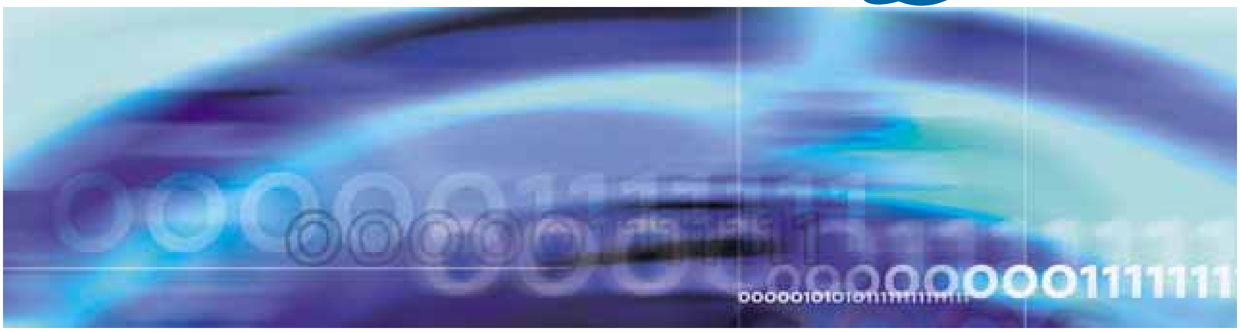

Nortel Workforce Management

Coaching Addendum

NN44480-118

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Contents

New in this release

The following sections detail what's new in *Nortel Workforce Management Coaching Addendum Guide* (NN44480-118) for Release 7.0.

- "Features" (page 5)
- "Other changes" (page 6)

Features

This Coaching release enhances the Nortel Workforce Management packages to provide features that enable better management of key monitoring interactions, whether between a supervisor and agent, a senior agent and another agent, or conceivably an experienced agent to a new manager, in particular for managing, documenting, and tracking coaching interactions to:

- Ensure that employees are coached, such as for Human-Resource actions
- Eliminate manual recording keeping
- Improve collaboration among coaching contributors

These features allow administrators, supervisors, managers, and schedulers, depending on their privileges, to perform such tasks as:

- assigning a coaching task for a supervising employee to coach another employee
- attaching Nortel Workforce Management artifacts (such as KPIs, evaluations, or lessons) as well as external documents
- configuring alerts about the need for coaching
- scheduling coaching sessions

Other changes

This addendum addresses each of the areas in the Workforce Management product that was enhanced or added to provide coaching support, specifically:

- In the **My Home** module, a new section, **My Coaching**, has been added. This section can be used by any employee involved in coaching, whether as a trainee or a coach. See "My Coaching" (page 9).
- A new **Coaching** module has been added, containing one section, **Manage Coaching**. This section is used primarily by administrators, managers, and supervisors to manage coaching sessions. See "Manage Coaching" (page 19).
- In the **App Admin** module, a new section, **Coaching**, has been added. It contains two tabs: **Coaching Session Types** and **Coaching Results**. These tabs are primarily used by managers, supervisors, and administrators. See "Coaching Administration" (page 33).
- On the **Organization** tab of the **Alert Rules** section of the Tracking module, several new alerts have been added:
  - — **Coaching Session Alert**
  - — **Coaching Session Due Date Reminder**
  - — **Coaching Session Reminder**

  See "Coaching Alert Rules" (page 39).
- Forecasting and Scheduling has been enhanced to allow scheduling coaching sessions.
- New privileges were added for the administration and management of Coaching functions. These privileges are described in the *Nortel Workforce Management Roles and Privileges Guide* (NN44480-601).

Introduction

This document contains information about the management of key mentoring interactions, whether between a supervisor and agent, a senior agent and another agent, or conceivably an experienced agent to a new manager, in particular for managing, documenting, and tracking coaching interactions. The document contains the following chapters:

Customer support

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

Finding the latest updates on the Nortel Web site

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

Getting help from the Nortel Web site

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

www.nortel.com

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

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

- open and manage technical support cases

Getting help over the phone from a Nortel Solutions Center

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

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

www.nortel.com/callus

Getting help from a specialist by using an Express Routing Code

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

www.nortel.com/erc

Getting help through a Nortel distributor or reseller

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

My Coaching

The **My Coaching** section is located in the **My Home** module, and can be used by any employee involved in coaching, whether as a trainee or as a coach. The initial page lists, for agents, all sessions assigned to them. For supervisors and managers, it lists sessions for which they are also the assigned coach.

The sessions are listed in a tabular format, consisting of the following columns:

Column	Description
Alert Icon	An icon to alert that a coaching session is awaiting user response
Trainee	The full name of the employee who is the trainee in the coaching session.
Coach	The full name of the employee who is the coach in the coaching session.
Scheduled Date	The date on which the coaching session is scheduled to take place.
Due Date	The date on which the coaching session is due.
Completion Date	The date on which the coaching session was completed.
Assigned By	The full name of the employee who, or notification rule that, created the coaching session.
Session Type	The name of the session type that is assigned to the coaching session.
Result	The name of the result that is assigned to the coaching session.
Status	The status of the coaching session.

Additional controls at the top right side of the page consist of:

- **Customize**: Allows you to customize the columns displayed on the page.
- **Filter By Status**: Allows you to filter the list by session status.
- **Date Range**: Allows you to filter the list for a specific date range.

Note: Sessions that are waiting for user response are shown, regardless of the filter's configuration.

Customizing the Columns Displayed for Sessions

To customize the columns displayed on the page:

Step	Action
1	Select **Edit** from the drop-down menu. The **List Configuration** page opens.

—End—

To customize the columns displayed:

Step	Action
1	In the **Customize** field at the top right of the page, select **Edit**. The **List Configuration** page opens.
2	Select the desired configuration to edit using the drop-down list.
3	Move the desired properties from the left pane to the right pane using the arrows in the middle.
4	Click **Save** if you are editing an existing configuration setting, or click **Save As** to save a new configuration using a new name.
5	Click **Done** to exit this window without saving.

—End—

Filtering Sessions by Status

To filter by status, select a specific status in the **Status** field, or **All** to view all statuses.

Filtering Sessions by Date Range

Use this component to view sessions within a specific date range. The date range applies to the three date columns. Sessions that have a date that falls inside the range are displayed.

In the **Date Range** field, click the **Date** button to specify start and end dates.

Viewing Coaching Sessions

This option is available to the session's trainee.

To view a coaching session:

Step	Action
1	Select the coaching session that you want to view.
2	Click **View**. A properties page for the selected session is displayed. It consists of the following containers: • **Properties** • **Schedule Details** • **Attachments** • **Meeting Summary** • **Trainee Feedback** • **Review and Approval**

—End—

Properties

This container defines the general properties of a coaching session, and displays the following items:

Item	Description
Trainee	The full name of the employee who is the trainee in the coaching session.
Organization Name	The name of the organization to which the coaching session belongs.
Creation Date	The date on which the coaching session was created.
Assigned By	The full name of the employee who, or notification rule that, created the coaching session.
Reason	The reason for having the coaching session.
Coaching Session Type	The name of the session type that is assigned to the coaching session.
Coach	The full name of the employee who is the coach in the coaching session.

Item	Description
Status	The current status of the coaching session.
Due Date	The date on which the coaching session is due.
Follow-up Date	The date on which to follow up on the coaching session. Choices are to define an absolute date or a relative number of days after the coaching session is due.
Result	The name of the result that is assigned to the coaching session.
Completion Date	The date on which the coaching session was completed.

Schedule Details

This container defines the scheduling details, and displays the following items:

Item	Description
Date and Time	The date and time on which the coaching session is available or scheduled to take place.
Duration	The duration of the coaching session.
Location	The location at which the coaching session is to take place.

Attachments

This container defines the related content that is attached to the coaching session, and displays the following items:

Item	Description
Name	The name of the attachment.
Type	The type of attachment.
Details	The details of the attachment.
Comment	A free text field you can use to add a comment about the attached content.
	Click this icon to open a new window to view the attachment content. Refer to the table in "Viewing Attachments" (page 29) for information on viewing attachments.
	Click this icon to view the attachments in the list, each in a new window.

Meeting Summary

This container allows you to summarize the coaching session meeting, and displays the following item:

Item	Description
Meeting Summary	The summary of the coaching session meeting.

Trainee Feedback

This container displays the feedback of the trainee to the coaching session meeting, and displays the following item:

Item	Description
Trainee Feedback	The feedback of the trainee to the coaching session meeting.

Review and Approval

This container displays the review and approval comments for the coaching session meeting. It is visible only when a coaching session has been completed, and displays the following item:

Item	Description
Reviewed/Approved By	A list of the employees who have reviewed and approved the coaching session, along with the user comments.

Editing Coaching Sessions

This option is available to the session's coach.

To edit a coaching session:

Step	Action
1	Select the coaching session that you want to edit.
2	Click **Edit**. A properties page for the selected session is displayed. It consists of the following containers: • **Properties** • **Schedule Details** • **Attachments** • **Meeting Summary** • **Trainee Feedback**

- **Review & Approval**

The availability of some fields depend on the current status of the session.

—End—

Properties

This container defines the general properties of a coaching session, and displays the following items:

Item	Description
Trainee	The full name of the employee who is the trainee in the coaching session.
Organization Name	The name of the organization to which the coaching session belongs.
Creation Date	The date on which the coaching session was created.
Assigned By	The full name of the employee who, or notification rule that, created the coaching session.
Reason	The reason for having the coaching session.
Coaching Session Type	The name of the session type that is assigned to the coaching session. If applicable, select a session type from the list.
Coach	The full name of the employee who is the coach in the coaching session. If applicable, click the **Employee** button to select a different employee.
Status	The current status of the coaching session.
Due Date	The date on which the coaching session is due. Click the **Calendar** button to select a date.
Follow-up Date	The date on which to follow up on the coaching session. Choices are to define an absolute date or a relative number of days after the coaching session is due. If applicable, click the **Calendar** button to select a date or select a value from the list.
Result	The name of the result that is assigned to the coaching session. If applicable, select a result from the list.
Completion Date	The date on which the coaching session was completed.

Schedule Details

This container defines the scheduling details, and displays the following items:

Item	Description
Date and Time	The date and time on which the coaching session is available or scheduled to take place. If applicable, click the **Date and Time** button to select a date.
Duration (in minutes)	The duration of the coaching session. If applicable, enter the duration or use the pre-defined interval arrows.
Location	The location at which the coaching session is to take place. If applicable, enter the location.
Schedule in WFM	If selected, the session is scheduled with Nortel Workforce Management's Forecasting and Scheduling. The options for scheduling are: • **Optimize Date/Time** – A request is sent to the scheduling engine to select the best date and time for the coaching meeting. The user-specified date/time is used as the start date/time of availability for scheduling this meeting; the due date is used as the end date/time of availability. Only the trainee will have a coaching meeting placed on his schedule. • **Specific Date/Time** – Forecasting and Scheduling will attempt to schedule the meeting at the date/time specified. If the requested time slot is already taken by another activity, a warning is displayed. Both the coach and the trainee will have a coaching meeting placed on their schedules (provided that both are being scheduled within Forecasting and Scheduling). Once a coaching meeting has been associated with an activity in Nortel Workforce Management, the scheduling fields can no longer be edited. The date shown is taken from the Forecasting and Scheduling schedule. Changes to the schedule details should be done with Forecasting and Scheduling.

Attachments

This container defines the related content that is attached to the coaching session, and displays the following items:

Item	Description
Name	The name of the attachment.
Type	The type of attachment.
Details	The details of the attachment.
Comment	A free text field you can use to add a comment about the attached content.
	Click this icon to open a new window to view the attachment content.
	Click this icon (if applicable) to delete the attachment.
Add	If applicable, click to add a new attachment.
	Click this icon to view the attachments in the list, each in a new window.

Note: Changes are permanently saved only when the coaching session is saved.

Meeting Summary

This container allows you to summarize the coaching session meeting, and displays the following item:

Item	Description
Meeting Summary	The summary of the coaching session meeting.

You need to fill out this container after a coaching session has taken place.

Trainee Feedback

This container displays the feedback of the trainee to the coaching session meeting, and displays the following item:

Item	Description
Trainee Feedback	The feedback of the trainee to the coaching session meeting.

Review and Approval

This container displays the review and approval comments for the coaching session meeting. It is visible only when a coaching session has been completed, and displays the following item:

Item	Description
Reviewed/Approved By	A list of the employees who have reviewed and approved the coaching session, along with the user comments.

Providing Feedback for Coaching Sessions

This option is available to the session's trainee, for sessions that have the status of **Await Trainee Feedback**.

To provide feedback:

Step	Action
1	Select the coaching session for which you want to provide feedback.
2	Click **Provide Feedback**.

—End—

Manage Coaching

The **Manage Coaching** section displays a list of coaching sessions, and allows you to create, edit, or delete a coaching session. A session is associated with an organization. When you select an organization in the left pane, the list of the existing sessions is displayed in the right pane.

The sessions are listed in a tabular format, consisting of the following columns:

Column	Description
Alert Icon	An icon to alert that a coaching session is awaiting user response
Trainee	The full name of the employee who is the trainee in the coaching session.
Coach	The full name of the employee who is the coach in the coaching session.
Scheduled Date	The date on which the coaching session is scheduled to take place.
Due Date	The date on which the coaching session is due.
Completion Date	The date on which the coaching session was completed.
Assigned By	The full name of the employee who, or notification rule that, created the coaching session.
Session Type	The name of the session type that is assigned to the coaching session.
Result	The name of the result that is assigned to the coaching session.
Status	The status of the coaching session.

Additional controls at the top right side of the page consist of:

- **Customize**: Allows you to customize the columns displayed on the page.
- **Filter By Status**: Allows you to filter the list by session status.
- **Date Range**: Allows you to filter the list for a specific date range.

Note: Sessions that are waiting for user response are shown, regardless of the filter's configuration.

Customizing the Columns Displayed for Sessions

To customize the columns displayed on the page:

Step	Action
1	Select **Edit** from the drop-down menu. The **List Configuration** page opens.

—End—

To customize the columns displayed:

Step	Action
1	In the **Customize** field at the top right of the page, select **Edit**. The **List Configuration** page opens.
2	Select the desired configuration to edit using the drop-down list.
3	Move the desired properties from the left pane to the right pane using the arrows in the middle.
4	Click **Save** if you are editing an existing configuration setting, or click **Save As** to save a new configuration using a new name.
5	Click **Done** to exit this window without saving.

—End—

Filtering Sessions by Status

To filter by status, select a specific status in the **Status** field, or **All** to view all statuses.

Filtering Sessions by Date Range

Use this component to view sessions within a specific date range. The date range applies to the three date columns. Sessions that have a date that falls inside the range are displayed.

In the **Date Range** field, click the **Date** button to specify start and end dates.

Editing or Creating Coaching Sessions

To edit or create a coaching session:

Step	Action
1	Select the coaching session that you want to edit and click **Edit**, Or Click **Create** to create a new coaching session. A properties page for the session is displayed. It consists of the following containers: • **Properties** • **Schedule Details** • **Attachments** • **Meeting Summary** • **Trainee Feedback** • **Review & Approval** ***Note:*** The availability of some fields depend on the current status of the session.

—End—

Properties

This container defines the general properties of a coaching session, and displays the following items:

Item	Description
Trainee	The full name of the employee who is the trainee in the coaching session.
Organization Name	The name of the organization to which the coaching session belongs.
Creation Date	The date on which the coaching session was created.
Assigned By	The full name of the employee who, or notification rule that, created the coaching session.
Reason	The reason for having the coaching session.
Coaching Session Type	The name of the session type that is assigned to the coaching session. If applicable, select a session type from the list.

Item	Description
Coach	The full name of the employee who is the coach in the coaching session. If applicable, click the **Employee** button to select a different employee.
Status	The current status of the coaching session.
Due Date	The date on which the coaching session is due. Click the **Calendar** button to select a date.
Follow-up Date	The date on which to follow up on the coaching session. Choices are to define an absolute date or a relative number of days after the coaching session is due. If applicable, click the **Calendar** button to select a date or select a value from the list.
Result	The name of the result that is assigned to the coaching session. If applicable, select a result from the list.
Completion Date	The date on which the coaching session was completed.

Schedule Details

This container defines the scheduling details, and displays the following items:

Item	Description
Date and Time	The date and time on which the coaching session is available or scheduled to take place. If applicable, click the **Date and Time** button to select a date.
Duration (in minutes)	The duration of the coaching session. If applicable, enter the duration or use the pre-defined interval arrows.
Location	The location at which the coaching session is to take place. If applicable, enter the location.
Schedule in WFM	If selected, the session is scheduled with Nortel Workforce Management's Forecasting and Scheduling. The options for scheduling are: • **Optimize Date/Time** – A request is sent to the scheduling engine to select the best date and time for the coaching meeting. The user-specified date/time is used as the start date/time of availability for scheduling this meeting; the due

Item	Description
	date is used as the end date/time of availability. Only the trainee will have a coaching meeting placed on his schedule. • **Specific Date/Time** – Forecasting and Scheduling will attempt to schedule the meeting at the date/time specified. If the requested time slot is already taken by another activity, a warning is displayed. Both the coach and the trainee will have a coaching meeting placed on their schedules (provided that both are being scheduled within Forecasting and Scheduling). Once a coaching meeting has been associated with an activity in Nortel Workforce Management, the scheduling fields can no longer be edited. The date shown is taken from the Forecasting and Scheduling schedule. Changes to the schedule details should be done with Forecasting and Scheduling.

Attachments

This container defines the related content that is attached to the coaching session, and displays the following items:

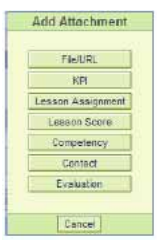
Item	Description
Name	The name of the attachment.
Type	The type of attachment.
Details	The details of the attachment.
Comment	A free text field, up to a maximum of 200 characters, that you can use to add a comment about the attached content.
	Click this icon to open a new window to view the attachment content.
	Click this icon (if applicable) to delete the attachment.
Add	If applicable, click to add a new attachment.
	Click this icon to view the attachments in the list, each in a new window.

> ***Note:*** Changes are permanently saved only when the coaching session is saved.

Adding Attachments Click **Add** in this container to add attachments to sessions. A pop-up menu is displayed that allows you to add specific types of attachments:

Attachment Type	Description
File	Any file.
URL	An address to a web site.
KPI	A snapshot of the value of a KPI from Scorecards, for the selected date. If the KPI is a future KPI, the value is taken online, once the KPI becomes operational.
Lesson Assignment	Assign a lesson to the trainee. The status of the assignment is checked online.
Lesson Score	A snapshot of the score of a lesson, at the time of attachment.
Competency	A snapshot of the value of a competency, at the time of attachment.
Contact	A snapshot of a contact from Nortel Quality Monitoring.
Evaluation	A snapshot of an evaluation Nortel Quality Monitoring.

The pop-up menu is shown below:



Selecting one of the attachment types opens a pop-up window that allows you to specify the required attachment information, as described below:

Adding File or URL Attachments The fields displayed on this page include:

Field	Description
Name	(Required) The name of the attachment.
Location	(Required) Choices are **File** or **URL**. For a file attachment, click the browse button and select the file to attach. For a URL attachment, enter the address of the web site.
Comment	A free text field, up to a maximum of 200 characters, that you can use to add a comment about the attachment.
Hidden from Trainee	Check the box if the attachment should not be visible from the trainee page.

Click **Attach**, to attach the selected content to the coaching session.

Click **View** to open a new window showing the attachment content. This option is not available for file attachments.

Click **Cancel** to close the window and return to the coaching session form page.

Adding KPI Attachments The fields displayed on this page include:

Field	Description
Name	(Required) The name of the KPI. Check the box of each KPI to be attached.

Click **Apply**, to attach the selected KPI(s) to the coaching session.

Click **View**, to open a new window to Scorecards, showing the details of the selected date range. This option is available only to users to whom the administrator has assigned privileges for viewing assigned KPIs.

Click **Cancel** to close the window and return to the coaching session form page.

Adding Lesson Assignment Attachments This page allows you to assign lessons via eLearning and attach them to a coaching session. The fields displayed on this page include:

Field	Description
Name	(Required) The name of the attachment.
Employee Name	The full name of the employee to whom the attached lessons are to be assigned.
Selected Lessons	(Required) Click the **Selected Lessons** button to open a dialog with the available lessons for assignment.
Comment	A free text field, up to a maximum of 200 characters, that you can use to add a comment about the attached lessons.
Hidden from Trainee	This option is disabled.

Note 1: Lessons are assigned with a due date that is equal to the follow-up date at the time of attachment.

Note 2: Assignment takes place only after the coaching session is saved.

Click **Attach**, to attach the selected lessons to the coaching session.

Click **View**, to open a new window to eLearning, showing the current assignments of the employee. This option is available only to users to whom the administrator has assigned privileges for viewing assigned lessons.

Click **Cancel** to close the window and return to the coaching session form page.

Adding Lesson Score Attachments This page allows you to attach lesson scores from eLearning to a coaching session. The fields displayed on this page include:

Field	Description
Name	(Required) The name of the attachment.
Employee Name	The full name of the employee to whom the attached lesson scores belong.
Selected Lessons	(Required) Click the **Selected Lessons** buttonto open a dialog with the lesson scores for assignment.
Comment	A free text field, up to a maximum of 200 characters, that you can use to add a comment about the attached scores.
Hidden from Trainee	Check the box if the attachment should not be visible from the trainee page.

Click **Attach**, to attach the selected lesson scores to the coaching session.

Click **View**, to open a new window to eLearning, showing the details of the lessons that were taken by the employee. This option is available only to users to whom the administrator has assigned privileges for reviewing lessons.

Click **Cancel** to close the window and return to the coaching session form page.

Adding Competency Attachments This page allows you to attach competencies from eLearning to a coaching session. The fields displayed on this page include:

Field	Description
Name	(Required) The name of the coaching result.
Employee Name	The full name of the employee to whom the attached competencies belong.

Field	Description
Selected Lessons	(Required) Click the **Selected Lessons** button to open a dialog with the competencies available for attachment.
Comment	A free text field, up to a maximum of 200 characters, that you can use to add a comment about the attached competency.
Hidden from Trainee	Check the box if the attachment should not be visible from the trainee page.

Click **Attach**, to attach the selected competency to the coaching session.

Click **View**, to open a new window to eLearning, showing the details of the employee's competencies. This option is available only to users to whom the administrator has assigned privileges for reviewing competencies.

Click **Cancel** to close the window and return to the coaching session form page.

Adding Contact Attachments This page allows you to attach contacts from Nortel Quality Monitoring to a coaching session. The fields displayed on this page include:

Field	Description
Name	(Required) The name of the attachment.
Employee Name	The full name of the employee to whom the attached contacts belong. Click the **Employee** button to select a different employee.
Date	(Required) The date range to query for contacts. Click the **Date** button to define the date range. The maximum number of days allowed is 30.
Comment	A free text field, up to a maximum of 200 characters, that you can use to add a comment about the attached contact.

Field	Description
Hidden from Trainee	Check the box if the attachment should not be visible from the trainee page.
Selected Contacts	(Required) A list of the available contacts for attachment. The fields displayed in this list for Nortel Quality Monitoring include: • **Content** – The type of content that was recorded (Voice , Screen Interaction or both). • **Name** – The ID of the contact in the Quality Monitoring system. • **Start Date** – The start date and time of the call. • **End Date** – The end date and time of the call. • **Duration** – The duration of the call in the format HH:MM:SS. • **Direction** – The direction of the call (for example, Inbound, Outbound) • **Triggered By** – Whether the contact was triggered by Quality Monitoring or Adherence. • **Employee was Primary** – Whether this agent was the primary agent on the call (Yes or No). Check the box for each contact to be attached.

Click **Attach**, to attach the selected contact to the coaching session.

Click **View**, to open a new window to Nortel Quality Monitoring showing the details of the highlighted contact. This option is available only to users to whom the administrator has assigned privileges for viewing contact attachments.

Click **Cancel** to close the window and return to the coaching session form page.

Adding Evaluation Attachments This page allows you to attach evaluations from Nortel Quality Monitoring to a coaching session. The fields displayed on this page include:

Field	Description
Name	(Required) The name of the attachment.
Employee Name	The full name of the employee to whom the attached evaluations belong. Click the **Employee** button to select a different employee.

Field	Description
Date	(Required) The date range to query for contacts. Click the **Date** button to define the date range. The maximum number of days allowed is 30.
Comment	A free text field, up to a maximum of 200 characters, that you can use to add a comment about the attached evaluation.
Hidden from Trainee	Check the box if the attachment should not be visible from the trainee page.
Selected Evaluations	(Required) A list of the evaluations available for attachment. The fields displayed in this list for Nortel Quality Monitoring include: • **Evaluator** – The full name of the employee who did the evaluation. • **Evaluation Form** – The name of the evaluation form. • **Score** – The score of the evaluation. • **Used for Calibration** - Whether this call was used for calibration of evaluators. (Calibration is done to ensure that evaluators' scores are within an acceptable range.) • **Evaluation Date** – The date when the evaluation was created. • **Contact Date** - The date and time of the call associated with the evaluation. Check the box for each evaluation to be attached.

Click **Attach**, to attach the selected evaluation to the coaching session.

Click **View**, to open a new window Nortel Quality Monitoring, showing the details of the highlighted evaluation. This option is available only to users to whom the administrator has assigned privileges for viewing evaluation attachments.

Click **Cancel** to close the window and return to the coaching session form page.

Viewing Attachments The following are the drill-through screens to which each attachment can link:

Attachment Type	Drill-Through Screen
File	Opens the uploaded file on the server.

Attachment Type	Drill-Through Screen
URL	Goes to the URL.
KPI	For managers: • **Scorecards>Explore Employees** For agents: • **My Home>My Scorecards**
Lesson Assignment	For managers: • **Learning>Lesson Assignments>Employee** For agents: • **Learning>My Learning>My Current**
Lesson Score	For managers: • **Learning>Review>People History** For agents: • **Learning>My Learning>Learning History**
Competency	For managers: • **Learning>Review>Competency** For agents: • **Learning>My Learning>Competencies View**

Attachments are opened in a new window.

Meeting Summary

This container allows you to summarize the coaching session meeting, and displays the following item:

Item	Description
Meeting Summary	The summary of the coaching session meeting.

You need to fill out this container after a coaching session has taken place.

Trainee Feedback

This container displays the feedback of the trainee to the coaching session meeting, and displays the following item:

Item	Description
Trainee Feedback	The feedback of the trainee to the coaching session meeting.

Review and Approval

This container displays the review and approval comments for the coaching session meeting. It is visible only when a coaching session has been completed, and displays the following items:

Item	Description
Approved	Check the box to approve the coaching session. Uncheck it to remove a previous approval. Add a comment when needed. This item is only visible if your administrator has assigned you privileges to review coaching sessions.
Reviewed/Approved By	A list of the employees who have reviewed and approved the coaching session, along with the user comments.

Deleting Coaching Sessions

To delete a coaching session:

Step	Action
1	Select the coaching session's organization in the left pane.
2	Select the coaching session that you want to delete.
3	Click **Delete**.

—End—

Note 1: If a coaching session is marked **Schedule in WFM** and has a schedule activity associated with it, you must delete the activity before you can proceed with deleting the session.

Note 2: If the coaching session has a status of **Coached** or above, only an administrator can delete the session.

Coaching Administration

The new section, **Coaching**, added to the **App Admin** module, contains two tabs: **Coaching Session Types** and **Coaching Results**. These tabs are primarily used by managers, supervisors, and administrators.

Coaching Session Types

The **Coaching Session Types** tab allows you to create, edit, delete, activate, or deactivate a coaching session type. A session type is associated with an organization. When you select an organization in the left pane, the list of the existing session types is displayed in the right pane.

The sessions type list displays the following columns:

Field	Description
Name	The name of the coaching session type.
Description	Free text, up to a maximum of 200 characters, describing the coaching session type.
Active	**Yes/No**. Specifies if a session type is active or not in the system. (This column is available only to users to whom the administrator has granted privileges to configure coaching session types.)

Note: The following information is only relevant for users to whom the administrator has granted privileges to configure coaching session types.

Editing Session Types

To edit a session type:

Step	Action
1	Select the session type's organization in the left pane.
2	Select the session type that you want to edit.
3	Click **Edit**.

—End—

Creating Session Types

To create a session type:

Step	Action
1	Select the organization in the left pane for which you want to create the session type.
2	Click **Create**.
3	Fill in the **Name** and **Description** fields as appropriate. ***Note:*** Duplicate names are not allowed within the same organization, or parent or sub-organization.
4	Select **Yes** or **No** as desired to make the session type active in the system.
5	Click **Save** to save your changes; click **Revert** to restore the page to the settings that were in force when you first opened it (provided you have not saved your changes), or click **Cancel** to return to the Coaching Sessions Type list page without saving changes.

—End—

Deleting Session Types

To delete a session type:

Step	Action
1	Select the session type's organization in the left pane.
2	Select the session type you want to delete.
3	Click **Delete**.

—End—

Note: If the session type is in use by Coaching-related applications, it is not deleted until the session type has been disassociated from all applications, but it can be deactivated (see "Deactivating Session Types" (page 35)).

Activating Session Types

Active session types are visible and can be used in Coaching-related applications.

To activate a session type:

Step	Action
1	Select the session type's organization in the left pane.
2	Select a deactivated session type that you want to activate.
3	Click **Activate**.

—End—

Deactivating Session Types

Non-active session types are hidden and cannot be used in Coaching-related applications once the session types have been deactivated.

To deactivate a session type:

Step	Action
1	Select the session type's organization in the left pane.
2	Select an active session type that you want to deactivate.
3	Click **Deactivate**.

—End—

Coaching Results

The **Coaching Results** tab allows you to create, edit, delete, activate, or deactivate a coaching result.

The sessions type list displays the following columns:

Field	Description
Name	The name of the coaching result.

Field	Description
Value	The decimal value of the coaching result.
Active	**Yes/No**. Specifies if a result is active or not in the system. (This column is available only to users to whom the administrator has granted privileges to configure coaching results.)

Note: The following information is only relevant for users to whom the administrator has granted privileges to configure coaching results.

Editing Results

To edit a result:

Step	Action
1	Select the result that you want to edit.
2	Click **Edit**.

—End—

Creating Results

To create a result:

Step	Action
1	Click **Create**.
2	Fill in the **Name** and **Description** fields as appropriate. ***Note:*** Duplicate names are not allowed within the same organization.
3	Select **Yes** or **No** as desired to make the result active in the system.
4	Click **Save** to save your changes; click **Revert** to restore the page to the settings that were in force when you first opened it (provided you have not saved your changes), or click **Cancel** to return to the Coaching Sessions Type list page without saving changes.

—End—

Deleting Results

To delete a result:

Step	Action
1	Select the result you want to delete.
2	Click **Delete**.

—End—

Note: If the result is in use by Coaching-related applications, it is not deleted until the result has been disassociated from all applications, but it can be deactivated (see "Deactivating Results" (page 37)).

Activating Results

Active results are visible and can be used in Coaching-related applications.

To activate a result:

Step	Action
1	Select a deactivated result that you want to activate.
2	Click **Activate**.

—End—

Deactivating Results

Non-active results are hidden and cannot be used in Coaching-related applications once the results have been deactivated.

To deactivate a result:

Step	Action
1	Select an active result that you want to deactivate.
2	Click **Deactivate**.

—End—

Coaching Alert Rules

The following Organization alert rules have been added to support Coaching in this release:

- **Coaching Session Alert**: An alert is sent when a Coaching session is saved with a status of:
  - **Meeting Scheduled**
  - **Await Trainee Feedback**
  - **Await Coach Follow Up**

- **Coaching Session Due Date Reminder**: An alert is sent when a Coaching session has a status of **Meeting Scheduled** and:
  - is due within a specified number of days

    or
  - has passed its due date

  These alerts can be configured to be sent no more than a specified number of times every day, hour, or minute. The minimum that can be specified is once every 60 minutes.

- **Coaching Session Reminder**: An alert is sent when a Coaching session is saved with a status of:
  - **Await Trainee Feedback**
  - **Await Coach Follow Up**

  These alerts can be configured to be sent no more than a specified number of times every day, hour, or minute. The minimum that can be specified is once every 60 minutes.

Scheduling Coaching in Forecasting and Scheduling

Several enhancements to Forecasting and Scheduling have been implemented to allow coaching sessions to be scheduled, much as learning sessions are currently scheduled in Forecasting and Scheduling.

A new activity type, **Coaching**, has been added.

In the **Calendar** module, you can use the **View Training Assignments...** menu item from the **Calendar** menu to open the dialog box for Coaching sessions. This dialog box is very similar to that used for Learning, however the columns **Time to Schedule (this period)** and **Maximum Break Length** are read-only, and a new column, **Assignment Type**, has been added at the end to indicate if the assignment is Learning or Coaching.

When breaks are created for Coaching, they have the activity type **Coaching** that was defined in the **Activity** module.

When Training breaks are created, the Comment field is constructed as **Assigned to <Lesson Assignment>**. However, each coaching session has a description field that you can use to add meaningful comments to the session. However, each coaching session has a description field that you can use to add meaningful comments to the session.

Coaching assignments can only be edited/deleted in the web application if there is no calendar event associated with them (such as when a coaching meeting has not yet been placed on the schedule).

> ***Note:*** A coaching assignment that is scheduled has a calendar event associated with it.

Once a calendar event is on the schedule, it can be manipulated in the same way as any other calendar event.

Nortel Workforce Management

Coaching Addendum

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