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The Right Technology, the Right Results

Oracle ContactCenter@nywhere

Supervision Quick User Guide

February 2007

Learning Services
Promero

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CENNTERCENTER @NYWHERE SUPERVISOR MANAGER

I. Benefits and Features of Using Supervision Manager

With the Supervision Manager, you can supervise Agents from any computer connected to your call center over your company network or the Internet.

The Supervision Manager's browser-hosted interface provides logically grouped controls for quickly navigating to all Supervision Manager Screens.

CenterCenter@nywhere and the Supervision Manager provide robust features for call center Supervisors, including:

- A browser-based interface, allowing you to work locally (intranet) or remotely (internet).
- Conferencing capability allows participation with Agents on active Interactions.
- Whisper coaching allows you to assist Agents without the caller hearing.
- Join Agent feature allows you to take immediate control of the Agent's Interaction with the customer.
- Viewing of Agent screens.
- Take control of Agent connection to the call center and to the customer.
- Workgroup-level monitoring.
- Customizing, generating, and printing call center reports.
- Provides logically grouped controls for quickly navigating to all Supervision Manager Screens.

II. Launching the Supervision Manager

1. **Login** into a Customer's Call Center.
   - Company Alias Name: Your Company should display
   - UserName: **Enter your Username**
   - Password: **Enter your password**

2. **Select** Supervision Manager from the main login Window.

3. The **Agent Status** Window displays. Refer to Figure 1.

The Agents Status window displays whenever you launch the Supervision Manager. If it does not, click the Agent Status on the Navigation Pane.

III. Global Command Buttons 

These Global Command Buttons are static throughout all 3 modules of CenterCenter@nywhere.

1. **Configure**

   The setup in these tabs is controlled by your business requirements/rules they provided to Promero. These can be changed by their Administrator.

   - **The Alarms Configuration Screen Displays –** Setting these Alarms notifies the supervisor when a trigger has exceeded the time specified. When the time exceeds your limit, the Interaction entry changes to yellow or red. Automatic indicators identify agents that are being coached, to indicate that the interaction is being recorded, to indicate idle agents, etc.

   - **Phone Tab –** You need to select the type of phone system their company uses.

     - **H323 =- Enter their IP address**
     - **SIP – Enter the IP address**
     - **MSI** – **Enter MSI Identification** Number in the MSI window
     - **PBX** –**Enter phone extension** in phone window.
     - **Remote Extension/External Phone Number** – Enter in 10-digit number.

   - **Regional Options –** This allow you to set the time zone and date format for your workstation. For example, if you work in a different time zone than your supervisor or Company Headquarters, you may want to configure your settings to match their time zone and date format.

2. **Help –** This contains the complete Supervision Manager User's Guide.

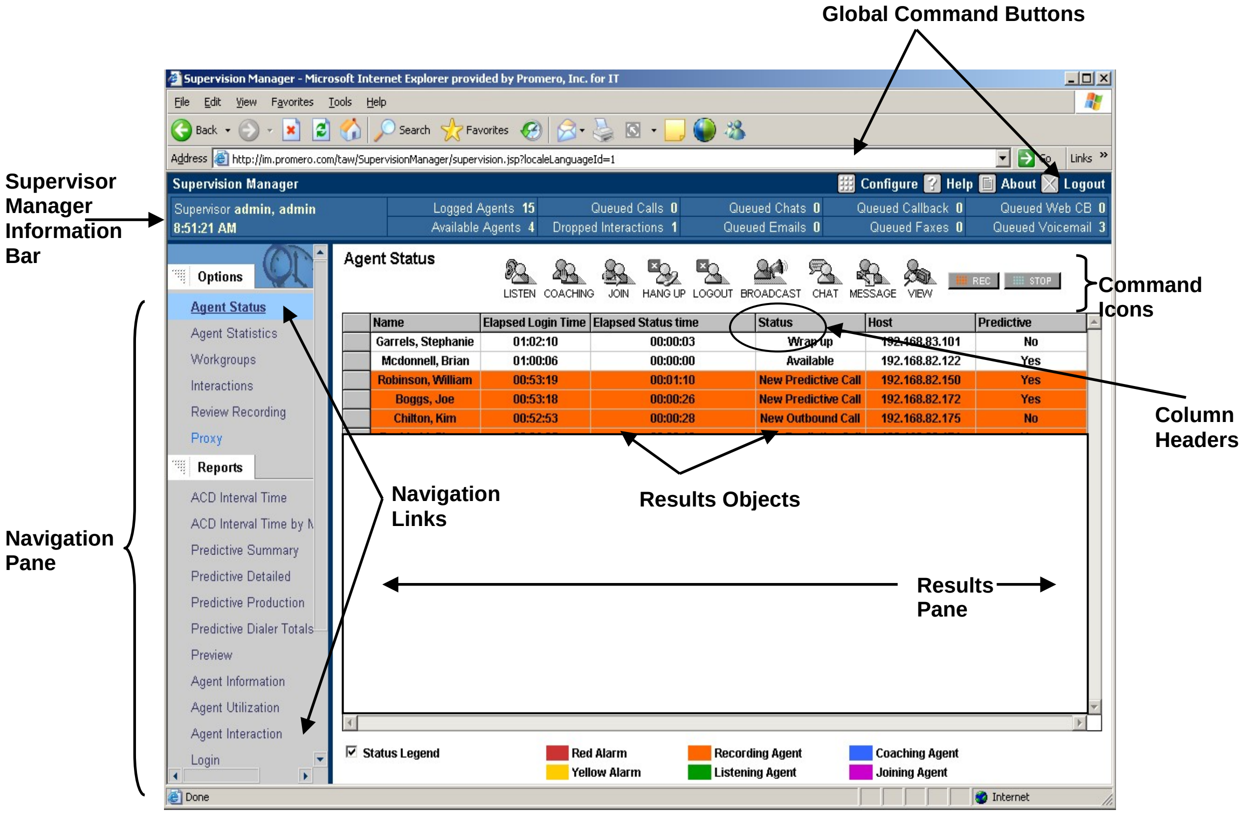
3. **About** –This is the copyright notice from Telephony.

4. **Logout** – It is extremely important that you click out logout when not using the system.

IV. Agents Status Screen

- **Layout of the Agent Status Screen**

Figure 1 – Typical Agent Status Screen Being Viewed by a Supervisor



V. Working with the Supervision Manager

1. Navigating in the Supervision Manager

- Clicking the links in the **Navigation Pane** allows you to navigate within the Supervision Manager.

- Clicking a link from the **Navigation Pane displays** the **Results Pane** exposing additional information allowing you to select an object to work with by clicking the command icons to perform a task. The Results Pane displays information in a tabular form; you can click the column headers to sort the results by the contents of that column. (Refer to figure 1.)

- **Clicking Status** in Column Headers allows you to group like statuses together. (Refer to Figure 1.)

- **Results Objects** window (refer to Figure 1) is where you would view the real-time activity of your agents that are logged into the system.

- **The Supervision Manager Information Bar (**refer to Figure 1) is where you can see the number of agents logged into the system, the number of available agents, the number of calls in Queue, Dropped Interactions, number of interactions in queue, etc.

- **The Status** column (refer to Figure identifies the status of an agent; i.e.; available, last call, predictive call, wrap-p, etc.

  - Wrap-up status is set in the **Administration Manager**. This allows the Agent to wrap up his interaction with a customer. Once the wrap time expires, CenterCenter@nywhere automatically switches his status and available; thus allowing more interactions (call) to be routed to that agent. Setting wrap up time enables you to run an Outcomes Statistics report. Statistics are current as of midnight the previous day.

  - **Within the Interaction Manager** (The Agent's console in CenterCenter@nywhere) agents can control their own statues by clicking **Change Status** in the Personal Options window and selecting a new status from the drop down list. For example, they can change their status from Available to Out of Office. Statuses are identified in the Administration Manager.

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1. Navigating in the Supervision Manager (Continued)

- **Command Icons** (refer to Figure 1).

- **Listen** – The supervisor has the ability to be a “fly on the wall” and listen to a conversation between an agent and customer without them being aware you are listening.
- **Coaching –** A supervisor can coach an Agent without the Customer hearing you. This option is great for training purposes.
- **Join -** The Supervisor can join the call as a 3rd party. The agent’s row turns purple to identify the agent you are speaking with.
- **Hang Up** - The Supervisor can disconnect a caller from the Agent.
- **Log Out** - The Supervisor can log the agent out and, if necessary, change his password. The agent will not be able to log into the system until you give him login permissions.
- **Broadcast** – This option allows you to send a text message to all agents.
- **Chat** – Selecting Chat allows the supervisor to initiate a text-based chat with an agent. Type your message in the window and click Send. The agent does **NOT** have to be engaged in an interaction in order to initiate a chat.
- **Message** – This option initiates a one-way message to an agent.
- **View** - The Supervisor can maintain a real-time 360 degree view of an agent’s desktop. Explain they can click **Remote Control** button, the supervisor can take control of an agent’s desktop.
- **Rec** – **The** supervisor can **record an Agent** by clicking on his name and clicking the rec icon.
- **Stop** – **Click** stop to end recording of an Agent.

NOTE: There are 3 ways to record:

1. The Agent can record his own interactions. (Needs to inform caller and ensures recording is allowed in caller’s state.
2. A supervisor can record interactions.
3. Automatic recordings can be set by the Administrator.

2. Agent Statistics

- **Click Agent Statistics** in the Navigation Pane (refer to Figure1).
- The Agent Statistics displays the number of interactions each agent has handled since being logged into the system.

Figure 2 – Agents Statistics

Agent Statistics

Name	Work group	Chat	Email	Fax	Inbound	Inb. Ext.	Outbound	Out. Ext	Work group Voice mail	Callback Call	Web Callba ck	Preview	Predictive
Burchert, John	0	0	0	0	0	0	0	0	0	0	0	0	0
Mcdonnell, Brian	0	0	0	0	0	0	66	0	0	0	0	0	197
Rockhold, Shawn	0	0	0	0	0	0	7	0	0	0	0	0	215
Garrels, Stephanie	0	0	0	0	2	0	55	0	0	0	0	0	25
Johnson, Steven	0	0	0	0	0	0	0	0	0	0	0	0	0
Johnson, Steve	7	0	0	0	2	0	5	0	0	0	0	0	0
Poulsen, Corey	0	0	0	0	0	0	0	0	0	0	0	0	0
Engelby, Brian	0	0	0	0	5	0	20	0	0	0	0	0	132
Chiusano, Robert	6	0	0	0	4	0	0	0	6	0	0	0	0
Maple, Nate	1	0	0	0	0	0	1	0	3	0	0	0	79

Column Headers

- **Agents Statistics Definitions –** Refer to Table 1 on next page.
- Clicking any column header will sort that column based on the contents of that column. **For example, clicking Workgroup** sorts all of the queued calls Agents have handled for their workgroup.

2. Agent Statistics (Continued):

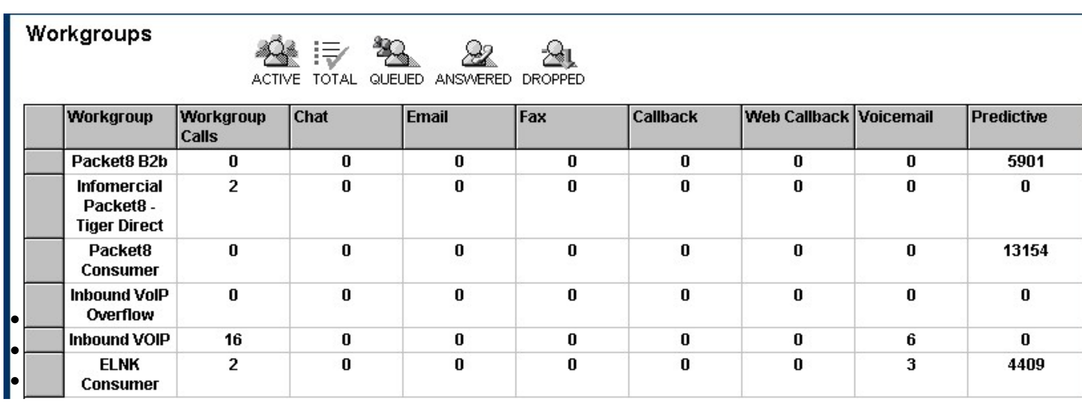
Table 1 - Agent Statistics Definitions

Column	Description
Name	Agent's last and first name.
Workgroup	Number of queued calls the agent handled for the Workgroup.
Chat	Number of Chat interactions the agent handled.
Email	Number of Email interactions the agent handled.
Fax	Number of Fax interactions the agent handled.
Inbound	Number of direct-dialed (non-queued) calls the agent handled.
Inb. Ext.	Number of calls agent handled from other agents.
Outbound	Number of outgoing (outside the Call Center) the agent handled.
Out Ext.	Number of calls agent placed to other agents.
Workgroup Voice-mail	Number of Workgroup Voice-Mail interactions agent has handled.
Callback Call	Number of callback requests the agent handled. These are calls from customers that opted not to wait in a workgroup queue.
Web Callback	Number of Web Callback requests the agent handled.
Preview	Number of Preview Project calls the agent handled. These are calls tied to a particular project.
Predictive	Number of Predictive Project calls the agent handled.

3. Workgroups

- **Clicking Workgroups** from the Navigation Pane displays the Workgroups Statistics window. Here you can view the number of each type of interaction each Workgroup has handled.

Figure 3 – Workgroup Statistics Screen



Workgroup	Workgroup Calls	Chat	Email	Fax	Callback	Web Callback	Voicemail	Predictive
Packet8 B2b	0	0	0	0	0	0	0	5901
Infomercial Packet8 - Tiger Direct	2	0	0	0	0	0	0	0
Packet8 Consumer	0	0	0	0	0	0	0	13154
Inbound VoIP Overflow	0	0	0	0	0	0	0	0
Inbound VOIP	16	0	0	0	0	0	6	0
ELNK Consumer	2	0	0	0	0	0	3	4409

- **Click on column headers** to perform searches by column heading.

3. Workgroups (Continued)

- **You** can view **five different Workgroup statistics screens.**
- **Workgroup Statistics options**:

- ➢ Active Interactions shows all interactions currently being handled by each workgroup.
- ➢ Total Interactions displays all interactions that have been handled by each workgroup.
- ➢ Queued Interactions displays all interactions currently in the queue for each workgroup.
- ➢ Answered Interactions displays the number of interactions answered by each workgroup.
- ➢ Dropped Interactions displays the number of dropped interactions by each Workgroup**.**

Table 2 - Workgroup Statistics Definitions

Column	**Description**
Workgroup	Name of Workgroup.
Workgroup Calls	Number of calls the workgroup handled.
Chat	Number of Chat interactions the Workgroup handled.
Email	Number of Email interactions the Workgroup handled.
Fax	Number of Fax interactions the Workgroup handled.
Workgroup Voice-mail	Number of Workgroup Voice-Mail interactions agent has handled.
Callback	Number of callback requests the Workgroup handled. These are calls from customers waiting in the workgroup queue.
Web Callback	Number of Web Callback requests the Workgroup handled.
Voicemail	Number of Voicemail interactions received by the workgroup.
Predictive	Number of Predictive Project calls the Workgroup handled.

4. Interactions

- **Click Interactions** in the Navigation Pane.

- **The Interaction Statistics** screen displays the number of each type of interaction each Workgroup is currently handling. Refer to below figure.

Interactions

Figure 4 – Interactions Screen

Column Headers

Agent	To	From	Project	Workgroup	Call Type	Elapsed Time	Queued
Eichelberger, Travis	6735	8477241337	EarthLink Sales 1-877-868-673 5	ELNK Consumer	NEW WORKGROUP VOICEMAIL	50:20:10	23:0
Clark, Jack	3606946298	1213	EarthLink ETV DSL PAC 1 11am to 11pm	ELNK Consumer	NEW PREDICTIVE CALL	00:30:07	00:00:04
Engelby, Brian	8284662087	1153	__PACKET8 DECEMBER TANK 11am to 8pm	Packet8 B2b	NEW PREDICTIVE CALL	00:24:43	00:00:02
Boggs, Joe	9195421975	Boggs, Joe	800-868-0746 LIFE Packet8 - TigerTV	NA	NEW OUTBOUND CALL	00:18:01	00:00:03
Boggs, Joe	1135	4088566347	Packet8 Sales 1-877-868-113 5	NA	NEW INBOUND CALL	00:17:54	NA
Jones, Jermaine	3039878565	659	8x8 CD Data MTN-PAC B 11am to 10pm	Packet8 Consumer	NEW PREDICTIVE CALL	00:11:22	00:00:01

Table 3 – Interactions Statistics

Column	Description
Agent	Name of agent handling the interaction.
To	The outgoing telephone number.
From	The incoming telephone number.
Project	The name of the Project handling the interaction.
Workgroup	The name of the Workgroup handling the interaction.
Call Type	The type of this interaction. The call type could be: • Inbound Call - Call made directly to agent's extension • Outbound Call - Call made by Agent to an outside line • Predictive Call - Predictive Project call • Inbound Extension - Call received by agent from another agent in the Call Center • Outbound Extension – Call made by agent to another agent I the Call Center • ACD Call - A call routed to a agent by CenterCenter@nywhere • ACD Web Callback -A web callback request routed to the agent • ACD Callback - A requested callback routed to an agent • ACD Webphone - Voice over IP call routed to an agent • ACD Chat - A chat interaction routed to an agent • ACD Email -An email interaction routed to an agent • ACD Voice-mail - A voice-mail interaction routed to an agent • ACD Fax - Fax interaction routed to an agent
Elapsed Time	The interaction's length of time in HH:MM:SS format.
Queued Time	The length of time the interaction spends in the queue before being handled.

5. Review Recordings

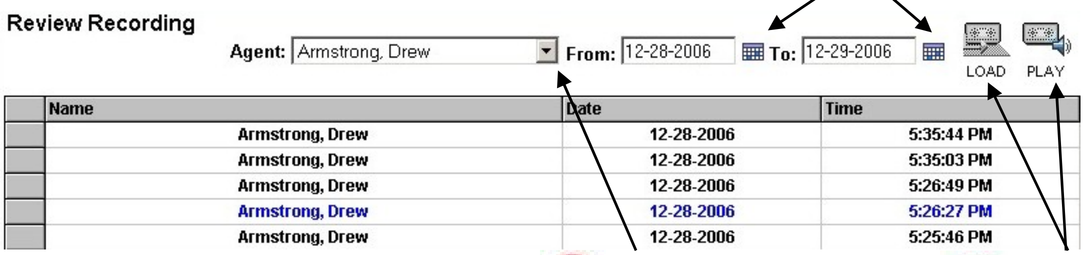
- The Review Recording functions allows the Supervisor to play a previously recorded conversation of an agent handling an interaction. This recording is automatically saved in the CenterCenter@nywhere database.

- **Clicking** Preview Recording from the Navigation Pane. Displays the Review Recording screen.

- **Agent Recordings:**

  1. **Select the Agent's name** from the Drop Down List. This list consists of previously recording of this agent. Once selected, the recordings for this agent displays in the Results Pane Window.

Figure 4 – Demonstrating Agent Recording



2. **Selecting Date Range for Recording:**

   - **Click** the Calendar icon in the **From**: Field and select a start date for recording. **While** in the calendar,

     - To go **back one year**, click '<<'
     - To go **back one month**, click '<'
     - To go **ahead one year**, click '>>'
     - To go **ahead one month**, click '>"

   - **Click** the Calendar Icon in the **To** field and select a recording end date. Again for documentation purposes, 12-29-2006 was selected. You may need to select another day.

3. **Listening to Recording:**

   - **Click Load** - This will load the agent recordings chosen in number 1 above and display them in the Results Pane.
   - **Select** a recording from the displayed list. (refer to Figure 4).
   - **Click Play** – The recording will play for the date range you chose. Use Microsoft Media Player to listen (or any MP3 player). Microsoft Media Player launches. **Play a few seconds** of the recording for the demonstration.

6. Reports

- CenterCenter@nywhere provides supervisor's the ability to view graphical reports helping them to understand the trends, activities and Agent performance within their Call Centers. They have the ability to generate reports that assist them in analyzing several characteristics of their Company's Call Center, including:
    - Agent activity, performance, and efficiency
    - Interaction statistics
    - Project billing and cost details
    - Outcome of Predictive calls
    - Weekly Project Schedules

1. Click Reports from the Navigation Pane
2. Select Report to run from the Reports Menu
3. Click View

7. Statistics

- As a supervisor you can view real-time statistical reports you can view for the call center, including:
    - Agent Statistics
    - Workgroup Statistics
    - Interaction Statistics

- In addition to real-time statistics, you can view historical reports provided by your CenterCenter@nywhere Administrator

1. Click Statistics in the Navigation Pane.

2. Table 4 explains each statistic available for your review.

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Table 4 - Statistics

Report	Description
Predictive	Displays the current status of the Predictive Project that the Supervisor is assigned to.
Predictive Dialer Totals	Displays the current status of all Predictive Projects.
Preview	Displays the Preview Dialing Statistics for Projects they are assigned to.
Outcome Statistics	Display real time results of Interactions based on Agent, Interaction, Agent's average Interactions received per hour, length of interaction, how long the interaction was in the queue, etc.
Real-time Statistics	Displays real time dialer information relating to a project

- **Viewing Statistics**

ACTION:

- **Select Predictive** from Statistics within the Navigation Pane.

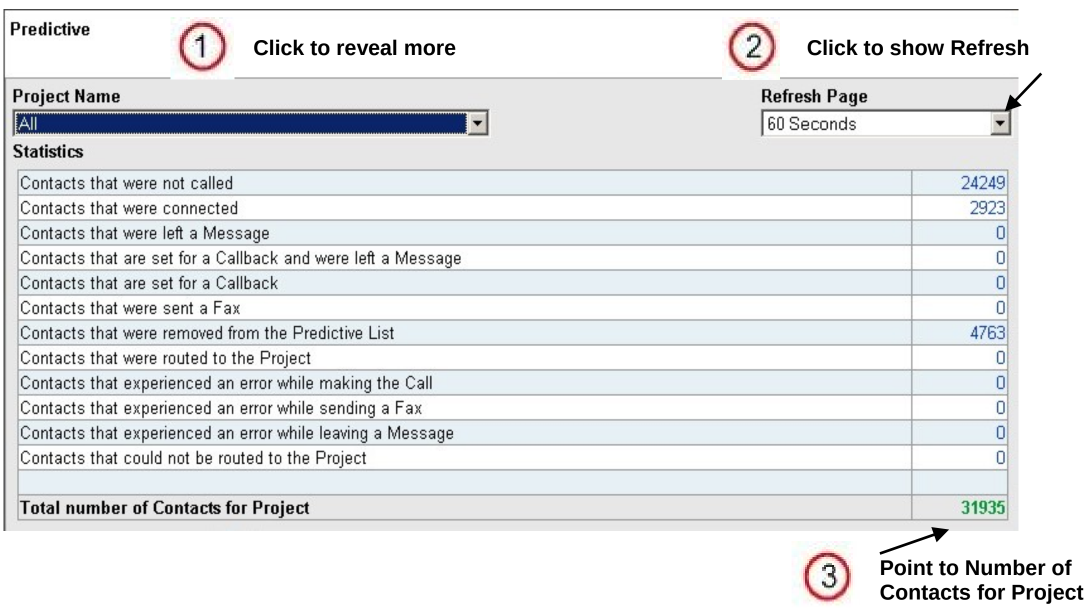
  The Predictive Statistics results display in the Results Pane.

  1) **Click** the down arrow in **Project Name** Window to select the various Predictive Statistics by Project Name.

  2) **Click** the down arrow in **Refresh Page** window to select different Refresh times.

  3) **Note the** Total number of Contacts for Project.

Figure 8 – Viewing Statistics



- **Viewing a Statistics (Continued)**

  - **Click Real-time Statistics** from Statistics within Navigation Pane

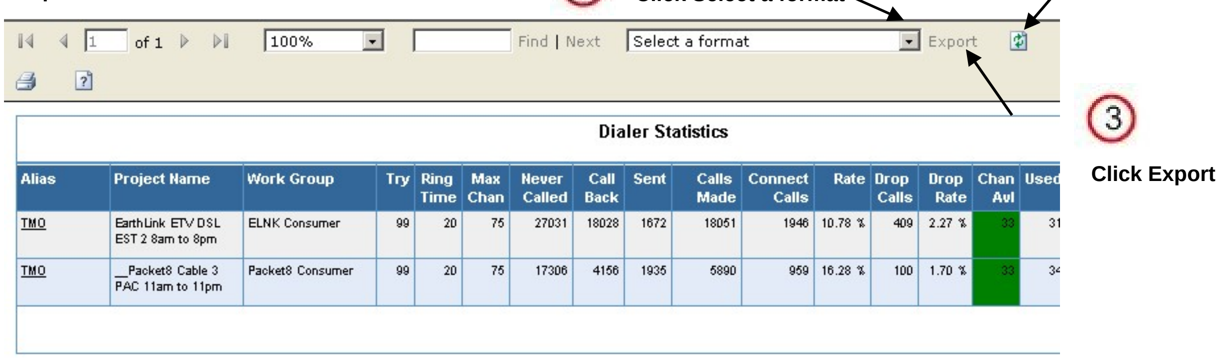
  - This is real-time statistics on the Predictive Dialer by Project.

- **Exporting Statistics to Excel**

  ➢ **Click the Refresh Icon** to refresh report to get latest results.

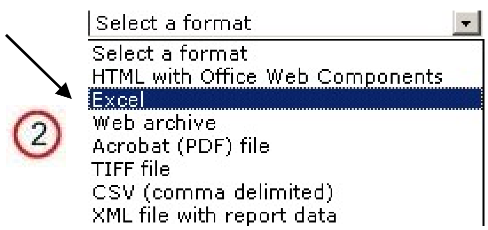
  1) **Click** down arrow in **Select a format window**.

Figure 9 – Exporting Statistics Report to Excel



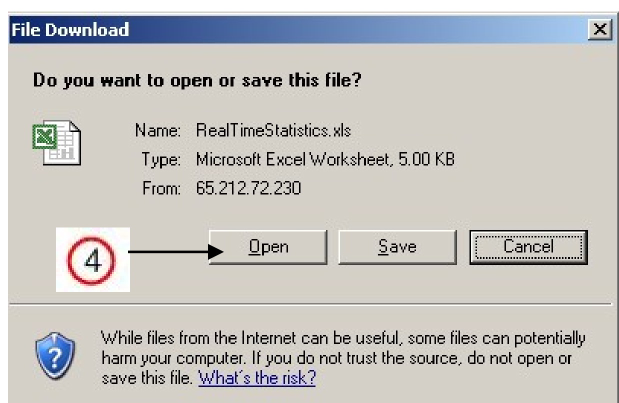
Alias	Project Name	Work Group	Try	Ring Time	Max Chan	Never Called	Call Back	Sent	Calls Made	Connect Calls	Rate	Drop Calls	Drop Rate	Chan Avl	Used
TMO	EarthLink ETV DSL EST 2 8am to 8pm	ELNK Consumer	99	20	75	27031	18028	1672	18051	1946	10.78 %	409	2.27 %	33	31
TMO	__Packet8 Cable 3 PAC 11am to 11pm	Packet8 Consumer	99	20	75	17306	4156	1935	5890	959	16.28 %	100	1.70 %	33	34

  2) **Select Excel**.



  3) **Click Export** (Refer to above Figure 9).

  4) **Click Open** in the File Download window. **It** is always a good idea to view (open) the report prior to saving to ensure it is what you want.



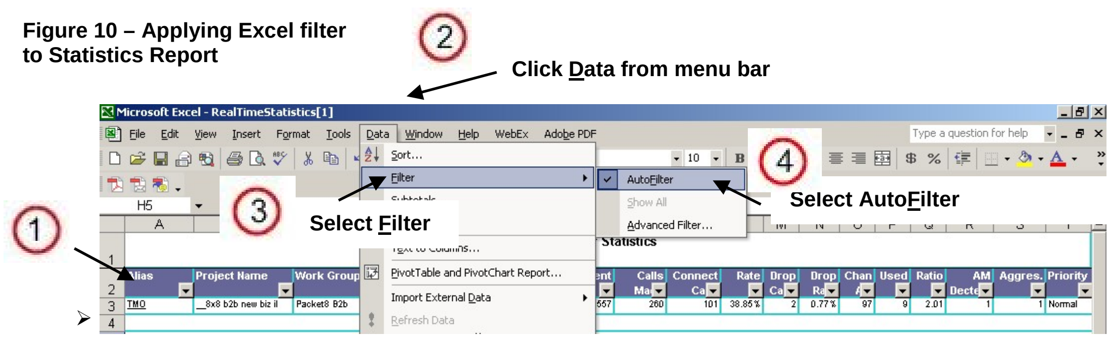
- **Exporting Statistics to Excel (Continued)**

  The report opens in Excel.

  ➢ **Applying a filter for sorting purposes:**

  1) **Click the header** row in the Excel Report. (The header consists of the column headings.)
  2) **Click Data** from Excel's top menu bar.
  3) **Select Filter.**
  4) **Select Auto Filter.**

Figure 10 – Applying Excel filter to Statistics Report



➢ **Save** the Report to their local drive.

➢ **Click File** from the Excel Menu bar.

➢ **Click Save As.**

➢ **Select a location in Save Window.**

➢ **Enter a valid filename** (can use existing name).

➢ **Click Save.**