Evolve IP – OCC Webadministrator User Manual

PROPRIETARY AND CONFIDENTIAL
VERSION: 1.0

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1. Introduction

This user manual describes the OCC Webadministrator features.

The manual serves as a concise reference source for using Webadministrator's abilities. Should you wish to have extended training please get in touch with Evolve IP on 088-4283111.

1.1. Logging in

Open the browser and go to: https://web.occ7.mtel.eu/webadministrator

Enter the username in the log-in screen which appears. The Webadministrator username is provided in the delivery letter. The username format is made up in the following way:
<adminname>@<companyname>.occ7.mtel.eu

Then enter the password associated with Webadministrator and provided in the delivery letter.

Note: when the web agent is launched for the first time, you must log in with a username with local administrator rights for the PC.

1.2. Creating a new password

It's also possible to change a password through Webadministrator; see Chapter 3.

1.3. Preparations

Proper preparation is needed before the screens and fields in Webadministrator can be completed. This means it is important to have an overview of the agents, and to indicate for each agent which group, skills and teams they must be added to.

2. Administrator user screens

The screen below is displayed after logging in, where your own company name is shown instead of DefaultTenant.
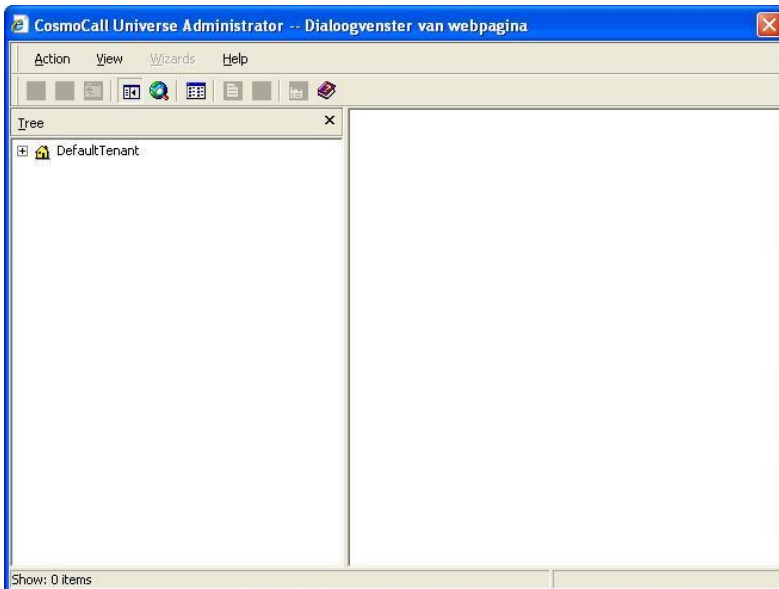
When you click the plus-sign next to your company name, the screen below will appear:
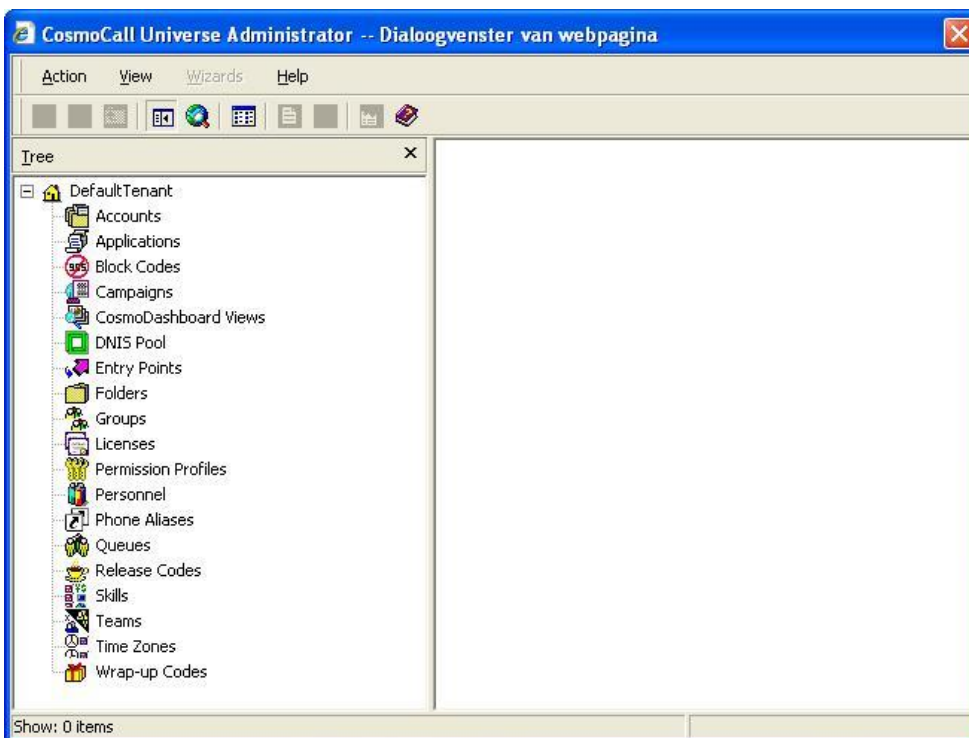
In this screen you will find all the functions needed to create agents, queues, skills etc., and to modify the settings to suit your own preferences.

2.1. Features definition

You can organise the accessibility and authorisation structure of your company through Webadministrator.

Webadministrator is a powerful tool. Modifications as indicated in the bold-faced section can cause the organisation or department to become inaccessible. We advise that you do not make any changes here. Should you want to make any changes, this can always be done in consultation with Evolve IP. You cannot change the sections marked in bold.

Do bear the following in mind: created skills, queues and groups must match the defined skills in the IVR.

A brief explanation of the options follows below:

Accounts:
Top-level, no configuration options.

Applications:
The application as built by Evolve IP, and reference to the IVR.

Block Codes:
Block codes can be used to block series of numbers, e.g. 0900 numbers. When the block codes are linked to a user, this user cannot call 0900 numbers. If you wish to add block codes, you must create them without the initial 0. So if you want to block calling 0900 numbers, you must enter 900.

Campaigns:
Outbound call centres can define campaigns; see Chapter 6 for further explanation.

CosmoDashboard Views:
The self-created Realtime Reports in the CosmoDashboard are indicated in the admin in this section. The name of the dashboard view can be modified, and you have the ability to share the view with other supervisors.

DNIS Pool:
Here you will see an overview of the (service) numbers connected to the OCC-IVR.

Entry Points:
The Entry Points are the connection points to the 'System' tab in the agent interface. Example: in the first menu the caller chose 1, and in the second menu 4, but should have chosen 5. An agent can now redirect a caller to menu 2 option 5.

Folders:
The folder contains various folders with the e-mail addresses associated with them. A company may possess multiple e-mail addresses to which different questions on specific topics may be routed.

Groups:
In Groups a division may be made between departments or organisation, for example. An agent must be a member of a group, and can only be a member of a maximum of 1 group.

Licences:
In Licences Evolve IP has configured the licences for the various features you have purchased.

Permission Profiles:
Alongside the profiles of the web agent, supervisor and web administrator, specific profiles can also be defined for other employees; see also Chapter 8 for a detailed explanation.

Personnel:
New users can be created through Personnel; see Chapter 3 for further explanation.

Phone Aliases:
A Phone Alias can be indicated. The agent calls a customer and the customer sees a particular number which has been defined here. This option is available, but in practice it may not be set as a consequence of Opta regulations.

Queues:
Queues can be defined through Queues; this generally matches the groups.

Release Codes:
The Release Codes are the reasons that an agent switches to release (unavailable). For example: lunch, meeting, sick etc.

Skills:
The calls are routed on the basis of the Skills. A call is not routed on the basis of the telephone number. For instance based on language or expertise area.

Teams:
Alongside the Group and Skill definition, various Teams can be created. Specific rights can be assigned to a team.

Time Zones:
With Time Zones you can define different time zones independently. You can use Time Zones when you have multiple locations where a call centre is localised.

Wrap-up Codes:
The Wrap-up Codes are the closing codes for the telephone conversations. For example: fault, information provided, forwarded internally etc. We advise defining a maximum of 15. These Wrap-up Codes can be set per queue.

3. Create new user

By clicking **Personnel** in the left-hand section of the administrator, in the right-hand side of the screen you will see all the agents, supervisors and administrators which have already been created.

Perform the following steps to create a new user:
· Right-click Personnel.
· Click the top option, <u>New</u>.

You will now see the screen shown here on the left. Complete the following fields; those with a * are required:
1. Login ID*; enter the username of the agent /supervisor/ administrator.
2. Click the '**Set password**' button; a self-chosen password can be entered here.

A new password must meet the following criteria:
1. The password must consist of at least 7 characters.
2. The password must contain a combination of characters from at least 3 of the following 4 groups: uppercase letters, lowercase letters, numbers and symbols.
   · The last 24 previously-used passwords may not be re-used.
   · The username may not be used as a password.
   · A password is valid for a maximum of 90 days.
3. First name*; enter the first name of the new user being created.
4. Last name*; enter the surname of the new user being created.
5. Description; if you wish, a specific comment can be noted.
6. Profile; click the Change button to indicate whether the account must be an agent, supervisor, administrator or both.
7. E-mail Address; generated automatically based on the '**Login ID'** and your domain name.
8. Group; click the Change button to assign the user to a group. <u>A user must always be linked to one group.</u>
9. Skill; click the Change button to assign a skill to the user. <u>One skill must always be assigned to a user.</u> A new user must always have the Defaultskill. This means that an error call always goes to an agent and will not be lost. If an IVR is included in OCC, an incoming call is routed to a skill via a Group on the basis of the routings in the IVR.
10. Team; click the Change button to add the user to a team.
11. Block long-distance calls; long-distance calls are excluded by default at a different level. This means it is not possible to initiate such calls with OCC.
12. Block Codes; you can select Block Codes created for each agent. These restrict the agent from making various types of calls. For instance calling service numbers.
13. Max message streams; you can determine per agent when taking chat, how many chatcalls an agent can handle at the same time.

14. Phone ANI; the telephone number can be set here which will be communicated externally with outgoing calls by the VCS as the number from which the call originates.
15. Caller ID; here a numeric ID/telephone number can be set which will be communicated externally with outgoing calls by the VCS as the number from which the call originates.
16. DNIS; (Dialled Number Identification Service); here a telephone number can be set which will be visible to the recipient of the call as the number being used by the agent.
17. Licences; this indicates which licences you are using.
18. Parameters; the various parameters can be changed per agent.

Parameters
Below is an explanation of the contents and possibilities per parameter.

Auto Release on Call Pickup
·   If this option is set to '**On**', then the agent himself must re-set to available manually after completing each call.
·   If this option is '**Off**', the status is automatically re-set to available again after answering and entering the wrap-up code.

Auto Release on Ring Timeout
If an agent is called but does not answer it or rejects it, a Ring Timeout follows automatically.
1. When this option is set to '**On**' the agent will automatically be set to unavailable status. The agent is apparently unable to answer the call.
2. If this option is '**Off**', the agent status remains on available.

The parameters below are only applicable if a connection with an external CRM application is used.

CRM URL
Here one can enter the URL of the CRM application used by this agent.

CRM User ID
Here the user ID can be entered for the CRM application used by this agent.

CRM Password
Here the password can be entered for the CRM application used by this agent.

Block Agent-to-agent calls
This parameter can be used to block calls between agents
in the call centre.

Block Xfer/Conf to agent
This parameter can be used to block redirecting and setting up conference calls to other agents in the call centre.

Block Call/Xfer to system
This parameter can be used to block redirecting to the system, e.g. to another queue.

Preferences edit by Agent
This parameter can be used to give the agent permission (allow) to indicate himself which type of headset is being used, under the Preferences option in the agent screen.

Area code

010 must be entered here, the area number of OCC's calling location. Once this number has been entered, it will be copied automatically by the agent and it is not necessary to enter it manually.

Country code

31 must be entered here, the country number of OCC's calling location. Once this number has been entered, it will be copied automatically by the agent and it is not necessary to enter it manually.

Voice device type

Here you can indicate which type of Voice device the agent is using. Use SIP here for an IP telephone or a (USB) headset, and Voice device when a telephone with its own telephone number is used.

Voice device address

If another telephone is used to receive OCC calls, the telephone number must be entered here. If an IP telephone is used, the IP address of the IP telephone must be entered here.

Automatic answer

With this parameter you can indicate whether the agent must click actively on the 'Answer' button when a call comes in, or whether this must happen automatically.

Agent can change password

With this parameter you can indicate whether an agent may change his own password.

External e-mail address

With this parameter an e-mail address can be entered to route the recorded voicemail messages and e-mails of this agent to an external e-mail address.

Once all the fields have been completed, click the OK button to confirm/save the changes.

NOTE! Agents may not be re-used, e.g. by adapting the name. Users must always be created from scratch.

4. Creating queues

Under **Name** enter the **name** of the new **Queue**. **Note!** After being created, a name may not be changed. It must be deleted and then created afresh if you want to make any changes to the name.

Note! A queue name may not contain any special characters or spaces. It is however permitted to use an _ (underscore).

Under **Description** you may enter a **brief description** of the queue if you wish.

Under **Primary in Groups** you can indicate which group(s) should initially take the calls. Click **Change** and **select** the desired group(s) and click **OK**.

Under **Secondary in Groups** you can indicate which group(s) should serve as **back-up** and take calls from this queue when agents from the Primary Groups are **not available**. Click **Change** and **select** the desired group(s) and click **OK**.

You must then assign **Skills** to the **queue**. Here you indicate which **skills are needed** to take calls from this queue. Select one or more skills by clicking **Change** and selecting the desired **skill(s)**, and click **OK**.

Under **Pick-up** you indicate in seconds how long a call may ring for an agent before it is offered to another agent with the same characteristics. If you enter 10 seconds here, the telephone will ring for a maximum of 10 seconds with an agent, before the call is offered to another agent. Under **Wrap-up** you indicate how much time an agent has to enter a wrap-up.

Under **Wrap-up Codes** you indicate which wrap-up codes the agent must see or may choose when he or she has completed a call from this queue. Click **Change** and **select** the desired wrap-up codes you have created, and click **OK**.

By **ticking No wrap-up** you can determine whether calls from this queue must be completed with a wrap-up or not. A tick means no wrap-up.

For the **Service Level (%)** you must indicate the **minimum** number of calls as a percentage, which must be answered within the **TQoS**. An **industry standard is 80/20**. 80% of the calls must then be answered within 20 seconds. In that case you would enter 80 here. **TQoS (sec)**, here you must indicate the number of seconds within which an agent must answer the call.

You can use the **Agent Selection Rule** if you have both **experienced** and **inexperienced** employees in your contact-centre. If you choose **Skill neutral** then the call will be offered **at random** to agents working in the queue. If you choose **Least skilled** the calls will be offered first to the least experienced agents. If you choose **Most skilled** the calls will be offered first to the most experienced agents.

Note! The skill level must have been indicated per agent in the administrator. This can be done using Weighting through creating a new agent. Once all the steps above have been taken and have been entered correctly, you can close the screen by clicking **OK**.

Note! Your tenant is always delivered with a default skill and a default queue. Under no circumstances may either be deleted from Webadministrator. Both components are needed as fall-backs for the system if at any given moment it does not know where to route calls.

5.   Creating groups

To be able to create new groups, you can return to the start screen and right-click Groups.

In creating a group you may indicate for multiple agents simultaneously which queues are applicable, and certain variables may be entered. The characteristic of an agent takes precedence over the characteristic of a group.

· **Name**: this is a required field; enter a clear name here for the group you are going to create. **Note! A queue name may not contain any special characters or spaces. It is however permitted to use an _ (underscore).**
· **Description**; here a more extensive description may be entered.
· **Members;** click the **Change** button**.** A screen now appears with which specific users can be assigned to this Group.
· **Primary Queues**; click the **Change** button**.** A screen now appears with which the queues with the highest priority can be assigned to this Group (incoming telephone calls).
· **Secondary Queues**; click the **Change** button**.** A screen now appears with which the queues with a lower priority can be assigned to this Group. Here too the groups may be concluded for setting up international, 'long-distance' or even local calls.
· **Block international calls:** To block the possibility of setting up international calls.
· **Block long-distance calls:** To block long-distance calls.
· **Block local calls:** To block the possibility of setting up local calls.
· **Block codes**: click the Change button. A screen now appears to block outgoing calls to, e.g., paid service numbers.
· **Folders;** click the Change button**.**

6.　　Creating or changing campaigns

Creating campaigns only applies if you want to launch an outbound campaign. Once the users and groups have been created, it is possible to create campaigns.

Name; required field, the name which will be given to the campaign here, is the same name which must be indicated later in the Softdial Campaign Manager, and corresponds with the name of the Excel sheet to be imported. Note! A campaign name may not contain any special characters or spaces. It is however permitted to use an _ (underscore).

Description; here a more extensive description may be entered.

Application; click the Change button. A screen now appears in which you indicate which (IVR) application is active for this campaign. If no separate application is used for this campaign, enter DefaultApplication.

Phone ANI; click the Change button. You can enter a telephone number, so that the recipient can see the telephone number from which the campaign is called.

Parameters:
Detection Type; there are a number of options to filter telephone numbers being called by answer-machine, fax-machine etc. These calls will then not be offered to the agent.
No Detection; no filter is applied.
Fast detection; only filters answer-machines.
Full detection; filters answer-machines and fax-machines (this option requires more time).

Detection Type:
In Webadministrator you can set per campaign whether you wish to use voicemail detection. If you right-click one of the campaigns you have the option of setting the detection type under Properties. You may choose between fast and full detection.

Fast detection: only checks for answer-machines. Measures the time between dialling and the media stream.

Full detection: checks for both answer-machines and voicemail. Measures the quantity of speech in a specific time. This method needs longer to make a determination.

Detection Timeout (ms)
This is set by default at 3000 ms and should not be changed unless indicated by the supplier.

Abandon Timeout (ms)
Here you can indicate how long the dialler must wait if it appears that no agents are available. For an extensive description we refer you to the Dialler Configuration Manual.

Caller ID
You can also enter a telephone number here, so that the recipient can see the telephone number from which the campaign is called.

Abandon Script
A script can be entered here for abandoned calls.

Area code
010 must be entered here, the area number of OCC's calling location.

Country code
31 must be entered here, the country number of OCC's calling location.

Mode
Here you can indicate the way in which the campaign calls are offered to the agents:
1. *Predictive:* Calling out occurs entirely automatically. While a call is being set up, the agent sees information about the record.
2. *Preview (open):* the agent can see who is being called, and has the choice of answering or rejecting the call.
3. *Preview (closed):* the agent can see who is being called, but does not have the choice of rejecting. The agent has a set number of seconds to view the record before the number is called.

Preview Timout (ms)
Here you indicate how much time the agent has to prepare the record before the dialler sets up the call. You must set the preview time in milliseconds. The advice is to set 10,000 milliseconds (= 10 seconds).

OnHold Script
Here the OnHold Script can be activated or deactivated if a Hybrid Agent is used. An 'Onhold while in Queue' script must be configured per campaign. This makes the 'abandoned timeout' 4 to 5 seconds longer.

Once all the fields have been completed, click the OK button to confirm/save the changes. After this the campaign must be furnished with data through an SQL server, and it must be uploaded to the Dialler. The Dialler can be configured further with the Softdial Campaign Manager.
For an extensive description we refer you to the manual: 'Outbound Dialling User Manual'.

Setting Pick-up timeout

When a call is offered to an agent but for whatever reason it is not picked up, the call is offered to an agent who is also linked to this queue and is available. You can set this pick-up time. You do however have to take account that under the surface, the system still needs time to pursue a call. You should increase the value you want to enter here in seconds, by 25%. If you want the call to be offered to another agent after 20 seconds, then you should enter 25 seconds as the pick-up time.

7. Assign weighting to agents

You can assign weighting to agents in the administrator. You choose this when you have agents who have more knowledge and skills than other agents with the same skill. With the weighting you indicate which agent within the skill is the most or least suitable to take calls from a specific queue. If you indicate that agent X is more suitable than agent Y to take a helpdesk call, the call will first be offered to agent X.

Here the skills, queues and personnel settings options must be modified in the administrator.

In the administrator, go to skills and select a skill to which you wish to assign a weighting. By default the 'Allow weight' field is set at 'false' (out). Go to Properties to modify the properties of the skill.
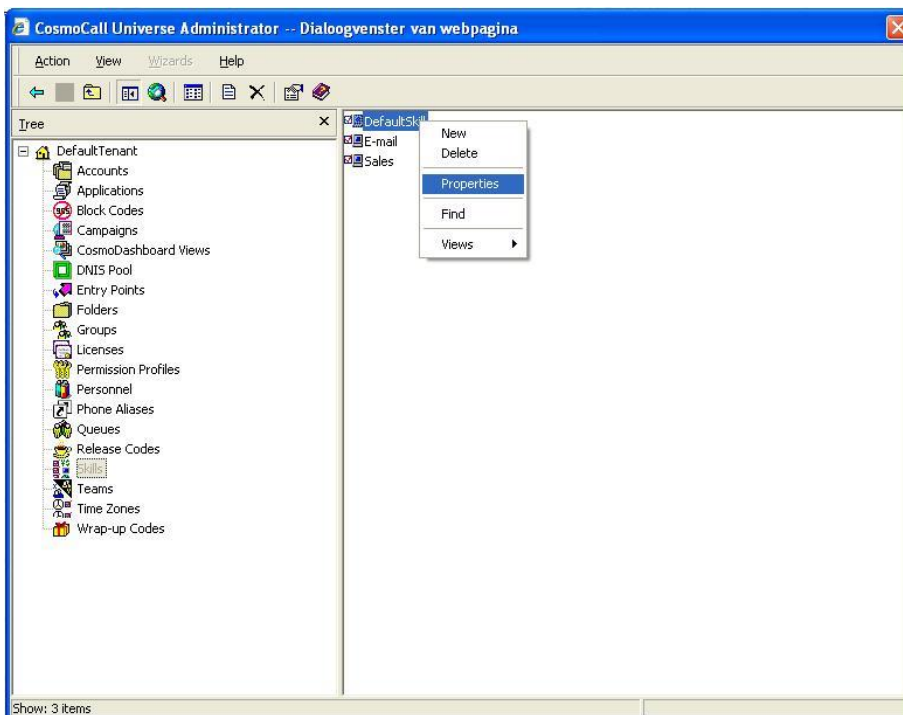
Ensure that the box next to 'Allow weight' is ticked, and then click OK. The value 'true' will now appear at the modified skill.
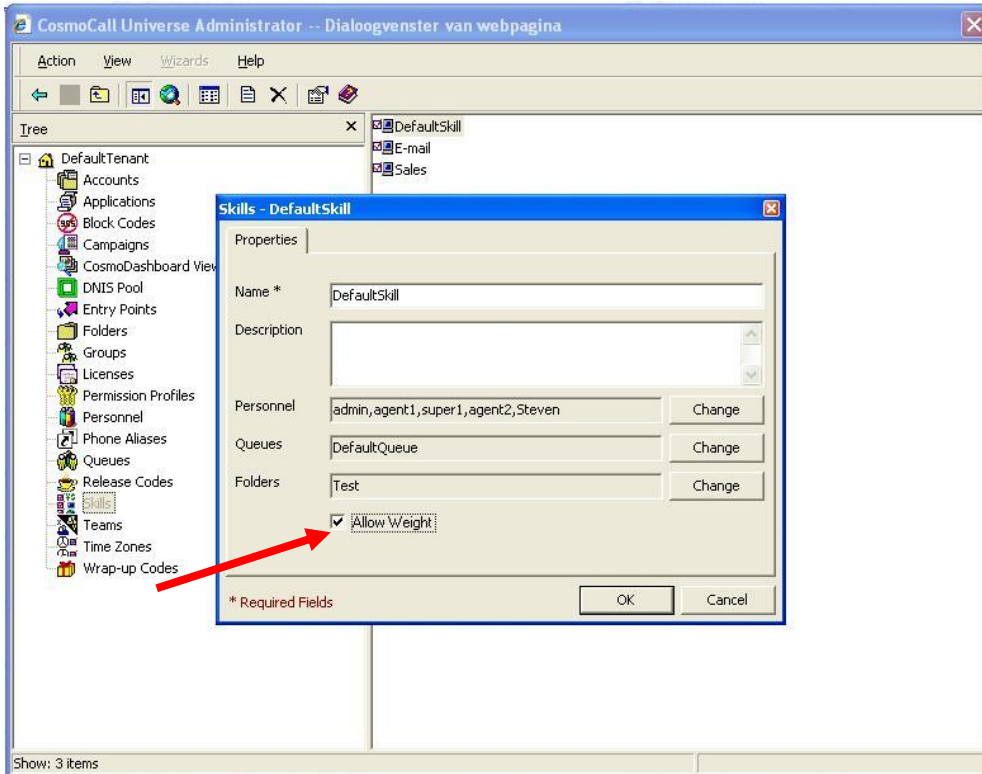
Once this setting has been modified you must go to the queues option in the administrator. Select the queue in which you want to use weighting.
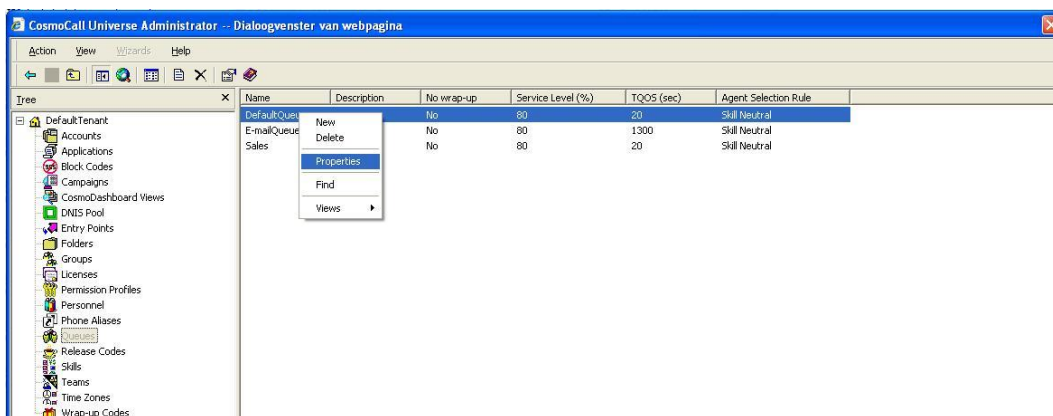
Properties takes you to the screen below: You should indicate under the Agent Selection Rule option whether the agent with Most Skilled, Least skilled or Skill neutral should be offered the call.
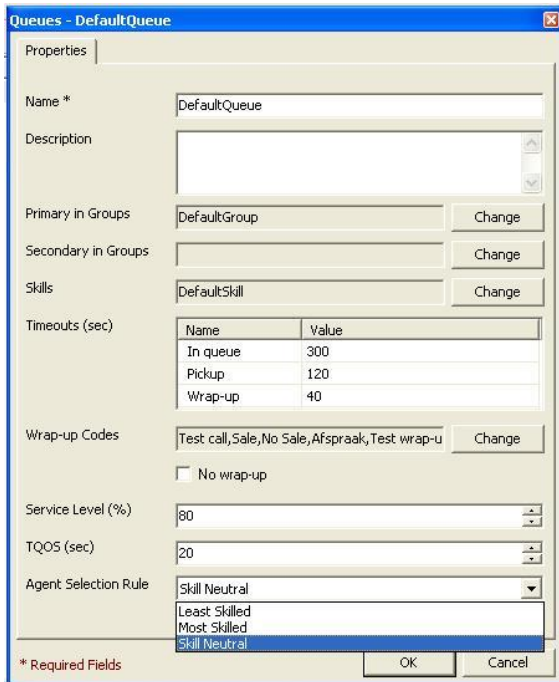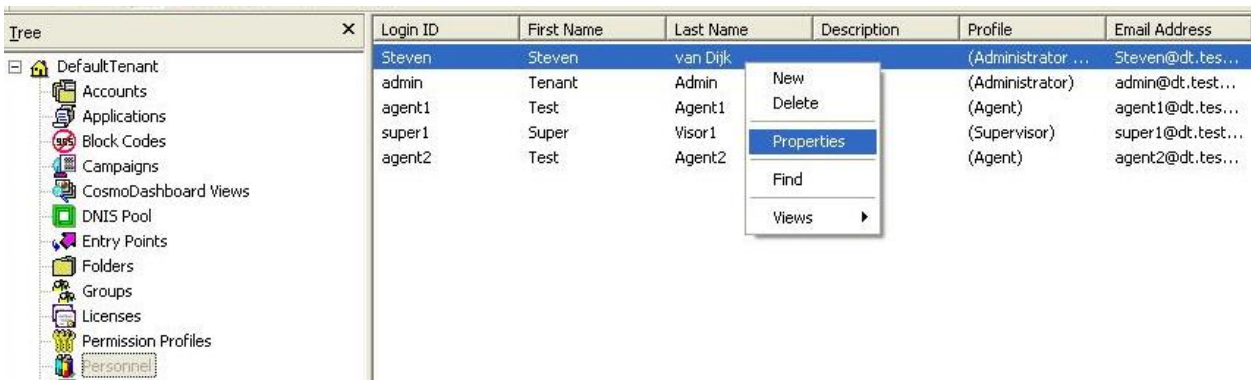
Most skilled: Most skilled
Least skilled: Least skilled
Skill neutral: Skills not important
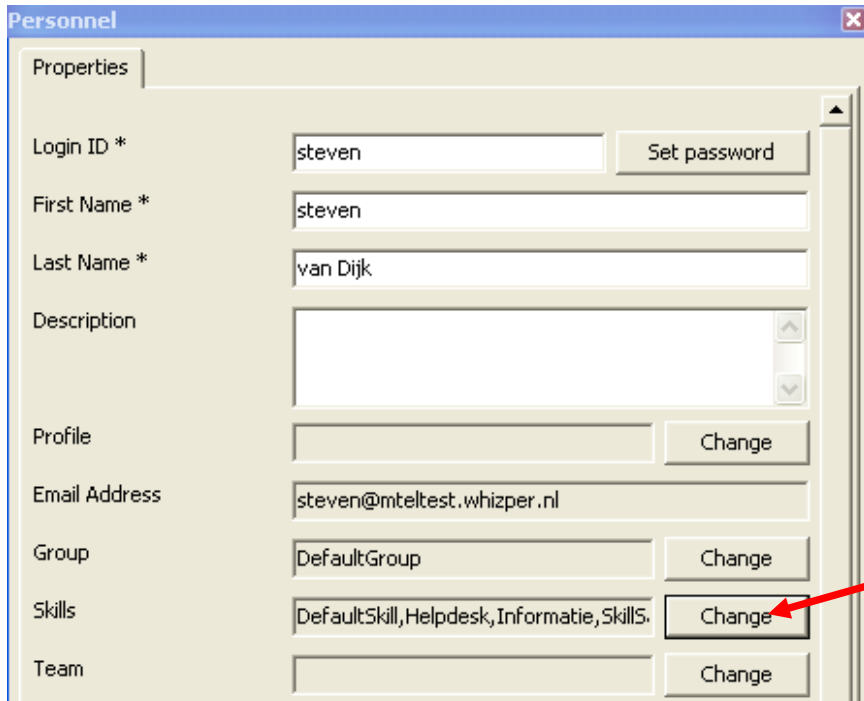Once you have modified this option click OK, and return to the main menu.
In the main menu go to Personnel and select the person whose skills you want to indicate.

Via Properties, go to the properties (characteristics) of the relevant agent.
You are taken to the Properties screen; click the Change button at skills.

Once you have clicked the Change button the following screen appears:
Select the skill of the agent to which you want to link weighting. Right-click to go to Properties, and enter a value between 0 and 100. Click OK and the weights have been assigned.
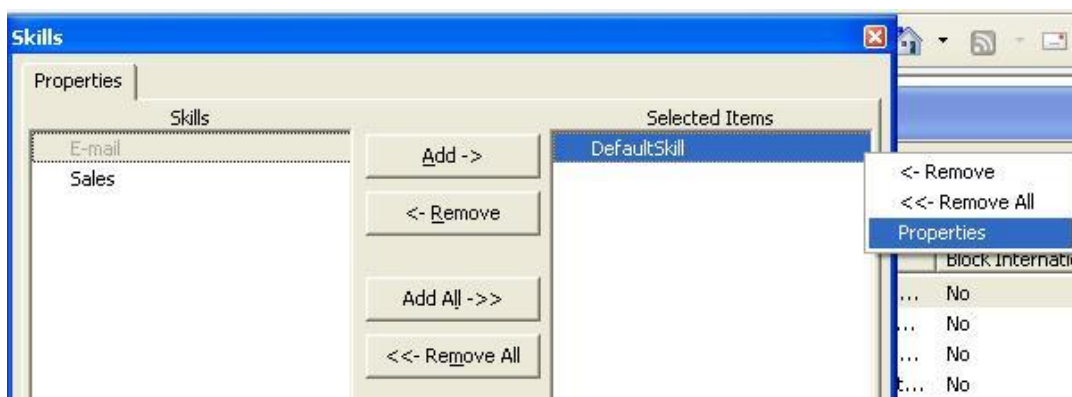
0 is for the most skilled
100 is for the least skilled.
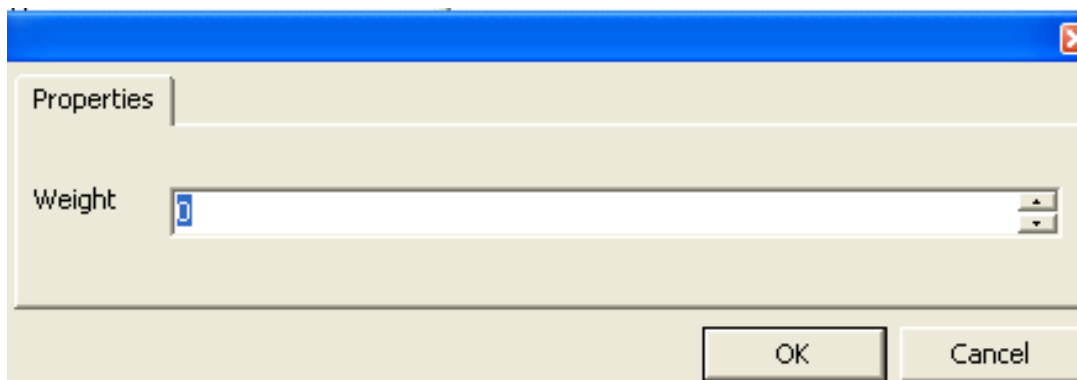
8. Permission Profiles

You can create Permission Profiles in Webadministrator. You use these when you want to give supervisors or administrators extra rights, or you want to restrict their rights. You compile these rights in a profile which you then assign to that person. You need to take the following steps to use them. In the main administrator screen, go to Permission Profiles. If you have not yet created any profiles, right-click in the empty white field. Select New to create a profile.
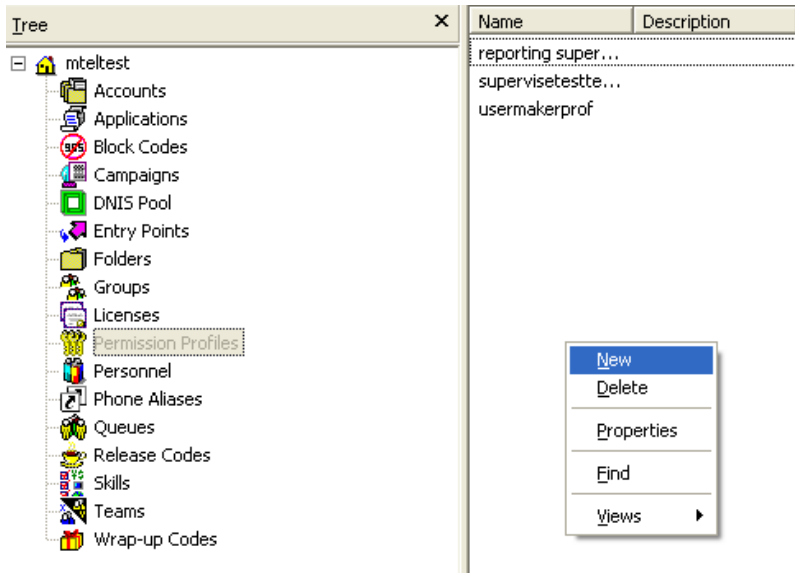
Enter the name and description of the profile. Then click Change to add members who should be assigned this profile. Select the people to whom you wish to assign the profile, in the usual way. Once you have selected the people, you can tick 'Allow creation/deletion of objects' for this profile. If it is ticked, with this profile everyone can create users, queues etc., or can remove components. Then click Permissions.
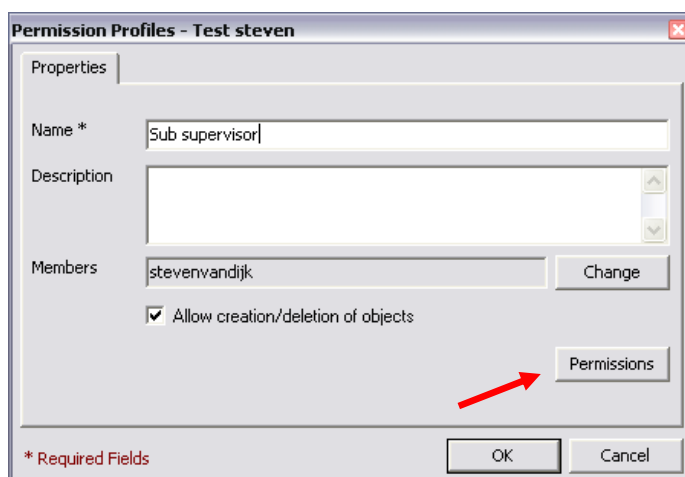
Permission Profiles involve the RAPS security model:

- Reports – Permission to view Realtime Reports and Historical Reports of Agents, groups and queues. Note! With this permission you can only view reports concerning Agents, groups and queues. Accessing a CDR portal is not possible, for instance.

- Administration – Permission to administer Agents. This is limited to modifying the properties and passwords of the agents linked to a group or team. Note! With this permission, you cannot create new agents.

- Playback – Permission to retrieve calls and replay them, from associated queues and agents.

- Supervision – Permission as a supervisor to see agents on a supervisor screen, and to perform supervisor duties like barging-in or silent monitoring.

This example shows the applicability of the permissions per object to:

	R	A	P	S
Campaign	X	X		
Queue	X	X		
Team	X	X	X	X
Group	X	X	X	X

You can draw up the Permission Profile in the following screen. You can tick independently for each component, whether the relevant profile may use this feature. Under Campaigns, Queues, Teams and Groups you can specify this further with the +. When there are multiple groups and a supervisor is responsible for a group, you can indicate through a profile that this supervisor may only be shown his group in his RTR and HR. The same applies to queues, teams and campaigns.
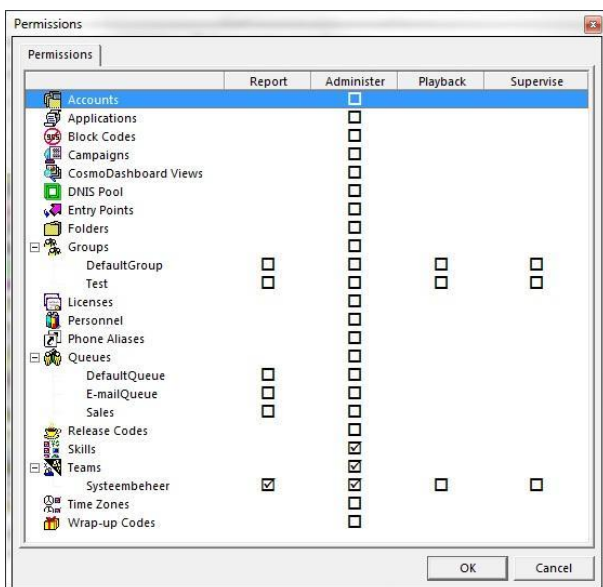
Once you have created the profile you must assign it to a person. In the main menu go to Personnel, select a person and go via Properties to Profile. Click Change and select the profile you have just created, and click OK.

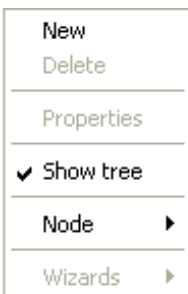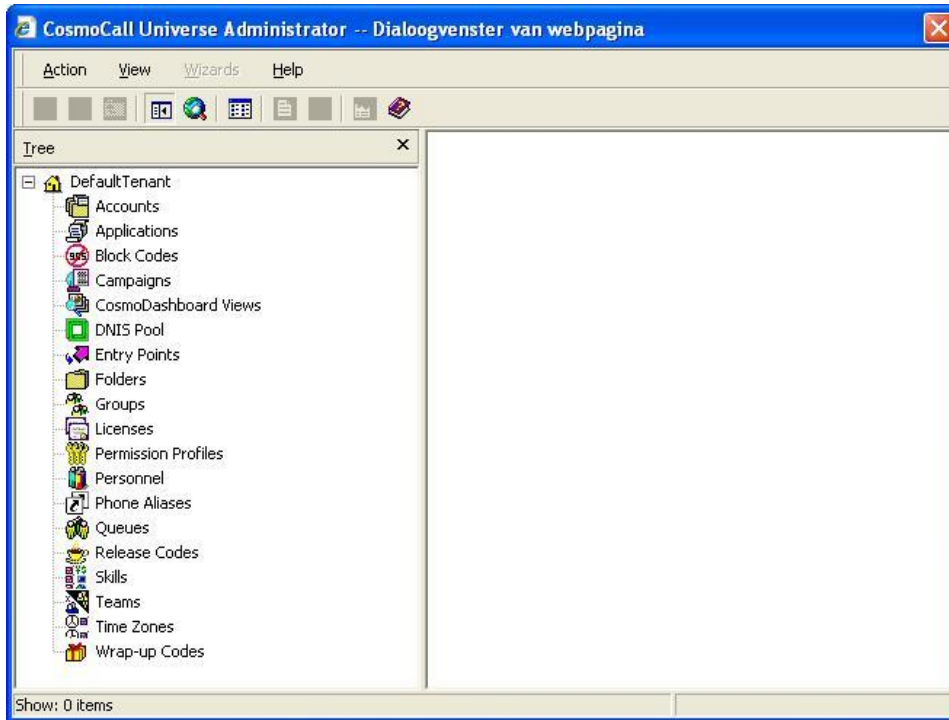In the Personnel screen you will now see the profile with the relevant agent.

9. Creating and modifying Teams

This chapter describes how you can create, view, modify and remove teams.

9.1. Creating a team

Right-click on Teams to see the Tree View of teams.

A shortcut menu appears: Click New. The teams Properties menu opens:

1. In the **Name** field, enter the name of the new team.
2. In the **Description** field, optionally you may add a description of the team.
3. **Personnel** – click **Change** to select the personnel who must be included in this team.
4. When you are finished click OK.

9.2. Modifying and remove teams

You can modify or remove teams by taking the following steps:

1. Select **Teams** in the Tree View.
2. In Detailed View (right-hand side of the administrator) right-click the team you want to modify or remove. A shortcut menu appears:

3. To remove a team you must select a team and then remove it using Delete and a confirmation.
4. To modify a team you must click Properties and enter the desired changes.

Click **OK** when done.

10. Weighting factors

The advantage of using a weighting factor is that the weights ensure that in the availability of agents, the agent is always chosen who has the skill in the highest priority. If no agents with that skill-weight are available, the system then looks for an agent with a skill with a lower priority, and so on.

You can apply it in several ways, as described below:

1. Assigning priority to agents who have the same skill. Example: the most skilled agent(s) always receive the call first on an incoming call. If engaged, the call is routed automatically to a less skilled agent etc.
2. Create an overflow to another department by giving that department the same skill with a lower weight.
3. If no agents from the relevant department are logged in, a safety net can be created by giving the other department the same skill with a lower weight.

To set a weighting factor (priority), you must launch Webadministrator. You must define the weighting factor at three levels, namely:

1. In the Queue
2. At Skill and
3. At Personnel.

Open Webadministrator by going to: https://web.ooc7.mtel.eu/webadministrator
Log in here with your username and password with supervisor or administrator rights.

Go to 'Personnel'. Now all personnel members are shown.
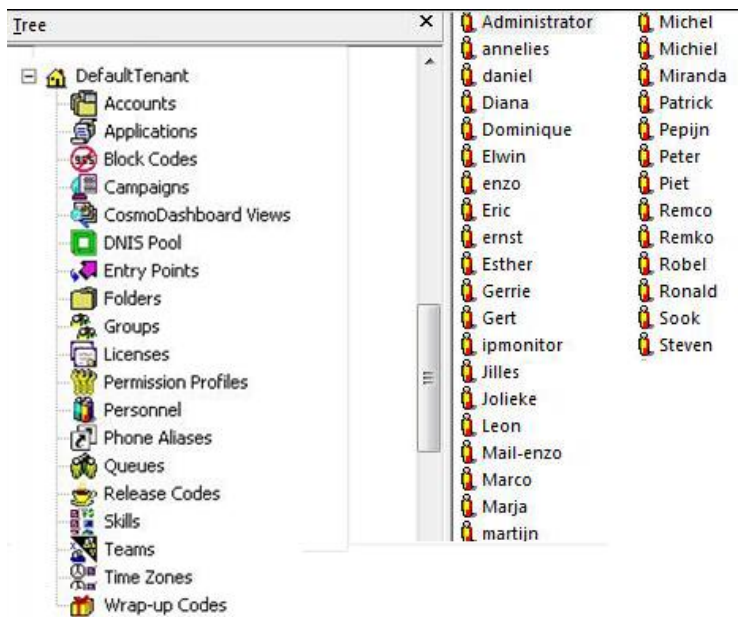
Then go to the relevant agent where the weighting factor(s) must be modified/changed, and double-click this employee.

Now click 'Change' under the 'Skills' section.

The Skills window of Webadminstrator for the relevant employee is now shown:
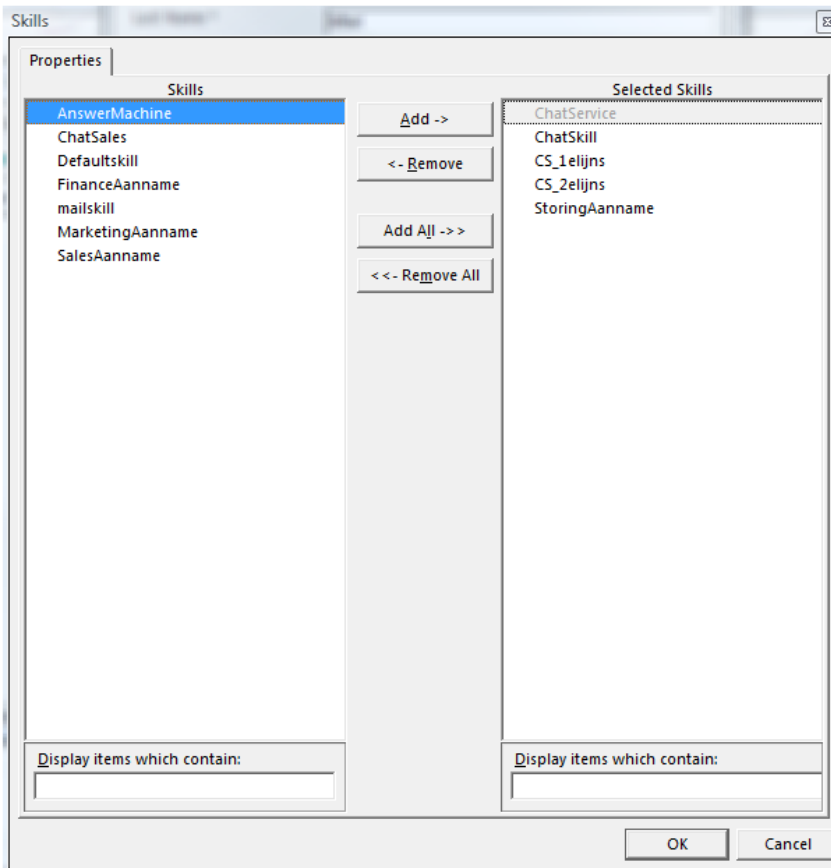
Now go to the skill for which the weighting factor must be modified or changed. In this example we select 'CS_1elijns'. Right-click 'CS_1elijns' and click 'Properties'. The image below is now shown:
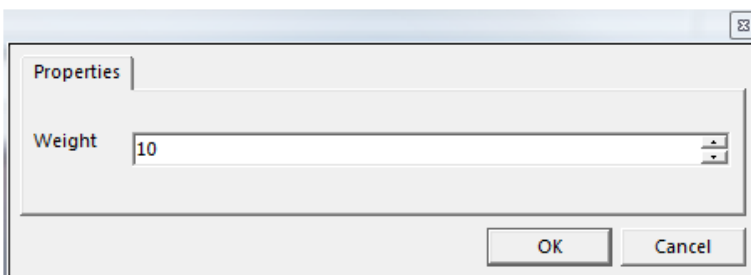

It is possible to enter the desired weighting factor in this window. This can be done on a scale from 0 to 100. The lower the priority, the earlier this agent is assigned the call. We advise setting the weighting factors in steps of 10.

To use the weighting factor, it must however be noted that under the 'Skills' option in Webadministrator, 'Allow Weight' must be ticked for the various skills.
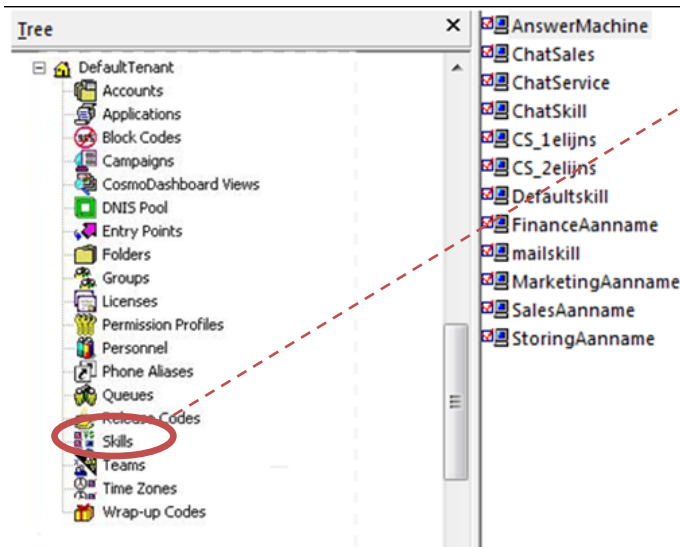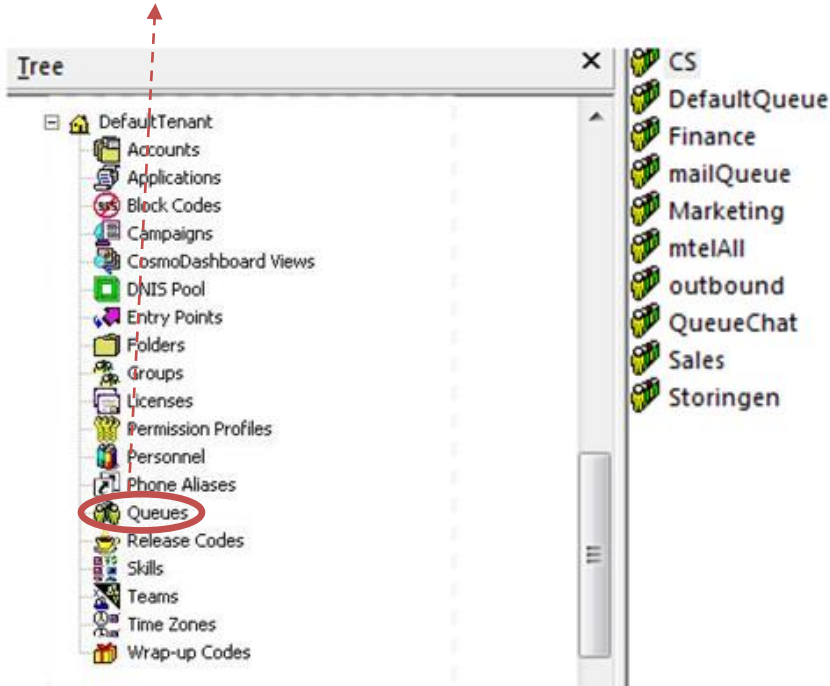

Now right-click one of the skills and then click 'Properties'.
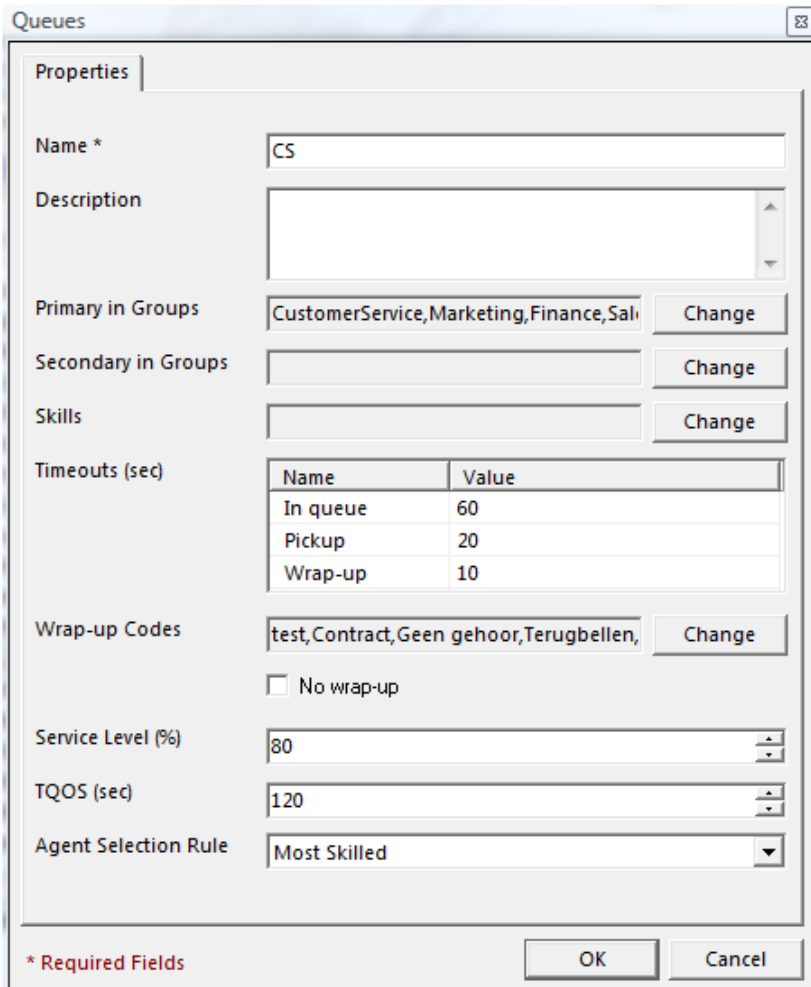The window below is shown:
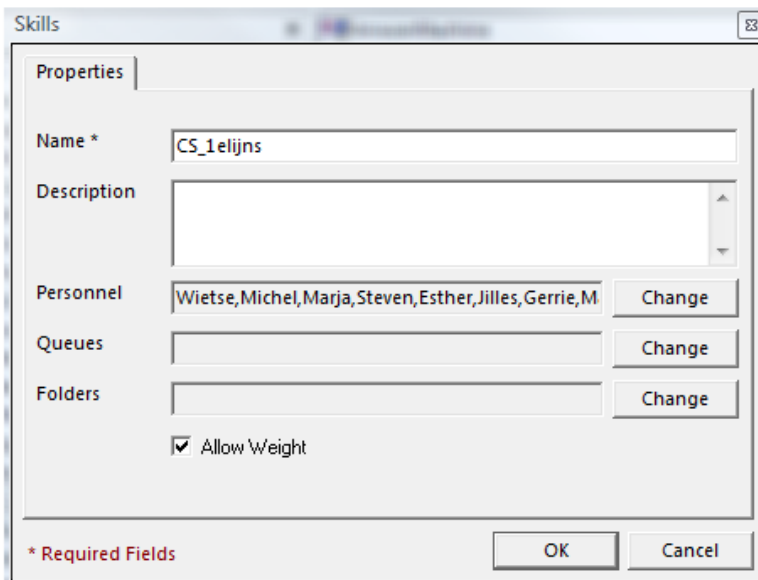
Here check 'Allow Weight' as shown above.
Additionally for the weighting factor to work correctly, one more setting must be modified/checked.

Go to 'Queues' in the root of Webadministrator as shown below:

Now right-click one of the queues and then click 'Properties'. The window below is shown:

In the illustration above, under the 'Agent Selection Rule' section you can choose 'Most Skilled'. Now all the settings have been checked for modifying the weighting factor for this queue. Repeat these steps if all queues must be assigned weighting factors.

When a queue is created, by default the setting is 'Skill Neutral'. This feature will then not work.

If the 'Agent Selection Rule' is set at 'Least Skilled', then priority 100 is the highest and priority 0 is the lowest. When a skill is created, by default the value is on '0'. For this reason we advise using 'Most Skilled'.