Forum™ 700

Call Center - Supervisor Application

User Manual

The CE mark indicates that this product conforms to the following Council Directives:
- 89/336/CEE (concerning electro-magnetic compatibility)
- 73/23/CEE (concerning electrical safety)
- 1999/5/CE (R&TTE)

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Table of contents

Call Center - Supervisor Application

Chapter 1
General overview

Chapter 2
Agent supervision

Chapter 3
Call and group supervision

Chapter 4
Line observation

Chapter 5
Display customization

Chapter

1   *General overview*

1.1   Presentation of the Supervisor application

The Supervisor application allows you to view real-time information on the activity of the Call Center and to simultaneously change parameters, the status and assignment of agents, groups and ACD (Automatic Call Distribution) calls.

You therefore have real-time access to information such as the number and status of the agents connected, the number of calls waiting, of calls deterred or lost, and the status and composition of groups.

Functions

The Supervisor application can be used to perform the following operations:

Observe Call Center activity

The Supervisor application provides a tool which can be used to immediately check the status of your team. In real-time you can:

- Observe agent parameters.
- Observe the status of agents assigned to telephones: free, on a break, post-processing or busy.
- Observe agent activity.
- Observe agent activity rates (displayed as a graph).
- Observe call distribution (number of calls waiting, received, processed, abandoned, deterred, number of transactions conducted).
- Observe line status (ACD ports).

Manage Call Center activity

You can also intervene to:

- Change agent status by placing them on duty, off duty, on clerical work or temporary absence.
- Change status of a group by opening or closing it.
- Assign agents to groups.
- Change the priority of agents in groups.

Customize the display of the Call Center observation windows

You can:

- Customize the Call Distribution screen.
- Customize the agent activity rate graph.

Note:
The supervisor can also act as an agent. However, the Supervisor application cannot under any circumstances replace the Agent application.

1.1.1   Connecting and disconnecting

Chapter	**1**	*General overview*

1.1.1.1   Connecting to the Supervisor application

Procedure

1. On the desktop, click the **Supervisor Console** icon.
The connection properties window appears.
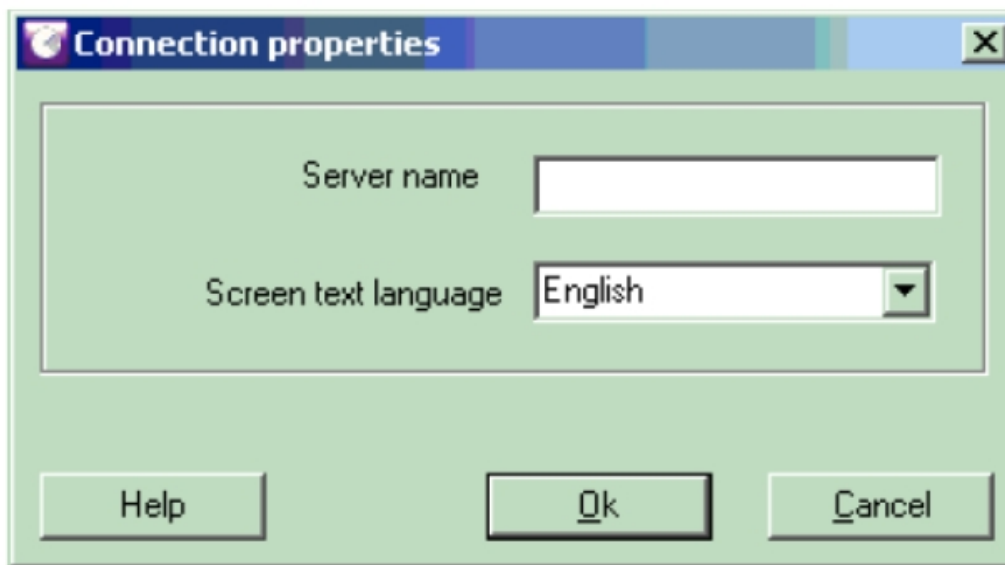
2. In the **Server Name** field, enter the server name or IP address.

3. From the **Screen text language** drop down menu, select the language in which the screens will be displayed.

4. Confirm by clicking **OK**.
The supervision window is displayed and you are now connected.
You can now supervise the activity of the Call Center.

1.1.1.2   Disconnecting from the Supervisor application

Procedure

Click on ☒ in the upper right-hand corner of the window to close the application window.

You are now disconnected from the Supervisor application.

1.1.2   The Supervisor application interface

1.1.2.1   Presentation of the interface

The Supervisor application contains three types of screen:

- A screen for observing agents or groups.

- A screen for customizing how the observation windows are displayed.

- A screen for observing line status (ACD ports).

1.1.2.2   *Agent or group observation screen*

This screen provides real-time information on agent sets, on groups and agent activity rates (screen refreshing every second).

It has the following areas:

- upper area
- Agent Activity Rate area
- Call Distribution area

Upper area

The upper area provides general information on agents in the form of a table, such as their number, their set number and their name, plus real-time information (the groups they belong to, order of priority in groups, activity rate, agent status, connection of the Agent application).
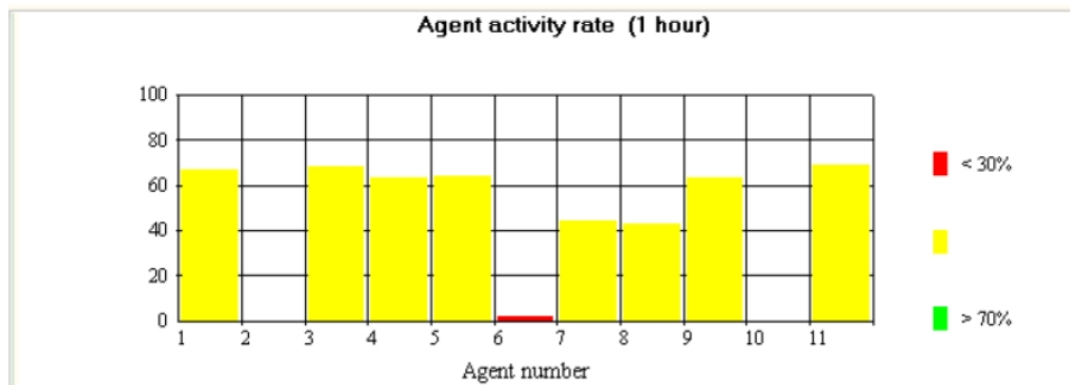

From this table, you can:

- Consult agent parameters
- Observe agent status in real-time

You can also perform the following tasks as required:

- Change the status of one or more agents
- Assign agents to groups
- Change the priority of agents in groups

Agent Activity Rate area

This area displays the agent activity rate as a customizable bar chart or graph:

Agent activity rate (1 hour)

From this table, you can:

- Observe agent activity rates

  Note 1:
  This screen can be customized.

Call Distribution area

This area shows the distribution of ACD calls to ACD groups in the form of a table:

- The columns represent the groups selected in the display parameters.
- The rows represent the call and group parameters.

Observation of group activity

Agent n°.	Station	Name	Group	Rank	Rate		Status	PC
1	134	Acd 1	1	01	90 %		A.C.D. busy	
2	168	ACD 2	1	02	0 %		Ringing	
3	166	ACD 3	1	03	94 %		A.C.D. busy	
4	169	ACD 4	1	04	49 %		Not available	
5	169	ACD 5	1	05	43 %		A.C.D. busy	
6	171	ACD 6	1	06	96 %		A.C.D. busy	
7	172	ACD 7	1	07	53 %		A.C.D. busy	
8	172	ACD 8	1	08	52 %		Not available	
9	170	ACD 9	1	09	95 %		A.C.D. busy	
10	167	ACD 10	1	10	0 %		Awaiting call	
11	165	ACD11	1	11	94 %		A.C.D. busy	

From this table, you can:

- Observe call distribution (real-time traffic).
- Change group status if necessary.

Note 2:
To switch from the Agent screen to the Group screen, click the corresponding button at the bottom of the observation screen.

Note 3:
For more information, see sections Observe call distribution and Group parameters.

1.1.2.3 Customization screen

Click the **Parameters** button. The customization screen appears.

This screen allows you to customize how the observation windows are displayed.

It has the following areas:

- area for selecting agents and groups

- area for displaying the agents and groups selected

- area for displaying the parameters of the agent activity rate

Area for selecting agents and groups

This area is used to select the agents or groups which will be displayed in the observation windows.

- **Agent**: used to choose the selection mode for agents and groups.
  • **By group**: used to select agents by group.
  • **Specific**: used to select agents on an agent-by-agent basis.
- **Group**: used to select the groups to be displayed in the group observation screen.

Area for displaying the agents and groups selected

This area shows a list of the selected agents to be displayed in the observation screens, and a list of all the agents, if the Specific option is selected in the agent and group selection area.

**Area for display parameters of the agent activity rate**

This area is used to customize the **agent activity rate** graph.

- **Threshold**: used to change the view thresholds of the T1 and T2 activity thresholds in the graph.
  - **Display**: used to display or hide the view thresholds.
  - **T1 =**: used to enter a T1 view threshold.
  - **T2 =**: used to enter a T2 view threshold.
- **With lines**: used to change the gridlines of the graph:
  - **None**: displays the graph without gridlines.
  - **Vertical**: displays the graph with vertical gridlines.
  - **Horizontal**: displays the graph with horizontal gridlines.
  - **Both**: displays the graph with vertical and horizontal gridlines.

1.1.2.4   *Line status observation screen*

This screen provides real-time information on the status of lines (with screen refreshing every second).
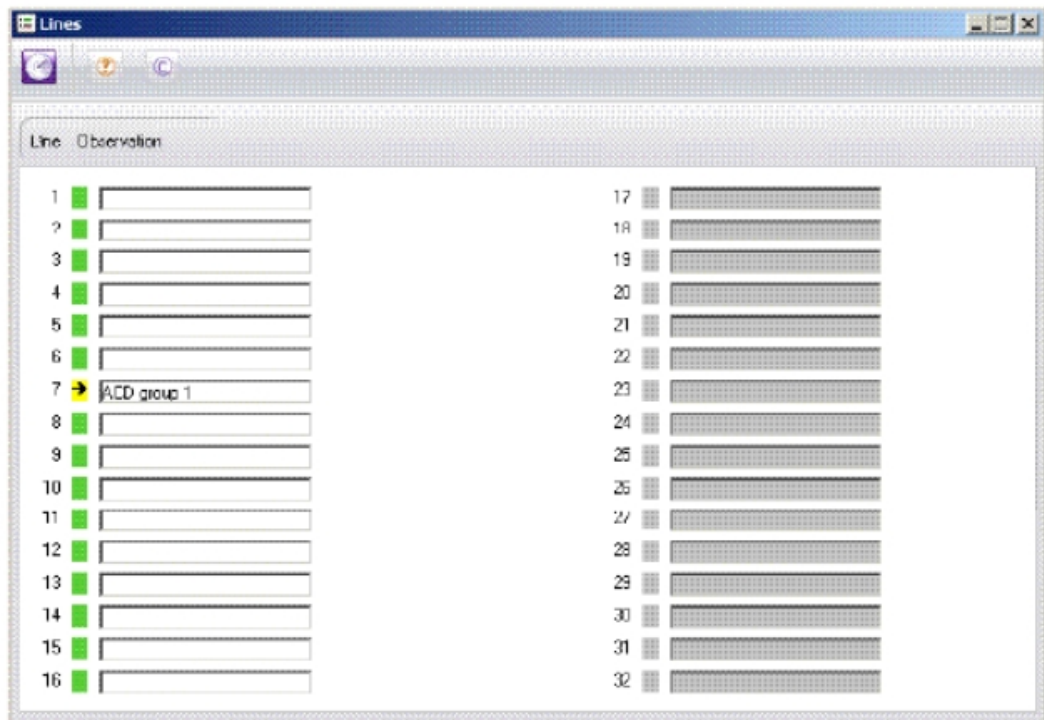
To switch from the line status observation screen to the agent or group observation screen, click the **Lines** or **Supervisor Console** button at the bottom of the observation screen.

Note:

For more information, see Line observation section.

Chapter   **1**   *General overview*

Chapter

2   *Agent supervision*

2.1   Agent parameters

2.1.1   Observe agent parameters

Access

From the agent or group observation screen, access the upper area listing agent parameters.

Presentation

Agent parameters are displayed in the form of a table:

- **N^o** : shows the agent's identity number.
- **Number**: shows the directory number of the agent's set.
- **Name**: shows the agent's name.
- **Groups**: shows the group or groups the agent belongs to.
- **Rank**: shows the priority rank of the agent in each of his groups.
- **Rate**: shows the agent's activity rate.
- **Status**: shows the agent's operating status.
- **PC**: shows the connection status of the Agent application. If the agent is connected to the Agent application (from a PC), the corresponding box is coloured green.
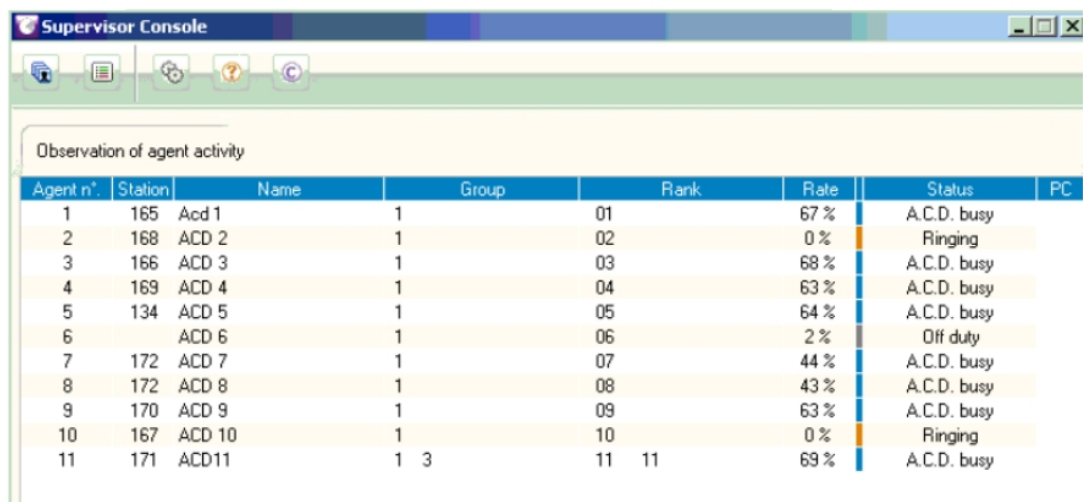
2.1.2   Observe agent status

Access

From the agent or group observation screen, access the upper area listing agent parameters. The status of agents is displayed in the next to last column of the table.

Presentation

The **Status** column displays the status of each agent's set in real-time.

The set status can have the following values:

- **On duty**
  The agent is at his set. A set which is in service can have several different status values, depending on the agent's activity.

- **Temporary Absence**
  The agent has temporarily gone off duty, for example, for a break.

- **Clerical Work**
  Following an ACD conversation, the agent may, for example, need to assess the call (fill out a customer information screen etc); he temporarily withdraws from the call distribution chain.

- **Off Duty**
  The agent has withdrawn from all ACD groups or the agent has no associated terminal.

  Note:
  An agent observed as off duty on an isolated basis can very easily have an activity rate of 80% for the hour currently being observed.

2.1.3   **Change agent status**

The Supervisor application allows you to change the status of agents in real-time, as required. For example, if lots of calls suddenly arrive, you can change the status of agents so that they remain on duty and take calls.

Access

From the agent or group display screen, access the upper area listing agent parameters.

Procedure

1. In the **Status** column of the table, click the cell corresponding to the agent whose parameters you want to change.
The **Parameters of agent n^o X** window appears.

2. From the **Status** drop-down list, select the status that you want to assign to the agent: **Off duty**, **On duty**, **Clerical work**, **Temporary absence**.

3. Click **Apply** to confirm the data, then **OK** to close the window.
   The changes are taken into account by the system and the new parameters of the agent are shown in the table.

2.2 Agent activity

2.2.1 Observe agent activity

You can observe the real-time activity of agents selected for display in the observation windows, and know, for example, whether an agent has incoming calls, whether he is in conversation, has taken a break or is unavailable.

Access

From the agent or group observation screen, access the upper area listing agent parameters. Agent activity can be observed in the **Status** column, the next to last column of the table.

Presentation

When in service, the status of an agent's set can have one of the following values:

- **Awaiting Call**
  The agent assigned to an ACD group is likely to answer the next ACD call.

- **No Answer**
  A call has been sent to an agent who does not answer.
  Two scenarios are possible:
  - If the option **Agents That Do Not Answer Are Automatically Removed** has been activated, the agent is taken off duty.

- If the option **Agents That Do Not Answer Are Automatically Removed** has not been activated, the agent stays off duty for the time period defined in the field **Duration of an Agent's Temporary Removal After Failure To Answer** before being switched back to **Awaiting Call** status.

  Note 1:
  The option Agents That Do Not Answer Are Automatically Removed and the field Duration of an Agent's Temporary Removal After Failure To Answer are configured by the system administrator.

- **Being Routed**
  The agent's set is reserved for a call currently being transferred to it (the set is not yet ringing).

- **Ringing**
  The agent's set rings after transfer of the ACD call.

- **ACD Busy**
  The agent is holding an ACD conversation.

- **Idle**
  The agent has just hung up after an ACD call. He is then given an idle period before another call is sent.

  Note 2:
  The idle period is configured by the system administrator.

- **Not Available**
  The agent's set is busy with non-ACD calls.

- **Faulty**
  The agent's set is temporarily not being managed by the ACD.

- **Busy, Outgoing Call**
  The agent's set is off the hook without any dialing taking place or the agent is making a non-ACD call.

2.2.2   Observe agent activity rates

Access

From the agent status supervision window, access the **Agent Activity Rate** area.

Presentation

The agent activity rate is represented as a graph.
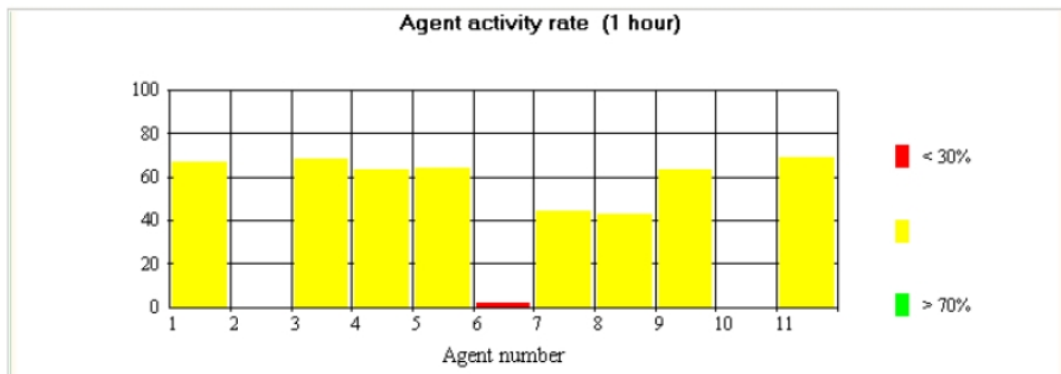
For each agent, the agent activity rate corresponds to the ratio between the time spent on ACD calls in the selected time slot and the period of time used to calculate activity rates (1 hour or 1/2 hour).

The data displayed on agent activity rates can be changed by customizing the **Agent Activity Rate** graph.

Note:

Agent activity rates are also displayed as a percentage in the Rate column of the agent observation table

in the upper area of the window.

Chapter **2** *Agent supervision*

Chapter

3   *Call and group supervision*

3.1   Group parameters

3.1.1   Assign agents to groups

The Supervisor application allows you to change the content of groups by moving an agent from one group to another, depending on the call load in the queue, the duration of calls or the workload observed.

Access

Access the upper area listing agent parameters using the agent or group display screen.

Procedure

1. In the **Status** column of the table, click the cell corresponding to the agent whose parameters you want to change.
   The **Parameters of agent n^o X** window appears.

2. In the **Groups** field, check or uncheck the boxes corresponding to the groups to which you want the selected agent to be assigned.

3. Click **Apply** to confirm you choices, then **OK** to close the window.
   The changes are taken into account by the system and the agent's new parameters are shown in the table.

3.1.2   Change the priority of agents in groups

Access

From the agent or group observation screen, access the upper area listing agent parameters.

Procedure

1. In the **Status** column of the table, click the cell corresponding to the agent whose parameters you want to change.
The **Parameters of agent n° X** window appears.

2. In the **Rank** field, below each group, enter a figure that corresponds to the rank that the agent should hold in that group.

Note:
The rank of the agent can be specified, even for groups that he is not currently assigned to.

3. Click **Apply** to confirm the data, then **OK** to close the window.
The changes are taken into account by the system and the new parameters of the agent are shown in the table.

3.2 Call distribution

3.2.1 Observe call distribution

Access

From the agent or group observation screen, access the **Call Distribution** area.

Presentation

The **Call Distribution** area lists the following elements in a table:

- Group parameters

- Call parameters

   Note:
   For more information, see Call Distribution area in section Agent or group observation screen.

3.2.2   Group parameters

Presentation

Group parameters can take the following values:

- **Group Status:**
  The ability to force a group status to OPEN or CLOSED is indicated on the observation screens by the letter M for Manual. To view these status values, click on the **Group Status** field, and select the group required.
  The group status values are:
  • OPEN (M): group forced open.
  • CLOSED (M): group forced closed.
  • OPEN: group open (depending on time slot or contact).
  • CLOSED: group closed (depending on time slot or contact).

     Note 1:
     For more information, see section Agent or group observation screen.

- **Saturated Group**: there are too many calls and the group is overloaded.
  A given group is shown as overloaded as follows:
  • Group x Saturated (orange): no agents are free in the group, the next call will be placed in the queue.
  • Group x Saturated (red): the time elapsed since the group was saturated is longer than the value **Time Delay With Flashing of Overload Messages** defined by the system administrator.

- **Calls in Queue**: there is at least one call in the queue.

- **Calls Deterred**: at least one call has been deterred.

Note 2:
All the percentages in the table are calculated in relation to calls coming into the ACD.

3.2.3   Call parameters

Presentation

Call parameters can have the following values:

- **Calls Answered:**
  Number of ACD calls transferred to an agent, and resulting in a conversation being started (even if the conversation time is 0 seconds), regardless of the group (called or through overflow).

- **Calls Being Routed:**
  Number of calls being connected to an agent, but not yet put through.

- **Waiting Time < Overflow Time:**
  Number of calls waiting for a period of time less than the **Overflow Time**, where the

Overflow Time represents the overflow time delay defined for each ACD group by the system administrator.

Note 1:
An agent is searched for only in the group requested.

- **Waiting Time > Overflow Time:**
Number of calls waiting for a period of time greater than the **Overflow Time**.

Note 2:
An agent is searched for in the group requested and possibly in the overflow group if the latter is entered.

- **In Queue >S1:**
If the parameter **Waiting Begins Before Overflow Time Delay** is checked:
  - **In Queue >S1**: Number of calls where the waiting time is longer than **S1**, where **S1** is a threshold defined by the system administrator, allowing the determination of service quality criteria.
    In this case, counting of the queue time for the statistics starts as soon as the call enters the queue.

  If the parameter **Waiting Begins Before Overflow Time Delay** is not checked:
  - **In Queue >S1**: Number of calls waiting for a period of time greater than (**S1 + OverflowTime**).
    In this case, counting of the queue time for the statistics starts on termination of the overflow time delay, and the wait before this threshold is ignored.

- **In Queue >S2:**
If the parameter **Waiting Begins Before Overflow Time Delay** is checked:
  - **In Queue >S2**: Number of calls where the waiting time is longer than **S2**, where **S2** is a threshold defined by the system administrator, allowing the determination of service quality criteria.

  If the parameter **Waiting Begins Before Overflow Time Delay** is not checked:
  - **In Queue >S2**: Number of calls waiting for a period of time greater than (**S2 + OverflowTime**).

    Note 3:
    The option Waiting Begins Before Overflow Time Delay is configured by the system administrator.

- **Calls Deterred:**
Number of calls routed to the dissuasion announcement following saturation of the queue, or if no agent is defined in a given group.

- **Calls Service Closed:**
Number of calls taking place while the group is closed.

3.2.4 Change group status

Access

From the agent or group display screen, access the **Call Distribution** area.

Procedure

1. In the table, click in the column corresponding to the group that you want to change.
The window **Status of group n^o X** is displayed.
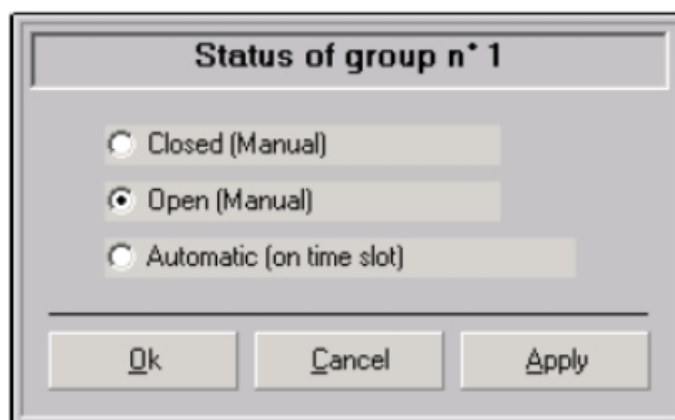
2. Select one of the following status values:
   - **Open** (Manual): group forced open
   - **Closed** (Manual): group forced closed
   - **Automatic** (On Time Slot): group open in accordance with time slots
3. Click **Apply** to confirm the data, then **OK** to close the window. The status of the group is changed in real-time.

Chapter   **3**   *Call and group supervision*

Chapter

4 *Line observation*

4.1   Observe line status

The **Supervisor** application allows supervisors to access real-time information on lines (ACD ports) so that maintenance can be carried out.

Access

To access the observation screen, click **Lines**.

Note:

For more information, see section Line status observation screen.

Presentation

This screen shows the activity of the server lines in real-time (with screen refreshing every second).

The screen shows:

-   The line number, between 1 and 14.

-   The line status. It is indicated by a coloured square to the right of the line number. The lines can have one of the following four status values:
    -   **free**: represented by a green square.
    -   **incoming call**: represented by a yellow square with a **>** sign.
    -   **outgoing call**: represented by a yellow square with a **<** sign.
    -   **fault**: represented by a red square.

-   The application used by the lines in real-time, in the case of ACD calls.

Chapter **4** *Line observation*

Chapter

5 *Display customization*

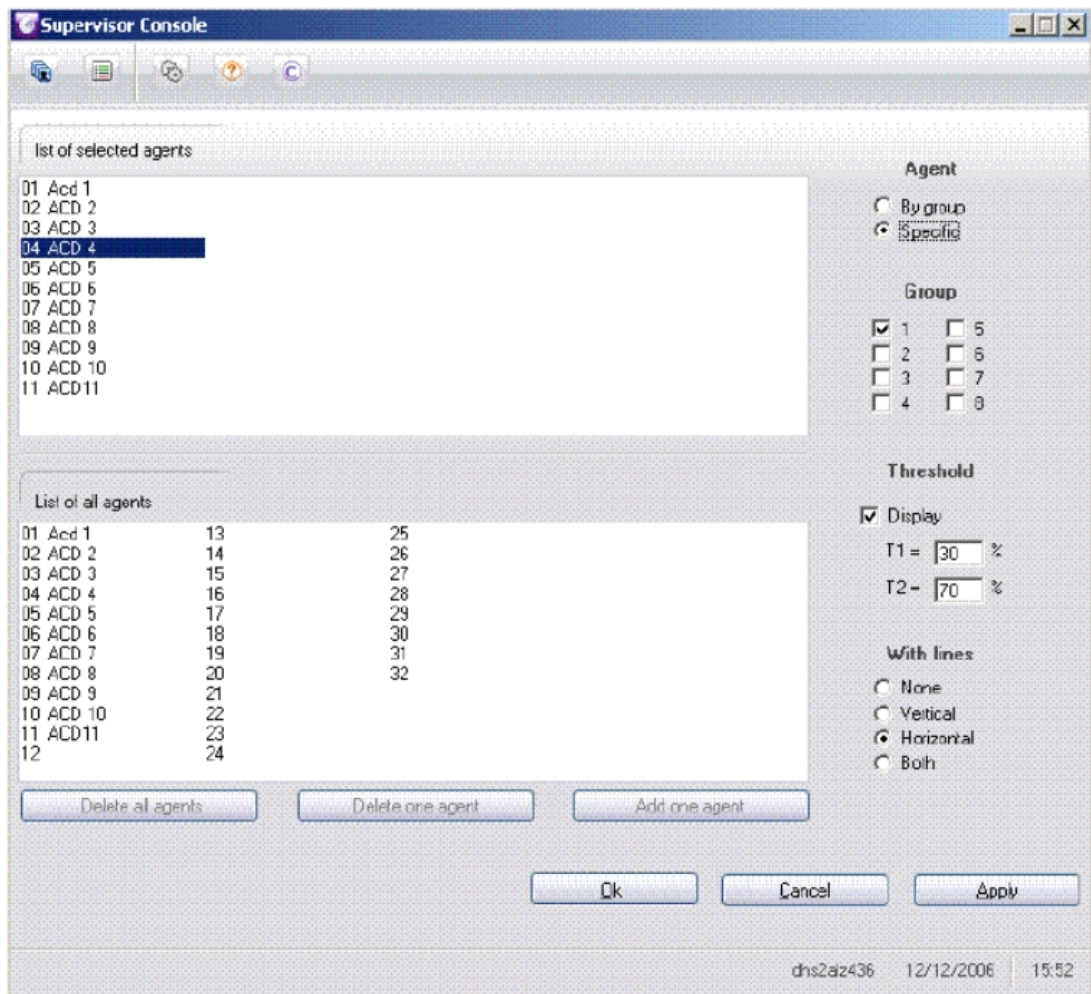## 5.1 Customize the Call Distribution screen

Access

Click the **Parameters** button. The customization screen appears.

Procedure

You can customize the **Call Distribution** screen:

- either by selecting agents by group (agent area, **By Group** option).
- or by selecting agents on an agent-by-agent basis, regardless of the group they are assigned to (agent area, **Specific** option).

5.2 Select agents by group

Procedure

In the customization screen of the **Supervisor Console**:

1. Select the **By Group** option in the **Agent** area, then select the groups that you want to observe by checking the relevant box or boxes in the **Group** area.

2. Click **Apply**.
    The agents belonging to the group selected are displayed in the **List of Selected Agents** area.

3. Click **OK** to confirm the data and close the customization window.
    The observation screen of the **Supervision Console** is displayed. The table displays data according to the customization parameters defined.

5.3 Select agents on an agent-by-agent basis

Agents are selected on an agent-by-agent basis, regardless of the group they belong to.

Procedure

In the customization screen of the **Supervisor Console**:

1. Select the **Specific** option in the **Agent** area.
    All configured agents are displayed in the **List of All Agents** area, in the lower part of the window.

    • To add an agent:
      Select the agents you want to appear in the observation window in the **List of All Agents** area, then click the **Add Agent** button, or double-click on the agent in the **List of All Agents** area.
      The agent is displayed in the **List of Selected Agents** area.

      Note:
      Each agent must be selected individually.

    • To delete an agent:
      Select the relevant agent from the **List of Selected Agents** area, then click the **Delete Agent** button. You can also double-click on the agent in the **List of Selected Agents** area.
      The agent disappears from the **List of Selected Agents** area.

    • To delete all agents:
      Click the **Delete All Agents** button. All agents disappear from the **List of Selected Agents** area.

2. Click **OK** to confirm the data and close the customization window.
    The observation window of the **Supervisor Console** is displayed. The table shows how it has been customized.

5.4 Customize the agent activity rate graph

Customization of the **agent activity rate** graph consists of:

-   Changing the view percentage of T1 and T2 activity thresholds.

-   Changing the gridlines of the graph.

Access

Click the **Parameters** button. The customization window appears.

Procedure

- In the **Threshold** area:

  1. Check the **View** box to display T1 and T2 thresholds on the activity rate graph.

  2. In the fields **T1 = and T2 =**, enter the required value. T1 and T2 indicate quality of service, allowing rapid analysis of activity rates.

     Note:
     T1 and T2 can be used to change the view thresholds of the agent activity rate.

- In the **Gridlines** area:

  1. Select the type of gridline required by checking the boxes **None**, **Vertical**, **Horizontal** or **Both**.

  2. Click **OK** to confirm the data and close the customization window.

  The observation window of the supervision console is displayed. The graph is displayed with the new customization.

Chapter **5** *Display customization*