParams=QueryName~DTC|AgentId~AGENTID>|Start-DateFrom~STARTDATEFROM>|StartDateTo~<START-DATETO>|ExecuteQuery~Yes

—End—

Assign the New Data Source to Agents

Step	Action
1	Navigate to the **People>Profiles** section.
2	Select an agent name from the list.
3	Click the checkboxes to assign the agents to the new Contact Viewer data source that you created.

—End—

Configure Role Privileges

In order for a role (such as Supervisor or Manager) to be able to drill through to Contact Viewer, that role must be assigned the correct privilege.

Step	Action
1	In the **App Admin|Security|Roles Setup** section, select the role name that you would like to allow to drill through to Contact Viewer interactions, and click **Edit Role**.
2	Under **Scorecards/Scorecards**, enable the **View Contact Viewer Interactions** privilege.
3	Click **Save**. When the feature is properly configured, the Interactions icon should appear in the employee scorecard view for all users with the role you configured.

—End—

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Configuring Drill Through to Nortel Quality Monitoring

Scorecards can be configured to allow drilling through to interactions in Nortel Quality Monitoring. To configure this feature:

Synchronize Employee Data

Synchronize employee data between Scorecards and Nortel Quality Monitoring by running the appropriate tool or adapter. See "Synchronization with Nortel Quality Monitoring" (page 142).

Create Data Source

To create Data Sources for Integration with Nortel Quality Monitoring:

Step	Action
1	Navigate to **System>Data Sources>Settings**.
2	Click **Create Data Source**.
3	Select **Quality** and enter the requested information.
4	Click **Save**.

—End—

Assign the New Data Sources to Agents

Step	Action
1	Navigate to the **People>Profiles** section.
2	Select an agent name from the list.
3	Click the checkboxes to assign the new data sources that you created.

—End—

Configure Role Privileges

In order for a role (such as Supervisor or Manager) to be able to drill through to a call recorded by Nortel Quality Monitoring, that role must be assigned the correct privilege.

To configure a role to drill through to Nortel Quality Monitoring calls:

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Step	Action
1	Navigate to **App Admin>Security>Roles Setup**.
2	Select the role name that you would like to allow to drill through to Nortel Quality Monitoring interactions.
3	Navigate to **Scorecard|Scorecards** and enable the **View Quality Monitoring Interactions** privilege. ***Note:*** In order for a role to Drill through to Nortel Quality Monitoring the **View Contact Viewer** Interactions privilege must be disabled, or your system will be set up to drill through to Contact Viewer rather than Nortel Quality Monitoring.

—End—

Run the Datawarehouse Sync Adapter

Step	Action
1	In the **System|Integration** section, select the **Scorecards Datawarehouse Sync Adapter**.
2	Click **Import Now** to run the Scorecards Datawarehouse Sync adapter. When the feature is properly configured, the Interactions icon should appear in the employee scorecard view for all users with the role you configured.

—End—

Synchronization with Nortel Quality Monitoring

When synchronizing WFO with Nortel Quality Monitoring, agent data must be synchronized with Scorecards using the User Synchronization Tool (UST).

The User Synchronization Tool

Configuration is typically a one-time edit made after the User Synchronization Tool is installed. If new sites are brought online, the configuration may need to be revised. For more detailed information, see the *Nortel Quality Monitoring User Synchronization Tool User Guide* (NN44480-506).

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Nortel Quality Monitoring Synchronization Considerations

When Synchronizing data between Nortel Quality Monitoring and WFM, these conditions must be met:

- Employees must be assigned to a Supervisor
- Terminated Employees should be deleted from WFO
- New Employees should be created in WFO
- Employee demographics not synchronized from WFO must be manually maintained in Nortel Quality Monitoring
- Special Filters accessible to wsuperuser must be maintained

Ensure that every agent is assigned to a Supervisor if Nortel Quality Monitoring is being integrated. Nortel Quality Monitoring builds its structure based on who the agent reports to instead of WFO's organization structure.

- If WFO is the master, one or more filters must be created to designate which employees will be synchronized to Nortel Quality Monitoring. The standard naming convention for these filters is [Site]QMEmpExport, where [Site] would be replaced by the specific site name(s) that need to be synchronized. (If there is only one site, the site designator may be omitted.) These filters need to include any employees that should be synchronized to Nortel Quality Monitoring, which typically means at least the agents handling calls. There is no particular harm done if it also includes other employees.

  If these filters are deleted, the exports will no longer work and no updates will be sent to QM/LMI until a new filter is configured for the export.

  The filter names should not be 'changed', meaning that they have to stay the same way that they are initially set, not that they have to follow the naming conventions mentioned above. If one of these filter names is changed from its initial name, the exports will no longer work and no updates will be sent until the exports are re-configured with the new name.

  If the filters are edited to change which employees are included, then the employees exported will change accordingly. Employees who were formerly in the export but are now excluded will not be deleted from QM/LMI – they simply won't be updated. This could result in inaccurate employee information in the QM/LMI modules.

- In addition to the filters used for synchronization, there may be other special filters used for exporting data to other systems using the various standard adapters. For example, the Time Record Export adapter would use a filter called TREEmpExport. The same rules apply to these filters as for the synchronization filters discussed above.

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Note: Both of these filters are created under the 'wsuperuser' login. This means that they can only be updated by someone who has the 'wsuperuser' password. Unfortunately, it also means they can be updated by anyone who has this password. There is no way to exclude customers from being able to change or delete these filters, so they should be cautioned against doing anything harmful.

Drilling Through to Interactions

With the appropriate licensing and system integration, you can drill through from the **Scorecards** module to recorded calls/playback applications such as Quality Monitoring. This generic drill through allows you to get a more detailed context on the reason why your employees got specific KPI scores.

You can retrieve the interactions from within Contact Viewer or Quality Monitoring for the selected agent within a selected period of time. This link is enabled for **Daily**, **Weekly**, and **Monthly** periodicities, if the selected agent has been mapped to an appropriate data source.

Note: You can access the link to the Interactions page if you use Quality Monitoring/Contact Viewer and your Administrator has enabled this feature. Your access also depends on your privileges and how the data sources have been configured by your administrator.

To drill through to Interactions

Step	Action
1	In the web application, navigate to **Scorecards** and click the **Explore Employees** tab.
2	On the left panel, select the employee whose interactions you wish to review.
3	Select the periodicity and date range in which the interactions occurred.
4	Click the **Interactions** button at the top of the right panel. Depending on the application to which you drilled through, one of the following happens: • If you drilled through to Contact Viewer, that application's window opens, with a search page. • If you drilled through to Quality Monitoring, the **Interactions** pop-up window opens with a list of interactions. The Quality Monitoring **Interactions** window contains the following elements:

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Column	Description
Content	Indicates in which format the content is stored: **Only Voice**, **Only Desktop**, or **Voice with Desktop**.
Name	A unique, system-generated interaction name within the Quality Monitoring system.
Start Date	The Date and Time the Interaction started.
End Date	The Date and Time the Interaction ended.
Duration	The length of time of the interaction from start date to end date.
Triggered by	Whether the interaction was triggered by Workforce Management.
Employee was Primary	Whether this employee was the first employee on the call. (If the call was conferenced-in or transferred. then this employee was not primary.)

1. On the **Interactions** screen, select the interaction you would like to play back, and click the **Playback** button.
2. When you are finished viewing this screen, click **Done** to return to the main **Scorecards** screen.

—End—

Integration with eLearning

Using Scorecards, you can perform the following eLearning tasks:

- Import Competencies from eLearning
- Define KPIs to measure competencies
- Import employee data to calculate the KPIs
- Create a rule that checks the calculated KPIs and also informs the eLearning system of employees that need to improve certain competencies.

An eLearning Trigger is a mechanism to alert the eLearning system when KPIs fall outside a range set by the user. In order to trigger eLearning, every KPI must be associated with a Competency. The below-standard KPI value is defined in the trigger by a threshold relative to the goal (not the score.)

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Agents who record low KPI scores (bad Competency) require training. Lessons are automatically assigned to these agents by the eLearning solution.

Configuring eLearning for Scorecards

In order for eLearning competencies to be imported into Scorecards, they must first be created, and then mapped to KPIs.

For details, see:

- "Creating a competency" (page 146)
- "Mapping a competency to a KPI" (page 146)
- "Exporting competencies to Scorecards" (page 147)"Exporting competencies to Scorecards" (page 147)

Creating a competency

Step	Action
1	Navigate to **Learning|Competencies|Settings** and select an organization.
2	Click **Create Competency**.
3	Give the competency a name and description, and select the calculation source and periodicity from the available selections.
4	Click **Save**. The competency should appear in the list on the right pane of the **Settings** tab.

—End—

Mapping a competency to a KPI

Step	Action
1	Click the **Mappings** tab, and select a competency from the list in the left pane.
2	Select the **KPIs** tab, and then click **Add**.
3	Click the appropriate checkboxes to map the selected competency to various KPIS.

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4	Click **Save**. The competency is mapped.

—End—

Exporting competencies to Scorecards

Step	Action
1	Navigate to **System|Integration** and select the Import **Evals, KPIs, and Competency Calculations** Integration Package.
2	Select **Yes** from the **export competencies to SC** drop down menu.
3	Click **Save**. Source Measures are automatically created for each newly imported competency, which are ready to be used to create KPIs.

—End—

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Appendix D Troubleshooting and Common Problems

Administrators are required to troubleshoot technical issues faced by employees. This section lists a few common problems that may occur in your environment, and methods you can use to resolve them.

- "Our Employees Cannot Log In" (page 149)
- "The Actual Scores Seem Too Low/High" (page 149)

Our Employees Cannot Log In

If all employees cannot log in, the application server or network connectivity to the application server is probably down (asking the employees if they can even see the login screen will help determine this).

If this problem is limited to an individual, remember that usernames and passwords are case-sensitive and that passwords must be at least eight characters long. If the employee cannot remember his/her password, simply log on as an Administrator, go the People module and enter a new password for the employee. The employee may then change his or her password after logging in with the one that you provided.

The Actual Scores Seem Too Low/High

If the actual scores seem too high or low, there is probably a configuration problem to solve. If the entire organization's actual scores seem too high or low, check the Source mapping to see if too many/too few queues are mapped to the organization(s) in question. Secondly, if you have had a influx of new employees, it is possible that they have not been entered into WFO.

In the case of individual or organizational rollup scores being too high or low, it is possible that the ACD is misrepresenting the data or the data is not being grouped into WFO in such a manner to give you the report you need. Compare the actual ACD data to the actual data in Advanced Scorecards to see if there are any discrepancies. It is also possible that the

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way that Advanced Scorecards calculates the scores may be different than you thought. See the Overview of Key Performance Indicators found in the appendix for a listing of the equations used for each KPI score.

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Nortel Workforce Management

Scorecards Configuration and Maintenance Guide

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