

InConcert Allegro



Administration

Manual



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Administrator Functions

The administrator of a Virtual Contact Center (VCC) is the person responsible for the creation of users, uploading files, create and edit campaigns, groups and workgroups.

The administrator has access to all the resources for the VCC and distributes the permissions among the different users so that objectives can be achieved.

Login

In order to login to the administrator'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/dashboard>

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 administrator 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.

If you wish to change your password, please refer to page 32 of this manual.

Main view of the Administrator Panel

The following administrator's panel represents the main view of the ADMINISTRATION tab of InConcert Allegro.

The screenshot displays the Allegro Administrator Panel. The top navigation bar includes 'Administration', 'Outbound Engine', 'Reports', and 'Media Player'. The left sidebar contains a menu with categories: Campaigns (All Campaigns, Inbound Campaigns, Outbound Campaigns, Chat Campaigns, Mail Campaigns), Users (All Users, Agents, Users by Group), Groups (Groups), Resources (Multimedia Resources), Configuration (Workgroups, Custom States, Skills), Settings (Personal Settings), and History (All Histories). The main content area is titled 'Administration Campaigns' and features a search filter set to 'Default'. Below the search fields are buttons for 'Refresh', 'Clear', and 'Save'. A table lists the current campaigns:

Name	Description	Is Valid	Is Active	Wrap-Up	Start Date	End Date	
InfoLine	General info line	✓	✓	✓	1973-01-01	2020-01-01	[edit] [delete]
SellingType	Special selling to asia	✓	✓	✓	1973-01-01	2020-01-01	[edit] [delete]
SpecialPromo	Vip Promos	✓	✗	✓	1973-01-01	2020-01-01	[edit] [delete]
Support	Main support	✓	✓	✓	1973-01-01	2020-01-01	[edit] [delete]

At the bottom of the table, there is a 'Page 1 of 1' indicator and a 'Go to Page' field. A 'New Campaign' button is located at the bottom left of the main content area.

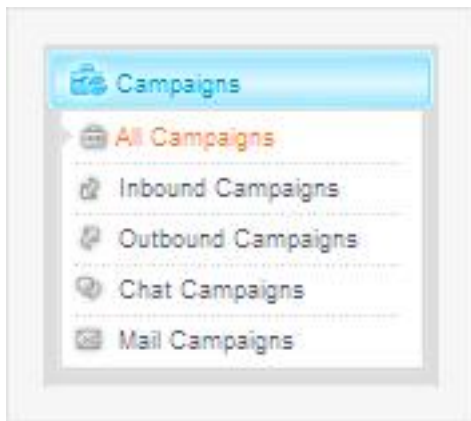
As can be seen in the screenshot, the main view of the Administrator's panel shows the current campaigns and the campaign menu.

To the left, the administrator's tab contains 7 sub menus that include:

- ▶ Campaigns
- ▶ Users
- ▶ Groups
- ▶ Configuration
- ▶ Resources
- ▶ Settings
- ▶ History

By clicking on each menu on the left side of the screen, the Administrator will be able to configure and edit the different resources and elements required for the proper functioning of the VCC.

Campaigns Menu



The first menu to the left is the “Campaigns” menu. Here, the administrator will be able to:

- ▶ Visualize already existing campaigns by type
- ▶ Create new campaigns
- ▶ Edit already existing campaigns

As the figure shows, the administrator can see either all the existing campaigns, or she can visualize the different campaigns by type. For example, if there are 20 campaigns of which 5 are Chat Campaigns for edition, then clicking on “Chat Campaigns” the administrator will only see chat campaigns, and will be able to easily access the 5 campaigns for edition.

Before we continue with the different functions of the Allegro Administrator interface, we’ll see functions that repeat themselves in all of the subsequent menus:

Filter

You can use this tool to define search parameters in order to identify the one or more previously set configurations for each menu.

After introducing the desired values in each field, click on the “Refresh” button to retrieve the desired data.

The “Clear” button resets all fields, whereas the “Save” button saves the parameters of the search for future reference.



Edit

The edit button appears in all the menus, and can be used to edit the settings of each component.

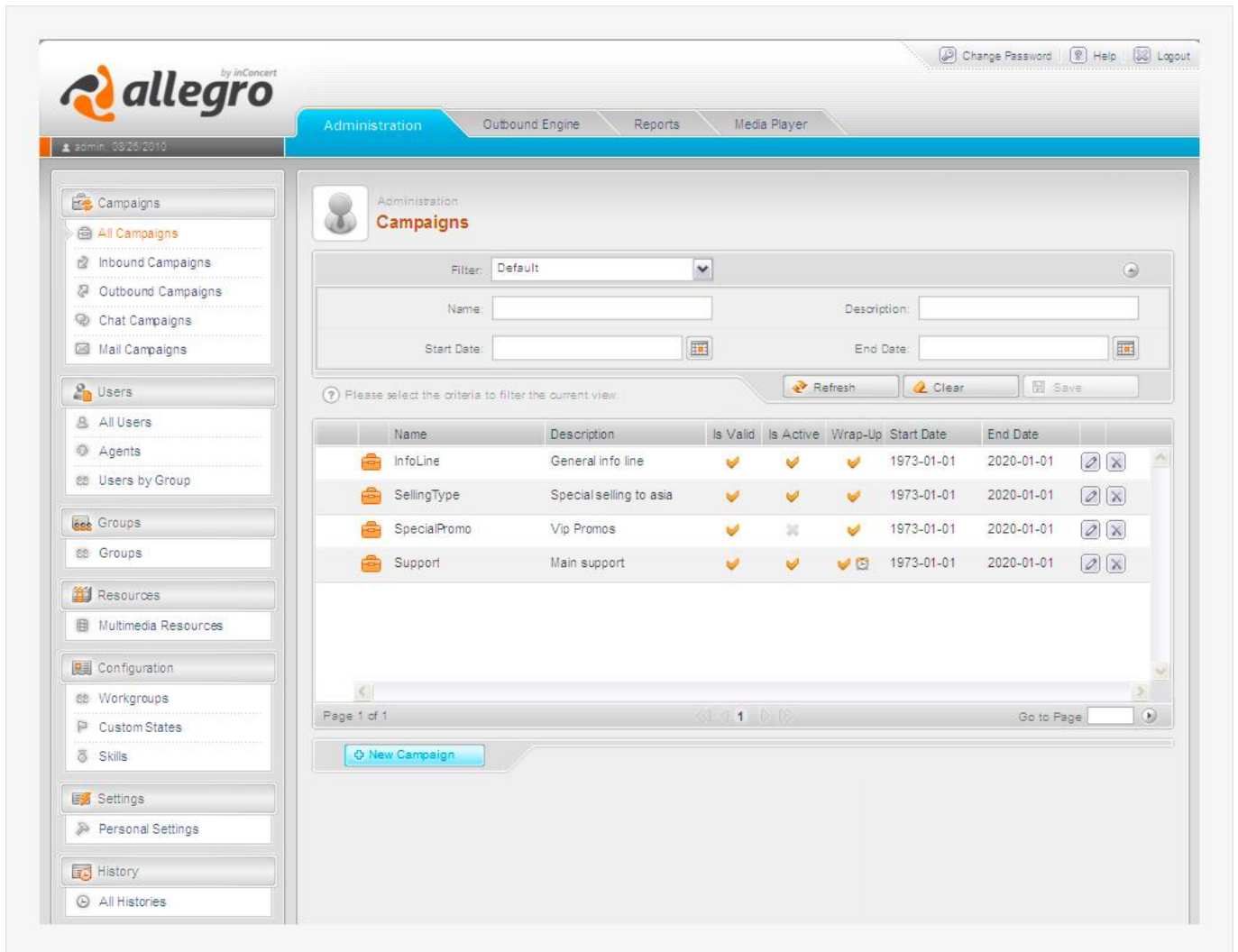


Delete

The delete button also appears in all the menus, and serves the purpose of deleting unwanted or misconfigured components.

Creating a new Campaign

In the main campaign view, there's a “New Campaign” button below the campaign list. In order to create a new campaign, we need to click on that button.



After clicking on the “New Campaign” button, a new set of menus with several commands will appear.

These menus consist of:

- ▶ Campaign Information
- ▶ Campaign Skills
- ▶ Multimedia Resources
- ▶ Activation Scheduler
- ▶ Agents
- ▶ Campaign Supervisors
- ▶ Campaign Interactions
- ▶ CTI Popup Configurations
- ▶ Campaign History

Each menu contains fields to configure the new campaign.

IMPORTANT NOTE

InConcert Allegro works much like a database establishing relationships between different fields. If the field is wrongly defined, then the system won't be able to relate the fields properly. If this happens, the interface will warn the administrator of the errors.

All mandatory fields are marked in the interface with a small orange bar next to the textbox. Fields without the orange bar are not mandatory but usually can help the administrator when the time comes to filter information.

Campaign Information

The campaign information screen contains the main fields that will end up identifying the campaign in the main view screen.

The screenshot shows the 'New Campaign' administration interface. The 'Campaign Information' tab is selected, displaying the following fields:

- Name:** A text input field with a red asterisk indicating it is required.
- Description:** A text input field.
- Callback is Allowed:** A checkbox that is checked.
- Campaign is Always Valid:** A checkbox that is checked.
- Campaign Time Zone:** A dropdown menu.

Below the main fields is the 'After-Interaction Work' section:

- Work After the Interaction:** A checkbox that is checked.
- Work Time:** A dropdown menu currently set to 'Not time limited'.
- Work Time Limit:** A text input field.
- Finish Button Enabled:** A checkbox that is checked.

The left sidebar contains the following tabs:

- Campaign Skills
- Multimedia Resources
- Activation Scheduler
- Agents
- Campaign Supervisors
- Campaign Interactions
- CTI Popup Configuration
- Campaign History

At the bottom right of the form are two buttons: 'Save' and 'Discard'.

In the campaign information tab we'll see the following fields:

- ▶ **Name:** denotes the campaign name. It only accepts alphanumeric characters and “_”. This field is mandatory, and will not be editable in the future, so make sure there aren't any typos or other kind of errors.
- ▶ **Description:** here the administrator can write a brief description for the campaign. For example: “Calls from potential clients”. This field is not mandatory.

- ▶ **Callback Allowed:** if checked, the agents will be able to schedule calls to answer any kind of interaction, whether it's chat, mailing, etc. This option can only be checked if the campaign has outbound calls allowed.
- ▶ **Campaign is always valid:** if checked, the campaign will have no start or ending date. It will be operational since the first time the administrator clicks on the "Save" button. To see how to create a campaign valid only for a limited amount of days, please check Activation Scheduler.
- ▶ **Campaign Time Zone:** this field sets the time zone for which the campaign will be operational. For example, for a campaign operational in New York City, we need to select (UTC – 05:00) U.S. Eastern Standard Time. This field is mandatory.
- ▶ **Work after the interaction:** if checked, this will allow agents to perform tasks after having had the interaction with the client.
- ▶ **Work Time:** offers two options, "Time limit", and "No time limit". If the desired option is "Time limit" the administrator will have to include a timeframe for the After Interaction Work. This field is mandatory.
- ▶ **Work Time Limit:** it's the number of seconds the agent is allowed to perform the after interaction work. This field is mandatory.
- ▶ **Finish button enabled:** enables an icon for the agent to click once the after interaction work is completed.

IMPORTANT NOTE ON THE FINISH BUTTON

This button always needs to be enabled, excepting some special cases that will be referred to in the Integration Manual.

Campaign Skills

Administration
New Campaign

Campaign = Fields with an indication are required

Campaign Information

Campaign Skills

<input type="checkbox"/>	Name	Description	Skill Weight
<input checked="" type="checkbox"/>	English	English speaking	10
<input type="checkbox"/>	French	French speaking	1
<input type="checkbox"/>	German	German language abilities	1
<input checked="" type="checkbox"/>	Marketing	Marketing habilities	5
<input type="checkbox"/>	Spanish	Spanish speaking	1
<input type="checkbox"/>	Technology	Technology knowledges	1

Cells with an indication are editable, please double click to modify the value

As can be seen in the screenshot above, for this particular campaign the necessary skills are Marketing with a relative weight of 5, and English, with a relative weight of 10.

This screen shows the different available skills for each campaign. The administrator will be able to allocate different “weight” to each skill, ranging from 0 to 10 in each case. Being 1 the least important skill, and 10 the most important ones.

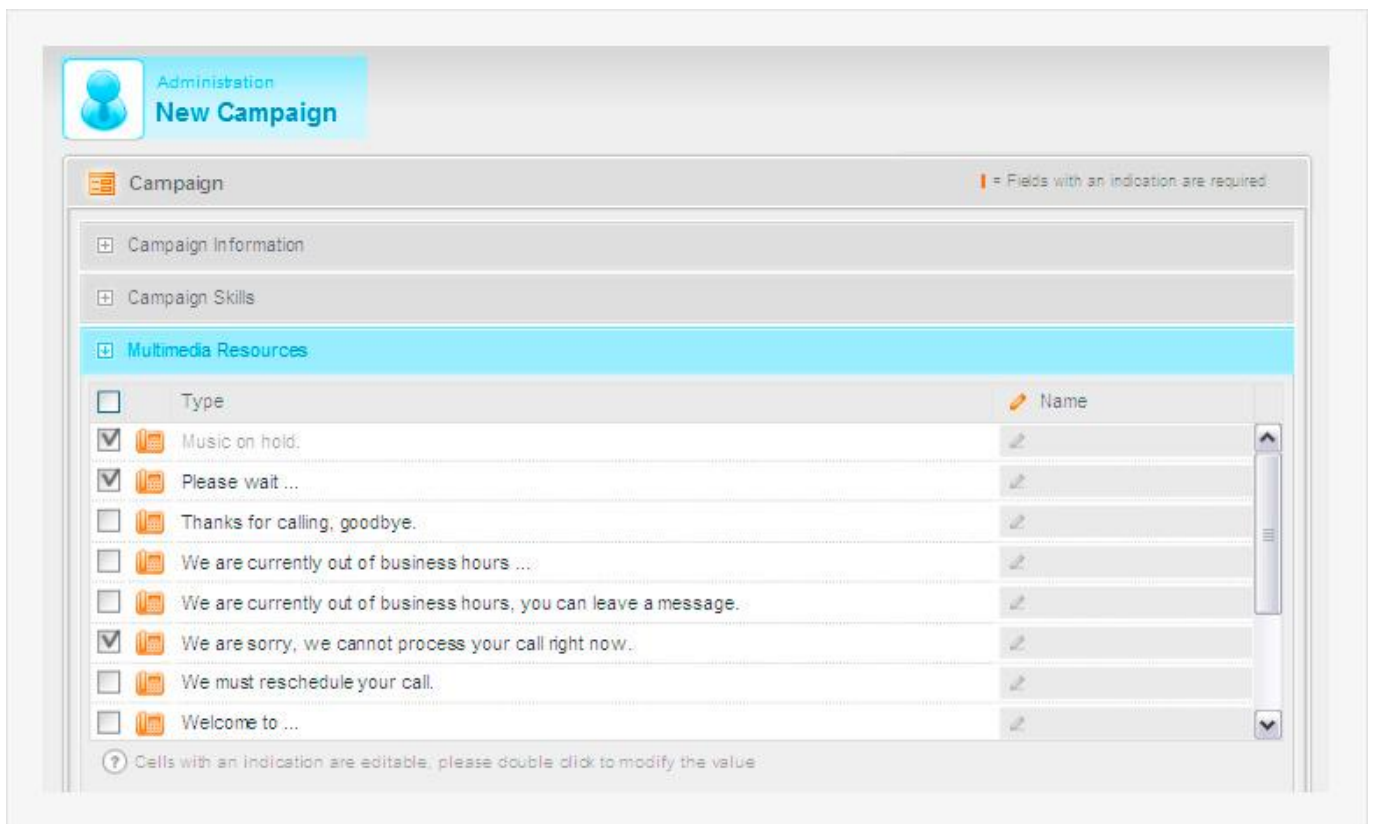
If there are some unnecessary skills in the panel, then the administrator will not check their boxes.

For example: the necessary skills for my new campaign are English, Marketing and Technology. Then I will proceed to check the boxes in those skills and click on save.

If the campaign requires a skill that is not available in the list, then the administrator needs to create one in the Configurations Menu. Please see Configurations Menu on page 49.

Multimedia Resources

In this screen the administrator can configure the different resources that will be available for the Campaign.



In this case, the administrator will be able to check the different boxes to make the recordings available for the campaign. For example: music on hold, greeting recording, etc.

As can be seen in the screenshot above, we've selected Music on Hold, and by double clicking on the gray rectangle to the right, we chose the desired track. We've also selected "We are sorry, we cannot process your call right now".

If there's a need for a new recording, then the administrator needs to upload it to the system. This can be done accessing the Resources Menu. Please see page 45 for instructions.

Activation Scheduler

The next step for the administrator is to set up the Activation Scheduler. Once we click on this tab, the following screen will appear.

The screenshot shows the 'New Campaign' interface with the 'Activation Scheduler' tab selected. The interface is divided into several sections:

- Campaign Information:** Campaign Name, Start Date, End Date, and Status.
- Campaign Skills:** A list of skills to be associated with the campaign.
- Multimedia Resources:** A list of multimedia resources to be associated with the campaign.
- Activation Scheduler:**
 - Scheduler Global Configuration:** A section for setting the global configuration for the scheduler. It includes a date range selector (Monday, 00:00 to 00:00) and a table for selecting days and hours when the scheduler should be active. The table has columns for Day (Sunday to Saturday) and an 'X' icon for each day.
 - Special Dates:** A section for adding special dates. It includes an 'Action' dropdown (Add date range), a 'Date' field, a 'Reason or Comment' field, and a date range selector. Below this is a table with columns for Date, Reason, and When.

The first field is the Scheduler Global Configuration.

Here the administrator will be able to configure in which days of the week and at what time the campaign will be operative.

In “Add Date Range” the administrator will choose the days in which the campaign will be active by checking a box next to the desired days.

Once this is done, we can proceed to the configuration of the time in which the campaign will be operational.

If the campaign needs to be operative on Mondays from 9:00 to 19:00, then we need to select “Monday” in the Date range bar, and then select the hours that encompass the desired timeframe.

If the timeframe for the campaign is the same for every day, then the administrator can check the boxes for all days and afterwards will select from which hour to which hour the campaign will be operative.

If every day the campaign has a different timeframe, then the administrator will have to set up the timeframe day by day, by checking one day at a time and setting the schedule one by one.

To add exemptions or days in which the campaign will not be functioning, the administrator click on “Special Dates” and add a “Date exclusion”.

Here the administrator will be able to configure the days in which the campaign will not be operative, and can specify the reason for this. For example: “National Holiday”, “Office moving”, etc.

The interface also allows the dates to repeat themselves yearly, or check if it’s a one year only event.

Special Dates

Action:

? Select a date to override the global configuration.

Date Exception

Date:

Reason or Comment:

Add Date Range: : To : : To :

? Select date, hours range and a reason for overriding the day configuration.

Date	Reason	When	
2010-08-30	Special Discount	07:00/19:00	
2010-09-23	Ticket sale for the "Alan Parsons Project"	07:00/23:00	

If we use the Override Day Configuration, the selected dates will have a special working time that may not coincide with the normal working hours of the campaign.

For example, if we have a campaign for the sales of concert tickets, the administrator can extend the working hours for the day of the concert by overriding day configuration for that day.

Special Dates

Action: Date exclusion

? Select a date to override the global configuration.

Exclusion

Date:

Reason or Comment:

Repeat: Only This Year Yearly

? Select a date and write a reason or comment for the exclusion. Add

Date	Reason	When
2010-08-30	Special Discount	07:00/19:00
2010-09-23	Ticket sale for the "Alan Parsons Project"	07:00/23:00
10-17	International Holiday	Yearly

In this case we've added an international holiday to represent an exclusion, a day in which the campaign will not be operative.

The exclusions can be yearly or for one year only.

Agents

In the agent's screen the administrator will be able to choose which of the available agents will work on any given campaign.

The screenshot shows the 'New Campaign' administration interface. The 'Agents' section is active, displaying a search area and a table of agents. The search area includes fields for 'Id' and 'Name', and a 'Search' button. Below the search area is a table of agents with columns for 'User Id', 'Full Name', 'Phone', and 'Email'. Each row has a checkbox for selection. The table shows 11 agents on the current page, with a total of 222 agents available. The 'Selected Agents' section at the bottom shows '0 agents selected out of 222 available' and includes 'Check All' and 'Clear All' buttons.

<input type="checkbox"/>	User Id	Full Name	Phone	Email
<input type="checkbox"/>	amartinez	Agustina Martinez	1008	amartinez@masterselling.net
<input type="checkbox"/>	cronaldo	Cristiano Ronaldo	1013	cronaldo@masterselling.net
<input type="checkbox"/>	cson	Charles Son	1004	cson@masterselling.net
<input type="checkbox"/>	fhellenken	Fernick Hellenken	1003	fhellenken@masterselling.net
<input type="checkbox"/>	fmarton	Fred Marton	1019	fmarton@masterselling.net
<input type="checkbox"/>	hpeterson	Hellen Peterson	1020	hpeterson@masterselling.com
<input type="checkbox"/>	hreyes	Hugo Reyes	1014	hreyes@masterselling.net
<input type="checkbox"/>	hrodriguez	Hugo Rodriguez	1012	hrodriguez@masterselling.net

The administrator can choose the agents she wants to be working in each campaign

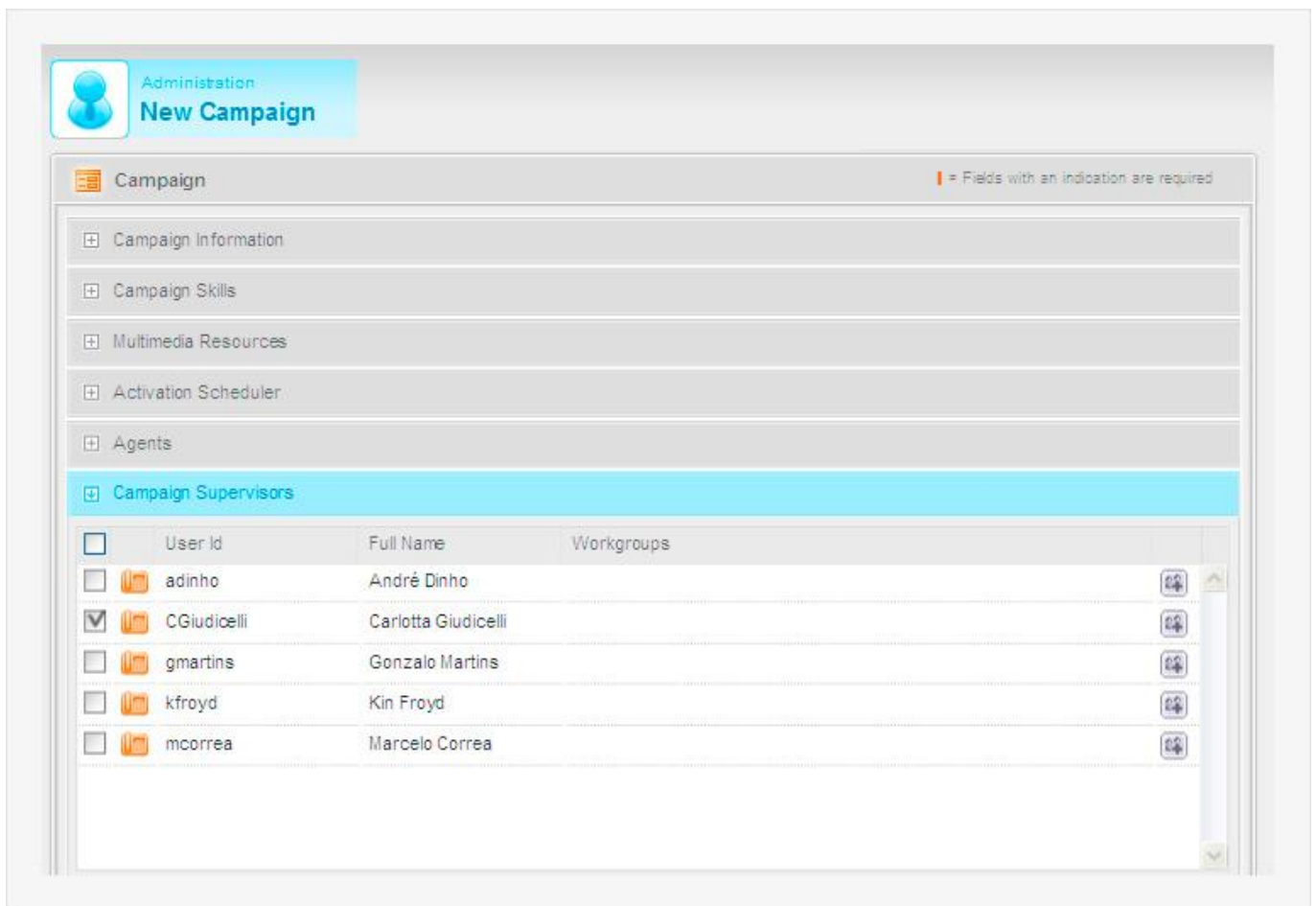
By checking the checkboxes to the left, the administrator selects the agents for each campaign. Once an agent is selected for a campaign, the same agent can be selected for other campaigns.

If the administrator checks the checkbox next to the "User ID" column, then the system will select all the agents in the same page view. The agent's view shows up to 20 agents in each page.

If the administrator clicks on the "Check All" button to the right, below the list, then the system will select all of the available agents, in all the different pages.

Campaign Supervisors

In this tab, the administrator can manage the supervisors, and choose who will supervise the campaign the administrator is creating at the moment.



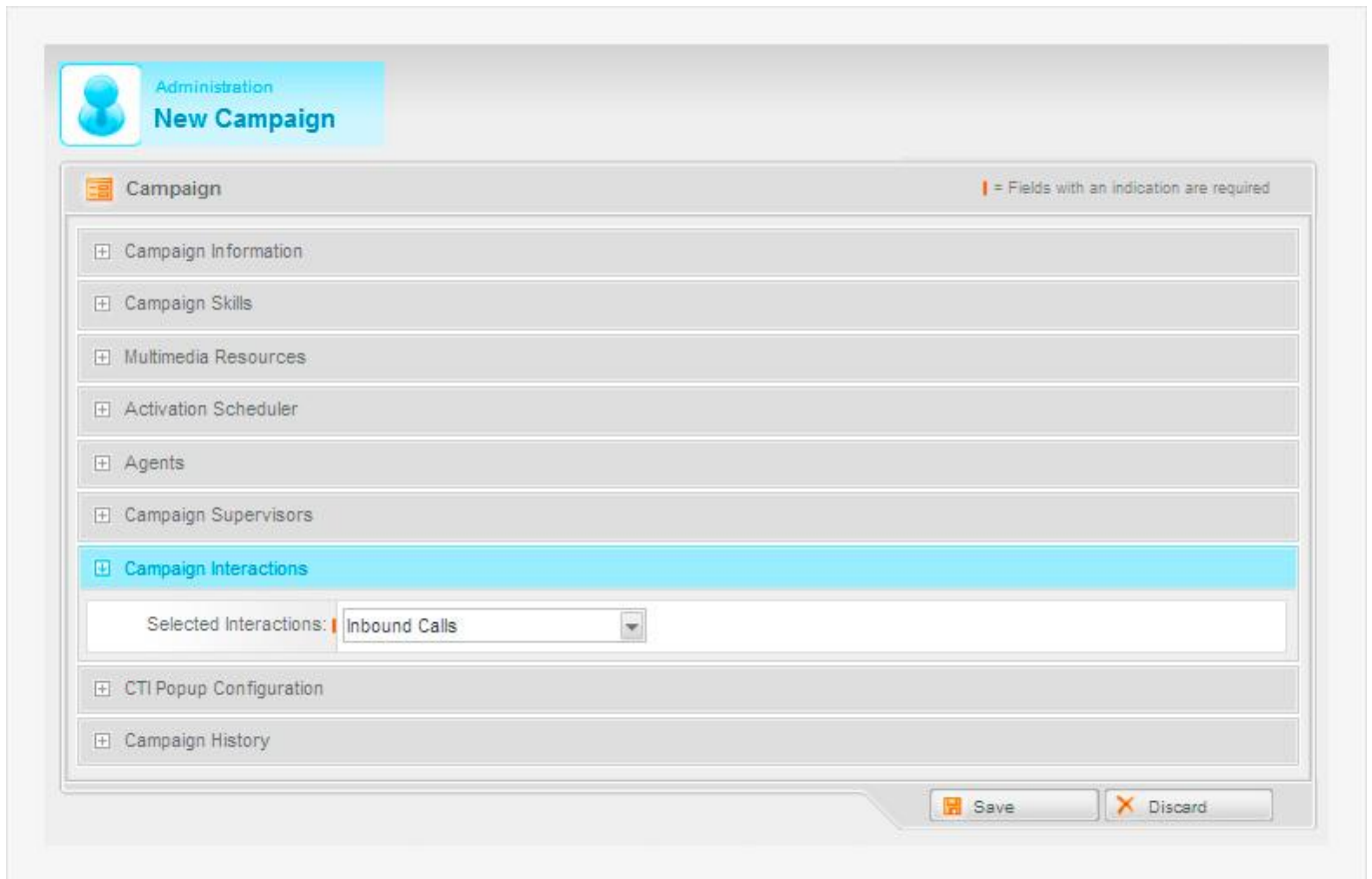
In this screen the administrator will choose which of the created supervisors will work in the new campaign.

The supervisors can be assigned to different workgroups. To assign a workgroup to a supervisor, click on the button to the right of each line and choose the workgroup. From the moment the administrator clicks on the save button, the supervisor will only have access to the files generated by the agents belonging to that workgroup.

If the administrator needs to create a new supervisor, then she will have to go to the “Users” menu and create a new supervisor. Please check page 37 for instructions.

Campaign Interactions

In this tab the administrator will be able to choose which interactions will be available for the new campaign.



The screenshot displays the 'New Campaign' administration interface. At the top left, there is a blue header with a person icon, the text 'Administration', and 'New Campaign'. Below this is a 'Campaign' section with a list of expandable tabs: Campaign Information, Campaign Skills, Multimedia Resources, Activation Scheduler, Agents, Campaign Supervisors, Campaign Interactions (highlighted in blue), CTI Popup Configuration, and Campaign History. The 'Campaign Interactions' tab is active, showing a 'Selected Interactions:' label and a dropdown menu with 'Inbound Calls' selected. A legend indicates that fields with an orange exclamation mark are required. At the bottom right, there are 'Save' and 'Discard' buttons.

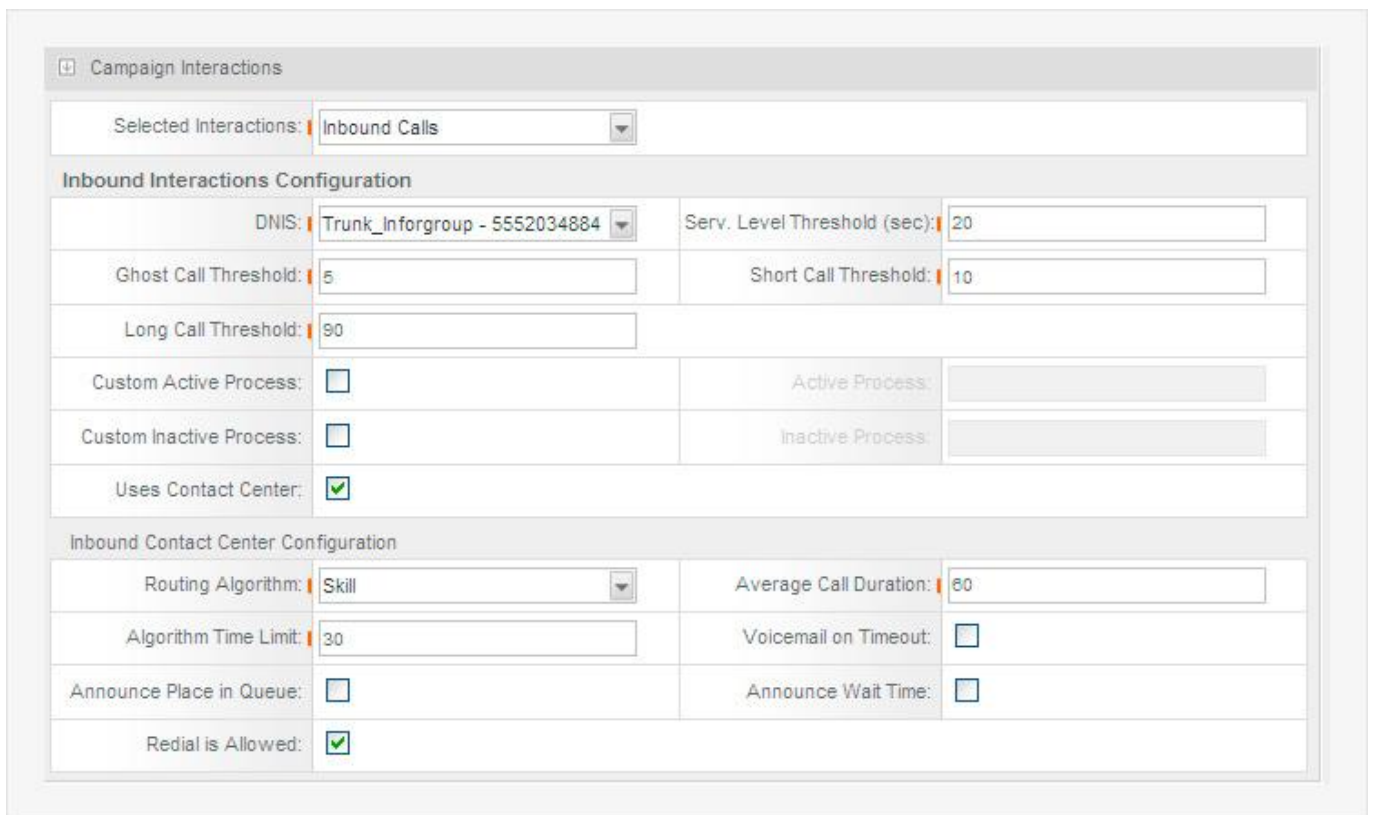
In this case, the administrator can choose in the “Selected Interactions” field, a group or all of the following interactions:

- ▶ Outbound Calls
- ▶ Inbound Calls
- ▶ Chat
- ▶ Mail

Once checked, the selected type of interaction will be available for the agents.

Inbound Campaigns

In order to configure an “Inbound Campaign” the administrator needs to click on the “Inbound Calls” checkbox. Once this is done, a new menu will appear, with several fields for configuration.



Campaign Interactions	
Selected Interactions:	Inbound Calls
Inbound Interactions Configuration	
DNIS:	Trunk_Infogroup - 5552034884
Serv. Level Threshold (sec):	20
Ghost Call Threshold:	5
Short Call Threshold:	10
Long Call Threshold:	90
Custom Active Process:	<input type="checkbox"/>
Active Process:	
Custom Inactive Process:	<input type="checkbox"/>
Inactive Process:	
Uses Contact Center:	<input checked="" type="checkbox"/>
Inbound Contact Center Configuration	
Routing Algorithm:	Skill
Average Call Duration:	60
Algorithm Time Limit:	30
Voicemail on Timeout:	<input type="checkbox"/>
Announce Place in Queue:	<input type="checkbox"/>
Announce Wait Time:	<input type="checkbox"/>
Redial is Allowed:	<input checked="" type="checkbox"/>

To generate the campaign properly, the administrator needs to configure and set the different fields.

- ▶ **DNIS:** will select the Dial Number Identification Service (DNIS) correspondent to the telephone number clients will call. In this case we selected “Trunk_Infogroup – 5552038712”. This field is mandatory.
- ▶ **Service Level Threshold:** is the level of service we want to assign to the campaign. This means the time a client has to wait before the call is answered. For example, if we set the field in 30 seconds, all the calls answered after 30 seconds do not meet the threshold goal.
- ▶ **Ghost Call Threshold:** it’s the number of seconds the system allows to consider that a call is from an actual client and not from someone who called and hung up. For example, if I call mistakenly and hung up before 5 seconds elapsed, then the system will count my call as a ghost call. This is useful for the efficiency ratios, since it separates actual clients from the rest of the callers.
- ▶ **Short Call Threshold:** denotes the number of seconds of a call duration, for it to be considered “Short”.

- ▶ **Long Call Threshold:** denotes the number of seconds of a call duration, for it to be considered “Long”.
- ▶ **Custom Active Process:** if checked, this will enable an automatic process for call answering.
- ▶ **Custom Inactive Process:** is an automatic call answering process, in this case could be an IVR (Interactive Voice Response) process. For example, if the campaign is operational from 9 am to 6 pm; the Custom Inactive Process will be working from 6 pm to 9 am.
- ▶ **Uses Contact Center:** if checked, this option means that physical people will be tending to calls, using the VCC infrastructure.

In case the campaign uses the Contact Center, the administrator has to configure a set of options.

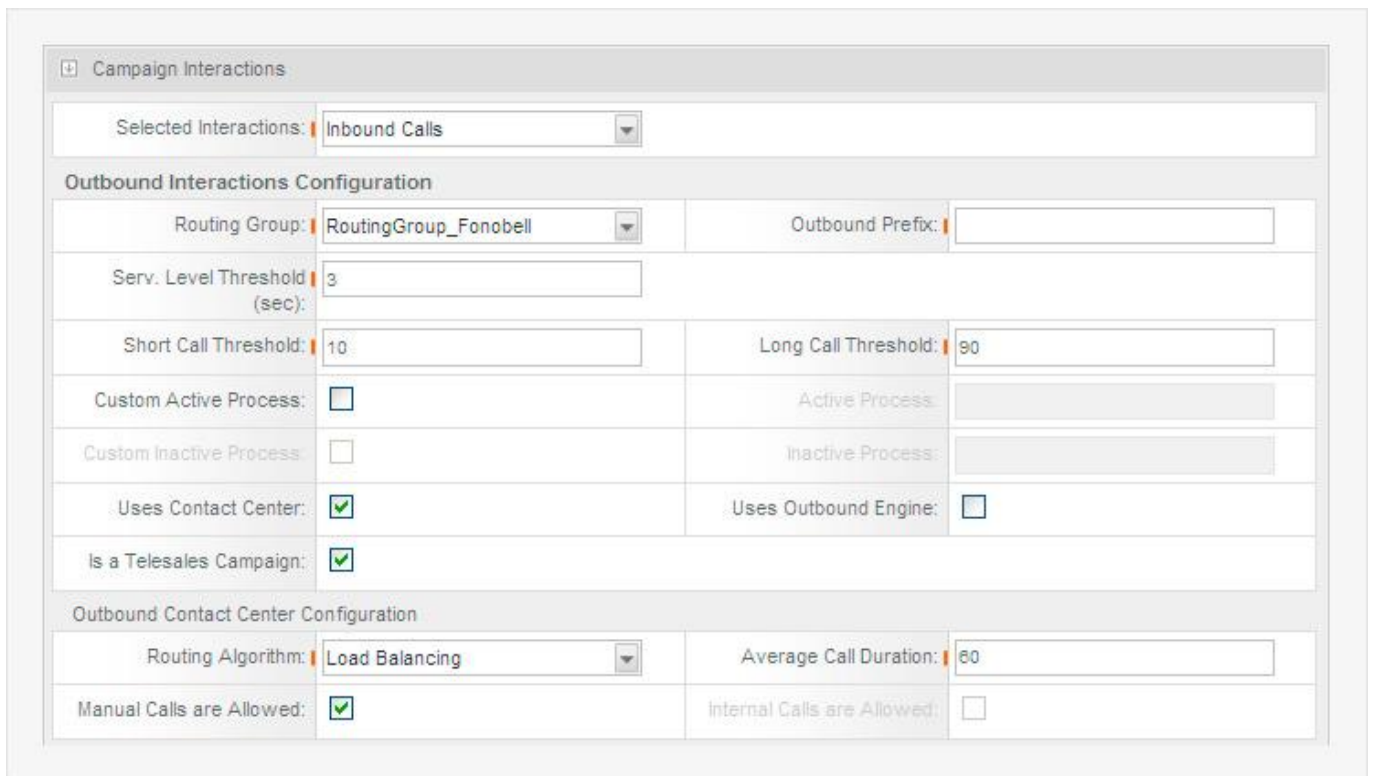
These fields are:

- ▶ **Routing Algorithm:** in this field, the administrator will choose a call allocation algorithm for the incoming calls. These algorithms are:
 - ▶ **Circular:** the system assigns a number to each agent, and allocates the calls evenly among the different agents. This scheme tends to balance the number of calls each agent receives.
 - ▶ **Load Balancing:** the system allocates the calls so that at the end of the day each agent receives an average number of calls. This scheme also tends to even out the number of calls each agent receives.
 - ▶ **Major Load:** the system assigns the new calls to those agents that have the highest number of calls answered. The fundament behind this is that those agents with a higher call flow are more efficient.
 - ▶ **Skill:** the system allocates the calls to those agents who have higher skill ratings necessary for each campaign
- ▶ **Average call duration:** is the average desired duration for each call.
- ▶ **Algorithm time limit:** indicates the number of seconds the system can use to allocate each call through a routing algorithm. It also represents the maximum time a client waits until an agent picks up the call.
- ▶ **Voicemail on timeout:** refers to an option given to the client of leaving a voicemail after the algorithm time limit has elapsed

- ▶ **Announce place in Queue:** announces the number on the waiting list to the caller after a queue.
- ▶ **Announce Wait time:** communicates the estimated waiting time before the call is answered to each caller.
- ▶ **Redial is Allowed:** if checked, the agents are able to call back the clients. This option is only available when the campaign also has an outbound interaction configured.

Outbound Campaigns

As is required for inbound campaigns, outbound campaigns need further configuration also.



Campaign Interactions			
Selected Interactions:	Inbound Calls		
Outbound Interactions Configuration			
Routing Group:	RoutingGroup_Fonobell	Outbound Prefix:	
Serv. Level Threshold (sec):	3		
Short Call Threshold:	10	Long Call Threshold:	90
Custom Active Process:	<input type="checkbox"/>	Active Process:	
Custom Inactive Process:	<input type="checkbox"/>	Inactive Process:	
Uses Contact Center:	<input checked="" type="checkbox"/>	Uses Outbound Engine:	<input type="checkbox"/>
Is a Telesales Campaign:	<input checked="" type="checkbox"/>		
Outbound Contact Center Configuration			
Routing Algorithm:	Load Balancing	Average Call Duration:	90
Manual Calls are Allowed:	<input checked="" type="checkbox"/>	Internal Calls are Allowed:	<input type="checkbox"/>

The fields that need configuration are:

- ▶ **Routing Group:** selects one of the configured routing groups to make the calls.
- ▶ **Outbound prefix:** indicates the prefix for all calls of each campaign. This prefix will be like a numeric label for the campaign that will separate it from other campaigns. It is a useful tool for billing purposes, since all the calls with the same prefix belong to the same campaign.
- ▶ **Service Level Threshold:** is the level of service we want to assign to the campaign. This means the time a client has to wait before the call is answered. For example, if we set the field in 30 seconds, all the calls answered after 30 seconds do not meet the threshold goal.
- ▶ **Short Call Threshold:** denotes the number of seconds of a call duration, for it to be considered “Short”.
- ▶ **Long Call threshold:** denotes the number of seconds of a call duration, for it to be considered “Long”.
- ▶ **Custom Active Process:** if checked, this will enable an automatic process for making calls
- ▶ **Uses contact center:** if checked, this option means that people will be tending to calls, using the VCC infrastructure.

- ▶ **Is a telesales Campaign:** if this is checked, the system will recognize that the campaign is for telemarketing and telesales, and will not call the numbers in the DNC (Do not call) lists. This is important for the different legal aspects of the campaigns, since in some countries it is illegal to call certain numbers for sales purposes.
- ▶ **Routing algorithm:** in this field, the administrator will choose a call allocation algorithm for the incoming calls. These algorithms are:
 - ▶ ***Circular:*** the system assigns a number to each agent, and allocates the calls evenly among the different agents. This scheme tends to balance the number of calls each agent receives.
 - ▶ ***Load Balancing:*** the system allocates the calls so that at the end of the day each agent receives an average number of calls. This scheme also tends to even out the number of calls each agent receives.
 - ▶ ***Major Load:*** the system assigns the new calls to those agents that have the highest number of calls answered. The fundament behind this is that those agents with a higher call flow are more efficient.
 - ▶ ***Skill:*** the system allocates the calls to those agents who have higher skill ratings
- ▶ **Average call duration:** indicates the number of seconds for call duration.
- ▶ **Manual calls are Allowed:** if this box is checked then the agents will be able to perform manual calls to phone numbers.

Chat Campaigns

If the administrator checks the CHAT box, then she needs to configure the different aspects of the chat interaction.

The screenshot shows a web interface for configuring chat interactions. At the top, there is a section titled "Campaign Interactions" with a sub-section "Selected Interactions:" containing a dropdown menu set to "Chat". Below this is the "Chat Interactions Configuration" section, which includes several rows of settings:

Chat Server:	CHAT	Chat Campaign Rule:	
Allow Chat Between Agents:	<input type="checkbox"/>		
Custom Active Process:	<input type="checkbox"/>	Active Process:	
Custom Inactive Process:	<input type="checkbox"/>	Inactive Process:	
Uses Contact Center:	<input checked="" type="checkbox"/>		

Below the "Chat Interactions Configuration" is the "Chat Contact Center Configuration" section, which includes a "Routing Algorithm:" dropdown menu set to "Circular".

- ▶ **Chat Server:** the administrator chooses one server to allocate the chat interactions
- ▶ **Chat Campaign Rule:** sets a rule for allocating the different interactions to the right campaign. For example, if we want to configure two chat campaigns for the same company, one for Support and another for Sales, the rule can be set as motive= "Support" , and motive= "Sales". This way, the different interactions can be classified by the motive for consultation. The filter will be applied if and only if the expression is TRUE, this means if the desired field coincides 100% with the rule.
- ▶ **Allow chat between agents:** if checked, this option allows chat interactions between the different agents in the campaign.
- ▶ **Custom Active process:** if checked, this will enable an automatic process for call answering.
- ▶ **Custom Inactive Process:** is an automatic call answering process, in this case could be BOT. For example, if the campaign is operational from 9 am to 6 pm; the Custom Inactive Process will be working from 6 pm to 9 am
- ▶ **Uses contact Center:** if checked, this option requires the presence of people for the interactions with the clients.
- ▶ **Routing Algorithm:** in this field, the administrator will choose a call allocation algorithm for the incoming calls. These algorithms are:

- ▶ ***Circular***: the system assigns a number to each agent, and allocates the calls evenly among the different agents. This scheme tends to balance the number of calls each agent receives.
- ▶ ***Load Balancing***: the system allocates the calls so that at the end of the day each agent receives an average number of calls. This scheme also tends to even out the number of calls each agent receives.
- ▶ ***Major Load***: the system assigns the new calls to those agents that have the highest number of calls answered. The fundament behind this is that those agents with a higher call flow are more efficient.
- ▶ ***Skill***: the system allocates the calls to those agents who have higher skill ratings

Mail campaigns

The screenshot shows a configuration window titled "Campaign Interactions". It contains several sections:

- Selected Interactions:** A dropdown menu set to "Mail".
- Mail Interactions Configuration:**
 - Campaign Email Address:** Text input field containing "feel_good@happinessconsultants.com".
 - Email Display Name:** Text input field containing "Hapinnes Consultants".
 - Mail Filter Expression:** Empty text input field.
 - Blind Carbon Copy:** Text input field containing "rdrecker@happinessconsultants.com".
 - Track Times on Reply:** Checked checkbox.
 - Custom Active Process:** Unchecked checkbox.
 - Active Process:** Empty text input field.
 - Custom Inactive Process:** Unchecked checkbox.
 - Inactive Process:** Empty text input field.
 - Custom ACK Process:** Unchecked checkbox.
 - ACK Process:** Empty text input field.
 - Uses Outbound Engine:** Unchecked checkbox.
 - Uses Contact Center:** Checked checkbox.
 - Serv. Level Threshold (min):** Text input field containing "5".
- Mail Engine Configuration:**
 - SMTP Server:** Dropdown menu set to "SMTP".
 - User:** Text input field containing "rdrecker".
 - Password:** Password input field with masked characters ".....".
- Mail Contact Center Configuration:**
 - Routing Algorithm:** Dropdown menu set to "Major Load".

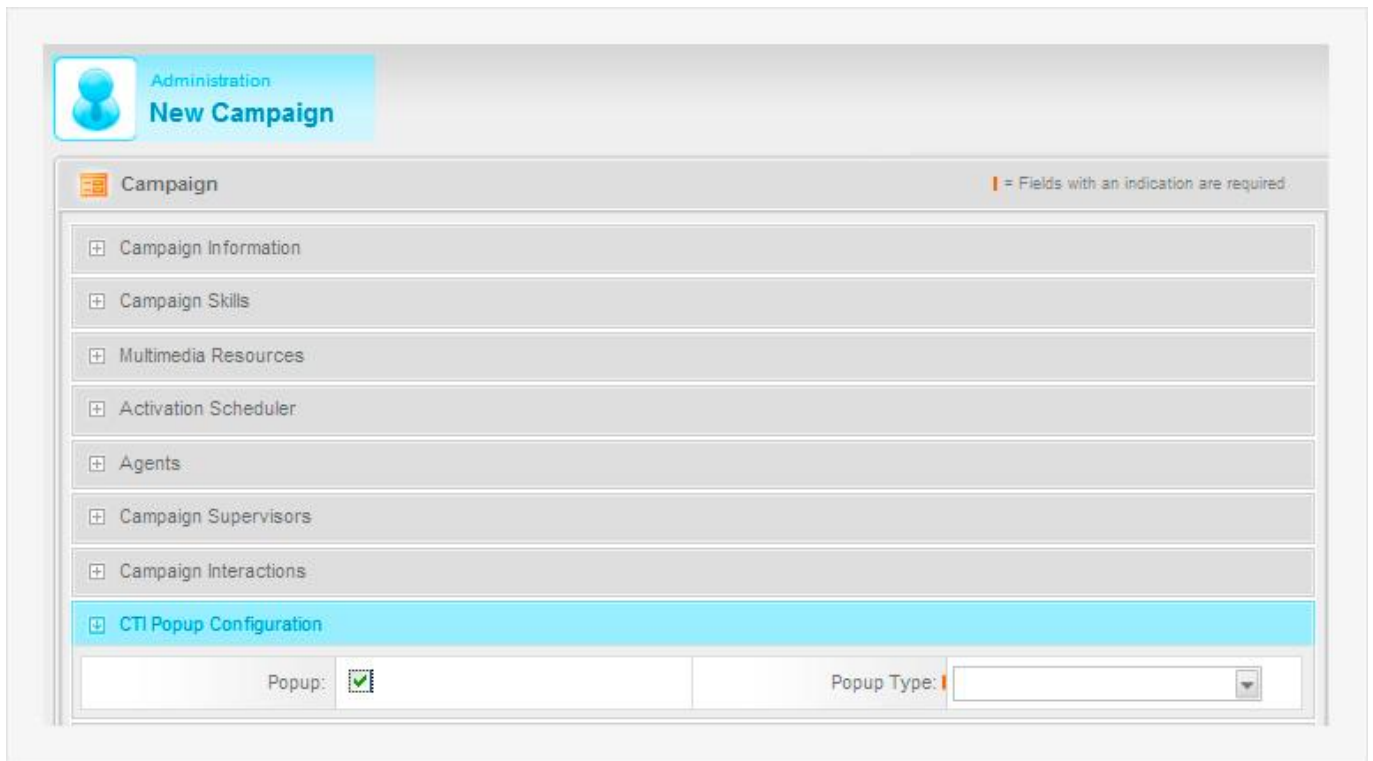
- ▶ **Campaign E-mail Address:** indicates the address that will receive all the emails from clients.
- ▶ **Email Display Name:** denotes the name that will appear as the sender of the E-mail. In this case, the name is “Happiness Consultants”.
- ▶ **Mail filter expression:** creates a filter for the incoming mails. The filter can act on the following email fields:
 - ▶ To
 - ▶ From
 - ▶ BCC
 - ▶ CC
 - ▶ Subject

For example, in this case we could filter all the messages with subject= “Help” to go to the support campaign.

- ▶ **Blind Carbon Copy:** sends a copy of all the emails of the campaign to the indicated address.
- ▶ **Custom Active process:** if checked, this will enable an automatic process for call answering.
- ▶ **Custom Inactive Process:** is an automatic call answering process, in this case could be a mail answering BOT. For example, if the campaign is operational from 9 am to 6 pm; the Custom Inactive Process will be working from 6 pm to 9 am
- ▶ **Custom ACK Process:** if enabled this option will allow the administrator to generate an automatic response email, with personalized contents, to let the clients know their e-mails have reached the VCC.
- ▶ **Uses outbound engine:** enables outbound calls together with the possibility of emailing customers.
- ▶ **Service level threshold (in minutes):** it's the number of minutes the system allows for an incoming email to be answered. In this case the value is 5 minutes, which means that for any given received email, the answer should be sent 5 minutes or less after the email was received.
- ▶ **SMTP Server:** indicates which of the SMTP servers available will be used for a particular campaign
- ▶ **User:** indicates the username of the handler of the account.
- ▶ **Password:** indicates the user's password to access de system.
- ▶ **Routing Algorithm:** in this field, the administrator will choose a call allocation algorithm for the incoming calls. These algorithms are:
 - ▶ **Circular:** the system assigns a number to each agent, and allocates the calls evenly among the different agents. This scheme tends to balance the number of calls each agent receives.
 - ▶ **Load Balancing:** the system allocates the calls so that at the end of the day each agent receives an average number of calls. This scheme also tends to even out the number of calls each agent receives.
 - ▶ **Major Load:** the system assigns the new calls to those agents that have the highest number of calls answered. The fundament behind this is that those agents with a higher call flow are more efficient.
 - ▶ **Skill:** the system allocates the calls to those agents who have higher skill ratings

CTI Popup Configuration

The Computer Telephony Integration (or CTI) enables the administrator to generate processes in the agent's computer when she starts a communication with a client.



The screenshot shows the 'New Campaign' configuration interface. The 'CTI Popup Configuration' section is expanded and highlighted in blue. It contains the following fields:

- Popup:** A checkbox that is checked.
- Popup Type:** A dropdown menu with a downward arrow.

A legend in the top right corner indicates that fields with an orange exclamation mark icon are required.

If the “Popup” checkbox is checked, this will enable a popup to appear in the agent's screen every time she engages in interaction with a client.

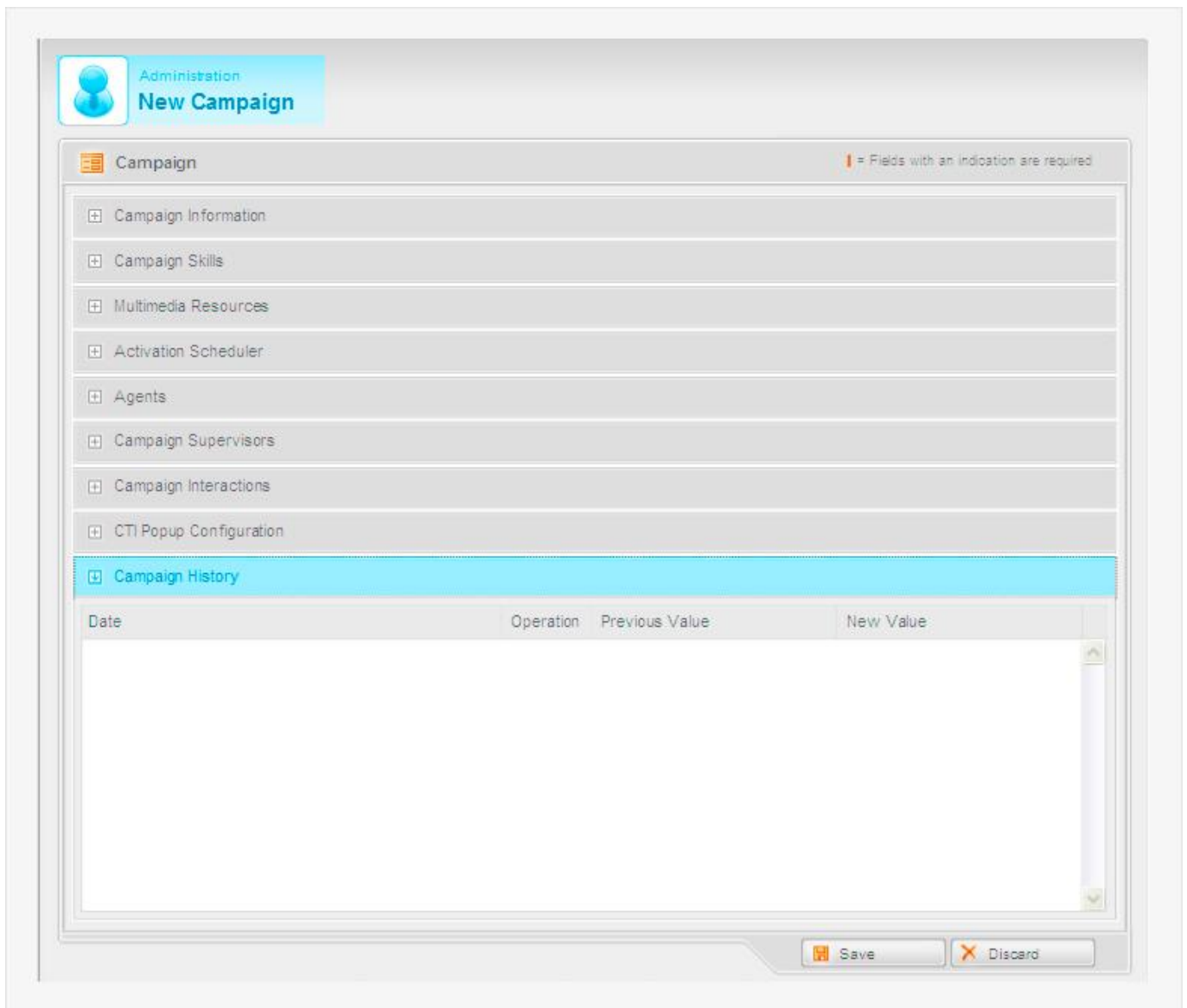
There are three types of interactions:

- ▶ ***ActiveX Control:*** Allows integration with COM/ActiveX components. Using this integration strategy you can develop your own components and integrate with almost anything.
- ▶ ***InConcert Scripting:*** opens a script on the agent's computer, so that the agent can follow it throughout the interaction with the client. The scripts opened with this application are scripts designed with the InConcert scripting application.
- ▶ ***Internet Explorer:*** allows the integration between the InConcert agent interface and a webpage.

For more information about integration processes, please see the Integration Manual.

Campaign History

In this screen the administrator will be able to see the changes introduced to the campaign.



The screenshot shows a web application interface for 'Administration' with a 'New Campaign' page. A sidebar on the left lists various campaign-related sections: Campaign Information, Campaign Skills, Multimedia Resources, Activation Scheduler, Agents, Campaign Supervisors, Campaign Interactions, CTI Popup Configuration, and Campaign History. The 'Campaign History' section is currently selected and highlighted in blue. Below this section, a table is visible with the following headers: Date, Operation, Previous Value, and New Value. The table body is currently empty. At the bottom right of the interface, there are two buttons: 'Save' and 'Discard'. A small note at the top right of the main content area states 'Fields with an indication are required'.

Each line will represent a different change.

The details shown in the screen are:

- ▶ Date
- ▶ Operation: changes performed
- ▶ Previous Value
- ▶ Present Value

Users Menu



The users menu is the second menu to the left, and provides the administrator with the necessary tools to create, edit and administrate the users of the campaign.

In the Users menu, there are three sub-menus

- ▶ All Users
- ▶ Agents
- ▶ Users by group.

We will proceed to detail the functionalities of all three of the sub menus.

All Users

The screenshot shows the Allegro Administration interface. The top navigation bar includes 'Administration', 'Outbound Engine', 'Reports', and 'Media Player'. The left sidebar contains various menu items, with 'Users' expanded to show 'All Users', 'Agents', and 'Users by Group'. The main content area displays the 'All Users' sub-menu, which includes a search filter, input fields for 'User Id' and 'Full Name', and a 'Group' dropdown. Below these fields is a table of users with the following data:

User Id	Full Name	Available	Login Status	Group
adinho	André Dinho	✓	Pause	Campaign Supervisor
admin	administrator	✓	Active	Operations Manager
afernandez	Alvaro Fernandez	✓	Active	Agent
Agent1	Santiago Hernandez	✓	Log Out	Agent
Agent10	Agent10	✓	Log Out	Agent
Agent100	Agent100	✓	Log Out	Agent
Agent101	Agent101	✓	Log Out	Agent

At the bottom of the table, there is a 'New User' button. The page number 'Page 1 of 23' and a 'Go to Page' field are also visible.

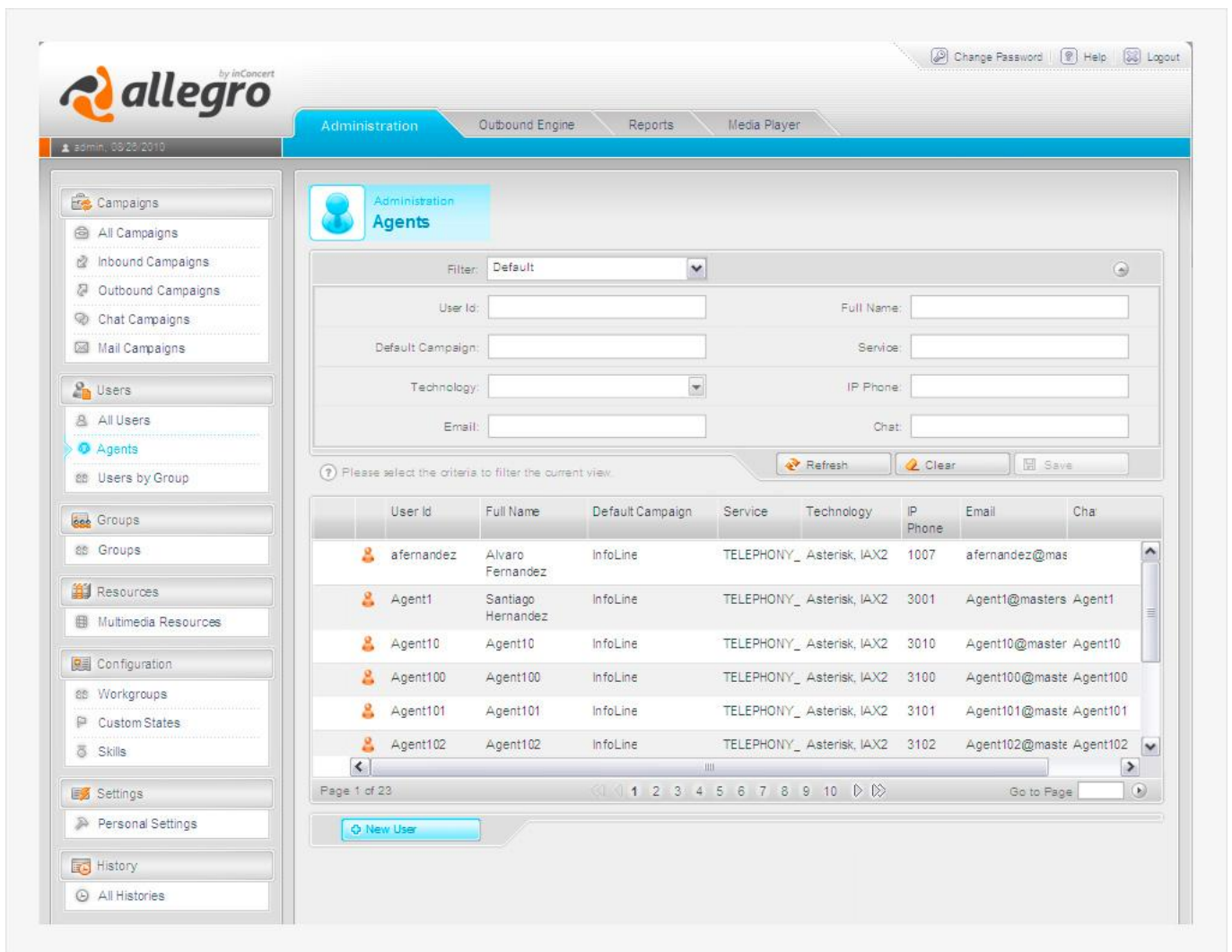
The “All Users” screen shows a list of all the users created for the VCC that will be available for the administrator to assign to different campaigns.

In this screen, the administrator visualizes the list of users, and can also edit their information or delete them from the list.

If for example, the administrator needs to delete the supervisor Andre Dinho because he no longer works for the company, then he should delete him in this screen.

The same goes for the edition of information.

Agents



The screenshot shows the Allegro Administration interface. The top navigation bar includes "Administration", "Outbound Engine", "Reports", and "Media Player". The left sidebar contains various menu items such as "Campaigns", "Users", "Groups", "Resources", "Configuration", "Settings", and "History". The main content area is titled "Administration Agents" and features a search form with the following fields: Filter (Default), User Id, Full Name, Default Campaign, Service, Technology, IP Phone, and Email. Below the search form is a table with the following columns: User Id, Full Name, Default Campaign, Service, Technology, IP Phone, Email, and Cha. The table contains the following data:

User Id	Full Name	Default Campaign	Service	Technology	IP Phone	Email	Cha
afernandez	Alvaro Fernandez	InfoLine	TELEPHONY_ Asterisk, IAX2	1007	afernandez@mas		
Agent1	Santiago Hernandez	InfoLine	TELEPHONY_ Asterisk, IAX2	3001	Agent1@masters	Agent1	
Agent10	Agent10	InfoLine	TELEPHONY_ Asterisk, IAX2	3010	Agent10@master	Agent10	
Agent100	Agent100	InfoLine	TELEPHONY_ Asterisk, IAX2	3100	Agent100@maste	Agent100	
Agent101	Agent101	InfoLine	TELEPHONY_ Asterisk, IAX2	3101	Agent101@maste	Agent101	
Agent102	Agent102	InfoLine	TELEPHONY_ Asterisk, IAX2	3102	Agent102@maste	Agent102	

In the “Agents” screen the administrator can visualize a list of all the agents that can operate in this VCC.

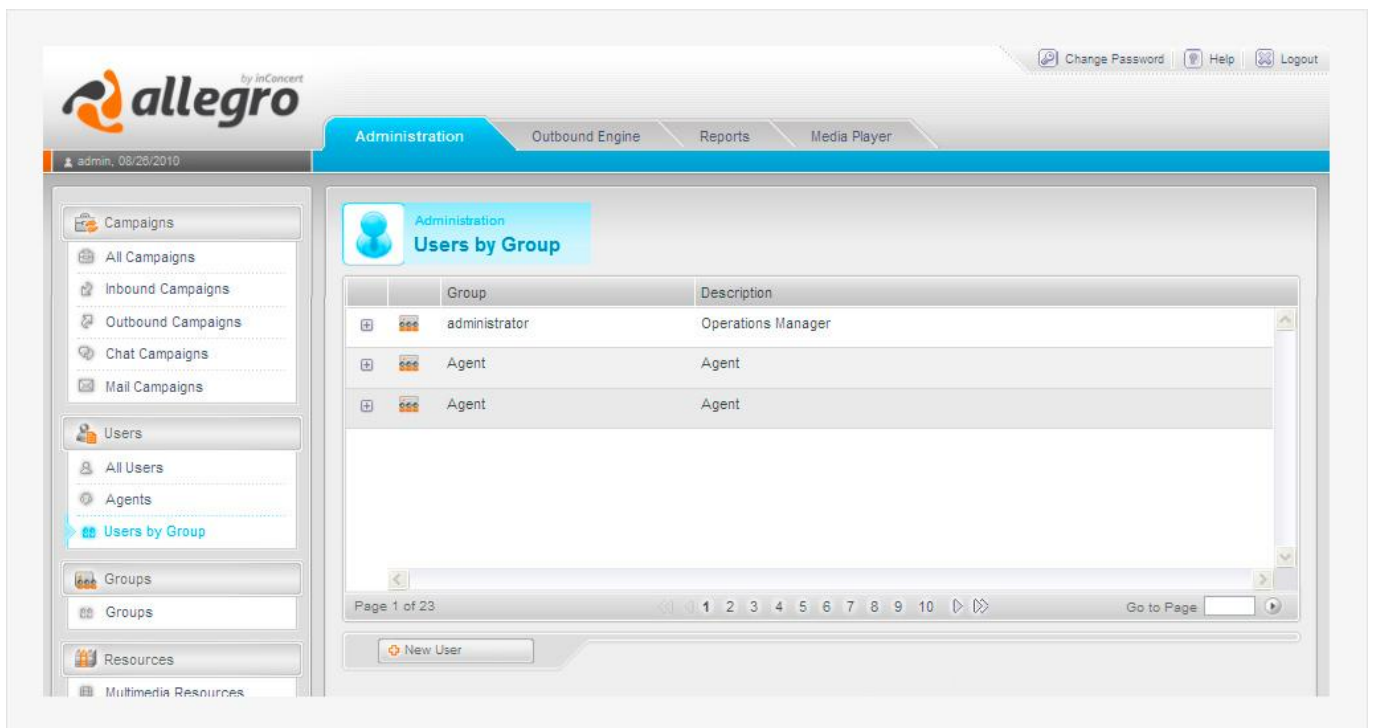
The search engine for the agents has more fields than the regular search engine; this is because each agent has many associated characteristics.

The search fields for an agent are:

- ▶ **User Id:** is the name with which the agent logs in to the VCC. Each user ID has to be unique.
- ▶ **Full Name:** the agent's full name
- ▶ **Default campaign:** if the VCC operates with more than one campaign, some agents are assigned to campaign A or campaign B as their default campaign. The default campaign is also the one that will appear first in the agent's taskbar.
- ▶ **Service:** refers to the telephony service used by the agent.
- ▶ **Technology:** refers to the kind of technology used by the agent's phone.
- ▶ **IP Phone:** identifies each agent by the assigned IP phone
- ▶ **Email:** identifies the agents by their assigned emails
- ▶ **Chat:** identifies the agents by their chat username.

This search fields allow the administrator to optimize his/her time by using the aforementioned parameters to identify agents.

Users by Group



In this screen the administrator can visualize the different users by the group they belong to. These groups can be:

- ▶ Agents

- ▶ Administrators
- ▶ Supervisors
- ▶ Application Designer
- ▶ Chief operating Officer
- ▶ Quality auditor

These categories are assigned to each user at the moment of creation of the users.

For more information on Groups, please see page 43 of this document.

Now that we've seen the different ways an administrator can visualize the different users of the VCC, we'll see how the administrator can create new users.

Creating new Users

To create new users, the administrator has to click on the “New User” button, placed below the list in all the screens of the “Users” menu.

The “New user” screen has 3 tabs, with their respective fields of information that need filling. These tabs are:

- ▶ User information
- ▶ Permissions
- ▶ User history

User information

The screenshot shows the 'New User' form in the Administration menu. The form is titled 'User' and contains several input fields for user information. The 'User Information' tab is active, showing fields for User ID, Full Name, Password, Confirm Password, State, Group, Time Zone, Language, and Country. A 'Show Permissions' checkbox is checked. The form also includes 'Permissions' and 'User History' tabs. A legend indicates that fields with an orange bar are required. At the bottom, there are 'Save' and 'Discard' buttons.

The fields in this screen will provide the information that will identify the user.

- ▶ **User ID:** the username with which the user will login to the system
- ▶ **Full name:** complete name of the user
- ▶ **Password:** password for logging in to the system. Case sensitive
- ▶ **Confirm password:** same as the previous field
- ▶ **State:** can be either “Disabled” or “Enabled”. If we choose “Disabled” the user will not be able to login to the system.

- ▶ **Group:** the administrator needs to choose to which group of users the new user will belong. The groups are (as mentioned before)
 - ▶ Agents
 - ▶ Administrators
 - ▶ Supervisors
 - ▶ Application Designer
 - ▶ Chief operating Officer
 - ▶ Quality auditor

- ▶ **Time Zone:** the administrator needs to indicate in which time zone the user will be working, in order to schedule work hours for the different campaigns. The time zone will also affect the time in which the information appears onscreen.
- ▶ **Language:** indicates in which language the InConcert interface will appear in the user's computer. It can be: English, Spanish, Portuguese and French
- ▶ **Country:** denotes in which country the user will be working.

All fields are mandatory, except for "Country".

Below there's an example of the creation of an "Agent" with all the information necessary. As can be seen in the image, we've assigned a username, complete name and password to the agent.

Administration

New User

User
! = Fields with an indication are required

User Information

User Id: <input type="text" value="SCompton"/>	Full Name: <input type="text" value="Sookie Compton"/>
Password: <input type="password" value="••••"/>	Confirm Password: <input type="password" value="••••"/>
State: <input type="text" value="Enabled"/>	Group: <input type="text" value="Agent"/>
Time Zone: <input type="text" value="(UTC-06:00) U.S. Central Stand"/>	Language: <input type="text" value="English"/>
Country: <input type="text" value="United States"/>	Show Permissions: <input checked="" type="checkbox"/>

Agent

Default Campaign: <input type="text" value="General info line"/>	Workgroup: <input type="text"/>
Phone: <input type="text" value="TELEPHONY_192_168_20_89_1024_ASTERISK_IAX2"/>	
Email: <input type="text"/>	Chat Alias: <input type="text"/>

Agent Skills

Name	Enabled	Description	Skill Value
English	<input checked="" type="checkbox"/>	English speaking	8
French	<input type="checkbox"/>	French speaking	5
German	<input checked="" type="checkbox"/>	German language abilities	3
Marketing	<input checked="" type="checkbox"/>	Marketing habilities	5
Spanish	<input type="checkbox"/>	Spanish speaking	5
Technology	<input checked="" type="checkbox"/>	Technology knowledges	7

Agent Campaigns

Name	Enabled	Description	Valid From	Valid Until
InfoLine	<input checked="" type="checkbox"/>	General info line	1973-01-01 00:00:00.000	2020-01-01 00:00:00.000
SellingType	<input type="checkbox"/>	Special selling to asia	1973-01-01 00:00:00.000	2020-01-01 00:00:00.000
SpecialPromo	<input type="checkbox"/>	Vip Promos	1973-01-01 00:00:00.000	2020-01-01 00:00:00.000
Support	<input checked="" type="checkbox"/>	Main support	1973-01-01 00:00:00.000	2020-01-01 00:00:00.000

Permissions

User History

Sookie Compton is an agent located in New Orleans, and therefore was assigned to the “Agent” group, and with the U.S. Standard Central Time (-6) time zone.

Her default campaign is “General InfoLine”, but she also participates in the “Main Support.” campaign; and his workgroup is “Top Seller Guys”. We’ve assigned an IP Phone number for Sookie, as well as an e-mail account and a chat alias.

We’ve also assigned value to his skills, giving her an 8 in English and a 7 in Technology. Note that the other skills are not checked, since they are not necessary to carry out the campaigns in which Ray was assigned.

Once all this info is input into the system, we click on the “Save” button to save our changes and generate the user.

We also need to set the User Permissions for Sookie.

To create a supervisor all the fields are the same, except those that concern the different campaigns and the skill allocation.

Administration
New User

User

Fields with an indication are required

User Information

User Id:	LReynolds	Full Name:	Lafayette Reynolds
Password:	****	Confirm Password:	****
State:	Enabled	Group:	Campaign Supervisor
Time Zone:	(UTC-06:00) U.S. Central Stand	Language:	English
Country:	United States	Show Permissions:	<input checked="" type="checkbox"/>

Supervisor Campaigns

Name	Enabled	Description	Workgroups
InfoLine	<input checked="" type="checkbox"/>	General info line	
SellingType	<input type="checkbox"/>	Special selling to asia	
SpecialPromo	<input type="checkbox"/>	Vip Promos	
Support	<input type="checkbox"/>	Main support	

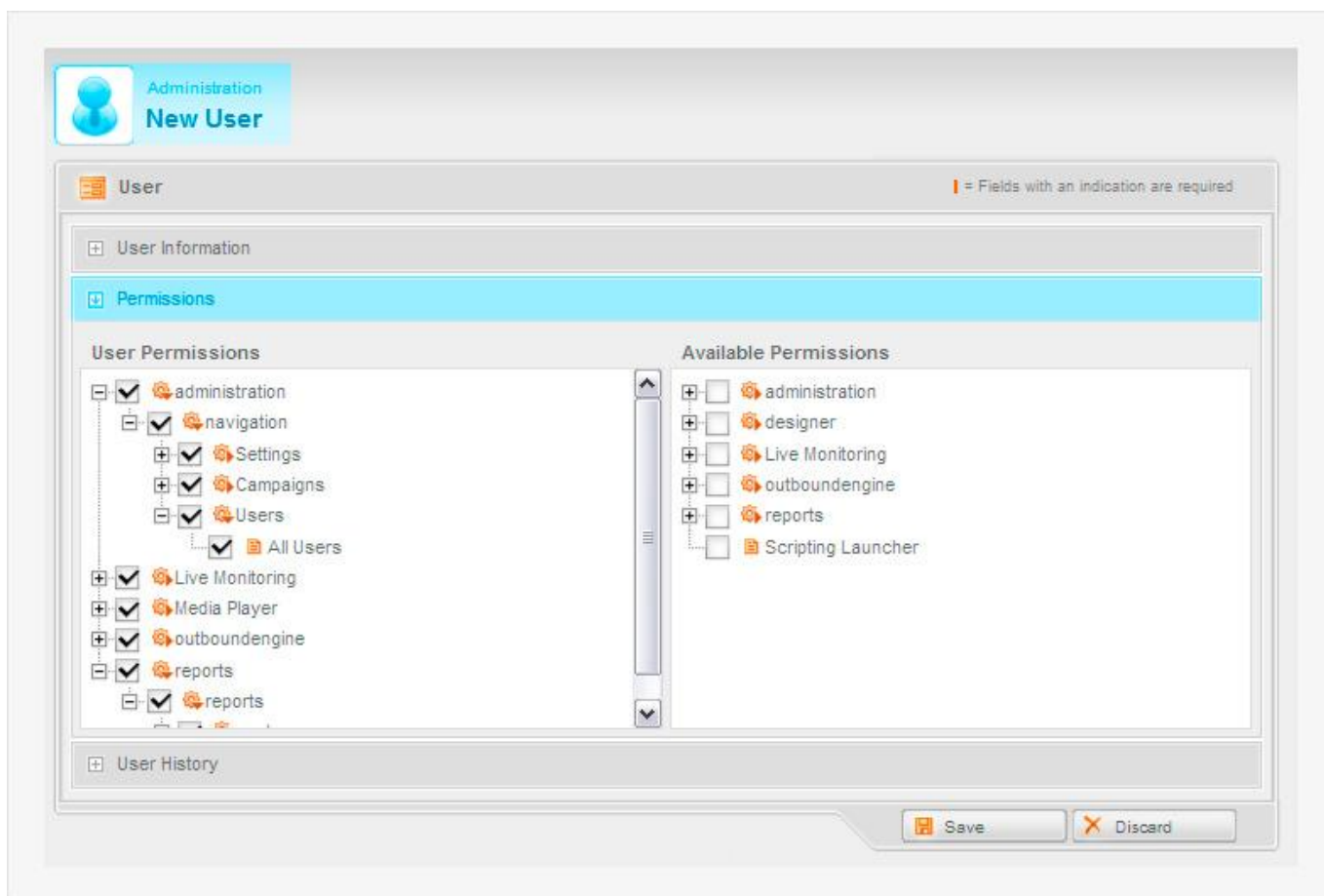
Permissions

User History

In this case we’ve created a campaign supervisor. Mr. Lafayette Reynolds will be supervising the InfoLine campaign. Since there are no workgroups created for any campaign, we did not assign

any workgroup to Lafayette. However, the assignation of workgroups to supervisors comes in handy by saving time and costs. More information about workgroups can be found in page 50.

User Permissions



In this screen the administrator will assign each user the permission she will require to work properly.

In this case, for the example of Ray Drecker, we've assigned him only a set of permissions that comes assigned by default for all agents.

If we had wanted him to only receive calls for example, we would have unchecked the "Outbound Engine" box.


In this view we can see the assigned permissions to the left of the screen, and the available permissions to the right.

To choose a permission, just check it's box and it will automatically move to the "assigned permissions" list.

To find a particular element in the tree, just open the branches by clicking in the '+' sign to the left of each branch.

User History

In this screen the administrator will see a list of all the changes included in the user's profile. In this case we'll see only a couple of changes.



The screenshot displays a web-based administration interface for a 'New User'. The interface is organized into several sections:

- Header:** 'Administration' with a user icon and 'New User' in large orange text.
- Section Header:** 'User' with a sub-header indicating that fields with an asterisk are required.
- Navigation:** Three expandable sections: 'User Information', 'Permissions', and 'User History'. The 'User History' section is currently expanded.
- User History Table:** A table with the following columns: 'Date', 'Operation', 'Previous Value', and 'New Value'. The table is currently empty.
- Footer:** Two buttons: 'Save' and 'Discard'.

Groups Menu



The groups menu allows the administrator to create groups and manage existing ones.

A group in this context is a cluster of users that perform similar tasks and have similar characteristics (such as permissions, licenses, etc). The utility of creating a group becomes evident for managing

purposes.

To create a new group, click on the “New Group” button below the list of already created groups.

The screenshot shows the Allegro Administration interface. The top navigation bar includes 'Administration', 'Outbound Engine', 'Reports', and 'Media Player'. The left sidebar contains a tree view with categories like Campaigns, Users, Groups, Resources, Configuration, Workgroups, and Custom States. The main content area is titled 'Administration Groups' and features a filter dropdown set to 'Default', input fields for 'Name' and 'Description', and buttons for 'Refresh', 'Clear', and 'Save'. Below this is a table with columns 'Name' and 'Description'. The table contains one entry: 'Designers' with the description 'people with designig permissions'. At the bottom of the main content area, there is a 'New Group' button.

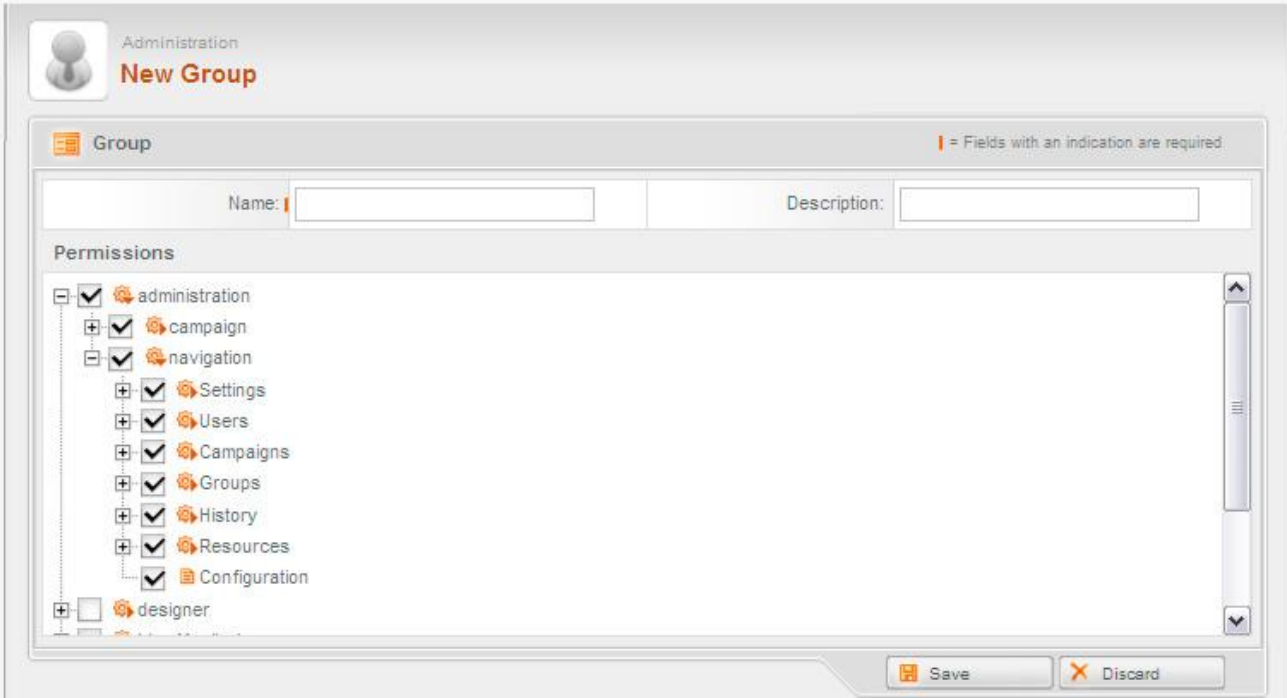
Name	Description
Designers	people with designig permissions

Creating a new group

Groups are defined by the user permissions of its members. In this case, we will create a group of users with designing permissions.

In this case, since we want to create a group of user with Designing Permissions, we uncheck all the boxes in the other permissions. See illustration on the next page.

Thus we have created the group “Designers” that assembles all the users with designing permissions.



The screenshot displays the 'New Group' configuration window in an administration tool. At the top, there is a header with a user icon and the text 'Administration' and 'New Group'. Below this is a 'Group' section with two input fields: 'Name:' and 'Description:'. A note indicates that fields with an asterisk are required. The main area is titled 'Permissions' and contains a tree view of system components. Each component has a checkbox and a gear icon. The 'designer' component at the bottom is selected, while all other components (administration, campaign, navigation, Settings, Users, Campaigns, Groups, History, Resources, Configuration) have their checkboxes checked. At the bottom right, there are 'Save' and 'Discard' buttons.

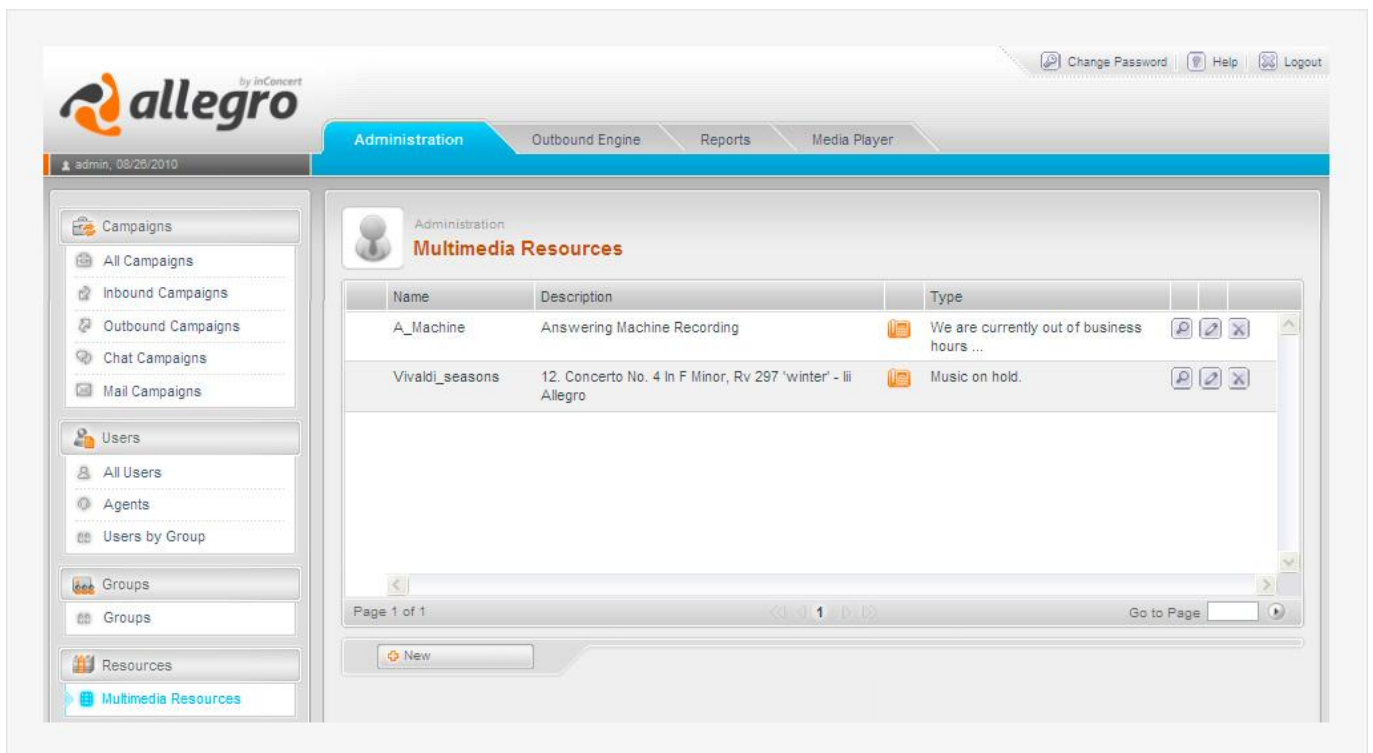
Resources Menu



In the “Resources” menu the administrator will find the “Multimedia Resources” tab that will allow her to allocate multimedia files for the workings of each campaign.

Multimedia Resources

The “Multimedia Resources” tab shows a screen with a list of all the audio files available for the different campaigns the VCC will carry out.

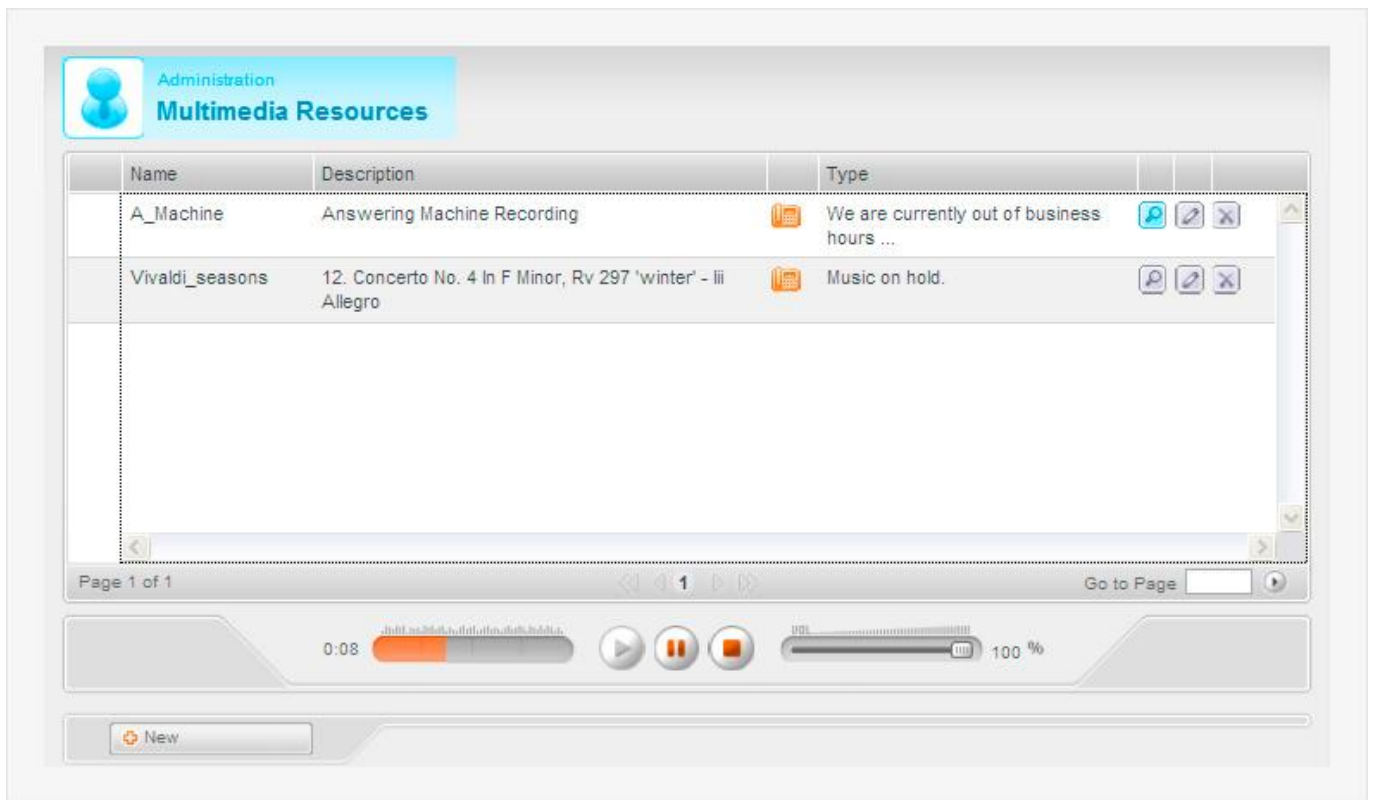
A screenshot of the Allegro Administration web interface. The top left shows the 'allegro by inConcert' logo and the user 'admin, 08/26/2010'. The top navigation bar includes 'Administration', 'Outbound Engine', 'Reports', and 'Media Player'. The left sidebar has a tree view with categories: Campaigns (All Campaigns, Inbound Campaigns, Outbound Campaigns, Chat Campaigns, Mail Campaigns), Users (All Users, Agents, Users by Group), Groups (Groups), and Resources (Multimedia Resources). The main content area is titled 'Administration Multimedia Resources' and contains a table with two rows of data. Below the table is a pagination control showing 'Page 1 of 1' and a 'Go to Page' field. A 'New' button is located at the bottom left of the main content area.

Name	Description	Type			
A_Machine	Answering Machine Recording	We are currently out of business hours ...			
Vivaldi_seasons	12. Concerto No. 4 In F Minor, Rv 297 'winter' - III Allegro	Music on hold.			

The list is in this case almost empty, with only one element.

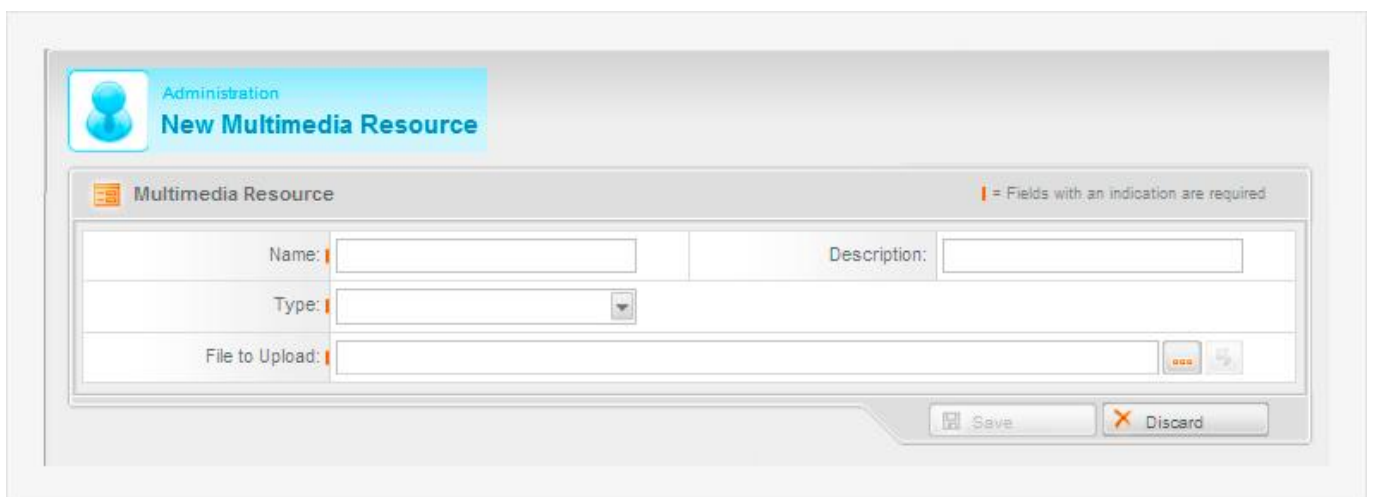
To the right of each line, there are three buttons. The classic “Edit” and “Delete” buttons, and the “Detail” button, that provides a preview of each element.

In this case, the detail button opens a media player below the list, giving the administrator the possibility to listen to each file.



If the administrator needs more files than those available, the system offers the option of uploading a new file, by clicking on the “New” button.

The “New File” screen has several fields that need filling in order to properly upload the files.

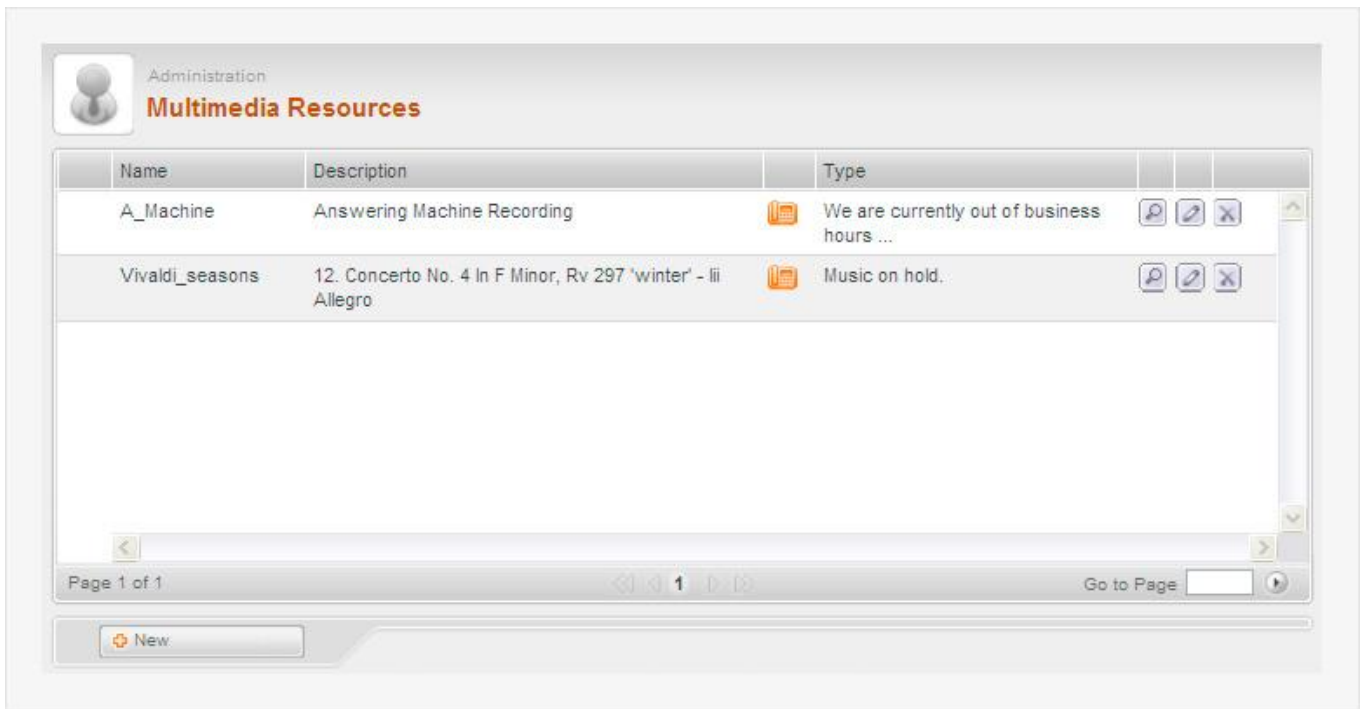


The fields that need to be filled are:

- ▶ **Name:** the name that will identify the file
- ▶ **Description:** brief description of the file
- ▶ **Type:** selects from an assortment of types that include:
 - ▶ Music on hold

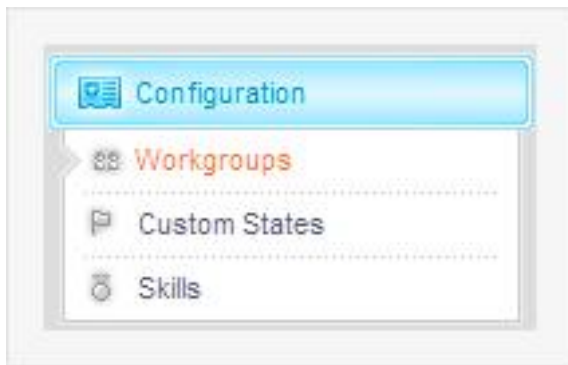
- ▶ Please wait
 - ▶ Thanks for calling, goodbye
 - ▶ This is an interactive voice response audio
 - ▶ We are currently out of business hours...
 - ▶ We are currently out of business hours please leave your message
 - ▶ We are sorry, we cannot process your call right now
 - ▶ We must reschedule your call
 - ▶ Welcome to...
 - ▶ While you wait (play this music/message)
 - ▶ You are in the position (number)
 - ▶ You have (n) seconds to leave a message
 - ▶ You must wait (time) to be served
-
- ▶ **File to upload:** the name of the file the administrator wants to upload. This field has a “Browse” button, and an “Upload” button to the right of the textbox. Once the administrator chooses a file, she will proceed to click on the upload button.

After this process is completed, the administrator will then proceed to save the changes, which make the new file available for use in the several campaigns carried out by the VCC.



In the illustration above, we can appreciate how the list is populated with the different files the administrator uploads.

Configurations Menu



The configurations menu allows the administrator the creation, edition and management of different tools for the working of the VCC and its different campaigns.

The sub-menus in this section are:

- ▶ Workgroups
- ▶ Custom States
- ▶ Skills

Workgroups

The screenshot displays the Allegro Administration interface. The top navigation bar includes 'Administration', 'Outbound Engine', 'Reports', and 'Media Player'. The left sidebar contains a menu with categories like Campaigns, Users, Groups, Resources, Configuration, Workgroups, Custom States, and Skills. The main content area is titled 'Administration Workgroups' and features a filter dropdown set to 'Default', input fields for 'Name' and 'Description', and buttons for 'Refresh', 'Clear', and 'Save'. Below this is a table with three rows of workgroups:

	Name	Description		
	Experienced	Experienced users		
	German_Clients	Users who work with german clients		
	TopSeller	Top seller guys		

At the bottom of the table area, there is a 'Page 1 of 1' indicator, a 'Go to Page' field, and a 'New Workgroup' button.

Workgroups are clusters of agents that share similar characteristics. The administrator can, for example create a group with the “Top Selling” users, like shown above. This is important for auditing processes and report generation, since it eases the process of accessing and processing information about the different users.

Creating a new workgroup



The screenshot shows a web interface for creating a new workgroup. At the top left, there is a blue header with a person icon, the word 'Administration', and a large blue button labeled 'New Workgroup'. Below this is a grey panel titled 'Workgroup' with a legend: a red vertical bar followed by the text '= Fields with an indication are required'. The form contains two input fields: 'Name:' and 'Description:'. The 'Name:' field has a red vertical bar on its left side. At the bottom right of the form are two buttons: 'Save' (with a floppy disk icon) and 'Discard' (with an 'X' icon).

To create a new workgroup, the administrator needs only to click on the “New Workgroup” button on the bottom part of the workgroup screen.

The fields are only two:

- ▶ **Name:** denotes the name that will identify the workgroup. Once it is saved, this field cannot be edited. This field is mandatory.
- ▶ **Description:** brief account of the workgroup. For example “Users with highest average sales per day”.

Once created, the workgroup needs to be populated with the desired users. This can be achieved by editing and/or creating the agents, selecting the desired workgroup. Please see page 37 for more information.

Custom States

The screenshot displays the Allegro Administration interface. The top navigation bar includes 'Administration', 'Outbound Engine', 'Reports', and 'Media Player'. The left sidebar contains a tree view with categories: Campaigns (All Campaigns, Inbound Campaigns, Outbound Campaigns, Chat Campaigns, Mail Campaigns), Users (All Users, Agents, Users by Group), Groups (Groups), Resources (Multimedia Resources), and Configuration (Workgroups, Custom States, Skills). The main content area is titled 'Administration Custom States'. It features a filter dropdown set to 'Default', an 'Application Name' dropdown set to 'baragent', and a 'State' input field. Below these is a 'Description' input field. A message reads 'Please select the criteria to filter the current view.' with 'Refresh', 'Clear', and 'Save' buttons. A table lists custom states for 'baragent':

Application Name	State	Description		
baragent	Coffee	Cofee time		
baragent	Lunch	Agent is out for lunch		
baragent	Out	Out for a while		
baragent	Smoking	Smoking time		

At the bottom, there is a 'Page 1 of 1' indicator, navigation arrows, and a 'Go to Page' field. A 'New Custom State' button is located at the bottom left of the main content area.

The different states allowed for the agents by default are:

- ▶ Online
- ▶ Pause
- ▶ Personal
- ▶ Toilette
- ▶ Training
- ▶ Break

The administrator can set up custom states to reflect other activities the agent can be doing. Custom states will show in the reports, and will allow better auditing processes.

Creating a new custom state



The screenshot shows a web interface for creating a new custom state. At the top left, there is a blue header with a person icon, the word "Administration", and the title "New Custom State". Below this is a form titled "Custom State". The form contains three input fields: "Application Name" (a dropdown menu with "baragent" selected), "State" (a text input field), and "Description" (a text input field). A legend in the top right corner of the form indicates that fields with an orange bar are required. The "Application Name" and "State" fields have orange bars, while the "Description" field does not. At the bottom right of the form, there are two buttons: "Save" and "Discard".

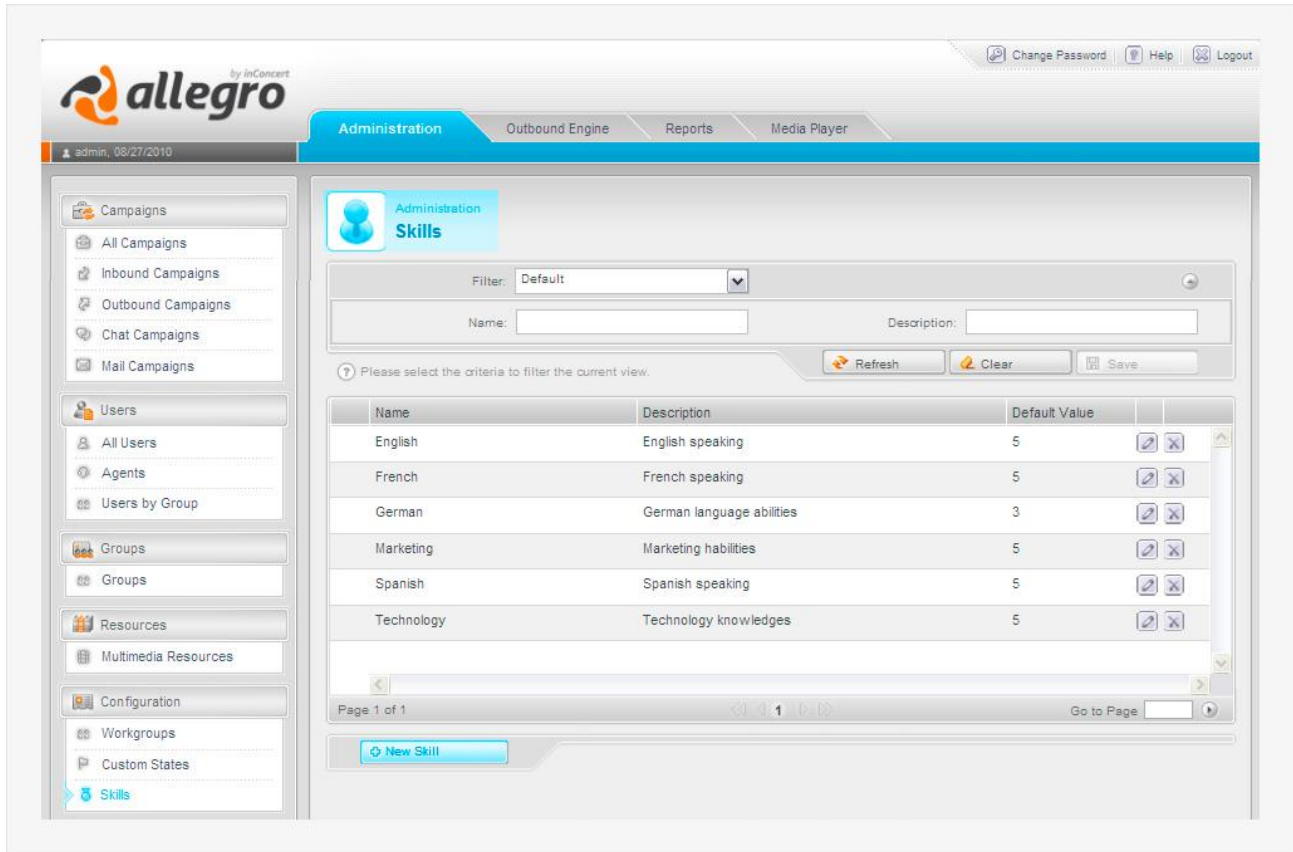
The new state needs to be configured for a specific application. In this case the application is “Baragent”. This means that the new state will appear in the agents’ bar.

The second field is “State”, which indicates what the agents will see in their bars as an available state. In this case, the nametag for the new state is “Lunch”.

The description is also important, as it explains the specific activity the agent will be doing once she sets the state as “Lunch” for example.

Skills

Skills are understood in this context as abilities that will help the agents do their jobs better. In this case, some campaigns may require a determinate level of specific skills.



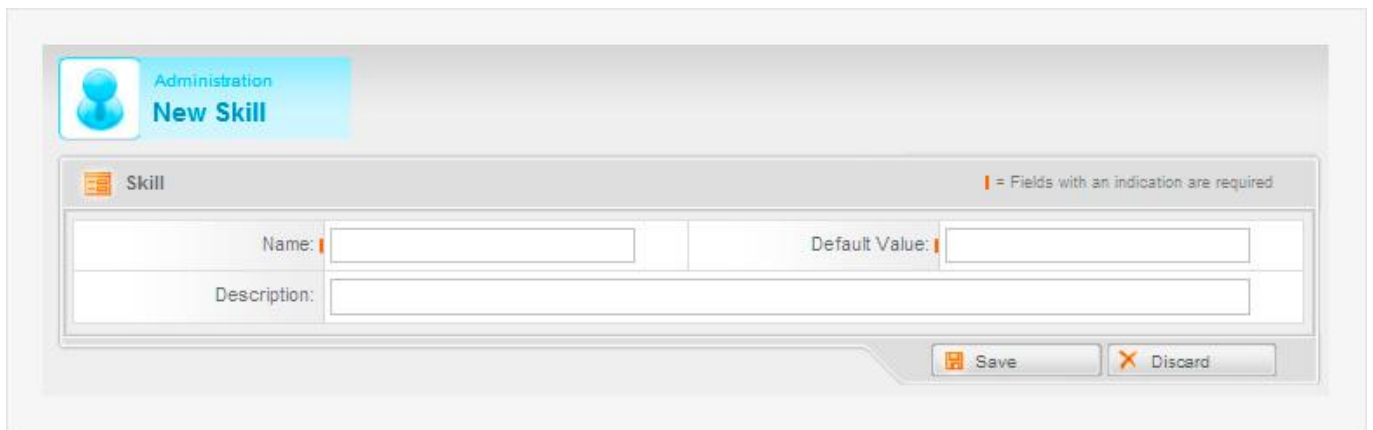
The screenshot shows the Allegro Administration interface. The top navigation bar includes 'Administration', 'Outbound Engine', 'Reports', and 'Media Player'. The left sidebar contains a tree view with categories: Campaigns (All Campaigns, Inbound Campaigns, Outbound Campaigns, Chat Campaigns, Mail Campaigns), Users (All Users, Agents, Users by Group), Groups (Groups), Resources (Multimedia Resources), and Configuration (Workgroups, Custom States, Skills). The main content area is titled 'Administration Skills'. It features a filter dropdown set to 'Default', input fields for 'Name' and 'Description', and buttons for 'Refresh', 'Clear', and 'Save'. Below this is a table of skills:

Name	Description	Default Value		
English	English speaking	5		
French	French speaking	5		
German	German language abilities	3		
Marketing	Marketing habilities	5		
Spanish	Spanish speaking	5		
Technology	Technology knowledges	5		

At the bottom of the table area, there is a 'Page 1 of 1' indicator and a 'Go to Page' field. A 'New Skill' button is positioned below the table.

In the “Skills” screen we’ll see a list of the available skills for use in the different campaigns. If there’s a need for a new skill, the administrator needs to click on the “New skill” button placed below the list.

Creating a new skill



The screenshot shows a web interface for creating a new skill. At the top left, there is a blue header with a person icon, the text "Administration", and "New Skill". Below this is a grey bar with a "Skill" tab and a legend: " = Fields with an indication are required". The form contains three input fields: "Name:" (with a red vertical bar on the left), "Default Value:" (with a red vertical bar on the left), and "Description:". At the bottom right, there are two buttons: "Save" (with a floppy disk icon) and "Discard" (with a red X icon).

The new skill will need a name, to identify it from other existing skills. This is a mandatory field, and will not be editable after the first save.

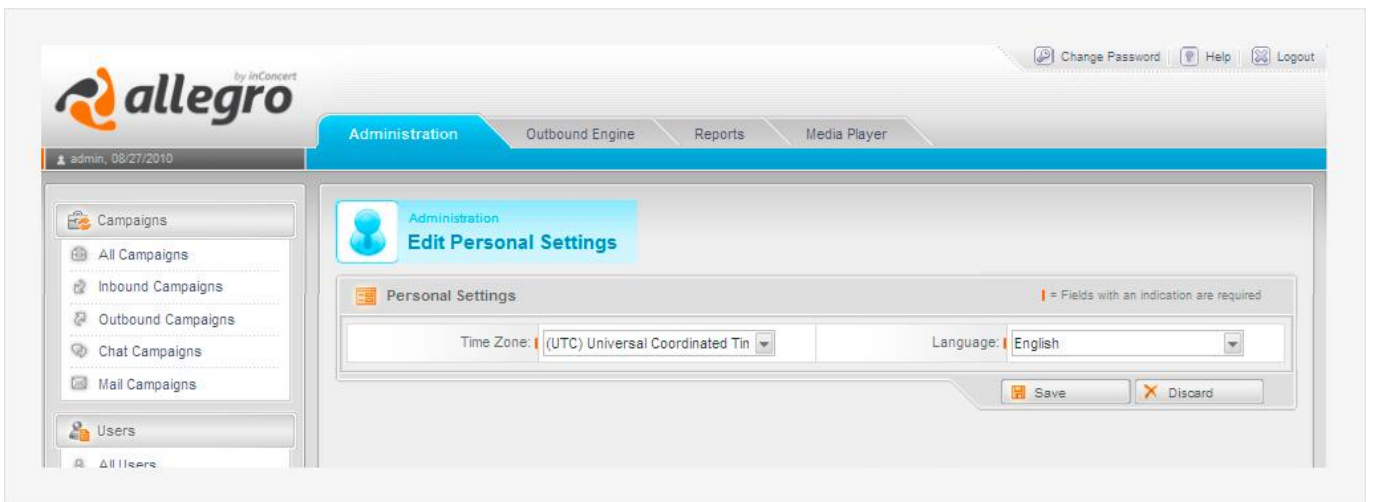
The “Default Value” is the value assigned to all users naturally. If the user has a higher or lower skill level, then the administrator needs to set it up in the users tab. See page 37 for new user creation.

The description field will contain a brief description of the skill.

Settings Menu



The settings menu has only one sub-menu, concerned with the personal settings of the interface for the administrator.



The options available for edition in the Personal Settings screen are:

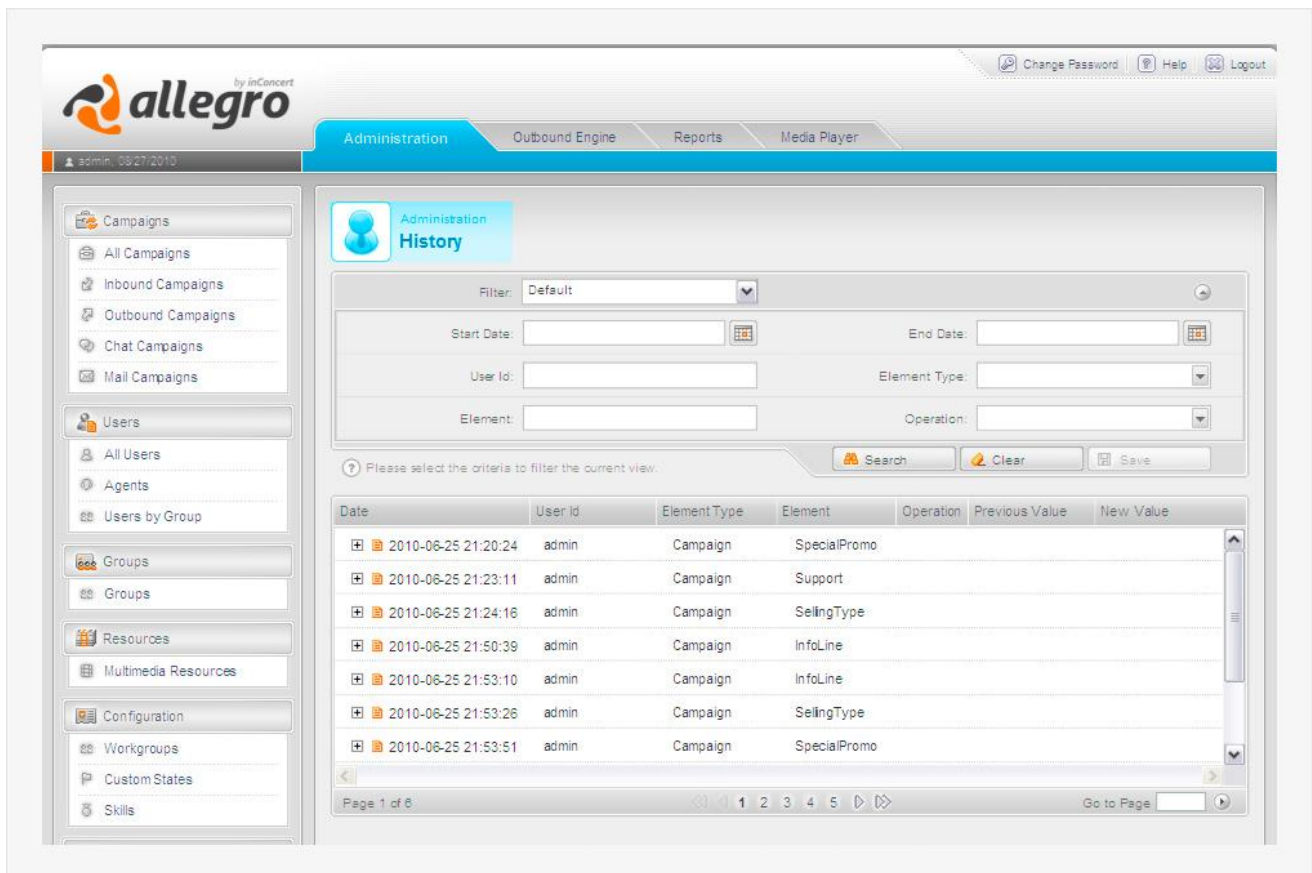
- ▶ **Time Zone:** the administrator can set the correct time zone for the area he's working in.
- ▶ **Language:** changes the language of the interface for this user. It can be: English, French, Spanish and Portuguese.

The changes will be effective once the administrator clicks on the “Save” button.

History Menu



In the “History” menu, the administrator can see the changes introduced to all the VCCs.



The screenshot shows the Allegro Administration interface. The left sidebar contains navigation options: Campaigns, Users, Groups, Resources, Configuration, Workgroups, Custom States, and Skills. The main content area is titled 'Administration History' and features a search filter section with fields for Start Date, End Date, User Id, Element Type, Element, and Operation. Below the search section is a table with the following data:

Date	User Id	Element Type	Element	Operation	Previous Value	New Value
2010-06-25 21:20:24	admin	Campaign	SpecialPromo			
2010-06-25 21:23:11	admin	Campaign	Support			
2010-06-25 21:24:16	admin	Campaign	SellingType			
2010-06-25 21:50:39	admin	Campaign	InfoLine			
2010-06-25 21:53:10	admin	Campaign	InfoLine			
2010-06-25 21:53:26	admin	Campaign	SellingType			
2010-06-25 21:53:51	admin	Campaign	SpecialPromo			

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In this case, the history shows the following data:

- ▶ **Date:** day and time in which the change was introduced
- ▶ **User ID:** who introduced the change
- ▶ **Element Type:** typology of what was changed
- ▶ **Element:** Name of what was changed
- ▶ **Operation:** which procedure was carried out
- ▶ **Previous Value:** state of the variable prior to the change
- ▶ **New Value:** state of the variable after the change was introduced

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