

EVOLVE

THE CLOUD STRATEGY COMPANY™

EVOLVE CONTACT SUITE: SUPERVISOR CLIENT USER GUIDE

Evolve Contact Suite: Supervisor User Guide
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Evolve IP® Guide

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1 Introduction


1.1 What is the Evolve Contact Suite Supervisor Client?

The Supervisor Client provides supervisors with actionable insight into current contact center activity with an intuitive dashboard view. It allows contact center leaders to control and monitor their assigned Business Processes and agent activities in real-time. It also allows supervisors to improve their Business Processes performance and productivity by enabling quality assurance monitoring.

The Supervisor Client allows contact center supervisors to:

- Manage agent activity.
- Monitor and manage Business Processes.
- Review agents status, activity and performance.
- Listen, coach and intervene on agent interactions.
- Manage abandoned and agent delegated calls.
- Handle interactions with the Supervisor's Agent.

These activities as well as other available activities are described in detail in this User Guide.

	<p>Note: You can access the supervisor client through Internet Explorer, Firefox browser with a "Microsoft .NET Framework Assistant" Add-on installed or Google Chrome with the "ClickOnce" extension installed that can be found in the Chrome web store.</p>
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1.2 Audience

This document is targeted at Contact Center Supervisors and Managers who will use the Supervisor Client.

1.3 Omnichannel

As consumer technology has changed, so have expectations around how customers interact with companies. Customers expect the ability to interact over multiple channels (email, text, web chat, social media, calls, etc.) seamlessly. Contact centers need to deliver outstanding customer service through omnichannel technology that empowers their agents' success.

Many contact centers struggle with multi-channel solutions that involve multiple technology silos that hinder customer satisfaction and management visibility. Evolve IP offers true omnichannel technology

2 Supervisor Client Overview

The Supervisor Client may be accessed and opened using the Application site. Your system administrator will assist you with your credentials and relevant URL to access the Application Site.

To start the Supervisor Client:

1. Open your browser and enter the link (provided by your system administrator) in the URL address bar. The Application Portal page opens.

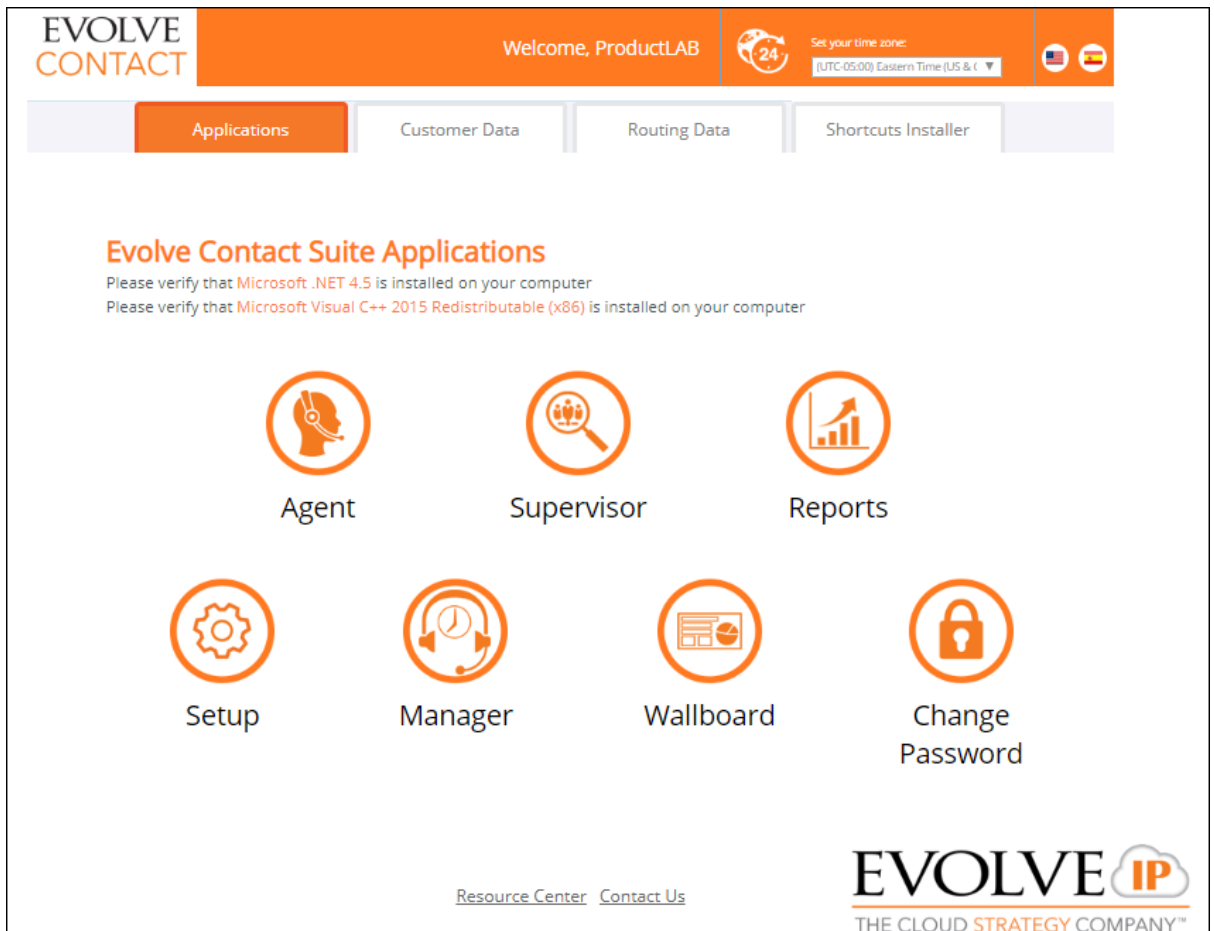
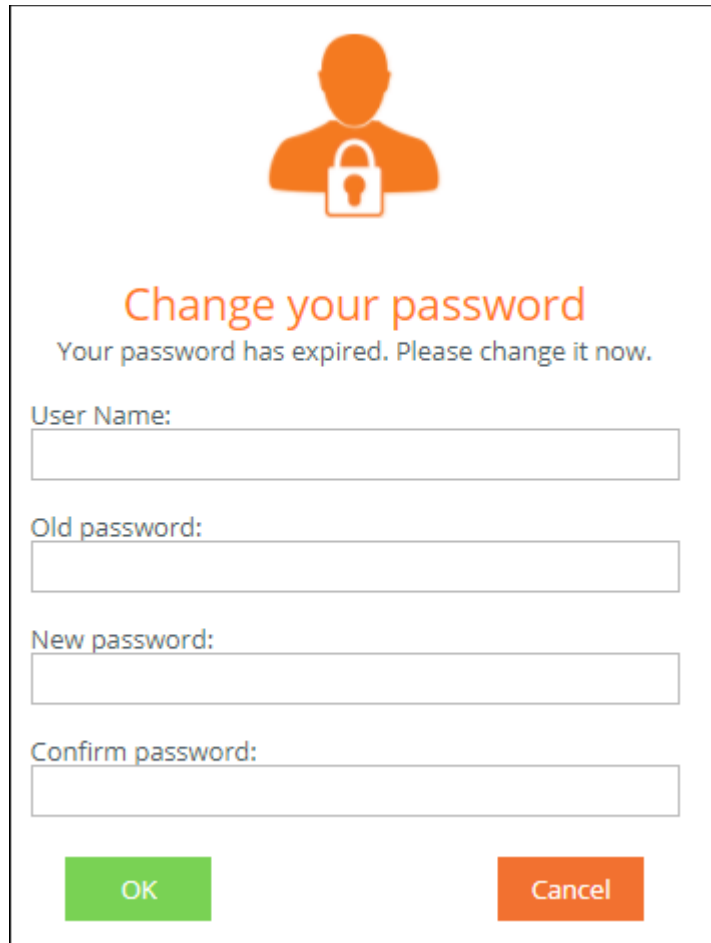


Figure 1: The Application Portal Page

2. If you are a first-time user, you will be required to change and confirm your password to log into the Supervisor Client.
3. Click the Change Password link to activate your account. The Change Password Window opens.

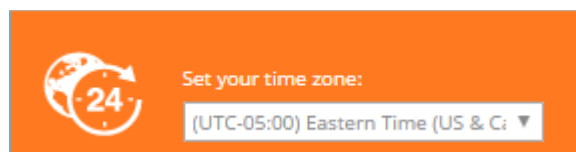




The image shows a 'Change your password' dialog box. At the top is an orange icon of a person with a padlock over their chest. Below the icon, the text reads 'Change your password' in orange, followed by 'Your password has expired. Please change it now.' in grey. There are four input fields: 'User Name:', 'Old password:', 'New password:', and 'Confirm password:'. At the bottom, there are two buttons: a green 'OK' button and an orange 'Cancel' button.

Figure 2: Change Password Window

3. Enter your User name.
4. Enter the original password (provided to you by your system administrator), enter a new password and then confirm the new password.
5. Click OK to save the new password. A message appears indicating that your password was successfully changed. Click 'Close Window'.
6. Make sure the **Time Zone** selection located in the upper right-hand corner of the Application Portal is properly set.



If you want to change it: click the **Time Zone** drop-down arrow and select the time zone in which the supervisor resides. This step is optional, as the supervisor may also select the relevant time zone via the Supervisor Client.

7. Click the Supervisor Icon to launch the Supervisor Client. The Launching Application window opens.

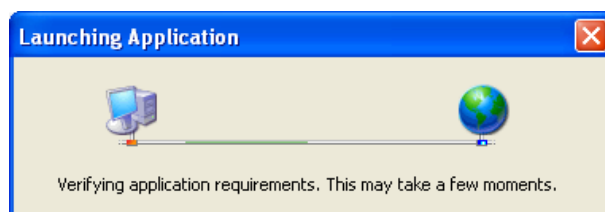
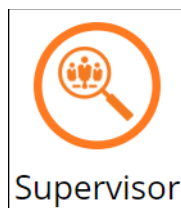


Figure 3: Launch Application Window

8. If this is the first time you are starting the Supervisor Client or if the client version was updated, you may be requested to accept the software download.

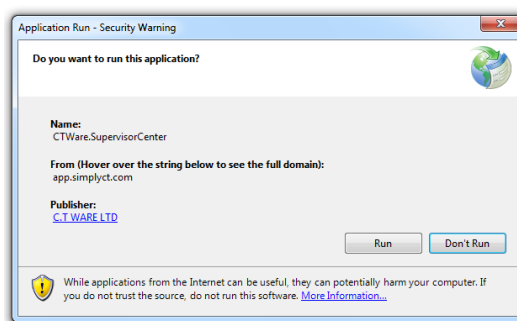


Figure 4: Application Run – Security Window

9. Click **Run** to accept the software download. The Supervisor Client starts downloading.

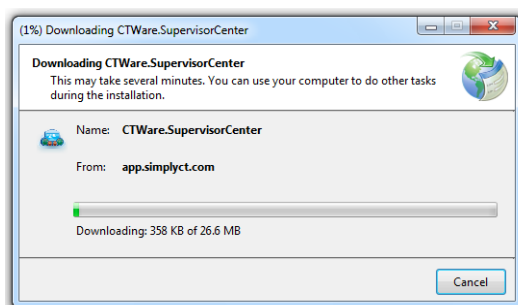


Figure 5: Application Download Window

10. After all the application requirements have been verified, the relevant authentication window opens, requiring you to enter a username and password.

The application's 'Splash' screen appears.

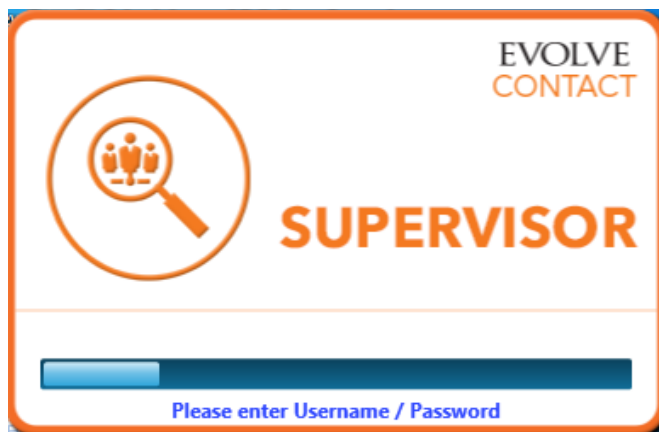


Figure 6: Supervisor Clients Splash Screen

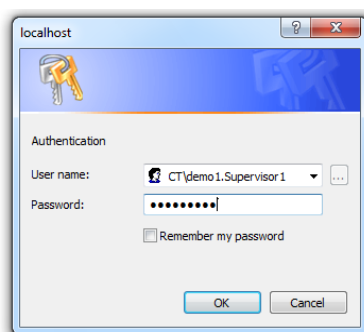


Figure 7: Authentication Dialog

11. Enter your user name and password. The Supervisor Client opens.

3 Supervisor Client Interface

The Supervisor Client provides supervisors with a real-time view of contact center resources and activities that will support better performance and ensure the quality of service. It enables the supervisors to monitor, manage and control the relevant 'Business Processes' they are in charge of.

The Supervisor Client was designed as a task-oriented user interface allowing supervisors to manage and control multi-tasking activities. It provides each supervisor with a comprehensive information display of all relevant agents and 'Business Processes'. The information is offered as a consolidated view utilizing various layouts, such as pie charts and table views. The Supervisor Client presents supervisors with the ability to drill down and receive detailed information for further investigation of the overall Business Process (also referred to as a BP in this document) performances.

3.1 Main Window

The main window shows the contact center's real-time key performance indicators.

Data is automatically collected from your contact center, measuring Business Process and agent performance, and presented graphically.

The figure below shows the Supervisor Client's main window.

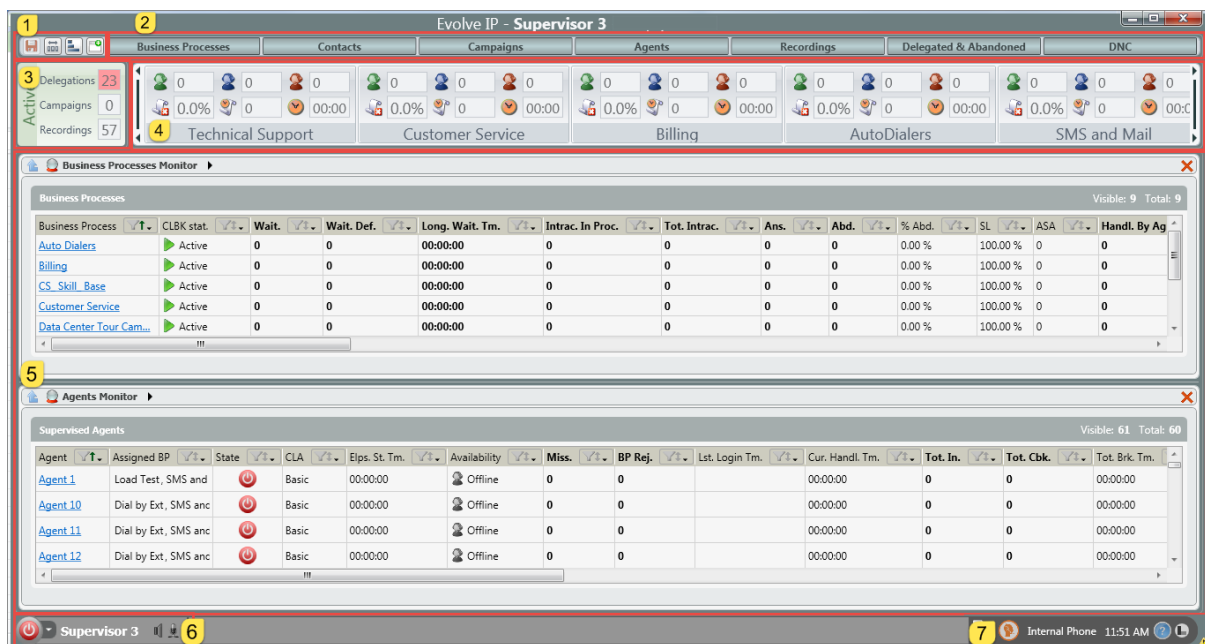







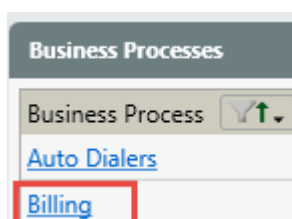
Figure 8: Supervisor Client Main Window

The Supervisor Client has seven sections: Quick Access bar, Index Bar, Active Box, Business Process Dashboard, Work Area Window, Supervisor Agent App Bar and Agent Business Process Assignment.

- 1. Quick Access bar** - Manage the display of the Dashboard, Indexes and Save any changes made within the Supervisor Client.

Item	Description
	Indicates no changes have been made and need to be saved.
	Indicates changes have been made that need to be saved. (ex. Changes were made to a Campaign Scheduling parameter and must be saved to take effect)
	Arrange the order of the Business Processes on the Dashboard.
	Expand or Collapse the Business Processes on the Dashboard – When expanded Supervisors are able to see results of the campaigns being run within each BP (ex. how many calls reached voicemail, no answer, busy)
	Toggle on/off to open each Index in a new window – If the Supervisor has dual monitors they can focus on the Business Processes and Agent Index on separate monitors. Click this button then click on Business Process or Agents.




2. **Index Bar** - All available Indexes to view and monitor within the Work Area Window.
3. **Active Box** - Provides Supervisors a quick count of Delegations, Campaigns, and Recordings currently active within all of the Business Processes they are responsible for.
4. **Business Process Dashboard** - Real-time view of the current state of each Business Process. This is scrollable left and right to see all Business Processes. Hover over a specific Business Process for a quick view or click to drill into a specific Business Process Monitor.
5. **Work Area** – Business Processes and all other Index options can be viewed, monitored, and drilled into via the Work Area. Selecting an Index will open a new view within the Work Area, dynamically changing the size of each Index view as more are selected.
 - a. To drill down, select the individual agent name, Business Process, campaign etc. found in each index.




6. **Supervisor Agent App Bar** – Provides Supervisors the capability of handling interactions, monitoring Agents, contact center personnel and / or customers. This has the same usage and functionality as the Agent Client.
7. **Agent Business Process Assignment and Report Scheduler**– Provides ability to temporarily assign agents to a Business Process for a specific period of time and grants access to Reporting.

3.2 Quick Access Bar

Manage the display of the Dashboard, Indexes and Save any changes made within the Supervisor Client.

- a.  Indicates no changes have been made and need to be saved.
-  Indicates changes have been made that need to be saved.
(ex. Changes were made to a Campaign Scheduling parameter and must be saved to take effect)
- b.  Arrange the order of the Business Processes on the Dashboard.

To arrange the Business Processes on the Dashboard:

1. Click . The 'Arrange Business Processes' window opens.

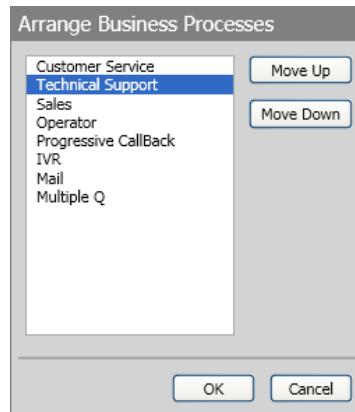




Figure 9: Arrange Business Processes Window

2. Select a Business Process from the list and click either 'Move Up' or 'Move Down', depending on where you want the BP to appear.
 3. Click 'OK' to save and close the window.
 4. Click 'Cancel' to discard any changes made and close the window.
- c.  Expand or Collapse the Business Processes on the Dashboard – When expanded Supervisors are able to see Disposition results of Business Processes or Campaigns
 - d.  Toggle on / off to open Indexes in a new window. If the Supervisor has dual monitors they can focus on both Business Processes and Agent Index on separate monitors. Toggle this button on, then click on Business Process or Agents.

3.3 Index Bar

The Index Bar allows you to view the following monitoring details in the Work Area:

- Business Processes
- Contacts
- Campaigns
- Agents
- Delegated & Abandoned
- DNC
- Recordings*

An index buttons color can change to red if there are warnings or alerts within in the BP, Campaign or Agent counters.



Figure 10: Index Buttons

* The Recordings Index may or may not be visible depending on your company's deployment.

For more details on how to work with index buttons see section 4.

3.4 Active Box

The Active Box displays a count of active Delegations, Campaigns and Recordings* currently active for the Business Processes the supervisor is responsible for.

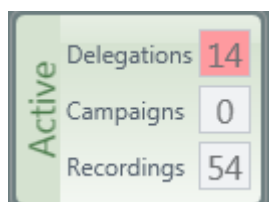



Figure 11: Active Box






* The Recordings Index may or may not be visible depending on your company's deployment.

3.4.1 Business Process Dashboard

The Business Process Dashboard is located directly under the Index Bar. The Dashboard lets the user view the assigned Business Processes. A detailed view of the selected Business Process is displayed in the Work Area. Hove over the Business Process to activate a quick view chart.

The panel indicates the following per Business Process:

- Available Agents  – agents who are currently joined to the queue and available to take a queued interaction i.e. can accept and handle incoming interactions or campaigns.

- **Busy Agents**  – agents who are currently occupied with queue interactions.
- **Unavailable Agents**  – agents who are not able to accept interactions as they are in an unavailable state i.e. break, lunch, training, paperwork, etc. back office mode or handling outgoing interactions.
- **Abandoned Interactions**  – how many interactions (this only includes inbound calls and inbound chats) were abandoned (from the time a shift started) while they were in the Business Process queue.
- **Waiting Interactions**  – how many interactions (this only includes inbound calls and inbound chats) are currently waiting in the Business Process queue.
- **Longest Waiting Time**  – what is the longest waiting time of an interaction (this only includes inbound calls and inbound chats) currently in the Business Process queue.

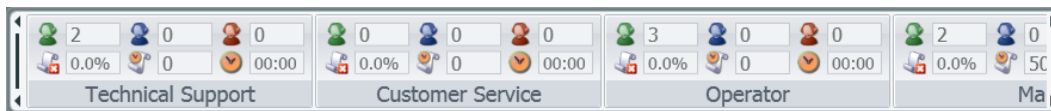




Figure 12: Business Process Dashboard

The Business Process Dashboard has scrolling controls which allow you to scroll either left or right and view other Business Processes in the panel.

Mouse-over  to move the panel left and  to move the panel right.

Mouse-over a Business Process in the Dashboard to view a chart pop-up window. The chart provides a breakdown of agent and interaction details per Business Process by percentage. The interaction pie chart shows interactions that arrived in the BP before entering the queue; interactions that are currently in the BP queue and interactions that ended within the BP (answered; abandoned; etc.).

The following interaction details are provided in the pop-up chart:

- **Answered** – Interactions answered by an agent. This includes both inbound and outbound interactions.
- **Abandoned** – Interactions that ended in the queue and were disconnected by the customer.
- **Waiting** – Interactions that are currently waiting in the queue.
- **Automatically Handled** – the interactions that ended while in the Business Process flow. This includes self-service interactions, interactions that are transferred to another BP or externally, interactions that leave a voicemail, interactions that become a callback, etc.
- **In Process** – the interactions that are currently in the Business Process flow and are not currently waiting in the queue.

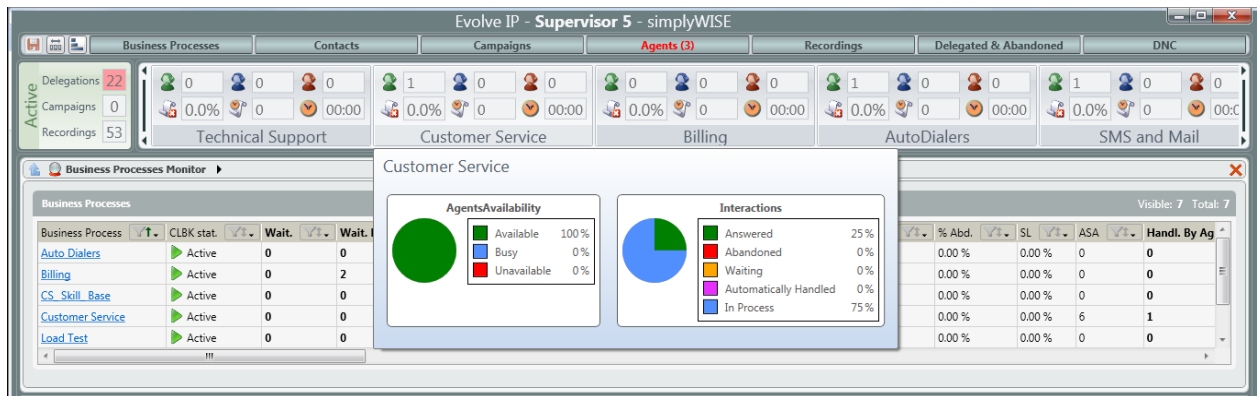



Figure 13: Business Process Pop-Up Chart

3.5 Work Area

The Work Area is composed of dynamic panes displayed in accordance with the tabs selected on in the Index Bar. The panes automatically re-arrange to fit multiple indexes into the Work Area.

For example, when you click the Business Process index, a list of all Business Processes are displayed in the Work Area. To view more details on a specific BP, click the relevant BP name to drill down in to it.

The Work Area can display Business Process, Campaigns, Agents, Delegated and Abandoned, DNC, and Contacts. You can close a panel from the Work Area by clicking  at the top right corner of each panel.

3.5.1 Dynamic Panes

Information is displayed in the Work Area within dynamic panes.

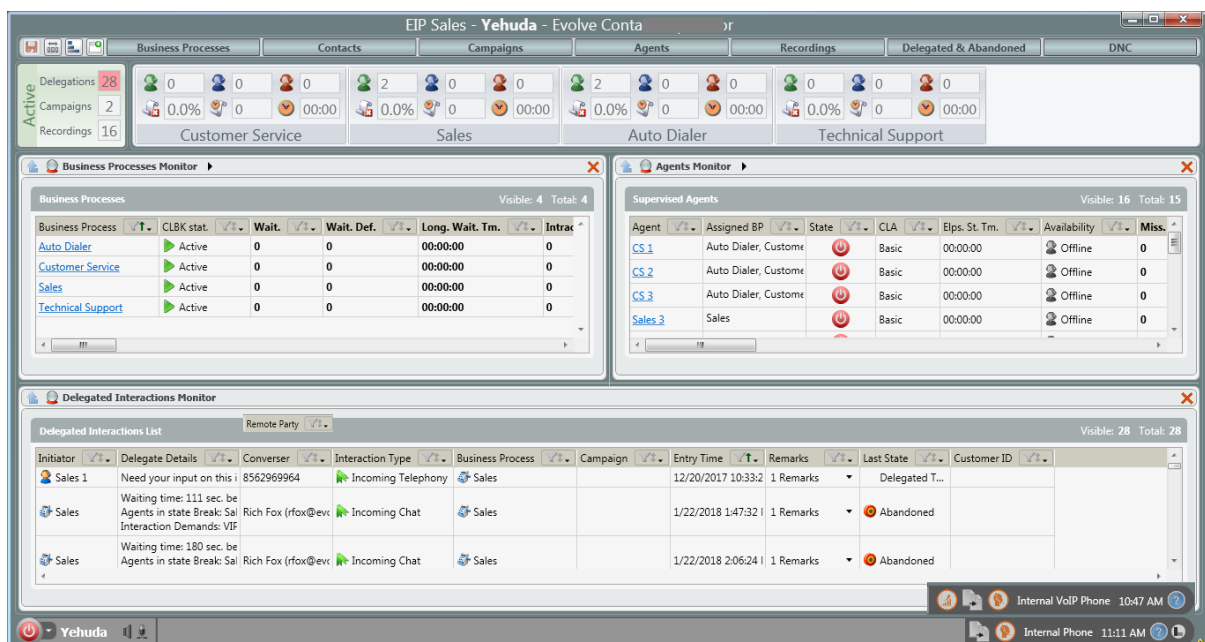



Figure 14: Work Area displaying several Dynamic Panes

Navigating Up in a Pane

By clicking  in one of the panels takes you back to the main index view. The arrow icon is disabled until you zoom in on the relevant panel.

Using Breadcrumb Trail Feature

The Breadcrumbs Trail allows you to quickly navigate between similar entities in the Index hierarchy.

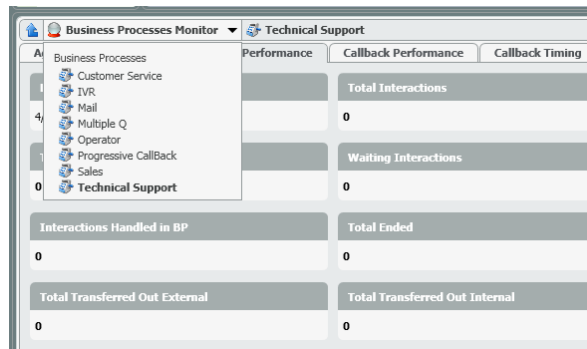


Figure 15: Breadcrumbs

The figure above shows how to navigate vertically through entities of the same index hierarchy e.g. Business Processes.

Example - Clicking on a different BP will take you to the same view as the current BP being monitored.

Drilling Down

Drilling down on information within the Work Area allows you to view specific metrics. You can use the following drill down methods:

- Right-click fields that appear in blue and are underlined.

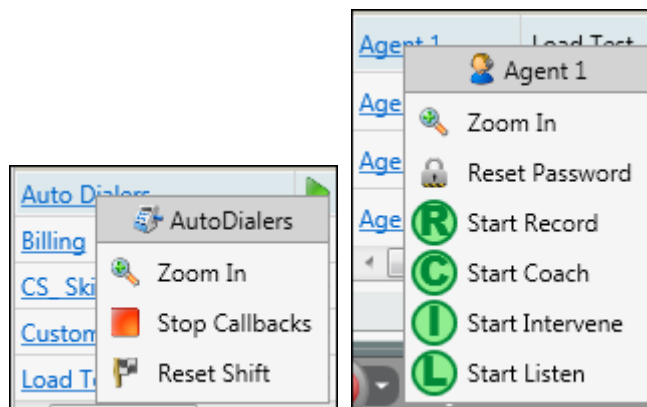



Figure 16: Agent and BP Drill Down Options

- Click the Key Performance Indicator drill down button ( - this icon appear alongside a bolded field value).

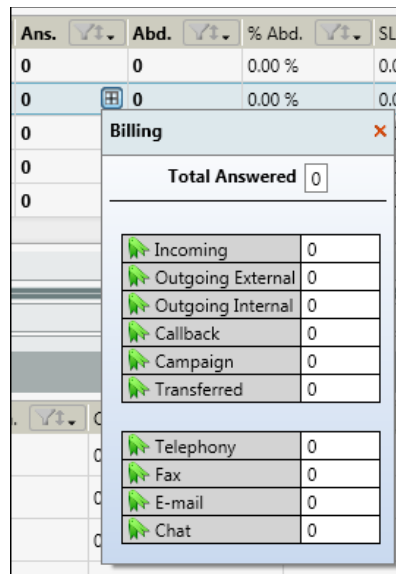



Figure 17: Key Performance Indicator drill down button

- Use the drill down short-cut menu.
 1. Click the Agent index button (). All available agents appear in the Work Area.
 2. Right-click on the agent you want to drill down on. An options menu opens.
 3. Click Zoom In.

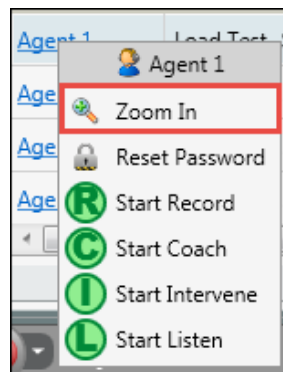



Figure 18: Zoom In Shortcut Menu

Investigating Real Time Key Performance Indicators (KPI)

- To investigate a Real Time KPI
 1. Locate the KPI field, which appears in bold.



Figure 19: Bold Field Value – Drill down

- Click . The data dimensions pop-up window will open. The information shown in this window depends on the relevant counter. For example, if you are viewing BP metrics, the information is displayed per BP; if you are viewing agent metrics, the information includes BPs, interaction types and media.

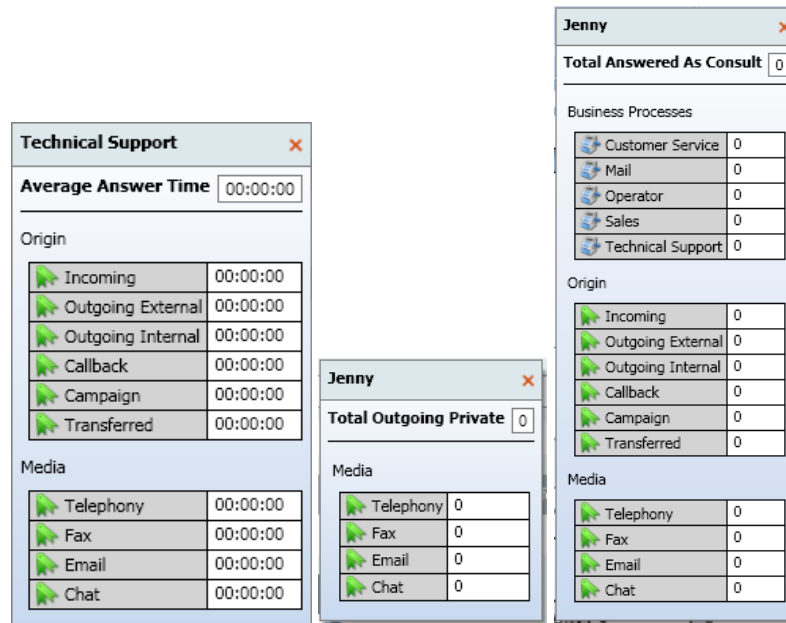


Figure 20: Data dimensions pop-up windows

Business Processes and other Index options can be viewed, monitored, and drilled into via the Work Area. Selecting an Index will open a new view within the Work Area, dynamically changing the size of each Index view as more are selected.

Viewing Business Processes

Business Processes can be viewed via the Work Area by clicking on the Business Process Index in the Index Bar. Initially all BPs are displayed. Selecting a specific Business Process allows supervisors to drill down and view real-time statistics on that BP.

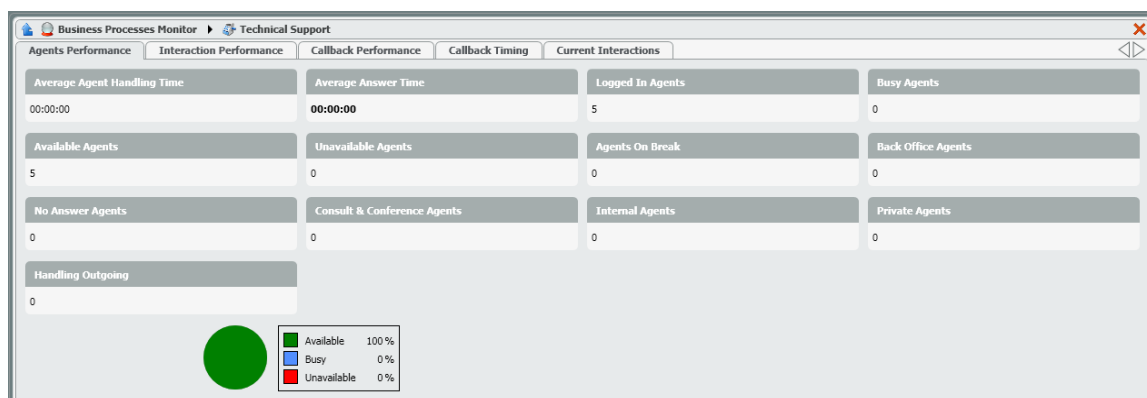


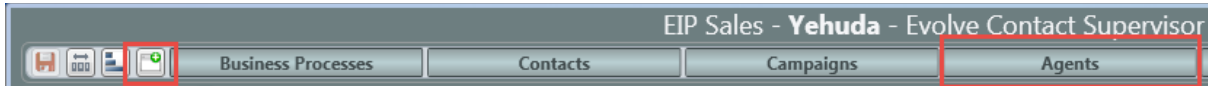
Figure 21: Business Process Details in Work Area

For more details on how to work with Business Processes, see section 4.2.

3.5.2 Open Indexes in Separate Monitors

Within the Quick access bar, the Toggle Icon allows Supervisors with Dual monitors to open individual Indexes into separate windows. They can focus on the Business Processes and Agent Index on separate monitors.

Click the toggle icon and then select the Index you would like to monitor in a separate window.




3.5.3 Title Bar

Title Bars can be found when opening indexes (Business Processes, Campaigns, Agents, Recordings*, DNC, Delegated & Abandoned and Contacts), in the Supervisor Client.

A Title Bar can be idle or active. By default, they appear as idle, displaying the number of visible objects on the screen as well as the total number of objects altogether.

The Title Bar automatically becomes active when you mouse over it.



Note: The number of visible objects on the screen and the total number of objects altogether change depending on the sort and filter criteria entered.

Example: Your contact center has a total of 20 agents defined in the system and you want to filter out all agents except those that are currently available (and there are 10 currently available, out of the 20 agents defined in the system), the numbers displayed would be 10/20 (visible object/total number of objects).

The Title Bar automatically becomes active when you mouse over a pane within the Work Area. The Title Bar color is dark gray when active and light gray when idle.

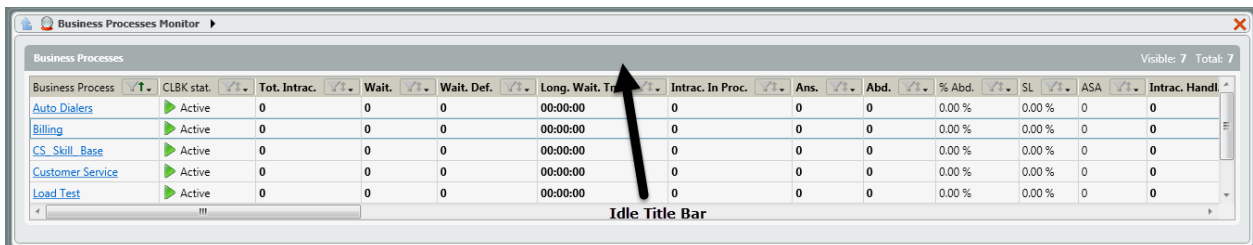


Figure 22: Idle Title Bar

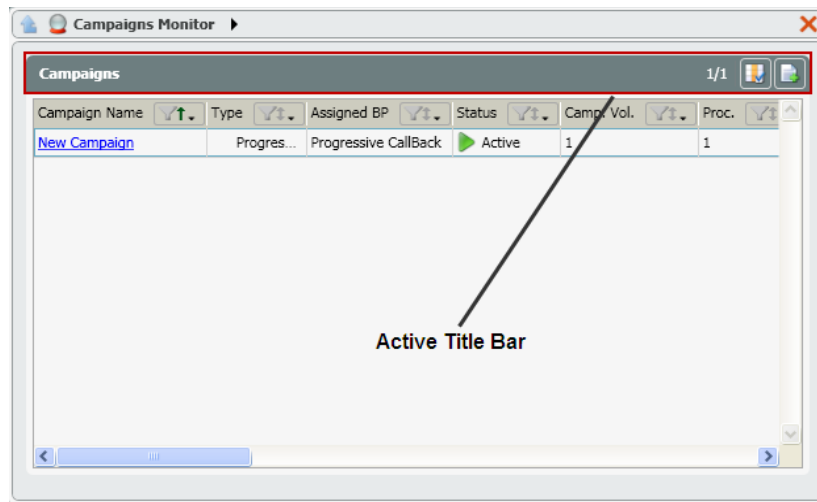


Figure 23: Active Title Bar


When the Title Bar is active, the following action can be performed:

- Column Selector – arrange and organize columns to appear in any order (for more details see section 3.5.3.1).
- Row Selector Feature - select an entire row by clicking anywhere within the white area of a cell row. A blue border appears around the selected row making it visible when scrolling to the left or right of the page.

3.5.3.1 Column Selector Feature

The column selector button is found at the top right corner of the 'Title Bar'. It allows you to arrange your columns (Key Performance Indicators) in any which order you prefer e.g. if you want the 'Avg. Handle. Tm' KPI in the Agent Index to appear first, you would use the Column Selector button to do so. You can also remove the KPIs that you don't want displayed in the columns by clearing the check box.

- **To use the column selector feature**

1. Click . The Column Selector window opens, displaying a list of all KPIs in the specified index.

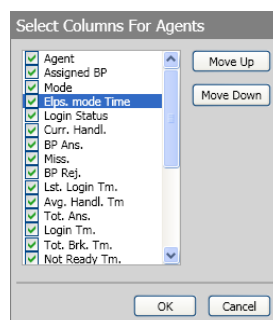



Figure 24: Column Selector Window

2. Click on a KPI in the list (e.g. Elapsed Mode Time).

3. Click  to move the specified KPI down one (e.g. the Elapsed Mode Time KPI you selected will now appear after the Login Status KPI).

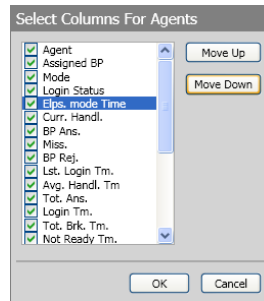
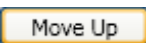
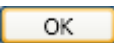
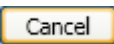


Figure 25: Column Selector Window

4. Click  to move the selected KPI up.
5. Click  to save changes and close the Column Selector window.
6. Click  to close the window without saving.

3.5.3.2 Sort and Filter Feature

Use the Sort feature to sort the view in a different order (e.g. ascending and descending – numerically and alphabetically) or the Filter feature to see only the records that match certain criteria.

You can apply one sort and multiple filters when viewing Agents, BP, Campaign, Recordings, Contacts, DNC, and Abandoned & Delegated indexes.

Sorting

A sort can be performed only on one column at a time, sorting another column cancels the previous sort.

- **To use the sort feature**






1. Hove over  the filter / sort and a pop-up menu is displayed.



Figure 26: Sort Filter Pop-up Menu

	<p>Note: When no sort has been applied to a column, the arrow in the sort/filter icon will appear gray.</p>
---	---


2. Click [Apply Sort](#), the arrow in the sort/filter icon turns green and points upwards () indicating it has been activated and is sorting in ascending order.
3. Mouse-over  and select [Apply Sort](#) again, and the records in the column will be sorted in descending order. The arrow in the sort/filter icon now points downwards ().




Filtering

Use the Filter to find specific data. The system will present only matching results.

The filter feature filters the data according to the records that are specific to each column (e.g. If you are filtering through the records in the 'State' column, a list of all the available states will be displayed allowing you to select the relevant agent states).

- **To use the filter feature**

1. Mouse-over  the filter / sort pop-up menu is displayed (See Figure 24 above).
2. Click [Define Filter](#), the relevant filter widow opens.
3. Select the 'Filter enabled' checkbox (Filter enabled) to enable the filtering feature.
4. Select the data that you want filtered from the list.
5. Clear the relevant checkbox to deselect the specific record from being filtered.

	<p>Note: When no filter has been applied to a column,  will appear gray. When a filter has been applied its color changes to green ().</p>
---	--


Filtering Options

A filter may be applied based on a number of parameters:

- Text – filters and presents data based on the text entered (e.g. added Agent name).
- Values – filters and presents data based on selected values in a list of available values (e.g. Agent State).
- Quantity – filters and presents data based on a range of values entered (less than or equal to and greater than or equal to).
- Alerts – filters and presents data according to the selected alert levels.
 - Normal – all records matching the range are displayed.
 - Warning – only the records with a warning or alert value are displayed.
 - Alert – only records with an alert value are displayed.

- Active Time – filters and presents data based only on alert levels (e.g. Elapsed Agent State Time).
Static Time – filters and presents data based on a date/time range (e.g. Campaign Start Time).

To filter records based on text

1. Mouse-over  the filter / sort pop-up menu is displayed.
2. Click [Define Filter](#) , the text filter widow opens.

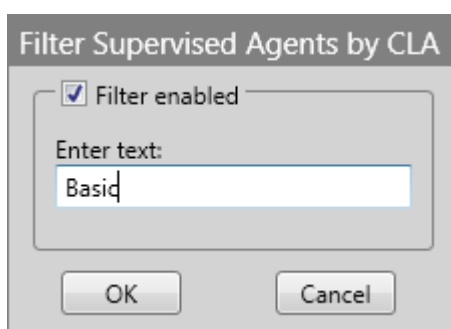
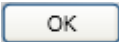
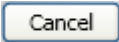



Figure 27: Text Filter Window

3. Select the 'Filter enabled' checkbox to enable the filtering feature.
4. Type in the relevant text that you want filtered in the 'Enter text' field.
5. Click  to apply the filter. The filter icon color changes from gray to green indicating that it has been enabled.
6. Click  to ignore the filter command you just defined.
7. To de-activate the filter, clear the 'Filter Enabled' checkbox and click OK.

To filter records based on values entered

1. Mouse-over  the filter / sort pop-up menu is displayed.
2. Click [Define Filter](#) , the value filter widow opens.

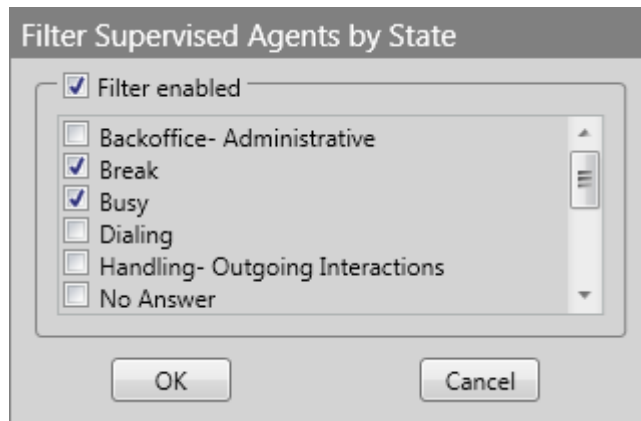
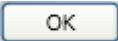
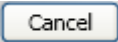



Figure 28: Value Filter Window

3. Select the 'Filter enabled' checkbox to enable the filtering feature.
4. Select the relevant value(s) from list of available values. For example, if you are filtering the different Agent States available and you select the 'Busy' check box, only those agents who are currently in a busy state will be displayed.
5. Click  to perform the filter. The filter icon color changes from gray to green indicating that it has been activated.
6. Click  to ignore the filter command you just defined.
7. To de-activate the filter, clear the 'Filter Enabled' checkbox and click OK.

To filter records based on quantities entered

1. Mouse-over  the filter / sort pop-up menu is displayed.
2. Click [Define Filter](#) , the quantities filter widow opens.

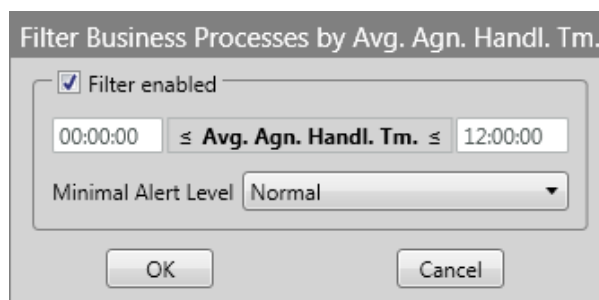
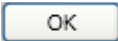
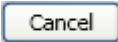



Figure 29: Quantity Filter Window

3. Select the 'Filter enabled' checkbox to enable the filtering feature.
4. Enter a numeric value in the less than and equal to text box.
5. Enter a numeric value in the greater than and equal to text box.
6. Select either 'Normal', 'Warning', or 'Alert' from the 'Minimal Alert Level' drop-down list.

7. Click  to perform the filter. The filter icon color changes from gray to green indicating that it has been activated.
8. Click  to ignore the filter command you just defined.
9. To de-activate the filter, clear the 'Filter Enabled' checkbox and click OK.

To filter records based on alerts entered

1. Mouse-over  the filter / sort pop-up menu is displayed.
2. Click [Define Filter](#) , the alerts filter widow opens.

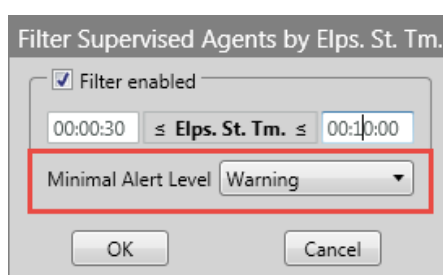
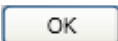
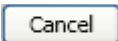

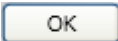
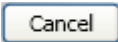


Figure 30: Alerts Filter Window

3. Select the 'Filter enabled' checkbox to enable the filtering feature.
4. Select either 'Normal', 'Warning', or 'Alert' from the 'Minimal Alert Level' drop-down list.
5. Click  to perform the filter. The filter icon color changes from gray to green indicating that it has been activated.
6. Click  to ignore the filter command you just defined.
7. To de-activate the filter, clear the 'Filter Enabled' checkbox and click OK.


To filter records based on alert time entered

1. Mouse-over  the filter / sort pop-up menu is displayed.
2. Click [Define Filter](#) , the active time filter widow opens.
3. Select the 'Filter enabled' checkbox to enable the filtering feature.
4. Select either 'Normal', 'Warning', or 'Alert' from the 'Minimal Alert Level' drop-down list.
5. Click  to perform the filter. The filter icon color changes from gray to green indicating that it has been activated.
6. Click  to ignore the filter command you just defined.
7. To de-activate the filter, clear the 'Filter Enabled' checkbox and click

OK.

To filter records based on static time entered

Filtering records based on static time entered is only available for date/time fields like “Last Login Time.”

1. Mouse-over  the filter / sort pop-up menu is displayed.
2. Click [Define Filter](#) , the static time filter widow opens.

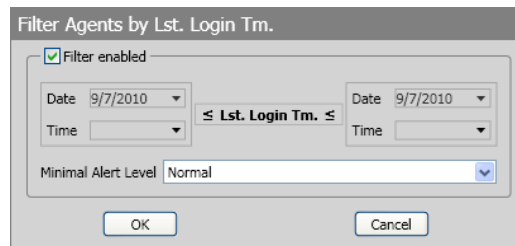
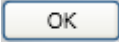
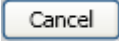


Figure 31: Static Time Filter Window

3. Select the ‘Filter enabled’ checkbox to enable the filtering feature.
4. Select the less than and equal to date and time value from the date and time drop-down list.
5. Select the greater than and equal to date and time value from the date and time drop-down list.
6. Select either ‘Normal’, ‘Warning’, or ‘Alert’ from the ‘Minimal Alert Level’ drop-down list.
7. Click  to perform the filter. The filter icon color changes from gray to green indicating that it has been activated.
8. Click  to ignore the filter command you just defined.
9. To de-activate the filter, clear the ‘Filter Enabled’ checkbox and click OK.

3.6 Supervisor Agent App Bar

The Supervisor Agent App Bar lets you engage with your agents, contact center personnel and / or customers. It has the same functionality as the Agent Client.

The Agent App Bar stores relevant contacts such as agents, supervisors, external contacts as well as channel and Business Process entities.

The Phonebook displays the availability status of agents, supervisors, and non-contact center users within the organization. In order to see the phonebook, you must be logged in and in an available state.



Figure 32: Supervisor Agent App Bar (bottom of window)


Quick Access Commands

The Supervisor Agent App Bar contains the Information Interaction Bar which provides details about the current interaction:

 - The media type icon changes based upon the interaction type (call, chat, email, etc.)

Stephany - The number or name of the person that contacted you or vice versa

00:00:11 - The interaction handling time

 - The quick access command button is displayed when the information panel is closed. It provides Supervisors with a quick access button that will perform a relevant command (in this case, the close/end interaction command is displayed) Provides Supervisors with a quick access button that will perform a certain relevant command (in this case the command is to close/end the interaction).

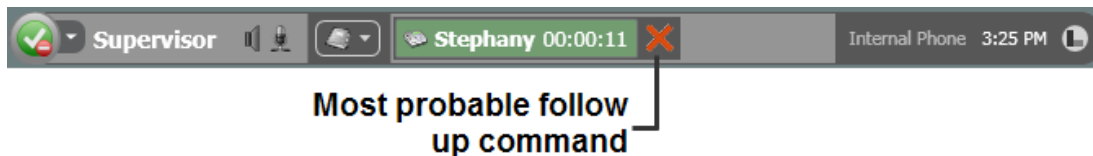


Figure 33: Supervisor Agent App Bar (bottom of window)


The Interaction Information Bar background color changes to green or black depending on the command performed.

If the Interaction Panel is closed, open it by left-clicking the Interaction Information Bar.

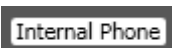
The Interaction Information Bar may display more than one interaction at a time, depending on how many interactions you are allowed to handle simultaneously.

3.6.2 Selecting a Phone Number to take calls on

This is the phone number that a Supervisor will use when placing and receiving calls. The number selected can be either their Internal Phone Number, a Predefined number (these numbers are added in the Setup portal), or an Ad Hoc number. Selecting a Supervisor

Phone Number may only be done when the Supervisor is in Offline  Offline mode.

- To select a supervisor's phone number

1. Click  on the right side of the Agent App Bar. The Select Telephony Terminal window opens. Depending on what was previously defined, the ad-hoc / predefined number may appear instead of 'Internal Phone'.

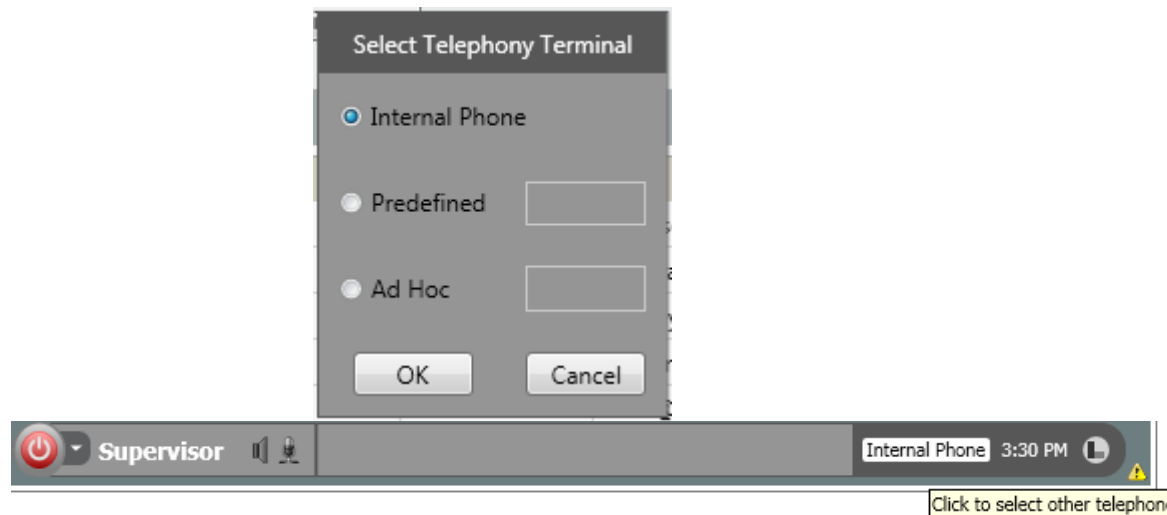

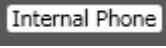



Figure 34: Select Terminal Number

	<p>Note: If an Internal Phone number has been defined and setup as the default number to be used, you will see , instead of a number. Using the 'Internal Phone' options activates the Speaker and Volume buttons.</p> <p>If the Supervisor's client has been setup with an Ad Hoc or Predefined number and set as the default number to be used within the Setup Portal, the number that was defined (e.g. ) will appear on the right of the Supervisor's Agent App Bar.</p> <p>Internal Phone will always be the default setting.</p>
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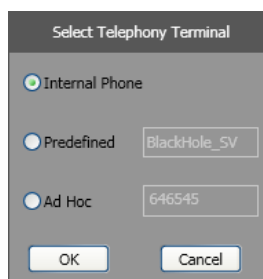


Figure 35: Select Telephony Terminal Window

Perform either one of the following:

- Select the 'Internal Phone' radio button to set your internal telephone extension. The 'Speaker' and 'Microphone' button appears on the Supervisor's Agent App Bar (See section 3.6.3 for more details).
 - Select the 'Predefined' radio button if you want to select a terminal number that was already defined in the system, from a list of numbers. A list of terminal numbers previously defined during provisioning will appear in the drop-down list.
 - Select the 'Ad Hoc' radio button, if you want to enter a random terminal number that was not defined during provisioning. Enter the relevant terminal number in the text box.
10. Click to save your entry. The terminal number will appear on the far right of the Supervisor Agent App Bar.
 11. Click to clear your entry.

3.6.2 Using the DTMF Touch Tone pad

When using the Internal Phone, you must connect headphones to your PC. During an active call the DTMF Touch Tone button appears. Clicking this button opens the DTMF Touch Tone Pad, which allows you to send Dual Tone Multi-Frequency

signals (DTMF). You may also use your keyboard numbers (0-9, # and *) to send DTMF signals.

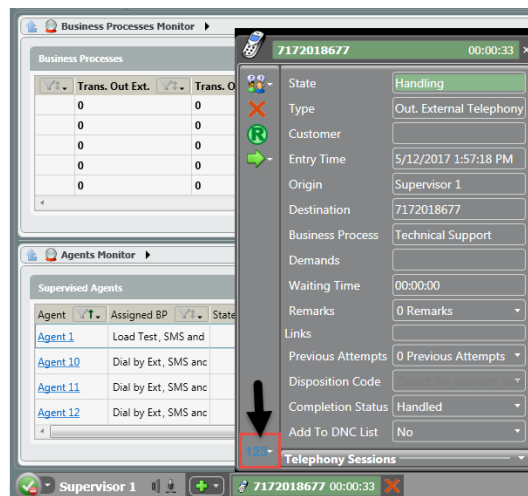


Figure 36: DTMF Touch Tone button

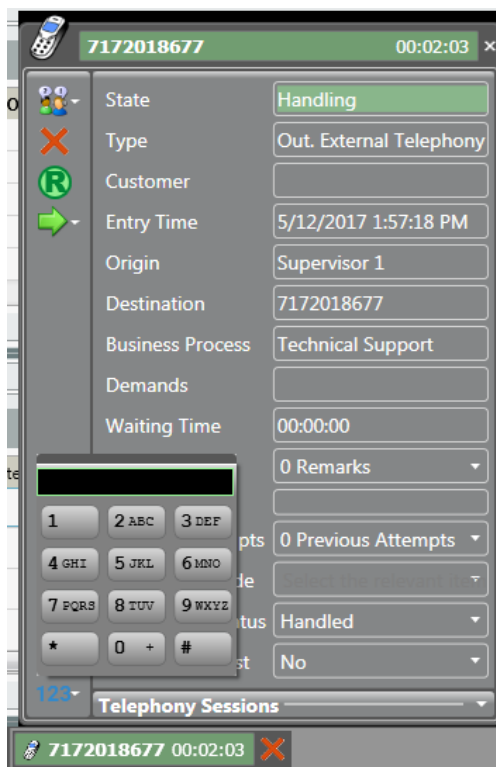


Figure 37: DTMF Touch Tone Pad Open

3.6.3 Adjusting the Speaker and Microphone Button

The speaker and microphone button appears on the left side of the Supervisor's Agent App Bar. They become active only when the 'Internal Phone' is used.

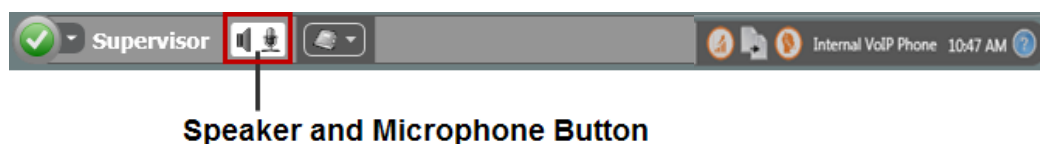


Figure 38: Speaker and Microphone Button

- **To adjust your speaker and microphone volume**

1. Mouse-over the speaker and microphone button to view a tooltip, which indicates their volume percentage.

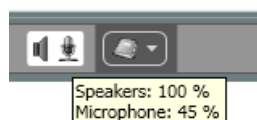


Figure 39: Speaker and Microphone Volume Percentage Tooltip

2. Click the speaker and microphone button, a pop-up slider appears allowing you to adjust the speaker and microphone volume. Drag the slider up to increase volume or down to decrease volume.



Figure 40: Speaker and Microphone Volume Popup Slider

3. Drag the sliders all the way to the bottom to mute both the speakers and microphone.



Figure 41: Mute Speaker and Microphone Volume on Popup Slider

3.6.3.1 Selecting Audio Devices

You can define which speaker and microphone device to use, by clicking the settings icon found in the Speaker and Microphone popup slider. The system automatically selects the audio devices. If other devices are available, you can change the selected speaker or microphone by choosing a device from the drop-down list.

- **To select speaker and microphone audio devices**

1. Click . The Select Audio Devices window opens.

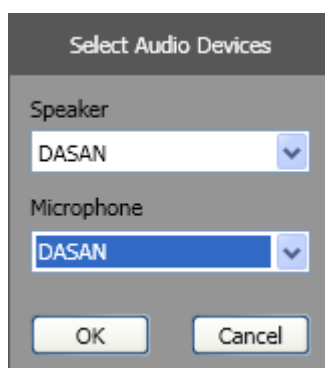

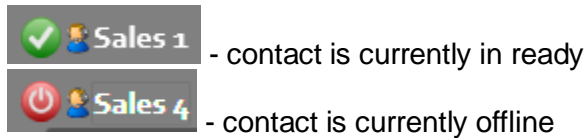


Figure 42: Select Audio Devices Window

2. Select the speaker or microphone you want to use from the drop-down list.
3. Click OK to save your selection and exit the 'Select Audio Devices' window.
4. Click Cancel to discard changes.

3.6.4 Using the App Bar

1. Select one of the Supervisor States (except for Offline).
2. **Contacts** - Click  to open the Phonebook. The contacts tab is automatically displayed.
 - The Contacts tab displays the different agent/supervisor availability modes (e.g., supervisors, agents, Enterprise Directory, Business Entities Business Processes and Channel)..



The Phonebook allows you to search contacts, dial and email contacts as well as chat with agents and supervisors.



3. Enter a name in the filter box to search for a contact. The system filters the information entered, presenting only the results that match.
4. Click  to clear the filter.



Figure 43: Supervisor Agent App Bar Phonebook (Contacts Tab)

5. Click one of the interaction types available (Chat, Email, or Telephony) to interact with the relevant agent or Business Process.
6. Select the relevant BP from the drop-down list.

7. **Dial Tab** - You may use the Dial Pad to enter a phone number and place a call.
 - Select the Dial tab at the bottom of the panel
 - Select the relevant Business Process
 - Use the Dial Tab to enter a phone number, use your keyboard, or paste a number
 - Click  to place the call.

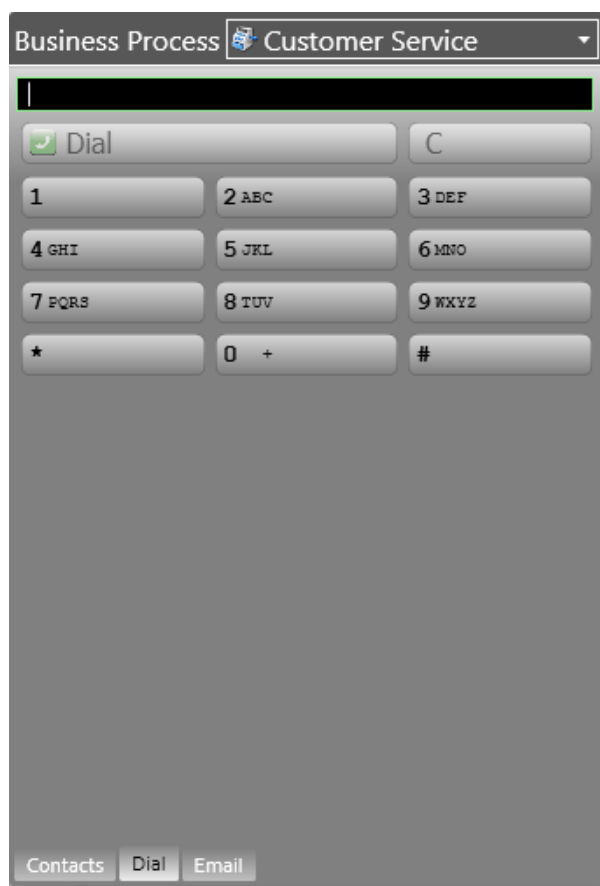


Figure 44: Supervisor Phonebook (Dial Tab)

8. **Email Tab** - The Email tab allows you to send an outgoing email from a specific business process.
 - Selecting the creating option, will create a new email interaction and allowing you to enter in all the relevant contact information for the party you are trying to reach.

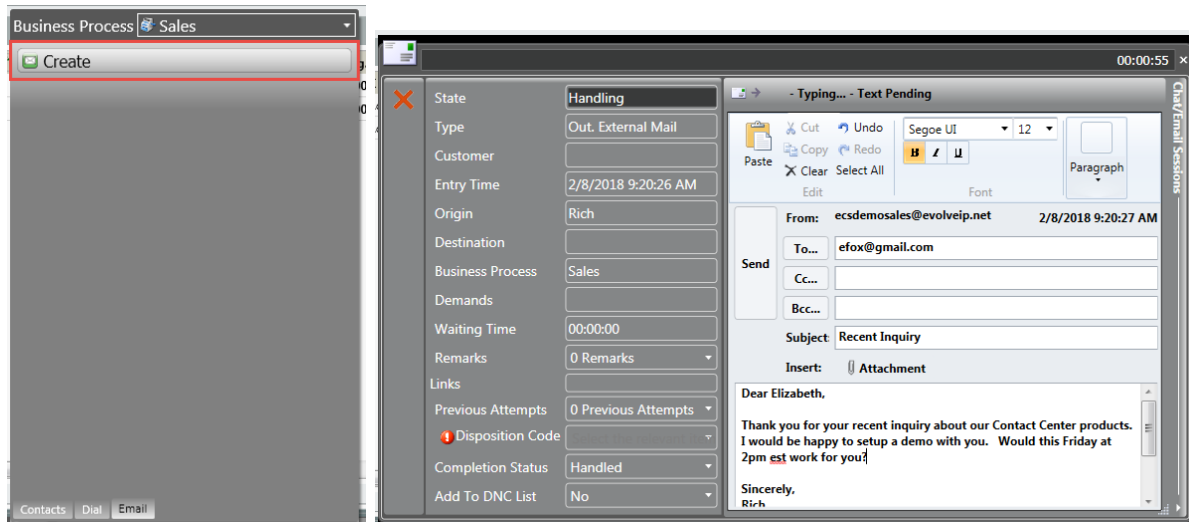









Figure 44b: Supervisor Modes


9. Click  to close the Phonebook

3.6.5 Supervisor Modes

By selecting a state, the system knows how to interpret what the supervisor is currently doing.

The following states exist:

Icon	State
	Offline
	Break
	Back Office
	Handle Outgoing
	Ready
	No Answer (assigned by the system when an Agent or Supervisor does not answer interactions)

To change the Supervisor's state, click  and select the relevant state from the menu that opens.

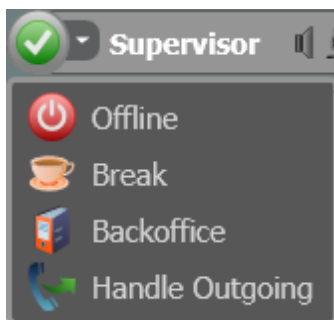


Figure 45: Supervisor Modes

3.7 Interact with Agents

Supervisors may perform quality assurance, training, and monitoring activities on any of the agents to improve Business Process performance and increase agent efficiency.

The following commands are available:

- Record
- Coach
- Intervene
- Listen
- Retrieve
- Reset Password
- Change Agent State
- Change Agent Load Allowance
- Close All Interactions
- Hang up Interaction

To see the shortcut menu displaying the different commands, right-click an agent's name in the Agent Work Area or within the Current Interactions of a Business Process:

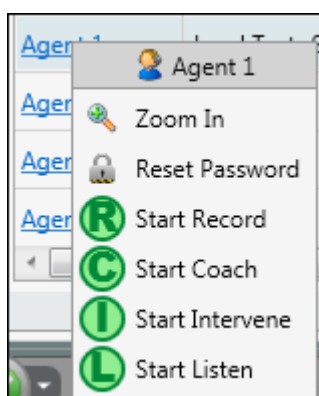


Figure 46a: Supervisor (Right-click) Command Menus

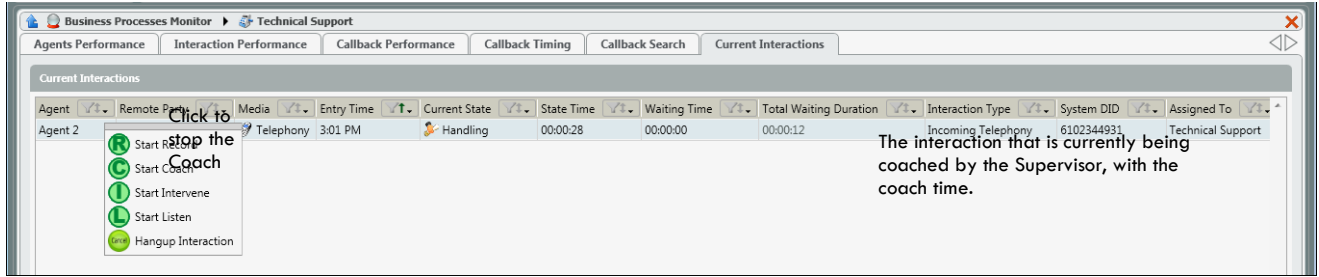


Figure 46b: Supervisor (Right-click) Command Menus

3.7.1 Coach

The Coach command is used for training and support purposes for phone calls only. You might use this command to assist agents with complicated or problematic interactions, or for training new agents. Once executed, you will be able to view, hear and coach phone calls without alerting the customer.

To use the Coach command

1. Choose which agent to 'Coach' and right-click their name in the Work Area. A pop-up menu displays the available commands.
2. Click Start Coach. An interaction window opens on the Supervisor's App Bar indicating the Coach command is in progress and the agent may be coached / trained.
3. The Coach command icon changes to .

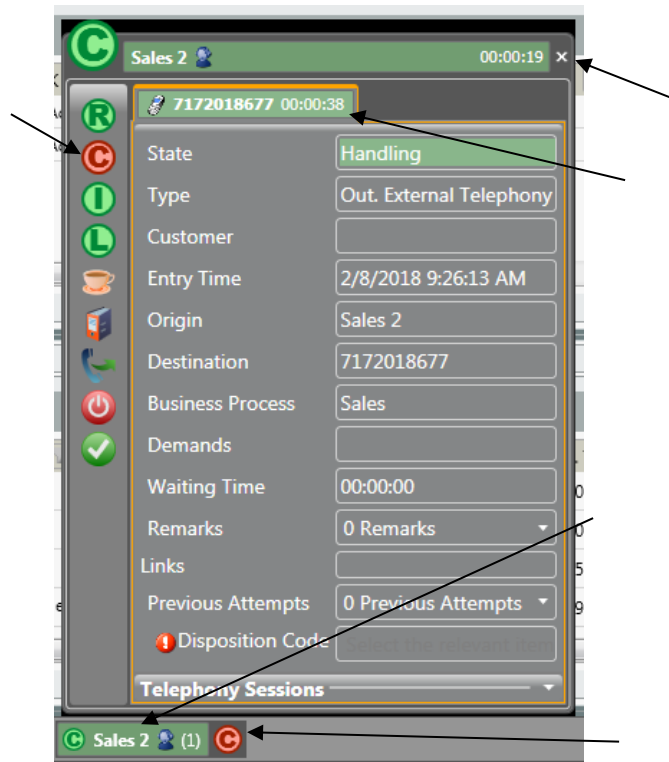



Figure 47: Supervisor Coach Command

4. Right-click the agent's name in the Work Area and click  to stop coaching. The Coach command is terminated and the interaction window disappears from the Supervisor's App Bar.



Note: If Consult or Hold is used while coaching an agent, the agent will not hear waiting music.

Scenarios:


- The agent handles two voice interactions (one is on "Hold") – you will be able to see and coach both voice interactions and to hear and coach the active interaction.
- The agent switches between voice interactions – you will always hear and be able to coach the active one.
- You choose to coach another agent - the coach activity on the previous agent is stopped automatically, and you start coaching the newly selected agent and their interaction.


3.7.2 Intervene

This command allows you to join an interaction. Once this command is executed, all three parties (customer, agent, and supervisor) are engaged in a conference call.

Note: If you decide to Intervene another agent's interaction while currently "intervening" on another agent - the Intervene command on the previous agent is stopped automatically, and the Intervene command is started on the newly selected agent's interaction.

To use the Intervene command

- To Intervene on an Agent's call, right-click on their name in the Work Area. A pop-up menu displays the available commands.
- Click  Start Intervene. An interaction window opens on the Supervisor's App Bar indicating that the Intervene command is in progress and you are now part of the interaction.

The Intervene command icon changes to  on the Supervisor's App Bar.

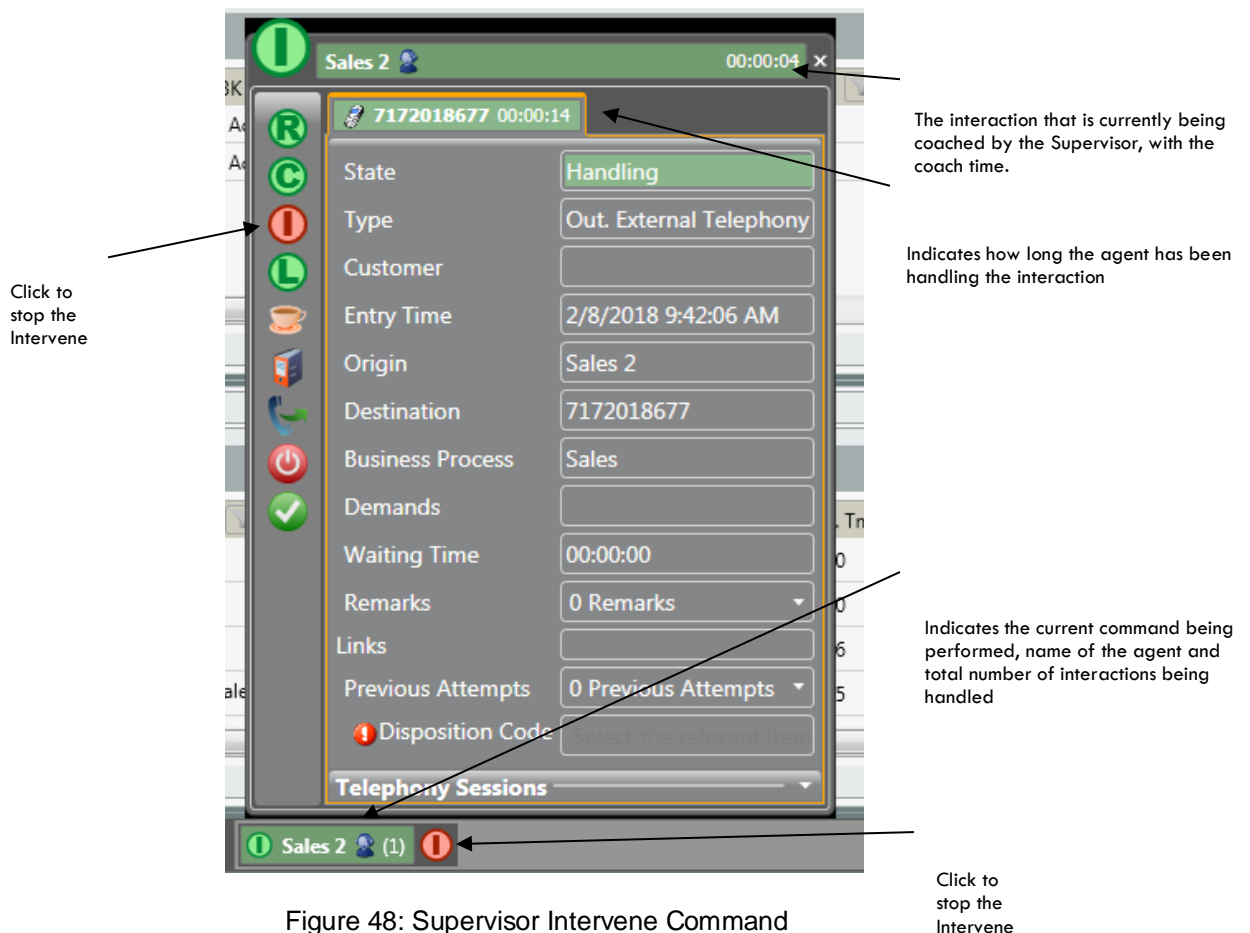





Figure 48: Supervisor Intervene Command

- Click  to stop the Intervene command. The Intervene command is terminated and the interaction window disappears from the Supervisor's App Bar.

	<p>Note: If an agent is busy handling more than one interaction, the intervened interaction appears with a green background (indicating an active voice interaction), while the others appear with a red background.</p>
---	--

3.7.3 Listen

This command is used to silent monitor an agent’s call or web chat. When selected, you will hear and/or view the agent interaction.

	<p>Note: The agent is unaware they are being listened to.</p>
---	---

Scenarios:

- The agent handles two chat sessions and two voice interactions (one is on "Hold") – you will be able to see both chat sessions and hear the active interaction.
- The agent switches between voice interactions - you will always hear the active one.
- The agent transfers one of the interactions – if you would like to follow the transferred interaction you'll need to perform a "Listen" on the other agent that the interaction was transferred to.

To use the Listen command

1. Choose which agent you want to 'Listen' to and right-click their name in the Monitoring View area. A pop-up menu displays the available commands.

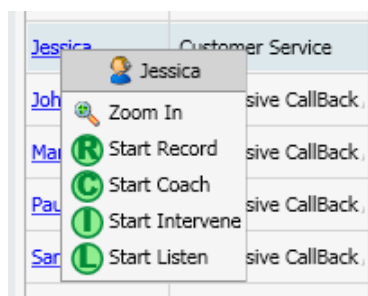
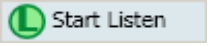



Figure 49: Selecting the Listen Command

2. Click . An interaction window opens on the Supervisor's App Bar indicating that the Listen command is in progress and you are able to hear the interaction.
The Listen command icon changes to .

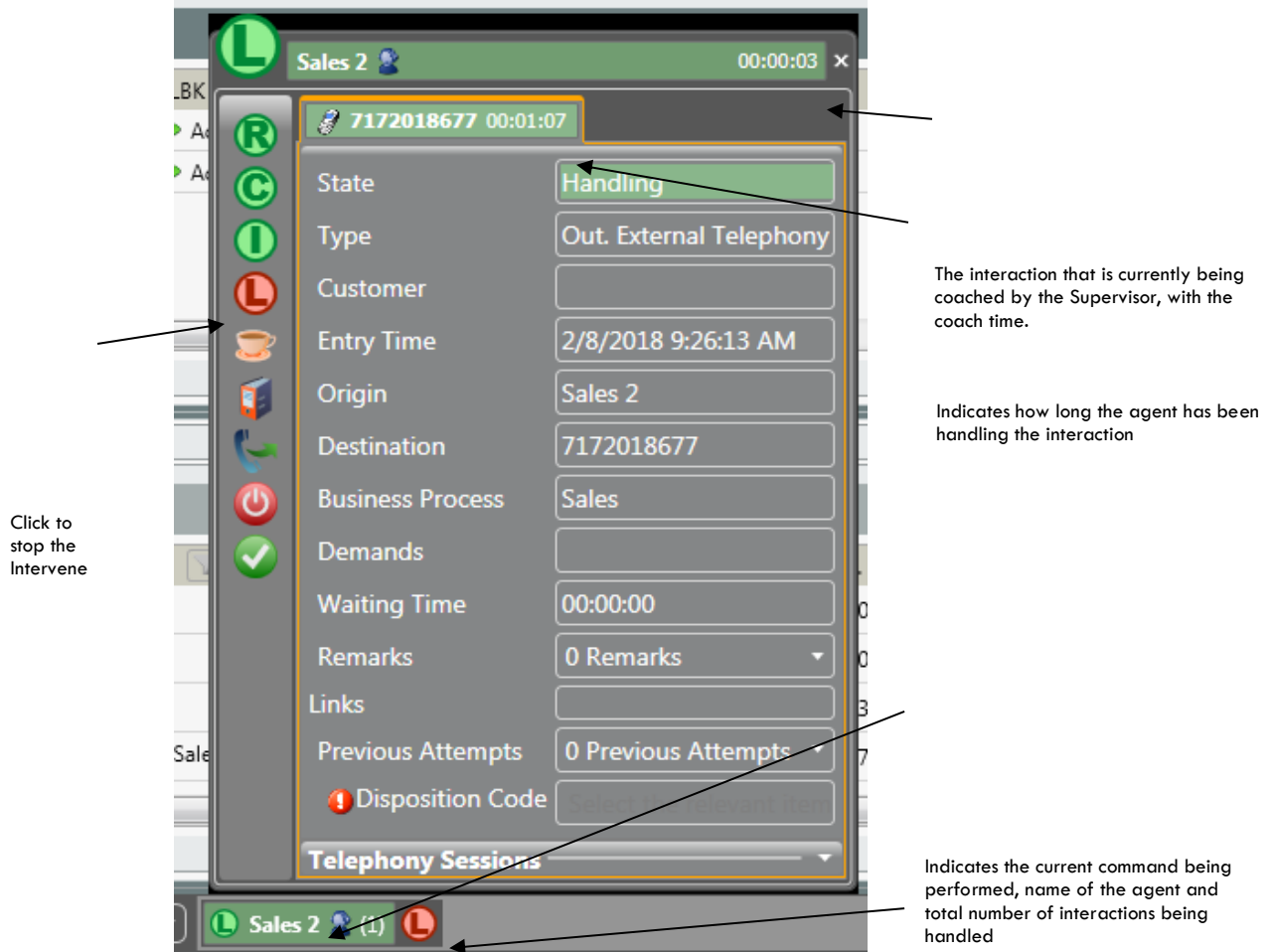





Figure 50: Supervisor Listen Command

3. Click  to stop listening. The Listen command is terminated, and the interaction window disappears from the Supervisor's App Bar.

 Note: If an agent is busy handling more than one interaction, the interaction that appears with a green background (indicating an active voice interaction), while the others appear with a red background.

 Note: If the Supervisor wants to perform other commands on an agent, the system will automatically stop the previous command performed, as soon as the new command is activated.

3.7.4 Retrieve

The retrieve command is used ('Retrieve' button ) in cases where the supervisor is performing either a coach, listen or intervene and another interaction (voice, chat or mail) is

received while performing one of the commands. After accepting the new interaction, the supervisor's interaction panel is put on hold. In order to get it back, the 'Retrieve' button must be used.

Scenario:

The supervisor is performing a 'Listen' on agent John

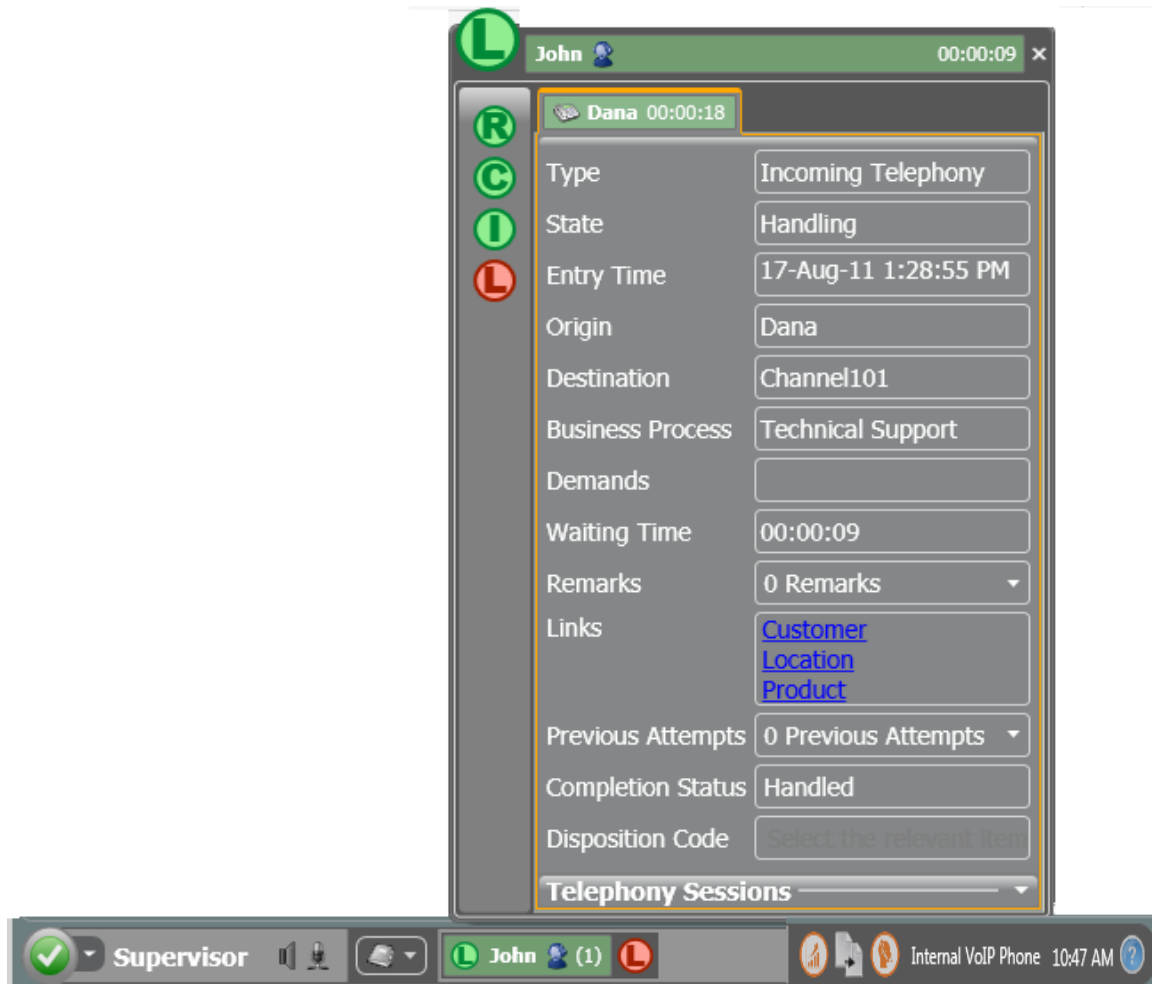


Figure 51: Listen Command in Progress (a)

While the supervisor listens to the agent's conversation, another agent: Jane, calls the supervisor.

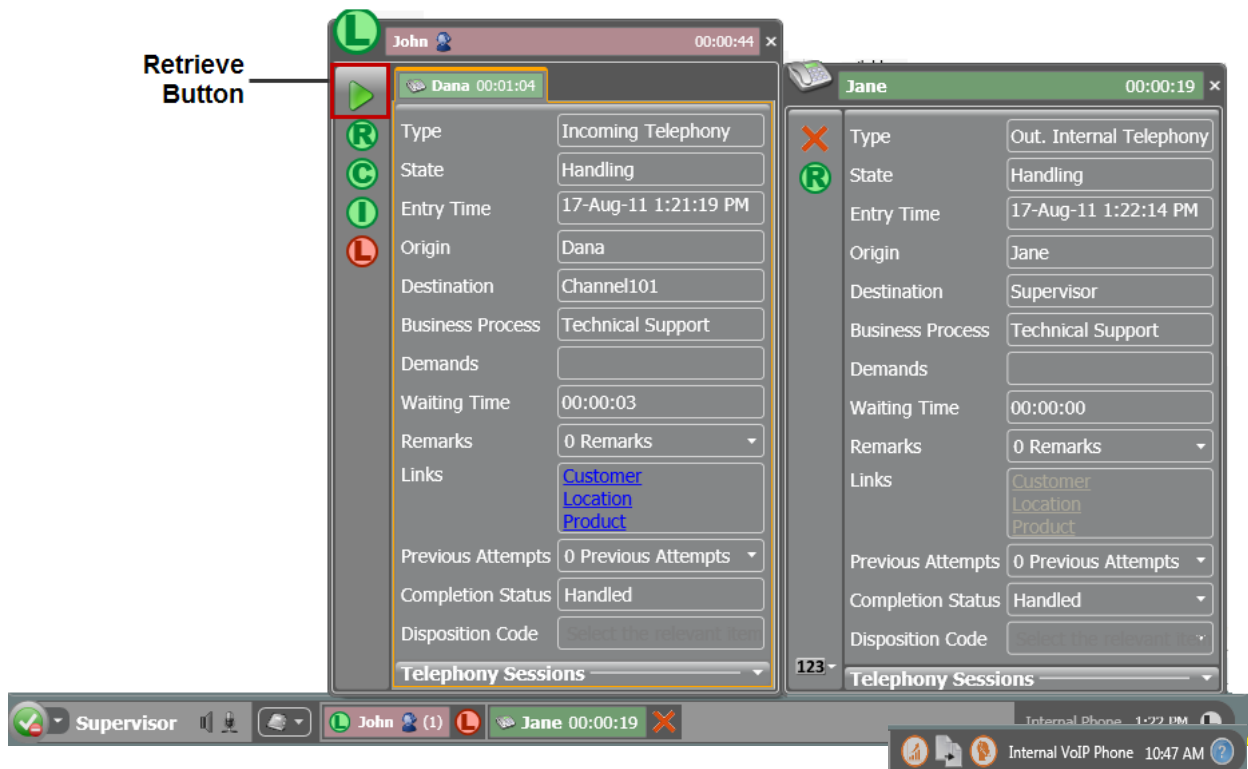


Figure 52: Listen Command in Progress (b)

The supervisor accepts Jane's call and the Listen interaction with Agent John is put on hold (the current interaction being listened to has a pink background) and the supervisor can no longer hear the interaction with Agent John. The new active interaction with Jane is indicated by a green background.

The supervisor presses the 'Retrieve' button  to retrieve the original Listen interaction with agent John. The active interaction panel with agent John now has a green background and the interaction from agent Jane is now on hold indicated by a pink background.

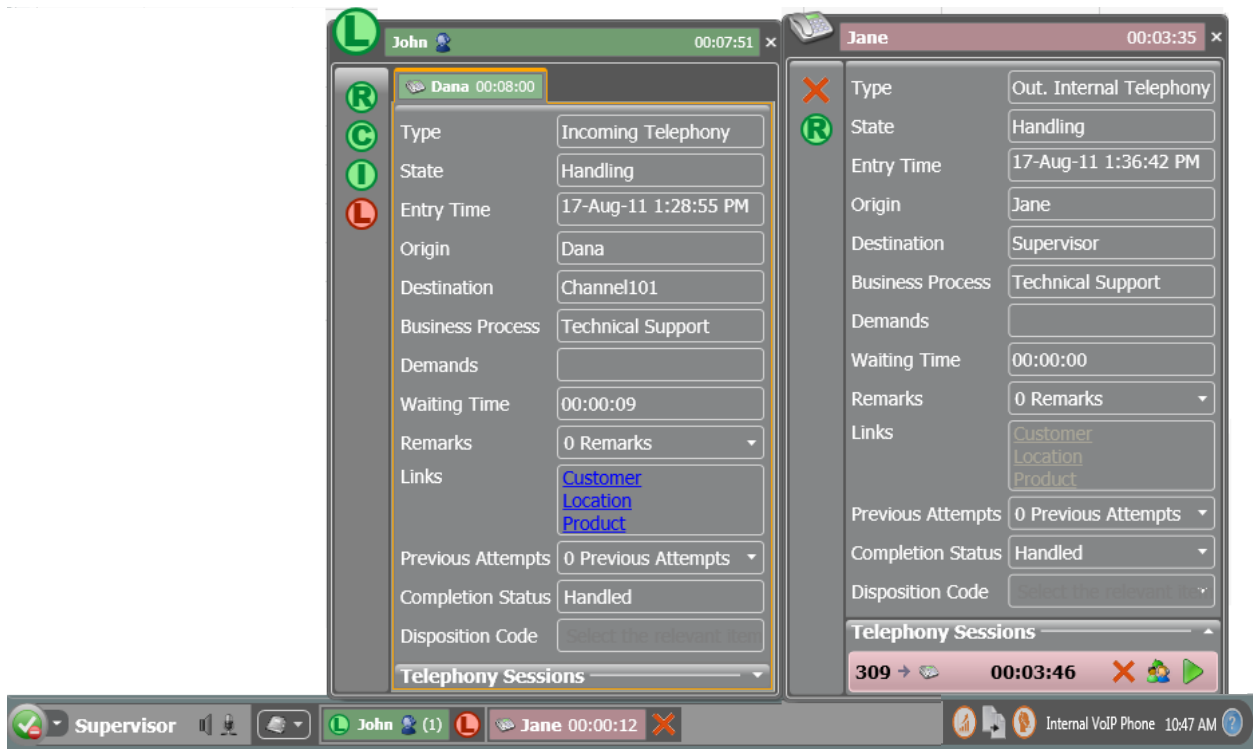

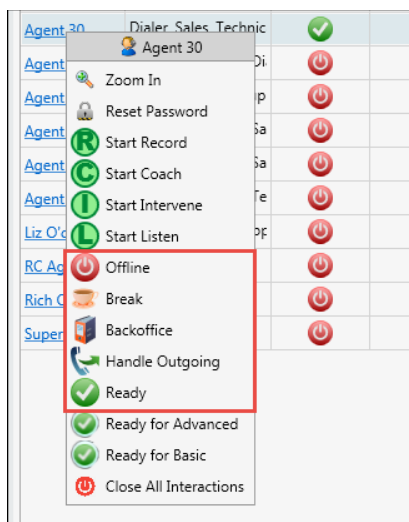


Figure 53: Listen Command in Progress (c)

To retrieve the interaction with agent Jane and place the interaction between agents John on hold again, the Supervisor clicks the Retrieve' button  in the interaction session panel with Jane.

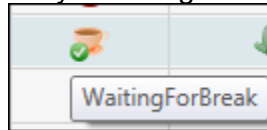
3.7.5 Change Agent State

Supervisors can change the agents state to Ready, Backoffice, Break, Handling Outgoing and Offline. If agents have unique break types configured, the supervisor will be able to select the specific break type to change the agents state.



Right click on the agents name and select the new agent state.

If the agent is currently handling an interaction, the agent state will change to



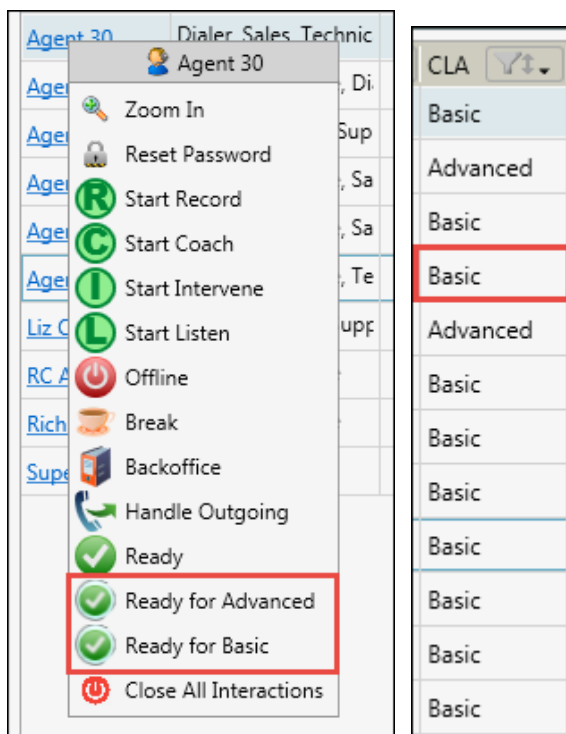
“Waiting For (X)” Once they complete the interaction the system will force them into the supervisor selected state.

3.7.6 Change Agent Load Allowance

Supervisors can change the agents current Load Allowance.

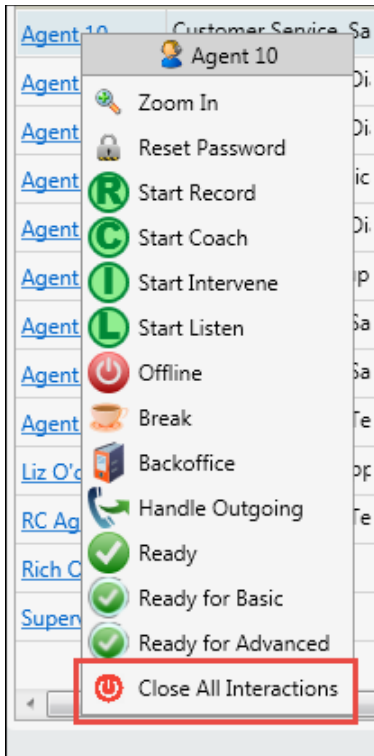
Right click on the agents name to bring up a list of all available load allowances assigned to the agent.

In the example below, the agent is currently assigned two load allowances, Basic and Advanced. By looking at the CLA (Current Load Allowance) column the supervisor can see what load allowance is currently assigned to the agent, before changing the agents load allowance.



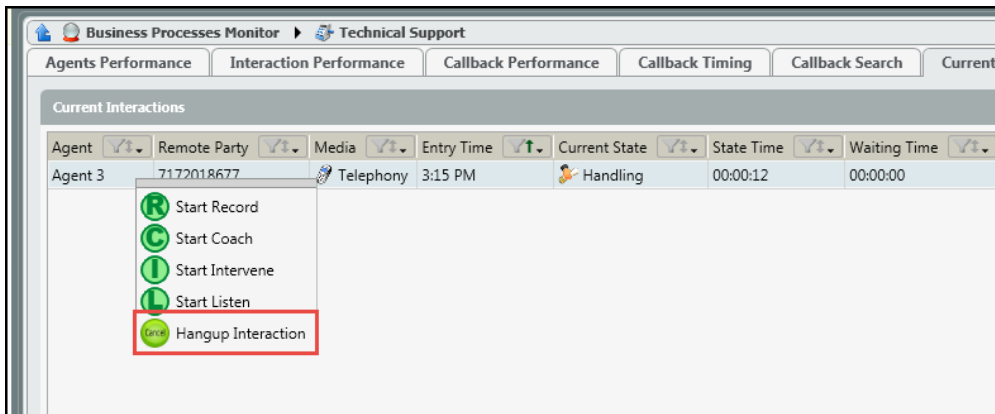
3.7.7 Close All Interactions

When selected, this action will terminate all interactions currently being handled by the Agent. This command should only be used in the rare cases where an Agent is encountering an issue and Evolve IP Support recommends this as a resolution step. The system will automatically add a Remark (visible in reports) to the interaction stating it was disconnected by the Supervisor. That Remark states “Supervisor via Current Interactions command: Interaction was hang up by Supervisor”.



3.7.8 Hangup Interaction

Hangup Interaction is located on the Current Interactions tab within a Business Process and available for Telephony interactions only. When selected, this action will terminate the active call. The system will automatically add a Remark (visible in reports) to the interaction stating it was disconnected by the Supervisor. That Remark states “Supervisor via Current Interactions command: Interaction was hang up by Supervisor”.



3.8 Assign Agents to Business Process

Supervisors have the ability to assign agents to Business Processes. The assignment is for a set period of time (a few hours, a day, week etc.). Once the period of time has ended the agent will be automatically removed from the Business Process assignment.

Note * Agents can be permanently assigned to a Business Process through the Setup application.

1. Select the Assign Agents icon from the bottom of the Supervisor Client

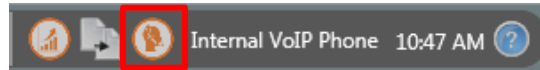


Figure 54: Agent Business Process (BP) Assignment icon

2. Within the Agent Assignment Popup window select a Business Process. Once selected, the agents currently active and inactive within the BP will appear.

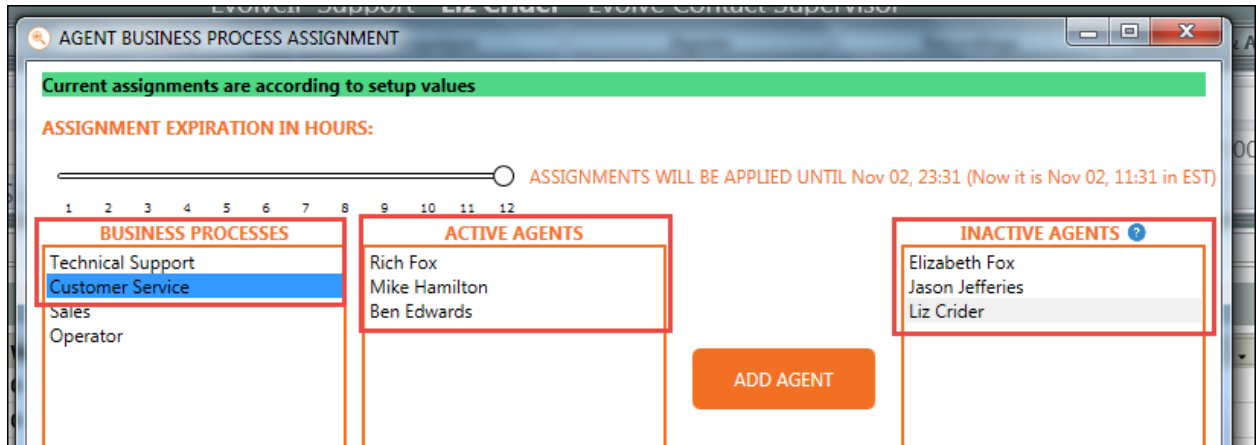


Figure 55: Agent BP Assignment Screen

3. Assignment Expiration Hours allows you to select the total number of hours you wish the selected agents to be assigned and active within the Business Process.

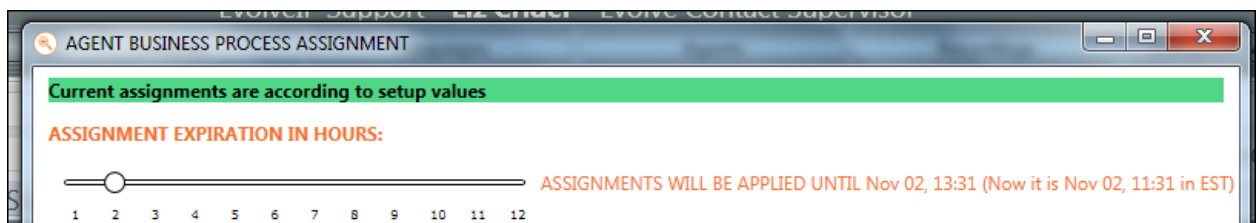


Figure 56: Agent BP Assignment Expiration

Example:

If you wish for your agents to be active within a BP for 2 hours, select 2. Once you have added agents and saved your changes, the agents will be active and able to handle any interaction within the selected BP for two hours. Once that duration has expired, they will be moved back into an inactive status and will no longer receive interactions from the selected Business Process.

1. Select the Agents to be added to the Business Process.
2. Set the correct Assignment Expiration in Hours.
3. Select Add Agents.

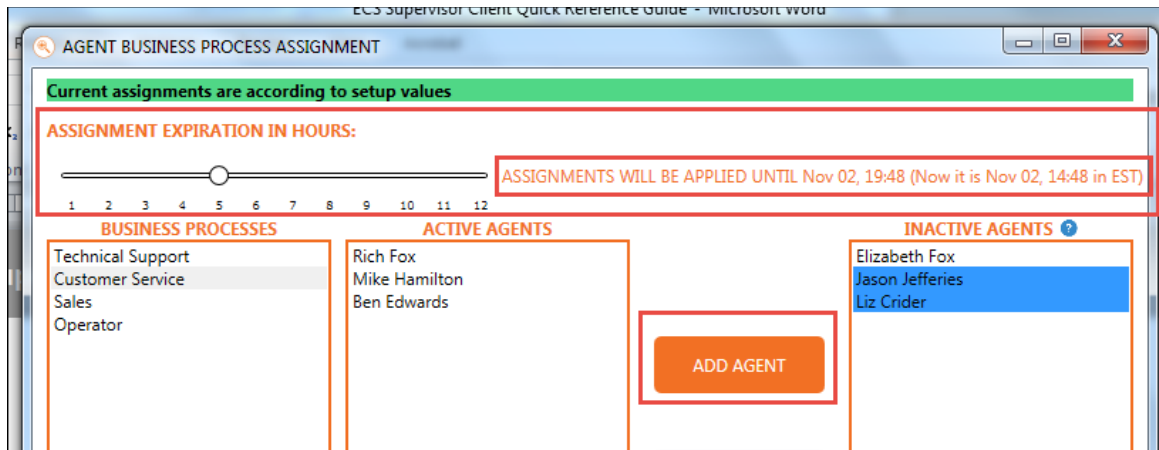


Figure 57: Agent BP Assignment Screen

- Once the agents have been added, select Save Changes.

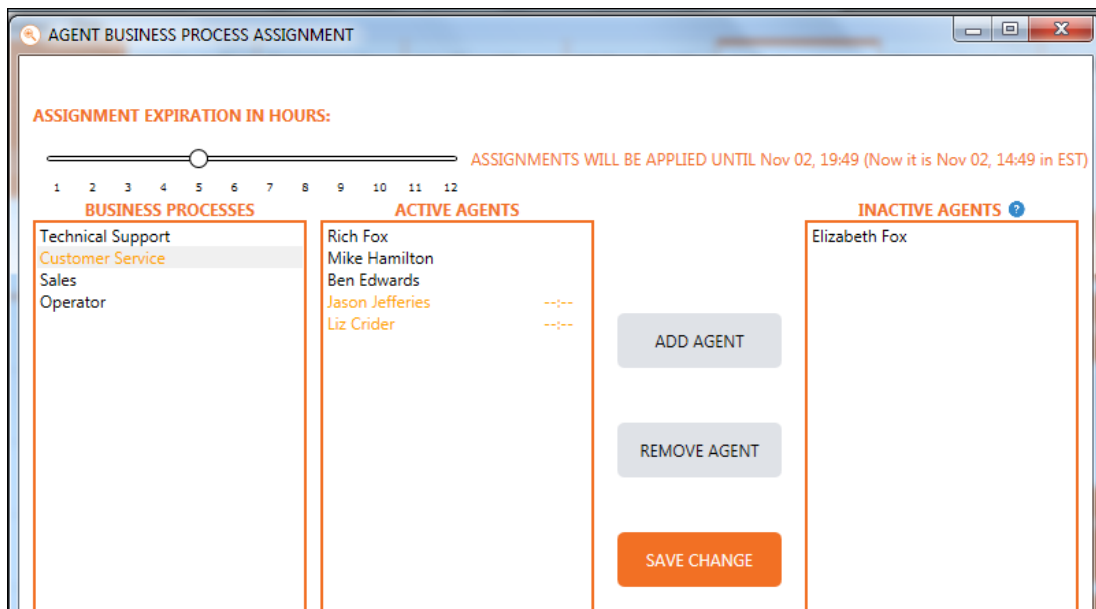


Figure 58: Agent BP Assignment Screen

- When the changes have been saved, you will see the time in which the agents will be moved from Active to Inactive within the queue, based on the expiration hours set.

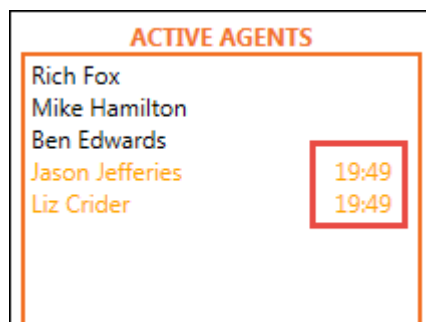
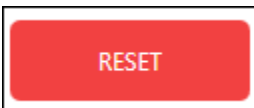


Figure 59: Active Agent BP

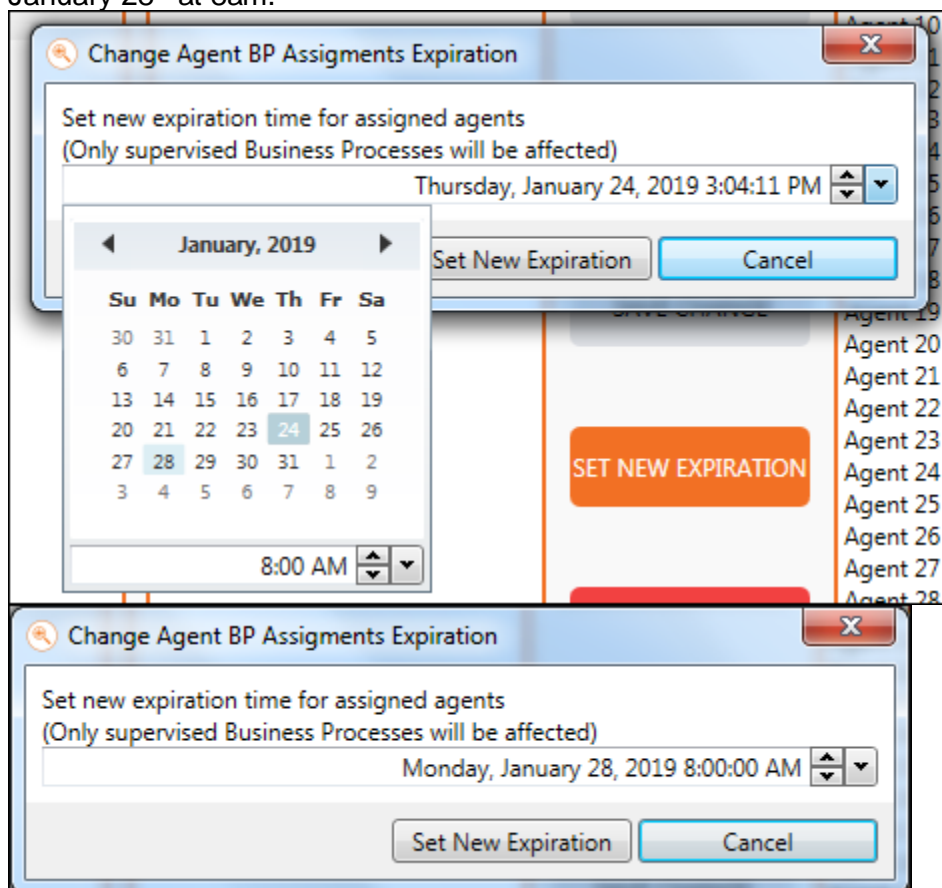


6. To reset the agents, select **Reset**
7. To set a new expiration by the Hour, Day, Week, or Month, select **Set New**



Expiration

8. Select the day and time of the new expiration. In this example, the change is being made on January 24th and the agent expiration is being set for Monday, January 28th at 8am.



9. Select Set New Expiration.
10. The Agent time will reflect the new expiration set.

4 Working with Index views

The Supervisor Client provides a number of Indexes that appear in the Work Area. Some Indexes may display warnings or alerts, depending on whether or not alerts are currently activated within the Setup Portal.

Indexes are available via the Dashboard and can be used to assess agent and BP performance. The dashboard has the following index buttons:

- Business Processes
- Campaigns
- Agents
- Deleted and Abandoned
- Contacts
- DNC






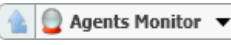


Figure 16: Dashboard Index Buttons

4.1 Agent Index

Within the Agent Index window, information about each agent's status and activity is shown.

To access the Agent Work Area and drill down on a specific agent, the following actions can be taken:

1. Click the  index. You will see a list of all agents in the Work Area sorted alphabetically. These agents are all agents you are currently supervising.
2. Click the Agents hyperlink  to drill down on the specific Agent –
OR
3. Right-click the relevant Agents hyperlink and select  Zoom In from the pop-up menu.
OR
4. Mouse-over . The arrow changes to .
5. Click  and a list of all the existing agents appear in a pop-up menu for you to choose from.

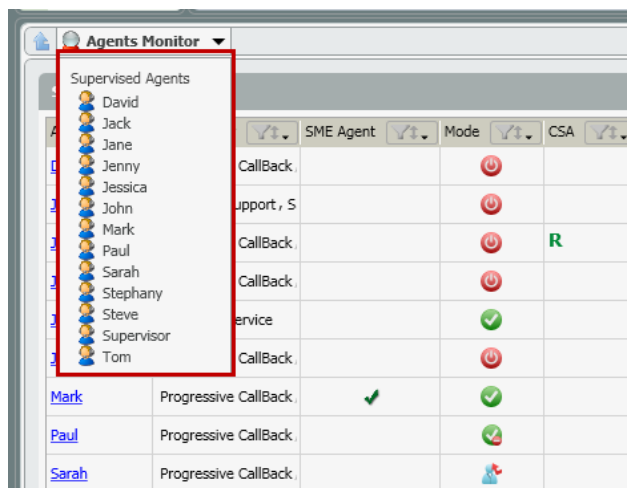


Figure 60: Pop-Up Menu with Existing Agents

The table below lists the Agent fields available in the monitor view.

Table 1: Agent Fields

Field	Description
Agent Name	The agent's name
Assigned Business Process	The list of Business Processes the agent is assigned to handle. BP names that are marked in red means that the agent is assigned to the BP but is not joined to take calls. currently activated.
Agent Type	Displays whether the agent is an SME, Regular agent or Office agent.
State	Displays the current agent state such as: Offline, Ready, Busy, Break, Back Office - Administrative, Handling Outgoing Interactions, No Answer
Remote Party	The Contact Information of the Remote Party
Interaction State	The current interaction state (e.g handling, wrap up, on hold, new outgoing interaction, etc)
Active BP	The Business Process that is associated with the interaction.
Current Supervision Activities	Displays the Supervisor's current commands (e.g. R – Recording, C – Coach, I – Intervene and L – Listen).
Current Load Allowance (CLA)	The agent's current Load Allowance.
Elapsed State Time	The time elapsed since agent's current state started (or last state change).
Availability	The agent's current status: Offline, Available, Busy, Unavailable.
Currently Handling	The number of interactions currently being handled by the agent. This includes all interaction types.
Business Process Handled	Total number of BP interactions, including consult and conference, the agent answered, accepted, or initiated.. It includes callback, campaign, incoming, outgoing external and outgoing internal BP interactions, excluding incoming or outgoing "private interactions".

Field	Description
Total Missed	Total number of interactions the agent failed to answer on-time (did not answer).
Business Process Rejected	Total number of interactions originated by BP the agent rejected. This number excludes private rejected interactions.
Last Login Time	Agent's last login entry time stamp.
Current Handle Time	The handling time for BP-originated interactions currently being handled by the agent. An interaction handling time is calculated from the time an agent answered until the time it was concluded.
Average Handling Time	The average handling time for BP-originated interactions handled by the agent. An interactions duration is calculated from the time an agent answered until the time it was concluded. This field includes incoming and outgoing interactions both internal and external, excluding private, consult, and conference interactions.
Total Incoming Interactions	Total number of interactions the agent answered/accepted. It includes incoming BP interactions both internal and external, excluding incoming or outgoing private interactions.
Total Callbacks Requested	Total interactions the agent marked as callback/re-schedule. It does not include private interactions.
Login Time	The elapsed time an agent was logged in, i.e. from the time an agent logged in (shift started) to the time the agent logged off (shift ended). The counter is reset when an agent logs out.
Current Time in Wrap Up	The agent's current time in Wrap Up.
Total Busy Time	The total amount of time an agent spent in Busy state.
Total No Answer	The total amount of time an agent did not answer pending interactions while logged in.
Total Handling Outgoing Time	The accumulated time an agent spent in Handling Outgoing Interactions state.
Total Break Time	The accumulated time the agent spent in Break state.
Current Time in Break	The time the agent is currently spending in a Break state.
Current Break Name	The agent's current Break type.
Time to Expiration of Break	The time left for an agent to finish their Break (if the system is configured with a specific Break time).
Current Busy Time	The time the agent is currently spending in a Busy state.
Current Ready Time	The time the agent is currently spending in the Ready state.
Current Handling Outgoing Time	The time the agent is currently spending in the Handling Outgoing state.
Current Back Office Time	The time the agent is currently spending in the Back Office state.
Total Not Ready Time	The accumulated time the agent spent in the Not Ready state, calculated as Login time minus Ready time.
Total Handling Time	The overall handling time plus wrap up time for all interactions handled by the agent.

Field	Description
Total Back Office Time	The accumulated time the agent spent in a Back Office state.
Total Ready Time	The accumulated time the agent was in Ready state.
Total Wrap Up Time	The total amount of time the agent was in Wrap state.
Total Incoming Private	The total number of private interactions the agent participated in. It can also be an internal interaction between Agents (not through a BP) while on a break.
Total Transfer	The total number of interactions the agent transferred (using both attended and blind transfer) to any internal or external destination.
Total Consult or Conference Initiated	The total number of consult or conference interactions initiated by the agent.
Total Answered as Consult Total Consult or Conference Initiated	The total number of times the agent answered and participated in consult or conference interactions'. Note that several consultations / conferencing segments are applicable to a single interaction.
Total Outgoing External	The total number of interactions the agent initiated to external addresses out of the contact center.
Total Outgoing Internal	The total number of interactions that an agent initiated to a BP (in the organization).
Total Outgoing Private	The total number of private interactions that the agent initiated. Private interactions include: When an agent/supervisor initiated an external interaction while on a break. It can also be an internal interaction between Agents (not through a BP) while on a break.
Average Ring Time	Average ring time for interactions
Total Dialing Time	The accumulated dialing time of an agent.
Total Unsuccessful Dialing Time	The accumulated time from the time the agent initiated an outgoing interaction (BP external or internal) until ended unsuccessfully or canceled by the agent.
Total Unsuccessful Dialing Attempts	The total attempts that the agent initiated (BP external or internal) an outgoing interaction until ended unsuccessfully or canceled by the agent.
Busy to Login Time Ratio	The ratio between agents 'Total Busy Time' to agents 'Total Login Time' since the agents shift started. Calculated every 60 seconds.


Agent	Assigned BP	State	Remote Party	Int. State	Active BP	CLA	Elps. St. Tm.	Availability	Miss.	BP Rej.	Lst. Login Tm.	Cur. Handl. Tm.
Agent 10	Customer Service, Sa		7172018677	Handling	Technical Support	Basic	00:04:43	Busy	0	0	1:45 PM	00:04:43
Agent 2	Customer Service, Di					Advanced	00:00:19	Available	0	0	1:59 PM	00:00:00
Agent 3	Customer Service, Di		4847077071	Handling	Technical Support	Basic	00:00:29	Busy	0	0	2:00 PM	00:00:29
Agent 30	Dialer, Sales, Technic					Basic	00:00:21	Available	0	0	1:59 PM	00:00:00
Agent 4	Customer Service, Di					Advanced	00:00:00	Offline	0	0		00:00:00

Figure 61: Agent Index View in Work Area

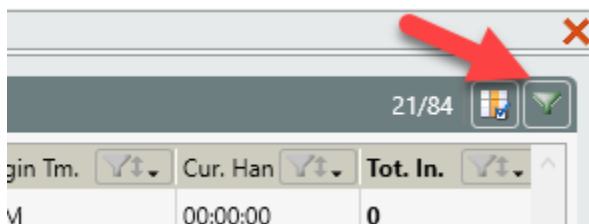
The following tabs are available when drilling-down on an Agent:

- Definitions
- Agents Performance
- Interactions Performance
- Current Interactions

Supervisors can drill down on each of their Agents to get more specific performance and interaction details.

Using the Last Login Filter 

The Last Login Filter will hide Agents that haven't logged into ECS in the past 72 hours. Use the Filter icon to activate or deactivate this filter.



NOTES:

1. For Supervisors that manage many Agents, this filter may automatically activate when the Agent Monitor loads.
2. This filter is based upon the Last Login Time stored in ECS. When ECS services are restarted by an Administrator or by the release of a new version of ECS, this value is reset.

4.1.1 Definitions Tab

This tab provides Supervisors with agent parameters and settings.

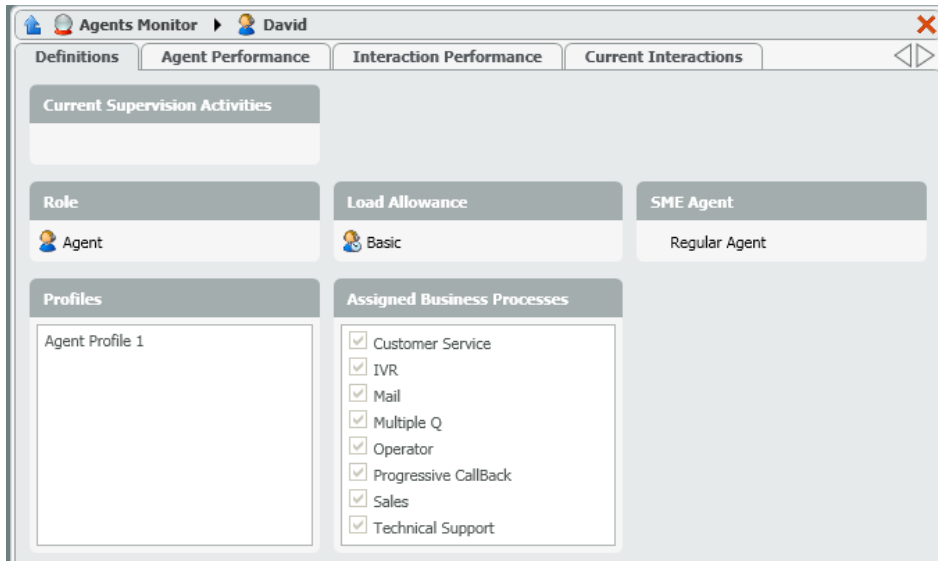


Figure 62: Agent Monitor View – Definitions Tab

The table below lists all the fields found in the Definitions Tab.

Table 2: Agent Definitions Fields

Field	Description
Current Supervision Activities	Displays the actions a supervisor is presently performing on an agent (e.g. Record, Coach, Intervene and Listen).
Role	The agent’s role in the system.
Load Allowance	The agent’s predefined load allowance (i.e. how many and which type of interactions can this agent handle simultaneously).
Agent Type	Displays whether the agent is an SME (accessed via an external DID), Regular agent (No Answer state doesn’t expire; the agent must manually change their state) or Office agent (No Answer state can be configured to expire).
Profiles	The agent’s profile type. (e.g. language, skill or product capabilities)
Assigned Business Processes	The Business Processes assigned to the agent

4.1.2 Agent Performance Tab

This tab provides Supervisors with details on an agent’s performance.

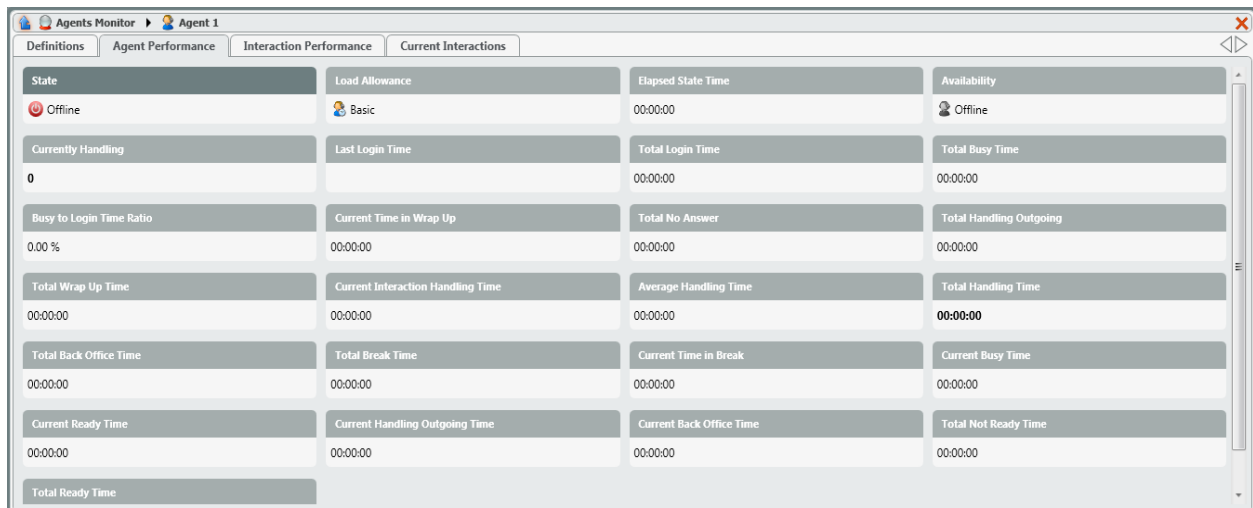


Figure 63: Agents Monitor View – Agent Performance Tab

The table below lists all the fields found in the Agent Performance Tab.

Table 3: Agent Monitor View - Performance Fields

Field	Description
State	The agent's current state e.g. Ready, Back Office, Handling Outgoing, Offline, etc)
Load Allowance	The agent's current Load Allowance
Elapsed State Time	The time that has elapsed since the agent's state first started.
Availablility	The agent's current login status e.g. offline, available, unavailable or busy.
Currently Handling	The number of interactions the agent is currently handling (includes all interaction types)
Last Login Time	The time the agent last logged into the system
Total Login Time	The total time an agent has been logged in from the initial login. This counter is reset every time an agent logs out (i.e. ends a shift).
Total Busy Time	The total amount of time an agent was in a 'Busy' state handling an interaction(s)
Busy to Login Time Ratio	The ratio between agents 'Total Busy Time' to agents 'Total Login Time'. This field is recalculated every 60 seconds.
Current Time in Wrap Up	Current time in Wrap Up
Total No Answer	The total amount of time an agent did not answer pending interactions while being logged on
Total Handling Outgoing	The accumulated time the agent spent in 'Handling Outgoing Interactions' state.
Total Wrap Up Time	The total amount of time an agent spent wrapping up interactions
Current Interactions Handling Time	The handling time for BP originated interactions currently being handled by the agent. An interaction's handling time is

Field	Description
	calculated from the time an agent answered until the time it was disconnected.
Average Handling Time	The average handling time for Business Process originated interactions handled by the agent (includes both internal and external outgoing and incoming interactions, while private, consult and conference interactions are excluded). An interactions duration is calculated from the time an agent answered until the time it was disconnected.
Total Handling Time	The total handling time (handling time plus wrap up time) for all interactions handled by the agent.
Total Back Office Time	The accumulated time an agent spent in 'Back Office' state.
Total Break Time	The accumulated time an agent spent in 'Break' state,
Current Time in Break	The time the agent is currently spending in a Break state
Current Busy Time	The time the agent is currently spending in a Busy state
Current Ready Time	The time the agent is currently spending in the Ready state
Current Handling Outgoing	The time the agent is currently spending in the Handling Outgoing state
Current Back Office Time	The time the agent is currently spending in the Back Office state
Total Not Ready Time	The accumulated time the agent spent in the 'Not Ready' state, calculated as Login time minus Ready Time
Total Ready Time	The accumulated time an agent spent in the 'Ready' state.

4.1.3 Interactions Performance Tab

This tab provides Supervisors with details on an agent's performance.

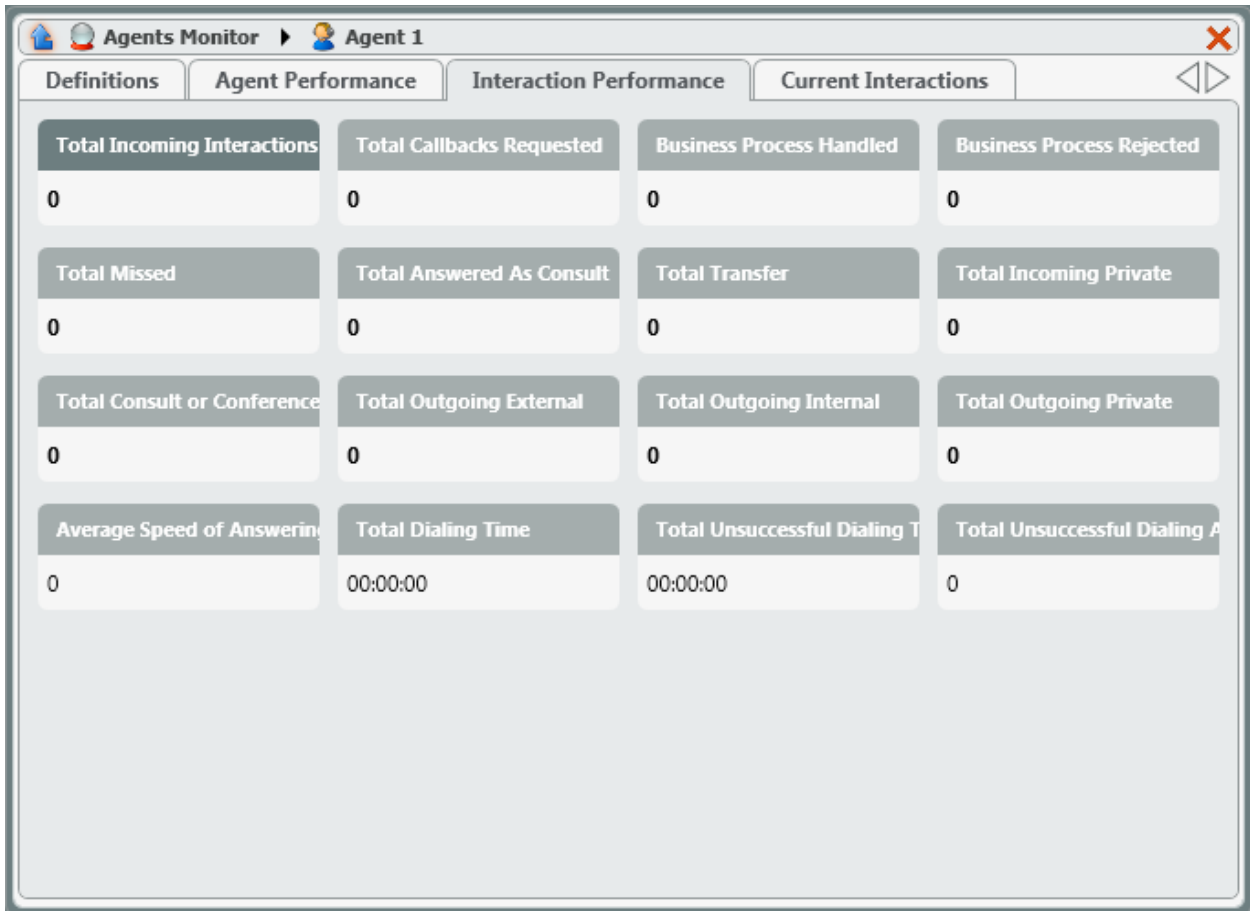


Figure 64: Agent Monitor View – Interactions Performance Tab

The table below lists all the fields found in the Interactions Performance Tab.

Table 4: Agent Monitor View - Performance Fields

Field	Description
Total Incoming Interactions	Total incoming interactions the agent accepted/answered during the agent's shift. It includes incoming BP interactions both internal and external excluding incoming or outgoing private interactions.
Total Callbacks Requested	Total interactions the agent marked as a callback/re-schedule during shift. It does not include private interactions.
Business Process Handled	Total number of BP interactions, including consult and conference, the agent answered, accepted or initiated. It includes callback, campaign, incoming, outgoing external and outgoing internal BP interactions, excluding incoming or outgoing private interactions.
Business Process Rejected	The total number of interactions originating from a Business Process, which were rejected by an agent.
Total Missed	The total number of interactions the agent did not answer.
Total Answered As Consult	The total number of times the agent answered and participated in consult or conference interactions. Note: several consultations/conferencing segments are applicable to a single interaction.
Total Transfer	The total number of interactions the agent transferred (using both attended and blind transfer) to any internal or external destination.
Total Incoming Private	The total number of private interactions the agent participated in.
Total Consult or Conference initiated	The total number of times an agent initiated consult or conference interactions.
Total Outgoing External	The total number of interactions the agent initiated to external addresses, outside of the contact center.
Total Outgoing Internal	The total number of interactions that an agent initiated to a BP (in the organization).
Total Outgoing Private	The total number of private interactions the agent initiated.
Average Speed of Answer	Average speed of answering interactions by an agent for all their assigned interactions.
Total Dialing Time	The accumulated dialing time.
Total Unsuccessful Dialing Time	The accumulated time from the time the agent initiated an outgoing interaction (BP external or internal) until ended unsuccessfully or canceled by the agent.
Total Unsuccessful Dialing Attempts	The total attempts that the agent initiated (BP external or internal) an outgoing interaction until ended unsuccessfully or canceled by the agent.

4.1.4 Current Interactions Tab

This tab provides details on an agent’s current interactions.

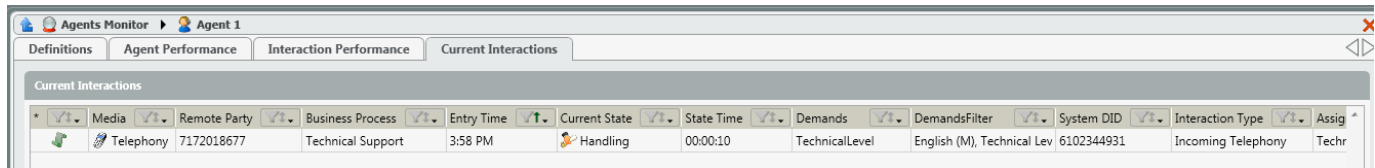


Figure 65: Agent Monitor View – Current Interactions Tab

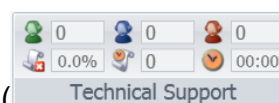
The table below lists all the fields found in the Current Interactions Tab.

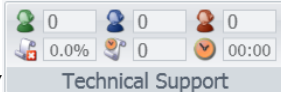
Table 5: Agent Interactions Current Interactions Fields

Field	Description
Media	The media type, indicated by the relevant icon (e.g.).
Remote Party	Who the agent is currently interacting with. If media type is email, then the email address of the person the agent is corresponding with appears, if the media type is telephony, then the customer’s phone number is displayed.
Business Process	The Business Process that is associated with the interaction.
Entry Time	The time or date (if the interaction did not enter today) in which the interaction entered the contact center.
Current State	The current interaction state (e.g. handling, wrap up, new outgoing interaction, etc.).
State Time	Indicates how long the interaction has been in the current state.
Demands	Demands (skills) assigned to the Interaction
Demands Filter	Current Demand Filter assigned to the interaction - this is a dynamic value and will update depending on how long the interaction waited in queue
System DID	The telephone number the customer dialed to interact with the agent or the system endpoint (extension) reached.
Interaction Type	The interaction type (i.e. incoming telephony, transferred telephony, incoming chat, incoming email, etc.).
Assigned To	Agent/Team which the interaction is assigned to. If none exists the current Business Process is shown.
Customer ID	Customer ID.
Interaction ID	An internal number that is automatically assigned by the system.
Flow Version	Version of the flow.

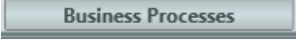
4.2 Business Process Index

The Business Process Index shows information on all the Business Processes being supervised. Supervisors use the Business Process Index to drill down on each Business Process. To access the Business Process Work Area and drill down on each Business Process, perform either one of the following:



1. Click on the relevant BP dashboard area (). The Work Area displays all the tabs relevant to the specific Business Process selected.




OR

2. Click the  index button. A list of all the available Business Processes will appear in the Work Area.
3. Click the Business Process hyperlink [Technical Support](#) to zoom in on the relevant BP.

OR

4. Right-click the relevant Business Process hyperlink and select 'Zoom In' from the pop-up menu.

OR

5. Mouse-over . The arrow changes to .
6. Click , a list of all the available Business Processes appear in a pop-up menu for to choose from.

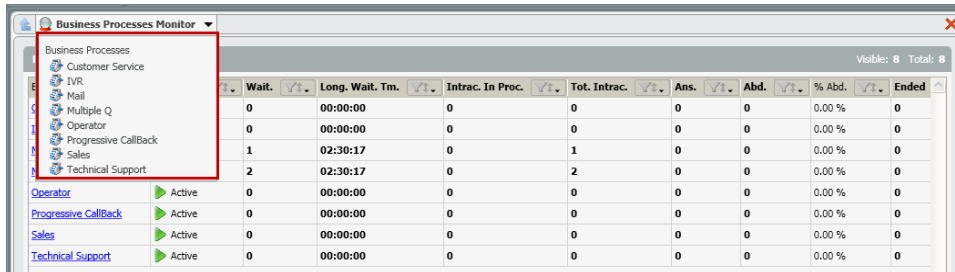


Figure 66: Pop-Up Menu with Existing Business Processes

The table below lists all the fields found in the Business Process Index.

Table 6: Business Process Fields

Field	Description
Business Process Name	The name of the Business Process.
Callback Status	The status of Callback interactions - the following statuses are available: Off Schedule – callback is active, but is not currently scheduled to run (as defined in Callback Timing). Active – callback is running Stopped – callback is inactive
Total Interactions	Total number of interactions, which arrived to the BP.
Waiting Interactions	Total number of interactions (inbound calls and chats only) currently waiting in BP.
Waiting Deferrable Interactions	Total number of deferrable interactions (inbound emails, callbacks, pending outbound campaign calls and faxes) currently waiting in BP.
Longest Waiting Time	The longest waiting time for an interaction (inbound calls and chats only) waiting in BP.
Interactions in Process	Total number of interactions, regardless of media types, currently being processed within the BP.
Total Answered	Total number of interactions answered by agents.
Total Abandoned	Total number of interactions disconnected (abandoned) by customers while in the queue.
% Abandoned	The percentage of abandoned interactions out of the total number of interactions.
Service Level (SL)	The percentage of inbound customer calls that entered the queue and were answered by an agent within the goal specified in the BP's configuration.
Average Speed of Answer (ASA)	Average speed of answer for inbound interactions (inbound calls and chats only) to be answered by an agent.
Interactions Handled in Business Process	Total number of Interactions that ended in the BP flow (but not in the queue), including interaction that were terminated by the system and interactions disconnected by the customer.
Handled by Agent	Total number of interactions answered by the agents and completed.
Total Requested Callback Interactions	Total number of Callback interactions requested.
Total Voicemail	The total number of voicemails that were by callers. Note: this includes voicemails left for specific agents.
Total Overflow	Total number of interactions that triggered an overflow rule in the BP flow (if exists).
Total Transferred Out External	Total number of interactions which were transferred from the BP to an external destination, out of the contact center..
Total Transferred Out Internal	The total number of interactions transferred out of the BP to another BP. It includes Agent to BP and Agent to Channel, (performing a blind or attended transfer).

Field	Description
Average Wait Time	The average waiting time in BP queue.
Average Agent Handling Time	The average agent handling time (includes wrap up time) of all the BP agents.
Average Speed of Answer	The average speed of answer interactions (excludes waiting time for abandoned interactions).
Logged In Agents	The number of agents who are currently logged-in. Offline agents are not considered logged in.
Busy Agents	The number of agents who are currently Busy (includes wrap up time). This includes: Agents that are handling BP interactions as well as wrap up, and agents who are handling BP conference and consult interactions.
Available Agents	The number of agents who are currently Available. This includes: Agents that are in ready state, not busy or agent is handling an internal call.
Unavailable Agents	The total number of agents currently Unavailable.
No Answer Agents	The number of agents who are currently in a No Answer state. This mode is saved for 15 minutes then it moves to logged out.
Agents on Break	The number of agents who are currently in a Break state.
Internal Agents	The number of agents who are currently participating in an Outgoing Internal Interaction. This includes: initiating, receiving or handling an outgoing internal interaction or consult/conference.
Private Agents	The total number of agents who are currently participating in a Private interaction, both initiated and answered.
Handling Outgoing	Total number of agents currently handling outgoing interactions without receiving incoming BP calls in parallel.
Back Office Agents	The number of agents who are currently in a Back Office state.
Consult and Conference Agents	Total number of agents currently engaged in a conference or consult interaction.
Callback Processed in Shift	Total number of Callback records placed to the queue and processed during the current shift, regardless of the outcome (success, fail, or redial).
% of Callbacks Reached in shift	The percentage of customers that received and answered the callback interaction out of the total callback interaction records processed.
% Callback Failed in shift	The percentage of failed callback interactions (maximum attempts reached for no answer, invalid number, busy, etc.) out of the total callback interaction records.
Callbacks to be Processed	The number callback interactions that are waiting to be processed, including records that need to be redialed and records which have not been dialed yet.
Callback Average Handling Time	The average handling time for callback is counted from the time the agent accepted it, until it was disconnected (the average is not calculated per shift).
Callbacks Purged in Shift	The number of interactions that were purged.

Field	Description
Total Interactions Ended Due to DNC request	Interactions that ended because the called party requested the agent add them to the DNC list or they were able to request it through a Call Flow Interaction.
Last Business Process Shift Reset	This counter indicates the last time a Business Process shift was reset (either manually or automatically).

Business Process	CLBK stat.	Tot. Intrac.	Abd.	% Abd.	Ans.	Wait.	CLBK Requested
Customer Service	Active	0	0	0.00 %	0	0	0
IVR	Active	0	0	0.00 %	0	0	0
Mail	Active	0	0	0.00 %	0	0	0
Multiple Q	Active	0	0	0.00 %	0	0	0
Operator	Active	0	0	0.00 %	0	0	0
Progressive CallBack	Active	0	0	0.00 %	0	0	0
Sales	Active	0	0	0.00 %	0	0	0
Technical Support	Active	0	0	0.00 %	0	0	0

Figure 67: Business Process Index in Work Area

The following tabs are available when drilling-down on a Business Process:

- Agents Performance
- Interaction Performance
- Callback Performance
- Callback Timing
- Callback Search
- Current Interactions

Drill down on each Business Process to get more specific performance and interaction details.

4.2.1 Agents Performance Tab

The Agents Performance tab provides statistical data on the performance of all agents within the Business Process.

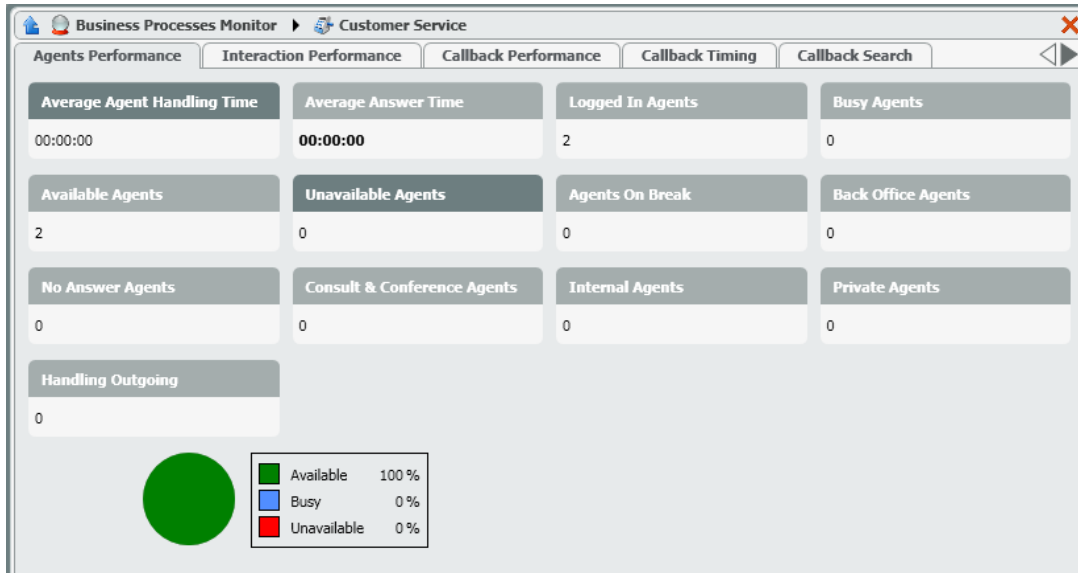


Figure 68: Agents Performance Tab

The table below details the fields that can be found in the Agents Performance tab.

Table 7: Agents Performance Fields

Field	Description
Average Agent Handling Time	The average agent handling time (includes wrap up time) of all the BP agents..
Average Speed of Answer	The average speed of answer for answered interactions (excludes waiting time for abandoned interactions) .
Logged In Agents	The number of agents who are currently logged-in (offline agents are not considered logged in).
Busy Agents	The number of agents who are currently Busy (includes wrap up time). This includes: Agents that are handling BP interactions as well as wrap up, and agents who are handling BP conference and consult interactions.
Available Agents	The number of agents who are currently Available. This includes: Agents that are in ready state, not busy or agent is handling an internal call
Unavailable Agents	Total number of agents currently Unavailable.
Agents on Break	The number of agents who are currently in a Break state.
Backoffice Agents	The number of agents who are currently in Back Office state.
No Answer Agents	The number of agents who are currently in a No Answer state (system assigned state when an agent doesn't answer an interaction).
Consult/Conference Agents	Total number of agents currently engaged in a conference or consult interaction.
Internal Agents	The number of agents who are currently participating in an 'Outgoing Internal' Interaction. This includes: initiating, receiving or handling an outgoing internal interaction or consult/conference.
Private Agents	The total number of agents who are currently participating in a Private interaction, both initiated and answered.
Handling Outgoing	Total number of agents currently handling Outgoing interactions without receiving incoming BP calls in parallel.

4.2.2 Interaction Performance Tab

The Interaction Performance tab enables Supervisors to monitor and view all the interactions that are currently being handled by agents.



Figure 69: Interactions Performance Tab

The table below details the fields that can be found in the Interactions Performance tab.

Table 8: Interactions Performance Fields

Field	Description
Last Business Process Shift Reset	This field indicates the last time a Business Process shift was reset (either manual or automatic).
Total Interactions	Total number of interactions, which arrived to the BP, including all interactions that were answered, abandoned and handled automatically by the BP.
Total Abandoned	Total number of interactions disconnected (abandoned) by customers while in the queue, .
% Abandoned	The percentage of abandoned interactions (inbound calls and chats only) out of the total number of interactions in the current shift.
Total Answered	Total number of interactions answered by agents.
Waiting Interactions	Total number of interactions (inbound calls and chats only) currently waiting in BP queue.
Waiting Deferrable Interactions	Total number of deferrable interactions (inbound emails, inbound faxes, pending outbound campaign calls, and callbacks) currently waiting in BP queue.
Total Requested Callback Interactions	Total number of Callback interactions requested.
Total Voicemails	The total voicemails that were left (including voicemails left for specific agents).
Handled By Agent	The total number of interactions answered by agent and completed..
Interactions Handled In BP	Total number of Interactions that ended in the BP flow (but not in the queue), including interactions that were terminated by the system and interactions disconnected by the customer.
Service Level	The percentage of inbound customer calls that entered the queue and were answered by an agent within the goal specified in the BP's configuration.
Average Speed of Answering (ASA)	Average speed of answer for inbound interactions (inbound calls and chats only) to be answered by an agent.
Interactions In Process	Total number of Interactions, regardless of media type, currently processed by the BP flow.
Total Overflow	Total number of Interactions that triggered an overflow rule in the BP flow (if exists).
Total Transferred Out External	Total number of Interactions which were transferred from the BP to an external destination.
Total Transferred Out Internal	The total number of interactions transferred out of the BP to another BP. It includes Agent to BP and Agent to Channel (performing a blind or attended transfer).
Average Waiting Time	The average waiting time in the BP queue.
Longest Waiting Time	The longest waiting time for an interaction (inbound calls and chats only) waiting in BP.

Field	Description
Total Interactions Ended due to DNC request	Interactions that ended because the customer requested the agent add them to the DNC list or they were able to request it through a Call Flow Interaction.


4.2.3 Callback Performance Tab

A callback request can be placed by customers using the telephone or a web channel, this request includes a number for returning the call, requested calling time and remarks. Each request is scheduled to be treated according to the Business Process flow, customer requested time, and callback campaign rules.

The Callback Performance tab enables Supervisors to get a clear picture of all the Callback interactions (per Business Process) currently taking place within the shift. In the Business Process index, right-clicking a relevant Business Process row provides you with features that will allow you to manage each of the existing callbacks.

4.2.3.1 Callback Logic

1. For scheduled callbacks, the callback is processed when the requested time arrives.
2. For callbacks that originated in the BP's Interaction Handling Flow, the callback will be queued when the following conditions are met:
 - the current day of week & time falls within the BP's callback schedule (the Callback Timing tab of the BP in Supervisor)
 - a valid Interaction Handling Flow exists in the BP that is capable of handling callbacks
 - at least one agent is in a Ready idle or Ready busy status in the assigned BP
 - maximum number of attempts for that callback has not been reached (the Attempts Before Failure on the Callback Timing tab of the BP in Supervisor)
 - these callbacks will be queued and the following will apply based upon the BP's configuration (the Interaction Handling Flow in Setup):
 - Every callback is automatically assigned the "Handle Callback" Demand
 - If the BP's Routing Strategy = Agent Idle Time, the Handle Callback demand is ignored and a Ready agent in the BP will be offered the interaction
 - If the BP's Routing Strategy = Skill Base and the BP's Demand Filters don't include the Handle Callback Skill, the Handle Callback demand is ignored and a Ready agent in the BP will be offered the interaction
 - If the BP's Routing Strategy = Skill Base and the BP's Demand Filters include the Handle Callback Skill, a Ready agent that meets the Queue's Demand Filter requirements will be offered the interaction

	<p>Note: Callbacks need to be enabled in the BP interaction handling flow</p>
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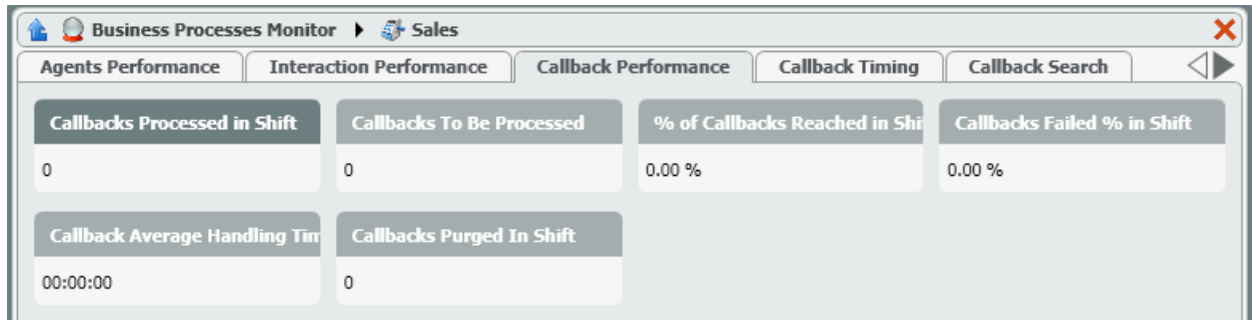
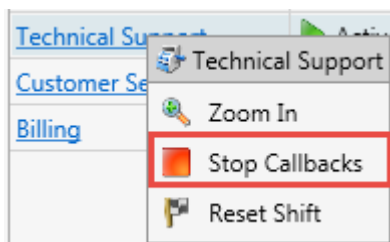


Figure 70: Callback Performance Tab

The table below details the fields that can be found in the Callback Performance tab.

Table 9: Callback Performance Fields

Field	Description
Callbacks Processed in Shift	Total number of Callback records placed to the queue and processed, regardless of the outcome. (success, fail or redial).
Callbacks To Be Processed	The number of callback interactions that are waiting to be processed, including records that need to be redialed and records which have not been dialed yet.
% of Callbacks Reached in Shift	The percentage of customers that received and answered the callback interaction out of the total callback interaction records processed.
% of Callbacks Failed in shift	The percentage of failed callback interactions (maximum attempts reached for no answer, invalid number, busy, etc.) out of the total callback interaction records.
Callback Average Handling Time	The average handling time for callback interactions. This is counted from the time the agent accepted it, until it was disconnected
Callbacks Purged in Shift	The number of interactions that were purged (a logical delete).



Activating a Callback:

Right-click the relevant BP and select  Start Callbacks.

Stopping a Callback:

Right-click the relevant BP and select  Stop Callbacks.

4.2.4 Callback Timing Tab

The Callback Timing tab allows Supervisors to define callback parameters and schedule different callback timeframe rules.

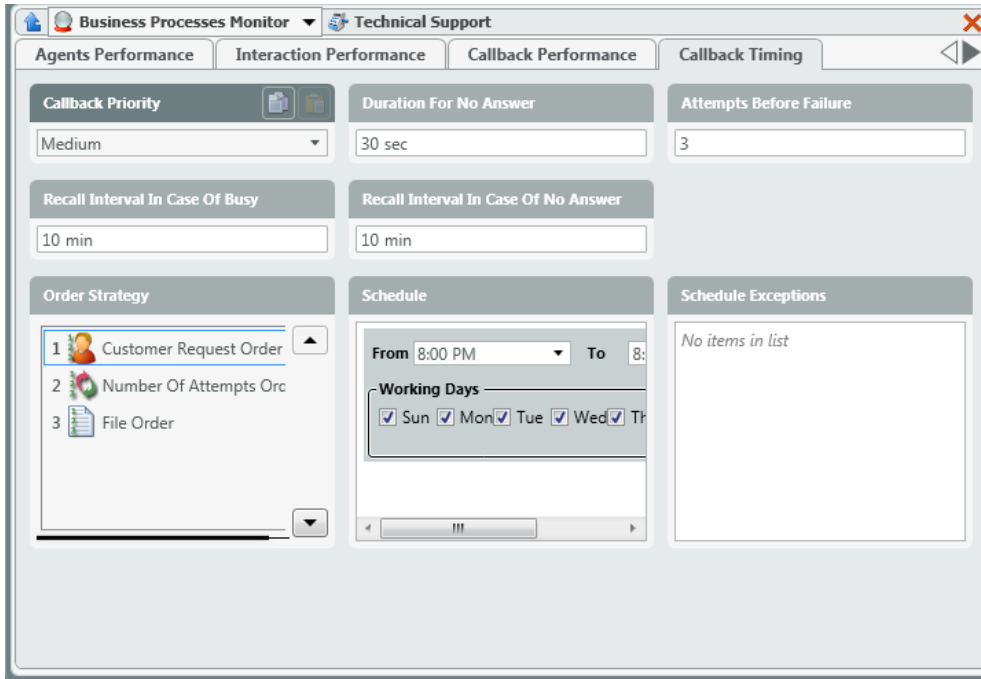


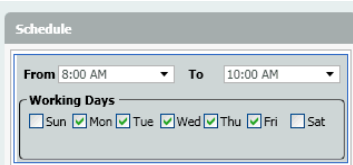
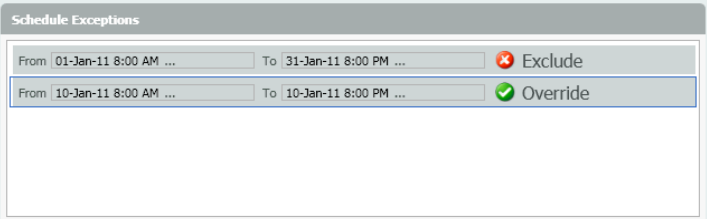




Figure 71: Callback Timing Tab

The table below details the fields that can be found in the Callback Timing tab.

Table 10: Callback Timing Fields

Field	Description
Callback Priority	
Duration For No Answer	This field determines how long (in seconds) the customer's phone should ring before the Callback is ended with the reason of "No Answer".
Attempts Before Failure	This field determines the number of outbound attempts the system will make before the Callback is no longer attempted with a reason of "Maximum Attempts Reached".
Recall Interval In Case Of Busy	The amount of time the system will wait before redialing a Callback after the customer's line was busy during an attempt.
Recall Interval In Case Of No Answer	The amount of time the system will wait before redialing a Callback after the customer didn't answer during an attempt.
Schedule	<p>Define when callbacks will take place by scheduling the days of the week and the times the callbacks will take place using the BP time zone.</p> <p>Click  to create a new Schedule panel.</p> <p>Click  to delete a Schedule panel.</p> 
Schedule Exceptions	<p>Define exceptions to the daily schedules.</p> <p>Use the schedule exceptions panel to define when callbacks are NOT to take place, and when callbacks ARE to take place despite what was entered in the regular schedule panel.</p> <p>Exclude: Even if the regular schedule has been defined with a specific date and time, the callback will not be activated.</p> <p>Override: Even if the regular schedule does not have the specified date and time, the callback will still run.</p>  <p>Click  to create a new Schedule Exception.</p> <p>Click  to delete a Schedule Exception.</p>

4.2.5 Callback Search Tab

The Callback Search tab allows Supervisors to search for callbacks that have been performed. You may enter various criteria to get more accurate search results.

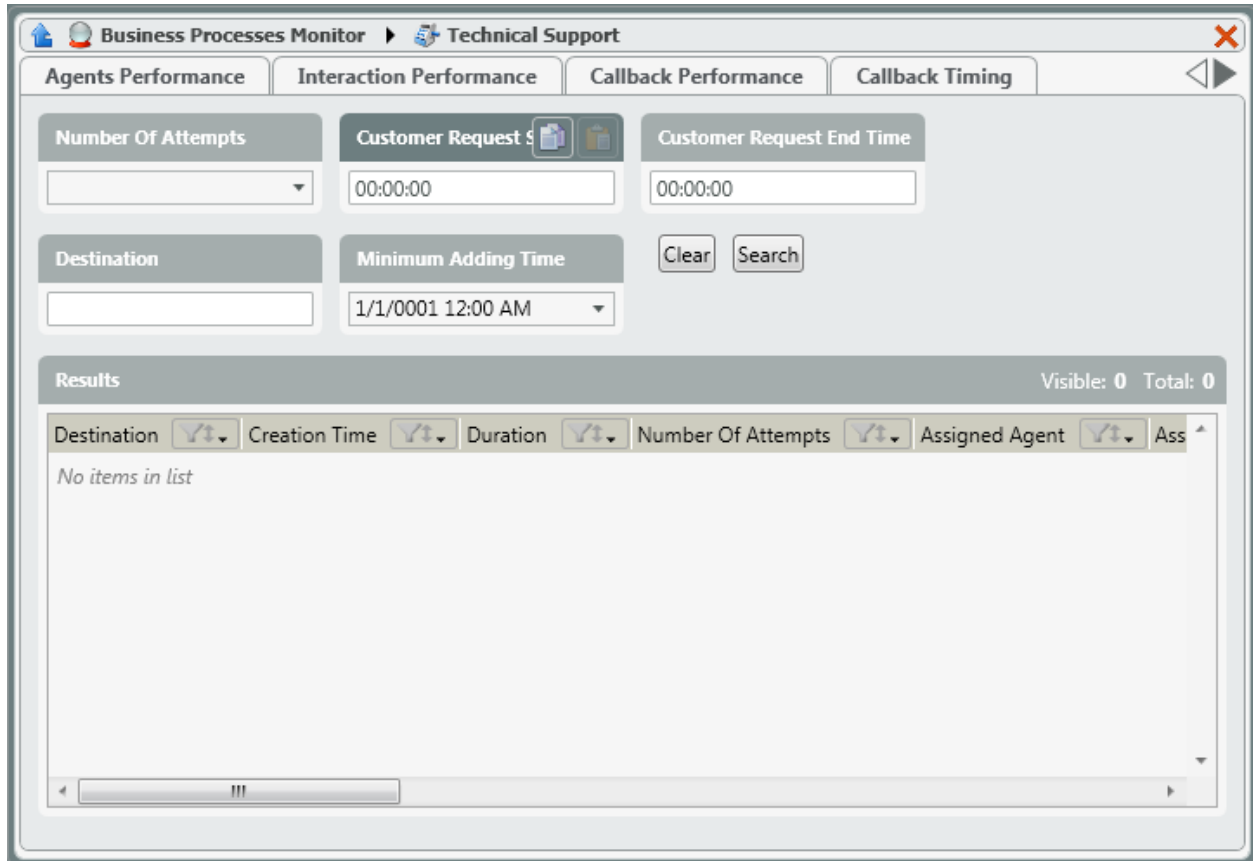


Figure 72: Callback Search Tab

The table below details the fields that can be found in the Callback Search tab.

Table 11: Business Process Index – Callback Search Criteria Fields

Field	Description
Number of Attempts	Select one of the following from the drop-down list: Any, No Attempt, One Attempt, Two or More Attempts
Customer Request Start Time	Enter the earliest time in which a customer asked to be called back.
Customer Request End Time	Enter the latest time in which the customer requested the callback should be received.
Destination	The customers phone number to be used when searching for a calling back.
Minimum Adding Time	The callbacks that were created after the specified date/time.
Results	
Destination	The customers phone number to be used for the Callback.

Creation Time	When the callback was created.
Duration	The elapsed time since this callback was created.
Number of Attempts	Total number of attempts made to reach the customer.
Assigned Agent	Agent assigned to the callback.
Assigned Team	Team assigned to the callback.
Interaction Location	
Last Remark	If a comment was entered by the agent (in the Agent Client or Supervisor Client) it will be displayed here.
Last State	This is the last attempt result. Possible outcomes include: No Answer, Busy, Wrong Number, Requested Callback, Max Attempts Reached.
Last State Time	
Customer Name	Customer Name.
Customer Time Zone	Customer Time Zone.
Customer Request Start Time	The earliest time the customer requested the Callback to occur.
Customer Request End Time	The latest time the customer requested the Callback to occur.
Customer Request Start Date	Date in which the customer requested the Callback to occur.

4.2.6 Callback Search Commands

The Callback Search Commands allow you to perform certain actions on the results of your callback search query. The following Callback Search Commands exist: Send to Queue and Purge Interaction.

- **To use the send to queue command:**
 1. Right-click anywhere on the record displayed in the results panel and select 'Send to Queue'.

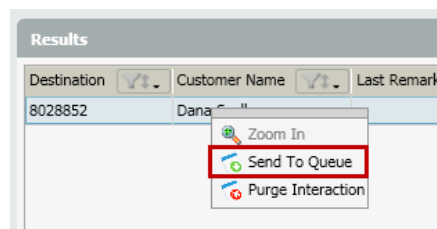


Figure 73: Send to Queue Command

This will send the callback interaction to the Business Process queue and the callback is handled immediately. This action is performed only on those callback interactions that are pending. This command sends the callback interaction to the queue even if the Business Process callback was stopped.

- **To use the purge interaction command:**

1. Right-click anywhere on the record displayed in the results panel and select 'Purge Interaction'.

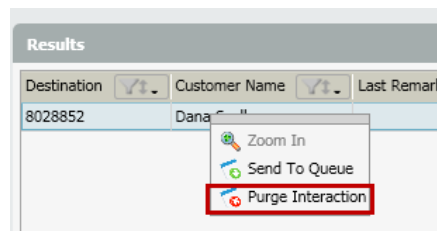


Figure 74: Purge Interaction Command

This cancels the Callback interaction. This Callback will be counted as ended with a "Purged" reason and towards the overall callback volume.

4.2.7 Current Interactions Tab

Use the Current Interactions tab to view all the Business Process interactions currently in process. This enables you to get a wider picture of how your Business Process is functioning in real-time.

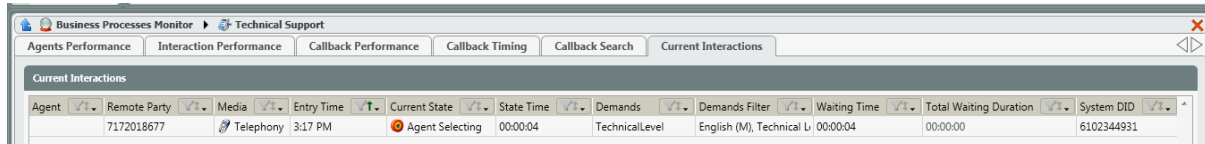


Figure 75: Business Process Current Interactions Tab

The table below details the fields that can be found in the Current Interactions tab.

Table 12: Business Process Index – Current Interaction Fields

Field	Description
Agent	The agent currently handling the interaction. If no agent appears it means the interaction is in the BP, but the agent is not yet handling the interaction.
Remote Party	The telephone number of the calling customer. If the customer's name is known in the system, their name will also appear here.
Media	The media type of the Interaction will be indicated by the relevant icon.
Entry Time	The time in which the interaction entered the BP or Channel.
Current State	The current interaction state (e.g. handling, wrap up,).
State Time	Indicates how long the interaction has been in the current state.
Demands	Demands (skills) assigned to the Interaction
Demands Filter	Current Demand Filter assigned to the interaction - this is a dynamic value and will update depending on how long the interaction waited in queue
Waiting Time	Indicates how long the interaction has been waiting in queue.
Total Waiting Duration	Indicates the total time the interaction has been waiting in queue.
System DID	The telephone number the customer dialed to interact with the BP or the system endpoint (extension) reached.
Interaction Type	The type of interaction (i.e incoming telephony, transferred telephony, incoming chat, incoming email, etc).
Assigned To	Agent / Team which the interaction is assigned to. If non exists – current Business Process is shown.
Customer ID	Customer ID.
Interaction ID	An internal number that is automatically assigned by the system.
Flow Version	Version of the flow.

4.3 Delegated and Abandoned Index

Use the Delegated and Abandoned Index to monitor and assign Abandoned Call Callbacks and respond to Interactions delegated by an Agent to the Supervisor for follow up.

The screenshot shows a software window titled "Delegated Interactions Monitor" with a "Delegated Interactions List" table. The table has columns for Initiator, Delegate Details, Remote Party, Interaction Type, Business Process, Campaign, Entry Time, Remarks, Last State, and Customer ID. It displays several rows of interaction data, including details like waiting times, agent names, and interaction types (e.g., Incoming Chat, Incoming Telephony). Some interactions are marked as "Abandoned" and others as "Delegated To Supervisor".

Figure 76: Delegated and Abandoned Index

The table below details the fields that can be found in the Delegated Interactions Monitor Tab.

Table 13: Delegated and Abandoned Index – Delegated and Abandoned Fields

Field	Description
Initiator	Indicates the source of the interaction (typically an agent or a BP).
Delegate Details	Message left by delegating agent or the queue details of an abandoned interaction.
Remote Party	Indicates the customer involved (e.g. customer’s phone number or name/email).
Interaction Type	The type of interaction (call, chat, etc.).
Business Process	The Business Process in which the interaction took place.
Campaign	The outbound Campaign in which the interaction took place; blank if no Campaign was involved.
Entry Time	The time in which the interaction started.
Remarks	The relevant comments/remarks that were entered during the interaction are displayed.
Last State	Interaction last state.
Customer ID	Customer ID.

The Delegated and Abandoned Index allows Supervisors to perform the following actions on Abandoned and Delegated Calls:

- Remove Selected Delegations
- Copy Remote Party to Clipboard
- Dial Now – for Remote Parties with an associated DID
- Ignore and Remove
- Request Callback

4.3.1 Remove Selected Delegations:

Allows the Supervisor to remove multiple Supervisor Delegated interactions. Remarks can be made as to why the Delegated interaction is being removed.

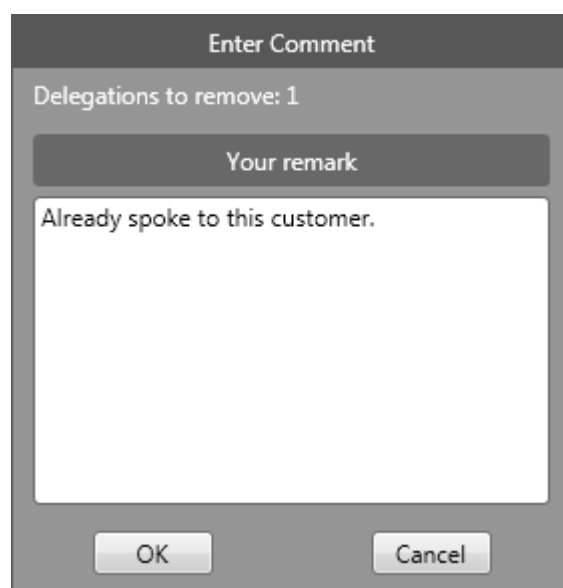


Figure 77: Enter Comment

4.3.2 Copy Remote Party to Clipboard:

Copies the customer's DID and allows the Supervisor to share that number with others (via email, chat, etc.) or open the Supervisor Agent App and copy the customer's number into the dial pad.

- Right click on an interaction with a DID. Select Copy Remote Party to Clipboard.

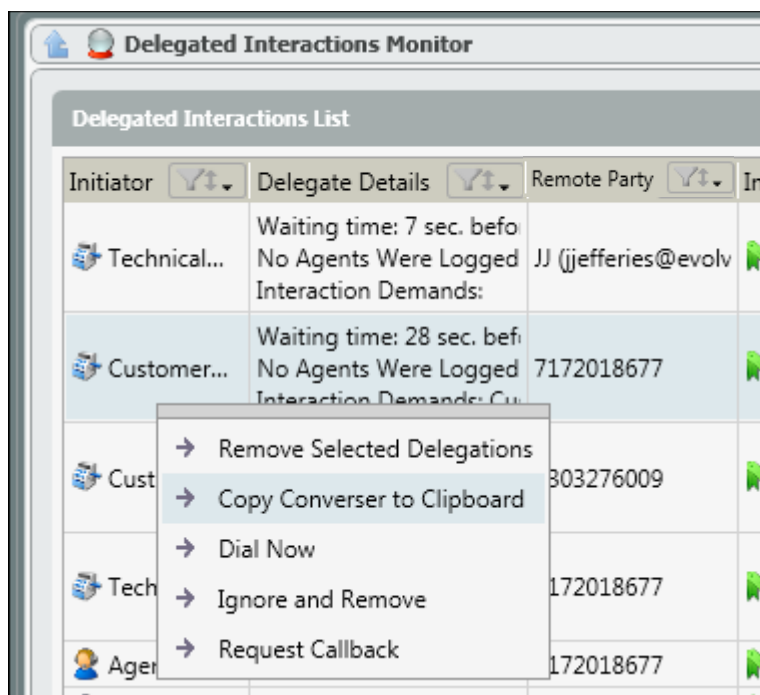



Figure 78: Copy Remote Party

Ensure the Supervisor state is set to Ready. Click  to open the phone book.

Select Dial and paste on the dial pad.

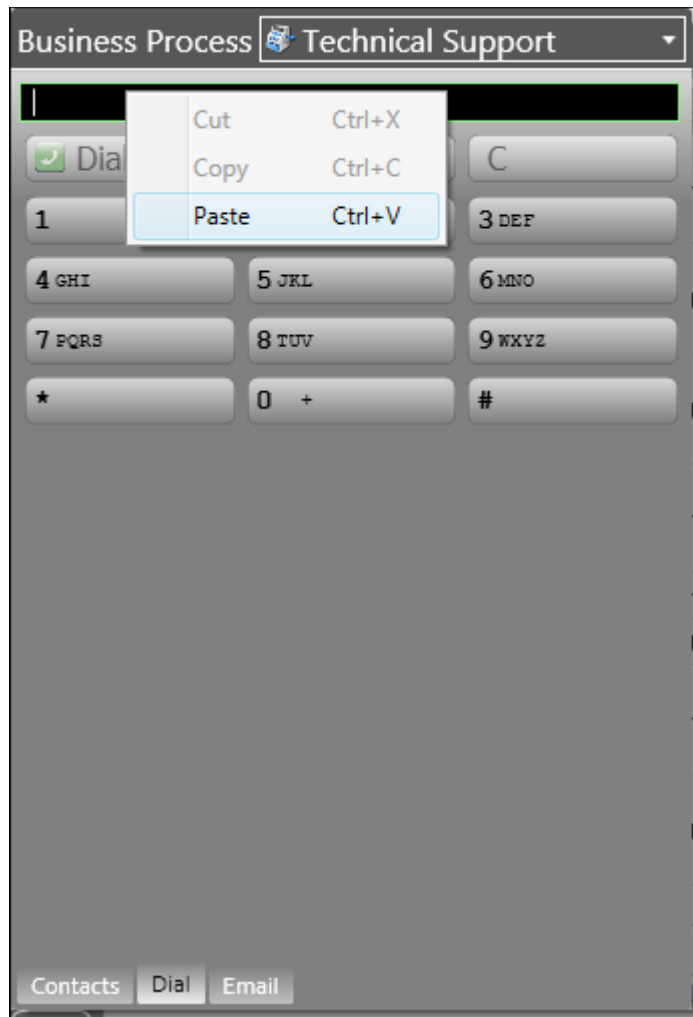


Figure 79: Paste Remote Party Number

This will paste the copied number into the dialpad. By selecting Dial, an outbound call will be placed to the copied number.

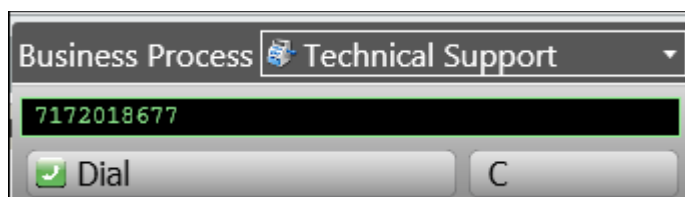


Figure 80: Dial

4.3.3 Dial Now

Dial Now allows the Supervisor to place an outbound call directly from the Delegated window.

1. Right click on an interaction with a DID. Select Dial Now.

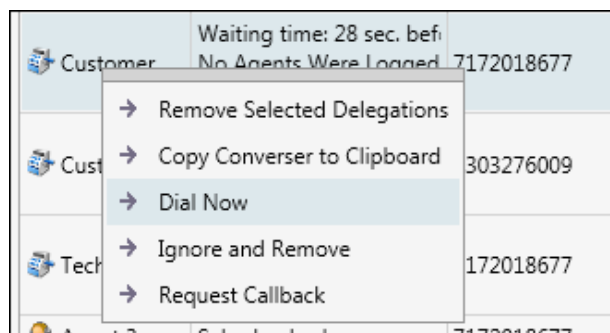


Figure 81: Dial Now

2. A call will connect with the Supervisor Agent App and immediately make the outbound call to the number selected.

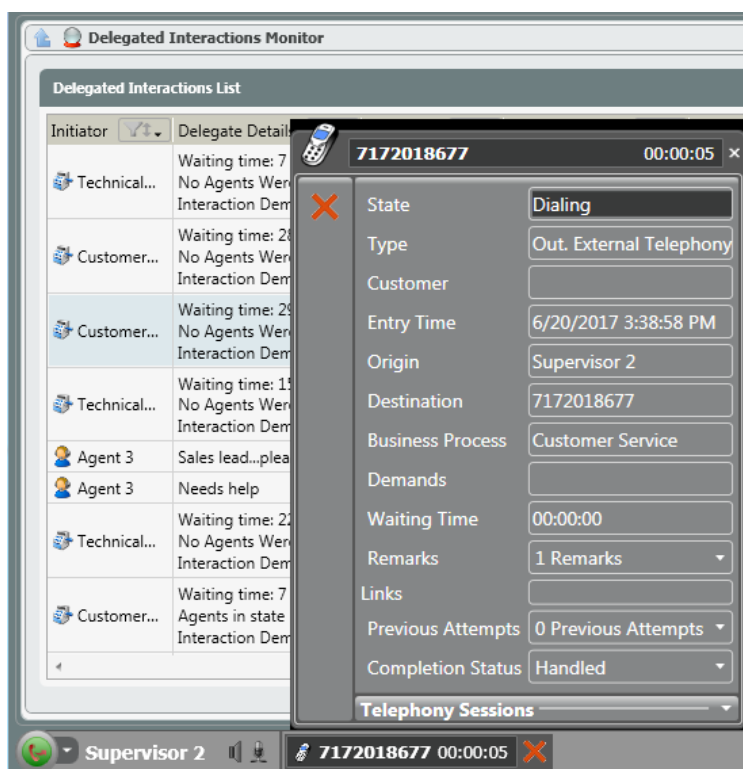


Figure 82: Dialed Contact

4.3.4 Ignore and Remove

Allows the Supervisor to ignore and remove a single interaction. Remarks can be made as to why the interaction is being ignored and removed from the index.

4.3.5 Request Callback

Allows the Supervisor to setup a Callback for the customer and assign the callback to either a specific agent or team.

1. Right click on an interaction and select Request Callback.

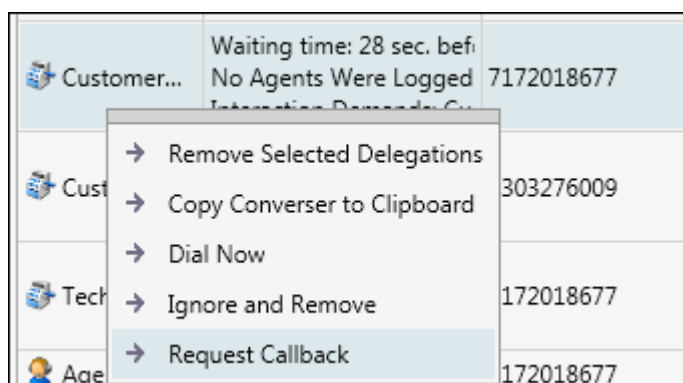


Figure 83: Request Callback

2. Once selected the Callback window will open to schedule the Callback. The Remote Party DID and Delegated Details will appear at the top. Under scheduling, fill in the following details:
 - a. From: Date in which the Callback will process.
 - b. Between: Start time of when the Callback will process.
 - c. And: End time in which the Callback will no longer be processed.
 - d. Callback BP: BP will autofill based on the BP the interaction came from. The BP can be adjusted to process the Callback through another BP.
 - e. Destination: The Remote Party's DID.
 - f. Assigned Agent: Assign the Callback to a specific Agent.
 - g. Assigned Team: Assign the Callback to a specific team of agents - assigning it to a team will present the Callback to the first available agent within that team when the Callback is set to be processed.
 - h. Customer Time Zone: Time Zone of the customer.
 - i. Your Remark: Add remarks to the Callback for the Agent to reference when they receive the Callback.

Enter Callback scheduling details and comment

Converser	7172018677
Delegate details	Waiting time: 28 sec. b No Agents Were Logg Interaction Demands: (

Scheduling

From	6/20/2017
Between	1:30 PM
And	3:30 PM
Callback BP	Customer Service
Destination	7172018677
Assigned Agent	Agent 3
Assigned Team	
Customer Time Zone	(UTC-05:00) Easte

Your remark

Customer wanted a callback to discuss pricing options around the different polycom phone models.

Figure 84: Callback

4.4 Contacts Index

The Contacts Index allows Supervisors to manage the contact lists imported and utilized when running campaigns or within their CRM

Imported contact lists are shared across all Supervisor Clients.

4.4.1 Quick Search

The Quick Search tab allows Supervisors to search for contacts that have been imported and stored in the system.

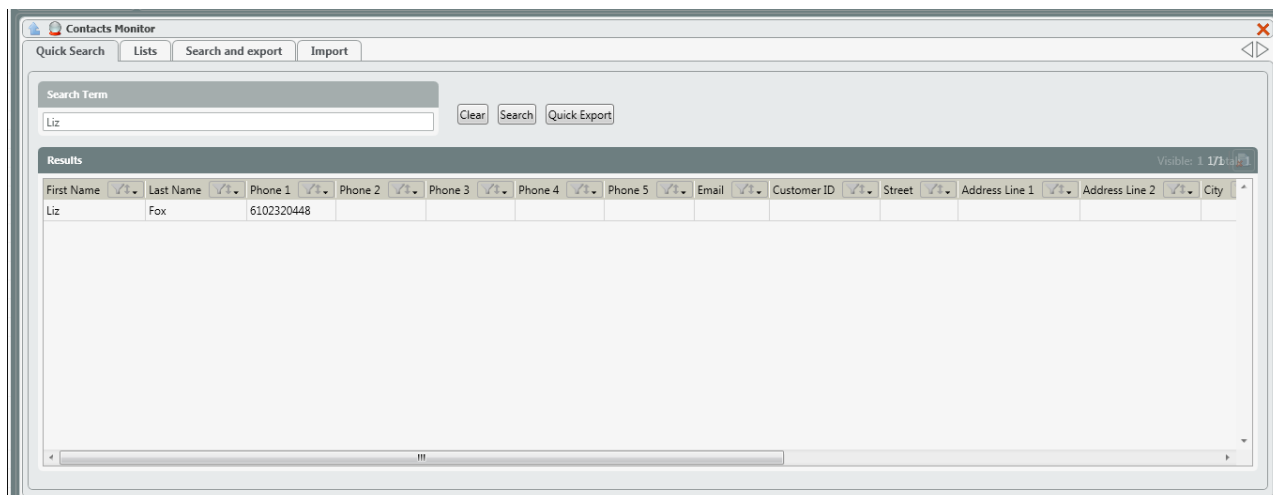


Figure 85: Contact Search

1. Search Term – Enter in the search term to bring up contacts. The term can contain anything found within the results bar (Frist/Last Name, Phone Number (full or partial number), Address, etc.).
2. Clear – Clears a current search.
3. Search – Once a search term has been entered, select search to pull up the search results
4. Quick Export –
5. Results – Showcases the results based on the search term entered. Not all columns will be filled in for each contact. The information that was provided in the initial upload will show up in the search results.

4.4.1.1 Deleting a Contact

To delete a contact within the Results window, right click on the contacts name and select Delete.

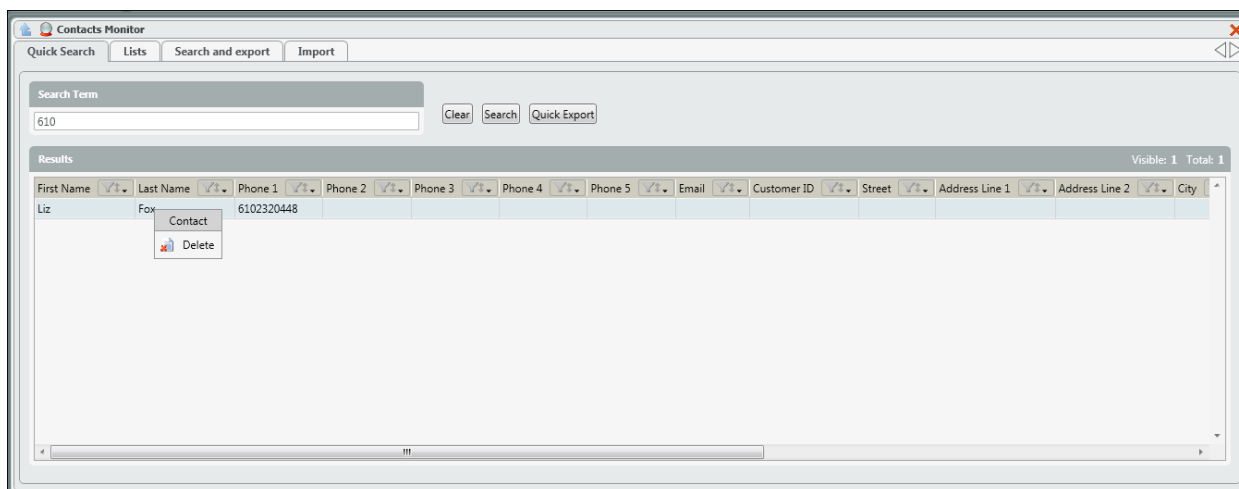


Figure 86: Deleting a Contact

After deleting the contact, performing a second search for the contact will produce a an error message indicating that *“No contacts meet the search criteria”*

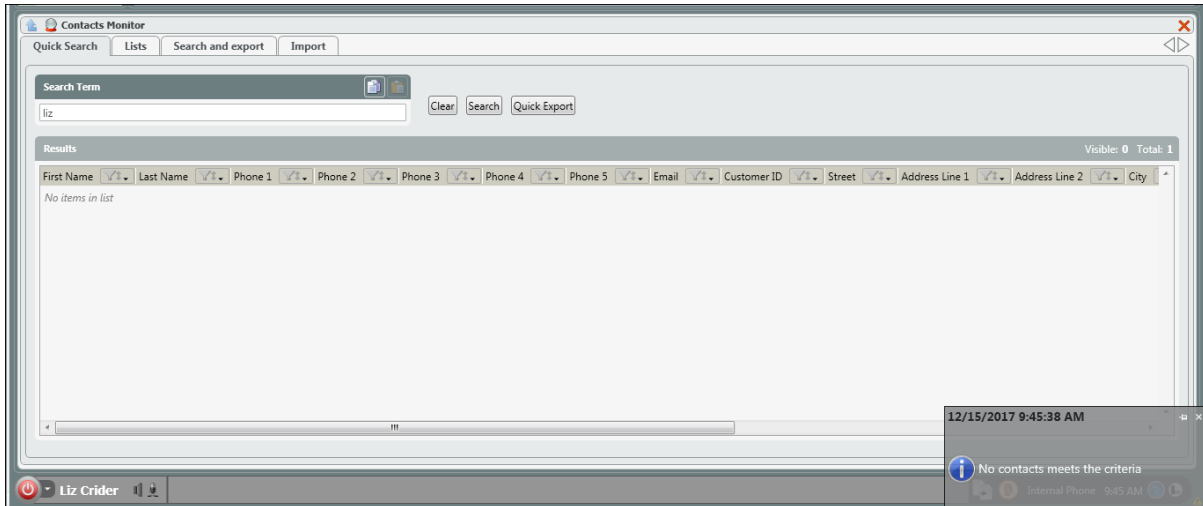


Figure 87: Deleting a Contact

4.4.2 Lists

The Lists tab shows all the imported contact lists that have been added to the system. Contacts can be used within the enterprises CRM or for Campaigns.

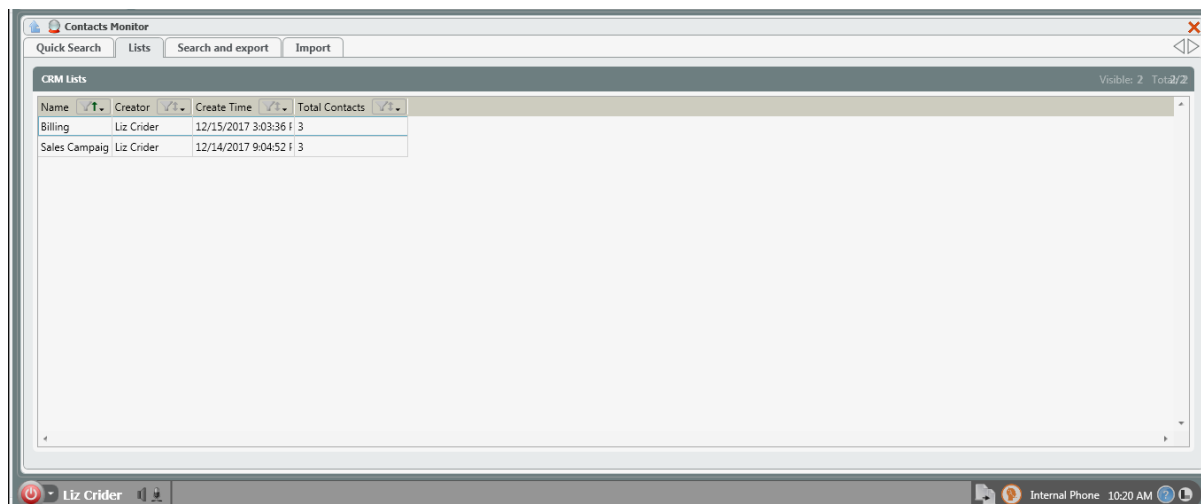


Figure 88: Contact Lists

1. Name – name of the CRM / contact list.
2. Creator – user that Imported the contact list.
3. Create Time – time and day the list was imported.
4. Total Contacts – total number of contacts found in the list.

4.4.2.1 Renaming a List

Once a list has been imported, it can be renamed.

1. Right click in a contact list and select Rename.

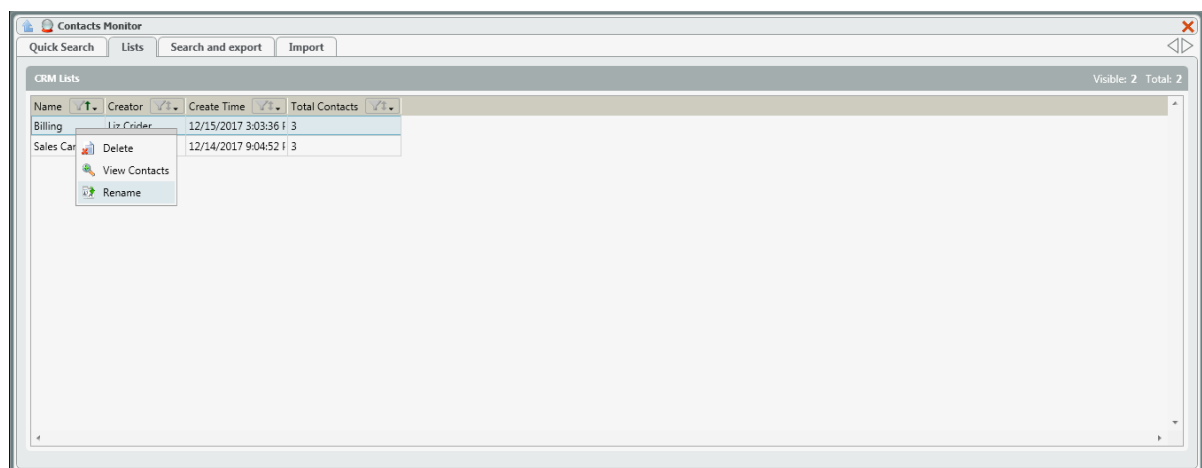


Figure 89: Renaming a List

2. In the Rename List popup, enter in the new name of the list and select OK.

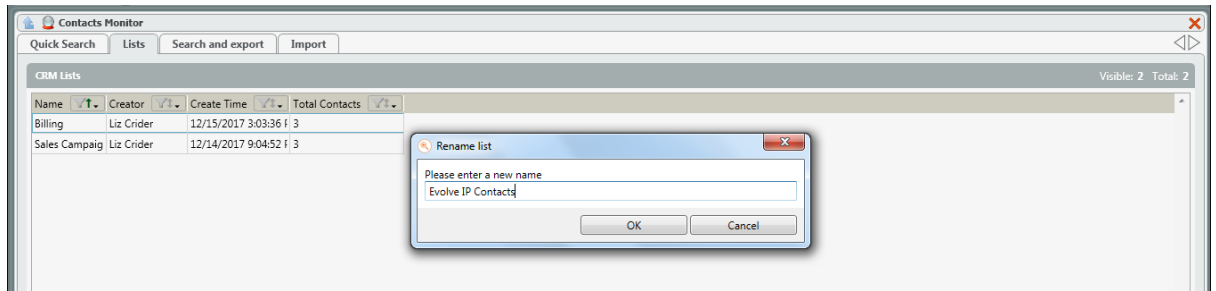


Figure 90: Renaming a List

3. The list will be updated with the new name.

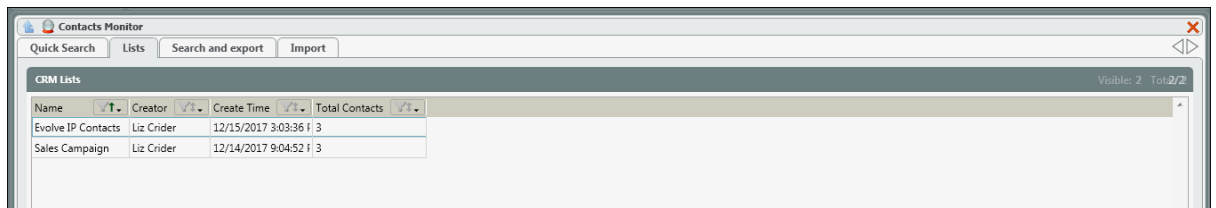


Figure 91: Renaming a List

4.4.2.2 Deleting a List

When a list is no longer needed it can be deleted. This action can not be undone.

1. Right click on a list and select Delete.

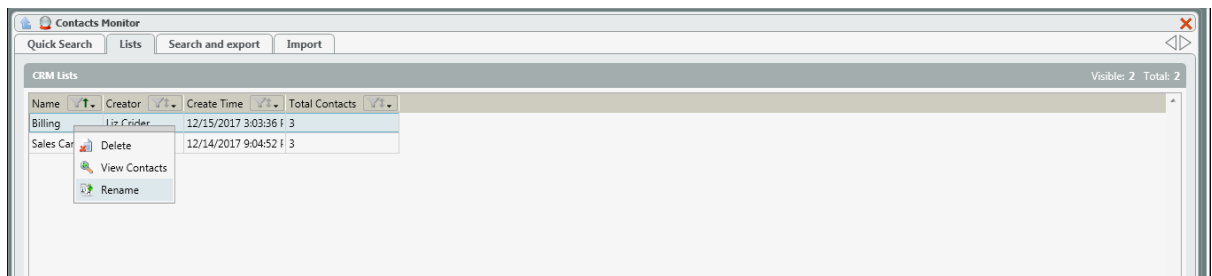


Figure 92: Renaming a List

2. A confirmation message will appear, asking to confirm the deletion of the list. Click OK to delete the list or Cancel to cancel the action.

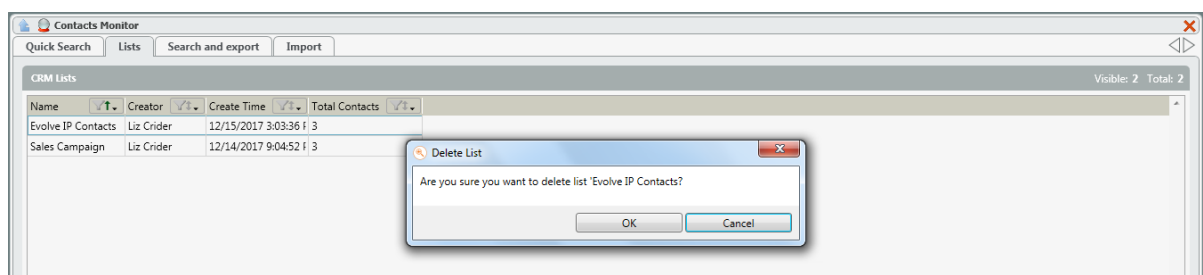


Figure 93: Deleting a List

3. The list will be removed. Contacts in the list will no longer be available when performing a quick search.

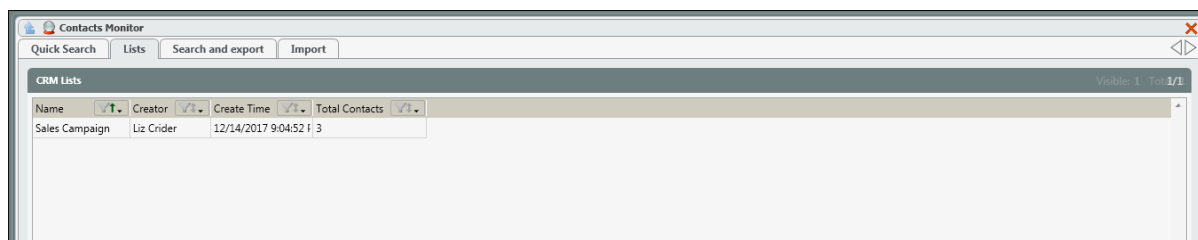


Figure 94: Deleting a List

4.4.2.3 Viewing a List

Supervisors can view the full list of contacts and contact details.

1. Right click on the imported contact list you wish to view, select View Contacts.

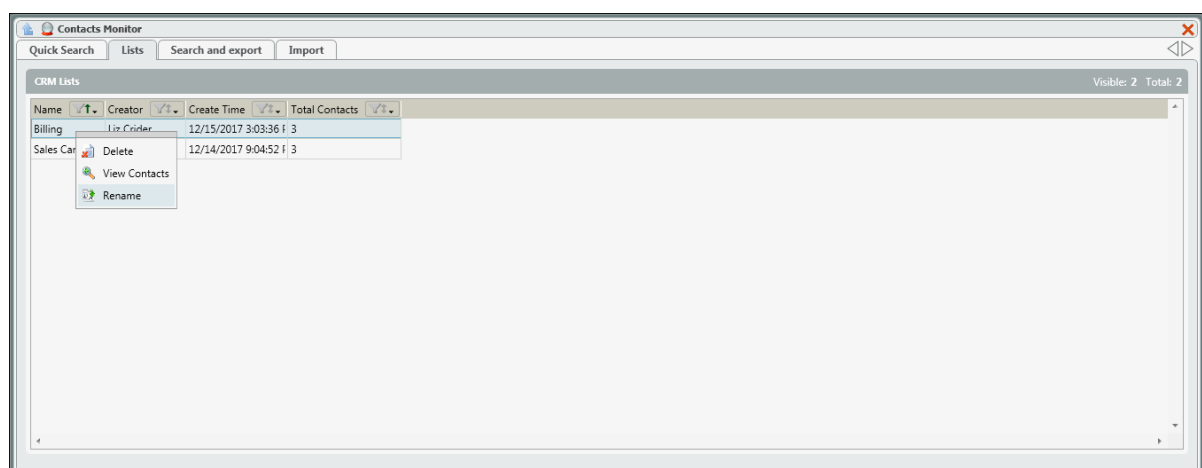


Figure 95: Viewing a Contact List

2. This will automatically open the Search and Export Tab and populate with the selected list.

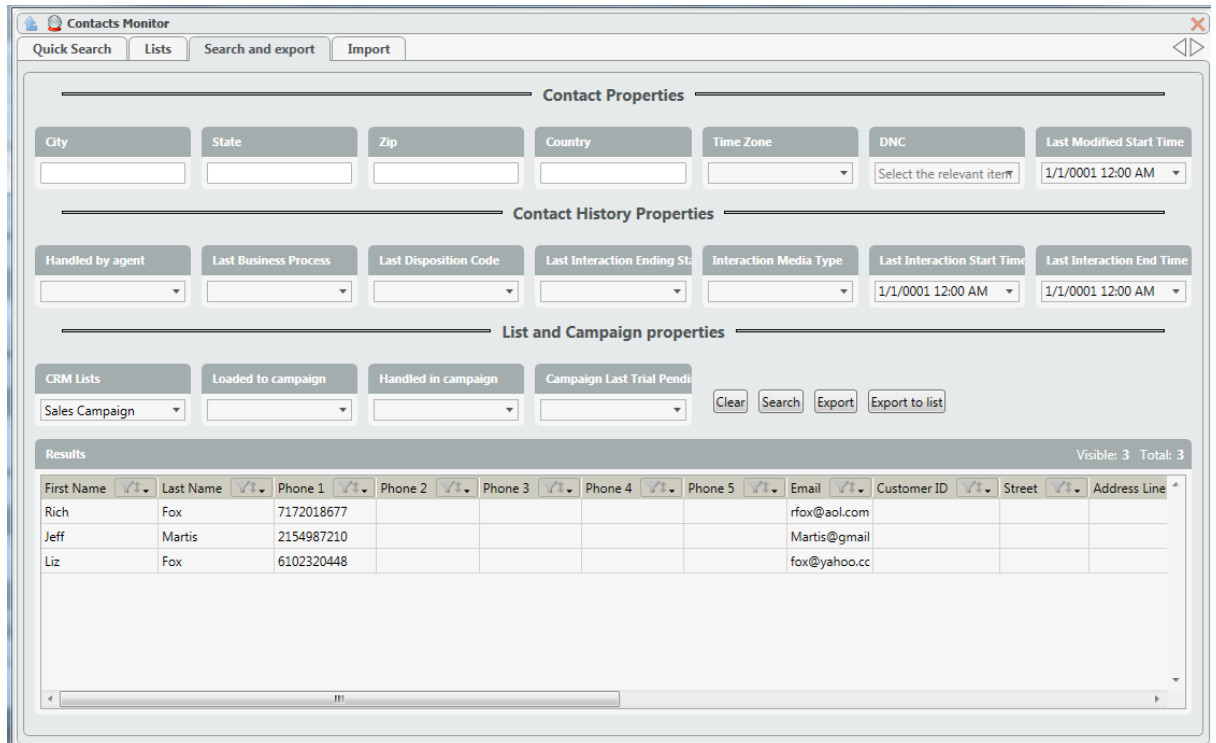


Figure 96: Viewing a Contact List

3. Within the search results, the ability to delete an individual contact is available, by right clicking on any name and selecting Delete.

4.4.3 Search and Export

You can Search and export contacts based on specific search criteria as shown below and then click Search or Export buttons.

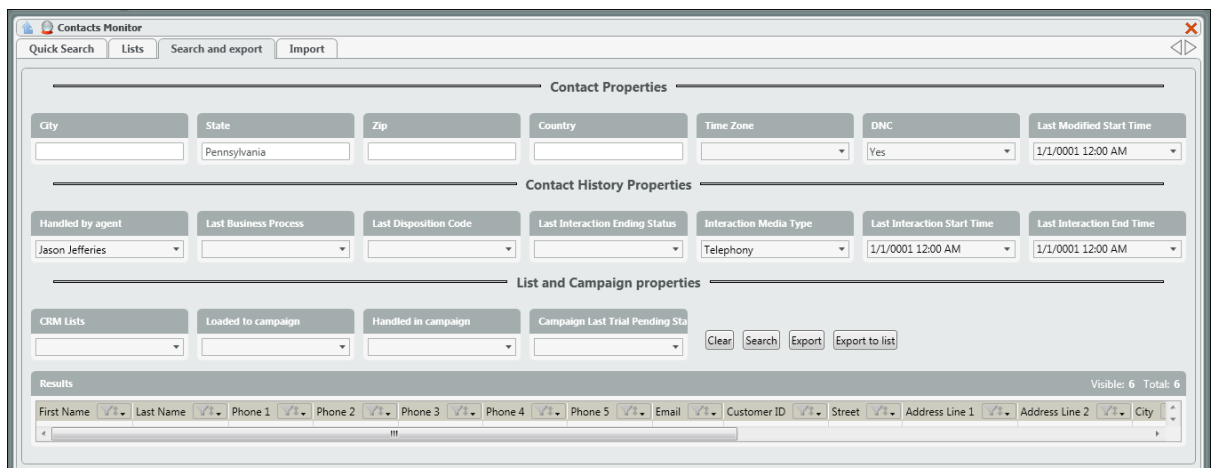


Figure 97: Search and Export

Contact Properties:

1. City
2. State

3. Zip
4. Country
5. Time Zone - Select from the available time zones in the dropdown
6. DNC – Select Yes to view contacts that are currently on the DNC list. Select No to view contacts that are not part of the DNC list.
7. Last Modified Start Date – Enter in a Date and Time for last when the contacts were last modified date

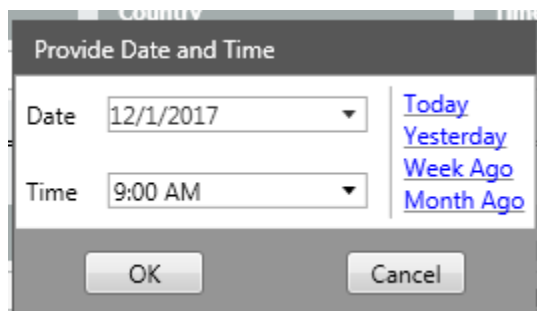


Figure 98: Search and Export

Contact History Properties

1. Handled by Agent – search contacts that have been handled by specific agent. Select the agent from the dropdown.
2. Last Business Process – search contacts based on the last Business Process they interacted with. Select the Business Process from the dropdown.
3. Last Disposition Code – search contacts based on the last disposition code assigned to the contact(s). Select the disposition code from the dropdown.
4. Last Interaction Ending Status – search contact(s) based on the last interaction ending status. Select the interaction status from the dropdown.
5. Interaction Media Type – search contact(s) based on the interaction media type: Chat, Email, Fax, Telephony.
6. Last Interaction Start Time – search contacts based on a start time of the interaction.
7. Last Interaction End Time – search contacts based on the end time of the interaction.

List and Campaign Properties

1. CRM Lists – search for contacts that are found in the selected CRM list.
2. Loaded to Campaign – search for contacts found in a specific campaign.

3. Handled in Campaign – search for contacts that have been handled in a campaign.
4. Campaign Last Trial Pending Status – search for contacts based on their pending status.
5. Clear – clear search results.
6. Search – search for contacts based on search entries.
7. Export – launches Export wizard.
8. Export to List – export search contacts to another CRM list.

4.4.3.1 Export Contacts

Exports will occur in a ZIP file containing XLS, CSV and TXT versions.

1. Enter in the search criteria and click search to bring up contact records.

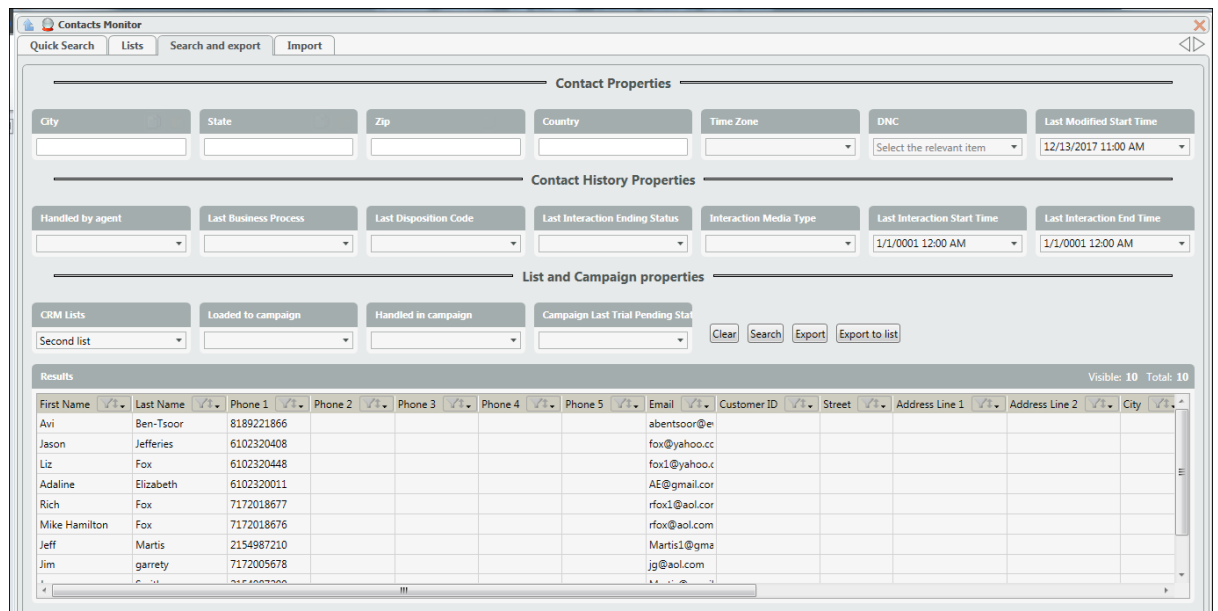


Figure 99: Export Contacts

2. Select Export
3. The Contact Export Wizard will open. Select Next.

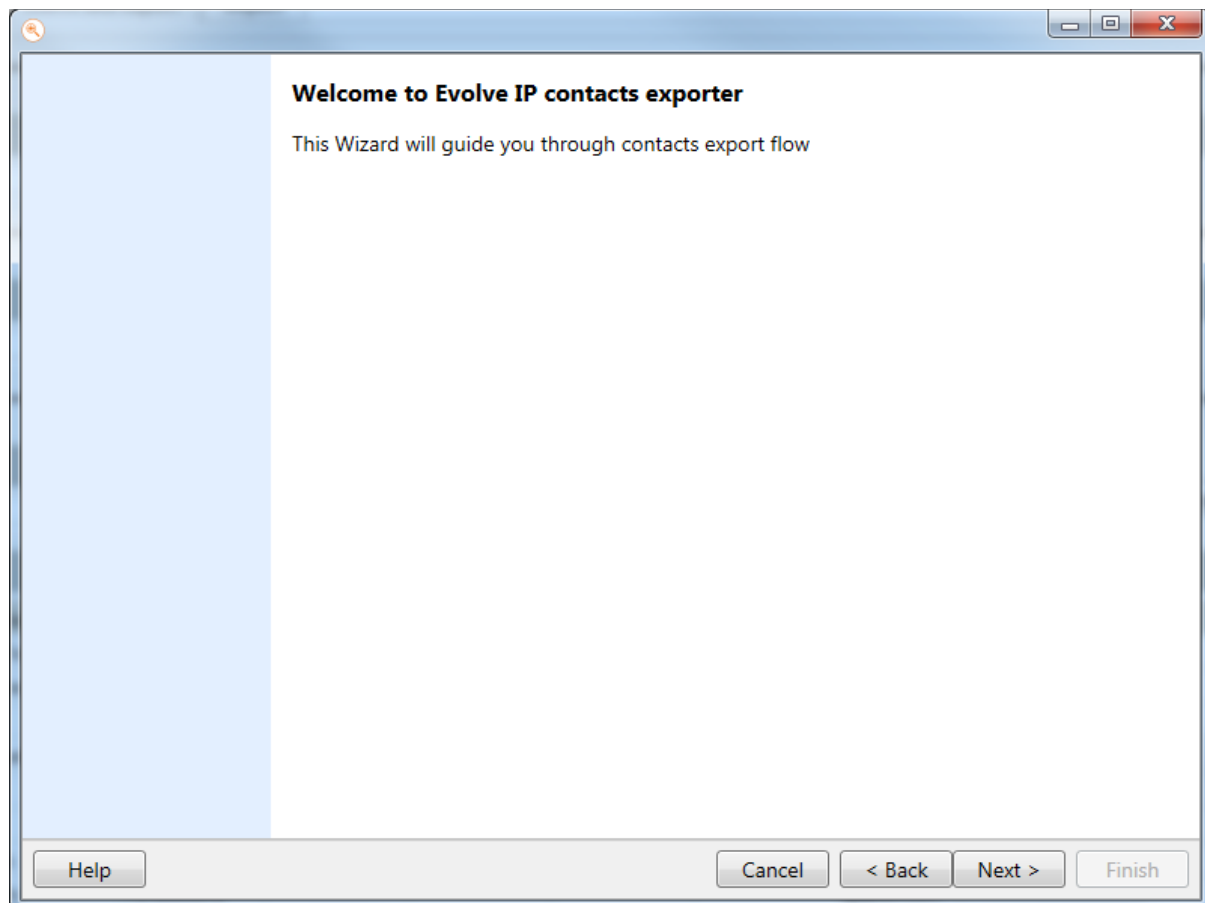


Figure 100: Export Wizard

4. From the right-hand column, select the fields for the contacts you would like exported: Contact information, Contact History or a combination of the two.
5. If an alternate name for a column is preferred, enter the name in the Alternate Column Name space.

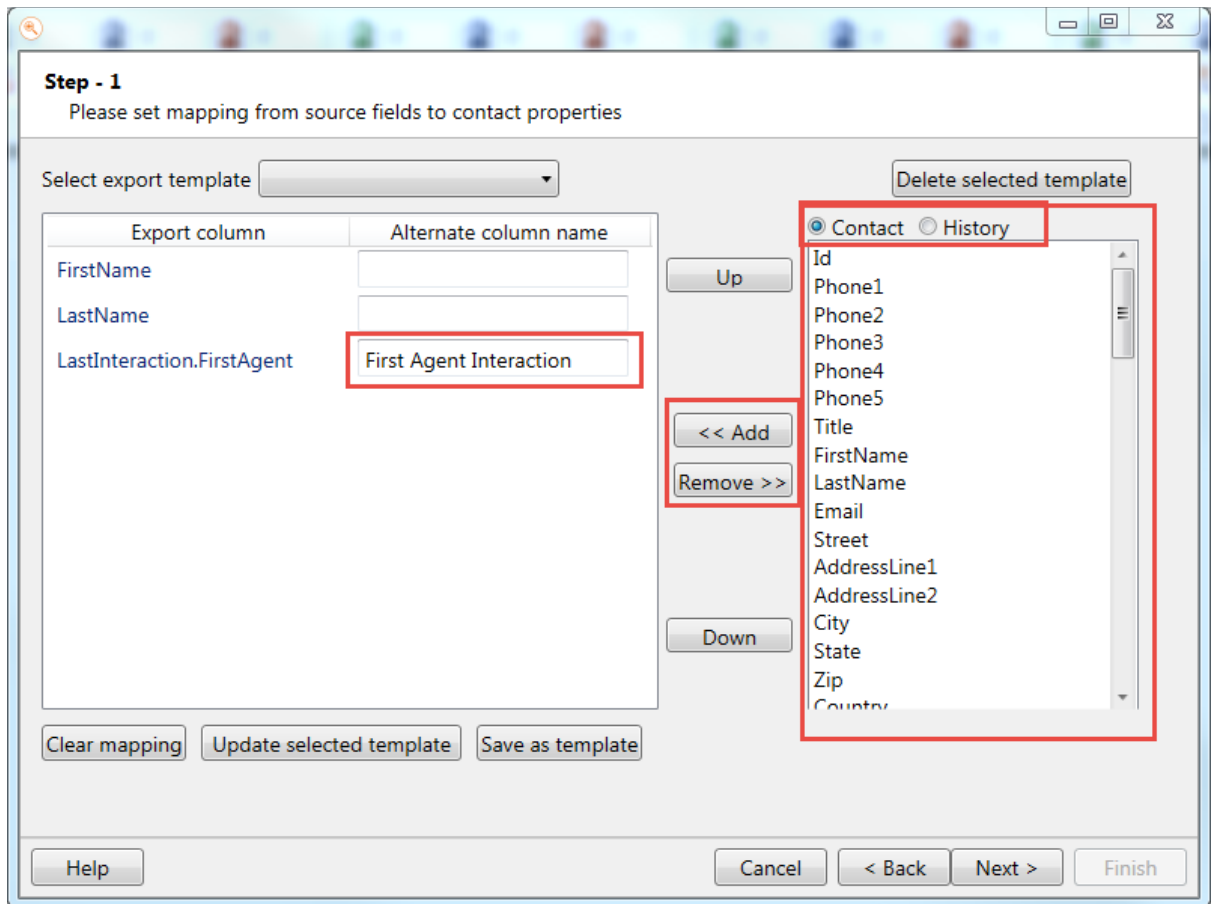


Figure 101: Export Wizard

6. Select Clear Mapping if you wish to reset your export criteria.
7. Select update selected template, if a current template has been selected and edits have been made to the template.
8. Select Save as template if you wish to save the current mapping selections for future exporting needs.

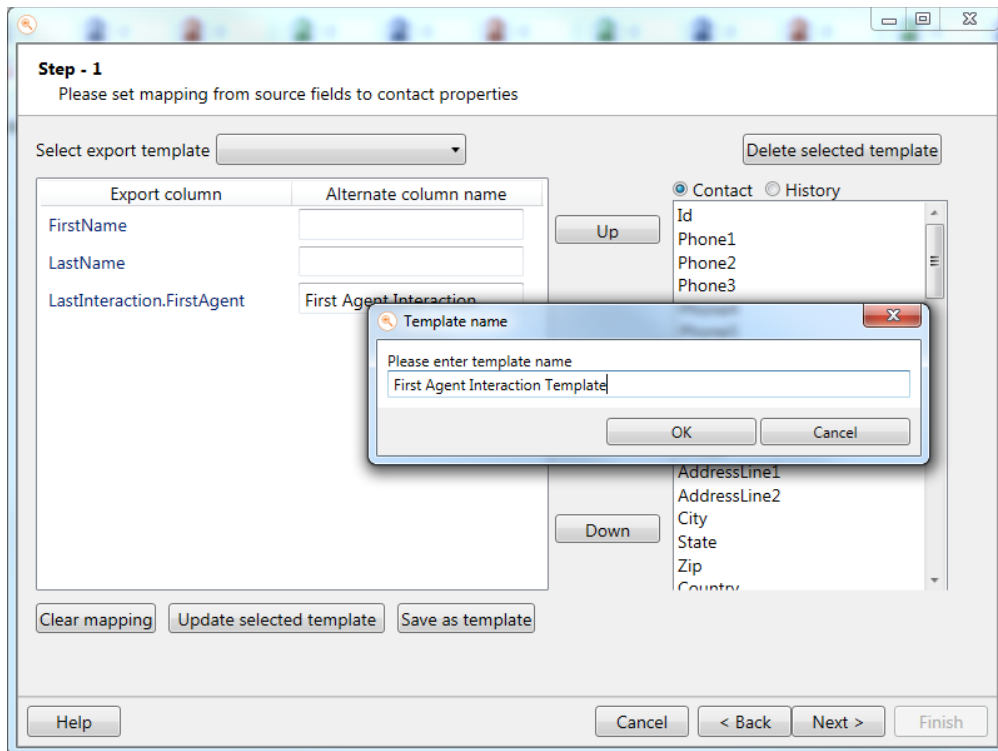


Figure 102: Export Wizard

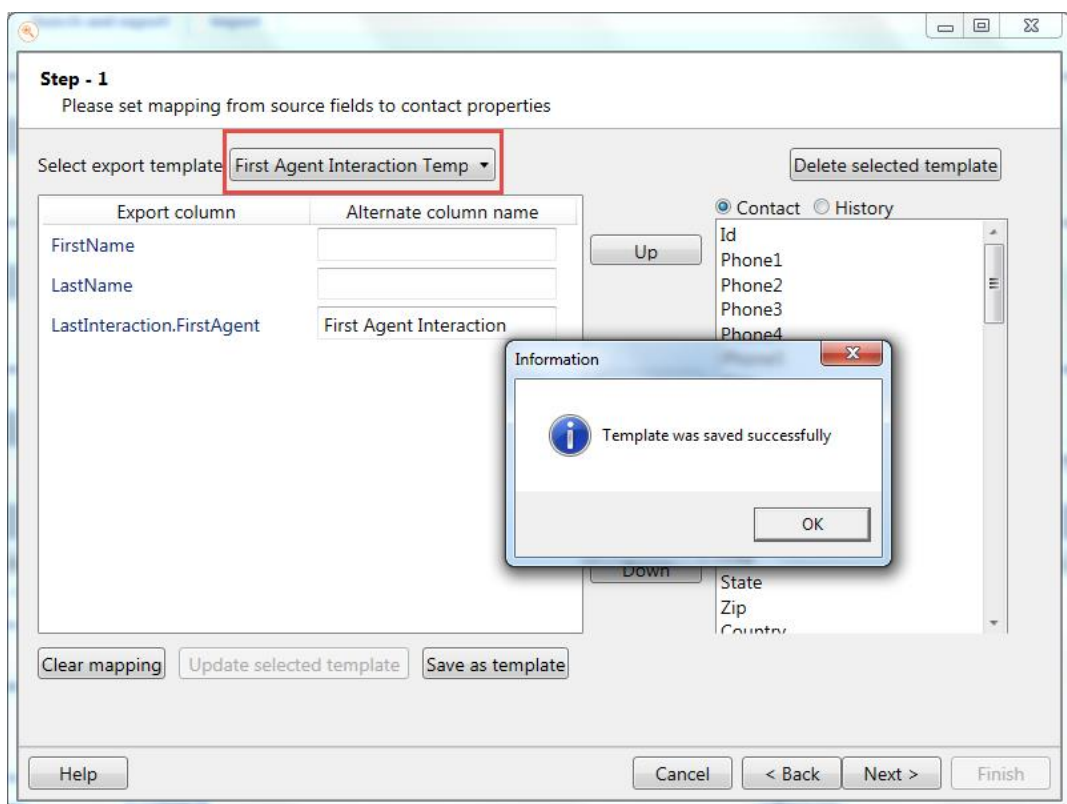


Figure 103: Export Wizard

9. Select Next.
10. On the export page, select the checkbox if you wish to include the contact history of the records being exported. Select export.

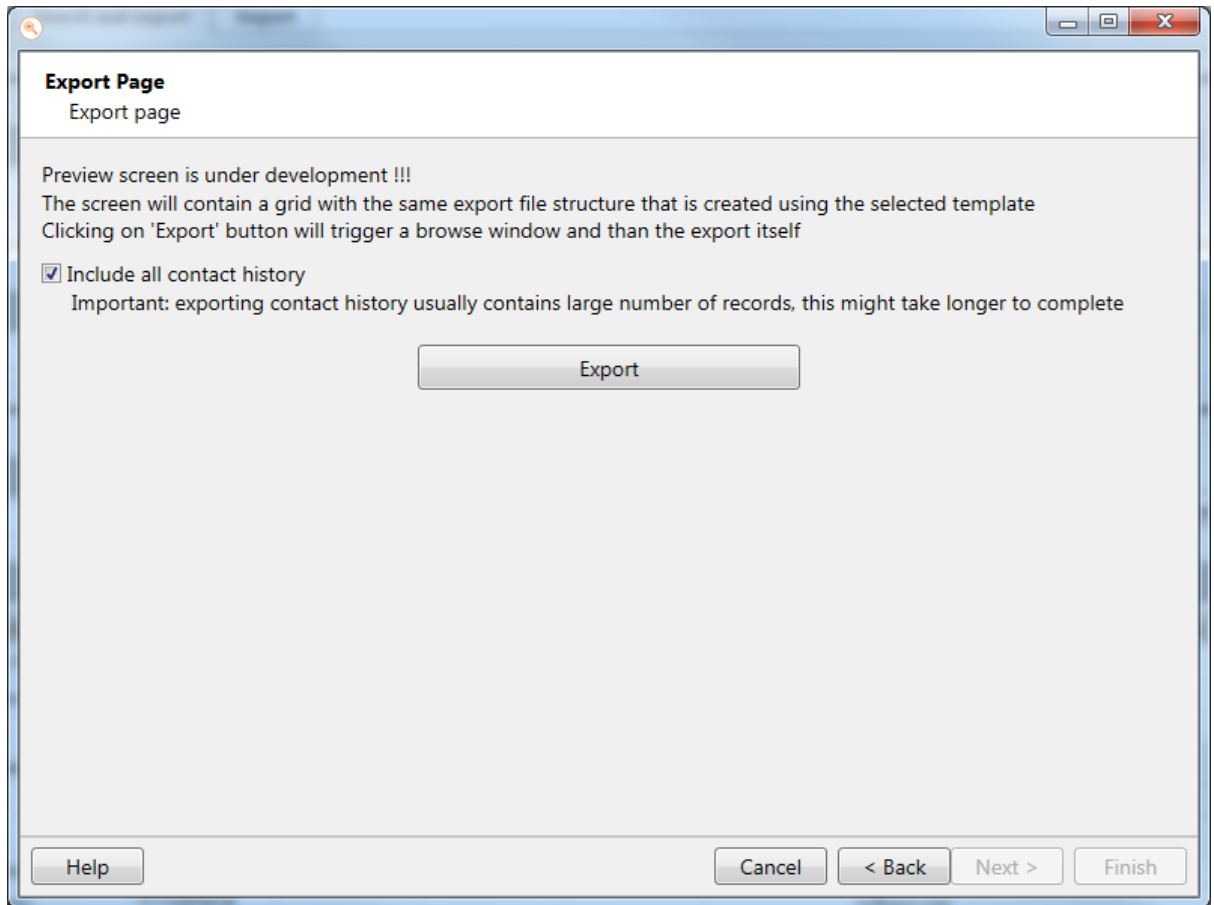


Figure 104: Export Wizard

11. Locate and save the file in a folder of your choice.

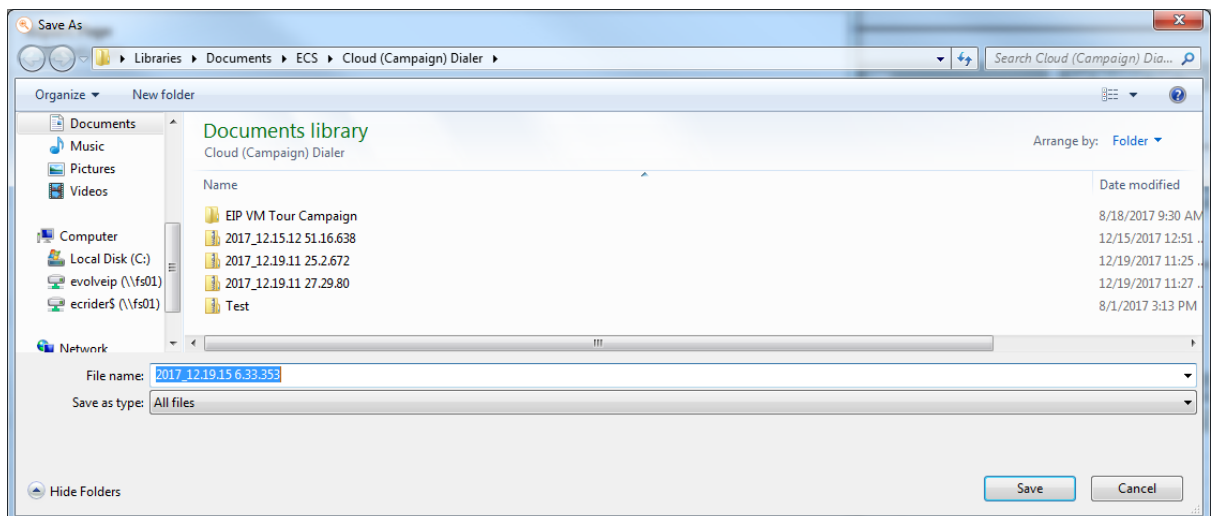


Figure 105: Export Wizard

- Once saved, you will get a confirmation message and the option to open the folder and view the files.

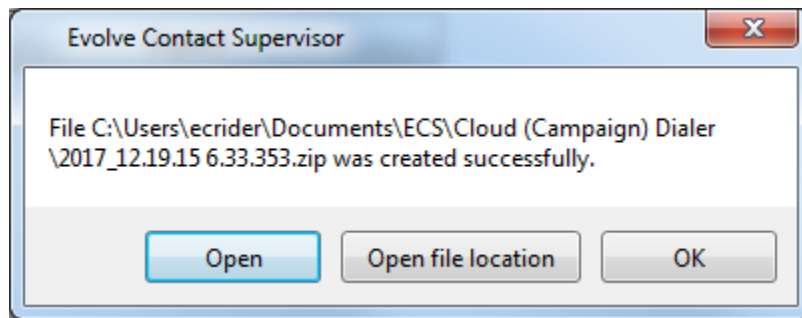


Figure 106: Export Wizard

4.4.3.2 Export to List

- Enter in the search criteria and select search to bring up contact records.

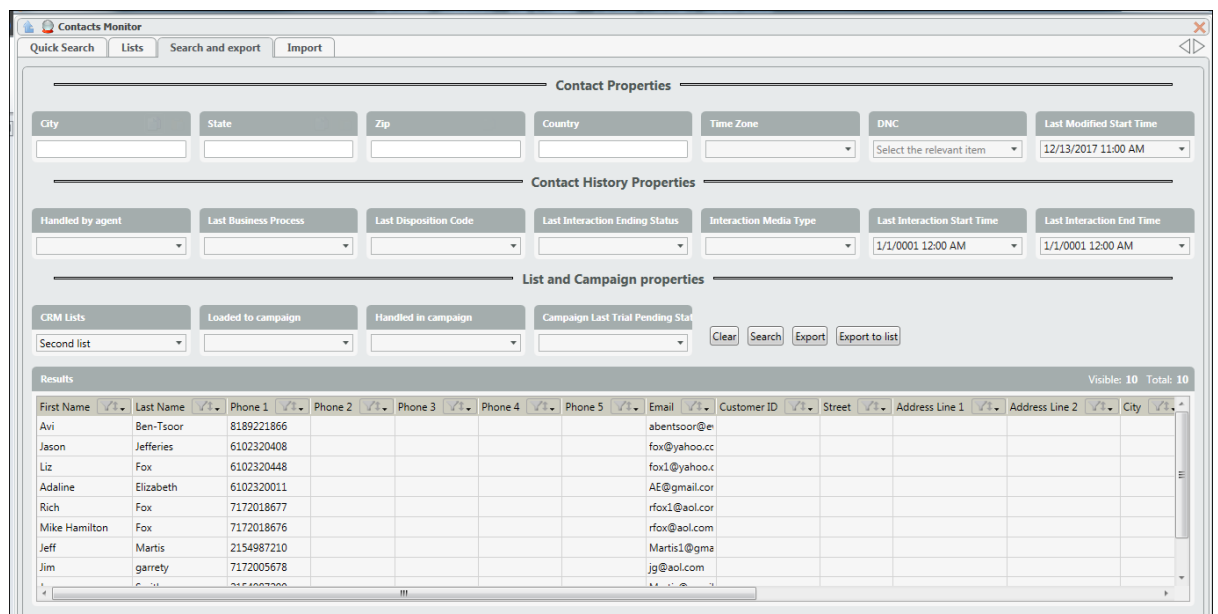


Figure 107: Export to List

- Select Export to List.
- From the drop down select the list you wish to add (export) the searched contacts to and select OK.

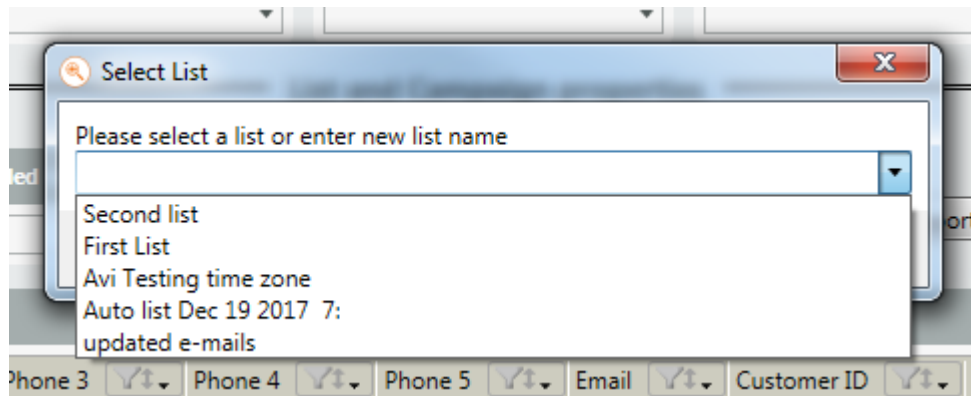


Figure 108: Export to List

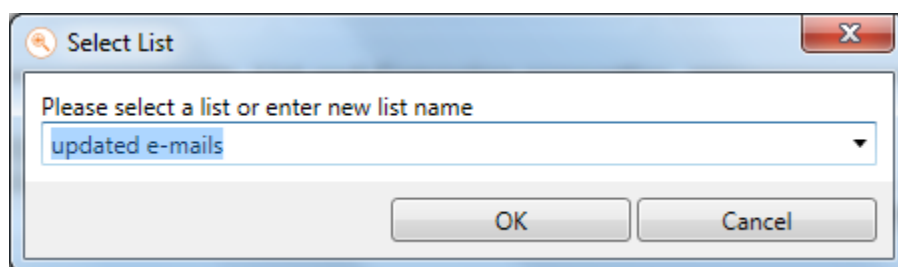


Figure 109: Export to List

4. A successful confirmation message will appear once the contacts have been exported successfully.

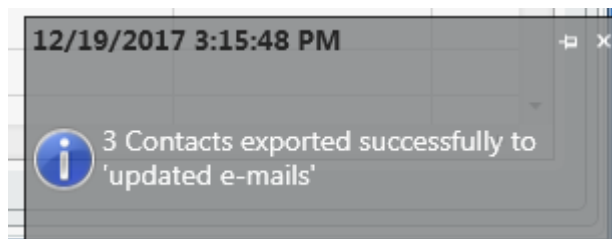


Figure 110: Export to List

4.4.4 Import

Provides the history of all imported lists within all the Supervisor client's, as well as the ability to import new lists for Campaign use or the CRM.

The screenshot shows the 'Contacts Monitor' application window. At the top, there are tabs for 'Quick Search', 'Lists', 'Search and export', and 'Import'. Below the tabs is a button labeled 'Import contacts wizard'. The main area displays a table titled 'CRM Lists Import History' with the following data:

Upload Date	Total Records	Updated Records	Inserted Records	List Name
12/14/2017 9:04:53 P	3	0	3	Sales Campaign
12/15/2017 3:03:36 P	3	0	1	Evolve IP Contacts
12/15/2017 3:05:10 P	3	3	0	Sales Campaign
12/15/2017 4:43:27 P	3	0	0	Billing
12/15/2017 4:51:06 P	3	0	0	Billing
12/15/2017 4:53:04 P	3	0	0	Test List

Visible: 6 Total: 6

Figure 111: Contacts Index

1. Uploaded Date – Date and time the contact list was imported.
2. Total Records – total number of contacts on the list.
3. Updated Records – total number of contacts that have been updated within the list.
4. Inserted Records – total number of contacts created when the list was imported.
5. List name – name of the contact list.

4.4.4.1 Importing a Contact List

1. Click on the Import Contacts Wizard

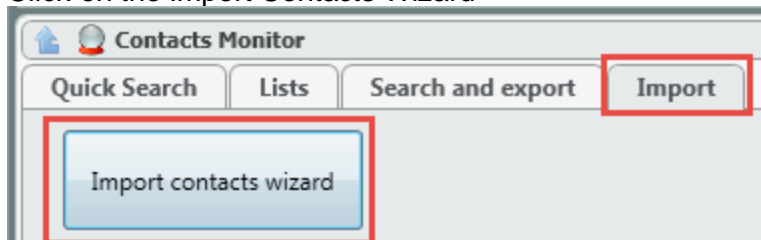


Figure 112: Importing Contacts

2. The following screen will open. Click Next.

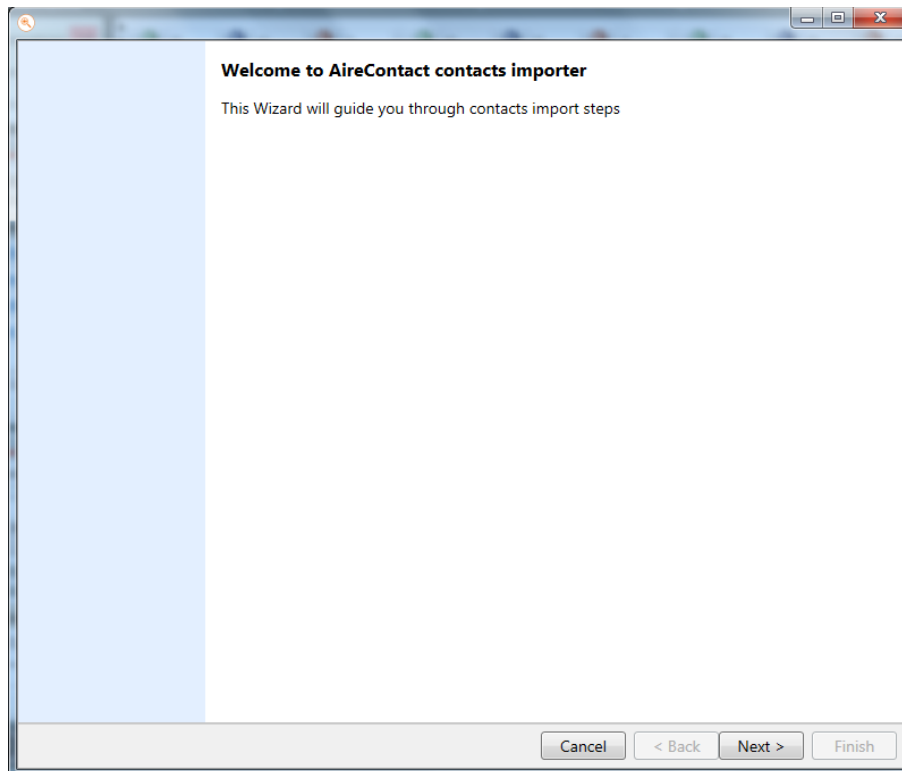


Figure 113: Contacts Import Wizard

3. Select Browse to upload the Contact list.
 - a. Once a file has been selected, choose to upload the list to an existing list (select list from the drop down) or create a new list (enter in the new list name).
 - b. Select Update Existing Contacts if updating an existing contacts information to an already existing list.
 - c. Select Auto Calculate Time Zone, if not exist in file if applicable.
 - d. Select Exclude Records with invalid/empty contact time zone if applicable .

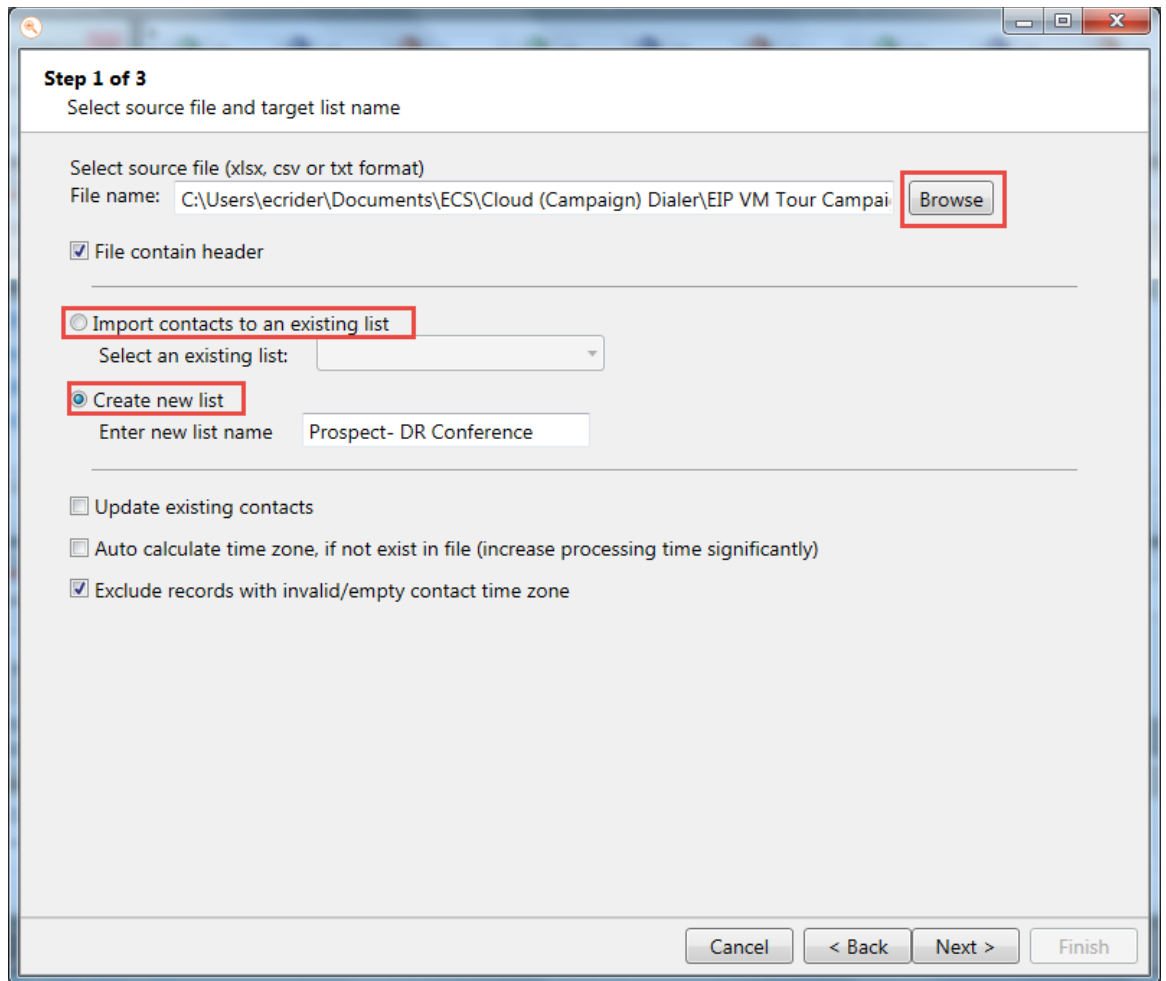


Figure 114: Contacts Import Wizard

4. Select Next.
5. On the next screen you will see an example of a contact with the heads that were populated within the spreadsheet that was uploaded.

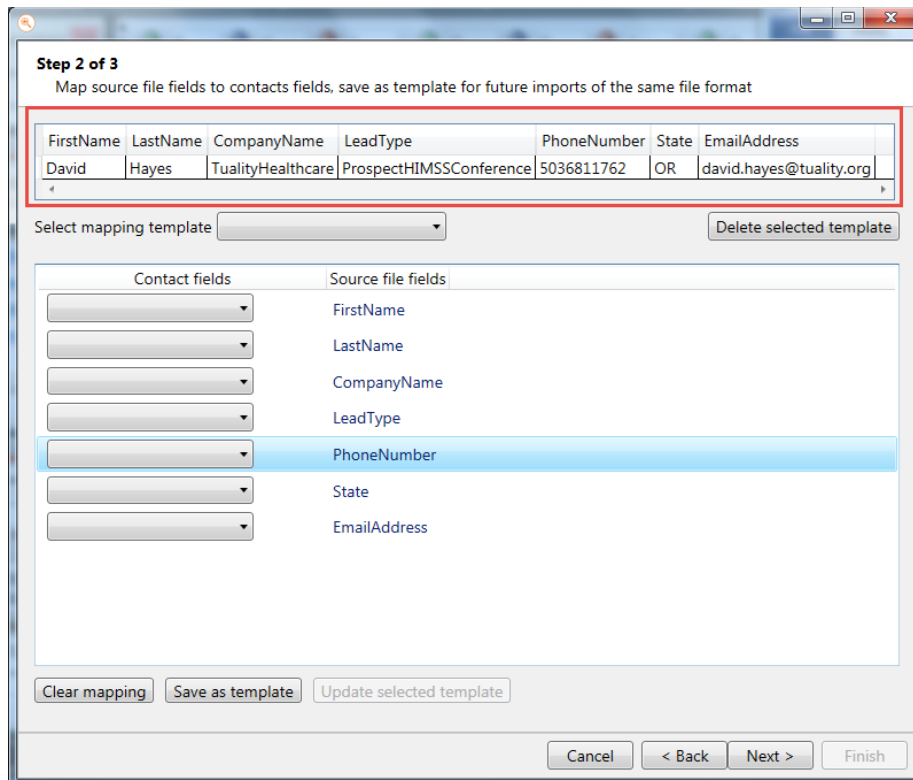


Figure 115: Contacts Import Wizard

- To display this information to the agent when receiving a Campaign call, select the appropriate Contact Fields from the drop down that match the Source File Fields show on the right hand column.

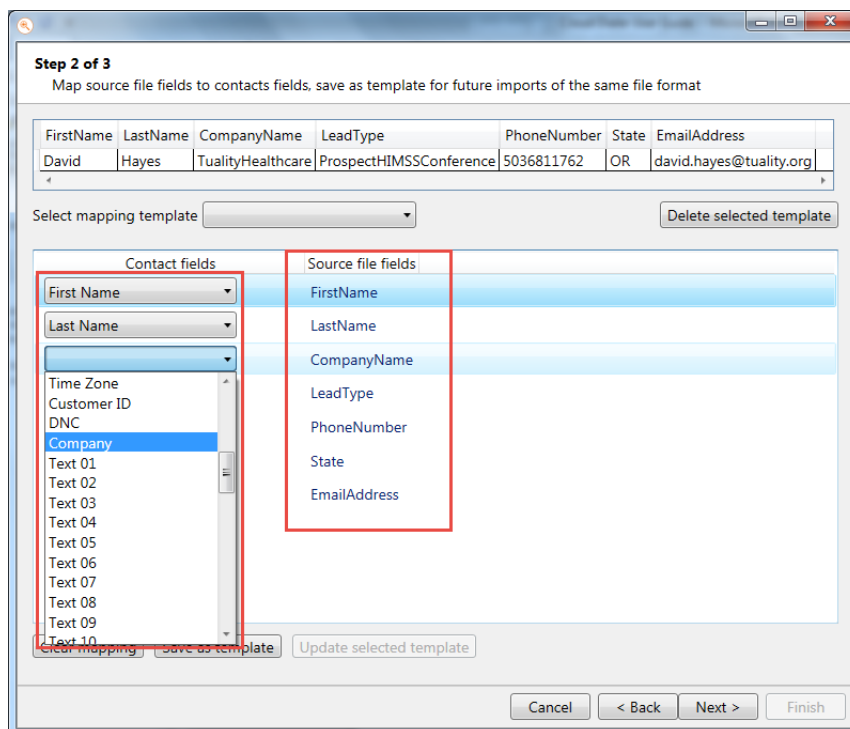


Figure 116: Contacts Import Wizard

7. Select Save as Template if this is the first time creating a campaign using the Source File Fields. Enter in a template name and select ok. A confirmation that the template was saved successfully will appear.

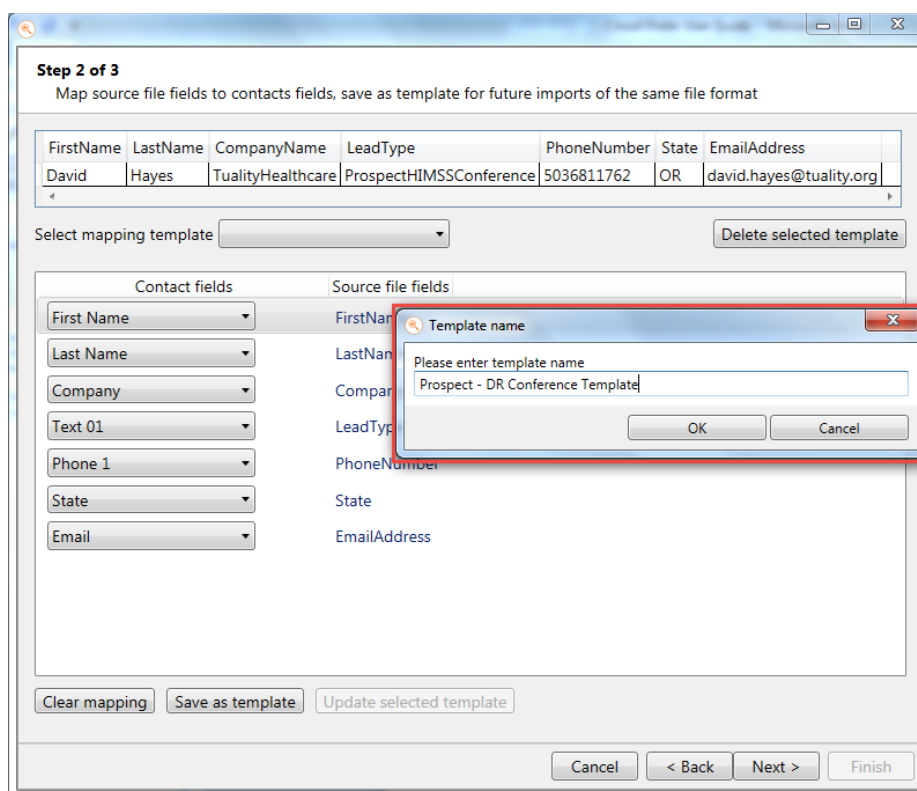


Figure 117: Contacts Import Wizard

8. Click Next.
9. The next screen will show the Source File Total Records (total contacts uploaded in the list), Total Valid Records and the Total Error Records.

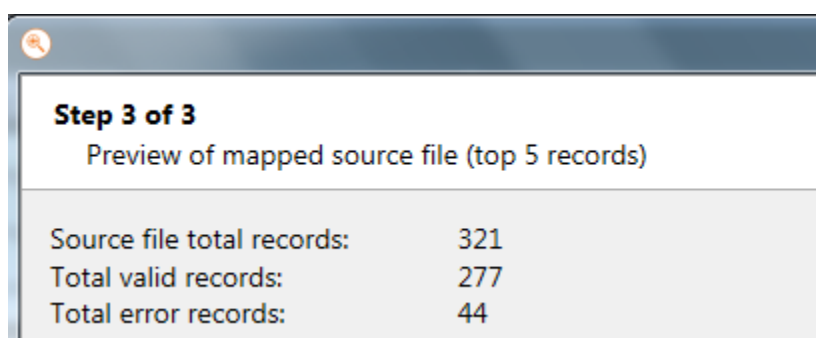


Figure 118: Contacts Import Wizard

The first list shows a sample of the valid records.

10. The second list shows the invalid records and why they are invalid.

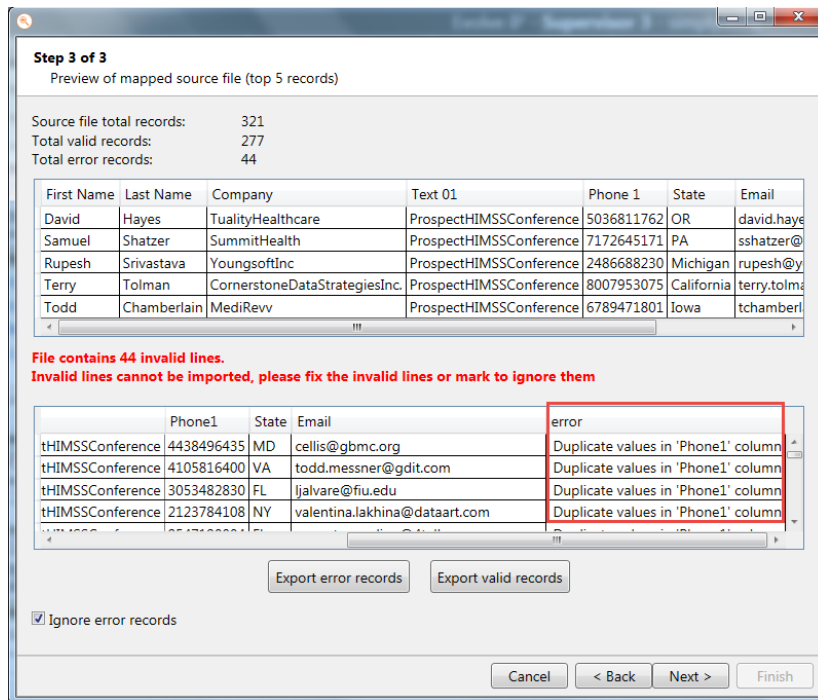


Figure 119: Contacts Import Wizard

11. To continue with the upload and ignore the errors, select Ignore Error Records.
12. Click Next.
13. An upload success screen will appear. Select Finish and return to the Supervisor Client.

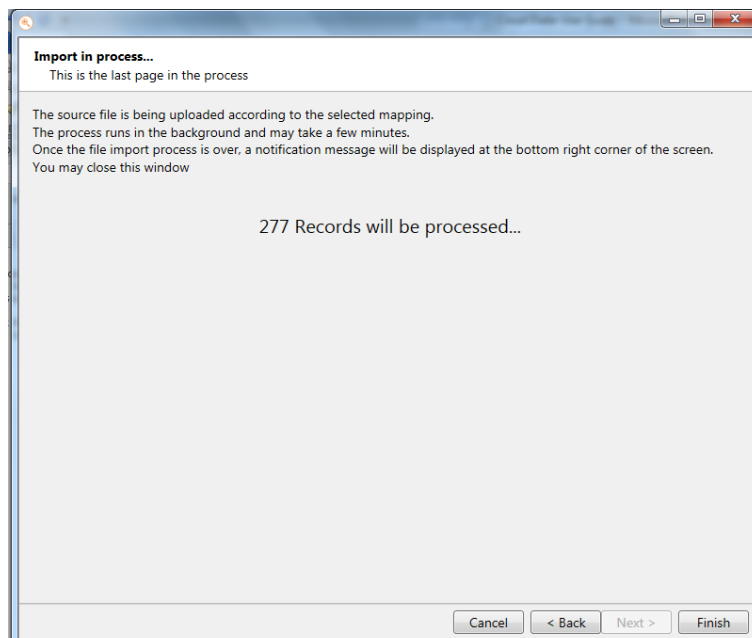


Figure 120: Contacts Import Wizard

4.5 DNC Index

The Do Not Call index allows Supervisors to manage contacts that are part of the Do Not Call (DNC) list.

The DNC list can be made up of organizational and national telephone numbers that are registered to the DNC list. It is the customers responsibility to maintain and cross-check with the National DNC list all numbers being added to their campaign lists. The organizational DNC list is maintained internally by the customer at the organization/enterprise level. The DNC list is stored at the Enterprise level and can be access for all campaigns and by all Supervisors.

4.5.1 Search and Export

Provides the ability to search for telephone numbers, active or removed, on the DNC list. These searches can be exported.

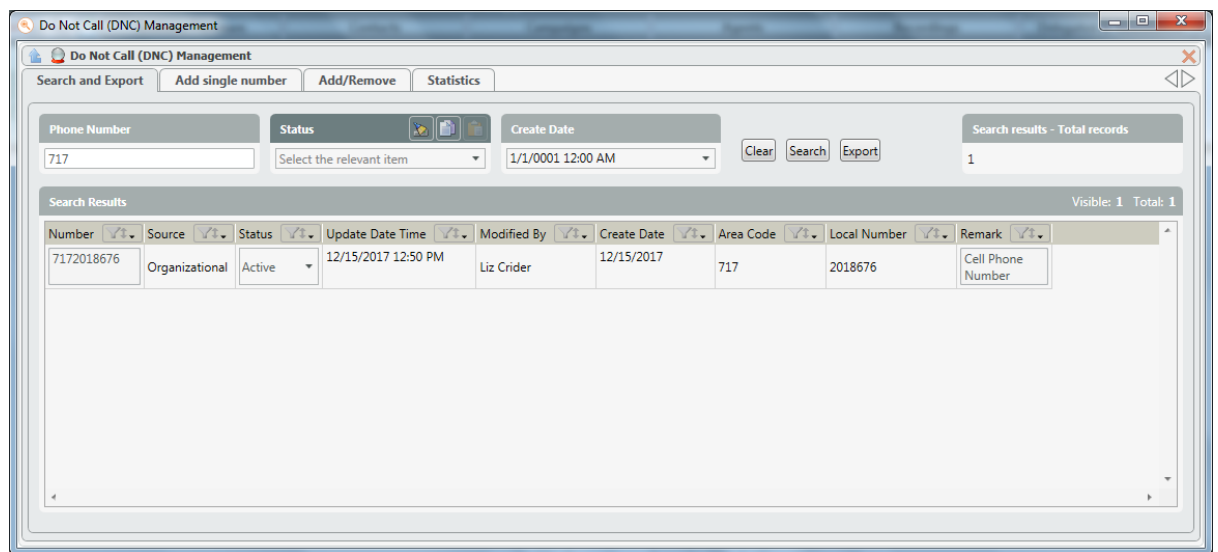


Figure 121: DNC Index

1. Phone Number – enter in the area code, full or partial telephone number to perform a search on.
2. Status – search based on the status of the phone number: Active or Removed.
3. Create Date – search by a specific date on when the number was added to the DNC.

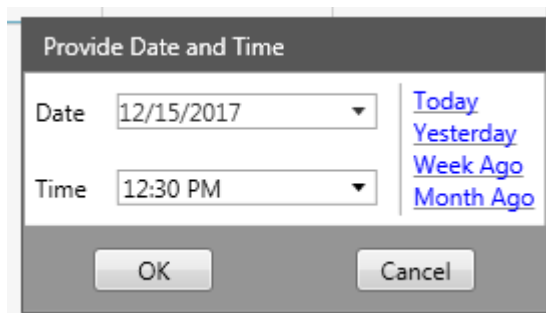


Figure 122: DNC Index

4. Clear – Clear the search results.
5. Search – search based on the criteria entered.
6. Export – Export the list of number found based on the criteria entered.
7. Search Results – Total Records – total number of records that match the search criteria .
8. Search Results –
 - a. Number – number found on the DNC list.
 - b. Source – organizational or national
 - i. National – on the National DNC list
 - ii. Organizational – number’s added to the customers internal (organizational) DNC list
 - c. Status – active or removed – If active and from the drop down, Removed is selected, the number will be removed from the DNC list.
 - d. Updated Date Time – date and time added to the DNC list.
 - e. Modified By – user that added or modified the record.
 - f. Create Date – date the contact was added to the DNC list.
 - g. Area Code – area code of the number.
 - h. Local Number – seven digit local number.
 - i. Remark – remark added to the record (if any).

4.5.2 Add Single Number

Allows supervisors to manually add entries to the DNC list. Once added it will appear under the Organization for the source of the number versus National.

Figure 123: DNC Add Single Number

1. Area Code – area code of the number.

2. Phone Number – seven digit.
3. Remark – optional remark that will show if number being added is searched in the search and export tab.
4. Clear – will reset entries and nothing will be added to the DNC list.
5. Submit – will submit the entry to the DNC list.

4.5.3 Add / Remove

Allows supervisors to bulk add or remove numbers from the DNC list.

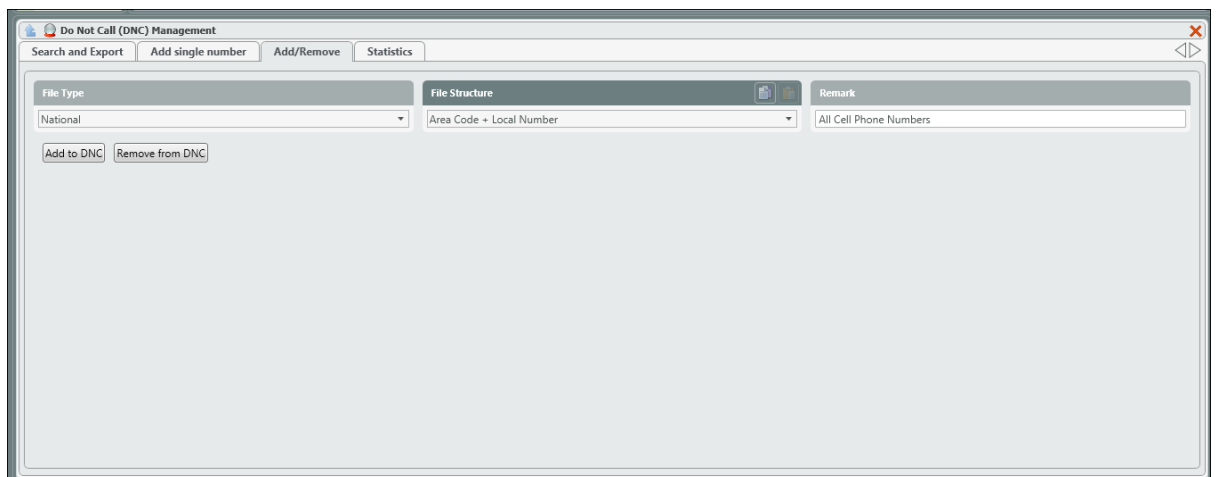


Figure 124: DNC Add / Remove

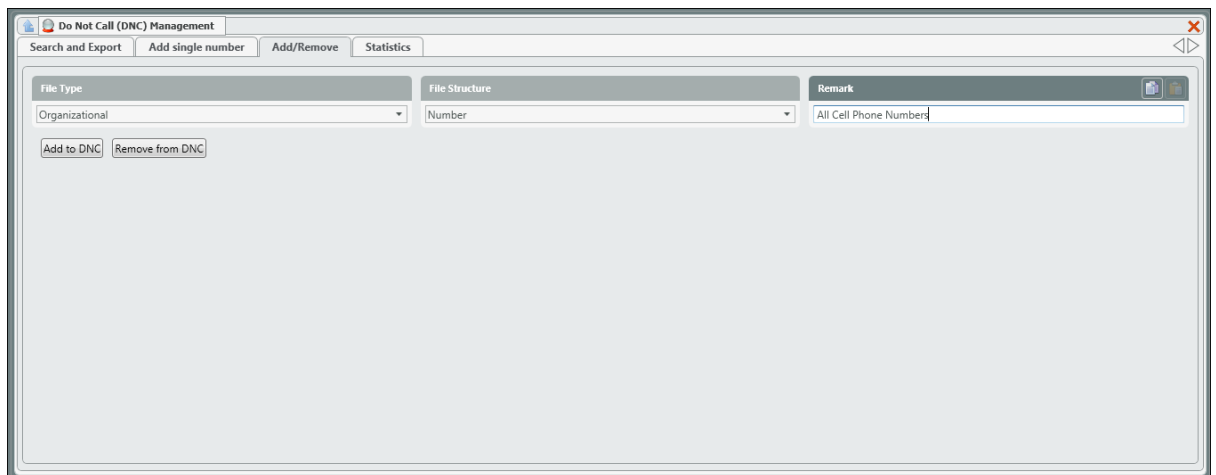


Figure 125: DNC Add/Remove

1. File Type – select which source to add the numbers too: National or Organizational.
2. File Structure -
 - a. Number – Import CSV file with a single column (headers not required) containing DNC phone numbers.

- b. Area Code + Local Number – Import CSV files containing DNC numbers split into two columns: 3 digit area code and 7 digit local number (headers not required).
3. Remark – additional remarks added to the numbers once imported.

4.5.3.1 Add Numbers:

1. Select the File Type, Structure and add any additional remarks for the numbers being uploaded.

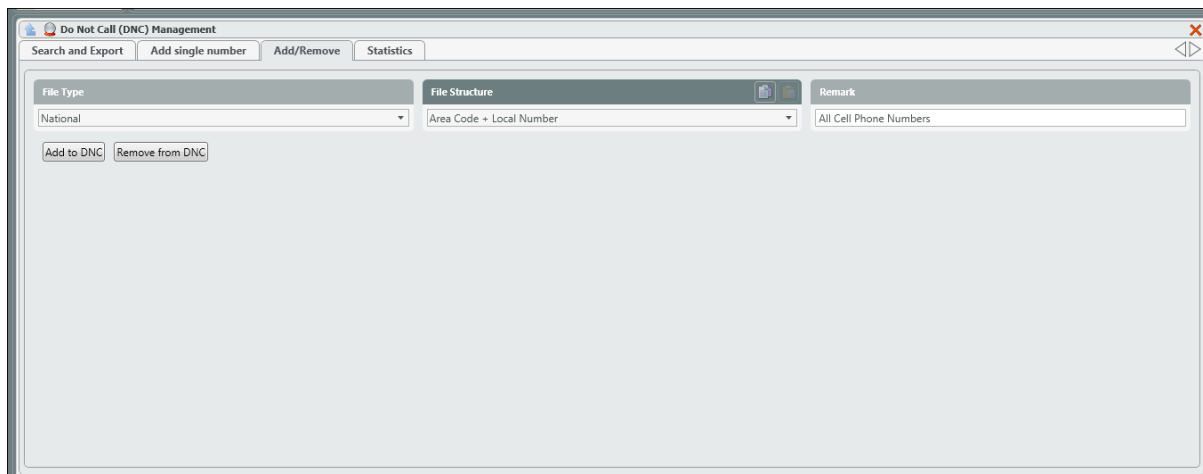


Figure 126: DNC Adding Numbers

2. Select Add to DNC.
3. Search and select the file to upload. The file being upload must be in a CSV format without headers.

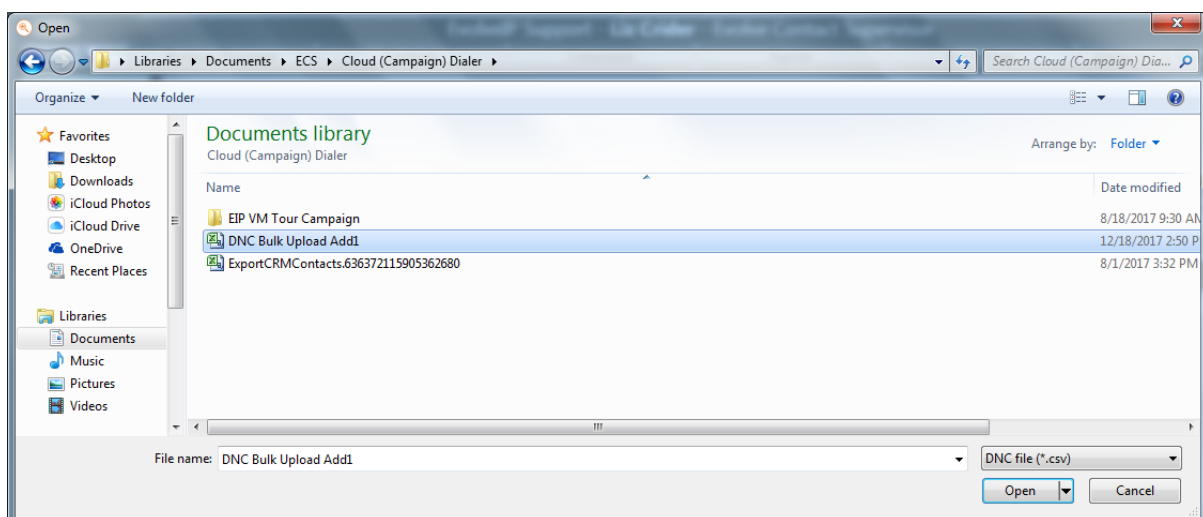


Figure 127: DNC Adding Numbers

4. A confirmation message will appear when added correctly.

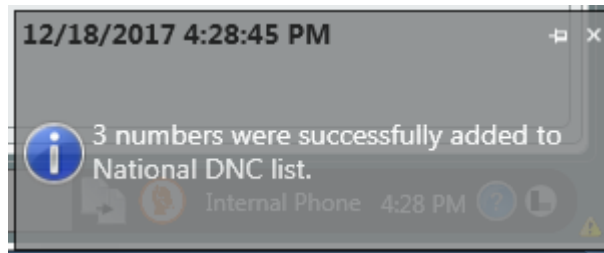


Figure 128: DNC Success

4.5.3.2 Remove Numbers

1. Select the File Type, Structure and add any additional remarks for the numbers being uploaded.

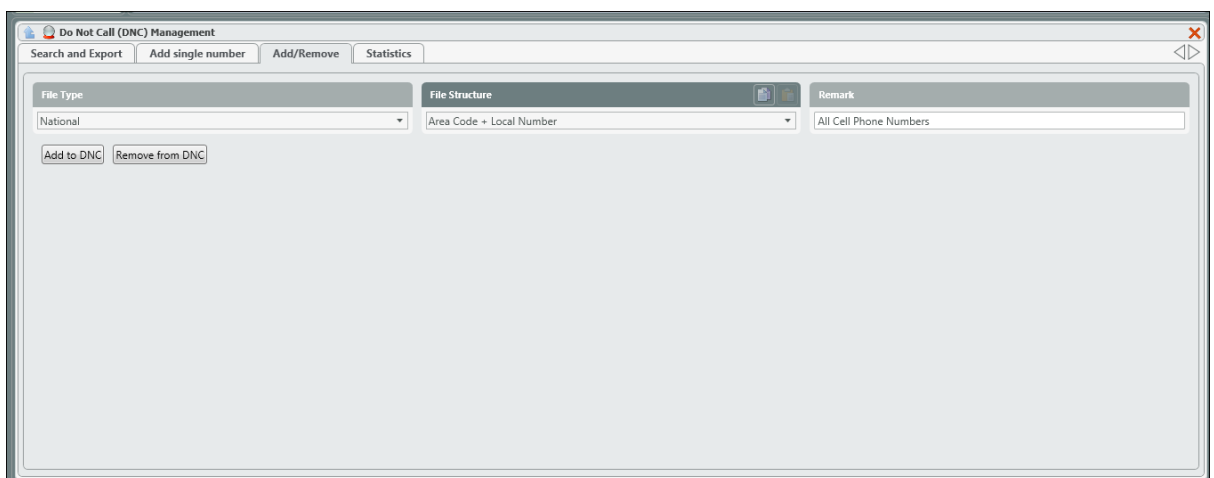


Figure 129: DNC Removing Numbers

2. Select Remove from DNC.
3. Search and select the file of numbers to be removed. The file being removed must be in a CSV format without headers.

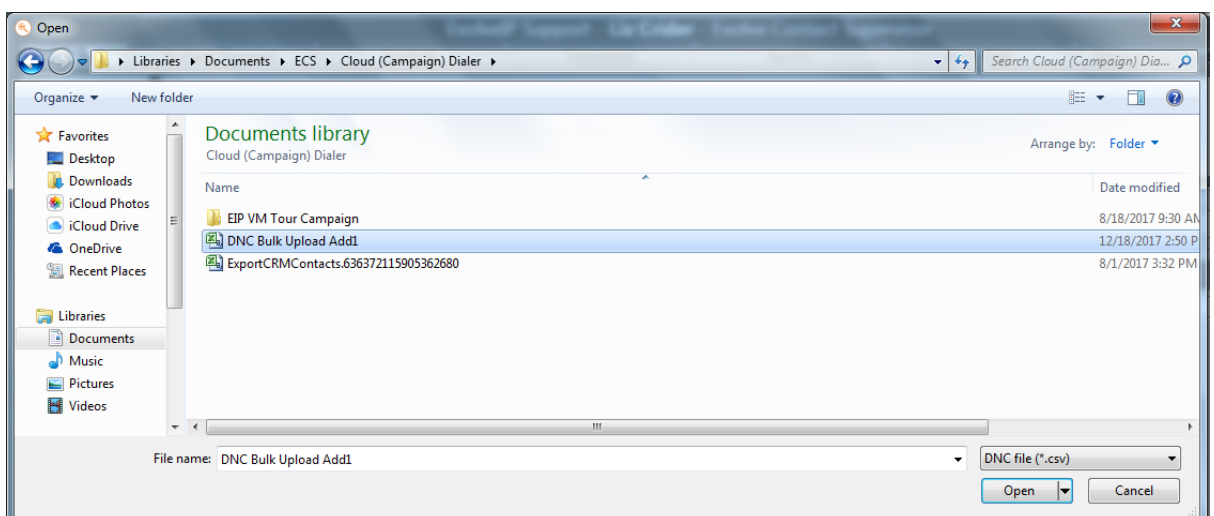


Figure 130: DNC Remove Numbers

4. A confirmation message will appear when removed.

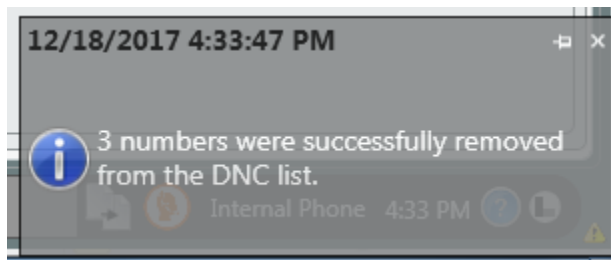


Figure 131: DNC Remove Numbers

5. Within the search and export tab, search for the numbers and they will show up in the search results with a “removed” status.

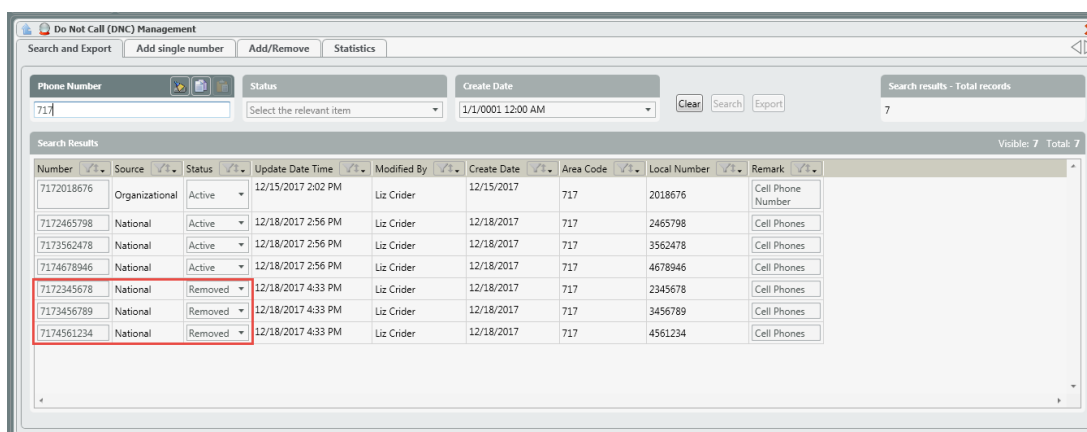


Figure 132: DNC Removing Numbers

4.5.4 Statistics

Shows the total number of records that have been added to the DNC both organizationally and nationally, as well as the last time the list has been refreshed.

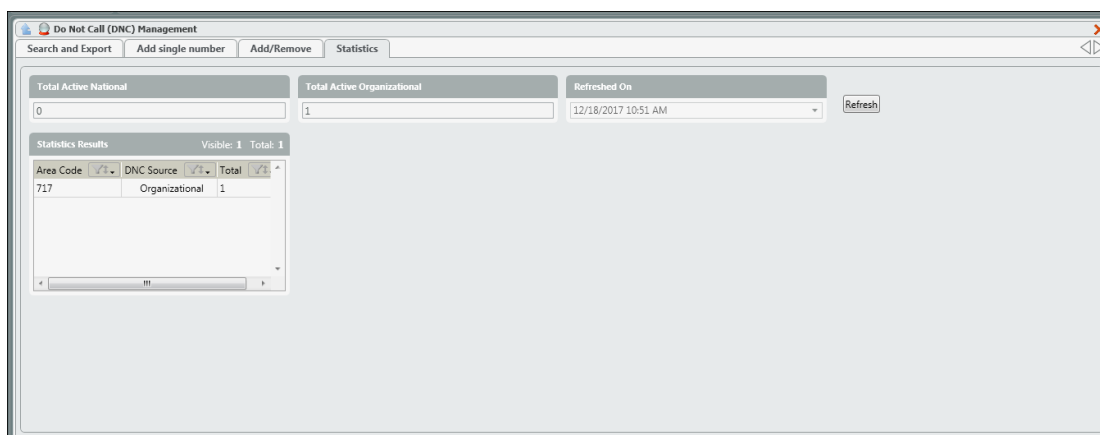


Figure 133: DNC Statistics

1. Total Active National – total number of records that are currently active and part of the National DNC list.

2. Total Active Organizational – total number of records that are currently active and part of the Organizational DNC list.
3. Refreshed On – last date and time the DNC total active count was refreshed or updated.
4. Statistics Results –records that were added to the DNC list when refreshed.
5. Refresh – select the refresh button to update the page and see if any new records have been added DNC list.