

ECS Supervisor Client

Quick Reference Guide

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ECS Supervisor Client: Interface

	2				Evolve II	^{>} - Supervi	sors							
# 1 "	Business Processe	s	Con	tacts	Camp	oaigns		Agents		Recordings	Delegated	& Abandoned	DNC	
Delegations 2 Campaigns (Recordings 5	0 4 0.0%	≥ 0 ∛ 0 nical Sup	2 0 ≥ 00:0		20 30 v O 20 v Se	2 0⊘ 00:00rvice	20 300000000000000000000000000000000000	2 0 2% ∛ 0 Billing	2 0○ 00:00	J.0%	o	0:00		
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Susiness Proce	sses												Visible: 9 1	otal
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Auto Dialers	Active	0	0	in. Del. 🗳 🖓	00:00:00	0	c. mirroc.	0	0	0	0.00 %	100.00 % 0	0	ny
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Customer Serv		0	0		00:00:00	0		0	0	0	0.00 %	100.00 % 0	0	
Data Center To	our Cam Active	0	0		00:00:00	0		0	0	0	0.00 %	100.00 % 0	0	•
Agents M														
-		_	_				_							
Supervised Age													Visible: 61 To	_
-	Assigned BP			Elps. St. Tm.	Availabili Offlin				Lst. Login Tm.	Cur. Handl. Tm.				a. []
Agent 1	Load Test, SMS and	٢	Basic	00:00:00	-			0		00:00:00	0	0	00:00:00	
Agent 10	Dial by Ext, SMS and	٢	Basic	00:00:00	2 Offlin			0		00:00:00	0	0	00:00:00	
Agent 11	Dial by Ext, SMS and	٢	Basic	00:00:00	2 Offlin			0		00:00:00	0	0	00:00:00	
Agent 12	Dial by Ext, SMS and	٢	Basic	00:00:00	2 Offlin	e 0		0		00:00:00	0	0	00:00:00	
•														+
) 🙆 11:41 A	

The Supervisor Client has six separate sections: Quick Access bar, Index Bar, Active Box, Business Process Dashboard, Work Area Window, and Supervisor Agent AppBar.

- 1. Quick Access bar Manage the display of the Dashboard, Index's 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 and 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
- c. 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, i.e how many calls reached voicemail, no answer, busy etc.
- **d.** Image: Open Individual Index's into 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. Click the button again to turn off this feature.
- 2. Index Bar All available Index's to view and monitor within the Work Area Window.
- **3.** Active Box Provides Supervisors a quick glance at 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, campagin etc. found in each index.

١	Business P	rocesse	5
	Business P	rocess	∀† -
	Auto Diale	ers	
	Billing		

- 6. Supervisor Agent AppBar Provides Supervisors the capability of interacting with Agents, contact center personnel and/or customers. This has the same usage and functionality as the Agent Client.
- 7. Agent Business Process and Campaign Assignment Provides Supervisos the ability to assign inactive agents to a business process or campaign for a set period of time.
- 8. Reporting Access to the Report Scheduler

First Time Setup

- 1. Business Process Verification Select the Business Process Index to open within the Work Area. Verify all Business Process you are monitoring are listed. Click the name of a Business Process to drill into current performance.
- **2.** Agent Verification Select the Agent Index to open within the Work Area. Verify all Agents you are Supervising are listed. Open this a second or third time to focus on teams of Agents.
- 3. Test Call Place a test call / email / webchat into a Queue. Verify:
 - a. The BP Dashboard shows an interaction is waiting.
 - **b.** The interaction is delievered to an agent .
 - c. Dashboard updates to show an Answered interaction when the agent releases the call.

Supervisor Client Setup

Supervisors should choose which KPIs to view for each Index within the Work Area Window, sort records in a different order (e.g. ascending and descending – numerically and alphabetically) or filter the records that match certain criteria.

The following KPI's are most critical:

- 1. Service Level
- 2. Calls Abandoned/% Abandoned
- 3. Calls Queued
- 4. Average Handle Time
- 5. Average Wait Time

<u>Column Selector</u>: allows for the arrangement of columns (Key Performance Indicators) in whichever order is preferable.

1. The Column Selector is in the top right hand corner of every Index view.

慉 🧕 Business Processes	Monitor 🕨											>
Business Processes 9/9												
Business Process V1.	CLBK stat. 🖓 🔭	Wait. 🕼 🗸	Wait. Def. 🖓 🖡	Long. Wait. Tm. 🛛 🖓 🗸	Intrac. In Proc. 🛛 🖓 🗣	Tot. Intrac. 🛛 🖓 🗸	Ans. Vi.	Abd. 🖓 🔭	% Abd. 🛛 🖓 🗸	SL 🗐 🗐	ASA 🗐 🗐	Handl. By Ag 🔶
Auto Dialers	Active	0	0	00:00:00	0	0	0	0	0.00 %	100.00 %	0	0
Billing	Active	0	0	00:00:00	0	0	0	0	0.00 %	100.00 %	0	0

2. When selected, a popup window will appear with the current columns selected. Uncheck the columns to remove a specific column from view and use the Move Up/Move Down options to reorder the columns. Select OK to save.

Select Columns Fo	or Busi	ness Processes
 Business Process CLBK stat. Wait. Wait. Def. Long. Wait. Tm. Intrac. In Proc. Tot. Intrac. Ans. Abd. % Abd. % Abd. SL ASA 	A E	Move Up Move Down
	ОК	Cancel

Agent Monitoring

Supervisors may perform certain quality assurance, training and monitoring activities that can be executed on any of the agents. Right-click an agent's name in the Work Area to see the shortcut menu displaying the different commands:

<u>Coach</u>: Use to view, hear and coach all interactions without alerting the customer. You might use this command to assist when training new agents.

Intervene: Use to join in the interaction with the agent and customer. You might use this command to assist agents with a complicated or problematic call.

Listen: Use to silent monitor an agent and hear or view all the interactions. You might use this command for quality monitoring and future training purposes.

<u>Coach</u>: Use to view, hear and coach all interactions without alerting the customer.



1. Right-click the agent you want to 'Coach' in the Work Area. A pop-up menu displays all the available commands.

- 2. Click Start Coach. An interaction window opens on the Supervisor's Agent AppBar indicating that Coach is in progress and the agent may be coached/trained. The Coach command icon changes to .
- 3. Right-click the agent's name in the Work Area and click Stop coaching. The Coach function is terminated and the interaction window closes.

C	Paul 🧕	00:00:47 ×	The interaction that is currently being coached by the Supervisor, with the coach time
	Туре	Incoming Telephony Handling	Indicates how long the Agent
	Entry Time	01 Aug-11 1:59:37 PM	has been busy with the call
	Origin Destination	8028852 Channel101	Click to stop the coach
	Business Process Demands	Technical Support	
	Waiting Time Remarks	00:00:04	
	Links	Customer Location Product	
	Previous Attempts Completion Status		
	Disposition Code Telephony Sessi	ons	
Supervisor		🕒 Paul 🏖 (1) 🕑	Click to stop the coach —— (Default Command)
	the current mand being — performed		nber of ions the Agent ntly handling
		The name of t Agent being coached	he

*The above image is applicable for all Agent Monitoring interactions (Coach, Intervene and Listen)

Intervene: Use to join in the interaction with the agent and customer.

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

The Intervene command icon changes to 🛄 on the Supervisor's Agents AppBar.

3. Click U to stop the Intervene command. The Intervene command is terminated and the interaction window disappears from the Supervisor's Agent AppBar.

Listen: Use to silent monitor an agent and hear or view all the interactions.

- 1. Choose which agent you want to 'Listen' to and right-click on their name in the Monitoring View area. A pop-up menu displays all the available options.
- 2. Click Start Listen. An interaction window opens on the Supervisor's Agents AppBar indicating that the Listen command is now in progress and you are able to hear the interaction.

The Listen command icon changes to

3. Click Let to stop listening. The Listen command is terminated and the interaction window disappears from the Supervisor's Agent AppBar.

<u>Note*</u> 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 and in order to get it back, the 'Retrieve' button must be used.



Change an Agent's ACD State

Supervisors can change an agent's ACD state when the agent is logged in and online. If an agent appears offline in the Agent Index, their ACD state cannot be changed.

To change an agent's ACD state right click on their name. A pop up menu will appear with all available ACD's states. Select the new ACD state.



Assign Agent to Business Processes and Campaigns

Within the Supervisor client you have the ability to temporarily assign agents to Business Processes and Campaigns. 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 removed from the Business Process assignment.

Assign Agents to Business Processes:

1. Select the Assign Agents to Business Processes and Campaigns Icon at the bottom of the Supervisor Client



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

usiness Process Campaign				
Current assignments are acc	ording to setup values			
ASSIGNMENT EXPIRATION IN HOURS:				
	ASSIGNMENTS WILL BE	E APPLIED UNTIL Dec 04, 11:31	. PM (Now it is Dec 04, 11:31 AM in EST)	
1 2 3 4 5 6 7 8	9 10 <u>11 12</u>			
BUSINESS PROCESSES	5 ACTIVE AGENTS		INACTIVE AGENTS 📀	
Technical Support	Agent 1		Liz O'connor	
	Agent 2		Agent 5	
Customer Service			Supervisor 1	
Customer Service Sales	Agent 3			
	RCAgent			
Sales		ADD AGENT		

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.

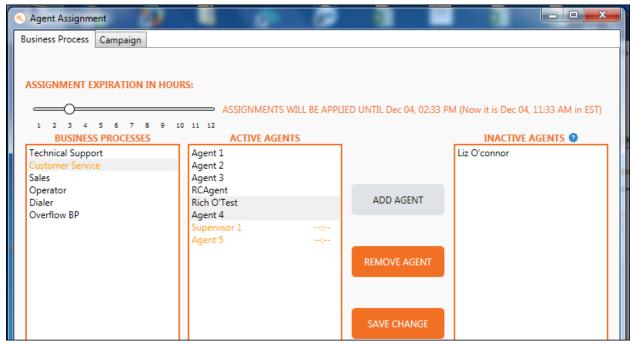
Agent Assignment	
Business Process Campaign	
Current assignments are according to setup values	
ASSIGNMENT EXPIRATION IN HOURS:	
ASSIGNMENTS WILL BE APPLIED UNTIL Dec 04, 02:32 PM (Now it is Dec 04, 1 1 2 3 4 5 6 7 8 9 10 11 12	1:32 AM in EST)

For 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 the time has run out, they will be moved back into an inactive status and will no longer receive interactions from the selected Business Process.

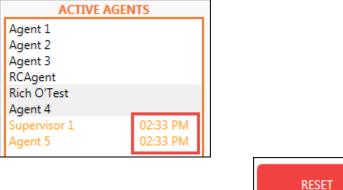
- 4. Select the Agents to be added to the Business Process.
- 5. Set the correct Assignment Expiration in Hours.
- 6. Select Add Agents

Agent Assignment						
Business Process Campaign						
Current assignments are according	to setup values					
ASSIGNMENT EXPIRATION IN HOU	ASSIGNMENT EXPIRATION IN HOURS:					
	ASSIGNMENTS WILL BE APPLIED UNTIL Dec 04, 02:33 PM (Now it is Dec 04, 11:33 AM in EST)					
1 2 3 4 5 6 7 8 9 1	0 11 12					
BUSINESS PROCESSES	ACTIVE AGENTS	_	INACTIVE AGENTS 😨			
Technical Support	Agent 1		Liz O'connor			
Customer Service	Agent 2		Agent 5			
Sales	Agent 3		Supervisor 1			
Operator	RCAgent					
Dialer	Rich O'Test	ADD AGENT				
Overflow BP	Agent 4					

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



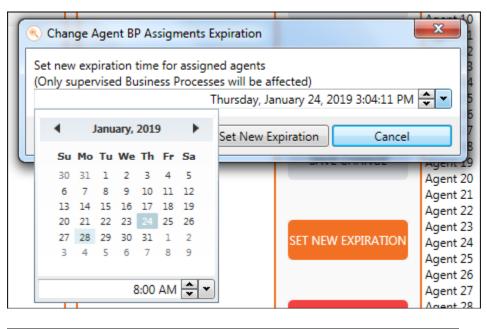
8. When the changes have been changed, you will see the time in which the agents will be moved from Active to Inactive within the queue, based on the expiration hours set.



- 9. To reset the agents back, select the *Reset*
- 10. To set a new expiration by the Hour, Day, Week, or Month, select Set New Expiration



 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.

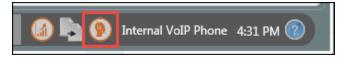


Change Agent BP Assigments Expiration	×
Set new expiration time for assigned agents (Only supervised Business Processes will be affected)	
	2019 8:00:00 AM 🔹 🗸
Set New Expiration	Cancel

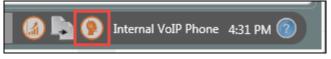
- 12. Select Set New Expiration
- 13. The Agent time will reflect the new expiration set.

Assign Agents to Campaign:

The Assign Agent to Business Process and Campaigns Icon allows Supervisor to manage the agents assigned to receive calls from each Campaign. The list of agents available is pulled from the Business Process the Campaign is assigned.



1. Select the Assign Agents Icon at the bottom of the Supervisor Client



2. Select the Campaign Tab

TIOUUCU		ontact supervisor	
Agent Assignment	anarian.	April 1	
Business Process Campaign			
Current assignments are according	to setup values		
ASSIGNMENT EXPIRATION IN HOU	JRS:		
	ASSIGNMENTS WILL BE APPL	IED UNTIL Nov 14, 04:40 AM	1 (Now it is Nov 13, 04:40 PM in EST)
1 2 3 4 5 6 7 8 9	10 11 12		
BUSINESS PROCESSES	ACTIVE AGENTS		INACTIVE AGENTS 🔞
Technical Support			
Customer Service			

3. This will provide you with a list of all currently created campaigns within the Supervisor client.

FIUUUCILAD	- SUPELAISOL T - FAOIAG	CONTRACT SUPERVISOR	
Agent Assignment	and the second s	- Arrite	
Business Process Campaign			
Assignment Duration:			
Permanent Temporary			
ASSIGNMENT EXPIRATION IN HOUR	8:		
		LIED UNTIL Nov 14, 04:42 AM	M (Now it is Nov 13, 04:42 PM in EST)
1 2 3 4 5 6 7 8 9 10	0 11 12		
CAMPAIGNS	ACTIVE AGENTS	-	INACTIVE AGENTS 📀
Appointment Follow Up New Client			
		ADD AGENT	
		REMOVE AGENT	
		SAVE CHANGE	
		SAVE CHANGE	
		SET NEW EXPIRATION	
		RESET	

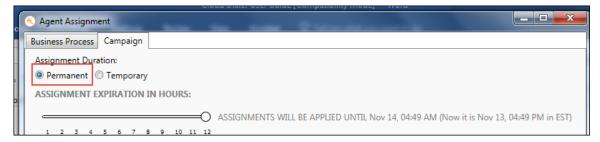
4. Clicking on a campaign will provide you with a list of agents that are currently active and available to take calls from that campaign.

-							
,0	S Agent Assignment						
	Business Process Campaign						
	Assignment Duration:						
2	O Permanent 💿 Temporary						
0	ASSIGNMENT EXPIRATION IN HOURS:						
1	ASSIGNMENTS WILL BE APPLIED UNTIL Nov 14, 04:43 AM (Now it is Nov 13, 04:43 PM in EST)						
L	1 2 3 4 5 6 7 8 9 10 11 12 CAMPAIGNS ACTIVE AGENTS INACTIVE AGENTS						
Ш	Appointment Follow Up Agent 1						
	New Client Agent 3 Agent 2						
	ADD AGENT						

- 5. Within the active/inactive agents column there are two options to manage the agents:
 - a. **Temporary Assignment Duration** temporarily removes the agent from the campaign assignment. Set a time assignment expiration so the agent will automatically be placed back into the campaign as an active agent when the time limit expires.

Cioud Dialei Osei Guide [Compatibility Mode] - Wold
S Agent Assignment
Business Process Campaign
Assignment Duration: Permanent Temporary
ASSIGNMENT EXPIRATION IN HOURS:
O ASSIGNMENTS WILL BE APPLIED UNTIL Nov 14, 04:48 AM (Now it is Nov 13, 04:48 PM in EST)

b. **Permanent Assignment Duration** – permanently removes the agent from the campaign until the agent is manually placed back into the active agent's column.



6. Temporary Assignment Duration:

- a. Select the Campaign and Agent you wish to remove temporarily from the campaign. Ensure that the Temporary Assignment Duration is selected.
- b. Select Assignment Expiration in Hours for the agent. You will see the Assignment will be applied until (x) will be updated to showcase when the agent will be placed back in the queue.

Agent Assignment	Caracture .	- April	
Business Process Campaign			
Assignment Duration:			
Permanent Temporary			
ASSIGNMENT EXPIRATION IN HOU	85:		
	ASSIGNMENTS WILL BE APPLI	IED UNTIL Nov 15, 02:31 PN	(Now it is Nov 15, 09:31 AM in EST)
CAMPAIGNS	ACTIVE AGENTS		INACTIVE AGENTS 2
Appointment Follow Up	Agent 1		
New Client	Agent 3 Agent 2		
	(hyth) 2	ADD AGENT	
		REMOVE AGENT	
		SAVE CHANGE	

- c. Select Remove Agent.
- d. The Agent will be moved from the active to the Inactive Agents column. Select Save Change.

Agent Assignment	Lange Sec.	-	
Business Process Campaign			
Assignment Duration:			
Permanent Temporary			
ASSIGNMENT EXPIRATION IN HOU	85:		
	ASSIGNMENTS WILL BE APP	LIED UNTIL Nov 15, 02:33	PM (Now it is Nov 15, 09:33 AM in EST)
	ACTIVE AGENTS		INACTIVE AGENTS 📀
Appointment Follow Up New Client	Agent 3 Agent 2		Agent 1:
		ADD AGENT	
		REMOVE AGENT	
		SAVE CHANGE	

e. When the changes are saved the inactive agents time will be updated to show when they will be placed back into the active agents column to start receiving calls again from the campaign.



7. Permanent Assignment Duration:

a. Select the Campaign and Agent you wish to permanently remove from the campaign. Ensure that the Permanent Assignment Duration is selected. The Assignment Expiration Hours will no longer be available.

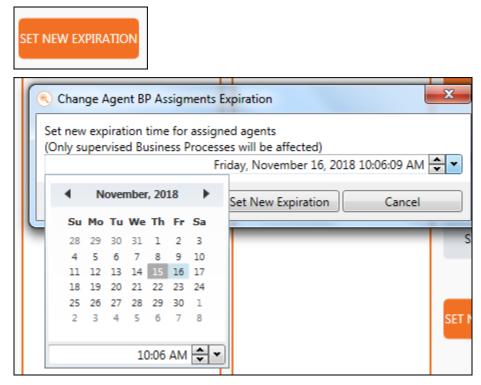
Agent Assignment	- Sector	- April	
Business Process Campaign			
Assignment Duration:			
Permanent			1
ASSIGNMENT EXPIRATION IN HOU	RS:		
1 2 3 4 5 6 7 8 9 1	_	LIED UNTIL Nov 15, 09:45 PM	I (Now it is Nov 15, 09:45 AM in EST)
CAMPAIGNS	ACTIVE AGENTS		INACTIVE AGENTS 📀
Appointment Follow Up	Agent 1		
New Client	Agent 3		
	Agent 2	ADD AGENT	
		REMOVE AGENT	

- b. Select Remove Agent
- c. The Agent will be moved from the Active to the Inactive Agents column. Select Save Change.
- d. The agent will be saved as an inactive agent and no longer receive calls from the campaign until manually moved back as an active agent.

IN	ACTIVE A	GENTS 🔮	
Agent 3			

8. Set New Expiration

The set new expiration allows you to set a new expiration time for agents that have been temporarily assigned to the inactive column of a campaign. Selecting the New Expiration tab will allow you to select a new time and even day for the agents expiration.



9. Reset

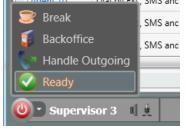
Reset allows for the reset of all agent assignments back to their original state.

Supervisor Agent AppBar

The Supervisor Agent AppBar allows you to communicate with other agents or supervisors, place out outbound calls, manage agent monitoring activities, and handle queued calls if necessary. It has the same usage and functionality as the Agent Client.

Utilizing the Supervisor Agent AppBar

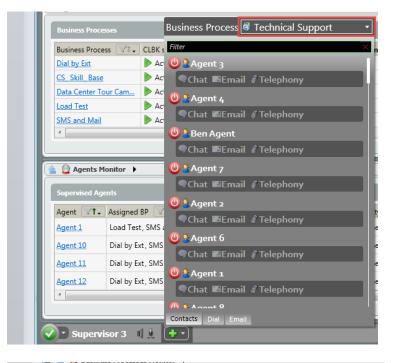
1. To utilize the Supervisor Agent AppBar, the Supervisor state needs to be set to Ready -



2. Once your state is set to ready, you can access the directory and dial pad



3. From the directory you will be able to initiate a call or chat with another agent or supervisor. You can filter agents and supervisors by Business Processes.



	esses				
Business Proc	ess 🔽 🕶				
Dial by Ext		Ac	🖸 Dial		C
CS_Skill_Base		Ac	1	2 авс	3 DEF
Data Center T	our Cam	Ac	4 GHI	5 JKL	6 1010
Load Test		Ac 📃			
SMS and Mail		De 🥑	7 PQRS	8 TUV	9 WXYZ
•		_	*	0 +	#
Supervised Ag	jents				
	jents	BP 🔽			
Supervised Ag	jents				
Supervised Ag	ents Assigned	t, SMS a			
Supervised Agent Magent 1	ents Assigned Load Tes	t, SMS a xt, SMS			
Supervised Ag Agent 1 Agent 1 Agent 10	Assigned Load Tes Dial by E	t, SMS a xt, SMS xt, SMS			
Supervised Ag Agent 1 Agent 1 Agent 10 Agent 11	Assigned Load Test Dial by E Dial by E	t, SMS a xt, SMS xt, SMS			