

InConcert Allegro



# *Supervisor* Manual



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## *Supervisor's Interface*

The supervisor's interface is designed to give the supervisor important information at a glance. The InConcert supervisor interface will facilitate all the necessary data for auditing processes, management of agents, etc.

## Login

In order to login to the supervisor's panel of the Virtual Contact Center, open a web browser and type the address of the VCC.

<http://xxx.xxx.xxx.xx:8082/inconcert/apps/supervisor>

Here, the Xs represent the IP of the InConcert WebHandler Server. The login screen will prompt the user to type a username and password.



The supervisor will have to type the username, and specify the name of the VCC for which that username is operative.

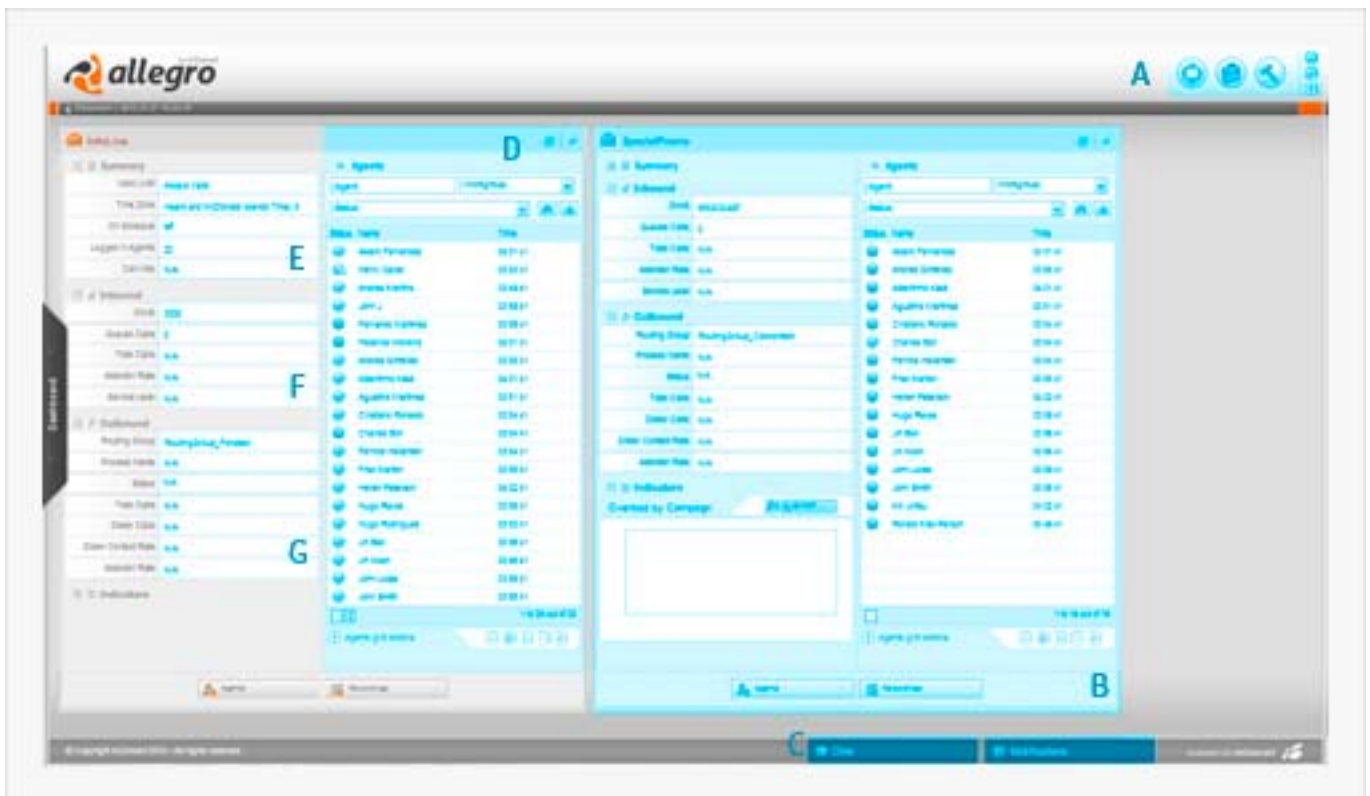
For example, if my username is RDrecker and I need to edit a campaign for the HappinessConsultants VCC, then I need to type the following:

► **Username:** RDrecker@HappinessConsultants

Also, the fields in this screen are case sensitive, so remember to use Upper and Lower case if applicable.

## Main view

In the main view of the Supervisor's screen we can see the different campaigns under supervision; the supervisor's dashboard and the configuration's panel.



The different parts of the supervisor's screen are:

- A) Configurations Panel
- B) Campaigns Panel
- C) Notifications Bar
- D) Agents Panel
- E) Summary Box
- F) Inbound Box
- G) Outbound Box

We will start with the configuration's panel, located atop the other elements.



## Configuration's Panel

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### Refresh Button

By clicking on this button, the system instantly retrieves the information about the campaigns from the server; instead of having to wait until this action is performed automatically by the system.

This action only affects the data for the agents of each displayed campaign.



### Campaigns

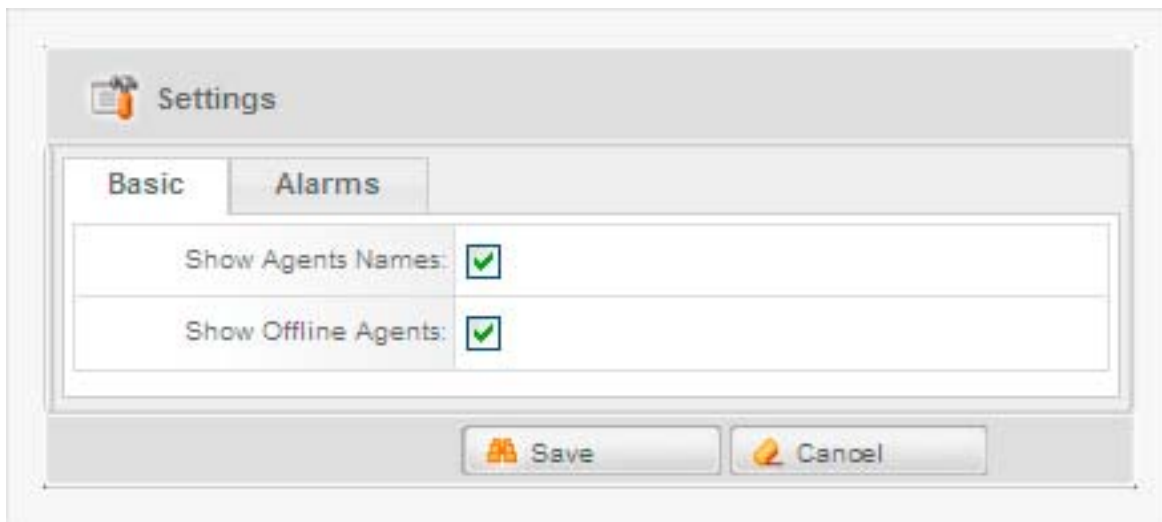
Enables the supervisor to choose which campaigns to visualize.  
The supervisor can visualize up to 10 campaigns at a time.



### Configurations

Enables the configuration of the following parameters

## Show Agent's Names



The supervisor can check if he wants to see the agent's names (OR their IDs) of those agents who are offline.

## Alarm Settings

**Settings**

**Basic** | **Alarms**

**Indicators**

<input checked="" type="checkbox"/>	Inbound Queued Calls	When:	greater than	2
<input type="checkbox"/>	Inbound Abandoned	When:		
<input type="checkbox"/>	Inbound Service Level	When:		
<input type="checkbox"/>	Outbound Contact Rate	When:		
<input type="checkbox"/>	Outbound Abandoned	When:		
<input checked="" type="checkbox"/>	Call Hits	When:	less than	5

**Agents status**

<input type="checkbox"/>	Idle	For:		
<input checked="" type="checkbox"/>	Pause	For:	2	Minutes
<input type="checkbox"/>	Break	For:		
<input type="checkbox"/>	Talking	For:		
<input checked="" type="checkbox"/>	Wrap-Up	For:	45	Seconds

**Configuration**

Play Sound on Alarm:

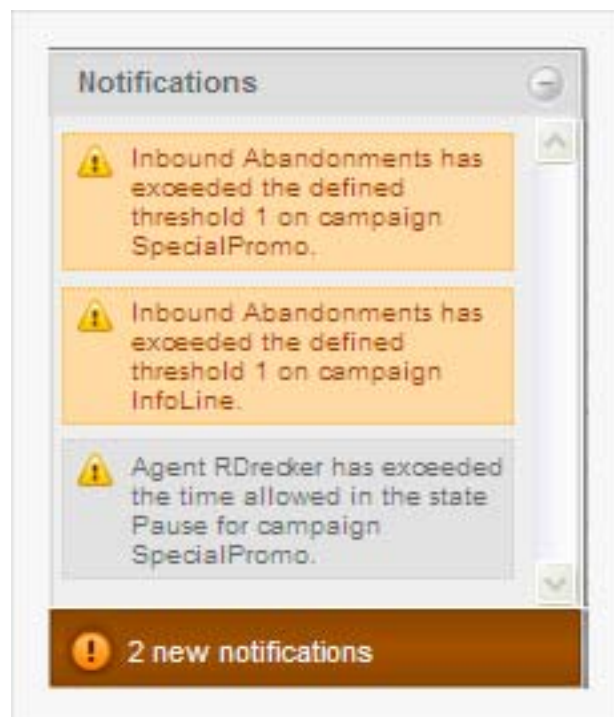
**Save** **Cancel**

Here the supervisor can choose in which cases he wants the system to prompt him with a notification.

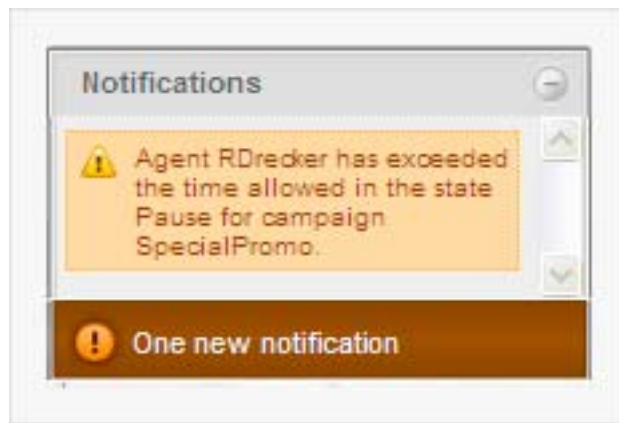
He can set up the timeframes for each notification.

The different alarm settings allow the supervisor to receive notifications about two themes:

- ▶ **Campaign interactions:** the system will prompt the supervisor with a notification when something specific happens regarding the different campaign interactions. If for example the supervisor sets an alarm for when there are ten or more abandoned inbound calls, the system will prompt a notification when this happens.



- ▶ **Agent status:** the supervisor can also configure the system so it tells him when an agent has spent too much time at one given state. For example, if an agent exceeds the allowed "Pause" time, the system will prompt the supervisor with a notification of this fact.



By clicking the “Save” button the changes take place.

When an alarm takes place, a small alarm icon also appears in the correspondent panel. In the case of the agent who spent too much time in “Pause”, the small warning icon will also appear next to the agent name icon.

	Kin Jintsu	00:10:14
	Raymond Drecker	00:11:14
	Ronald Mac Person	00:15:14



### Exit

By clicking on this button the supervisor will exit the application, proceeding to log out.



### Change Password

By clicking this button, the supervisor will be able to change his password.

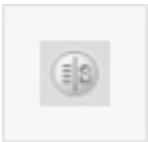
## Campaigns Panels

The different campaigns can be visualized in one panel for each.

The panel visualization is convenient for the cases in which the supervisor needs to oversee more than one campaign.

### Main controls

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#### **Display Agent List**

By clicking on this button, the system will display on the panel the list of all the available agents for one campaign.



#### **Eliminate campaign from View**

By clicking on this button, the supervisor can collapse the campaign panel, and remove it from the visualization.

To retrieve data from an unseen campaign, please see page 8.

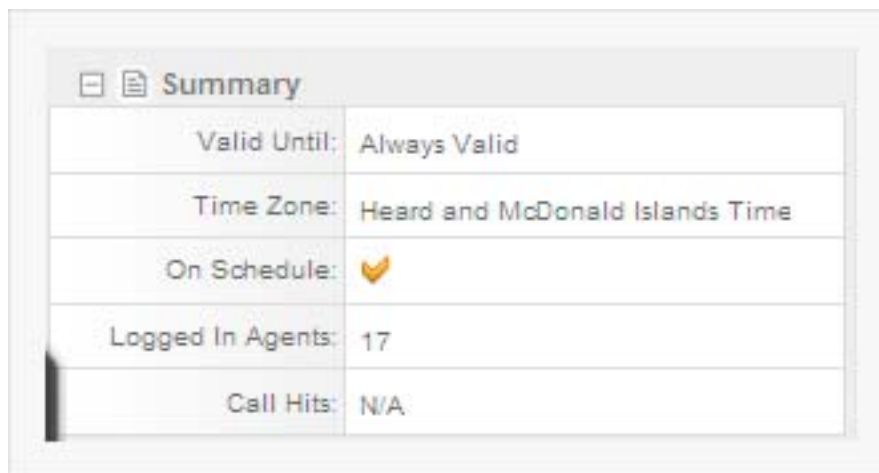
The screenshot displays the InfoLine interface with the following sections:

- Summary:**
  - Valid Until: Always Valid
  - Time Zone: Heard and McDonald Islands Time
  - On Schedule:
  - Logged In Agents: 17
  - Call Hits: N/A
- Inbound:**
  - DNIS: 3000
  - Queued Calls: 0
  - Total Calls: N/A
  - Abandon Rate: N/A
  - Service Level: N/A
- Outbound:**
  - Routing Group: RoutingGroup\_Fonobell
  - Process Name: N/A
  - Status: N/A
  - Total Calls: N/A
  - Dialer Calls: N/A
  - Dialer Contact Rate: N/A
  - Abandon Rate: N/A
- Agents:**
  - (Agent) [ ] (Workgroup) [v]
  - (Status) [v]

Status	Name	Time
	Alvaro Fernandez	01:40:50
	Andrea Gimenez	01:40:50
	Albertinho Kaká	202:20:51
	Agustina Martinez	01:40:50
	Cristiano Ronaldo	01:40:50
	Charles Son	202:20:51
	Fernick Hellenken	01:40:50
	Fred Marton	01:40:50
	Hellen Peterson	01:40:50
	Hugo Reyes	01:40:50
	Hugo Rodriguez	01:40:50
	Jin Kwon	01:40:50
	John Locke	01:40:50
	John Smith	01:40:50
	Kim Jintsu	01:40:50
	Raymond Dredier	202:20:51
	Ronald Mac Penon	01:40:50
- Indicators:**

In the Campaign Panel we can see different blocks that contain different information. We will analyze block by block.

## Summary

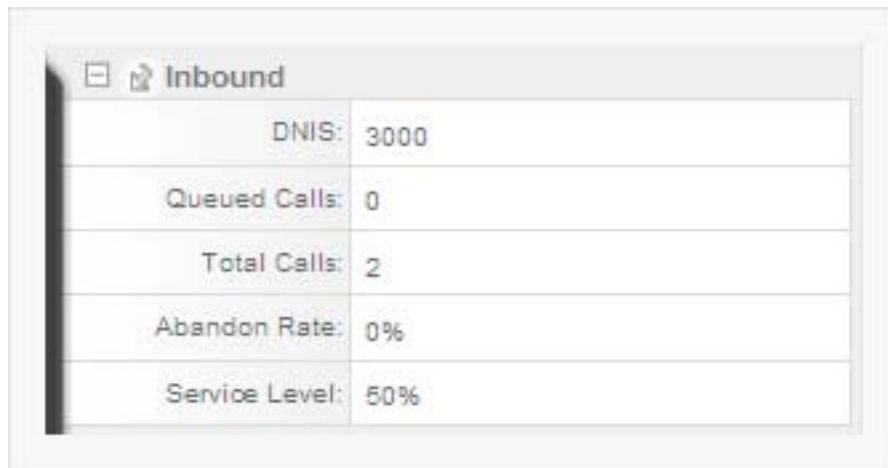


Summary	
Valid Until:	Always Valid
Time Zone:	Heard and McDonald Islands Time
On Schedule:	🍷
Logged In Agents:	17
Call Hits:	N/A

The summary block offers a glimpse of the campaign characteristics and basic data

- ▶ **Valid Until:** date of validity of the campaign. If it says “Always Valid” the campaign is always open and operational
- ▶ **Time zone:** indicates the time zone for which the campaign is operational
- ▶ **On schedule:** indicates whether the campaign is on operational schedule at the time the supervisor is watching
- ▶ **Logged Agents:** number of agents working on the campaign (logged in the system)
- ▶ **Call Hits:** percentage of calls that achieved the campaign objective (closed a sale, resolved an incident, etc)

## Inbound



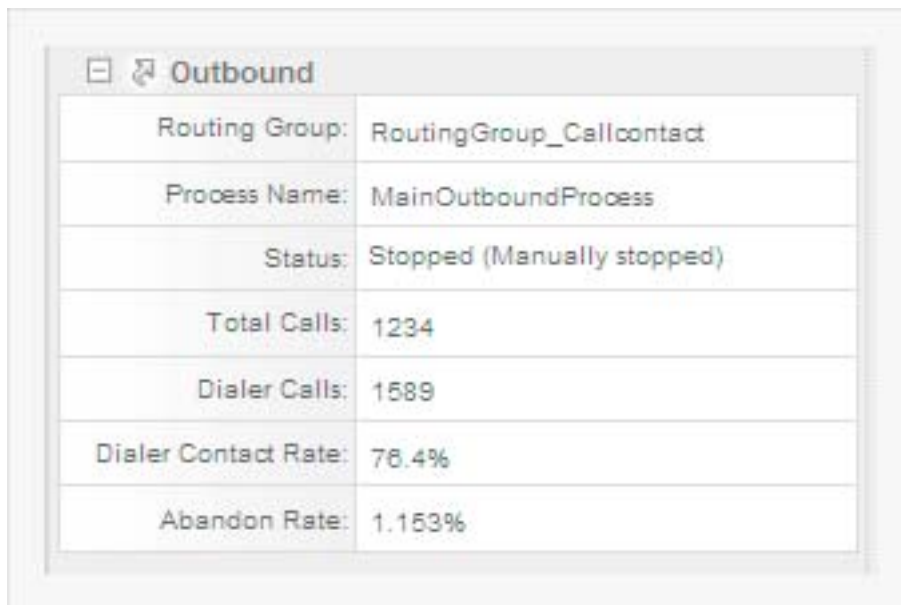
Inbound	
DNIS:	3000
Queued Calls:	0
Total Calls:	2
Abandon Rate:	0%
Service Level:	50%

This block holds the basic information for campaign inbound interactions (if and only if the campaign has inbound interaction configuration).

The fields are:

- ▶ **DNIS:** indicates the dialed number identification service. In this case, it indicates to which number the caller should call in order to reach the campaign
- ▶ **Queued calls:** indicates the number of queued calls for the campaign at a given moment
- ▶ **Total calls:** indicates the number of inbound calls the campaign has received at a given moment
- ▶ **Abandon rate:** indicates the percentage of all the received calls that were ended because the caller hung up
- ▶ **Service level:** indicates the percentage of calls that get answered in the pre-established window of time. The time frame the system sets by default for data retrieving is a window of 15 minutes.

## Outbound



Outbound	
Routing Group:	RoutingGroup_Callcontact
Process Name:	MainOutboundProcess
Status:	Stopped (Manually stopped)
Total Calls:	1234
Dialer Calls:	1589
Dialer Contact Rate:	76.4%
Abandon Rate:	1.153%

The fields in this block are:

- ▶ **Routing group:** indicates the name of the Routing Group used by the Outbound Engine to make the calls
- ▶ **Process Name:** indicates the name of the process for the campaign in the Outbound Engine
- ▶ **Status:** indicates in which status the campaign is currently in. Each status has sub-causes associated, that give the administrator more information in order to take corrective actions. The sub-causes can be as follow:
  - ▶ CAMPAIGN END: The campaign ended or the process is inactive.
  - ▶ MANUAL STOP: the process or the engine were stopped
  - ▶ INVALID INPUT DATA: the data for calling is incorrect. The process is stopped or invalid
  - ▶ INACTIVE CAMPAIGN: the campaign is inactive. The outbound process is still working but it won't make calls until the campaign is active again
  - ▶ ALL CHANNELS BUSY: all the telephony channels are busy in conversation
  - ▶ DIALING (MAX CHANNELS): the process is dialing in order to occupy all the possible agents

- ▶ NO AGENTS LOGGED: there are no logged in agents for the campaign
- ▶ ALL AGENTS BUSY: all agents are busy talking or waiting for a call
- ▶ DIALING: the process is dialing in order to cover all the free agents
- ▶ ALL CONTACTS CONTACTED/CANCELED: all the contact batches have been contacted or cancelled
- ▶ AVAILABLE CONTACTS BEING CALLED: the remaining contacts on the database are being called
- ▶ CONTACTS WAITING SCHEDULE: the remaining contacts are waiting to be scheduled
- ▶ NO CONTACTS LOADED: there aren't any contacts in any batch
- ▶ LOADING MORE CONTACTS: the engine is loading more contacts
- ▶ SYSTEM UNAVAILABLE: some external system is not responding
  
- ▶ **Total Calls:** indicates the total number of outbound calls the campaign has carried out during the last 15 minutes
- ▶ **Dialer calls:** indicates the total number of calls made by the outbound engine in the last 15 minutes
- ▶ **Dialer Contact Rate:** indicates the percentage of connected calls for the outbound engine for the last 15 minutes
- ▶ **Abandon Rate:** indicates the percentage of abandoned calls (the percentage is calculated using the number of connected calls and not the total number of calls)

## Indicators

The indicators block is simply a set of graphs that give the supervisor an idea of particular situations in the campaign.

### *Agent Status Graph*



In this graph, the system shows bars that group the agent by their status at a given moment.

### *Overload by Campaign*



The graph “Overload by campaign” shows the number of agents working on a campaign, who don’t have that campaign set by default.

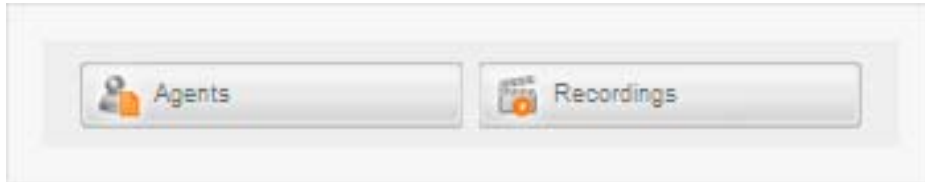
If there are two campaigns with 10 people assigned to each, but Campaign A has 15 agents working on it, then Campaign A will be overloaded by 5 agents.

In the graph the campaign SpecialPromo is overloaded by 1.

The campaign overload charts show in a clear and easy way, which campaigns are spending more resources.

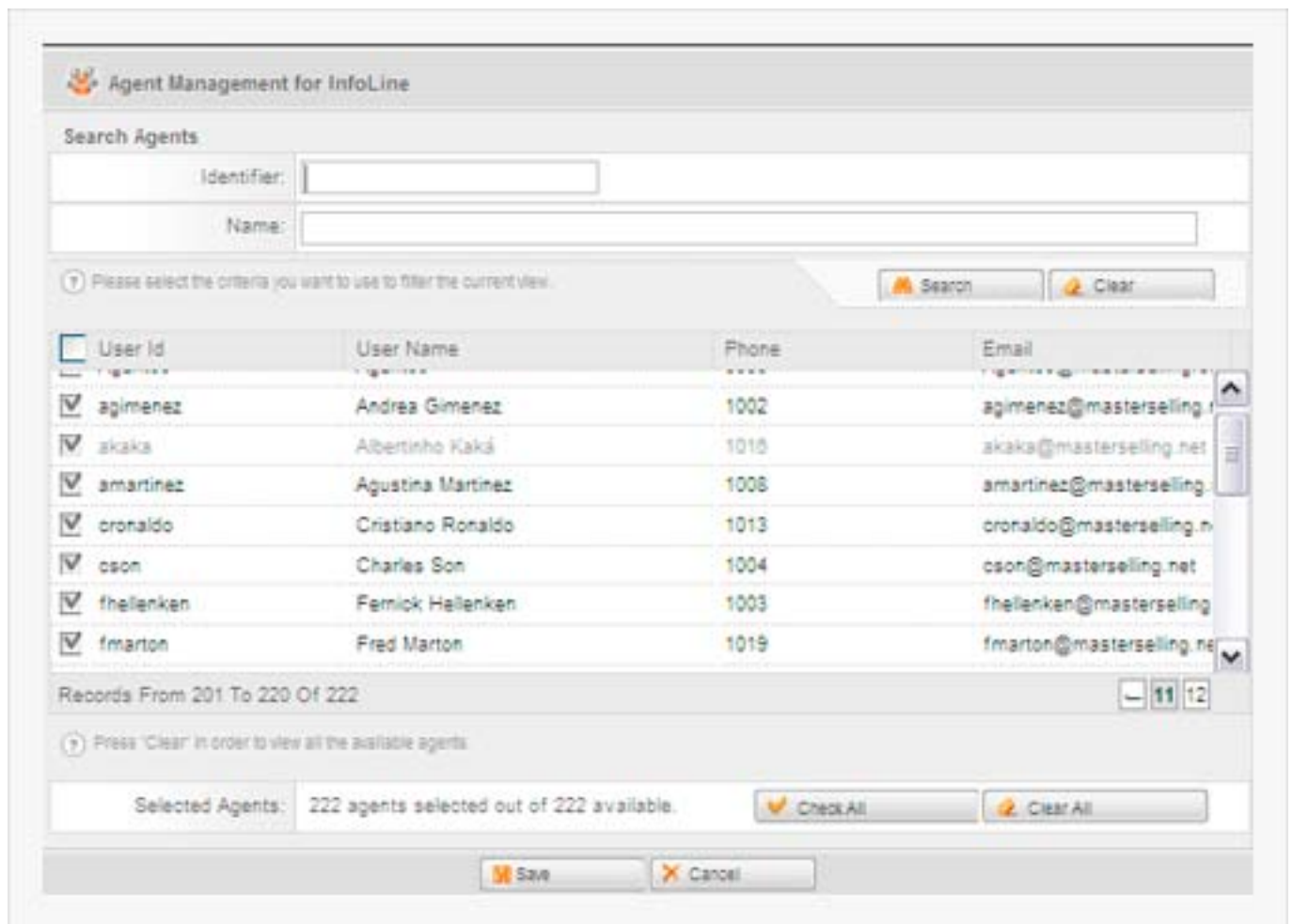
## Buttons

Below the different blocks, we can see two buttons: Agents and Recordings.



### Assigning agents

The “Agents” button opens a screen where the supervisor can see the different agents working on the campaign in question.

The screenshot displays the 'Agent Management for InfoLine' interface. At the top, there is a search section with fields for 'Identifier' and 'Name', and buttons for 'Search' and 'Clear'. Below this is a table of agents with columns for 'User Id', 'User Name', 'Phone', and 'Email'. All agents in the table are selected with checkmarks. At the bottom, there is a status bar showing 'Selected Agents: 222 agents selected out of 222 available' and buttons for 'Check All', 'Clear All', 'Save', and 'Cancel'.

User Id	User Name	Phone	Email
agimenez	Andrea Gimenez	1002	agimenez@masterselling.net
akaka	Albertinho Kaká	1010	akaka@masterselling.net
amartinez	Agustina Martinez	1008	amartinez@masterselling.net
cronaldo	Cristiano Ronaldo	1013	cronaldo@masterselling.net
cson	Charles Son	1004	cson@masterselling.net
fhellenken	Fernick Hellenken	1003	fhellenken@masterselling.net
fmarton	Fred Marton	1019	fmarton@masterselling.net

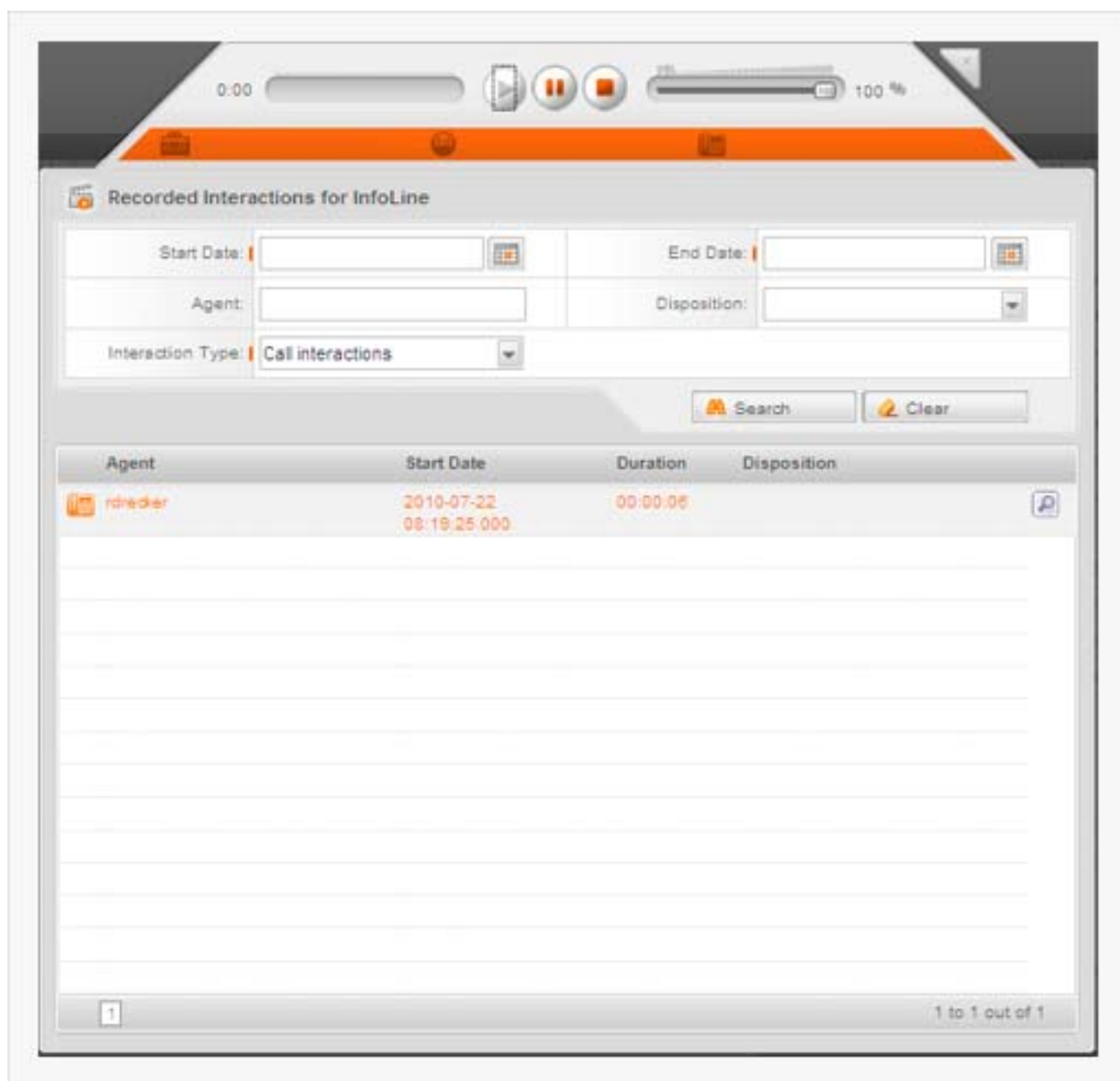
The filter options on top of the list allow the supervisor to look for individual agents available in the VCC. He can look for agents by ID or by name.

By checking the checkboxes the supervisor assigns the agent to the current campaign. He can also remove agents currently working on the campaign.

Below the list there's the "Check all" option checks all the available agents for the campaign, including those that are not visible in the list. The "Clear all" option unchecks all the available agents.

### Recordings Button

The recordings button opens a screen where the supervisor can check the different recordings for interactions by the different agents.



The interactions are displayed on a list that orders them linearly.

The supervisor can filter the data

- ▶ **By date:** entering the start date and the end date to select the period of time he wants to oversee.
- ▶ **By agent name**
- ▶ **By disposition:** The disposition is basically the result of the interaction from the operative point of view of the contact. For example: “Sale achieved”, “No sale”, etc. This field has some relation with the “Call Hits” field.

The supervisor can also select the type of interaction he wants to check. If he selects Call Interactions, then he will be able to listen to call recordings.

If he selects Chat Interactions, he will be able to read chat logs.

In order to actually be able to listen to a present interaction (live monitoring), the supervisor needs to click on the button to the right of the list, the one with the magnifying glass on it.

After he does this, he will be able to listen to the live interactions using the elements in the media console.

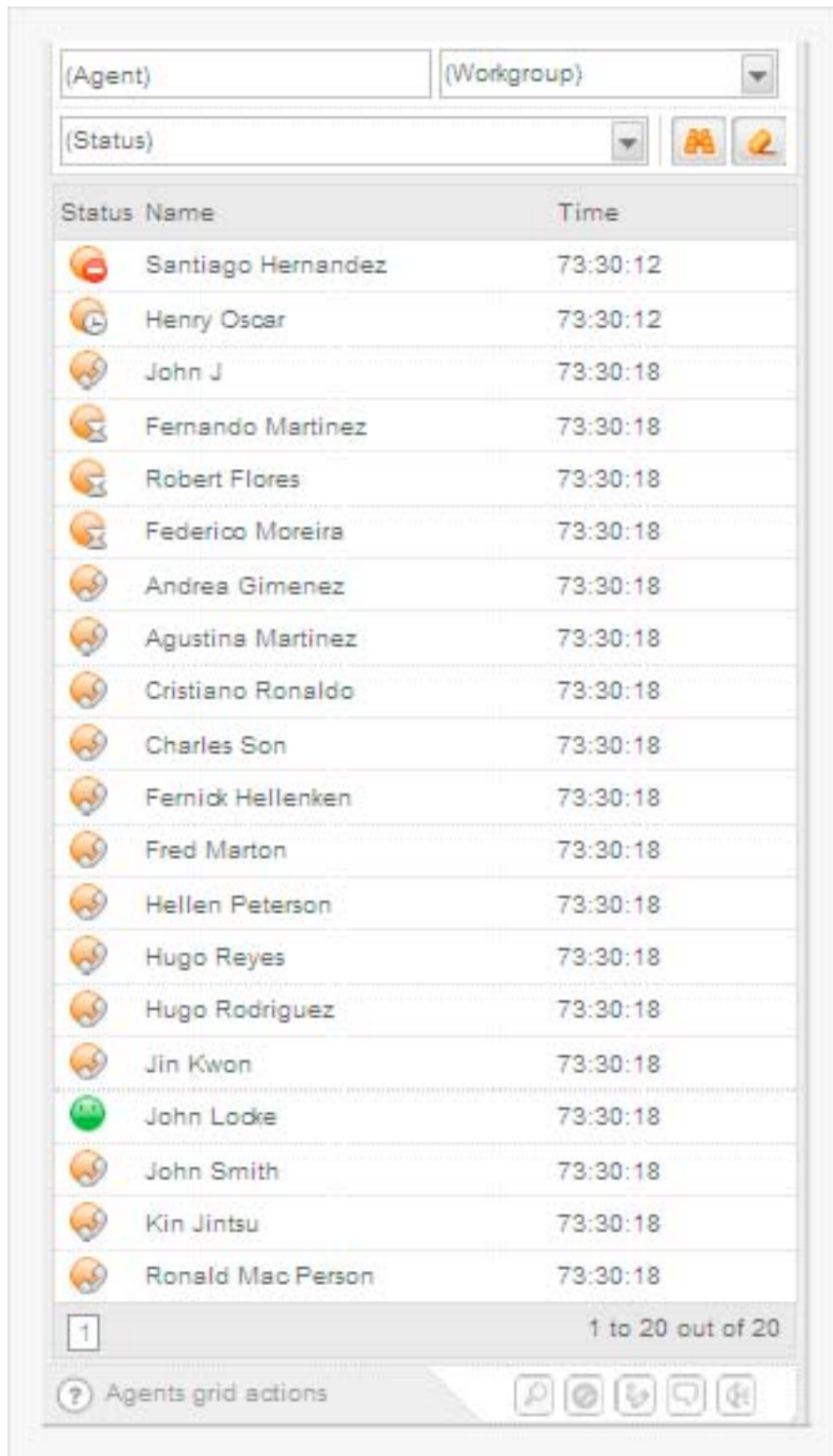


To begin listening press the “Play” button. The supervisor can pause the media file at any time by pressing the “Pause” button, and resume playing by pressing the play button again.

The volume control is to the right of the console.

In order to close the Recording screen just click on the right side of the console, where the “close” icon is.

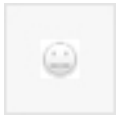
## Agent List



Status	Name	Time
	Santiago Hernandez	73:30:12
	Henry Oscar	73:30:12
	John J	73:30:18
	Fernando Martinez	73:30:18
	Robert Flores	73:30:18
	Federico Moreira	73:30:18
	Andrea Gimenez	73:30:18
	Agustina Martinez	73:30:18
	Cristiano Ronaldo	73:30:18
	Charles Son	73:30:18
	Fernick Hellenken	73:30:18
	Fred Marton	73:30:18
	Hellen Peterson	73:30:18
	Hugo Reyes	73:30:18
	Hugo Rodriguez	73:30:18
	Jin Kwon	73:30:18
	John Locke	73:30:18
	John Smith	73:30:18
	Kin Jintu	73:30:18
	Ronald Mac Person	73:30:18

The agent's list is a comprehensive view of all the agents working in the campaign. The supervisor can filter the agents by name, workgroup or status.

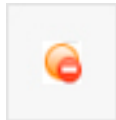
The different status available to filter are:



**Offline:** the agent is offline



**Idle:** the agent is online, but has not engaged in any interactions for a while



**Pause:** the agent set his status to pause



**Break:** the agent set his status to break (choosing from the available array of breaks in his BarAgent application)



**Busy on another campaign:** the agent is currently working for another campaign



**Multiple interactions:** the agent is tending to multiple interactions at once



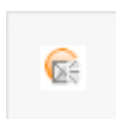
**Talking:** the agent is talking to a client



**Wrapping up:** the agent is finishing up the processes after a call



**Chatting:** the agent is chatting with a client



**Voicemail:** the agent is listening and/or answering a voicemail



**Waiting for a call:** the ACD (automatic call dialer) has already scheduled a call for the agent and the agent is waiting for it

**Busy:** the agent's line is busy

Once the supervisor selects an agent, there are several actions he can perform by clicking on the buttons displayed on the lower right side of the Agent's list.



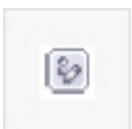
From left to right the buttons are:



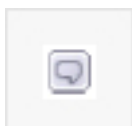
Agent information



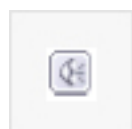
Logout Selected agent



Change selected agent status




Chat with agent



Monitor agent interaction

## Agent Information

 **Agent Raymond Drecker status info for campaign SpecialPromo.**

Identifier:	RDrecker
Complete Name:	Raymond Drecker
Preferred Campaign:	SpecialPromo
Extension:	1040
Logged In Time:	00:05:13
Total Calls:	N/A
Time on Current State:	00:00:04

State	Count
Talking	0
Idle	1
Break	1
Pause	0
Wrap-Up	0
Training	0
Personal	0
Toilette	0
Custom	3

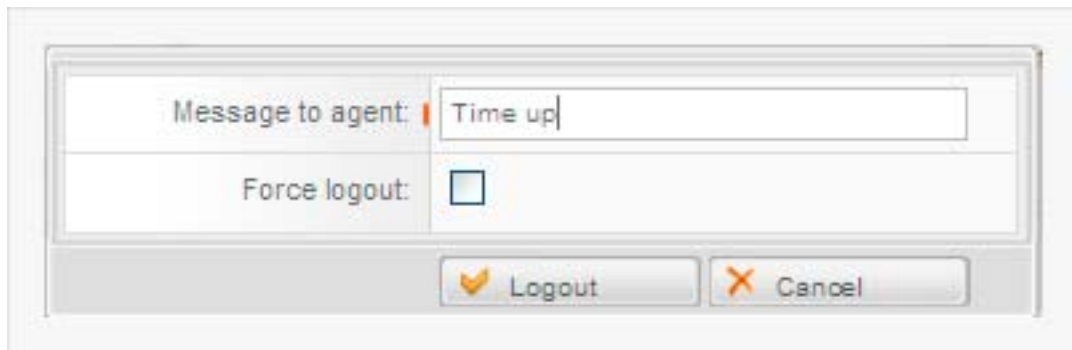
Status	Time
Talking	00:00:00
Idle	00:00:36
Break	00:00:44
Pause	00:00:08
Wrap-Up	00:00:00
Training	00:00:16
Personal	00:00:22
Toilette	00:00:16
Custom	00:02:50

The agent information screen is displayed once the supervisor clicks on the button.

The first fields of information are: agent's ID, agent's name, preferred campaign, extension number, logged in time, total number of calls and time spent in current state.

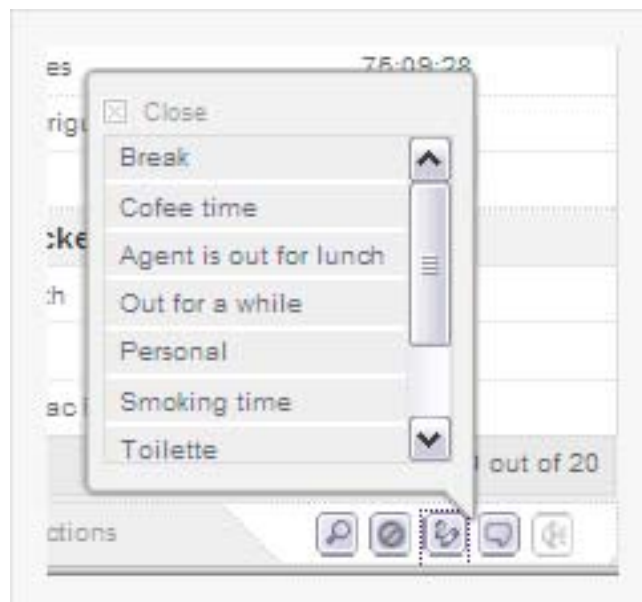
The information below basically tells the supervisor how much time the agent spent in different status.

### Logout selected agent



Here the supervisor can log the agent out of the system and send him a message.

### Change selected agent status



With this option the supervisor can select a different status for the agent.

## Chat with agent

Starts a chat session with the agent.

## Monitor agent interaction

Allows the supervisor to listen in real time to the interaction being performed by the selected agent.

By clicking on the button, the system will open a small media player so that the supervisor can listen in real time to the interaction being carried out by the agent.

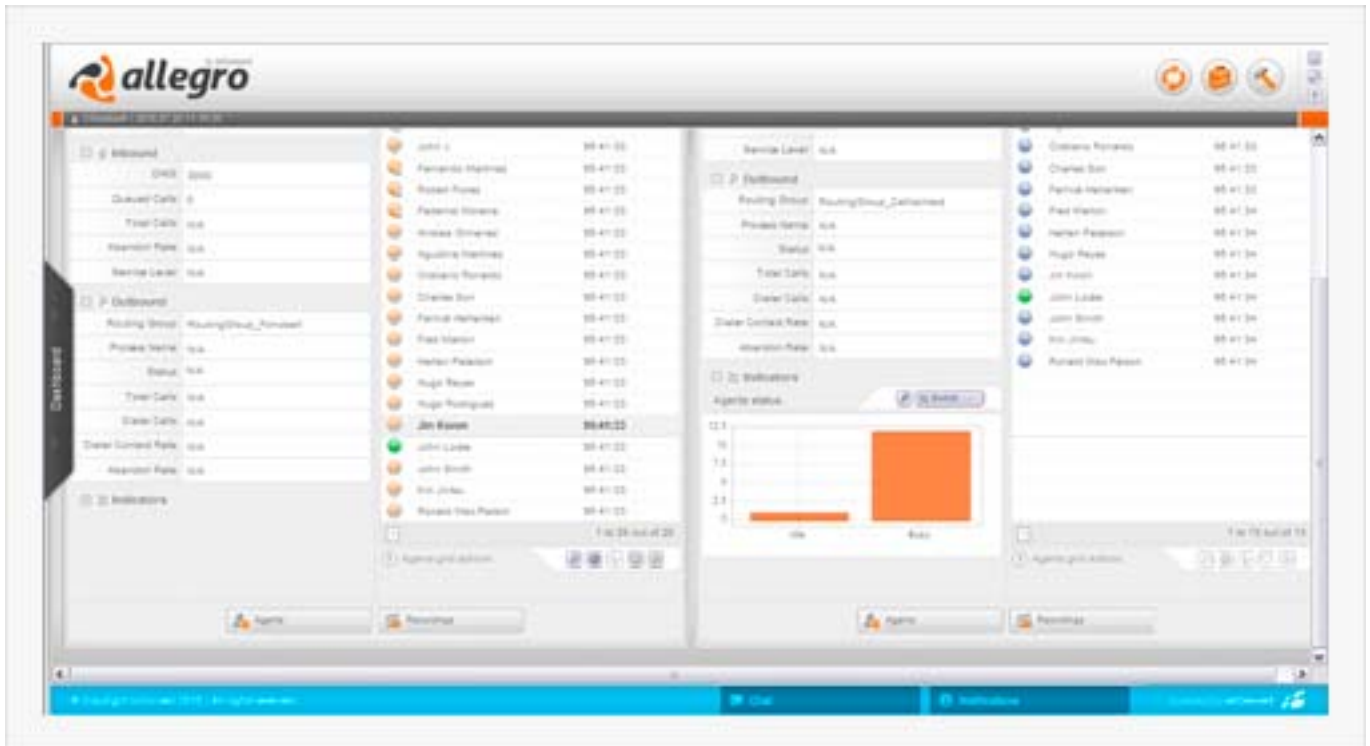


### ***Important Note***

The commands are state sensitive, this means that they are activated whenever the state of the agent allows their application.

## Notifications Bar

The notifications bar is located at the bottom of the supervisor's console.

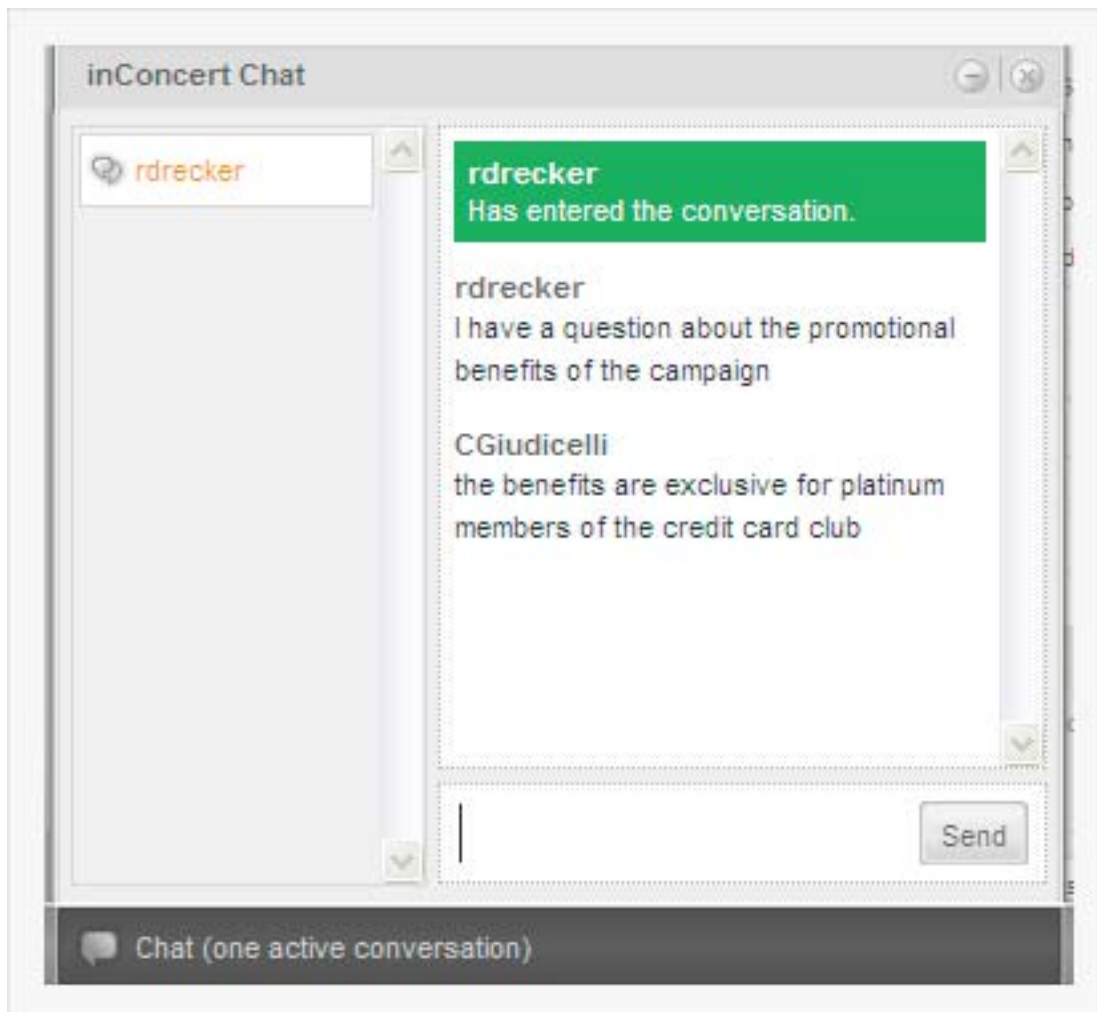


The notification's bar has basically two functions: Chat and Notifications.

When there's a new action in either one of the blocks the button will flash with orange, so that the supervisor can see it.

## Chat

This function enables the supervisor to establish chat sessions with the different agents.



By clicking on the chat button in the notifications bar, the system will open the chat interface. To the left of the interface the supervisor will be able to see a list of the different agents active in a chat session with him. To the right, there's the dialog box and the chat interaction itself. To send a message, type it in the dialog box and press enter (or click send).

If the supervisor wants to establish a chat session with a given agent, he needs to select the agent in the agent's list and press the chat button. Please see page 29 for further instructions.

## Notifications

The notifications button will also flash in orange whenever the supervisor gets a notification. By pressing on the button, the system opens a list of the notifications received.

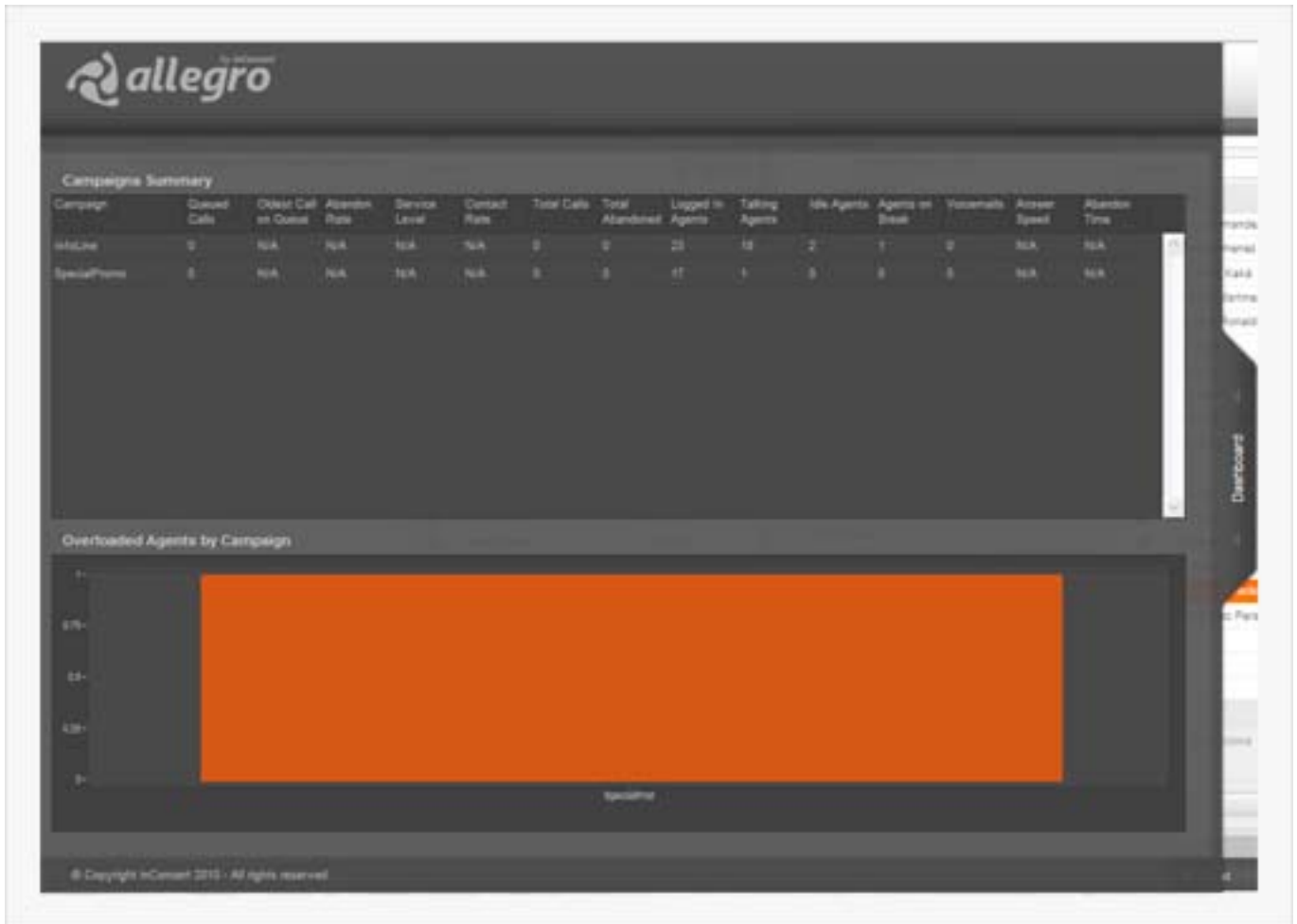


The different actions notified by the system through this process are:

- ▶ **Alarms:** if the supervisor has set an alarm (as seen in page 10)
- ▶ **Loss of network connectivity:** loss of connection with the server. The supervisor has to recheck the connection to the network, or his internet connection if he is working remotely.
- ▶ **The supervisor is removed from a campaign:** if the supervisor is removed from a campaign by the administrator, a notification of this will appear.
- ▶ **The supervisor is assigned to another campaign:** if the administrator assigns the supervisor to another campaign, a notification will appear.
- ▶ **Someone logged in using the supervisor's credentials:** if a person logs into the system using the supervisor's credentials, the system will file a notification. When this happens, the console becomes inoperative and the supervisor has to log in again.

## Supervisor's Dashboard

The dashboard is located to the extreme left of the supervisor's screen. By clicking on the dashboard tab, the dashboard will deploy itself onto the screen.



The dashboard is composed of two blocks of information

- ▶ Campaigns summary
- ▶ Overloaded agents by campaign

The data on the dashboard can be updated instantly by clicking on the refresh button. If refresh is not forced upon the system by clicking on the button, the data on the dashboard comprises the last 15 minutes.

In the “Campaigns summary” block the supervisor can see the different figures the campaign is making for the inbound interactions.

The dashboard has two types of indicators: real time indicators and historic indicators.

Usually, historic indicators are averages, while real time indicators are number of calls at the moment the supervisor is watching the dashboard.

The fields contemplated are:

- ▶ **Queued calls:** indicates the number of queued calls, clients that are calling an inbound campaign and are currently waiting for an agent to speak to them.
- ▶ **Oldest call on queue:** indicates who is the client who has been waiting in queue for the longest time is the oldest call in the queue list
- ▶ **Abandon rate:** is the percentage of calls that were hung up before an agent got them
- ▶ **Service level:** is the percentage of calls that get answered by agents before a pre-defined time window.
- ▶ **Contact rate**
- ▶ **Total Calls:** indicates the number of calls the campaign has received and/or made
- ▶ **Total abandoned:** indicates the number of calls that were hung up before an agent got them
- ▶ **Logged in Agents:** indicates the number of agents logged working in each campaign
- ▶ **Talking agents:** indicates the number of agents who are busy talking in interactions for each campaign
- ▶ **Idle agents:** indicates the number of idle agents in each campaign
- ▶ **Agents on break:** indicates the number of agents who are on a break at a given moment for each campaign
- ▶ **Voicemails:** indicates the number of pending voicemails for each campaign
- ▶ **Answer speed:** indicates the average number of seconds within which the calls are answered for each campaign
- ▶ **Abandon time:** indicates the average time in seconds that callers spend before hanging up the phone due to lack of attention.

The campaigns overload chart, located in the lower block of the dashboard shows the number of overloaded agents for EACH campaign.

In the case of the screenshot above, there's only one campaign with overload, so the graph displays only one column. For more information on Overloaded Agents please see page 19.

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