Avaya Experience Platform™ Workforce Engagement

Real-Time Agent Assist Setup Guide

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Contents

About this guide

This guide describes how to configure the Real-Time Agent Assist solution and provides references to the various WFO user guides that describe the configuration procedures in detail.

Intended audience

This guide is designed for use by customers who need to configure Real-Time Agent Assist. The procedures in this guide are intended for Application Administrators, Department Managers, and Speech Administrators.

Document revision history

Revision	Description of changes
1.09	Added information about the new Da Vinci Interaction Summary and Fetch services.
1.08	Minor text edits
1.07	Minor text edits.
1.06	Added new section: *Cloud real-time transcription considerations*
1.05	Minor text edits.
1.04	Minor text edits.
1.03	Minor updates
1.02	Updates throughout the guide for the new Real-Time Linguistic (remote) engine.

Revision	Description of changes

1.01	• *Real-Time Agent Assist setup workflow*:
	  ▪ Added links to How To clips.
	  ▪ Under *Configure organization alert rules*: For DPA event alerts, the rule type must be set to Desktop Analysis Alert.
	• Added Work Assist setup workflow

1.00	New release

Chapter 1

Real-Time Agent Assist

Real-Time Agent Assist (RTAA) is a solution that analyzes linguistic, acoustic, and application events in real-time interactions, and provides in-context assistance and work automation solutions to employees.

Topics

Real-Time Agent Assist overview

Verint® Real-Time Agent Assist™ is a cloud-based, AI-powered solution that analyzes calls and desktop activities in real time and automates workflows. It automatically identifies opportunities to guide and assist employees, and when certain criteria are met, employees receive notifications in desktop messages, emails, DPA alerts, or in a centralized notification center called Work Assist.

The following example illustrates how RTAA provides agents with assistance in real time and automates workflows.

Example: Assist agent with submitting an insurance claim

A customer calls an insurance call center to file a new insurance claim over the phone. RTAA monitors the call and detects terms and phrases that indicate that the call is about filing an insurance claim. RTAA triggers a notification that pops up in the agent's Work Assist desktop application with a link to instructions on how to file a claim. After reading the instructions, the agent successfully prepares the insurance claim. After the call ends, RTAA triggers an AI-generated summary of the call to pop up in the agent's Work Assist application. The agent can now attach the summary and submit the claim.

RTAA monitoring modules

The RTAA solution comprises acoustic, linguistic, and application modules to monitor ongoing interactions:

- **Acoustic module:** The Acoustic module monitors non-verbal events in the audio flow, such as long silences and interruptions. You can select which events to monitor and define the maximum duration permitted for the events. Long silence, in the context of Real-Time Acoustics, monitors the absence of speech on both sides of the recording channel, and not the absence of sound.

  > ⚠ Real-Time Acoustics is supported only with stereo recording.

- **Linguistic module (Real-Time Speech Analytics):** The Linguistic module monitors verbal events in the audio flow, based on spoken words that match the terms defined in categories to capture customer emotions, tone, and sentiment. You can deploy the Linguistic module with or without Speech Analytics.
- **Application triggers module:** Desktop Process Analytics (DPA) recognizes events in software applications and triggers actions based on these events.

RTAA notification modules

The RTAA solution can deliver notifications in the following notification modules:

- **Work Assist:** Work Assist is a desktop client application that presents real-time contextual notifications to the agent during an ongoing interaction or immediately after an interaction ends. The notifications can provide links to information needed by the agent, identify situations that require actions from the agent and remind them of what to do, or present the agent with an AI-generated interaction summary of the call immediately after it ends to save the agent time on after-call wrapup tasks.
- **Desktop Messaging**: Desktop messages are short notifications that appear as pop-ups on the employee's desktop or that can be accessed on the Windows task bar.

- **DPA Alert:** The DPA desktop client triggers alerts or actions on the employee's desktop. Triggered actions can include displaying a web page, opening an application, or populating specific fields in an application.
- **Email:** RTAA can trigger an email to be sent to specific employees when an event is detected.

Related topics

Real-Time Agent Assist architecture, page 10
Real-Time Agent Assist setup , page 15
Real-Time Agent Assist data analysis, page 24

Real-time transcription

To perform real-time detection of terms and phrases in the audio flow, the Linguistic module relies on transcription of ongoing interactions.

The following engines are available for transcribing interactions in real time (depending on your configuration):

- **Real-Time Speech Analytics engine:** The Real-Time Speech Analytics engine transcribes interactions locally on the Recorder on which the interactions are recorded. Real-Time Speech Analytics is designed for high performance during live processing of audio streams, with a marginal tradeoff in accuracy compared to an offline transcription engine. Transcription accuracy can be improved by refining category definitions to enhance the precision of category hits, and by tuning the language model.
- **Real-Time Linguistic (remote) engine:** The Real-Time Linguistic (remote) engine performs the same functions as the local Real-Time Speech Analytics engine, with interactions being transcribed remotely in the cloud, instead of locally on the Recorder on which the interactions are recorded. This approach conserves processing resources on the Recorder. In addition to reducing the workload on the Recorders, the Real-Time Linguistic (remote) engine also provides enhanced transcription accuracy and precision of category hits compared to the existing Real-Time Speech Analytics engine.

  When working with the Real-Time Linguistic (remote) engine, RTAA offers the following add-on services:

  - **Interaction Summary:** Upon call completion, Interaction Summary automatically triggers an AI-generated summary based on the interaction's real-time transcription. The summary can either be displayed directly in the employee's Work Assist desktop application to assist the employee with after-call wrapup tasks, or it can be fetched via an API call for use in a third-party application.
  - **Interaction Summary Fetch:** Upon call completion, you can fetch the interaction summary via an API call for use in a third-party application.
  - **Trancription Fetch:** Upon call completion, you can fetch the real-time transcription via an API call for use in a third-party application.

  Interaction Summary service requires stereo recording.

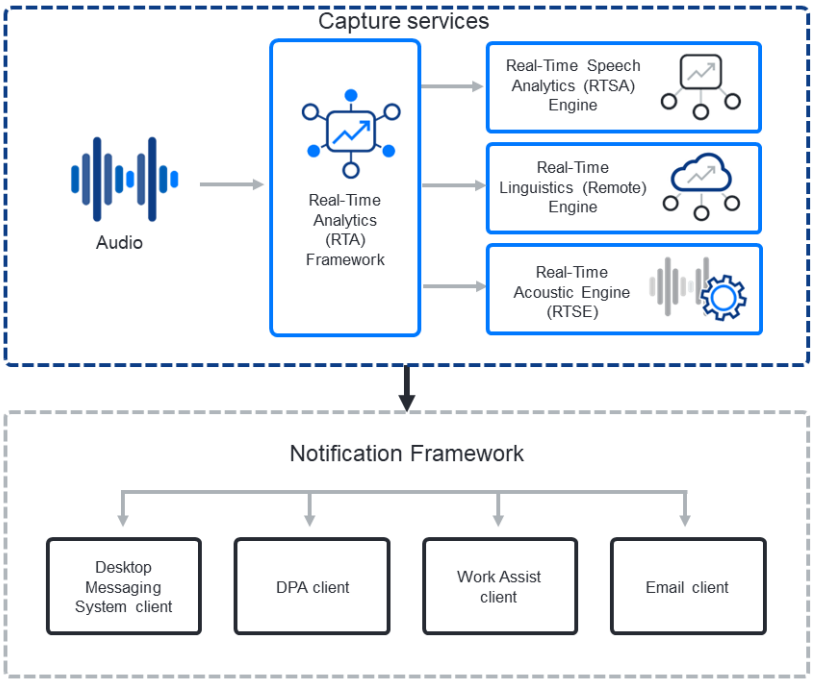
Categories for detection of terms in the audio flow

The Linguistic module comprises a set of predefined categories. The predefined set of categories includes Escalations, Complaints, and two sentiment categories to detect Positive and Negative Customer Sentiment. If Sensitive Data Masking is enabled, then the predefined Speech-driven masking category is also available.

If you have Speech Analytics, you can create your own custom real-time categories in Speech Analytics, in addition to the predefined categories. Creating custom real-time categories improves the engine's transcription accuracy, and enhances the precision of category hits.

Real-Time Agent Assist architecture

The RTAA acoustic and linguistic modules are part of the Capture services. Notification modules, such as Work Assist and desktop messaging, are part of the Notification Framework.



Capture services

The Real Time Analytics (RTA) Framework orchestrates real-time engines, modules, and services to implement RTAA.

RTA determines which RTAA rule to process for the real-time interaction. RTA then sends the metadata and audio to the Real-Time Acoustics engine, Real-Time Linguistic (remote) engine, or Real-Time Speech Analytics engine. If there are acoustic events or category hits that match the conditions defined, RTA receives the events detected, and forwards them to the Notification Framework.

Notification Framework

The Notification Framework orchestrates the notifications and alerts configured for the real-time event according to the rules defined. The Notification Framework displays the notifications through the Work Assist client, Desktop Messaging System client, Desktop and Process Analytics (DPA) client, or email notifications.

- **Work Assist client:** Sends notifications to the Work Assist desktop application.
- **Desktop Messaging System client:** Sends notifications to the desktops belonging to the employee, the supervisor, or specific pre-defined desktops.
- **DPA client:** Sends notifications or triggers actions on the desktops belonging to the employee or

the supervisor.

- **Email client:** Sends email notifications to designated employees.

Related topics

Real-Time Agent Assist overview, page 7
Real-Time Agent Assist setup , page 15
Real-Time Agent Assist data analysis, page 24

Cloud real-time transcription considerations

> The considerations below apply to RTAA deployments in which real-time transcription is performed in the cloud using the Real-Time Linguistic (remote) transcription service.

The Real-Time Linguistic (remote) engine provides real-time transcription in the cloud. Performing real-time transcription remotely allows for higher transcription accuracy and frees up recorder resources.

When consuming the Real-Time Linguistic (remote) engine, interactions and transcriptions containing sensitive data are streamed outside the enterprise. The service implements important security measures to ensure that all data is transported securely.

Additionally, several bandwidth and network quality considerations must be taken into account to ensure consistent quality of service.

Security

The Real-Time Linguistic (remote) engine implements the following security measures:

- The service authenticates the client application as having valid Azure credentials for daemon flow (service-to-service communication), and verifies that the application has permissions to consume the service.
- The service endpoint uses the TLS 1.2 protocol, enforcing encrypted communication over a secure web socket. Because a web socket is a bi-directional channel, both inbound and outbound packets (audio and text) are secured during transport. The contents of the packets are not encrypted in addition to the channel encryption.
- All communication between internal cloud services uses TLS 1.2.
- The service does not store data permanently. During internal routing between service components, some short-term caching of single data packets occurs for up to 1 second. The cache is encrypted using a strong key managed in the NCI vault.
- A single interaction is spread into audio packets of 0.5 seconds each, and text packets of a few words each. The packets are multiplexed into a single regional pipeline that serves all customers of that region. All packets of a single interaction are guaranteed to reach the same transcription engine instance, and the transcribed text packets of that interaction are guaranteed to return to the originating web socket. If the service gets disconnected, from that point forward the interaction transcription is abandoned to eliminate the chances of routing errors.
- The logs do not contain any sensitive data, such as transcriptions.
- The use of a VPN for secure access is optional.

Bandwidth

Transcription accuracy is highly dependent on the audio quality. High audio quality is usually associated with larger audio data size per second.

The Real-Time Linguistic (remote) engine can transcribe audio streamed in either PCM or G.711 format. The Recorder streams audio in G.711 format, which takes up half the amount of bandwidth of PCM.

The total required bandwidth to stream the audio is the number of concurrent interactions multiplied by 19.5 KB/sec. For example, 500 concurrent interactions requires up to 10 MB/second.

The calculation is based on the following assumptions:

- G.711 uses 8 KB/channel/second.
- Audio is streamed from the Recorder in packets of approximately 0.5 seconds.
- Returned text packets are approximately 1 KB every 2 seconds.
- The header size per packet is 0.5 KB.
- During a stereo interaction, every second, 4 audio packets and 2 halves of text packets are transmitted.
- The packet sizes are calculated as follows:
  - Audio packet size: 8000 / 2 + 500 = 4500 bytes/0.5 sec/channel
  - Text packet size: 1000 + 500 = 1500 bytes/2 sec/channel
- PCM format consumes twice the size of G.711, approximately 39 KB/sec/interaction.

Network quality

Network quality has a significant impact on quality of service. Poor network quality increases latency and causes WSS disconnects.

Consider the following network quality factors:

- The physical distance between the Recorder and the Real-Time Linguistic (remote) engine is an important factor. The Real-Time Linguistic (remote) engine should be consumed from the same region where the Recorder is deployed.
- Latency Round Trip Time (RTT) between a Recorder and the service should not exceed 200 ms.
- Poor network quality leads to packet loss, causing the RTT to increase, due to the need to resend packets.
- DX (Direct Connect), while not required, promotes reliability and is the only way to get an SLA from AWS.

RTAA notifications during an interaction

See how RTAA rule conditions and actions translate into real-time assistance during an interaction with different acoustic and linguistic events.

Chapter 2

Real-Time Agent Assist setup

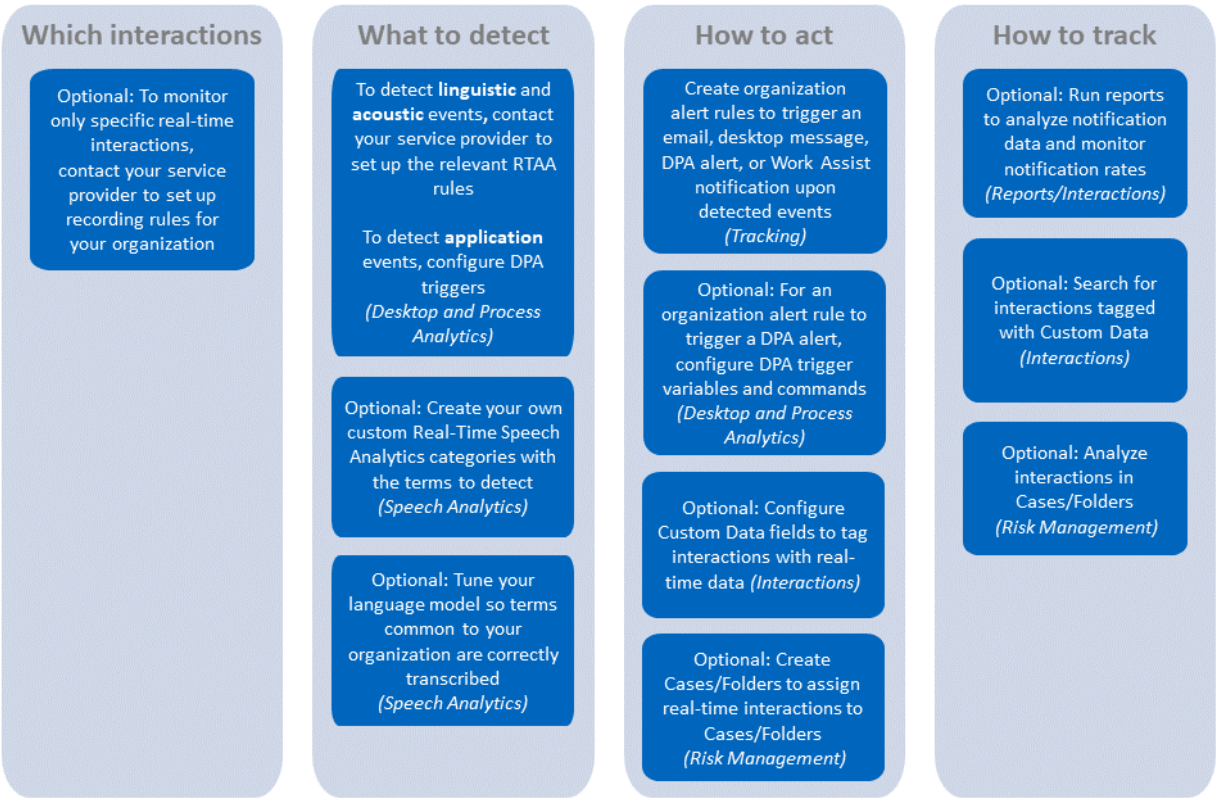
Set up Real-Time Agent Assist by configuring settings in different applications.

Topics

Real-Time Agent Assist setup summary

Set up Real-Time Agent Assist to determine:

- **Which interactions** to monitor.
- **What to detect** in the interactions.
- **How to act** based on the interaction's content (which actions to trigger).
- **How to track** the effectiveness of the solution and analyze data.



Related topics

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Real-Time Agent Assist setup workflow

Set up your RTAA solution by performing the tasks in the workflow. The workflow is divided into tasks that are mandatory to set up and work with RTAA, and those that are optional.

The **Responsible** column identifies which employee is responsible for performing each task.

After the setup is complete, your service provider creates the required RTAA rules using the various entities you configured in the setup.

Before you begin

- (Optional) To transcribe interactions in real time using the Real-Time Linguistic (remote) engine, contact your Service Provider to enable and configure the engine for your organization.
- (Optional) If your RTAA solution includes generating interaction summaries, and fetching interaction summaries and real-time transcriptions using an API call, contact your Service Provider to enable the services for your organization.
- (Optional) If your RTAA solution includes delivering notifications in the Work Assist desktop application, contact your Service Provider to enable and configure Work Assist for your organization.

Task	Mandatory?	Where to configure	Refer to...	Responsible
Configure DPA triggers for detecting application events If you have a Desktop and Process Analytics license and your RTAA solution includes triggering actions for detected application events, configure the relevant DPA triggers.	Mandatory for application notifications and events	**Desktop Analytics > Administration > Triggers**	Working with triggers *(Desktop and Process Analytics User Guide)*	Application Admin

Task	Mandatory?	Where to configure	Refer to...	Responsible
Create organization alert rules If your RTAA solution includes triggering actions for detected linguistic and acoustic events, create organization alert rules to send notifications. In the rule, select the relevant rule type and the type of notification to trigger. Set the rule type as follows: • To trigger a notification for **linguistic** or **acoustic events**, select rule type **Analytics Notifications (Organization)** • To trigger a notification for detected **application events**, select rule type **Desktop Analysis Alert**.	Mandatory for triggering notifications based on detected events (linguistic, acoustic, and application events). Not required for interaction summaries.	**Tracking > Notifications > Organization Rules**	Managing alert rules *(Framework Administration Guide)* Work Assist *(Framework Administration Guide)*  Show Me	Application Admin

Task	Mandatory?	Where to configure	Refer to...	Responsible
Create Custom Real-Time Speech Analytics categories If you have a Speech Analytics license, to supplement the default set of predefined categories, you can create custom real-time speech categories to trigger actions when terms and phrases in these categories are detected in interactions.	Optional	**Speech Analytics > Design > Real-Time Categories**	Design real-time categories *(Speech Analytics User Guide)*  Show Me	Speech Admin

Task	Mandatory?	Where to configure	Refer to...	Responsible
Configure DPA trigger variables and commands for DPA alerts If you have a Desktop and Process Analytics license, for an organization alert rule to trigger DPA alerts, configure DPA trigger variables and commands. Ensure that the name of the DPA trigger variable follows the correct format: The name must be **[organization_rule_name]_time**, where the **[organization_rule_name]** must be identical to the name of the organization alert rule you configured.	Mandatory for triggering notifications on the agent's DPA client, based on linguistic, acoustic, or application events. Not required for interaction summaries.	**Desktop Analytics > Administration > Trigger** **Desktop Analytics > Administration > Trigger Variables**	Working with trigger commands *(Desktop and Process Analytics User Guide)*	Application Admin

Task	Mandatory?	Where to configure	Refer to...	Responsible
Create Cases or Folders As part of the actions that you can trigger for events, you can assign the interactions to Cases (if Legal Hold is enabled) or to Folders (if Legal Hold is not enabled). To assign interactions to Cases or Folders, create them in Risk Management. You can then view those interactions in the Case or Folder to which it was assigned. To allow access to Cases or Folders, assign Cases or Folders to the relevant groups and roles in the Assignment Manager.	Optional	**Risk Management > Analyze > Cases/Folders** **Interactions > Administration > Assignment Manager**	Organizing interactions by case *(Risk Management Administration and User Guide)* Searching for interactions in Risk Management *(Risk Management Administration and User Guide)*	Application Admin

Task	Mandatory?	Where to configure	Refer to...	Responsible
Enable Custom Data fields As part of the actions that you can trigger for events, you can store the data generated in real time Custom Data fields that are tagged to interactions. To store the data in Custom Data fields, enable the Custom Data fields you require. To allow employees to view and use the Custom Data fields in searches, filters, and reports, assign them to the relevant groups and roles in the Assignment Manager	Optional	**Interactions > Administration > Custom Data** **Interactions > Administration > Assignment Manager**	*Custom Data Configuration Workflow*  Show Me	Application Admin

Task	Mandatory?	Where to configure	Refer to...	Responsible
Tune the language model If you have a Speech Analytics license, to ensure that the unique terms used in your business are recognized and correctly transcribed, tune the language model. Add terms such as product names, acronyms, and department names to the language model to improve real-time analytics effectiveness, making it easier to find interactions that contain the specific terms. **NOTE:** Tuning the language model is not available with the Real-Time Linguistic (remote) engine.	Optional	**Speech Analytics > Phonetics Boosting Application**	Add terms and phrases to project *(Phonetics Boosting User Guide)*	Speech Admin
Install the Work Assist client application If your RTAA solution includes delivering notifications in the Work Assist client application, install the Work Assist client application on user desktops.	Mandatory for delivering interaction summaries to employees.		Work Assist client *(Desktop Applications DRG and Installation Guide)*	Application Admin

Related topics

Real-Time Agent Assist setup summary, page 16

Chapter 3

Real-Time Agent Assist data analysis

After deploying Real-Time Agent Assist, you can analyze notification data and run reports to verify effectiveness.

Topics

Run reports

To analyze notification data and monitor notification rates, you can run specific reports.

Procedure

- Go to **Interactions > Analysis Reports > Analysis Reports**, and run:
  - Cross Correlation
  - Interaction Metrics Distribution
- Go to **Reports > Requests & Results > Instances > DPA Event Triggering Reports**, and run:
  - Trigger Count
  - Trigger Count for Self
  - Trigger Count with Keywords

Related information

Create analysis reports *(Interactions User Guide)*
Event Triggering reports *(WFO Reports User Guide)*

Search interactions

If the actions for the RTAA rules include either Custom Data tagging or Case/Folder assignment, review those interactions in the Interactions or Risk Management applications.

Procedure

1. To search for interactions based on the Custom Data values that were tagged during RTAA processing, in the Risk Management or Interactions application, go to **Advanced Search**.
2. To view interactions assigned to a Case or Folder, if **Legal Hold** is enabled, go to **Risk Management > Analyze > Cases**. Otherwise, go to **Risk Management > Analyze > Folders.**

Related information

Search in Interactions *(Interactions User Guide)*

Searching for interactions in Risk Management *(Risk Management Administration and User Guide)*