Evaluation Workflow

Evaluation workflows allow for greater customization of the agent evaluation process. By using a workflow process your agent evaluations can:

- Be evaluated by multiple evaluators
- Assign evaluations to be reviewed by users who are not the evaluator
- Perform agent self-evaluations
- Automatically assign media for evaluation
- Pass through multiple states, each with customizable permissions

Adding a Workflow

Users with the Create Workflow permission in their Security Profile can add workflows.

To add workflows, click the ⚒ navigation icon and then click the Evaluation Workflow link from the administration sub-menu. The Workflow tab displays containing the list of workflows. To add a workflow, complete the following steps:

1. Click the ➕ Add Workflow button on the action bar located at the top right of the workflow table.
2. A new tab will open with New Workflow as the tab title.
3. Enter a valid Workflow Name and select at least one Scorecard.
4. See Editing Workflows for more details.
Click the Save button on the action bar located at the top right of the edit workflow tab. The tab will refresh, and the workflow name will now display as the tab title.

Editing a Workflow

To edit workflows, click the ⚒ navigation icon and then click the Evaluation Workflow link from the administration sub-menu. The Workflow tab displays containing the list of workflows. To edit a workflow, click the ✏ icon on the workflow row you wish to edit. A new tab will open with the workflow name as the tab title.

The workflow editor contains two main parts: the property pane on the left (containing workflow, state and transition properties) and the flowchart editor on the right.
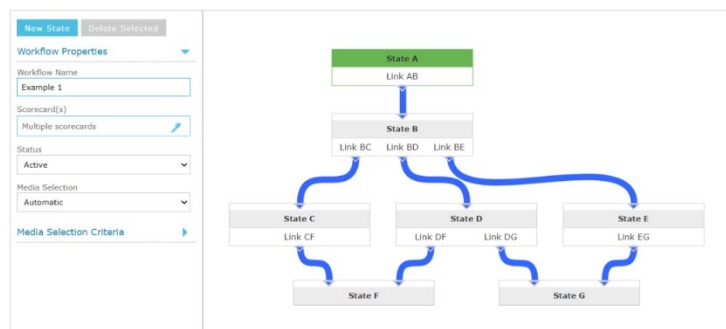
Workflow Properties

Workflow properties are properties that pertain to the entire workflow.

- **Workflow Name:** a display name for the workflow

- **Scorecard(s)**: one or more scorecards associated with the workflow. When creating an evaluation based on this workflow, only these scorecards will be selectable.

- **Status**: active workflows can be selected for new evaluations. Inactive workflows cannot. While designing a new workflow it is advisable to leave it as inactive until ready for use.

- **Media Selection**: the media selection mode. Choose from None (evaluations without media), Manual (user selected media) or Automatic (media is automatically selected based on the media selection criteria.

Media Selection Criteria

The media selection criteria are only applicable when the Automatic media selection mode is selected.

- **Media Type**: select one or more media types

- **Date**: select a date range (based on media start time) from Any, Last x days or a specific start and end date.

- **Duration**: select a duration criteria (based on the length of the recorded media)

- **Direction**: select a media direction (inbound, outbound or both).

- **Flags**: specify one or more flag rules to search for

State Properties

State properties are properties that pertain to the **selected** state object in the flowchart editor only. Each state object can have a different set of properties.

- **Label**: a display name for the state.

- **Assign Rights**: a list of users and/or groups that can have assign rights (i.e., be the assigned to user) of an evaluation when it is in this workflow state. See the Users and Groups Dialog section below for more information.

- **Initial Workflow State**: the starting state for the workflow. Evaluations created using this workflow will be set to this state initially. Only one state can be selected as the initial state.

- **Disable Media Change:** if this option is selected, then media cannot be added to the evaluation when the evaluation is in this workflow state.

- **Disable Scorecard Change:** if this option is selected, then the evaluation scores cannot be changed when the evaluation is in this workflow state.

- **Allow Due Dates:** Due dates can be set on the workflow state. This is the date the evaluation is due to be either transitioned to the next state or the evaluation finalized (if this state is the final state). The available options are Off (default), On or Mandatory. If either On or Mandatory is selected, then a due date option will be available to the evaluator in the transition dialog when performing an evaluation using this workflow.

- **Send Reminder:** If a due date option is selected (On or Mandatory), then this additional option is available to send an email reminder to the current assigned to user at x days before the due date.

Transition Properties

Transition properties are properties that pertain to the **selected** transition object in the flowchart editor only. Each transition object can have a different set of properties.

- **Label**: a display name for the transition.

- **Allow Rights**: a list of users and/or groups that are allowed to perform the transition (i.e., move the evaluation to the next state). See the Users and Groups Dialog section below for more information.

- **Show Comments**: determines whether the transition dialog includes a text box to enter comments. Can be set to Off, On or Mandatory (the user must enter a comment).

Users and Groups Dialog

The users and groups dialogs are used when selecting edit rights for a workflow state or allow rights for a workflow transition. It contains users, groups, and conditional users on the right (non-members) to add to the members list on the left, and vice versa.

- Users are represented by this 👤 icon.

- Groups are represented by this 👥 icon.

- Conditional users are represented by this 🗂 icon. These are users that are resolved at runtime rather than specific users (i.e., the evaluator and evaluatee, direct reports and managers)