Avaya™ Interaction Center

Release 6.1

HRQ Administration

585-248-509
Issue 2.1
August 2003

Notice

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Preventing toll fraud

"Toll fraud" is the unauthorized use of your telecommunications system by an unauthorized party (for example, anyone who is not a corporate employee, agent, subcontractor, or person working on your company's behalf). Be aware that there may be a risk of toll fraud associated with your system and that, if toll fraud occurs, it can result in substantial additional charges for your telecommunications services.

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Providing telecommunications security

Telecommunications security (of voice, data, and video communications) is the prevention of any type of intrusion to (that is, either unauthorized or malicious access to or use of) your company's telecommunications equipment by some party.

Your company's "telecommunications equipment" includes both this Avaya product and any other voice/data/video equipment that could be accessed via this Avaya product (that is, "networked equipment").

An "outside party" is anyone who is not a corporate employee, agent, subcontractor, or person working on your company's behalf. Whereas, a "malicious party" is anyone (including someone who may be otherwise authorized) who accesses your telecommunications equipment with either malicious or mischievous intent.

Such intrusions may be either to/through synchronous (time-multiplexed and/or circuit-based) or asynchronous (character-, message-, or packet-based) equipment or interfaces for reasons of:

- Use (of capabilities special to the accessed equipment)
- Theft (such as, of intellectual property, financial assets, or toll-facility access)
- Eavesdropping (privacy invasions to humans)
- Mischief (troubling, but apparently innocuous, tampering)
- Harm (such as harmful tampering, data loss or alteration, regardless of motive or intent)

Be aware that there may be a risk of unauthorized intrusions associated with your system and/or its networked equipment. Also realize that, if such an intrusion should occur, it could result in a variety of losses to your company (including, but not limited to, human and data privacy, intellectual property, material assets, financial resources, labor costs, and legal costs).

Your responsibility for your company's telecommunications security

The final responsibility for securing both this system and its networked equipment rests with you, an Avaya customer's system administrator, your telecommunications peers, and your managers. Base the fulfillment of your responsibility on acquired knowledge and resources from a variety of sources, including, but not limited to:

- Installation documents
- System administration documents
- Security documents
- Hardware-/software-based security tools
- Shared information between you and your peers
- Telecommunications security experts

To prevent intrusions to your telecommunications equipment, you and your peers should carefully program and configure:

- Your Avaya-provided telecommunications systems and their interfaces
- Your Avaya-provided software applications, as well as their underlying hardware/software platforms and interfaces
- Any other equipment networked to your Avaya products.

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Avaya support

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http://www.avaya.com

Select **Support**, then select **Escalation Lists**. This Web site includes telephone numbers for escalation within the United States. For escalation telephone numbers outside the United States, select **Global Escalation List**.

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Avaya provides training for Avaya Operational Analyst. For more information, contact Avaya University at:

Web site: http://www.avaya-learning.com/logon_form.asp

E-mail address: avaya.u.helpdesk@accenture.com

US telephone: 1-800-288-5327

Outside US telephone: +1-303-406-6089

Comments

To comment on this document, send e-mail to crminfodev@avaya.com.

Acknowledgment

This document was written by the CRM Information Development group.

Avaya™ Interaction Center
Release 6.1
HRQ Administration

Contents

Before You Begin

This section includes the following topics:

Typographical Conventions

This guide uses the following font conventions:

Font Type	Meaning
`command`	This font signifies commands, information that you enter into the computer, or information contained in a file on your computer.
`commandvariable`	This font indicates variables in a command string.
italics	This font is used to add emphasis to important words and for references to other chapter names and manual titles.
link	Blue underlined text in online documents indicates a hypertext jump to related information. To view the related material, click the blue underlined text.

Notes, Tips, and Cautions

Note:

A note calls attention to important information.

Important:

An important note calls attention to a situation that has the potential to cause serious inconvenience or other similar repercussions.

Tip:

A tip offers additional how-to advice.

CAUTION:

A caution points out actions that may lead to data loss or other serious problems.

Contacting Technical Support

If you are having trouble using Avaya software, you should:

1. Retry the action. Carefully follow the instructions in written or online documentation.
2. Check the documentation that came with your hardware for maintenance or hardware-related issues.
3. Note the sequence of events that led to the problem and the exact messages displayed. Have the Avaya documentation available.
4. If you continue to have a problem, contact Avaya Technical Support by:
   - Logging in to the Avaya Technical Support Web site http://www.avaya.com/support/qq
   - Calling or faxing one of the following numbers from 8:30 a.m. to 8:30 p.m. (Eastern Standard Time), Monday through Friday (excluding holidays):
     - Toll free in the U.S. and Canada: 1-888-TECH-SPT (1-888-832-4778)
     - Direct line for international and domestic calls: 1-512-425-2201
     - Direct line for faxes: 1-512-997-4330

- Sending email with your question or problem to crmsupport@avaya.com. You may be asked to email one or more files to Technical Support for analysis of your application and its environment.

Note:

If you have difficulty reaching Avaya Technical Support through the above URL or email address, please go to http://www.avaya.com for further information.

Product Documentation

Most Avaya product documentation is available in both printed and online form. However, some reference material is available only online, and certain information is available only in printed form. A PDF document with detailed information about all of the documentation for the Avaya Interaction Center is included in the `Doc` directory on the product CD-ROM. This PDF document is also included on the separate documentation CD-ROM.

Readme File

The Readme file is a PDF file included on the Avaya Interaction Center software CD-ROM. This file contains important information that was collected too late for inclusion in the printed documentation. The Readme file can include installation instructions, system requirements, information on new product features and enhancements, suggested work-arounds to known problems, and other information critical to successfully installing and using your Avaya software. Avaya may also deliver an Addendum to the Readme, which will be posted on the Avaya Technical Support Website. The Readme Addendum will contain similar information uncovered after the manufacture of the product CD-ROM. Review the Readme file and the Readme Addendum before you install your new Avaya software.

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The electronic documentation (in PDF or HTML format) for each Avaya Interaction Center product is installed automatically with the program. Electronic documentation for the entire Avaya product suite is included on the product CD-ROM and the documentation CD-ROM.

You can also view the documentation set online at http://www.avayadocs.com.

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- Through email at Avaya.U.Helpdesk@accenture.com

Chapter 1: Overview

HRQ is designed to help you run your human resources center as efficiently as possible. It provides three focuses that are designed to help:

- HR agents take calls
- System administrators perform general administration tasks.

This section contains the following topics:

- Introduction to HRQ on page 11
- Logging in to the HRQ Business Application on page 12
- The HRQ GUI on page 12

Introduction to HRQ

The one thing that all Human Resources (HR) centers have is data. They collect information about employees, benefits packages, procedures, and tasks. Often, management likes to keep track of how many employees call an HR center, and what sorts of questions they ask. That information gets tossed into the general data pool as well.

Raw data, though, isn't meaningful unless it's organized in some fashion. Databases store information in a predictable way. Users can then search for a particular piece of data, or generate reports and look at groups of data points.

With a database, records are linked together so you can call up John Smith's employee record and find out what benefits package he's enrolled in and how much of his deductible he's already paid.

A database is only as useful as the graphical user interface (GUI) you use to access it. If you can't find the particular screen where you type in your search phrase, or if you need to be a programmer to get the command syntax right, then all of the information might as well be locked in a vault.

HRQ lets agents find the information they need as quickly as possible. It interfaces with your existing HR database so agents can access employee and benefit information, and adds the facility to track the types of calls that come into your HR center and the issues those calls generate.

Logging in to the HRQ Business Application

When you log into HRQ, you are required to specify a username and password. All agents have an important responsibility to help keep the system secure.by observing the following rules:

- Choose a password that is easy to remember but impossible for anyone else to guess.
- Make sure that your password meets your site requirements with regards to length and type of characters (either alphabetic, numeric, or a mixture of both). If you need more information about the password rules at your site, contact your system administrator.
- Never write down your password.
- Never share your password with anyone.
- Contact your administrator immediately if you suspect any security problems, such as a computer “virus,” unusually slow response times, or other abnormal behavior of the system.

The HRQ GUI

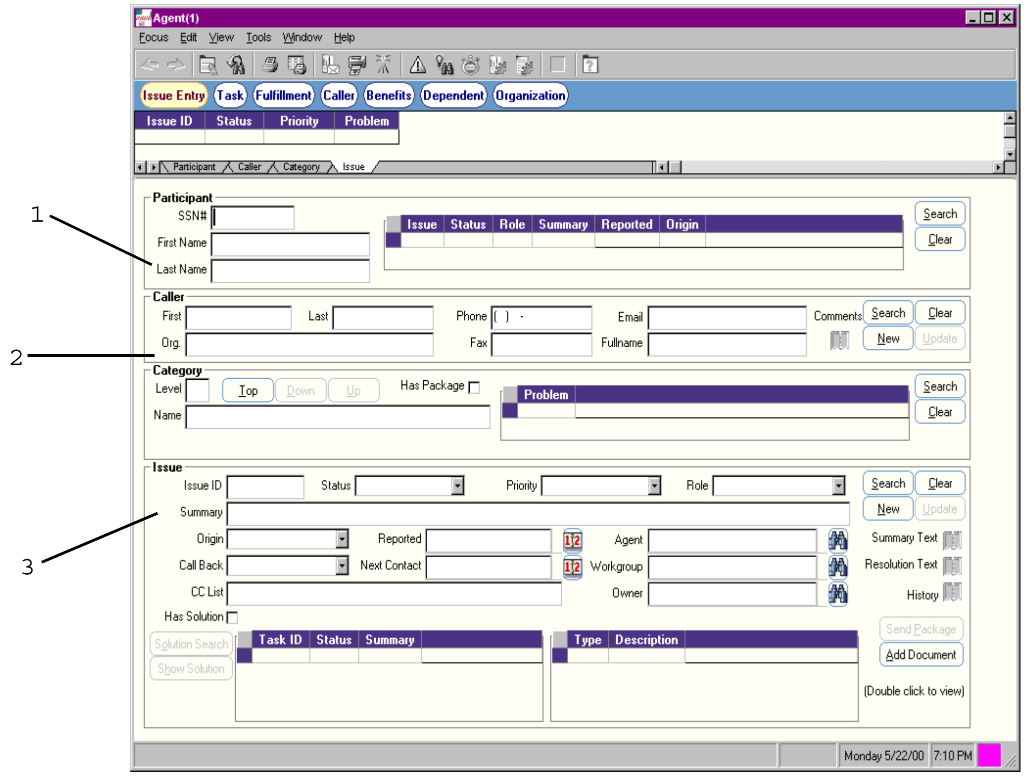
The out-of-the-box HRQ application covers the basic tasks your agents perform, but all of its processes can be customized for your specific needs and business processes. When you invoke HRQ with Avaya Agent, you can access the various focuses within the application from the Avaya Agent Start menu. When you use HRQ alone, you can access those focuses through any focus File menu.

Note:

This book describes the out-of-the-box application, and discusses the basic administration tasks. However, if the system developers at your site have customized the application using the Database Designer, then the screenshots herein may not match what you see on your screen.

Application focus

A sample of the GUI follows:

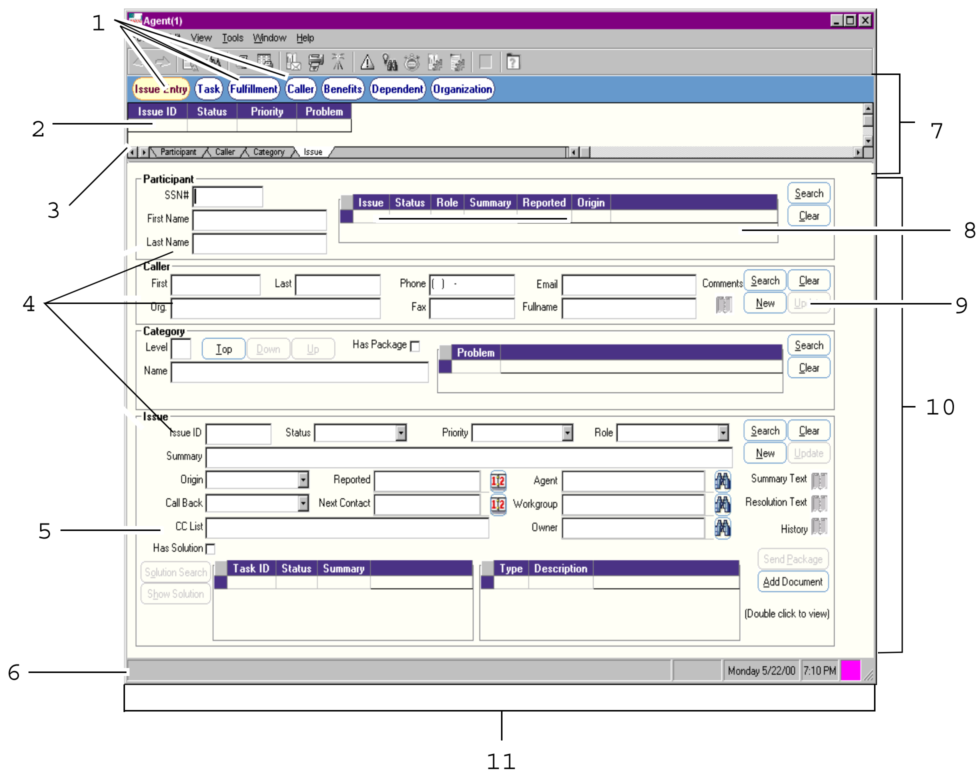


1. **This group shows information about the employee enrolled in the benefits plan.**
2. **This group shows information about the person calling, and their relationship to the participant.**
3. **This group shows what the caller is asking about and what is being/was done to solve the problem.**

By organizing the data in this manner, the agent can glance at the screen and get an immediate overview of all the calls made by the selected participant, or by someone calling on behalf of the participant, simply by looking at the IFB (in-form browser) in the Participant group. He or she can search for any past issues the participant has registered, and check the status of those issues.

With HRQ, the data in your database is both organized and instantly accessible to any agent who needs it. Because data also needs to be available when it's needed, the GUI is organized into separate focuses, which define work flows or particular activities. For example, you might have an agent focus that contains the information the agent needs to record/view when people call in, and an administration focus that lets the system administrator set up the HRQ environment.

Each focus contains tabs, which are comprised of a browser section and a form section. Each browser shows information that's returned in response to a database query. Each form contains groups, each of which shows data from a particular table in the database. A sample HRQ focus follows:



1. **Buttons that access the other forms in the focus**
2. **Browser**
3. **Browser Tabs**
4. **Groups**
5. **Field**
6. **Status Bar**
7. **Browser Section**
8. **IFB**
9. **Command Button**
10. **Data Section**
11. **Focus**

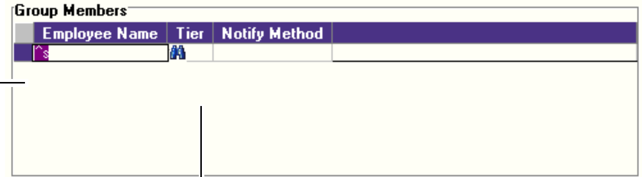
This GUI is completely customizable by your application developers to reflect your workflows and processes. As the HRQ Administrator, your task is to take the system that the developers have put together and set up the data that the agents will actually be using, and the issue and task templates that will make it easier for your agents to handle a call.

Using in-form browsers

In-form browsers (IFBs) are similar to small Excel spreadsheets that are embedded in a group. All IFBs have several special features:

The gray square at the beginning of each row is the selection button. Click it to select the row.

Once a row is selected, you can delete it by right clicking the selection button and choosing Delete.

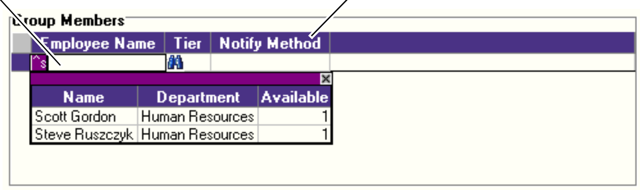


When you click in some fields, a Search icon appears. Optionally, type search constraints in the field, and click the icon to get a pop up browser showing all possible values for the field that match the search constraints. Click on the appropriate field in the pop up browser to use that value.

When you search in fields, you can use boolean search operators such as the "^" in this example.

For details on the advanced search operators you can use, see the *Avaya Business Application Tools User Guide*.

To sort the IFB by a particular column, click on the column heading.



Chapter 2: Overview of the HRQ agent workflow

HRQ is designed to integrate with your Human Resources Management System (HRMS) so that agents can track who's calling with benefits questions, what information those callers are given, and what tasks, if any, need to be completed to fulfill a caller's request.

As the administrator for the HRQ application, you need to set up the building blocks that will let the agents do their job faster and more effectively. In order to put these blocks in perspective, this chapter provides a walk through of a typical call and highlights the information that it's your responsibility to provide.

For a complete description of the administrator's tasks, see Administration task flow on page 23. For a complete description of the agent's tasks, see Agent task flow on page 45.

This section contains the following topics:

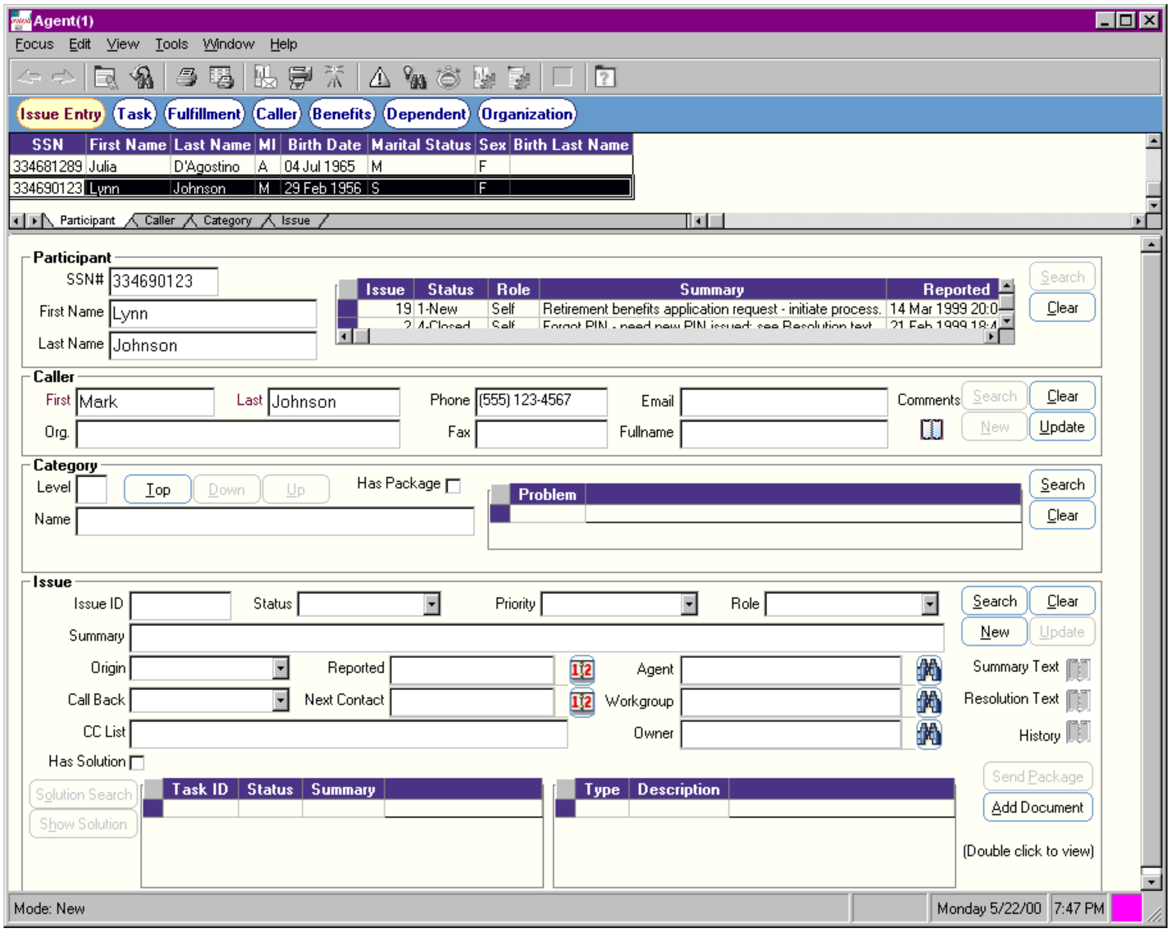
Handling a typical call

In this scenario, Lynn Johnson is the participant in the company's benefits plan, and her insurance also covers her husband Mark. Mark has forgotten their PIN number, and he needs information on the 401(k) plans because they're considering changing how much money Lynn saves from each paycheck.

Getting caller and participant information

The agent greets Mark and asks him the name of the Participant he's calling about. Then the agent searches for, and selects, Lynn's name from the database. In order for the agent to proceed, the Participant's record must already be in the HRMS database.

Knowing he's not talking to Lynn, the agent gets Mark's name and searches in the Caller group to see whether he has called before. If he has, the agent selects Mark's name from the browser. If not, he creates a new record and fills in Mark's name. A sample of the HRQ GUI follows:

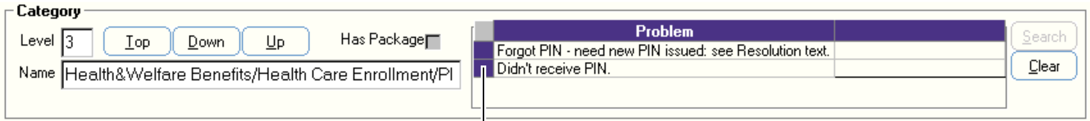


Opening and resolving an issue

Mark says that he's lost his pin number and needs a new one. The agent asks him to wait a moment and selects the appropriate category. Categories are something that you, as the HRQ Administrator, set up ahead of time, and they provide a way to report on the type of calls coming into your HR center as well as providing default information for the agents to use in the form of issue and task templates. (For details, see Working with categories and templates on page 26.)

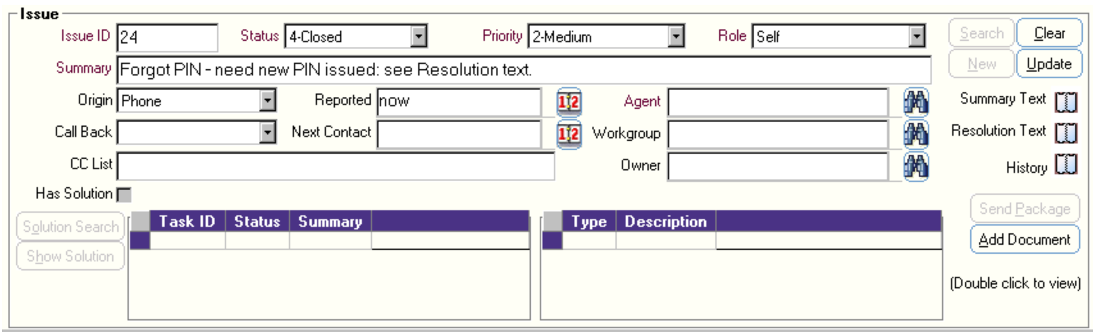
Categories also help group the types of calls that come into your HR center in a logical hierarchy so you can see what areas of your benefits plans might need more explanation, or what information needs to be reissued to your employees. If your center is constantly getting calls about dental coverage, then you might need to issue new explanatory information so your employees can answer some of their own questions.

For this example, let's say there is a general category called Health&Welfare Benefits. Under that, there are subcategories for Health Care Enrollment, Insurance Eligibility Requests, Flex Spending Acct (HECRA, DCRA), Leave Billing, Life Insurance, and so on. The agent picks `Health&Welfare Benefits/Health Care Enrollment/PIN Problem` in the Category group, and a list of common problems (FAQs that are really Issue Templates) appears in the in-form browser (IFB).



IFB selection box for new PIN

Forgotten PINs happens to be one of the templates listed in the Problem IFB, so the agent would apply the Issue Template associated with the category by double clicking on the selection box in the appropriate row of the IFB. HRQ opens a new Issue record and fills in whatever information it can based on the selected template.



The agent then takes whatever additional information is needed and clicks Update. At that point, if the agent wants to try and answer the question in more depth, he can click the Solution Search button to launch QKnowledge, Avaya IC's document search and retrieval mechanism. He searches for information on pin numbers, which he relays to Mark. The agent then links the Issue to the document he found in QKnowledge.

No tasks are needed to resolve this issue, so the agent updates the Issue record and moves on to the next part of Mark's call.

Sending literature

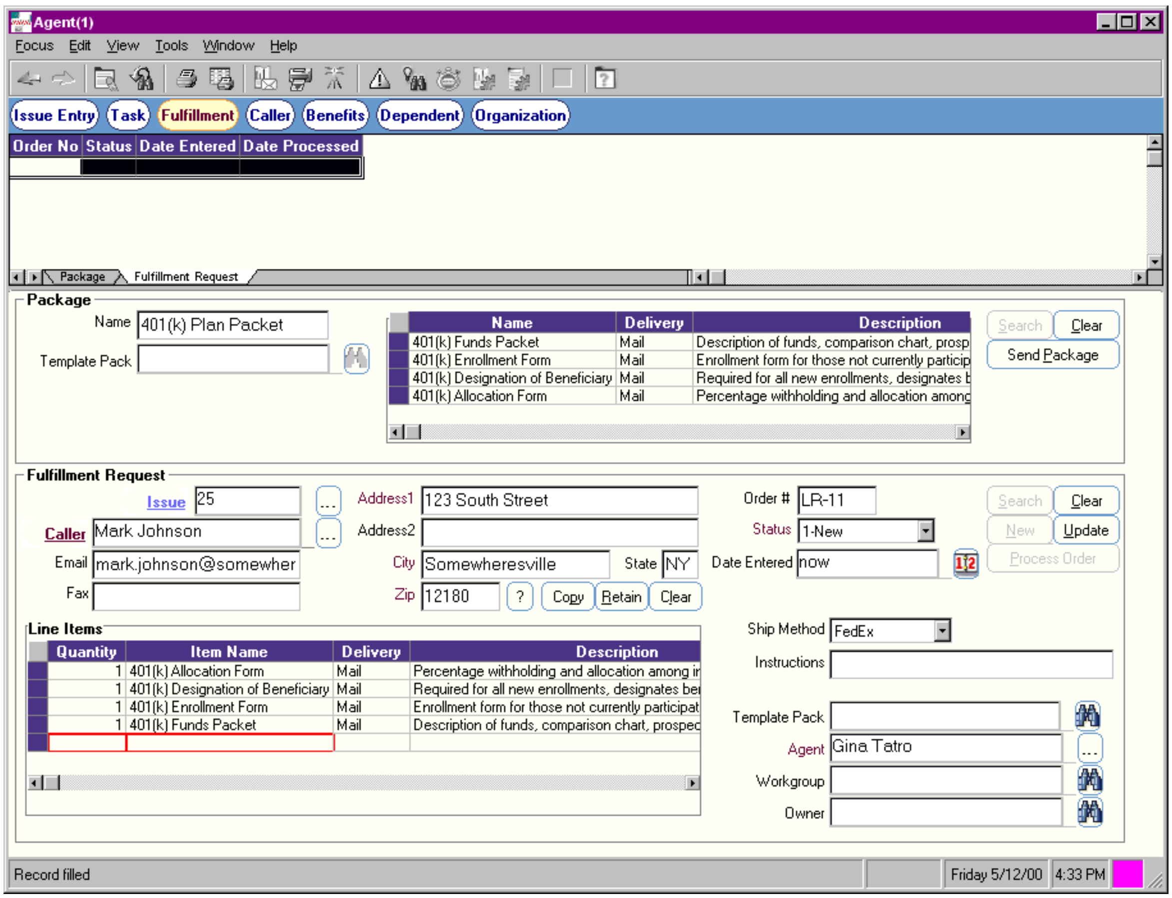
When the agent asks Mark if he needs anything else, Mark replies that they need a full set of documentation on the 401(k) plan because Lynn's thinking of changing the amount she's saving each paycheck.

The agent has two choices when dealing with fulfillment: he can select a Category first and hope it has an attached package that will be backfilled into the Fulfillment form, or he can go directly to the Fulfillment form and search for the appropriate fulfillment package.

Note:

Packages are another thing the Administrator sets up beforehand. They contain one or more pieces of literature that form a group, like all of the brochures for the health care plans, all of the forms a new hire needs to read and possibly sign, and so on.

When the agent selects a package, the individual items are transferred to the Literature Request group, where the agent can add, delete, or change the quantity of the various items.



Once the agent has selected all of the requested items, he or she finds out how the package should be sent and takes (or verifies) the required information. Once that's done, the agent clicks Update and the system logs the fulfillment request. If there are physical pieces in the order, HRQ makes sure that there are enough left in the "available" inventory to cover the order. If so, it increments the "committed" inventory for those items. (HRQ doesn't decrement the "available" inventory until the order is actually processed.) If the stock of the item goes below the reorder level you specified when you added it to the database, HRQ sends a message to the item’s owner to let them know it’s time to reorder. (For details, see Working with fulfillment packages on page 29.)

Issues involving tasks

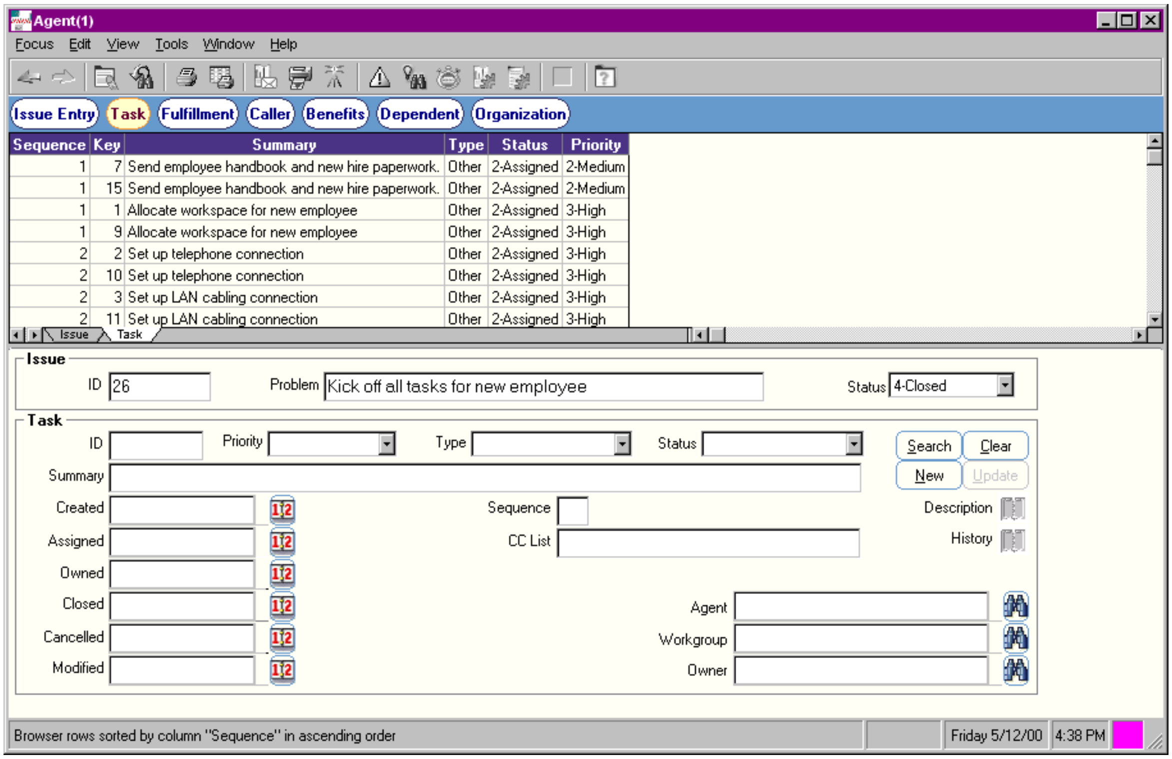
In this scenario, let’s assume that Judy Collins calls in and tells the agent she has a new employee named Fred Banks starting next week. The agent searches for Judy’s name in the Caller group, and selects her name from the browser or enters a new record if she hasn’t called before.

The agent asks Judy if anything special needs to be done, and Judy replies that it’s a standard new hire. The agent thanks her and hangs up because he/she can complete the call without taking up Judy’s time.

First the agent searches for the correct category, and finds Payroll/New Employee. As the Administrator, you’ve set up an Issue Template and Task Templates for that category, because all new hires go through a standard procedure.

The agent applies the category by double clicking the selection button in the IFB, and fills out any other required information in the Issue group. When he/she clicks Update, HRQ looks to see if any task templates were associated with the category, and, if it finds any, it asks the agent whether to create task records. If the agent clicks Yes, HRQ puts in the appropriate information and tells the agent how many tasks have been created. Once tasks are entered, the issue cannot be closed until all of those tasks are completed.

The agent can then go to the Task form to see if any of the tasks are things he/she should do.



How much the agent has left to do depends on what, if anything, is not in your Issue and Task templates. It's possible that agents can actually open a new issue, import template information, and close it automatically if you've got things set up that way. (For more information on templates, see Working with categories and templates on page 26.)

For a more detailed look at all the tasks the HRQ Administrator needs to perform, see Administration task flow on page 23.

Chapter 3: Administration task flow

This chapter describes the Administrative tasks you need to complete so that your company's agents can use HRQ, and puts those tasks into perspective by explaining their impact on how the system works.

Most of these tasks are based on forms in the HRQ Administration focus or in the common administration tool, IC Manager.

To administer your HRQ system:

1. Set up your application profile. For details, see Setting up your HRQ profile.
2. Enter a record for each employee as described in *IC Administration Volume 2: Agents, Customers, & Queues*.
3. If you want to organize your agents into workgroups, create and populate those workgroups as described in *IC Administration Volume 2: Agents, Customers, & Queues*.
4. If you want to track the calls your HR center receives based on their type, set up categories as described in Categories.
5. If you want to set up templates that allow agents to fill in boilerplate information with a single mouse click, follow the steps described in Issue templates and Task templates.
6. If you want to create fulfillment packages so that your agents can send callers literature collections quickly and easily, follow the steps in Working with fulfillment packages.
7. If you want HRQ to send a notification when certain records change their status, create actions as described in Actions.
8. If you want HRQ to send a notification when certain records do *not* change their status in a given amount of time, create escalations as described in Escalations.
9. If you want to set up a calendar that agents can use to designate when they are available, see the *Business Application Tools User Guide*.

This section contains the following topics:

- Working with fulfillment packages on page 29
- Working with actions and escalations on page 31
- Testing your participant and benefits integration on page 37

Setting up your HRQ profile

The application profile lets you set some basic information that will be used by everyone who's logged into the HRQ system. HRQ does as much processing as it can behind the scenes, and the information you enter here lets your agents get on with their jobs without worrying about some of the details.

With the Profile form, you can specify:

- The default problem line and category for fulfillment items. When an agent creates a fulfillment order without first creating an issue, the system creates an associated Issue record so the order can be connected to the appropriate participant and caller. The text in the problem line field becomes the subject line, and the category becomes the category, of the automatically-created Issue record. (For more information, see Working with categories and templates on page 26.)
- The default fulfillment batch. When an agent creates a fulfillment order, any associated letters will be sent to this print batch.
- The default pick list. When an agent creates a fulfillment order that requires physical pieces to be pulled from the shelves, this is the report that runs to create the pick list. The results are automatically saved in the pick list directory.
- The default subject line. When an agent sends out a fulfillment item via email or fax, this becomes the subject line of the message.

Viewing employees and workgroups

The Employee and Workgroup forms in the Application Administration or the Notification Administration focus let you view the employee records and see who's assigned to which workgroups. For details about creating or changing employees and workgroups, see the *IC Administration Volume 2: Agents, Customers, & Queues.*

Setting up WebQ authorization for employees

WebQ is the Avaya product that allows organizations to grant HTTP or browser access to certain database tables for internal support agents, external support agents, or customers. The differences between support agents and customers is defined by which tables they may access. A support agent can initiate an unconstrained search across all tables, while a customer is limited to searching only tables which contain their calls. Additionally, they may only update their own calls, create new calls, or initiate a solution search.

Note:

If you want to designate an employee as a Support Agent, the Support Role checkbox must be enabled for that employee in the IC Manager. For details, see the *IC Administration Volume 2: Agents, Customers, & Queues.*

Employees designated as customers may only examine their own calls, search for solutions, or create new calls. Each customer must have a support agent explicitly assigned to them before they are granted access to the database. That support agent is also responsible for any escalations from the customers to which they are assigned.

When a user logs into WebQ, The application determines whether he or she has support agent or customer privileges by matching the login id with the user type in the database. If the login id is not found, WebQ will not accept the login.

Adding a new WebQ user

To add a new WebQ user:

1. In the WebQ Authorization group, click New.
2. Type the name the user should log in with.
3. Add the employee's password.
4. Select the User Type:
   - Customer
   - Support Agent
5. Select the employee who logs in with this name.
6. If the employee is a Customer, select a support agent.
7. Click Update when you are finished.

Finding and changing existing WebQ users

You can use the WebQ Authorization form to search for all WebQ users in the database, or you can limit your search to user types.

When you have finished specifying the information you want to use to limit the list of WebQ users, click Search. The application displays a list of all WebQ users that meet the selected criteria in the browser.

If you want to find WebQ users that aren't limited to the specified information, click Clear and click Search

To change an existing WebQ user:

1. In the WebQ Authorization form, type the first few letters of the username and click Search.
2. Select the username you want to change from the browser.
3. Click Change.
4. Make your changes and click Update.

Working with categories and templates

Categories are a hierarchical way of organizing problems and issues for reporting. Issue and Task Templates give agents a quick way to enter common issues and automatically attach the appropriate tasks.

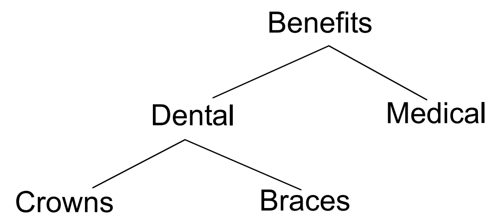
When agents select a category, HRQ automatically creates a new issue or task record and fills in whatever information it can. Any of it, however, can then be changed by the agent if the particular situation is a little different than the standard one.

Categories

Categories make your data more uniform because agents choose from a pre-defined set of options instead of typing in free-form text. Once you have standardized categories, you can use them as an assignment tool for any tasks that are created, and as a reporting tool so you can tell how many issues of a particular type your HR center is handling. When you generate a report, you can sort by category, get summary totals, and perform other statistical operations.

Categories are hierarchical and can have an unlimited depth. For example, a top-level category could be Benefits, which could contain two second level categories, Dental and

Medical. Furthermore, Dental could be broken down into two third level categories, Crowns and Braces. This structure would be pictured as:



When you set up your categories, you want to make sure they're unique so agents can quickly tell which one applies. For example, dental/cleaning and dental/preventative might not be useful categories because some agents might consider cleanings to be preventative.

You should also consider what kind of reports you want to generate. If some of your categories have only one or two issues per report, you probably have too fine a granularity. If you have dozens of issues per category, you might want to further divide those categories into subcategories.

Creating categories

To create categories, use the Category group on the Category form. For each category, enter a name and description. When you enter the category name, you specify the levels using forward slashes. For example, to add the third-level category Braces, you would enter the category name:

```
benefits/dental/braces
```

Optionally, you can enter a workgroup, which will be automatically assigned to an issue of the given category. You can also associate a fulfillment package with a category so agents can open an issue, select the category, and immediately find the right fulfillment package to send the caller.

Basing a new category on an existing one

When you're creating categories, you want the beginning levels to be exactly the same or HRQ won't know they're levels of the same category tree. The easy way to do this is to create your upper level categories and then use one of them as the starting point for your new category.

For example, let's say you've created benefits/dental/braces, and now you want to create a matching third-level category called crowns. To do so:

1. Select the benefits/dental/braces category in the browser so the record backfills into the Category group.

2. Click New in the Category group.

   HRQ creates a new Category record and copies the information from the previously-selected category into it.

3. Delete "braces" from the Category name and type "crowns".
4. Change any other information as appropriate.
5. Click Update.

Issue templates

Issue templates give your agents a fast and easy way to handle common calls. You can enter the default status, problem text, category, priority, and even the next contact information ahead of time so all the agents have to do is search for the appropriate template and click a button to have HRQ open a new issue and fill in the appropriate information. Issue templates are attached to categories, so you also get the benefit of any default information (like the workgroup) stored in the category record. Once HRQ has created the issue record, the agent can change any of the default information as appropriate.

To create issue templates, use the Issue Template group on the Category form. Don’t forget to enter the category name that the template is linked to in the Category field, or the agent won’t be able to access the template.

Task templates

Often, issues require a series of tasks to be performed before they can be closed, as when a new employee is hired and a phone, desk, computer, and computer accounts all need to be set up. You can attach one or more task templates to an issue template so when the agent selects the template, he or she also gets the tasks.

As with issues, the task templates contain default information that HRQ fills into the task records it automatically generates. This default information can be changed by the agent at any time.

To create task templates, use the Task Template group on the Category form. Don’t forget to enter the issue template name that the task is linked to in the Issue Template field, or the agents won’t be able to use the templates.

Working with fulfillment packages

A fulfillment package lets you coordinate sending several pieces of information to the caller without worrying that anything will be missed. Each package contains a template pack that contains a unique cover letter and any necessary forms (these can use variables so they can be personalized for the particular person) and the brochures, flyers, products, and other items that go together to form a single fulfillment order. These items can be both physical pieces and electronic files that will be emailed or faxed to the participant. (For details about using the Letter Generator to create a letter template, see the *Avaya Business Application Tools User Guide*.)

For example, if your company offers three different health and dental plans, then your fulfillment package might include a "summary of your choices" letter, information about the enrollment deadline contained in a text file that can be emailed, and all the various flyers and brochures from each of the health care companies.

These packages are not set in stone, however. When an agent selects a package as part of a literature order, HRQ adds the entire contents of the package to the order. The agent can then add or delete items from the order, or change the quantity on any of the items. Packages simply provide a good starting point for the agent so he or she knows what the caller may want to receive.

Setting up the fulfillment stock library

Before you create a package, you need to add a Stock Library record for each physical or electronic piece in your inventory, using the Fulfillment Stock form. The stock record contains the name and description of the item so agents know what they're sending, the delivery method, and either the location of an electronic file or the inventory and reorder information for a physical item.

Inventory tracking

When you set the Delivery Method on a stock item to Mail, the application knows it needs to keep track of how many of those items are available. When you create the item, you enter the starting inventory, the re-order level and size, and the item's owner.

From that point, the application keeps track of the current number available and committed. Available inventory is the total number you have on hand, including any that have been ordered but haven't been processed yet. The application decrements this number whenever a fulfillment order containing that item is processed. Committed inventory is the number that have been ordered but not processed yet. The application increments this number when a fulfillment order containing that item is created, and decrements it when the order is processed.

When the available inventory drops below the re-order level, the application notifies the owner of that item that it's time to reorder, and tells them what the reorder size should be.

The Available and Committed inventory numbers let the application verify that a fulfillment order can actually be processed. When the agent requests a physical item and enters a quantity, the application ensures that there are enough items in the available inventory to accommodate the request.

If the quantity requested does exceed the available inventory, the application displays a message telling the agent that the item is out of stock. If the Date Available field is not blank, the application knows that the item has been re-ordered and the application displays a message telling the agent when the stock is expected to arrive.

If the agent leaves the out of stock item in the order, when they update it, the application repeats the message telling them the item is out of stock and gives them the option of automatically dropping it from the order. If they decline, the application leaves the out of stock item in the order.

In order to make use of this functionality, whenever an item is reordered the owner should update the stock library record with the quantity they ordered (in the No. Re-ordered field) and the date the item is expected to arrive (in the Date Available field).

When the stock actually arrives, the owner should:

1. Select the stock item record.
2. Right-click and select Stock Received from the popup menu.
3. Enter the number received in the dialog box
4. Click OK.

The application then increments the Available inventory by that amount and clears out any information in the No. Re-ordered and Date Available fields.

Creating packages

To create a package:

1. Go to the Fulfillment Admin form and select the New button in the Package group.
2. If there is a template pack associated with this package, select the pack in the Template Pack field. (For more information on template packs, see the *Business Application Tools User Guide*.
3. To add literature items to the package:
    a. If the item already exists, add it to the Item IFB in the Package group.
    b. If the item does not exist, select the New button in the Stock Library group, enter the item information, then select the Update button. Once the item has been added to the database, you can add it to the Item IFB in the Package group.

4. Once all items have been added, select the Update button to save the package information.
5. If you want to link a category with this package:
   a. Go to the Category form and select the Search button in the Category group. (For information about creating categories, see Categories on page 26.)
   b. Select the category you want to link the package with in the browser.
   c. Select the Change button, and enter the package in the Package field.
   d. Select the Update button to save the category and package association.

Working with actions and escalations

Actions are messages that HRQ sends automatically when an issue, task, or fulfillment record changes its status. If the status doesn't change, then no action message is ever sent.

Escalations, on the other hand, are messages HRQ sends out if a record does *not* change its status in a given time. For example, if a task record gets created and is assigned to a workgroup, you can set up an escalation rule that will send a message if that task is not accepted by an owner within a certain number of hours. Escalations are sent to the workgroup associated with a call, so you must create workgroups if you want to use escalation rules. (For details, see *IC Administration Volume 2: Agents, Customers, & Queues*.)

Actions and escalations require:

- that any agent receiving an action or escalation must have the Support role enabled in their agent profile record. For details, see *IC Administration Volume 2: Agents, Customers, & Queues*.
- that the Notification server be running. For more information, see *IC Administration Volume 1: Servers & Domains*.

Actions

Sometimes you want HRQ to send out an alert, email, fax, or page when an issue, task, or fulfillment order record changes its status. When such a change happens, HRQ checks to see if any Actions have been set up for that combination of record type and status setting. If it has, HRQ sends out the specified message to the list of recipients.

For example, when an issue’s status becomes "Assigned", you might want to send a message to the associated workgroup so that one of the members of that workgroup can accept and resolve the issue.

Note:

The statuses Assigned and Owned are slightly different. When a record is Assigned, it is sent to a workgroup until one of the members of that workgroup accepts responsibility for it. Once the record is associated with an individual person, its status becomes Owned. Therefore, a workgroup cannot "own" a record and a record cannot be "assigned" to an individual.

The following tables show the combination of record status, delivery method, and recipients that you can specify in an action rule.

Issue actions

Issue actions can be fired when the record status changes to one or more of the following:

1-New
2-Assigned
3-Owned
4-Closed
5-Cancelled
6-Pended

When such a change occurs, the action rule can send one or more of the following types of notification:

Alert
Email
Fax
Pager

These notifications can go to one or more of these people:

Agent
Workgroup
Owner
Manager
CC List

Note:

If you specify Workgroup, leave the Notification Type filed blank because the application uses the notification method specified on the workgroup record.

Example 1: Send a page to all members of a workgroup when an issue is assigned to it:

- Status: 2-Assigned
- Send: Pager

- Recipient: Workgroup

Example 2: Send an alert to an employee when they are given the responsibility for an issue:

- Status: 3-Owned
- Send: Alert
- Recipient: Owner

Task actions

Task actions can be fired when the record status changes to one or more of the following:

1-New
2-Assigned
3-Owned
4-Closed
5-Cancelled

When such a change occurs, the action rule can send one or more of the following types of notification:

Alert
Email
Fax
Pager

These notifications can go to one or more of these people:

Workgroup
Owner
Manager
CC List

Note:

If you specify Workgroup, leave the Notification Type filed blank because the application uses the notification method specified on the workgroup record.

Example 1: Send an email to the CC list when a task is completed:

- Status: 4-Closed
- Send: Email
- Recipient: CC List

Example 2: Send a fax to a manager when a task is cancelled:

- Status: 5-Cancelled
- Send: Fax
- Recipient: Manager

Fulfillment actions

Fulfillment actions can be fired when the record status changes to one or more of the following:

1-New
2-Assigned
3-Owned
4-Processed
5-Cancelled

When such a change occurs, the action rule can send one or more of the following types of notification:

Alert
Email
Fax
Page

These notifications can go to one or more of these people:

Agent
Owner
Workgroup

Note:
If you specify Workgroup, leave the Notification Type filed blank because the application uses the notification method specified on the workgroup record.

Example 1: Send a fax to an agent when the fulfillment request is processed:

- Status: 4-Processed
- Send: Fax
- Recipient: Agent

Example 2: Send an alert to a workgroup when a fulfillment request is assigned to it:

- Status: 2-Assigned
- Send: <leave this field blank>
- Recipient: Workgroup

Escalations

Escalations ensure that issues, tasks, and fulfillment orders don't fall through the cracks. They monitor how long a record is at a given status, and send a notification if the length of time exceeds the duration built into the escalation rule.

For example, if an issue is assigned to a workgroup but doesn't get an owner in the time specified, an escalation event is raised and a notification is sent to the specified workgroup. If the rule is set to repeat, HRQ waits for the same amount of time and sends another notification to the same people if the request has not changed status.

Alternatively, you schedule two escalation rules so that different workgroups get notified depending on how long it stays at a given status. For example, if it's Assigned to a workgroup but doesn't become Owned after 4 hours, you could have an escalation rule send a notification to tier 1 of that workgroup notifying them that the request is in the queue. If it's still Assigned after 8 hours, you might want to send a notification to tier 2 of the workgroup so a manager could decide whether the issue or task requires special handling.

To create escalations, use the Issue Action/Escalation, Task Action/Escalation, or Fulfillment Actions/Escalation form.

Issue and task escalations

Issue and task escalations can be fired when the record status does *not* reach one or more of the following in the given amount of time:

Assigned (from New)
Owned (from New or Assigned)
Closed (from Assigned or Owned)

These notifications can go to one or more of these workgroups:

Primary Workgroup
Escalation Workgroup

Example 1: Send an escalation to the primary workgroup if a high, critical, or special priority issue is not Owned after 4 hours:

- Type: Not Owned
- Priority: 3-High
- Delay: 4
- Delay units: Hours
- Tier: 1
- Subject: Issue record does not have an Owner after 4 hours.
- Notify Target: Primary Workgroup

Example 2: Send an escalation to the escalation workgroup if a critical or special priority task is not Closed after 30 minutes:

- Type: Not Closed
- Priority: 4-Critical
- Delay: 30

- Delay units: Minutes
- Tier: 1
- Subject: Critical task not closed after 30 minutes.
- Notify Target: Escalation Workgroup

Fulfillment escalations

Fulfillment escalations can be fired when the record status does *not* reach one or more of the following in the given amount of time:

Assigned (from New)
Owned (from New or Assigned)
Processed (from Assigned or Owned)

These notifications can go to one or more of these workgroups:

Primary Workgroup
Escalation Workgroup

Example 1: Send an escalation to the primary workgroup if any fulfillment order is not Processed after 2 work days:

- Type: Not Processed
- Priority: 1-Low
- Delay: 16
- Delay units: Hours
- Tier: 1
- Subject: Fulfillment order not processed after 2 days.
- Notify Target: Primary Workgroup

Testing your participant and benefits integration

HRQ includes a focus called HRQ Data Entry so you can enter temporary participant and benefit information for testing purposes. There are three tabs in this focus, Benefits, Dependents, and Organization.

Once you enter data on these tabs, you can access it using the HRQ Agent focus. This lets you simulate up a "live" database and start testing your actions, escalations, issue, and task templates.

After you have successfully configured your system using the test data, you can map your real participant and benefits databases to the appropriate HRQ tables and automatically replace your test data with live data.

Chapter 4: Business logic flows and state diagrams

When agents do things like create a new record, ship a fulfillment package, or run a script, HRQ performs a lot of processing behind the scenes to make sure the proper notifications get sent out, inventories are properly adjusted, and script results are properly stored.

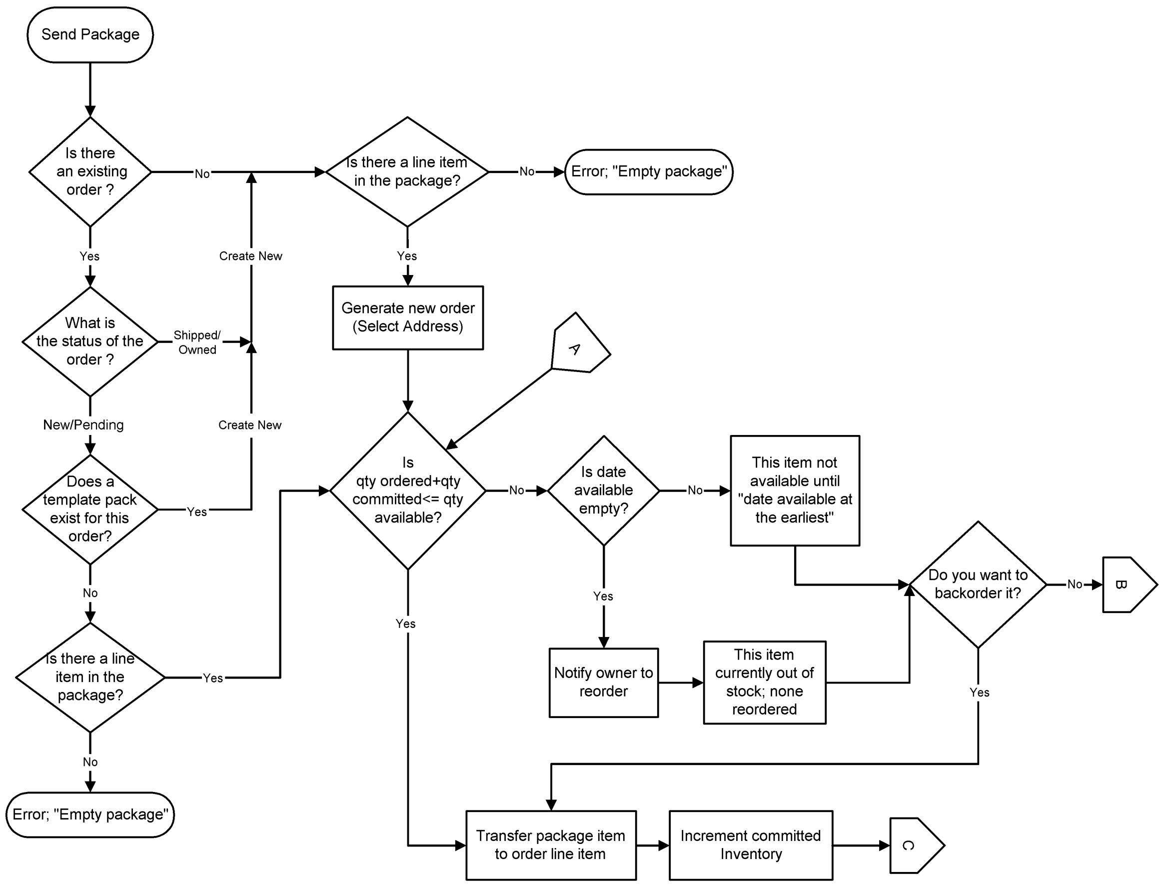
This section contains the following topics:

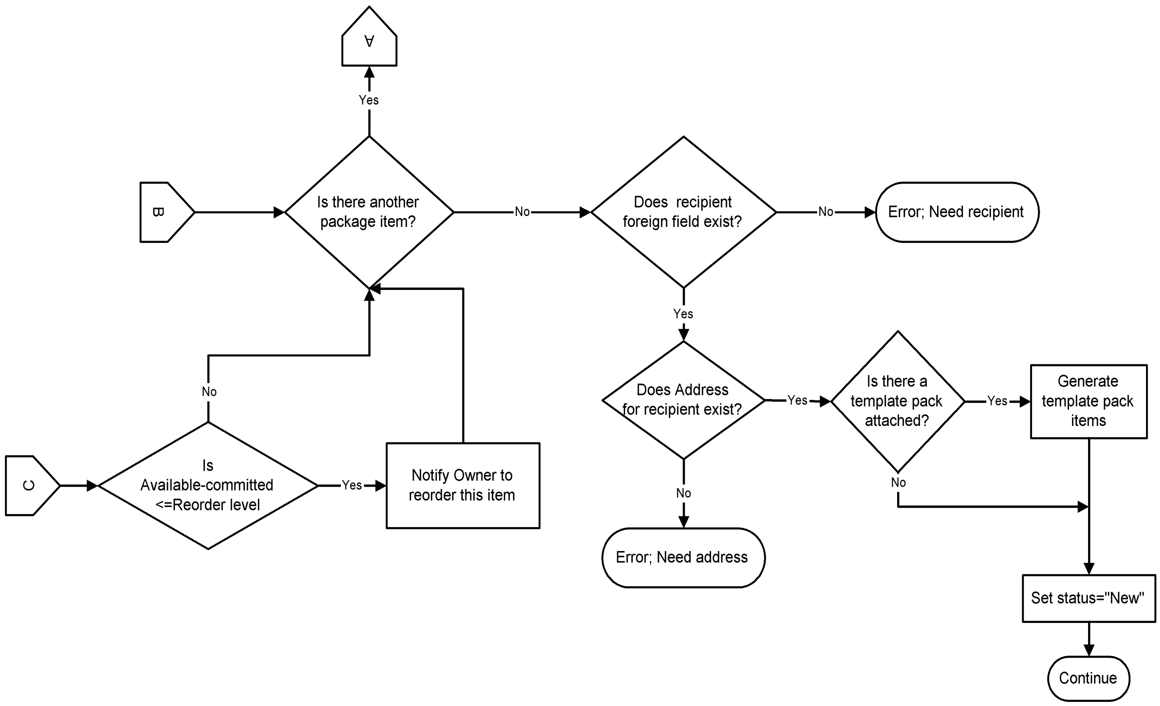
Note:

The business logic presented here is based on the default behavior of HRQ only. You should check with your system administrator to make sure they did not change the IC Scripts that drive these processes.

Business logic flow for fulfillment

When the agent clicks Send Package, HRQ goes through the following business logic to make sure all items are available and to send a message if shipping this package will bring any item below its re-order level.





State diagrams

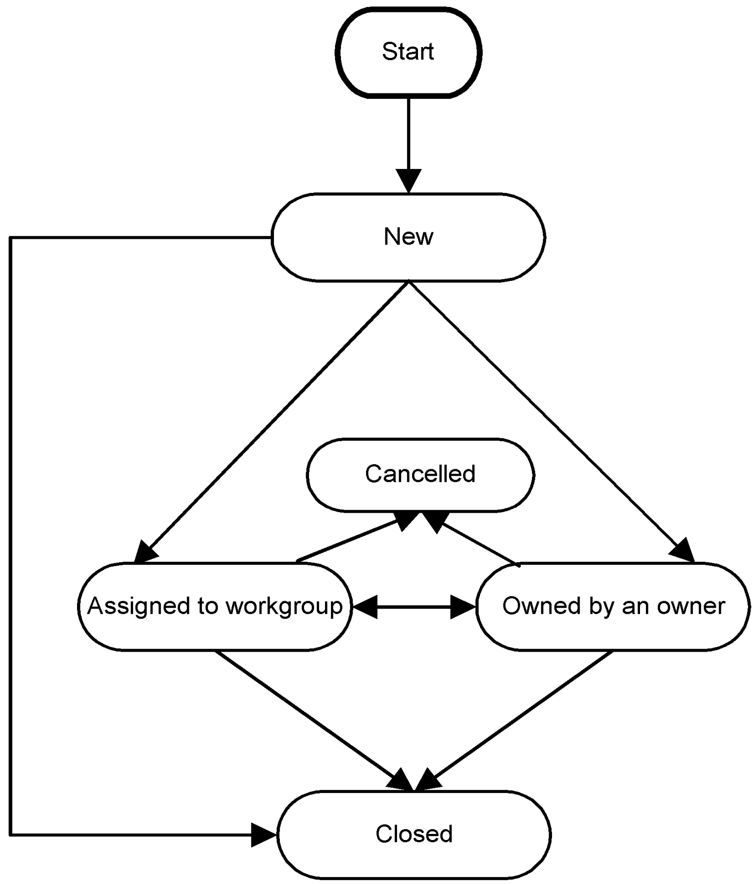
These diagrams show the lifecycle of:

- Issues and tasks
- Fulfillment orders.

Issues and tasks

This diagram shows the states an issue or task record can be in as it moves from New to Cancelled or Closed.

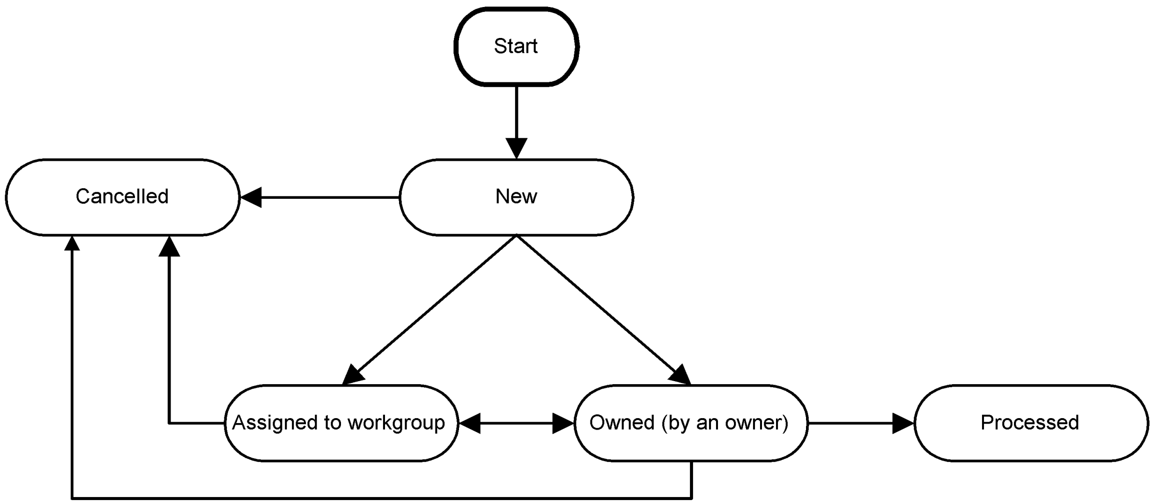
Issue and Task State Diagram



Fulfillment orders

This diagram shows the states a fulfillment order record can be in as it moves from New to Cancelled or Processed.

Fulfillment Order State Diagram



Chapter 5: Agent task flow

Sometimes it is easier to design your system when you know how it's going to be used. This chapter provides the basic agent call-taking process so that you can see how your agents are going to be dealing with the HRQ environment that you have created.

This section shows the flow for tasks based on the default HRQ GUI only. You should check with your system administrator to make sure that they did not change the organizational structure of the GUI that drives these task flows.

When an agent takes a call, the agent should:

1. Find out whether the caller is asking about a current plan participant.

Yes	No
If the caller is asking about a current participant: 1. Search for the participant's name in the Participant group. 2. If HRQ finds a record that matches the desired participant, select it from the browser. If not, HRQ will create a participant record for you. 3. If HRQ found a matching Caller record, it will backfill that information into the Caller group. If the information is backfilled, verify that it is correct and make any updates that are required. If HRQ did not backfill a caller record, select the New button in the Caller group, enter the caller's information, then select the Update button.	If the caller is not asking about a current participant: 1. Search for the caller's name in the Caller group. 2. If HRQ displays the caller's name in the browser, click on it. Otherwise, select the New button in the Caller group and enter the caller's information.

2. Find out what the caller wants to know.
3. Look at the Issue IFB in the Participant group to see if this caller has asked about this issue before. If the issue is listed there, double-click the selection button at the beginning of the issue's row to see the details about that issue. Make sure you give the caller the same information that was given before.
4. If the caller is requesting literature, see Creating a fulfillment order on page 46.

5. Search for, and select, an appropriate category in the Category group.
6. Look at the FAQs associated with that category. If any of them look like the caller's problem, double-click the selection button at the beginning of the FAQ's row to use the associate Issue Template. If none of the FAQs are applicable, select the New button in the issue group to create a new issue.
7. Enter the appropriate information in the Issue group.

   Tip:

   If the caller is asking a question about standard benefits, use the other forms in the focus to view the participant's benefit information.
8. Select the Update button to add the issue to the database. If you selected an Issue Template and that template has associated Task Templates, create those tasks by answering Yes at the prompt after you update the issue.
9. If there are any tasks that need to be completed in order to close this issue, go to the Task form and enter them, or make sure that any automatically-generated tasks are appropriate and complete.
10. Find out if the caller has any other issues. If they do, return to step 2.

Creating a fulfillment order

To create a fulfillment order:

1. Go to the Fulfillment form.
2. If the information is not already available, get the caller's shipping, fax, or email address, as appropriate.
3. Search for any preset packages that meet the caller's requirements. If you find any, select them and then select the Send Package button.
4. Repeat step 3 for all preset packages that the caller is interested in.
5. If there is a non-package item that the caller wants:
   a. Start a new line in the Line Item IFB.
   b. Select the Search icon in the Item Name field to search for the item.
   c. Select the desired item from the pop-up browser.
6. Repeat step 5 for each non-package item that the caller is interested in.
7. If the caller wants more than one copy of anything, change the quantity for those items in the Line Item IFB.
8. Select the Process Order button to send the selected items to the caller.

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