OfficeServ ACD — Supervisor User's Guide

#### COPYRIGHT

This manual is proprietary to SAMSUNG Electronics Co., Ltd. and is protected by copyright.

No part of this document may be copied, translated, transcribed or duplicated for any commercial purposes or disclosed to a third party in any form without the prior written consent of SAMSUNG Electronics Co., Ltd.

This manual should be read before the installation and operation, and the operator should correctly install and operate the product by using this manual.

This manual may be changed for the system improvement, standardization and other technical reasons without prior notice.

For further information on the updated manual or have a question for the content of manual, contact the address or homepage below.

Address: Document Center 2nd Floor IT Center. Dong-Suwon P.O. Box 105, 416, Maetan-3dong Yeongtong-gu, Suwon-si, Gyeonggi-do, Korea 442-600

Homepage: http://www.samsungdocs.com

© 2008 SAMSUNG Electronics Co., Ltd. All rights reserved.

# **CHAPTER 1. Introduction**

### Purpose

This document introduces the OfficeServ ACD — Supervisor application and describes how to operate the Supervisor application.

### **Document Content and Organization**

This document contains seven chapters and an abbreviation.

#### Chapter 2. Supervisor Application

This chapter introduces the Supervisor application.

#### Chapter 3. System Configuration

This chapter describes about System Configuration.

#### Chapter 4. ACD Configuration

This chapter describes about ACD configuration.

#### Chapter 5. Agent Configuration

This chapter describes about Agent Configuration.

#### Chapter 6. Call Routing

This chapter describes about Call Routing Configuration.

#### Chapter 7. Supervisor Control

This chapter describes in detail about the Supervisor roles.

#### Chapter 8. Live Monitoring

This chapter describes in detail about System Overview and Agent Monitoring.

### ABBREVIATION

This chapter describes the frequently used acronyms.

#### Conventions

The following special paragraphs are used to point out information that should be read. This information may be set-off from the surrounding text, but is always preceded by a bold title in capital letters.



#### **Console Screen Output**

- The lined box with 'Courier New' font will be used to distinguish between the main content and console output screen text.
- **Bold Courier New**' font will indicate the value entered by the operator on the console screen.

### References

### **Revision History**

Edition No.	Date of Issue	Remarks
00	Jun 2008	Base document version 1.0



This page is intentionally left blank.

# TABLE OF CONTENTS

CHAPTER 1. Introduction III		
Purpose Document Content and Organization Conventions Console Screen Output References Revision History	      .V  .V  V   V	
CHAPTER 2. Supervisor	13	
Starting the Supervisor	13	
CHAPTER 3. System Configuration	14	
Server Connections	14	
Accessing Server Connections	14	
Add	14	
Modify	14	
Delete	14	
Port Assignments	14	
Accessing Port Assignments	14	
Add	14	
Modify	14	
Delete	14	
Supervisor Accounts	14	
Accessing Supervisor Accounts	14	
Accounts	14	
Permissions	14	
Password	14	
System options	14	
Accessing System Options	14	
Call center	14	
Protection	14	
License Information	14	
Application Settings	14	

Completion Codes	
Accessing Completion Codes	14
Add Completion Code 1	14
Modify Completion Code 1	14
Delete Completion Code	14
Add Minor Code1	14
Modify Minor Code	14
Delete Minor Code	14

#### **CHAPTER 4. ACD Configuration**

### Division Definition......14 Accessing Group Definition ......14 Modify......14 IVR Assignments ...... 14 Accessing IVR Assignments ...... 14 Modify......14 Assign Completion Codes......14 Accessing Assign Completion Codes ......14

#### **CHAPTER 5. Agent Configuration**

4	

14

Agent Configuration14	ı
Accessing Agent Configuration14	ł
Add	ł
Modify14	ł
Delete	ł
Reset Password14	1
Phone-only Agent Configuration14	ł

14

Accessing Phone-only Agent Configuration14		
Add 14		
Modify14		
Delete		
ssign Agent Splits14	ŀ	
Accessing Assign Agent Splits 14		
By Agent		
By Split14		
Skill Levels		
Agent Permissions14		
Accessing Agent Permissions14		
Modifying Agent Permissions14		

#### CHAPTER 6. Call Routing

VR Routing Schedule14	
Accessing IVR Routing Schedule 14	
Set IVR Routing14	
Modify14	
Delete	
CLI/DID Routing14	
Accessing CLI/DID Routing	
Set Routing14	
Modify	
Delete	
Skill-Based Routing	
Accessing Skill-Based Routing14	
Set Skill-Based Routing	
Modify14	
Delete	

### CHAPTER 7. Supervisor Control

14

Messaging1	
Accessing & Sending Messages14	1
Callback List	
Accessing Callback List14	ļ
Assigning Callback List14	ł
Query on Callback List	1
Abandoned Call List	
Accessing Abandoned Call List14	ļ
Assigning Abandoned Call List14	ł

Query on Abandoned Call List	14
Completion Code History	
Accessing Completion Code History	14
Completion Code History Minor-Codewise	14
Completion Code History Agent-wise	14
Supervisor Work History	
Accessing Supervisor Work History	14
Query on Supervisor Work History	14

### CHAPTER 8. Live Monitoring

System Overview	. 14
Accessing System Overview	. 14
Agent Monitoring	1/
	. 14
	. 14
Monitoring Phone Only Agent	. 14
Monitoring Agent	. 14

#### ABBREVIATION

A	14
C	14
D	14
Ι	14
Н	14
Μ	14
0	14
P	14
R	14
S	14
Т	14
U	14
۷	14

14

14

# **CHAPTER 2.** Supervisor

This section describes the ACD Supervisor module which provides the web-based administration and operation of ACD.

# **Starting the Supervisor**

- **1.** Assumption: The installation steps are successfully finished.
- 2. Click Internet Explorer icon on the taskbar and enter the following URL in the address field http://(Domain name)/Supervisor/

#### OR

*3.* From the Windows desktop, click the Start then choose Programs » Samsung Electronics » OfficeServ ACD » Supervisor.

OR



- **4.** Click ACD Supervisor **Supervisor icon** on the desktop.
- 5. Press enter. The OfficeServ ACD Login page is displayed.
- *6.* Enter appropriate Username and Password.
- 7. Press **OK.** The **OfficeServ Supervisor Home Page** is displayed to access the Supervisor features.

#### NOTE LOGIN

Number of Supervisor login to ACD Supervisor is based on the Licence Type. Refer <u>License</u> <u>Information</u> page for details.





# **CHAPTER 3. System Configuration**

This section describes the features related to system configuration.

## **Server Connections**

The Server Connections allows the user to register the IVR Server.

### **Accessing Server Connections**

The below section describes how to access the Server Connections page.

**1.** Click **Server Connections** on the Supervisor left pane.

2. The Server Connections page with Server List is displayed.

OfficeServ ACD Superv	isor	🔯 10:14:59 AM	🕅 LOGOUT
Default Supervisor	📓 System Configuration > Server Connections		
System Configuration	Q Server List		
Server Connections     Port Assignments     Supervisor Accounts     System Options     Completion Codes     ACD Configuration     Division Definition     Group Definition     Split Definition     IVR Assignments	⊞- IVR Servers		
Assign Completion Codes     Agent Configuration     Agent Configuration     Phone-Only Agent     Configuration     Assign Agent Splits     Agent Permissions	Add IVR Server		
Call Routing ► IVR Routing Schedule ► CLI/DID Routing ► Skill-Based Routing	✓ Usable Save Delete Server Name: Server IP or DNS Name:		
Supervisor Control • Messaging • Callback List • Abandoned Call List • Completion Code History • Supervisor Work History Live Monitoring • System Overview • Agent Monitoring	Make sure to restart the ACD Server after modifying IVR Server information.		

*3.* The status of IVR Server indicates the following:

- Indicates that the IVR Server is not in use.
- 🥥 Indicates that the IVR Server is in use.

### Add

The [Add] option allows the user to add IVR Server.

- *1.* Follow the steps in <u>Accessing Server Connections</u> section.
- 2. The Add IVR Server section is displayed.

Add IVR Server			
✓ Usable	Save Delete		
Server Name:			
Server IP or DNS Name:			
Make sure to restart the ACD Server after modifying IVR Server information.			

*3.* Click **Usable** checkbox to indicate whether the IVR server is functional.

**4.** Enter the following information:

- Server Name
- Server IP or DNS name
- 5. Click **Save** to register the IVR Server. The ACD Server has to be restarted after modifying the IVR Server information.

### Modify

The [Edit] option allows the user to modify the selected IVR Server.

- 1. Follow the steps in <u>Accessing Server Connections</u> section.
- 2. Select a server by clicking on the server name.
- *3.* The Edit IVR Server section is displayed.

Edit IVR Server	
✓ Usable	Save Delete
Server Name:	SQLExpress
Server IP or DNS Name:	107.108.5.46
Make sure to restart the ACD information.	Server after modifying IVR Server

4. Enter the required changes.

5. Click **Save** to save the modified server information. The ACD Server has to be restarted after modifying the IVR Server information.

### Delete

The [Delete] option allows the user to delete the selected server information.

- 1. Follow the steps in <u>Accessing Server Connections</u> section.
- 2. Select a server by clicking on the server name.
- *3.* The Edit IVR Server section is displayed.
- 4. Click 'Delete' button, a message, "Are you sure to remove IVR Server?" is displayed.
- **5.** Click **OK** to delete the server.

### **Port Assignments**

The Port Assignments allows the user to register the ports for Gateways, Queues, Station, Central Office Trunks and RAD or IVR.

### **Accessing Port Assignments**

The below section describes how to access the Port Assignments page.

- **1.** Click **Port Assignments** on the Supervisor left pane.
- 2. The Port Assignments page with Port List is displayed.
- *3.* It shows different types of Port list:
  - ACD Gateway
  - ACD Queue Group
  - Agent Stations
  - Central Office Trunks
  - RAD/IVR Ports

OfficeServ ACD Supervi	sor	🞯 10:15:25 AM	🕅 LOGOUT
Default Supervisor	📓 System Configuration > Port Assignments		
System Configuration   System Connections  Port Assignments  Supervisor Accounts  Completion Codes  ACD Configuration  Coup Definition  Coup Definition  Coup Definition  Coup Definition  Suppletion Codes  Agent Configuration  Assign Completion Codes  Agent Configuration  Agent Permissions  Call Routing  Supervisor Control  Messaging  CallBack List  Abandoned Call List  Completion Code History  Supervisor Work History  Supervisor Work History  Agent Monitoring  Agent Monitoring  Agent Monitoring	ACD Gateway     ACD Queue     Gagent Stations     Central Office Trunks     RAD/IVR      Add Port      Port Type: ACD Gateway     Save Delete      Node ID: 1 Available: Yes W     Delete      Node ID: 1 Available: Yes W     O - 0      Make sure to restart the ACD Server after modifying Port Assignments.		

*4.* The status of Port indicates the following:

- Indicates that the port is not in use.
- **O** Indicates that the port is in use.

# Add

The [Add] option allows the user to add the Ports.

- *1.* Follow the steps in <u>Accessing Port Assignments</u> section.
- **2.** The Add Port is displayed.

🔍 Add Port				
Port Type: ACD Gateway 💌			Save	Delete
Node ID: 1	Available:	Yes	*	
Port #s (2nd box blank for single port):			0 -	0
-				
<ol> <li>Make sure to restart the ACD Server after modifying Port Assignments.</li> </ol>				

- *3.* Enter the following information:
  - Port Type
    - ACD Gateway Select this option to configure the port numbers where the call is switched to ACD Server.
    - ACD Queue Group Select this option to list port numbers or station group where queued call is waiting.
    - > Agent Station Select this option to list the agent extension.
    - Central Office Trunks Select this option to list the port numbers with routi ng rules.
    - > IVR Ports/RAD Ports Select this option to list the IVR/RAD Ports.
  - Node ID Select the switches from the dropdown list.



#### Node ID

Maximum of 8 nodes are available. The Node ID used here should co-incide with the configured switch number in the OfficeServ Link.

- Available Select this option to indicate whether to use the port or not.
- **Port number** Enter the Port Range.

#### Port Number

NOTE

If configuring for a single port then enter the port number in the first text box and the second text box to be zero. If configuring for port range then enter the minimum range in the first text box and the maximum range in the second text box.

Refer MMC Settings for more information.

• Routing Sequence — The three types of routing options are:



#### **Routing Sequence**

This option is available only if the user select Central Office Trunks in Port Type.



#### **RAD Routing Sequence**

RAD supports only CLI and DID routing options

Routing	Description
CLI	Caller Line Identification: Caller's number (Caller ID) is configured and mapped to the
	Split. Based on caller ID, incoming calls are routed to the corresponding target split;
	other wise calls are routed to the default split.
DID	Direct Inward Dialing: Caller dialed number is configured and mapped to the Split.
	Based on the dialed number, incoming calls are routed the corresponding target split
	other wise calls are routed to the default split.
IVR.	Incoming calls are redirected to the IVR, which plays a voice menu to get the desired
	service from the caller and then hands over the calls back to the ACD server with
	service input by the caller OR hands over the calls to specific agent device. The calls
	are then routed to the appropriate spilt supporting the service received from IVR. The
	call is routed to the default split in case caller does not input anything,
$CLI \rightarrow DID$	If caller's number is found in the CLI routing list, route the call to the target split.
	Otherwise, check the DID routing list. If DID number is found in the DID routing list,
	route the call to the target split. If neither CLI routing nor DID routing is available, route
	the call to the default split
$DID \rightarrow CLI$	If DID number is found in the DID routing list, route the call to the target split.
	Otherwise, check the CLI routing list. If CLI number is found in the CLI routing list, route
	the call to the target split. If neither DID routing nor CLI routing is available, route the
	call to the default split
$CLI \rightarrow IVR$	Apply the CLI routing. If CLI routing is not available, apply IVR routing.
$\text{DID} \rightarrow \text{IVR}$	Apply the DID routing. If DID routing is not available, apply IVR routing.
$CLI \to DID \to \ IVR$	Apply the CLI routing. If CLI is not available, apply DID routing. If DID routing is also not
	available, apply IVR routing.
$DID\toCLI\toIVR$	Apply the DID routing. If DID is not available, apply CLI routing. If CLI routing is also not
	available, apply IVR routing.

• Server — Select the available servers from the dropdown list.



**4.** Click **Save** to register the port. The ACD Server has to be restarted after modifying Port Assignments.

### Modify

- The [Edit] option allows the user to modify the selected Port Type.
- *1.* Follow the steps in <u>Accessing Port Assignments</u> section.
- 2. Select a port by clicking on the port name.

Edit Port			
Port Type: ACD Gateway		Save Delet	e
Node ID: 1	Available:	Yes 🗸	
Port #s (2nd box blank for single port):		3501 - 0	)
🕦 Make sure to restart the ACD Server af	ter modifying Por	t Assignments.	

- *3.* The Edit Port is displayed.
- **4.** Enter the required changes.
- 5. Click **Save** to save the modified port information. The ACD Server has to be restarted after modifying Port Assignments.

### Delete

The [Delete] option allows the user to delete the selected port information.

- 1. Follow the steps in <u>Accessing Port Assignments</u> section.
- *2.* Select a port by clicking on the port name.
- *3.* The Edit Port is displayed.
- 4. Click 'Delete' button, a message, "Are you sure to remove port?" is displayed.
- **5.** Click **OK** to delete the port.

### **Supervisor Accounts**

The Supervisor Accounts allows the user to configure login accounts for Supervisor, Reporting and Wallboard.

### **Accessing Supervisor Accounts**

The below section describes how to access the Supervisor Accounts page.

**1.** Click **Supervisor Accounts** on the Supervisor left pane.

*2.* The **Supervisor Accounts** page with **Supervisor List** is displayed.

- *3.* The status of Supervisor indicates the following:
  - Indicates that the Supervisor Account is not available.
  - <sup>(c)</sup> Indicates that the Supervisor Account is available.

OfficeServ ACD Supervi	sor	🕑 03:26:15 PM	🕅 LOGOUT
Default Supervisor	📓 System Configuration > Supervisor Accounts		
System Configuration	Accounts Permissions Password		
Server Connections	Supervisor List		
<ul> <li>Fort Assignments</li> <li>Esupervisor Accounts</li> </ul>			
<ul> <li>Supervisor Accounts</li> <li>System Ontions</li> </ul>	Call Center Manager Accounts		
<ul> <li>Completion Codes</li> </ul>	Wallboard Monitor Accounts		
ACD Configuration			
Division Definition			
▶ Group Definition			
▶ Split Definition			
► IVR Assignments			
Assign Completion Codes			
Agent Configuration			
► Agent Configuration			
Phone-Only Agent			
Configuration			
Assign Agent Splits			
Agent Permissions			
Call Routing	Add Supervisor		
► IVR Routing Schedule	Depart Department Cause Dela	to _	
► CLI/DID Routing	Usable Account Type: Manager Y Reset Password Save Dele	le	
<ul> <li>Skill-Based Routing</li> </ul>	Login ID: Name:		
Supervisor Control	Password: Confirm Password:		
► Messaging	Description:		
Callback List	Admin Level: Admin Level 1 🗸 Can Del: 🗌 Agents		
Abandoned Call List			
Completion Code History			
Supervisor Work History			
<			
Done	Second intra	anet 🔍	100% • 🤢

### Accounts

The [Accounts] option allows the user to configure the supervisor login accounts. The Supervisor and Reporting share the same login account. By default, "admin" account is created with Supervisor.

### **Add Supervisor**

- 1. Follow the steps in <u>Accessing Supervisor Accounts</u> section.
- 2. The Add Supervisor is displayed.

Add Supervisor	
Vusable Account Type: Manager 👻	Reset Password Save Delete
Login ID:	Name:
Password:	Confirm Password:
Description:	
Admin Level: Admin Level 1 💌	Can Del: 📃 Agents

- *3.* Enter the following information:
  - Click Usable checkbox to indicate whether the Supervisor is available or not.
  - Select **Account Type** option to indicate whether to add supervisor for Monitoring or as a Manager.
  - Login ID: Enter the Supervisor login ID.
  - Name: Enter the Supervisor Name.
  - **Password** —Enter the new password.
  - Confirm Password Enter the new password again.
  - **Description** Enter description about the supervisor.
  - Select the Admin Level option to indicate the permission for the supervisor.
  - Select Can Del option to indicate whether to allow the supervisor to delete agent.



If account type is Manager then Admin Level and Can Del option is enabled.

4. Click **Save** to register the supervisor details.

### Modify

The [Edit] option allows the user to modify the selected Supervisor details.

- *1.* Follow the steps in <u>Accessing Supervisor Accounts</u> section.
- 2. Select a Supervisor by clicking on the Supervisor name.
- **3.** The Edit Supervisor is displayed.

Edit Supervisor				
✓ Usable Account Type: Monitor ▼ Reset Password Save Delete				
Login ID: S1	Name: Supervisor			
Password:	Confirm Password:			
Description: Supervisor 1				
Admin Level: Admin Level 1 🗸	Can Del: 🗹 Agents			

### 4. Enter the required changes.

NOTE	ID Supervisor login ID cannot be modified.
	Supervisor login LD cannot be modified.

5. Click Save to save the modified Supervisor information.

#### Delete

The [Delete] option allows the user to delete the selected Supervisor details.

- 1. Follow the steps in <u>Accessing Supervisor Accounts</u> section.
- *2.* Select a Supervisor by clicking on the Supervisor name.
- *3.* The Edit Supervisor is displayed.
- 4. Click 'Delete' button, a message, "Are you sure to remove Supervisor?" is displayed.
- **5.** Click **OK** to delete the Supervisor.

#### **Reset Password**

The [Reset Password] option allows the supervisor to reset supervisor password.

- *1.* Follow the steps in <u>Accessing Supervisor Accounts</u> section.
- *2.* Select an agent by clicking on the supervisor name.
- *3.* The Edit Supervisor is displayed.
- 4. Click 'Reset Password' button, a message, "(Supervisor name) password will be reset to '4321'. Continue?'
- **5.** Click **OK** to change the password.

### Permissions

The [Permissions] tab allows the user to set the supervisor menus for each admin level.

**1.** Follow the steps in <u>Accessing Supervisor Accounts</u> section.

### 2. Click **Permissions** tab. The **Permissions** page is displayed.

OfficeServ ACD Superv	isor	🔯 05:02:39 PM 🛛 🕅	LOGOUT
🕑 Default Supervisor	📓 System Configuration > Supervisor Accounts		
System Configuration	Accounts Permissions Password		
Server Connections     Port Assignments	Admin Level 1	Agont Configuration	
<ul> <li>System Options</li> <li>Completion Codes</li> </ul>	Image: System connections     Image: System connections       Image: System connections     Image: System connections	Agent Configuration     Phone-Only Agent Configuration	
ACD Configuration <ul> <li>Division Definition</li> <li>Group Definition</li> </ul>	Supervisor Accounts     System Options     One System Options     One System Control of Completion Codes     Supervisor Codes	✓ Assign Agent Splits ✓ Agent Permissions Codes	
<ul> <li>▶ Split Definition</li> <li>▶ IVR Assignments</li> <li>▶ Assign Completion Codes</li> </ul>	Call Routing Supervisor Control	Live Monitoring	
Agent Configuration   Agent Configuration  Phone-Only Agent Configuration  Assign Agent Splits  Agent Parmiseione	<ul> <li>✓ IVR Routing Schedule</li> <li>✓ Agent Blending</li> <li>✓ CLI/DID Routing</li> <li>✓ Messaging</li> <li>✓ Skill-Based Routing</li> <li>✓ Callback List</li> <li>✓ Abandoned Call List</li> <li>✓ Completion Code His</li> <li>✓ Supervisor Work His</li> </ul>	story	
Call Routing    IVR Routing Schedule   CLI/DID Routing   Skill-Based Routing			
Supervisor Control  Messaging Callback List			
Abandoned Call List     Completion Code History     Supervisor Work History			
		Local intranet 🔍 100%	-

- *3.* Select the Admin Level from the dropdown list.
- **4.** Select the corresponding checkbox to provide permission for the Supervisor. Once the check box is selected, automatically the permission is saved for the selected admin level.

### Password

The [Password] tab allows the current log-in supervisor to modify the password.

- 1. Follow the steps in <u>Accessing Supervisor Accounts</u> section.
- 2. Click **Password** tab. The **Password** page is displayed.
- *3.* Current Password Enter the current password.
- *4.* **New Password** —Enter the new password.
- 5. Confirm New Password Enter the new password again.
- **6.** Click **Save** to change the password.

OfficeServ ACD Superv	isor	🔯 05:08:45 PM	() LOG
Default Supervisor	ត្វៀ System Configuration > Supervisor Accounts		
System Configuration	Accounts Permissions Password		
Server Connections			
Port Assignments	Current Password:		
<ul> <li>Supervisor Accounts</li> </ul>	New Password:		
System Options	Confirm Password:		
Completion Codes			
ACD Configuration	Save		
Division Definition			
Group Definition			
<ul> <li>Split Definition</li> </ul>			
IVR Assignments			
Assign Completion Codes			
Agent Configuration			
Agent Configuration			
Phone-Only Agent			
Configuration			
Assign Agent Splits			
Agent Permissions			
Call Routing			
IVR Routing Schedule			
CLI/DID Routing			
Skill-Based Routing			
Supervisor Control			
▶ Messaging			
<ul> <li>Callback List</li> </ul>			
Abandoned Call List			
Completion Code History			
Supervisor Work History			
)			
		cal intranet	100%

# System options

The System options allows the user to configure System Options.

## **Accessing System Options**

The below section describes how to access the System Option page.

- **1.** Click **System Options** on the Supervisor left pane.
- **2.** The **System Options** page is displayed.

### **Call center**

The [Call Center] tab allows the user to configure the system options for the whole ACD Module.

- 1. Follow the steps in <u>Accessing System Options</u> section.
- 2. Click Call Center tab. By default this page is displayed.
- *3.* The System Option List page is displayed.



5. The status of System Option indicates the following:

- Indicates that the System Option is not in use.
- 😒 Indicates that the System Option is in use.

#### **Modify Option**

The [Edit] option allows the user to modify the selected System Option list.

- *1.* Follow the steps in <u>Accessing System Options</u> section.
- **2.** The Edit Option is displayed.

Edit Option						
🗹 Usable	Option Type:	Abandon Threshold	*	Save		
	Value:					

*3.* Select a option by clicking on the option name.

OR

- **4.** Select the **Option Type** from the dropdown list in **Edit Option** section.
  - Abandon Threshold It is the max time duration during which the agent can receive the call, if the agent doesn't receive the call during this period then the call is called abandon

call, and the time duration is called Abandon threshold.

- Ring Time Before Auto Answer
  - ➤ Time Enter the ring time before the agent application automatically answers the call in milliseconds.
  - > Click **Usable** checkbox to indicate whether to use this option.
- Break Types
  - > Click **Usable** checkbox to indicate whether to use this option.
  - Description Enter the Agent Break Type description. The user can enter up to 8 Break Types. For example, Personal Break, Meeting etc.
- **Default Split** Select the default call routing split by clicking on (...) **Browse** button. The calls are routed to this split when there is no destination split available.
- Call Recorder
  - > Click **Usable** checkbox to indicate whether to use this option.
  - IVR Server To start recording conversation in Agent application; select the IVR Server IP address or DNS name.
- Queue Message Setup
  - Max Queue Time Enter the wait time for the RAD/IVR call to wait in the Queue if RAD/IVR ports are not available.
  - Priority [Greeting Msg or Queue Msg] Select either to play Greeting Msg or Queue Msg, when an IVR/RAD port becomes available to a queued call.
  - Overflow To [Phone number or Split] If the call is waiting in the RAD/IVR queue for more than "Max Queue Time", then select the Overflow Destination from the dropdown list.
    - If Overflow To is Split, then select the Overflow Destination, by clicking on (...) Browse button

OR

- > If **Overflow To** is **Phone Number**, then enter the phone number.
- Non-Trunk Routing Specify the routing sequence (DID, CLI, IVR) for calls which are incoming from non trunk ports.

#### NOTE Non-Trunk Ports

Ports not configured in Central Office Trunks section in System Options page of **Supervisor** application.

- > Node ID Select the Node ID from the dropdown list.
- Routing Seq Select the sequence of call to be routed from the dropdown list.
- Supervisor Number If this number is configured then Agent can make a call to this

number directly using the "Supervisor Assistance" icon in Agent application.

- > Click **Usable** checkbox to indicate whether to use this option.
- Enter the Supervisor Phone number.
- VIP Level In case of non-availability of agent, VIP call is set at the front of split queue.

#### NOTE VIP agent

If VIP agent is not available, then the general agent is searched to serve the VIP call.

- Click **Usable** checkbox to indicate whether to use this option.
- Level Any call received from IVR with customer level equal or less than to this VIP level is considered as a "VIP" call in the ACD. For example, if the VIP level is set to 2, the call with customer level 1 or 2 is VIP call. The VIP call is routed to the agent who is allowed to serve the VIP call.



#### VIP Level

Refer Agent Configuration for more details.

5. Click Save to save the modified information.

### Protection

The [Protection] tab allows the user to provide access authorization to Application Settings pages.

- **1.** Follow the steps in <u>Accessing System Options</u> section.
- **2.** Click **Protection** tab. The **Protection** page is displayed.
- **3.** Click the **Enable Maintenance Password for Application Settings Page** checkbox to enable this feature.
- *4.* **Current Password** Enter the current password.
- **5.** New Password —Enter the new password.
- **6.** Confirm New Password Enter the new password again.
- **7.** Click **Save** to change the password.

OfficeServ ACD Superv	sor	🕑 10:57:16 AM	🕅 LOGOUT
Default Supervisor	📓 System Configuration > System Options		
System Configuration	Call Center Protection License Information Application Settings		
Server Connections			
► Port Assignments	Enable Maintenance Password for Application pages		
► Supervisor Accounts	Current Password:		
▹ System Options	New Password:		
Completion Codes	Confirm Password:		
ACD Configuration			
Division Definition	Save		
► Group Definition			
► Split Definition			
► IVR Assignments			
Assign Completion Codes			
Agent Configuration			
Agent Configuration			
Phone-Only Agent			
Configuration			
► Assign Agent Splits			
Agent Permissions			
Call Routing			
► IVR Routing Schedule			
► CLI/DID Routing			
<ul> <li>Skill-Based Routing</li> </ul>			
Supervisor Control			
▶ Messaging			
Callback List			
Abandoned Call List			
Completion Code History			
Supervisor Work History			
<			
		A	1009/ -

## **License Information**

The [License Information] tab allows the user to view the current License Information.

- 1. Follow the steps in <u>Accessing System Options</u> section.
- 2. Click License Information tab. The License Information page is displayed.
- *3.* It displays the current License Information along with the following details:
  - Simultaneous Systems
  - Total Supervisors
  - Total Reporting
  - Active Wallboards
  - RAD or IVR
  - RAD or IVR ports
  - ACD Agents
  - Phonebook
  - Outbound Campaigns

OfficeServ ACD Superv	isor					🔯 10:57:45 AM	() LOGOUT
Default Supervisor	📓 System Configuration >	System	Options				
System Configuration	Call Center Protection	Licen	se Information Applie	cation S	Settings		
<ul> <li>Server Connections</li> </ul>							
▶ Port Assignments	Current License (KICR)	OMW-EYP	CER CR-LRGWMOOE-GNZEW				
Supervisor Accounts					···,		
<ul> <li>System Options</li> </ul>	Simultaneous Systems:	2	Total Supervisors:	3	Total Reporting:	3	
Completion Codes	Active Wallboards:	2	RAD or IVR:	IVR	RAD/IVR Ports:	20	
ACD Configuration	ACD Agents:	10	Phonebook:	No	Outbound Campaigns:	No	
Division Definition							
▶ Group Definition							
▶ Split Definition							
► IVR Assignments							
<ul> <li>Assign Completion Codes</li> </ul>							
Agent Configuration							
Agent Configuration							
Phone-Only Agent							
Configuration							
Assign Agent Splits							
► Agent Permissions							
Call Routing							
► IVR Routing Schedule							
► CLI/DID Routing							
► Skill-Based Routing							
Supervisor Control							
► Messaging							
► Callback List							
Abandoned Call List							
Completion Code History							
Supervisor Work History							
<	J						
					🧐 L	ocal intranet 🛛 🚭	100% 🔻 👉

# Application Settings

The [Application Settings] tab allows the user to view/modify the IP settings and data archiving.

- *1.* Follow the steps in <u>Accessing System Options</u> section.
- **2.** Click **Application Settings** tab. The **Application Settings** page is displayed.



#### Application Settings

If password is set in **Protection** page, then the user has to enter the password, then the **Application Settings** page is displayed.

OfficeServ ACD Supervi	isor	🕑 10:58:21 AM	🕅 LOGOUT
🕑 Default Supervisor	🖬 System Configuration > System Options		
System Configuration	Call Center Protection License Information Application Settings		
<ul> <li>Server Connections</li> <li>Port Assignments</li> </ul>	Server IP Address or DNS Name		
► Supervisor Accounts	Link Server: localhost		
System Options	ACD Sequer		
► Completion Codes			
ACD Configuration	SQL Server: ANURADHAS		
Division Definition	Save		
► Group Definition			
▶ Split Definition			
► IVR Assignments	Raw Call Log Archiving		
<ul> <li>Assign Completion Codes</li> </ul>	Raw Call Log Archiving		
Agent Configuration	Store Logs (Days): 90 🗸		
Agent Configuration	Clear at: 12: 30 AM 🗸		
Phone-Only Agent			
Configuration	Call Summary Archiving		
<ul> <li>Assign Agent Splits</li> </ul>	Archive at: 12 · 10 AM V		
► Agent Permissions			
Call Routing	Daily Wallboard Reset		
► IVR Routing Schedule	Reset at: 8 : 00 AM V		
► CLI/DID Routing			
▶ Skill-Based Routing	Save		
Supervisor Control			
▶ Messaging	Manually Run Summary		
► Callback List			
Abandoned Call List	Sum Data For: 04/06/2008		
Completion Code History			
Supervisor Work History	Run		
Done	Sector Sect	cal intranet 🔍 🔍	100% -

#### Server IP Address or DNS Name

Server Configuration allows the user to change Link, SQL and ACD server IP Address or DNS name.

- 1. Follow the steps in <u>Application Settings</u> section.
- *2.* Enter the required changes:
  - Link Server
  - ACD Server
  - SQL Server
- **3.** Click **Save** to update the new server details.

### **Raw Call Log Archiving**

Raw Call Log Archiving option allows the user to manually summarize the call data.

- 1. Follow the steps in <u>Application Settings</u> section.
- *2.* Enter the required changes:
  - Store Logs (Days) Select the call log removal interval from the dropdown list.

- Clear at Enter the time to remove the debugging log.
- Call Summary Archiving Enter the call data archiving time.
- Daily Wallboard Reset Enter the daily reset time for Wallboard data.
- **3.** Click **Save** to update the call archiving details.

#### **Manually Run Summary**

This option allows the supervisor to create the summary of data which is stored in the database (existing monitoring data).

- 1. Follow the steps in <u>Application Settings</u> section.
- *2.* Select the date from the calendar.
- *3.* Click **Run** to update the call archiving details.

### **Completion Codes**

The Completion Code allows the user to register the completion codes for each call in Agent Application.

## **Accessing Completion Codes**

The below section describes how to access the Completion Code page.

- *1.* Click **Completion Codes** on the Supervisor left pane.
- **2.** The Completion Code List page is displayed.
- *3.* The status of completion code indicates the following:
  - Indicates that the code is not in use.
  - 🕤 Indicates that the code is in use.

OfficeServ ACD Superv	sor	🔯 11:00:28 AM	🕅 LOGOUT
Default Supervisor	Bystem Configuration > Completion Codes		
System Configuration	Q Completion Code List		
► Server Connections	h combring colorist		
► Port Assignments			
► Supervisor Accounts	t≜r Business		
► System Options	± Marketing		
Completion Codes	Product		
ACD Configuration	🗄 sales		
Division Definition			
▶ Group Definition			
▶ Split Definition			
► IVR Assignments			
<ul> <li>Assign Completion Codes</li> </ul>			
Agent Configuration			
Agent Configuration			
Phone-Only Agent			
Configuration			
▶ Assign Agent Splits	Add Completion Code		
<ul> <li>Agent Permissions</li> </ul>	V Aud completion code		
Call Routing	Save Delete		
► IVR Routing Schedule	ID: Name:		
CLI/DID Routing			
Skill-Based Routing			
Supervisor Control			
▶ Messaging			
► Callback List			
Abandoned Call List			
Completion Code History			
Supervisor Work History			
<			
	tocali	ntranet 🕀	100% •

## Add Completion Code

The [Add] option allows the user to add the complete codes.

- 1. Follow the steps in <u>Accessing Completion Codes</u> section.
- *2.* The Add Completion Code is displayed.



- *3.* Enter the following information:
  - ID
  - Name

4. Click Save to add the completion code.

### Modify Completion Code

The [Edit] option allows the user to modify the selected Completion Code.

1. Follow the steps in <u>Accessing Completion Codes</u> section.

*2.* Select a Code by clicking on Code name.

Generation Code				
Add Minor Code Save Delete				
ID: BU Name: Business				

- *3.* The Edit Completion Code section is displayed.
- 4. Enter the required changes.
- 5. Click Save to save the modified Completion Code information.

### **Delete Completion Code**

The [Delete] option allows the user to delete the selected Completion Code.

- 1. Follow the steps in <u>Accessing Completion Codes</u> section.
- **2.** Select a Code by clicking on (B) Code name.
- *3.* The Edit Completion Code is displayed.
- 4. Click 'Delete' button, a message, "Are you sure to remove Completion Code?" is displayed.
- **5.** Click **OK** to delete the Completion Code.

### Add Minor Code

The [Add] option allows the user to add a minor code to the selected completion codes.

- **1.** Follow the steps in <u>Accessing Completion Codes</u> section.
- *2.* Select a code by clicking on the Code name.
- 3. Click Add Minor Code on Edit Completion Code page. The Add Minor Code is displayed.



- **4.** Enter the following information:
  - ID
  - Name
- 5. Click Save to add the minor code.

# **Modify Minor Code**

The [Edit] option allows the user to modify the selected Minor Code.

- *1.* Follow the steps in <u>Accessing Completion Codes</u> section.
- *2.* Select a minor code by clicking on Minor Code name.
- *3.* The Edit Minor Code is displayed.

Edit Minor Code		
☑ Usable	Save	Delete
ID: Bu	Name: Paper Busin	less

- 4. Enter the required changes.
- 5. Click Save to save the modified minor code information.

### **Delete Minor Code**

The [Delete] option allows the user to delete the selected Minor Code.

- **1.** Follow the steps in <u>Accessing Completion Codes</u> section.
- 2. Select a Code by clicking on Minor Code name.
- *3.* The Edit Minor Code is displayed with corresponding details of selected code.
- 4. Click 'Delete' button, a message, "Are you sure to remove Completion Code?" is displayed.
- 5. Click **OK** to delete the minor code.
# **CHAPTER 4. ACD Configuration**

This section describes the features related to ACD configuration.

## **Division Definition**

A Division is collection of Groups.

#### **Accessing Division Definition**

The below section describes how to access the Division Definition page.

- **1.** Click **Division Definition** on the Supervisor left pane.
- 2. The Division Definition page with Division List is displayed.
- *3.* The status of Division indicates the following:
  - Indicates that the division is not available.
  - 🔵 Indicates that the division is available.



## Add

The [Add] option allows the user to add the Division.

- *1.* Follow the steps in <u>Accessing Division Definition</u> section.
- *2.* The **Add Division** is displayed.

Add Division	
	Save Delete
Name:	Description

- *3.* Enter the following information:
  - Name
  - Description
- 4. Click Save to add the Division.

#### Modify

The [Edit] option allows the user to modify the selected Division.

- **1.** Follow the steps in <u>Accessing Division Definition</u> section.
- 2. Select a division by clicking on the division name.
- **3.** The Edit Division is displayed.



- 4. Enter the required changes.
- 5. Click Save to the modified division information.

#### Delete

The [Delete] option allows the user to delete the selected Division.

- **1.** Follow the steps in <u>Accessing Division Definition</u> section.
- 2. Select a division by clicking on the division name.
- *3.* The Edit Division section is displayed.

- 4. Click 'Delete' button, a message, "Are you sure to remove Division?" is displayed.
- **5.** Click **OK** to delete the division.

## **Group Definition**

Group is collection of Splits.

## **Accessing Group Definition**

The below section describes how to access the Group Definition page.

- **1.** Click **Group Definition** on the Supervisor left pane.
- 2. The Group Definition page with Group List is displayed.

OfficeServ ACD Superv	sor	🔯 11:15:36 AM	🕅 LOGOUT
Default Supervisor	d ACD Configuration > Group Definition		
System Configuration  Server Connections  Port Assignments  Supervisor Accounts  System Options  Completion Codes  ACD Configuration  Division Definition  Signup Definition  Split Definition  VIR Assignments  Account Code Servers	Group List     Default Division     Oefault Group     Agent 1     Agent 2     Agent 3     Marketing     Marketing		
Assign Configuration Agent Configuration Phone-Only Agent Configuration Assign Agent Splits Agent Permissions	Add Group		
Call Routing + IVR Routing Schedule + CLI/DID Routing + Skill-Based Routing Supervisor Control + Messaging + Callback List + Abandroad Call List	Save Delete		
Completion Code History Supervisor Work History	Cocal Cocal	intranet 🗨	100% •

*3.* The status of group indicates the following:

- Indicates that the group is not available.
- 🔵 Indicates that the group is available.

## Add

The [Add] option allows the user to add the group.

- *1.* Follow the steps in <u>Accessing Group Definition</u> section.
- **2.** The Add Group is displayed.

Add Group	
	Save Delete
Name:	

- *3.* Name Enter the group name.
- **4.** Click **Save** to add the group.

#### Modify

The [Edit] option allows the user to modify the group.

- **1.** Follow the steps in <u>Accessing Group Definition</u> section.
- *2.* Select a group by clicking on the group name.
- *3.* The **Edit Group** is displayed.

Edit Group		
	Save	Delete
Name: Agent 1		

- 4. Enter the required changes.
- 5. Click Save to save the modified group information.

#### Delete

The [Delete] option allows the user to delete the selected group.

- 1. Follow the steps in <u>Accessing Group Definition</u> section.
- 2. Select a group by clicking on the group name.
- *3.* The Edit Group is displayed.
- 4. Click 'Delete' button, a message, "Are you sure to remove Group?" is displayed.
- **5.** Click **OK** to delete the group.

#### **Split Definition**

Split is defined as a unit of call routing, group of agents with skill/level.

## **Accessing Split Definition**

The below section describes how to access the Split Definition page.

- **1.** Click **Split Definition** on the Supervisor left pane.
- 2. The Split Definition page with Split List is displayed.
- *3.* The status of split indicates the following:
  - Indicates that the split is not available.
  - 🔵 Indicates that the split is available.

OfficeServ ACD Superv	sor								🞯 02:03:32 PM	🕅 LOGOUT
Default Supervisor	ACD Configuration >	Split Defin	ition							
System Configuration		🔍 Split	List							
Server Connections     Port Assignments     Supervisor Accounts		⊡ Defau ⊡ Def	I <b>t Division</b>							
<ul> <li>System Options</li> <li>Completion Codes</li> </ul>			Name	Split Type	Queue Message Time		Overflow			
ACD Configuration		9	Default Split	I	10					
Division Definition		9	ACD SVC	I	10	10sec -> /	ACD SVC2			
<ul> <li>Group Definition</li> </ul>		0	ACD SVC2	I	10	10sec -> 0	Default Split			
<ul> <li>Split Definition</li> </ul>										
<ul> <li>IVR Assignments</li> <li>Assign Completion Codes</li> </ul>										
<ul> <li>Agent Configuration</li> <li>Phone-Only Agent</li> <li>Configuration</li> <li>Assign Agent Splits</li> <li>Agent Permissions</li> </ul>			Q Add S	Split						
Call Routing			🗹 Usable				Save D	elete		
IVR Routing Schedule				Name:			Split Type Inbound	~		
<ul> <li>CLI/DID Routing</li> </ul>			Queue Me	ssage Time:	10 [se	c]	Wrap-up Time: 10 [se	ec]		
<ul> <li>Skill-Based Routing</li> </ul>			Use Comp	letion Code:	Yes 💙					
Supervisor Control • Messaging • Callback List • Abandoned Call List • Completion Code History • Supervisor Work History Live Monitoring • System Overview • Agent Monitoring			Allow Ove	rflows						
								🧔 😜 Interne	t 🔍	100% -

### Add

The [Add] option allows the user to add the Split Definition.

- *1.* Follow the steps in <u>Accessing Split Definition</u> section.
- *2.* The **Add Split** is displayed.

Add Split			
✓ Usable			Save Delete
Name:		Split Type	Inbound 💌
Queue Message Time:	10 [sec]	Wrap-up Time:	10 [sec]
Use Completion Code:	Yes 🔽		
Allow Overflows			

- *3.* Enter the following information:
  - Click Usable checkbox to indicate whether the Split is available or not.
  - Split Type Select the type from the dropdown list.
  - **Queue Message Time** Enter the time (sec) for the caller to wait in the split queue befo re going to the RAD/IVR to hear the wait comfort message.
  - Wrap-up Time Wrap-up time for agent primarily logged on to this split.
  - Use Completion Code Select to indicate whether to use the code or not.
  - Allow Overflows Usability of call overflow features. (Default: No Overflow) On sele cting this check box, following fields are displayed.

Edit Split			
✓ Usable		[	Save Delete
Name:	Default2	Split Type	Inbound 💌
Queue Message Time:	10 [sec]	Wrap-up Time:	10 [sec]
Use Completion Code:	Yes 💌		
Allow Overflows			
Overflow After:	10 [sec]		
Go to:	Split Default Split		

- > Overflow After Enter the sec to overflow after the specified period.
- **Go to** Select the split name by clicking on the **Split** button.

4. Click Save to add the split.

#### Modify

The [Edit] option allows the user to modify the selected split.

- 1. Follow the steps in <u>Accessing Split Definition</u> section.
- 2. Select a split by clicking on the split name.
- *3.* The Edit Split is displayed.

🔍 Edit Split		
✓ Usable		Save Delete
Name:	Default2	Split Type Inbound 💌
Queue Message Time:	10 [sec]	Wrap-up Time: 10 [sec]
Use Completion Code:	Yes 🔽	

Allow Overflows

- 4. Enter the required changes.
- 5. Click Save to save the modified split information.

#### Delete

The [Delete] option allows the user to delete the selected split.

- *1.* Follow the steps in <u>Accessing Split Definition</u> section.
- 2. Select a split by clicking on the split name.
- *3.* The **Edit split** is displayed.
- 4. Click 'Delete' button, a message, "Are you sure to remove Split?" is displayed.
- **5.** Click **OK** to delete the split.

### **IVR Assignments**

When the caller enters DTMF input during IVR service, IVR determines the service code based on the DTMF input and transfers the call to ACD. The call received from IVR is routed to the split which is associated with the caller service code.

#### Accessing IVR Assignments

The below section describes how to access the IVR Assignments page.

**1.** Click **IVR Assignments** on the Supervisor left pane.

*2.* The **IVR Assignments** page with **IVR Service List** is displayed.

*3.* The status of each IVR service indicates the following:

- Indicates that the IVR service is not in use.
- <sup>(c)</sup> Indicates that the IVR service is in use.

OfficeServ ACD Superv	isor 👸 11:20:36 AM	🕅 LOGOUT
Default Supervisor	ACD Configuration > IVR Assignments	
System Configuration  Server Connections  Port Assignments  Supervisor Accounts	IVR Service List     Default Division     Default Group	
System Options     Completion Codes  ACD Configuration	Gent 1     Gent	
<ul> <li>Division Definition</li> <li>Group Definition</li> <li>Split Definition</li> <li>IVR Assignments</li> <li>Assign Completion Codes</li> </ul>	Split 2     Abandoned Call     Agent 2	
Agent Configuration  Agent Configuration  Phone-Only Agent Configuration	i <sup>th</sup> Agent 3	
<ul> <li>Assign Agent Splits</li> <li>Agent Permissions</li> </ul>	Add IVR Service	
Call Routing IVR Routing Schedule CLI/DID Routing Skill-Based Routing	Usable     Save     Delete       Service Name:     Description:	
Supervisor Control + Messaging + Callback List + Abandoned Call List + Completion Code History + Supervisor Work History		
	😌 Local intranet 🛛 👻	100% 🔹 🧮

## Add

The [Add] option allows the user to add the IVR Service.

- 1. Follow the steps in <u>Accessing IVR Assignments</u> section.
- *2.* The Add IVR Service is displayed.

Q Add IVR Service						
🗹 Usable			Save Delete			
Service Name:		Description:				
Select Split:	Split 2		Split			

*3.* Select the **Split** by clicking on the tree menu in the order of Division, Group and Split. OR

*4.* Click on **Split Browse** button and select the split from the pop-up page.

🖉 Select Split Webpage Dialog	×
Split List	
Default Division     Default Group     Agent 1     Split 1     Split 2     Agent 2     Agent 3     Marketing	
ок	

**5.** Enter the following information:

- Click Usable checkbox to indicate whether the service is available or not.
- Service Name
- Description

**6.** Click **Save** to add the IVR Service.

#### Modify

The [Edit] option allows the user to modify the selected IVR Service.

- 1. Follow the steps in <u>Accessing IVR Assignments</u> section.
- 2. Select a IVR Service by clicking on the service name.
- *3.* The Edit IVR Service is displayed.

Edit IVR Service					
✓ Usable			Save Delete		
Service Name:	Abandoned Call	Description:	Abandoned Call		
Select Split:	Split 2		Split		

- 4. Enter the required changes.
- *5.* Click **Save** to save the modified IVR Service.

## Delete

The [Delete] option allows the user to delete the selected IVR Service.

- **1.** Follow the steps in <u>Accessing IVR Assignments</u> section.
- 2. Select a IVR Service by clicking on the service name.
- *3.* The Edit IVR Service is displayed.
- 4. Click 'Delete' button, a message, "Are you sure to remove IVR Service?" is displayed.
- **5.** Click **OK** to delete the service.

## **Assign Completion Codes**

This page allows the user to assign the completion codes to each split.

Assign Completion Code
Completion codes should be created in the Completion Codes page prior to assignment. Refer Completion Code for more details.

## **Accessing Assign Completion Codes**

The below section describes how to access the Assign Completion Codes page.

- **1.** Click Assign Completion Codes on the Supervisor left pane.
- 2. The Assign Completion Codes page with Split List is displayed.
- 3. Select the Split by clicking on the tree menu in the order of Division, Group and Split.
- 4. Click Minor Code checkbox of corresponding Completion Code.

OfficeServ ACD Superv	isor	🔯 11:25:03 AM	() LOGOUT
Default Supervisor	ជា ACD Configuration > Assign Completion Codes		
System Configuration	Split List		^
Server Connections	4		
▶ Port Assignments	🖶 Default Division		
► Supervisor Accounts			
► System Options			
Completion Codes			
ACD Configuration			
Division Definition			
► Group Definition			
▶ Split Definition			
► IVR Assignments			
Assign Completion Codes			
Agent Configuration			=
Agent Configuration			
Phone-Only Agent			
Configuration			
<ul> <li>Assign Agent Splits</li> </ul>	Assign Completion Codes		
► Agent Permissions	Whisigh completion codes		
Call Routing	Save		
IVR Routing Schedule	Pusinosa Markating		
CLI/DID Routing	Business Marketing		
Skill-Based Routing	Business Marketing1		
Supervisor Control			
▶ Messaging			
► Callback List			_
Abandoned Call List			
Completion Code History			
Supervisor Work History	Product sales		
<	no codes		~
Done	Local intr	anet 🔍	100% • .:

**5.** Click **Save** to assign Completion Code.

# **CHAPTER 5. Agent Configuration**

#### **Agent Configuration**

This page allows the user to create/modify/delete agent to serve the calls routed to ACD splits.

#### **Accessing Agent Configuration**

The below section describes how to access the Agent Configuration page.

**1.** Click **Agent Configuration** on the Supervisor left pane.

**2.** The Agent Configuration page with Agent List is displayed.

OfficeServ ACD Supervi	isor				🔯 11:25:41 AM	() LOGOUT
Default Supervisor	🚮 Agent Configuration > Agent Configu	ration				
System Configuration	Agent List					
Server Connections     Port Assignments     Supervisor Accounts     System Options     Completion Codes  ACD Configuration     Division Definition     Group Definition     Split Definition     IVR Assignments     Assign Completion Codes  Agent Configuration		agent 1 - Level 9 9 - Agent 3 - Level 9 ucts				
<ul> <li>Agent Configuration</li> <li>Phone-Only Agent</li> <li>Configuration</li> <li>Assign Agent Splits</li> <li>Agent Permissions</li> </ul>	Add Agen	t				
Call Routing	✓ Usable Secur	ity Level: 9 💌	Reset Pass	word Save Dele	te	
<ul> <li>IVR Routing Schedule</li> <li>CLI/DID Routing</li> <li>Skill-Based Routing</li> </ul>	ID: Can Handle: Description:	VIP Calls	Name: No-Answer:	Set Agent to Break	•	
Supervisor Control	Split:	Split 1				
Messaging     Callback List     Abandoned Call List     Completion Code History     Supervisor Work History						
Done				S Local intr	ranet 🔍	100% 🔹 🛒

*3.* The status of each Agent indicates the following:

- Indicates that the Agent is not available.
- 💿 Indicates that the Agent is available.

#### Add

The [Add] option allows the user to add an Agent.

- **1.** Follow the steps in <u>Accessing Agent Configuration</u> section.
- *2.* The Add Agent is displayed.

Add Agent								
Usable Secur	ity Level: 9 💌	Reset Pass	word Save Delete					
ID:		Name:						
Can Handle:	VIP Calls	No-Answer:	Set Agent to Break					
Description:								
Split:	Split 1							

*3.* Enter the following information:

- Click Usable checkbox to indicate whether the Agent is available or not.
- Select the Agent Security Level from the dropdown list.



- Login ID Enter the Agent login ID.
- Name Enter the Agent Name.
- Can Handle Select this option to allow the Agent to handle the VIP calls.



VIP Call

Refer to in "System Options  $\rightarrow$  Call Center" page for details.

- No-Answer If the Agent doesn't answer the call, select the status to display in Agent application.
- **Description** Enter description about the Agent.
- Split Select the log-in split for the Agent by clicking on the Browse (...) button.



OR

- Select the Split by clicking on the tree menu in the order of Division, Group and Split.
- **4.** Click **Save** to add the Agent.

## Modify

The [Edit] option allows the user to modify the selected Agent details.

- *1.* Follow the steps in <u>Accessing Agent Configuration</u> section.
- 2. Select an Agent by clicking on the Agent name.
- *3.* The Edit Agent is displayed.

Edit Agent								
✓ Usable Secur	ity Level: 9 💌	Reset Pass	word Save Delete					
ID:	A3	Name:	Agent 3					
Can Handle:	VIP Calls	No-Answer:	Set Agent to Break 🛛 🗸					
Description:	Agent 3							
Split:	Split 1							

4. Enter the required changes.



5. Click Save to save the modified Agent information.

### Delete

The [Delete] option allows the user to delete the selected Agent details.

- 1. Follow the steps in <u>Accessing Agent Configuration</u> section.
- *2.* Select an Agent by clicking on the Agent name.
- *3.* The **Edit Agent** is displayed.
- 4. Click 'Delete' button, a message, "Are you sure to remove Agent?" is displayed.

5. Click **OK** to delete the Agent.

#### **Reset Password**

The [Reset Password] option allows the supervisor to reset Agent password.

- **1.** Follow the steps in <u>Accessing Agent Configuration</u> section.
- *2.* Select an Agent by clicking on the Agent name.
- *3.* The **Edit Agent** is displayed.
- 4. Click 'Reset Password' button, a message, "(Agent name) password will be reset to '4321'. Continue?'
- **5.** Click **OK** to change the password.

#### **Phone-only Agent Configuration**

This page allows the user to create/modify/delete agent who serves the ACD call without PC (Agent program).

#### **Accessing Phone-only Agent Configuration**

The below section describes how to access the Phone-only Agent Configuration page.

- **1.** Click **Phone-only Agent Configuration** on the Supervisor left pane.
- 2. The Phone-only Agent Configuration page with Agent List is displayed.

#### Add

The [Add] option allows the user to add the Phone only Agent details.

- 1. Follow the steps in <u>Accessing Phone-only Agent Configuration</u> section.
- *2.* The **Add Agent** is displayed.
- *3.* Enter the following information:
  - Click Usable checkbox to indicate whether the Agent is available or not.
  - Login ID Enter the Agent login ID.
  - Name Enter the Agent Name.
  - Phone Select the Agent phone number from the dropdown list.

• **Can Handle** — Select this option to allow the Agent to handle the blended calls or VIP calls.

 NOTE
 VIP Call

 Refer to in "System Options → Call Center" page for details.

- No-Answer If the Agent doesn't answer the call, select the status to display in Agent application.
- **Description** Enter description about the Agent.
- Split Select the log-in split for the Agent by clicking on the Browse (...) button.



Split

Agent can logon to maximum eight splits. The Agent Configuration page sets the primary split only. The multi-split assignment is configured in "Assign Agent Splits" page.

OR

• Select the Split by clicking on the tree menu in the order of Division, Group and Split.

**4.** Click **Save** to add the Agent.

## Modify

The [Edit] option allows the user to modify the selected Agent details.

- 1. Follow the steps in <u>Accessing Phone-only Agent Configuration</u> section.
- *2.* Select an Agent by clicking on the Agent name.
- *3.* The Edit Agent is displayed with corresponding details of selected Agent.

#### 🔍 Edit Agent

🗹 Usable			Save Delete
Login ID:	A2010	Name:	Agent 10
Phone:	2010 💌	Skill:	Agent Level 9 (Lowe 💙
Can Handle:	VIP Calls	No-Answer:	Set Agent to Break 💌
Description:	Agent 10		
Split:	Default Split		

- 4. Enter the required changes.
- 5. Click Save to save the modified Agent information.

#### Delete

The [Delete] option allows the user to delete the selected Agent details.

- *1.* Follow the steps in <u>Accessing Phone-only Agent Configuration</u> section.
- *2.* Select an Agent by clicking on the Agent name.
- *3.* The Edit Agent is displayed with corresponding details of selected Agent.
- 4. Click 'Delete' button, a message, "Are you sure to remove Agent?" is displayed.
- **5.** Click **OK** to delete the Agent.

### **Assign Agent Splits**

This page allows the user to assign the agents to multiple splits (max eight splits).

#### Accessing Assign Agent Splits

The below section describes how to access the Assign Agent Splits page.

- **1.** Click **Assign Agent Splits** on the Supervisor left pane.
- 2. The Assign Agent Splits page with Agent List is displayed.

### By Agent

- 1. Follow the steps in <u>Accessing Assign Agent Splits</u> section
- 2. Click **By Agent** tab. By default this page is displayed.
- *3.* The Agent List page is displayed.
- **4.** In Assign Split to Agent:
  - Select the Agent by clicking on the tree menu in the order of Agent List/Agent.
  - Select the check box Division/Group/Split by clicking on the check box.
  - Assign the Split Priority and Skill Level for the selected Agent.
- 5. Click Save to update the Agent split details.

OfficeServ ACD Supervis	sor			03:2	9:37 PM	🕅 LOGOUT
Default Supervisor	🚮 Agent Confi	guration > Assign Agent Splits				
Point Assignments     Supervisor Accounts     System Options     Completion Codes  ACD Configuration     Division Definition     Group Definition     Group Definition     Split Definition     IVR Assignments     Assign Completion Codes  Agent Configuration     Phone-Only Agent     Configuration     Assign Agent Splits     Agent Permissions  Call Routing     IVR Routing Schedule	By Agent E	y Split Skill Levels  Agent List  Agent 1 Split - Priority 1 - Agent Level 6 Product - Priority 2 - Agent Level 4 Agent 2 Agent 3 Agent 3 Agent 6				
<ul> <li>Skill-Based Routing</li> </ul>	G	Assign Split to Agent				
Supervisor Control		· · · · · · · · · · · · · · · · · · ·			Save	
► Callback List		Division / Group / Split	Split Priority	Skill Level		
Abandoned Call List		Default Division /Default Group /Default Split	0 (Lowest) 💌	Level 9 is least (Lowest)	*	
► Completion Code History		Default Division /Default Group /SPILT6	0 (Lowest) 🔽	Level 9 is least (Lowest)	~	
<ul> <li>Supervisor Work History</li> </ul>		Default Division /Agent 1 /Split 1	1 (Highest) 💌	Agent Level 6	~	
Live Monitoring		Default Division /Agent 1 /Split 2	0 (Lowest) 💌	Level 9 is least (Lowest)	~	
► System Overview	<b>v</b>	Marketing /Marketing of products /Product	2 💌	Agent Level 4	~	
► Agent Monitoring						
< >						
Done				Si Local intranet		100% -

## By Split

- 1. Follow the steps in <u>Accessing Assign Agent Splits</u> section
- 2. Click **By Split** tab. The **By Split** page is displayed.
- **3.** The **Split List** page is displayed.
- 4. In Assign Agents to Split:
  - Select the Split by clicking on the tree menu in the order of Division/Group/Split.
  - Select the check box Agent Name by clicking on the check box.
  - Assign the Split Priority and Skill Level for the selected Agent.
- **5.** Click **Save** to update the Split level.

Default Supervisor     Agent Co       • Funct Assignments     • Supervisor Accounts       • System Options     • By Agent       • Completion Codes     • Configuration       • Division Definition     • Invision Definition	By Split Skill Levels	plits				
Four Assignments     Supervisor Accounts     System Options     Completion Codes  CD Configuration     Division Definition	By Split Skill Levels					
Supervisor Accounts System Options Completion Codes CD Configuration Division Definition	Split List					
System Options     Completion Codes     Configuration     Division Definition	Split List					
Completion Codes CD Configuration Division Definition	Split List					
CD Configuration	- Default Division					
Division Definition	- Deludit Division					
	Default Group					
<ul> <li>Group Definition</li> </ul>	B Agent 1					
<ul> <li>Split Definition</li> </ul>	E Split 1					
► IVR Assignments	Agent 1 - Priorit	( 1 - Acent Level 6				
Assign Completion Codes	Agent 1 - Phone	y 1 - Agent Level o				
gent Configuration	Agent 3 - Priority	/ 1 - Agent Level 4				
	🗄 Split 2					
Place Only Acest	🖻 Agent 2					
Configuration	🖮 Agent 3					
L Assign Agent Splits	Marketing					
Agent Permissions						
all Routing						
▶ IVR Routing Schedule						
► CLI/DID Routing						
▶ Skill-Based Routing	🔍 Assign Agent	s to Split				
upervisor Control				Save		
▶ Messaging						
▶ Callback List	Agent Name	Split Priority	Skill Level			
▶ Abandoned Call List	Agent 1	1 (Highest) 🗸	Agent Level 6	~		
▶ Completion Code History	Agent 2	0 (Lowest) 🛛 🗸	Level 9 is least (Lowest)	*		
▶ Supervisor Work History	Agent 3	1 (Highest) 🗸	Agent Level 4	~		
ive Monitoring	Agent 6	0 (Lowest) 🗸	Level 9 is least (Lowest)	~		
▶ System Overview						
► Agent Monitoring						

## **Skill Levels**

- 1. Follow the steps in Accessing Assign Agent Splits section.
- 2. Click Skill Levels tab. The Skill Levels page is displayed.
- *3.* The **Skill Level List** page is displayed.
- **4.** In Edit Skill level:
  - Select the Skill level by clicking on the skill level.
- OR
  - Select the skill level from the dropdown list.
  - **Description** Enter description about the skill level.
- 5. Click Save to update the Skill level.

OfficeServ ACD Super	visor	🔯 03:30:58 PM	🕅 LOGOUT
Default Supervisor	📓 Agent Configuration > Assign Agent Splits		
Configuration     Assign Completion Codes  Agent Configuration     Agent Configuration     Phone-Only Agent     Configuration     Agent Configuration     Agent Splits     Agent Splits     Agent Permissions  Call Routing     Sikil-Based Routing     Sikil-Based Routing     Sikil-Based Routing     Messaging     CallBack List     Abandoned Call List	Agent Configuration > Assign Agent Splits           By Agent         By Split         Skill Level s           Skill Level 1 (Highest) - Agent Level 1         Skill Level 2 - Agent Level 2           Skill Level 2 - Agent Level 3         Skill Level 4 - Agent Level 3           Skill Level 5 - Agent Level 4         Skill Level 5 - Agent Level 6           Skill Level 7 - Agent Level 7         Skill Level 9 - Agent Level 8           Skill Level 9 (Lowest) - Level 9 is least         Skill Level 9 (Lowest) - Level 9 is least		
Completion Code History Cupervisor Work History Live Monitoring System Overview Agent Monitoring			
	Sector Sect	al intranet	💐 100% 🔹 💡

#### **Agent Permissions**

The user will be able to configure the Agent Application menu and features permissions for each Agent depending on the security level.

## **Accessing Agent Permissions**

The below section describes how to access the Agent Permissions page.

- *1.* Click **Agent Permissions** on the Supervisor left pane.
- *2.* The **Agent Permissions** page is displayed.

OfficeServ ACD Superv	visor								ť	03:31:3	0 PM	🕅 LOGOL
Default Supervisor	<u>n</u> ) /	Agent Configuration > Agent P	ermissio	ns								
· FUTC Assignments	~											
<ul> <li>Supervisor Accounts</li> </ul>		Agent Feature Modification				Ager	nt Security	Level				
System Options		Permissions	1	2	3	4	5	6	7	8	9	
<ul> <li>Completion Codes</li> </ul>		Auto Answer	Y	Y	Y	Y	Y	Y	Y	Y	Y	
ACD Configuration		Auto Answer Delay	N	N	N	N	N	N	N	N	N	
Division Definition		Wrap-up Auto End	N	N	N	N	N	N	N	N	N	
<ul> <li>Group Definition</li> </ul>		Extend Wran-up	Y	N	N	N	N	N	N	N	N	
Split Definition		No. Answer Action		~	N	N	N	N			N	
<ul> <li>IVR Assignments</li> </ul>		No-Answer Action	1	1	IN	IN	IN	N	IN	IN	IN	
<ul> <li>Assign Completion Codes</li> </ul>		DND	Y	N	N	N	N	N	N	N	N	
Agent Configuration		Split Login	N	N	N	N	N	N	N	N	N	
Agent Configuration		Server Address	N	N	N	N	N	N	N	N	N	
Phone-Only Agent		Login ID	N	N	N	N	N	N	N	N	N	
Configuration		Agent Station	N	N	N	N	N	N	N	N	N	
Assign Agent Splits		Assign Completion Code	N	N	N	N	N	N	N	N	N	
Agent Permissions		Assign Completion Code				N						
Call Routing		Cancel Completion Code	N	N	N	N	N	N	N	N	N	
N/R Routing Schodulo												
CLI/DID Routing												
<ul> <li>Skill-Based Routing</li> </ul>												
Supervisor Control												
<ul> <li>Messaging</li> </ul>												
<ul> <li>Callback List</li> </ul>												
Abandoned Call List												
► Completion Code History												
Supervisor Work History												
Live Monitoring												
System Overview												
<ul> <li>Agent Monitoring</li> </ul>	~											
ne									🛃 Local intran	net	<b>a</b> 10	0% •

#### **Modifying Agent Permissions**

1. Follow the steps in <u>Accessing Agent Permissions</u> section.

2. Click on Y or N to change the permissions. A dropdown list with Yes or No option is



*3.* Select the appropriate permission and the changed permission is highlighed for a few seconds.

**4.** The following permissions can be changed:

- Auto Answer It specifies whether to allow the agent to enable/disable this option.
- Auto Answer Delay It specifies whether to allow the agent to extend ringing time before automatically answering the call.
- Wrap-up Auto-End Specify whether to allow the agent to automatically end the wrapup time, after the Auto end wrap-up time is configured in Supervisor.
- Extend Wrap-Up Specify whether to allow the agent to extend wrap-up time before ending.

- No Answer Action Specify whether to allow the agent to change the status after incoming call is not answered.
- **DND** (**Do-Not-Disturb**) Specify whether to allow the agent to toggle this option or not.
- **Split Login** Specify whether to allow the agent to reassign split priority and login/logout of selected split (Select split Login).
- Server Address Specify whether to allow the agent to change Server IP address.
- Login ID Specify whether to allow the agent to change login ID.
- Agent Station Specify whether to allow the agent to change station number.
- Assign Completion Code Specify whether to allow the agent to assign completion code for ACD inbound call.
- **Cancel Completion Code** Specify whether to allow the agent to cancel completion code for ACD inbound call.

# **CHAPTER 6. Call Routing**

This section describes the features related to call routing.

## **IVR Routing Schedule**

This page allows the user to configure the scheduled IVR routing per IVR service code. If not configured, IVR service routing configured in IVR Assignments page is applied all day long.

#### Accessing IVR Routing Schedule

The below section describes how to access the IVR Routing Schedule page.

- **1.** Click **IVR Routing Schedule** on the Supervisor left pane.
- 2. The IVR Routing Schedule page with IVR Service List page is displayed.
- *3.* The status of IVR Routing Schedule indicates the following:

OfficeServ ACD Superv	sor	🔯 04:44:26 PM	🕅 LOGOUT
Default Supervisor	a Call Routing > IVR Routing Schedule		
System Configuration	IVR Service List		
<ul> <li>Server Connections</li> <li>Port Assignments</li> <li>Supervisor Accounts</li> <li>System Options</li> <li>Completion Codes</li> </ul>	⊞-Service List		
ACD Configuration + Division Definition + Group Definition + Split Definition + IVR Assignments + Assign Completion Codes			
Agent Configuration   Agent Configuration  Phone-Only Agent Configuration  Assign Agent Splits  Agent Permissions	Set IVR Routing		
Call Routing	Usable Save Delete		
IVR Routing Schedule     CLI/DID Routing     Skill-Based Routing  Supervisor Control     Messaging     Callback List     Abandonad Call List	Active For: Always Start Time: 12: 00 AM Go to: Split Default Split Co to: Split Default Split		
		🚽 Local intranet 🛛 🔍	100% 🔹

- 9 Indicates that the IVR Routing Schedule is not in use for the specified date and time.
- Indicates that the IVR Routing Schedule is in use for the specified date and time.

## Set IVR Routing

The [Set IVR Routing] option allows the user to set the IVR Routing Schedule for the selected IVR Service.

- **1.** Follow the steps in **<u>IVR Routing Schedule</u>** section.
- 2. Select a service by clicking on the IVR service name.
- **3.** The Set IVR Routing is displayed.

© Set IVR Routing						
✓ Usable		Save Delete				
Active For:	Always 💌					
Start Time:	12:00 AM 💌	End Time: 12: 00 AM 🗸				
Go to:	Split Default Split					

**4.** Enter the following information:

- Click Usable checkbox to indicate whether the IVR Routing Schedule is in use or not.
- Active For Select this option to indicate when the service is active. It can be one of the following:
  - ➤ Always Selected routing is followed always.
  - Specific Date Selected routing is followed only on the specified date.
  - Date Range Selected routing is followed on the specified date range (Enter Start Date and End Date)
  - Specific day of week (Sunday, Monday etc) Selected routing is followed on the selected day.



#### Priority for Active For

For the selected service, if all the four types of "Active For" is configured, then priority will be in the following order: Specific date (Highest) Date range Specific day of week Always

- Start Time Enter the time for the service to start.
- End Time Enter the time for the service to end.
- Go to Select the split name by clicking on the **Split** button.
- 5. Click Save to save the modified routing information.

#### Modify

The [Edit] option allows the user to modify the selected routing information.

- *1.* Follow the steps in <u>IVR Routing Schedule</u> section.
- 2. Select a Routing Schedule by clicking on the IVR Routing Schedule name.
- *3.* The **Set IVR Routing** is displayed.
- **4.** Enter the required changes.
- 5. Click Save to save the modified routing information.

#### Delete

The [Delete] option allows the user to delete the selected IVR Routing Schedule.

- *1.* Follow the steps in <u>IVR Routing Schedule</u> section.
- *2.* Select a Routing Schedule by clicking on the IVR Routing Schedule name.
- *3.* The **Set IVR Routing** is displayed.
- 4. Click 'Delete' button, a message, "Are you sure to remove Routing?" is displayed.
- 5. Click **OK** to delete the routing information.

### **CLI/DID Routing**

This page allows the user to configure the scheduled CLI or DID routing. For each CLI or DID number, if "Play the Greeting Message" option is checked, the greeting message is played before routing the call to the target split. The IVR/RAD should be configured accordingly with the corresponding message ID (MS00-MS99) in the Split Call control of IVR Scenario Builder. Refer to the IVR User Guide for scenario creation.

#### Accessing CLI/DID Routing

The below section describes how to access the CLI/DID Routing page.

**1.** Click **CLI/DID Routing** on the Supervisor left pane.

- **2.** The CLI/DID Routing page with Routing List page is displayed.
- *3.* The status of CLI/DID Routing Schedule indicates the following:

OfficeServ ACD Supervis	or					🔯 03:35:32 PM	() LOGOUT
Default Supervisor	🚮 Call Rou	uting > CLI/DID F	Routing				
	<b>A B</b>						
Supervisor Accounts	<b>Q</b> R	outing List					
<ul> <li>System Options</li> <li>Completion Codes</li> </ul>	ė.	DID Number Rout	tina				
ACD Configuration		Phone	Date / Day	Time	Greeting	Route Destination	
► Division Definition	_	<b>a</b> 4004	Always	12:00 AM to 12:00 AM	hoodge	2005	
► Group Definition		<u>4004</u>	Aiways	12:00 AM to 12:00 AM		3005	
► Split Definition	÷ (	CLI (Caller ID) N	umber Routing				
<ul> <li>IVR Assignments</li> <li>Assign Completion Codes</li> </ul>		Phone	Date / Day	Time	Greeting Message	Route Destination	
		<u>2003</u>	Always	12:00 AM to 12:00 AM	MS28	Split 1	
<ul> <li>Assign Agent Splits</li> <li>Agent Permissions</li> <li>Call Routing</li> </ul>							
▶ IVR Routing Schedule		G	Set Routing				
► CLI/DID Routing		~	· · · · · · · · · · · · · · · · · ·				
► Skill-Based Routing		<b>V</b>	Usable Route by: CLI No.	*	Save	Delete	
Supervisor Control			Number:				
▶ Messaging			Active for: Always	*			
► Callback List			Start Time: 12:00 A	M 💌 End Tim	e: 12:00	AM 🔽	
► Abandoned Call List			Go to: Other Split	✓ Split			
► Completion Code History			Play the Greeting Message				
► Supervisor Work History		P	Message Number: Message 00	*			
Live Monitoring							
► System Overview							
<ul> <li>Agent Monitoring</li> </ul>							
< >							

- Indicates that the CLI/DID Routing Schedule is not in use.
- <sup>1</sup> Indicates that the CLI/DID Routing Schedule is in use.

## Set Routing

The [Set Routing] option allows the user to set the Routing Schedule for the selected CLI/DID Routings.

- 1. Follow the steps in <u>Accessing CLI/DID Routing</u> section.
- 2. Select a service by clicking on the Routing name.
- **3.** The **Set Routing** is displayed.

Set Routing	]		
☑ Usable Route by	: CLI No.	[	Save Delete
Number:			
Active for:	Always 💌		
Start Time:	12:00 AM 💙	End Time:	12:00 AM 🗸
Go to:	Other Split 💙 Split		
Play the Greeting	Message		
Message Number:	Message 00 🗸		

**4.** Enter the following information:

• Click Usable checkbox to indicate whether the CLI/DID Routing Schedule is in use or not.

• Number — Enter the routing phone number. (Wildcard character '\*' is allowed)



#### Number

Wildcard Character '\*' can be used in phone number. For example, if **Number** is 320\* then all the numbers that start with 320.

- Active For Select this option to indicate when the service is active. It can be one of the following:
  - Always Selected routing is followed always.
  - Specific Date Selected routing is followed only on the specified date.
  - Date Range Selected routing is followed on the specified date range (Enter Start Date and End Date)
  - Specific day of week (Sunday, Monday etc) Selected routing is followed on the selected day.



- Start Time Enter the time for the service to start.
- End Time Enter the time for the service to end.
- **Go to** Select whether the routing is for a Split or Phone number.
  - > If split is selected, then select the split name by clicking on the **Split** button.
  - > If phone number is selected, then enter the agent extension number.
- Select **Play the Greeting Message** to indicate whether to play the message for the call.
- Select the Message Number from the dropdown list.

5. Click Save to save the routing information.

#### Modify

The [Edit] option allows the user to modify the selected routing details.

- *1.* Follow the steps in <u>Accessing CLI/DID Routing</u> section.
- 2. Select a Routing Schedule by clicking on the Routing Schedule name.
- **3.** The Edit Routing is displayed.



**4.** Enter the required changes.

NOTE	Edit Routing Route by and Number cannot be edited.
<b></b>	Route by and Number cannot be edited.

5. Click Save to save the modified routing information.

#### Delete

The [Delete] option allows the user to delete the selected CLI/DID Routing Schedule.

- 1. Follow the steps in <u>Accessing CLI/DID Routing</u> section.
- *2.* Select a Routing Schedule by clicking on the Routing Schedule name.
- *3.* The Edit Routing is displayed with corresponding details of selected Routing Schedule.
- 4. Click 'Delete' button, a message, "Are you sure to remove Routing?" is displayed.
- **5.** Click **OK** to delete the CLI/DID Routing Schedule.

## **Skill-Based Routing**

This page allows the user to configure the skill-based routing per split. For the selected highest and lowest skill levels with search time specified, the server finds the available agent level by level i.e. if Search First is 2, Search Last is 4 and Search Time is 10 sec, then Server finds level 2 agent. If n o level 2 agent is available, then search for level 3 agent after 10 seconds. If no level 3 agent is available, then search for level 4 agent after 10 seconds. If no level 4 agent is available, then search for no level 4 agent is available, then search for level 4 agent after 10 seconds. If no level 4 agent is available, then search for no level 4 agent is available, then search for no level 4 agent.

### Accessing Skill-Based Routing

The below section describes how to access the skill-based Routing page.

**1.** Click **Skill-Based Routing** on the Supervisor left pane.



2. The Skill-Based Routing page with Split List page is displayed.

*3.* The status of Skill-Based routing indicates the following:

- Indicates that the Skill-Based routing is not in use.
- 🔵 Indicates that the Skill-Based routing is in use.

#### Set Skill-Based Routing

The [Skill Based Routing] option allows the user to set Skill-Based Routing for each split.

- 1. Follow the steps in <u>Accessing Skill-Based Routing</u> section.
- *2.* Select a split by clicking on the split name.
- *3.* Select the Skill-Based Routing from the dropdown list.
  - Used option is used to indicate whether Skill-Based Routing is available or not.
  - Search First Select the highest skill level.
  - Search Last Select the lowest skill level.
  - Search Time Enter the time in seconds for the search criteria.
- 4. Select Save to update Skill-Based Routing search.

## Modify

The [Edit] option allows the user to modify the selected Skill-Based Routing.

- 1. Follow the steps in <u>Accessing Skill-Based Routing</u> section.
- 2. Select a split by clicking on the split name.
- 3. The Set Skill-Based Routing is displayed with corresponding details of selected split .
- **4.** Enter the required changes.
- 5. Click Save to save the modified routing information.

#### Delete

The [Delete] option allows the user to delete the selected Skill-Based Routing.

- 1. Follow the steps in <u>Accessing Skill-Based Routing</u> section.
- 2. Select a split by clicking on the split name.
- 3. The Set Skill-Based Routing is displayed with corresponding details of selected split .
- 4. Click 'Delete' button, a message, "Are you sure to remove Routing?" is displayed.
- 5. Click OK to delete the Skill-Based Routing route.

# **CHAPTER 7. Supervisor Control**

This section describes about the Supervisor roles

#### Messaging

The [Messaging] option allows the user to send message to the selected agent.

#### Accessing & Sending Messages

The below section describes how to access the Messaging page.

- *1.* Click **Messaging** on the Supervisor left pane.
- 2. The Messaging page with Split List and Agent List page is displayed.

OfficeServ ACD Superv	isor		10 03:37:59 PM	UDSOUT
🕅 Default Supervisor	Supervisor Control > Messaging			
Supervisor Accounts     Sustem Ontions	Split List	Agent List		
Completion Codes     Completion Codes     ACD Cenfiguration     Division Definition     Oroup Definition     Split Definition     IviR Assignments     Assign Completion Codes     Agent Cenfiguration     Phone-Only Agent     Configuration     Assign Agent Splits     Agent Permissions	Default Division     Default Group     Default Splt     Splt A     Splt B     Splt C     Merketing Division	Agent ID Agent Name	Priority Result 1 0	
IVR Routing Schedule	Message			
<ul> <li>CLI/DID Routing</li> <li>Skill-Based Routing</li> </ul>			×	
Supervisor Control			2	
Nessaging     Callback List     Abendored Call List     Completion Code History     Supervisor Work History     Live Monitoring     System Overview     Agent Monitoring			Send	
	1	91	ocal intranet	\$ 100% ·

- 3. Select the Split by clicking on the tree menu in the order of Division, Group and Split
- **4.** The corresponding agents, logged into the Agent application are displayed are in the **Agent** List section.

5. Select the agent and enter the message to be broadcasted in the Message field.

6. Click Send to send the message to the selected agent.

## **Callback List**

A Callback is where the call is passed to the IVR, to listen to the welcome message and the caller selects the callback option. The [Callback] option allows the user to view the list of callbacks for each spilt.

#### Accessing Callback List

The below section describes how to access the Callback List page.

**1.** Click **Callback List** on the Supervisor left pane.

*2.* The Callback List page is displayed.

OfficeServ ACD Superv	risor					1	0:13:36 AM	🕅 LOGOUT
Default Supervisor	📓 Supervisor Control	> Callback List						
System Configuration  Server Connections  Port Assignments Supervisor Accounts System Options Completion Codes  ACD Configuration  Division Definition Group Definition Split Definition IVR Assignments Assign Completion Codes  Agent Configuration Assign Completion Assign Agent Splits Agent Permissions  Call Routing IVR Routing Schedule CLI/DUR Routing	<ul> <li>Callback List</li> <li>□ Default Division</li> <li>□ Default Spli</li> <li>□ Default Spli</li> <li>□ Assign 6</li> <li>□</li> </ul>	t 27/08/2008 09:48:48 27/08/2008 10:13:20	Phone 7091 7091	Agent 1	Assign Time 27/08/2008 09:49:17	Handle Time	Result Open Open	
Supervisor Control - Messaging - Callback List - Abandoned Call List - Completion Code History - Supervisor Work History Live Monitoring - System Overview - Agent Monitoring	Filter b	y Type: All 💌 r	filter by Date:	08/27/2008 🖏	. 08/27/2008 🖸 Query	Export to Excel		I

## **Assigning Callback List**

- 1. Follow the steps in <u>Accessing Callback List</u>.
- 2. Select the Split by clicking on the tree menu in the order of Division, Group and Split.
- *3.* To assign callback number to the agent,
  - Select the callback number by clicking on the checkbox.
  - The Assign field name is shown. Click Assign, the "Select Agent" page is displayed.

🗿 Select Agent W	eb Page Dialog		×
🥥 Split List			
🖨 <b>Default Divi</b> 🖻 Default Gr 🦾 Default	sion roup Split		
🔍 Agent List	t		
ID ID	Agent Name	Priority	
A0001	Agent 1	1	
A0002	Agent 2	1	
	ОК		

- Select the Agent from the Agent List. Click OK.
- For the selected Callback number, the agent name with assigned date and time stamp is displayed in **Callback List** page.

## **Query on Callback List**

- *1.* Follow the steps in <u>Accessing Callback List</u>.
- 2. Filter by Type Select Filter Type from the dropdown list.
- *3.* Select the **Filter by Date** range by clicking on the calendar.

4. Click Query to view the callback list for the selected period.

5. Click Export to Excel to save the callback list to your hard disk.

## Abandoned Call List

The Abandoned Call is defined as any call which is not answered by the agent or caller himself hangs up without any agent activity. The [Abandoned Call List] option allows the user to view the abandoned call list for each split.

#### Accessing Abandoned Call List

The below section describes how to access the Abandoned Call List page.

**1.** Click **Abandoned Call List** on the Supervisor left pane.

2. The Abandoned Call List page is displayed.

Default Supervisor	🚽 Super	rvisor Control		d Call List					
System Configuration	🔍 Aba	ndoned Ca	all List						
<ul> <li>Server Connections</li> <li>Port Assignments</li> <li>Supervisor Accounts</li> <li>System Options</li> </ul>	⊡ • Defa ⊡ • De ⊡ • De	elault Division efault Group Default Split							
► Completion Codes		💌 <u>Assign</u> 🖗	CLI	DID	Time to Abd	Agent	Assign Time	Handle Time	Result
ACD Configuration		<b>V</b>	7091	5001	27/08/2008 09:42:26				Open
Division Definition			7091	5001	27/08/2008 09:43:26				Open
<ul> <li>Group Definition</li> <li>Solit Definition</li> </ul>		<b>V</b>	7091	5001	27/08/2008 09:44:03				Open
► IVR Assignments		<b>V</b>	7091	5001	27/08/2008 09:58:03	Agent 1	27/08/2008 10:12:23		Open
Assign Completion Codes			7091	5001	27/08/2008 10:09:00	Agent 1	27/08/2008 10:09:56		Open
Agent Configuration  Agent Configuration  Phone-Only Agent Configuration  Assign Agent Splits  Agent Permissions  Call Routing  IVR Routing Schedule  CLI/DID Routing  Skill-Based Routing									
Supervisor Control									
<ul> <li>Messaging</li> <li>Callback List</li> <li>Abandoned Call List</li> <li>Completion Code History</li> </ul>	Fi	ilter by Type: 📝	AII 💌	Filter by Date:	08/27/2008 💽 - 08/	27/2008 🚯 🔍	ery (Abandon Threshold	d: 0 sec) Export to E	Excel
<ul> <li>Supervisor Work History</li> </ul>									
Live Monitoring									
► System Overview ► Agent Monitoring									
	<					Ш			>

#### **Assigning Abandoned Call List**

- 1. Follow the steps in <u>Accessing Abondoned Call List</u>.
- 2. Select the Split by clicking on the tree menu in the order of Division, Group and Split.
- *3.* To assign abandoned number to the agent,
  - Select the abandoned number by clicking on the checkbox.
  - The Assign field name is shown. Click Assign, the "Select Agent" page is displayed.
  - Select the Agent from the Agent List. Click OK.
  - For the selected abandoned number, the agent name with assigned date and time stamp is displayed in **Abandoned Call List** page.

#### **Query on Abandoned Call List**

- 1. Follow the steps in <u>Accessing Abondoned Call List</u>.
- *2.* Filter by Type Select Filter Type from the dropdown list.
- **3.** Select the **Filter by Date** range by clicking on the calendar.
- **4.** Click **Query** to view the Abondoned Call List for the selected period.
- **5.** Click **Export to Excel** to save the Abandoned Call List to your hard disk.

### **Completion Code History**

The [Completion Code History] option allows the user to view the completion code record.

#### **Accessing Completion Code History**

The below section describes how to access the Completion Code History page.

**1.** Click **Completion Code History** on the Supervisor left pane.

#### 2. The Completion Code History page is displayed.

OfficeServ ACD Supe	rvisor 😳 03	:37:59 PM 🕅 LOGOL
Default Supervisor	Supervisor Control > Completion Code History	
Fort Assignments	Du Completine Code	
<ul> <li>Supervisor Accounts</li> </ul>	By Completion Code By Agent	
<ul> <li>System Options</li> </ul>		
<ul> <li>Completion Codes</li> </ul>	Completion Code List	
ACD Configuration		
Division Definition	⊟ aa	
Group Definition	⊡ dd	
Split Definition	No data found	
IVR Assignments		
Assign Completion Codes		
Agent Configuration		
Agent Configuration		
Phone-Only Agent		
Configuration		
Assign Agent Splits		
Agent Permissions		
Call Routing		
IVR Routing Schedule		
CLI/DID Routing		
Skill-Based Routing		
	Filter by Date: 06/09/2008 🐼 - 06/09/2008 🐼 Query	
Supervisor Control		
Messaging		
<ul> <li>Callback List</li> </ul>		
Abandoned Call List		
<ul> <li>Completion Code History</li> </ul>		
<ul> <li>Supervisor Work History</li> </ul>		
Live Monitoring		
System Overview		
Agent Monitoring		
<hr/>		
	Second Intranet	100% •

## **Completion Code History Minor-Codewise**

- **1.** Follow the steps in <u>Completion Code History</u> section.
- *2.* Select the Completion Code by clicking on the tree menu.
- *3.* Select the **Filter by Date** range by clicking on the calendar.
- 4. Click Query to view the selected Completion Code history.

#### **Completion Code History Agent-wise**

- 1. Follow the steps in <u>Completion Code History</u> section.
- 2. Click **By Agent** tab. The **By Agent** page with **Agent List** is displayed.
| OfficeServ ACD Super  | isor  | 🔯 03:37:59 PM | () LOGOUT |
|---|---|---------------|-----------|
| Default Supervisor  | Jupervisor Control > Completion Code History      |               |           |
| <ul> <li>Fort Assignments</li> <li>Supervises Assounts</li> </ul> | By Completion Code By Agent                       |               |           |
| <ul> <li>Supervisor Accounts</li> <li>Suctors Options</li> </ul>  | by completion code by right                       |               |           |
| <ul> <li>Completion Codes</li> </ul>                              | () Agent List                                     |               |           |
| ACD Configuration   | Agent List  |               |           |
| Division Definition   |   |               |           |
| Group Definition  |   |               |           |
| <ul> <li>Split Definition</li> </ul>                              | No data found                                     |               |           |
| IVR Assignments   | <sup>⊡</sup> A2003                                |               |           |
| Assign Completion Codes   | No data found                                     |               |           |
| Agent Configuration   | 🖻 default user                                    |               |           |
| ▶ Agent Configuration   | No data found                                     |               |           |
| Phone-Only Agent  |   |               |           |
| Configuration   |   |               |           |
| Assign Agent Splits   |   |               |           |
| <ul> <li>Agent Permissions</li> </ul>                             |   |               |           |
| Call Routing  |   |               |           |
| IVR Routing Schedule  |   |               |           |
| ► CLI/DID Routing   |   |               |           |
| ▹ Skill-Based Routing   | Filter by Date: 06/09/2008 🖾 - 06/09/2008 🐼 Query | ]             |           |
| Supervisor Control  |   |               |           |
| ► Messaging   |   |               |           |
| <ul> <li>Callback List</li> </ul>                                 |   |               |           |
| ► Abandoned Call List   |   |               |           |
| ▶ Completion Code History   |   |               |           |
| Supervisor Work History   |   |               |           |
| Live Monitoring   |   |               |           |
| System Overview   |   |               |           |
| <ul> <li>Agent Monitoring</li> </ul>                              |   |               |           |
| <>  |   |               |           |
|   | Local ir  | ntranet 🔍     | 100% -    |

- *3.* Select the agent by clicking on the tree menu.
- 4. Select the Filter by Date range by clicking on the calendar.
- 5. Click **Query** to view the selected agent history.

#### **Supervisor Work History**

The [**Supervisor Work History**] option allows the user to view the summary of work of each supervisor.

#### **Accessing Supervisor Work History**

The below section describes how to access the Supervisor Work History page.

- **1.** Click **Supervisor Work History** on the Supervisor left pane.
- 2. The Supervisor Work History with Supervisor List page is displayed.

Behault Supervisor       Supervisor Control > Supervisor Work History         Supervisor Accounts       Supervisor Control > Supervisor List         Supervisor Configuration       Supervisor Definition         > Division Definition       Date       IP Address         > Group Definition       Date       IP Address         > Supervisor Control       O9/06/2008 15:51:22       127.0.0.1       [Remove] Supervisor - Type/Agent ID: c/syed         O9/06/2008 15:50:12       127.0.0.1       [Remove] Supervisor - Type/Agent ID: c/syed       09/06/2008 15:50:12         Agent Configuration       O9/06/2008 15:50:12       127.0.0.1       [Remove] Supervisor - Type/Agent ID: c/syed         > Agent Configuration       O9/06/2008 15:50:28       127.0.0.1       [Remove] Supervisor - Type/Agent ID: c/syed         > Agent Configuration       O9/06/2008 15:50:28       127.0.0.1       [Remove] Supervisor - Type/Agent ID: c/syed         > Agent Configuration       Agent Configuration       O9/06/2008 15:50:28       127.0.0.1       [Remove] Supervisor - Type/Agent ID: c/syed         > Agent Configuration       Suble Based Routing       Supervisor Control       Supervisor Control       Supervisor - Type/Agent ID: c/syed         > Lixe Routing Schedule       Call Routing       Supervisor Work History       Filter by type: All  Filter by Date: 06/09/2008 C - 06/09/2008 C - 06/09/2008 C - 06/09/2008 C - 06/09/2	OfficeServ ACD Superv	visor				🔯 03:37:59 PM	🕅 LOGOUT
Supervisor Accounts     Supervisor Accounts     System Options     Completion Codes     ACD Configuration     Orivisor Definition     Orivisor	Default Supervisor	🚮 Super	rvisor Control > Supervis	or Work History			1
Completion Codes   ACD Configuration            bivision Definition            bivision Codes            Assign Completion Codes            Agent Configuration            bivision Splits            Agent Configuration            bivision Schoule            bivision Schoule <	Fort Assignments     Supervisor Accounts     System Options	0 St	ıpervisor List				
ACD Configuration       Division Definition <ul> <li>Division Definition</li> <li>Group Definition</li> <li>Split Definition</li> <li>Split Definition</li> <li>Split Definition</li> <li>Split Definition</li> <li>Assignments</li> <li>Assign Completion Codes</li> <li>Agent Configuration</li> <li>Phone-Only Agent Configuration</li> <li>Agent Permissions</li> <li>Call Routing</li> <li>Skill-Based Routing</li> <li>Skill-Based Routing</li> <li>Skill-Based Routing</li> <li>Supervisor Control</li> <li>Abasigned Call Litt</li> <li>Completion Code History</li> <li>Supervisor Work History</li> <li>System Overview</li> <li>System Overview</li> <li>Some Supervisor Work History</li> <li>Supervisor Wor</li></ul>	► Completion Codes	Ē Ca	all Center Manager Acco	unts			
<ul> <li>bivision Definition</li> <li>Group Definition</li> <li>Group Definition</li> <li>Group Definition</li> <li>Group Definition</li> <li>Split Definition</li> <li>Split Definition</li> <li>IVR Assignments</li> <li>Agent Configuration</li> <li>Phone-Only Agent</li> <li>Configuration</li> <li>Agent Permissions</li> </ul> Call Boating Supervisor Control Messaging Callback List Assign Completion Code History Supervisor Control Messaging Supervisor Control Messaging Messagi	ACD Configuration		admin				
<ul> <li>Group Definition</li> <li>Split Definition</li> <li>Split Definition</li> <li>NR Assignments</li> <li>Assign Completion Codes</li> <li>Agent Configuration</li> <li>Phone-Only Agent</li> <li>Assign Agent Splits</li> <li>Assign Agent Splits</li> <li>Assign Agent Splits</li> <li>Skill-Based Routing</li> <li>Skill-Based Routing</li> <li>Skill-Based Routing</li> <li>Supervisor Control</li> <li>Messaging</li> <li>Callback List</li> <li>Completion Code History</li> <li>Supervisor Work History</li> <li>Supervisor Work History</li> </ul>	Division Definition		Date	IP Address	Description		
<ul> <li>Split Definition</li> <li>VR Assignments</li> <li>Assign Completion Codes</li> <li>Agent Configuration</li> <li>Agent Configuration</li> <li>Agent Configuration</li> <li>Agent Configuration</li> <li>Agent Configuration</li> <li>Agent Configuration</li> <li>Assign Agent Splits</li> <li>Agent Configuration</li> <li>Assign Agent Splits</li> <li>Assign Agent Splits</li> <li>Assign Agent Splits</li> <li>Agent Configuration</li> <li>Assign Agent Splits</li> <li>Splits Agent Splits</li> <li>Agent Configuration</li> <li>Assign Agent Splits</li> <li>Agent Mouting</li> <li>Skill-Based Routing</li> <li>Call Back List</li> <li>Abandoned Call List</li> <li>Completion Code History</li> <li>Supervisor Work History</li> <li>System Overview</li> <li>System Overview</li> <li>Agent Monitoring</li> <li>System Overview</li> </ul>	<ul> <li>Group Definition</li> </ul>		09/06/2008 15:51:22	127.0.0.1	[Remove] Supervisor - Type/Agent ID: c/syed		
<ul> <li>IVR Assignments</li> <li>Assign Completion Codes</li> <li>Agent Configuration</li> <li>Agent Configuration</li> <li>Agent Configuration</li> <li>Phone-Only Agent Configuration</li> <li>Agent Permissions</li> <li>Call Routing</li> <li>Skill-Based Routing</li> <li>Skill-Based Routing</li> <li>Supervisor Control</li> <li>Kessaging</li> <li>Callback List</li> <li>Abandoned Call List</li> <li>Completion Code History</li> <li>Supervisor Vork History</li> <li>Supervisor Work History</li> <li>System Overwise</li> <li>System Overwise</li> </ul>	<ul> <li>Split Definition</li> </ul>		09/06/2008 15:51:18	127.0.0.1	[Remove] Supervisor - Type/Agent ID: c/syed		
<ul> <li>Assign Completion Codes</li> <li>Agent Configuration</li> <li>Agent Configuration</li> <li>Agent Configuration</li> <li>Agent Configuration</li> <li>Agent Configuration</li> <li>Phone-Only Agent Configuration</li> <li>Assign Agent Splits</li> <li>Agent Permissions</li> </ul> Call Routing IVR Routing Schedule Cull/DID Routing Skill-Based Routing Supervisor Control Messaging Callback List Abandoned Call List Completion Code History Supervisor Work History Supervisor Work History Agent Monitoring System Overview Agent Monitoring Statem Monitoring Statem Monitoring Statem Control Supervisor Work History Supervisor Work History Supervisor Work History Supervisor Work History System Overview Agent Monitoring Statem Control Supervisor Work History Supervisor Work Hi	IVR Assignments		09/06/2008 15:50:52	127.0.0.1	[Remove] Supervisor - Type/Agent ID: c/syed		
Agent Configuration   Agent Configuration   Phone-Only Agent   Configuration   Phone-Only Agent   Configuration   Phone-Only Agent   Configuration   Phone-Only Agent   Configuration   Phone-Only Agent   Configuration   Agent Permissions <b>Call Routing</b> Skill-Based Routing Supervisor Control Messaging Callback List Abandoned Call List Completion Code History Supervisor Work History Supervisor Work History System Overview Agent Monitoring * System Overview Agent Monitoring * System Overview Agent Monitoring * Supervisor Control * System Overview * Agent Monitoring * Supervisor Control * System Overview * Agent Monitoring * Supervisor Control * System Overview * Agent Monitoring * Supervisor Control * Supervisor Work History	<ul> <li>Assign Completion Codes</li> </ul>		09/06/2008 15:50:48	127.0.0.1	[Update] Supervisor - Type/Name/ID: c/saleem/s	syed	
<ul> <li>Agent Configuration</li> <li>Phone-Only Agent Configuration</li> <li>Assign Agent Splits</li> <li>Agent Permissions</li> <li>TVR Routing Schedule</li> <li>CL/DID Routing</li> <li>Skill-Based Routing</li> <li>Callback List</li> <li>Abandoned Call List</li> <li>Completion Code History</li> <li>Supervisor Work History</li> <li>Supervisor Work History</li> <li>System Overview</li> <li>System Overview</li> </ul>	Agent Configuration		09/06/2008 15:50:36	127.0.0.1	[Remove] Supervisor - Type/Agent ID: c/syed		
Phone-Only Agent   Configuration   Assign Agent Splits   Agent Permissions     Call Routing   IVR Routing Schedule   CLI/DID Routing   Supervisor Control   Messaging   Callback List   Adamt Monord Cell List   Supervisor Work History   Supervisor Work History   System Overview	Agent Configuration		09/06/2008 15:50:28	127.0.0.1	[Remove] Supervisor - Type/Agent ID: c/syed		
<ul> <li>Agent refinisions</li> <li>Call Routing</li> <li>IVR Routing Schedule</li> <li>CL/DID Routing</li> <li>Skill-Based Routing</li> <li>Skill-Based Routing</li> <li>Supervisor Control</li> <li>Messaging</li> <li>Callback List</li> <li>Abandoned Call List</li> <li>Completion Code History</li> <li>Supervisor Work History</li> <li>Supervisor Work History</li> <li>System Overview</li> <li>Agent Monitoring</li> <li>Yagent Monitoring</li> </ul>	Phone-Only Agent Configuration Assign Agent Splits		saleem				
<ul> <li>IVR Routing Schedule</li> <li>IVR Routing Schedule</li> <li>CLI/DI Routing</li> <li>Skill-Based Routing</li> </ul> Supervisor Control <ul> <li>Messaging</li> <li>Callback List</li> <li>Abandoned Call List</li> <li>Completion Code History</li> <li>Supervisor Work History</li> <li>Supervisor Work History</li> <li>Supervisor Work History</li> <li>System Overview</li> <li>Agent Monitoring</li> </ul>	Call Pouting						
Supervisor Control   Messaging  Callback List  Abandoned Call List  Completion Code History  Supervisor Work History  Supervisor Work History  Supervisor Work History  Supervisor Work History  Methoditic filter by type: All  Filter by Date: 06/09/2008  Query Export to Except	IVR Routing Schedule     CLI/DID Routing     Skill-Based Routing						
Messaging Callback List  Abandoned Call List  Completion Code History  Supervisor Work History  Supervisor Work History  System Overview  Agent Monitoring  Y and the filter by type: All Y Filter by Date: 06/09/2008 C _ 0	Supervisor Control						
Completion Code History     Supervisor Work History Live Monitoring     System Overview     Added Monitoring	Messaging     Callback List						
Supervisor Work History Live Monitoring System Overview Agent Monitoring	Completion Code History		Filter by type:	All 🔽 Fi	ter by Date: 06/09/2008 🐼 - 06/09/2008 🐼	Query Expo	rt to Excel
Live Monitoring ≻ System Overview Agent Monitoring	<ul> <li>Supervisor Work History</li> </ul>		filler by typer				
► System Overview	Live Monitoring						
Agent Monitoring	System Overview	l r					
	<ul> <li>Agent Monitoring</li> </ul>						
	< >>						

- *3.* Select the Supervisor by clicking on the supervisor name.
- 4. The work details of the selected supervisor is displayed.

## **Query on Supervisor Work History**

- 1. Follow the steps in <u>Accessing Supervisor Work History</u>.
- 2. Filter by Type Select Filter Type from the dropdown list.
- *3.* Select the **Filter by Date** range by clicking on the calendar.
- 4. Click Query to view the Supervisor Work History for the selected period.
- 5. Click Export to Excel to save the Supervisor Work History to your hard disk.

# **CHAPTER 8. Live Monitoring**

This section describes about System Overview and Agent Monitoring.

#### **System Overview**

## Accessing System Overview

The below section describes how to access the System Overview page.

- **1.** Click **System Overview** on the Supervisor left pane.
- **2.** The **System Overview** page is displayed.

OfficeServ ACD Superv	visor		🔯 03:37:59 PM 🛛 🕅 LOGOUT						
Default Supervisor	Live Monitoring > Syst	em Overview							
· FOIL Assignments	Service Level: 5 💌 se	ic .							
<ul> <li>Supervisor Accounts</li> </ul>	Wait Calls	Wait Call by Split	7						
<ul> <li>System Options</li> </ul>	0	5	_						
<ul> <li>Completion Codes</li> </ul>	U								
ACD Configuration									
Division Definition	Ans %								
<ul> <li>Group Definition</li> </ul>	0.0/								
Split Definition	0%								
<ul> <li>IVR Assignments</li> <li>Assign Completion Codes</li> </ul>									
Assign Completion Codes	Svc Lvl	0 0 0 0 0	4						
Agent Configuration	0.0/	Default Split A Split B Split C Marketing Split							
<ul> <li>Agent Configuration</li> </ul>	0%		_ _						
Phone-Only Agent		Ans % and Svc Lvl by Split							
Configuration	Logged-in	100							
Assign Agent Splits	2								
Ageneremissions	2	75							
Call Routing		so Svc Lvi	al						
► IVR Routing Schedule	Longest Wait								
<ul> <li>CLI/DID Routing</li> </ul>		25							
<ul> <li>Skill-Based Routing</li> </ul>	00:00:00								
Supervisor Control		0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0							
▶ Messaging									
<ul> <li>Callback List</li> </ul>		Calls by Split							
<ul> <li>Abandoned Call List</li> </ul>		e construction of opini							
Completion Code History									
<ul> <li>Supervisor work history</li> </ul>									
Live Monitoring									
System Overview									
<ul> <li>Agent Monitoring</li> </ul>									
<u>&lt;</u>									
		Second International Second	ranet 🔍 100% 🔻 🛒						

*3.* Select the **Service Level** from the dropdown list.



SERVICE LEVEL

It is the ratio of answered call in service objective time.

**4.** It shows the graphical view of split calls and following information:

- Wait Calls Indicates the number of wait calls.
- Ans % Indicates the percentage of answered calls.
- Svc Lvl Indicates the percentage of service level for the selected service threshold level.
- Logged-in Indicates the number of logged in agents.
- Longest Wait Indicates the longest call wait time.

#### **Agent Monitoring**

The [Agent Monitoring] option allows the user to view the configured Agents statistics (Idle time, Busy time, Wrap-up time and Break time) and perform following operations

- Forced Login/Logout of the Phone Only Agents.
- Changing the status of the Agent/Phone Only Agent from Idle to Break and releasing the Agent/Phone Only Agent from the Break.

#### **Accessing Agent Monitoring**

The below section describes how to access the Agent Monitoring page.

- *1.* Click **Agent Monitoring** on the Supervisor left pane.
- **2.** The **Agent Monitoring** page is displayed.

OfficeServ ACD Super	rviso	r						🔯 03:37:59 P	M () LOGOUT
Default Supervisor	D	Live Monito	ring > Agent	Monitoring					
Port Assignments	•	Registered	Logged-in	Idle	Busy	Wrap-up	Break		
<ul> <li>Supervisor Accounts</li> </ul>		4	2	2	0	0	0		
<ul> <li>System Options</li> </ul>									
<ul> <li>Completion Codes</li> </ul>		Agent 1	2005	00:00:21	Today´s :	Summary			
ACD Configuration		Agent 2	2009	00:02:32	· · ·				
Division Definition		Agent 3				1			
Group Definition						6			
<ul> <li>Split Definition</li> </ul>		Agent 4	-	-		[			
IVR Assignments						1			
Assign Completion Codes									
Agent Configuration									
Agent Configuration									
Phone-Only Agent									
Configuration					T Tolk	<b>B</b> Idla			
<ul> <li>Assign Agent Splits</li> </ul>					Breal	k Wrap-up			
<ul> <li>Agent Permissions</li> </ul>									
6 H.B. 11	E				Idle	e 00:00:00			
Call Routing					Busy	00:00:00			
<ul> <li>IVR Routing Schedule</li> </ul>					Wrap-up	00:00:00			
<ul> <li>CLI/DID Routing</li> </ul>					Break	< 00:00:00			
<ul> <li>Skill-Based Routing</li> </ul>									
Supervisor Control					Change S	tatus			
<ul> <li>Messaging</li> </ul>					📀 Set Break	(			
<ul> <li>Callback List</li> </ul>					Personal	Break 😽			
Abandoned Call List					🔘 Release E	Break			
Completion Code History						Go			
Supervisor Work History					E				
cape. then work instary									
Live Monitoring									
System Overview									
<ul> <li>Agent Monitoring</li> </ul>	~								
	-							🔍 Local intranet	🕄 100% 🔻

*3.* It shows the details about the Agent on current day.

4. Select the Agent and the summary of the Agent is displayed in graphically.

5. The Supervisor can change the status of the selected Agent in Change Status.

#### **Monitoring Phone Only Agent**

- *1.* Follow the steps in <u>Accessing Agent Monitoring</u>.
- *2.* Select Phone Only Agent by clicking icon *or* Agent's name.



*3.* Summary of the Agent is displayed graphically.

*4.* Supervisor can do the following operations:

• Force Login if the agent is not logged.

OR

- Force Logout the Agent, if the Agent is logged in
- Set the Agent status Idle to any of Break Types configured.

OR

• Releasing the Break status of the Agent.

#### **Monitoring Agent**

- *1.* Follow the steps in <u>Accessing Agent Monitoring</u>.
- *2.* Select Agent by clicking Agent's name.



*3.* Summary of the Agent is displayed graphically.

*4.* Supervisor can do the following operations:

• Set the Agent status Idle to Break Types configured.

OR

• Releasing the break status of the Agent.



#### AGENT STATUS

When Agent is busy., status cann't be changed.

## **ABBREVIATION**

Α		
	ACD	Automatic Call Distribution
C	ASP	Active Server Pages
C	СТІ	Computer Telephony Integration
	СОТ	Central Office Trunks
	CLI	Calling Line Identification
D		
	DB DID	Database Dialed Number Identification
	DSN	Data Source Name
	DTMF	Dual Tone Multi Frequency
I		
	IP IVR	Internet Protocol
	IIS	Internet Information Server
Η		
N. <b>A</b>	HTTP	Hyper Text Transport Protocol
IVI	1440	
0	MINC	Man Machine Code
Ŭ	ODBC	Open Database Connectivity
Ρ		
_	PBX	Private Branch Exchange
R		
c	RAD	Recorded Announcement Device
3	SOL	Structured Query Language
Т	OQL	
-	TCP	Transmission Control Protocol
U		
	UMS	Unified Messaging System
V	URL	Uniform Resource Locator
V	VoIP	Voice over IP

#### OfficeServ ACD Supervisor User's Guide

© 2008 Samsung Electronics Co., Ltd. All rights reserved.

Information in this document is proprietary to SAMSUNG Electronics Co., Ltd.

No information contained here may be copied, translated, transcribed or duplicated by any form without the prior written consent of SAMSUNG.

