

# Aspect<sup>®</sup> Professional Services Technology Primers

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Business Innovations • Unified Analytics



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# Aspect® Professional Services: Aspect® Performance Management Technology Primers

## Enhancing the Value of Aspect Performance Management

Aspect Performance Management provides value and functionality right "out-of-the-box", in order to maximize your investment. However, many customers would like to fully realize the potential in some of the features within the product. Below are technology primers designed to take your Aspect Performance Management implementation to the next level and provide the skills needed to be self-sufficient.

### Aspect Performance Management - Alerts and Targets

#### Target Management

Aspect Performance Management contains a wizard which allows entry of targets for individuals against selected key performance indicators (KPIs). This wizard is easy-to-use, but may not meet all your business requirements. It may be necessary to enter targets multiple times for different individuals, dimensions, and KPIs. By basing targets on dynamic calculations, targets can be propagated throughout the platform eliminating manual duplication. Given the importance of targets to proactively and efficiently manage your business, it's important to learn these methodologies and best practices.

This portion of the Technology Primer will educate the attendee on the following topics:

1. Targets and their importance in Aspect Performance Management for effective management of your resources
2. Best practices for using the current Target Entry wizard, and how to enable the wizard
3. Limiting users who have ability to enter targets, ensuring consistency and accuracy
4. Advanced targeting including derived targets to enhance the performance of your Aspect Performance Management system

#### Alerting

One of the most powerful features of Aspect Performance Management is the ability to set an alert to notify you of certain conditions. For example, you can receive a text message or email if overall service level exceeds a pre-defined threshold. Aspect Performance Management contains an out-of-the-box wizard (Alert Designer) to allow you to create your own Alerts.

This portion of the Technology Primer will educate the attendee on the following topics:

1. Alerts and their importance in Aspect® Performance Management
2. Best practices for using the "Alert Designer" to create customized alerts based on your business model
3. The power of subscriptions for alerts for advanced functionality and nearly limitless Alerting capabilities

Core Primer Duration: 3 Days

Post Primer Support: 1 Day

#### Technology Primers

Alerts and Targets

Workflows and Processes

Advanced Coaching

Advanced ETL / Reporting Services

Quality Management API

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## Aspect® Performance Management – Workflows and Processes

### Workflows

Similar to alerts, workflows are a powerful and flexible tool that allow for automation of some of the most common, and even the most complex tasks. Once a process is identified that could be automated, the ability to design and develop workflows is critical to building a best in class Aspect Performance Management system.

The purpose of this portion of the Technology Primer will educate the attendee on the following topics:

1. Workflows and how/when to use them
2. How to use eForms with workflows
3. Using alerts with workflows
4. Best practices for identifying, designing and developing custom workflows to enhance your Aspect Performance Management system

Core Primer Duration: 5 Days

Post Primer Support: 2 Days

### Aspect Performance Management - Advanced Coaching

Coaching is a powerful workflow application in Aspect Performance Management. Coaching gives you the ability to tie a user's performance to the key metrics that drive the business. To realize the full benefit of coaching, it's necessary to configure the module to meet a company's requirements. A robust set administration tools are available for this process allowing for multiple coaching processes to reside in your application. A key component of the coaching application is behind the scenes; a robust set of rules and models which are run at user-defined schedules. These models monitor data and initiate coaching sessions and also recommend the type of coaching that is relevant for your user.

The purpose of this portion of the Technology Primer will educate the attendee on the following topics:

1. Best practices for coaching and the setup of coaching forms, including multiple modules within the same application
2. Creating goals to effectively monitor activities
3. Setup of rules and models and how to schedule your custom applications
4. Incorporate goals into your processes, tying them into rules

Core Primer Duration: 2 Days

Post Primer Support: 1 Day

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## Aspect® Performance Management - Advanced ETL and Reporting Services

By incorporating key metrics and KPIs from new sources, as well as developing reporting services reports, you will continue to increase both the adoption and the value on your Aspect Performance Management implementation. Aspect experts provide valuable knowledge transfer sessions and best practice consulting on several key areas of the ETL (extract, transform and load) data process.

The purpose of this Technology Primer is to educate the attendee on the following topics:

1. Best practices using SQL Server Integration Services (SSIS) for the ETL process to incorporate new data into your implementation.
2. Understanding the Cube process and how the data flows from your new source to Analysis Services and finally to your Reports.
3. Develop Reporting Services reports to further transform you data into meaningful information with added functionality, formatting and accessibility.

Core Primer Duration: 10 Days

Post Primer Support: 5 Days

## Aspect® Quality Management API

Aspect Quality Management is an indispensable contact center tool that is used to capture voice and window interactions, based on customizable business rules, which are ultimately used for quality and training purposes. This powerful tool also exposes a web service API which allows application developers to interface third-party applications to Aspect Quality Management.

The Aspect Quality Management API allows control for starting, stopping, pausing and resuming interaction recordings. It also provides a method to associate interaction specific information (such as a Call ID and/or other agent or customer identifiers) as key value pairs in order to better identify or score the recording.

The purpose of this Technology Primer is to educate the attendee on the following topics:

1. All methods presented by the Aspect Quality Management Web Service API
2. Best practices when using the Aspect Quality Management API

As part of this interactive engagement, attendees will create a sample project (in C# .NET) to illustrate the major features of the Aspect Quality Management API.

Core Primer Duration: 2 Days

Post Primer Support: 1 Day

# Aspect® Professional Services: Aspect® Workforce Management Technology Primers

## Enhancing the Value of Aspect Workforce Management

Aspect Workforce Management is the premier workforce management product within contact centers worldwide. While having extensive intraday and historical reporting capabilities built in, many customers may require additional data integrations to source their business intelligence or third party back-end systems (CRM, HR, and Payroll). To assist customers in developing their own data integrations using the rich set of workforce management data, Aspect has developed the following technology primers for Aspect Workforce Management.

### Aspect Workforce Management SDK - Public Data Model

#### Public Data Model

Aspect Workforce Management provides an extensive set up of historical database tables. Ranging from agent productivity and intraday performance to actual scheduled segments, customers can extract detailed information via standard queries, reports or ETL (extract, transform and load) applications. Apart from the actual schema, learning the data concepts within Aspect Workforce Management empower customers to quickly develop their own data integrations.

The purpose of this Technology Primer is to educate the attendee on the following topics:

1. Understand Aspect Workforce Management data concepts and how the flows from the application to the underlying tables
2. Navigate the table relationships within the database schema, in order to provide meaningful data output
3. Type of data found within the RDBMS (Relational Database Management System) of Aspect Workforce Management, along with data that can only be extracted through existing reports or Aspect Workforce Management web services
4. Best practices for custom report modifications within Aspect Workforce Management
5. Crystal-based reports Common customer data requests along with any performance considerations

Core Primer Duration: 2 Days

Post Primer Support: 1 Day

#### Workforce Management

Public data model

Web services

Full SDK

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## Aspect® Workforce Management SDK – Web Services

### Web Services

Aspect Workforce Management web services exposes a rich set of functions to Customers, allowing them to gather data in a structured and supported standard. A wide range of functions exist, from agent productivity, administrative, forecasting, official schedules and many more. Given that certain metrics are only obtainable during run-time and not within the database (adherence, compliance, certain intraday performance statistics and others, Aspect Workforce Management allows you access to these and other metrics.

The purpose of this Technology Primer is to educate the attendee on the following topics:

1. Overview of the Aspect Workforce Management data model
2. Review of the Aspect Workforce Management web services available and their functionality
3. How to configure your environment to utilize Aspect Workforce Management web services
4. Understand the syntax and procedure of calling the required functions as well as managing the XML result set
5. Discuss the different parameters and options within the Aspect Workforce Management web services and their meaning
6. Understand the types of data only found through web services and value offered by these metric

Core Primer Duration: 2 Days

Post Primer Support: 1 Day

## Aspect Workforce Management SDK – Full SDK

### Full SDK

Aspect Workforce Management SDK encompasses several different areas. Included are not only the data model and web services mentioned above, but additional developer tools and documentation. The SDK provides a developers guide, API code, sample applications and other information to assist developers in their integration projects. Ranging from notification server, tally server and updater, the SDK is a comprehensive set of tools designed to enrich the customers Aspect Workforce Management environment.

The purpose of this Technology Primer is to educate the attendee on the following topics:

#### Data Model

1. All topics covered within the Aspect Workforce Management data model technology primer

#### Web Services

1. All topics covered within the Aspect Workforce Management web services technology primer

#### API

1. Discuss specific customer needs in utilizing certain APIs for their integration project
2. Best practices in coding using the Aspect Workforce Management APIs
3. Review areas of the Aspect Workforce Management SDK developers guide and focus on the topics of interest for the customer

Core Primer Duration: 3 Days

Post Primer Support: 2 Days

# Aspect® Professional Services: Unified Analytics Technology Primers

## Enhancing the Value of Aspect® Unified IP® and other Aspect Integrations

Aspect provides technology primers for a wide array of products. Services range from blended environment unified communications platforms such as Aspect Unified IP, Aspect Unified IP - Advanced List Management, and Aspect® Enterprise Campaign Manager™ to performance and business intelligence systems as such Unified Command and Control® Reporting and Aspect® Quality Management. Below are additional technology primers available through Aspect® Professional Services.

### Aspect Unified IP and Aspect Unified IP - Advanced List Management Analytics Workshop

#### Data Models

Aspect Unified IP and Aspect Unified IP - Advanced List Management provide a tremendous combination for inbound and outbound contact centers. Storing historical data for agent, contact, campaign along with many more customer touch points and key business indicators. Harnessing the full value of this information is critical to providing world-class business intelligence and reporting environment as well as provides a foundation of data integration into existing customer data warehouses.

The purpose of this Technology Primer is to educate the attendee on the following topics:

1. Review of the Aspect Unified IP data views / reports available and their functionality
2. In depth understanding the Aspect Unified IP and Aspect Unified IP - Advanced List Management data models as well as the key table relationships
3. Aspect Unified IP - Advanced List Management historical reports
4. Real-time reporting for both Aspect Unified IP and Aspect Unified IP - Advanced List Management and the capabilities for each system
5. Best practices in developing data extractions / reports for Aspect Unified IP and Aspect Unified IP - Advanced List Management

Core Primer Duration: 2 Days

Post Primer Support: 1 Day

## Additional Information

To learn more about these offerings contact your Aspect account team today.

### Technology Primers

Aspect Unified IP / Aspect Unified IP Advanced List Management Analytics Workshop