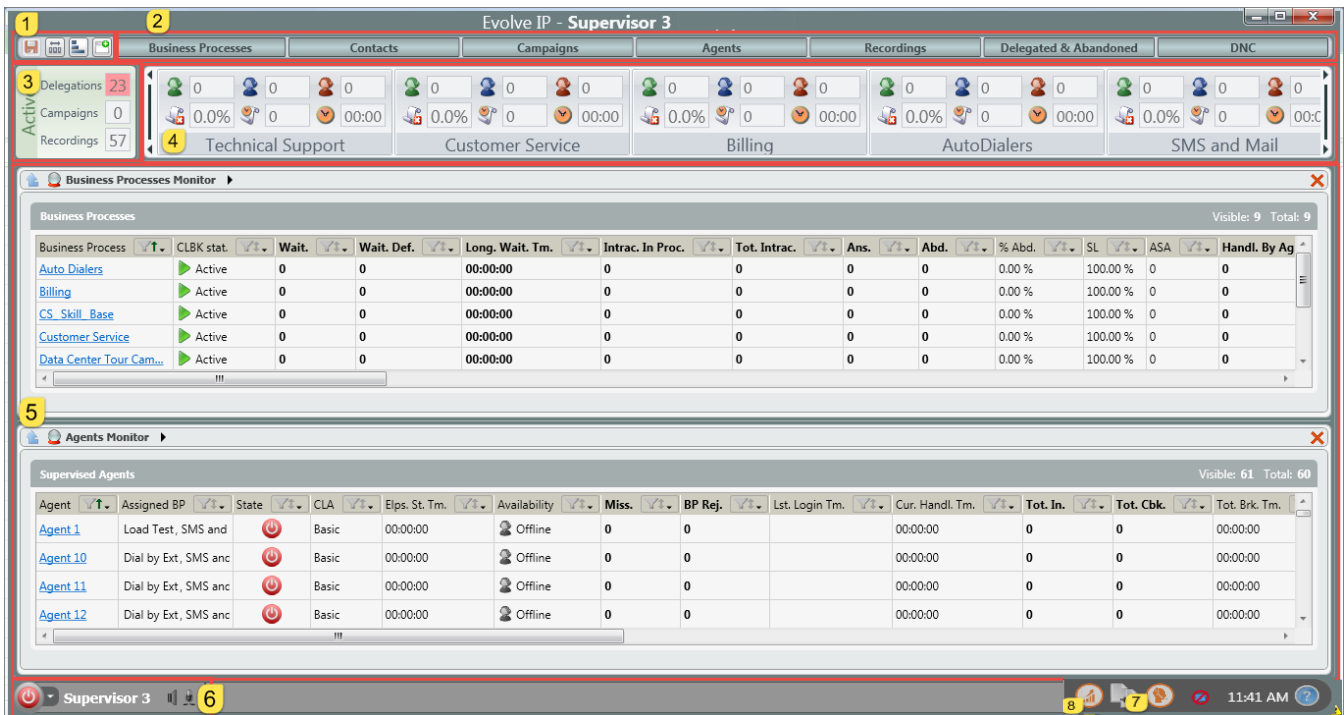


# ECS Supervisor Client






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## Quick Reference Guide

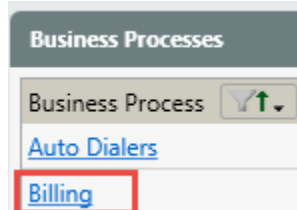
## ECS Supervisor Client: Interface



The Supervisor Client has six separate sections: Quick Access bar, Index Bar, Active Box, Business Process Dashboard, Work Area Window, and Supervisor Agent AppBar.

1. **Quick Access bar** - Manage the display of the Dashboard, Index's and Save any changes made within the Supervisor Client.
  - a.  - Indicates no changes have been made and need to be saved
  -  - Indicates changes have been made and need to be saved (ex. Changes were made to a Campaign Scheduling parameter and must be saved to take effect)
  - b.  - Arrange the order of the Business Processes on the Dashboard
  - c.  - Expand or Collapse the Business Processes on the Dashboard – When expanded Supervisors are able to see results of the campaigns being run within each BP, i.e how many calls reached voicemail, no answer, busy etc.
  - d.  - Open Individual Index's into a new window – If the Supervisor has dual monitors they can focus on the Business Processes and Agent Index on separate monitors. Click this button then click on Business Process or Agents. Click the button again to turn off this feature.
2. **Index Bar** - All available Index's to view and monitor within the Work Area Window.
3. **Active Box** - Provides Supervisors a quick glance at Delegations, Campaigns, and Recordings currently active within all of the Business Processes they are responsible for.
4. **Business Process Dashboard** - Real time view of the current state of each Business Process. This is scrollable left and right to see all Business Processes. Hover over a specific Business Process for a quick view or click to drill into a specific Business Process Monitor.

5. **Work Area** – Business Processes and all other Index options can be viewed, monitored, and drilled into via the Work Area. Selecting an Index will open a new view within the Work Area, dynamically changing the size of each Index view as more are selected.
  - a. To drill down, select the individual agent name, business process, campaign etc. found in each index.



6. **Supervisor Agent AppBar** – Provides Supervisors the capability of interacting with Agents, contact center personnel and/or customers. This has the same usage and functionality as the Agent Client.
7. **Agent Business Process and Campaign Assignment** – Provides Supervisors the ability to assign inactive agents to a business process or campaign for a set period of time.
8. **Reporting** – Access to the Report Scheduler

## First Time Setup

1. **Business Process Verification** – Select the Business Process Index to open within the Work Area. Verify all Business Processes you are monitoring are listed. Click the name of a Business Process to drill into current performance.
2. **Agent Verification** - Select the Agent Index to open within the Work Area. Verify all Agents you are Supervising are listed. Open this a second or third time to focus on teams of Agents.
3. **Test Call** – Place a test call / email / webchat into a Queue. Verify:
  - a. The BP Dashboard shows an interaction is waiting.
  - b. The interaction is delivered to an agent .
  - c. Dashboard updates to show an Answered interaction when the agent releases the call.

## Supervisor Client Setup

Supervisors should choose which KPIs to view for each Index within the Work Area Window, sort records in a different order (e.g. ascending and descending – numerically and alphabetically) or filter the records that match certain criteria.

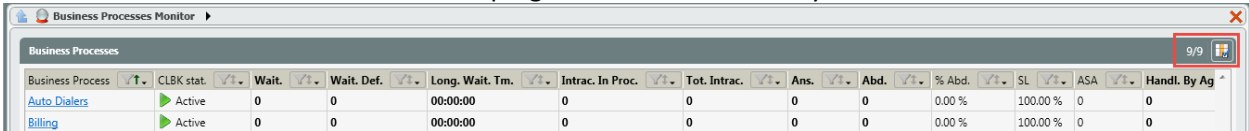
The following KPI's are most critical:

1. Service Level
2. Calls Abandoned/% Abandoned
3. Calls Queued
4. Average Handle Time
5. Average Wait Time

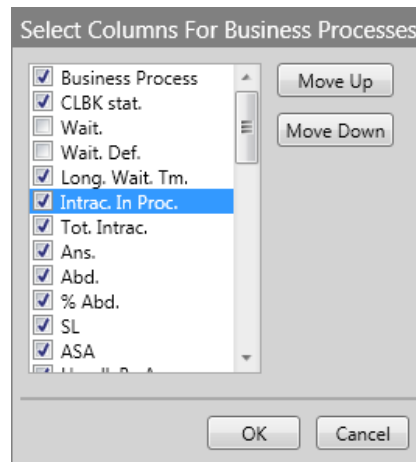
# ECS Supervisor Client: Quick Reference Guide

**Column Selector:** allows for the arrangement of columns (Key Performance Indicators) in whichever order is preferable.

1. The Column Selector is in the top right hand corner of every Index view.



2. When selected, a popup window will appear with the current columns selected. Uncheck the columns to remove a specific column from view and use the Move Up/Move Down options to reorder the columns. Select OK to save.



## Agent Monitoring

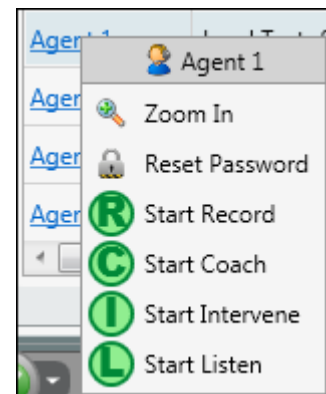
Supervisors may perform certain quality assurance, training and monitoring activities that can be executed on any of the agents. Right-click an agent's name in the Work Area to see the shortcut menu displaying the different commands:

**Coach:** Use to view, hear and coach all interactions without alerting the customer. You might use this command to assist when training new agents.

**Intervene:** Use to join in the interaction with the agent and customer. You might use this command to assist agents with a complicated or problematic call.




**Listen:** Use to silent monitor an agent and hear or view all the interactions. You might use this command for quality monitoring and future training purposes.

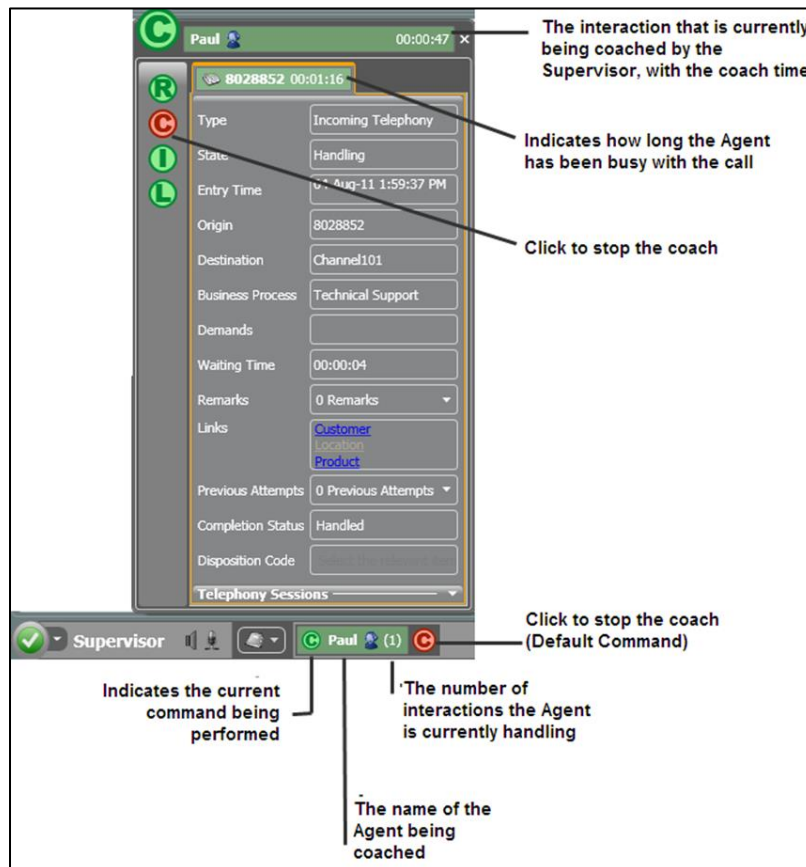
**Coach:** Use to view, hear and coach all interactions without alerting the customer.



1. Right-click the agent you want to 'Coach' in the Work Area. A pop-up menu displays all the available commands.




# ECS Supervisor Client: Quick Reference Guide

2. Click  Start Coach . An interaction window opens on the Supervisor's Agent AppBar indicating that Coach is in progress and the agent may be coached/trained. The Coach command icon changes to .
3. Right-click the agent's name in the Work Area and click  to stop coaching. The Coach function is terminated and the interaction window closes.

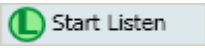



*\*The above image is applicable for all Agent Monitoring interactions (Coach, Intervene and Listen)*


**Intervene:** Use to join in the interaction with the agent and customer.


1. To Intervene on an Agents call, right-click on their name in the Work Area. A pop-up menu displays all the available activities.
2. Click  Start Intervene . An interaction window opens on the Supervisor's Agent AppBar indicating that the Intervene command is now in progress and you are now part of the interaction.  
The Intervene command icon changes to  on the Supervisor's Agents AppBar.
3. Click  to stop the Intervene command. The Intervene command is terminated and the interaction window disappears from the Supervisor's Agent AppBar.

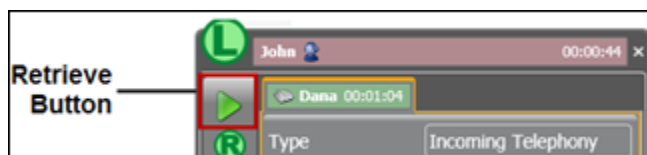
**Listen:** Use to silent monitor an agent and hear or view all the interactions.

1. Choose which agent you want to 'Listen' to and right-click on their name in the Monitoring View area. A pop-up menu displays all the available options.
2. Click . An interaction window opens on the Supervisor's Agents AppBar indicating that the Listen command is now in progress and you are able to hear the interaction.

The Listen command icon changes to .

3. Click  to stop listening. The Listen command is terminated and the interaction window disappears from the Supervisor's Agent AppBar.

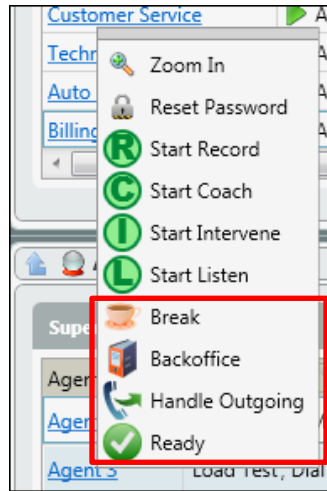
**Note\*** The retrieve command is used ( 'Retrieve' button  ) in cases where the supervisor is performing either a coach, listen or intervene and another interaction (voice, chat or mail) is received while performing one of the commands. After accepting the new interaction, the supervisor's interaction panel is put on hold and in order to get it back, the 'Retrieve' button must be used.



## Change an Agent's ACD State

Supervisors can change an agent's ACD state when the agent is logged in and online. If an agent appears offline in the Agent Index, their ACD state cannot be changed.

To change an agent's ACD state right click on their name. A pop up menu will appear with all available ACD's states. Select the new ACD state.

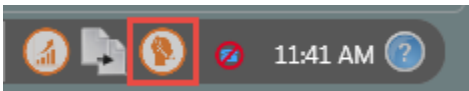


## Assign Agent to Business Processes and Campaigns

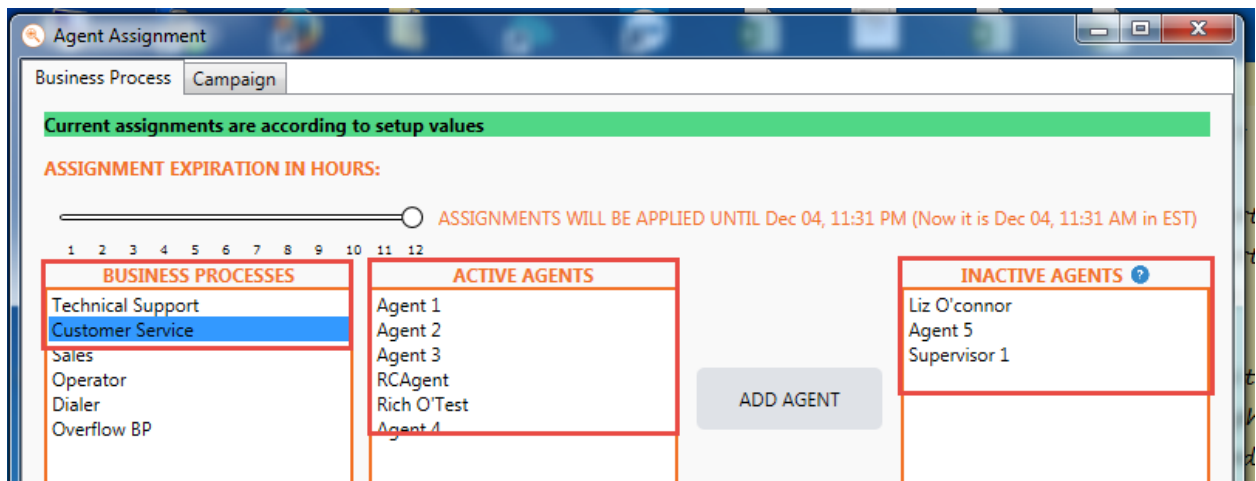
Within the Supervisor client you have the ability to temporarily assign agents to Business Processes and Campaigns. The assignment is for a set period of time (a few hours, a day, week etc). Once the period of time has ended the agent will be removed from the Business Process assignment.

### Assign Agents to Business Processes:

1. Select the Assign Agents to Business Processes and Campaigns Icon at the bottom of the Supervisor Client

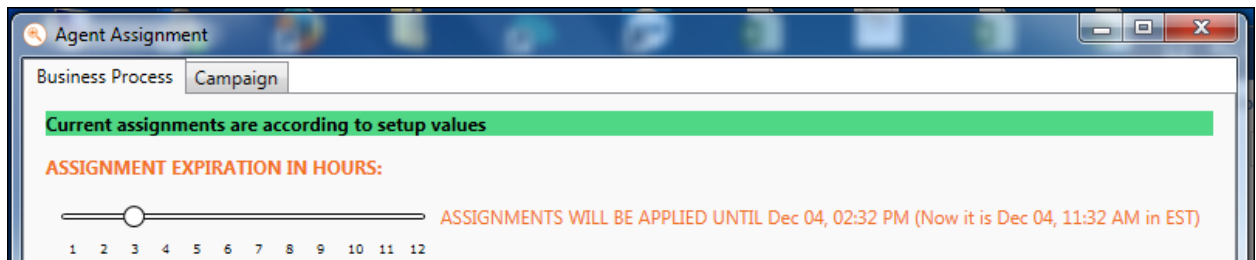


2. Within the Agent Assignment to Business popup window select a Business Process. Once selected, the agents that are currently active and inactive within the BP will appear.



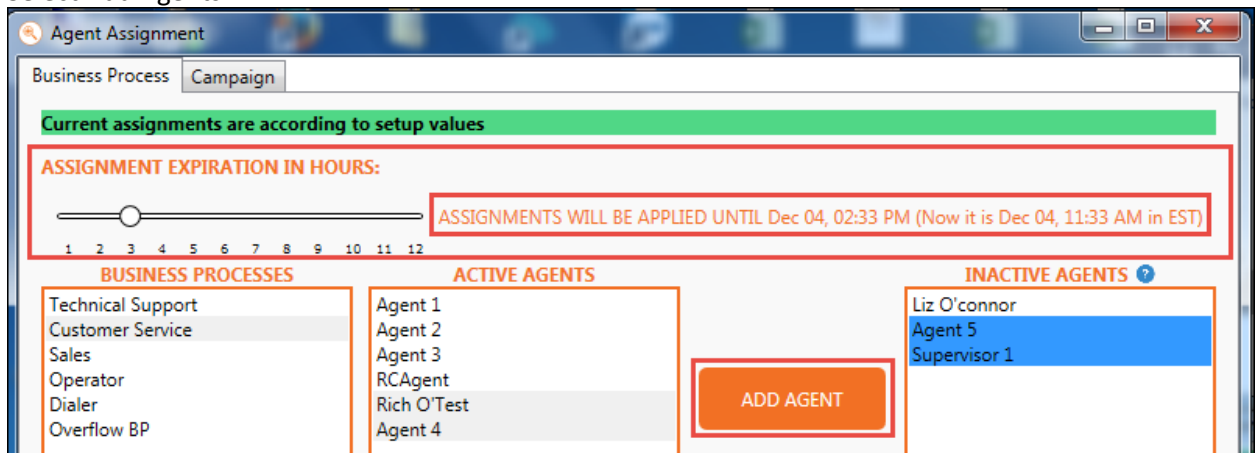
3. Assignment Expiration Hours allows you to select the total number of hours you wish the selected agents to be assigned and active within the Business Process.

# ECS Supervisor Client: Quick Reference Guide



For example, if you wish for your agents to be active within a BP for 2 hours, select 2. Once you have added agents and saved your changes, the agents will be active and able to handle any interaction within the selected BP for two hours. Once the time has run out, they will be moved back into an inactive status and will no longer receive interactions from the selected Business Process.

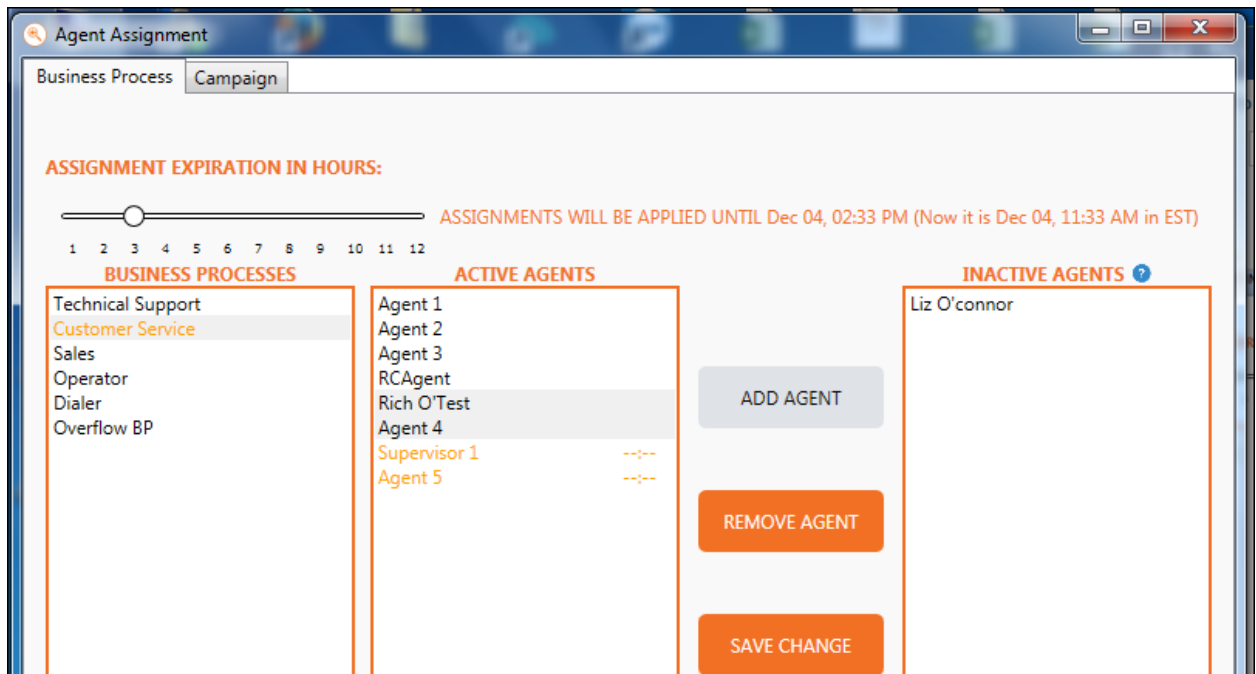
4. Select the Agents to be added to the Business Process.
5. Set the correct Assignment Expiration in Hours.
6. Select Add Agents



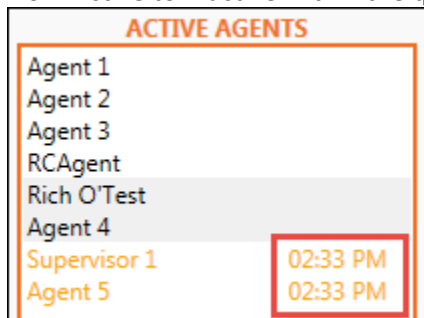
7. Once the agents have been added, select Save Changes.



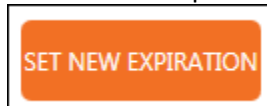
# ECS Supervisor Client: Quick Reference Guide



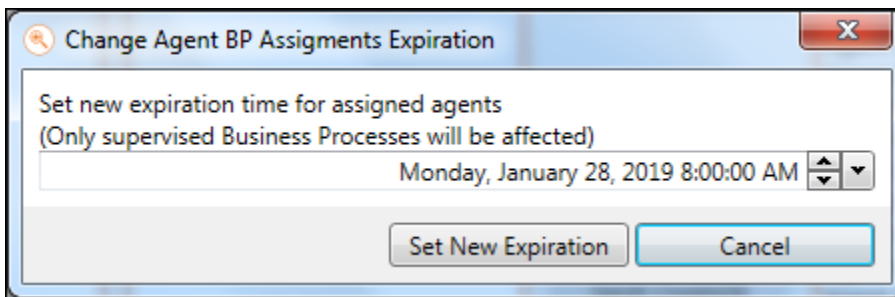
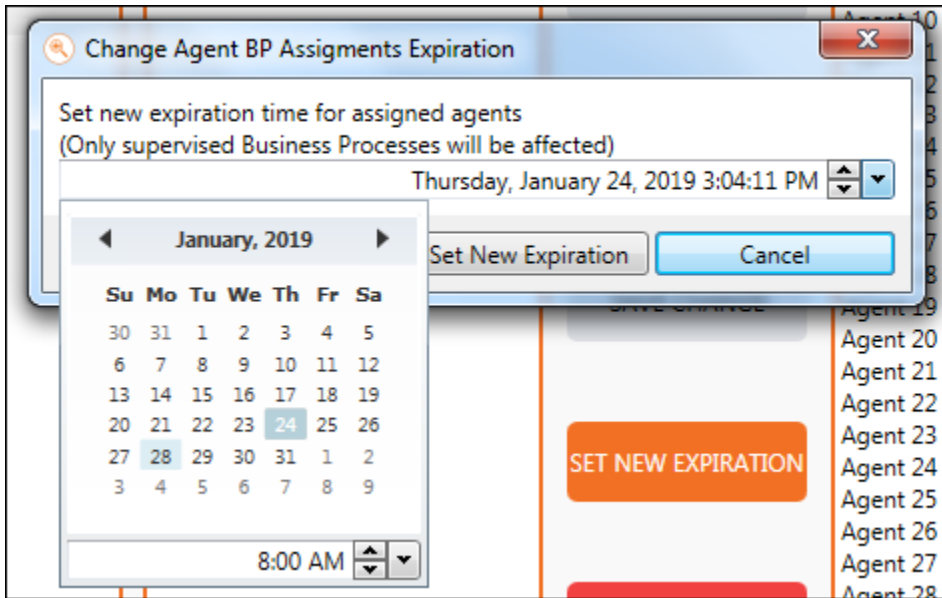
- When the changes have been changed, you will see the time in which the agents will be moved from Active to Inactive within the queue, based on the expiration hours set.



- To reset the agents back, select the **Reset**
- To set a new expiration by the Hour, Day, Week, or Month, select **Set New Expiration**



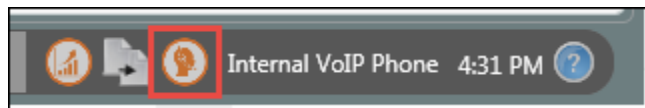
- Select the day and time of the new expiration. In this example, the change is being made on January 24<sup>th</sup> and the agent expiration is being set for Monday, January 28<sup>th</sup> at 8am.



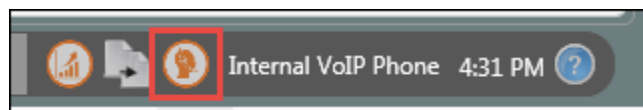
12. Select Set New Expiration
13. The Agent time will reflect the new expiration set.

## Assign Agents to Campaign:

The Assign Agent to Business Process and Campaigns Icon allows Supervisor to manage the agents assigned to receive calls from each Campaign. The list of agents available is pulled from the Business Process the Campaign is assigned.

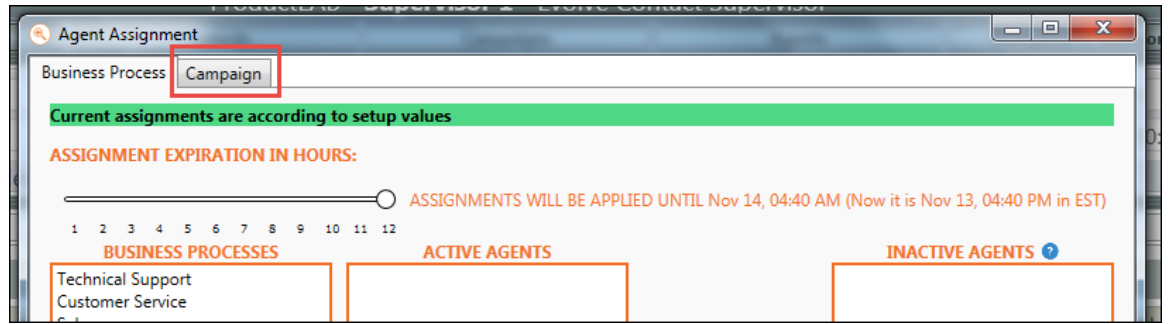


1. Select the Assign Agents Icon at the bottom of the Supervisor Client

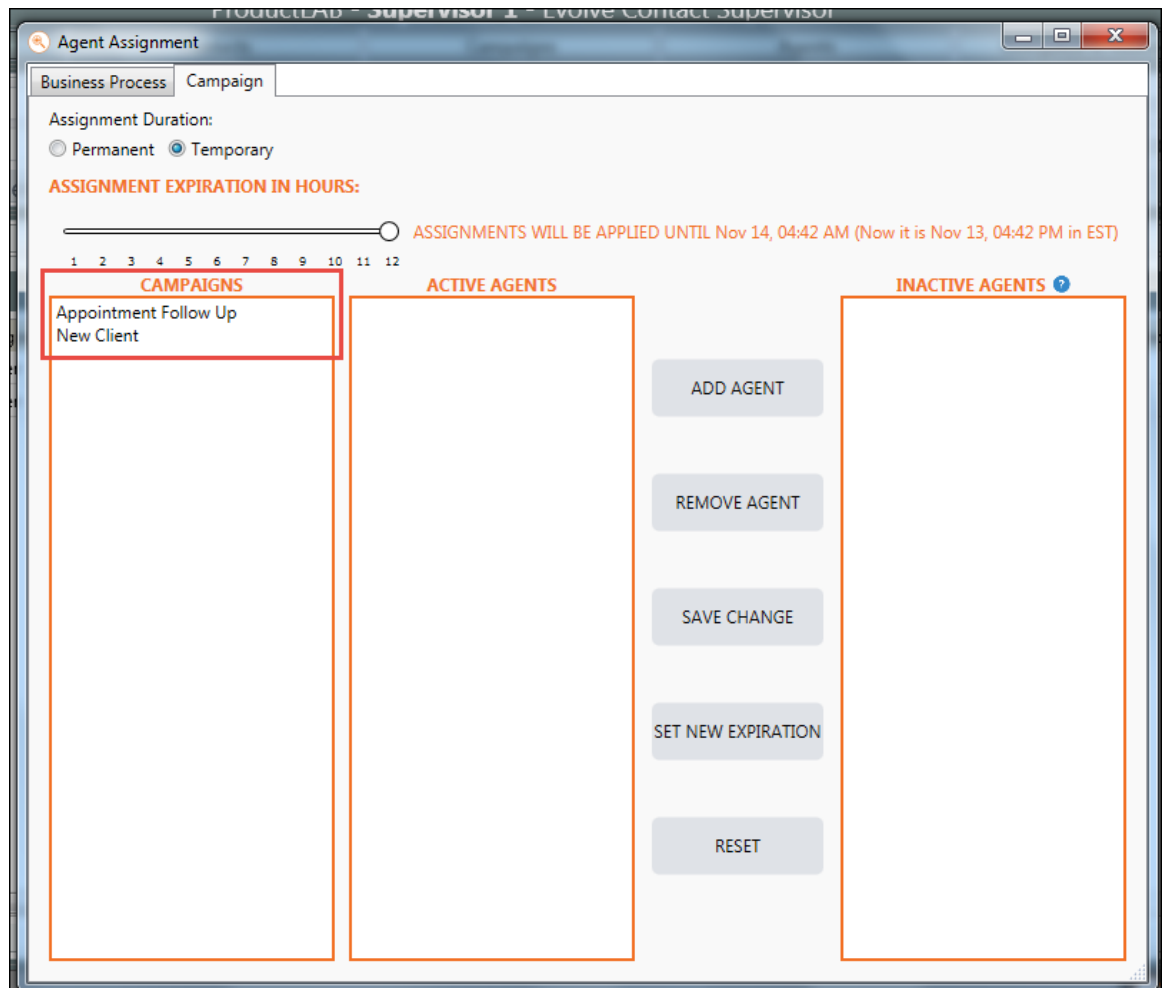


2. Select the Campaign Tab

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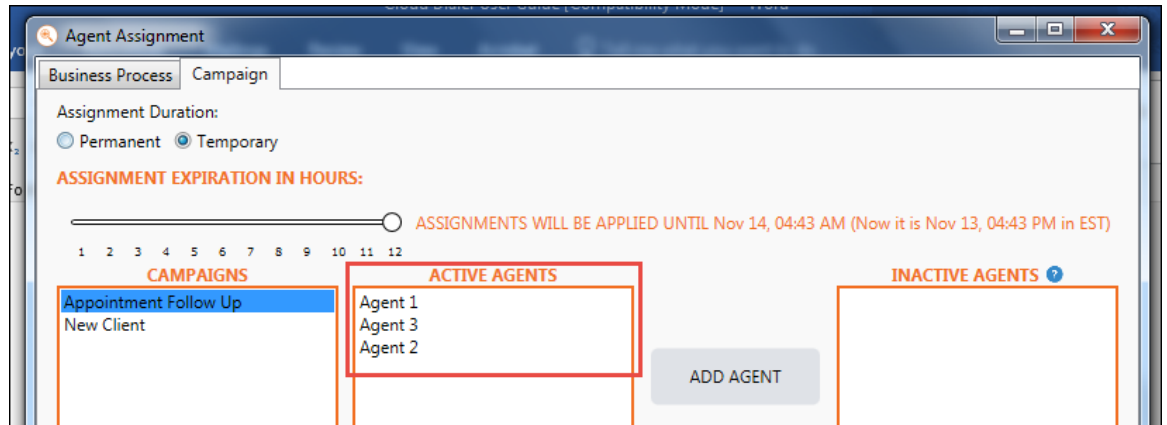


3. This will provide you with a list of all currently created campaigns within the Supervisor client.

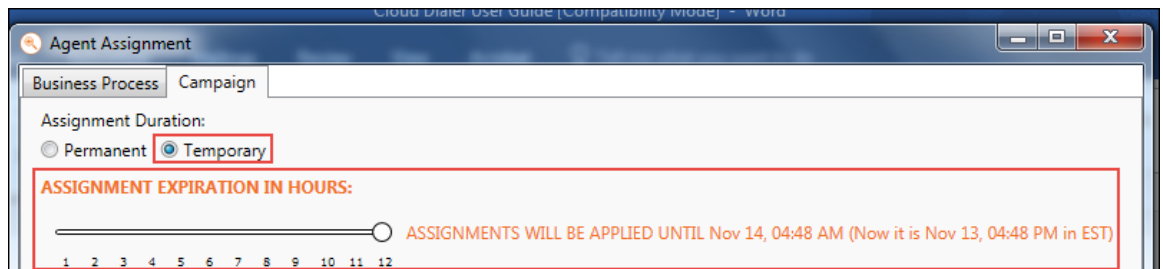


4. Clicking on a campaign will provide you with a list of agents that are currently active and available to take calls from that campaign.

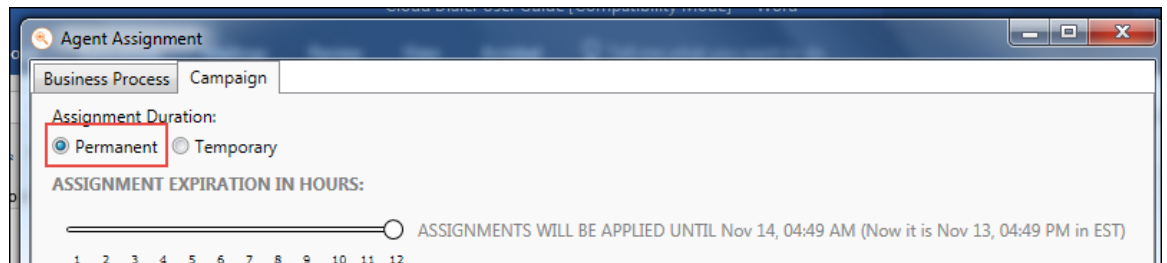
# ECS Supervisor Client: Quick Reference Guide



5. Within the active/inactive agents column there are two options to manage the agents:
  - a. **Temporary Assignment Duration** – temporarily removes the agent from the campaign assignment. Set a time assignment expiration so the agent will automatically be placed back into the campaign as an active agent when the time limit expires.

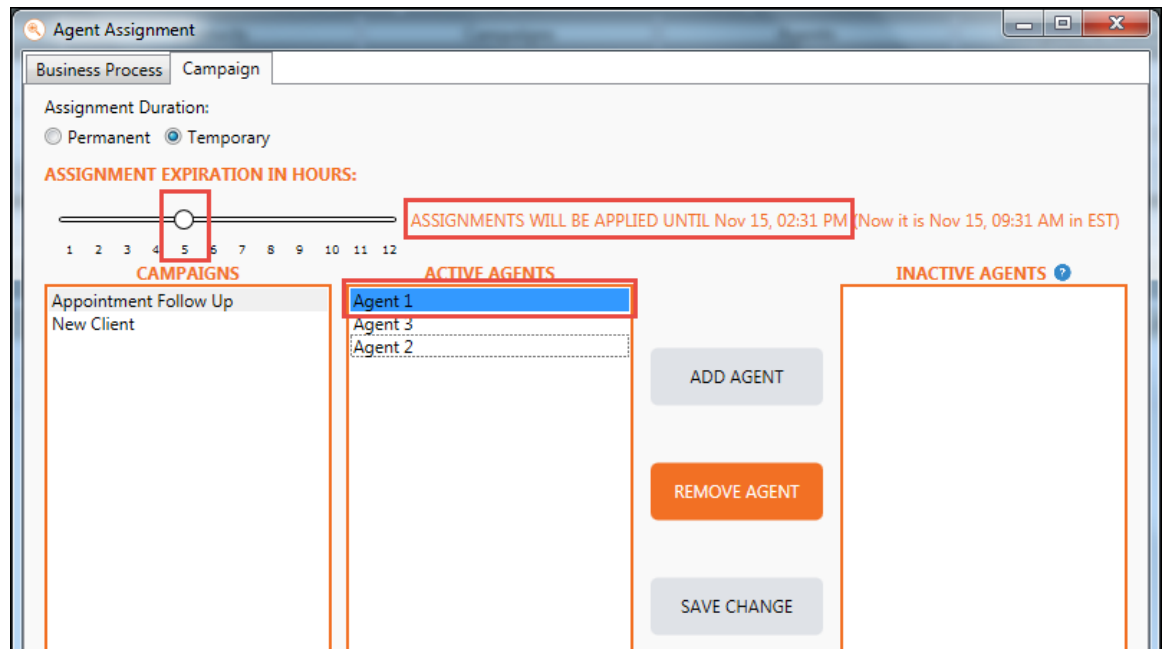


- b. **Permanent Assignment Duration** – permanently removes the agent from the campaign until the agent is manually placed back into the active agent's column.

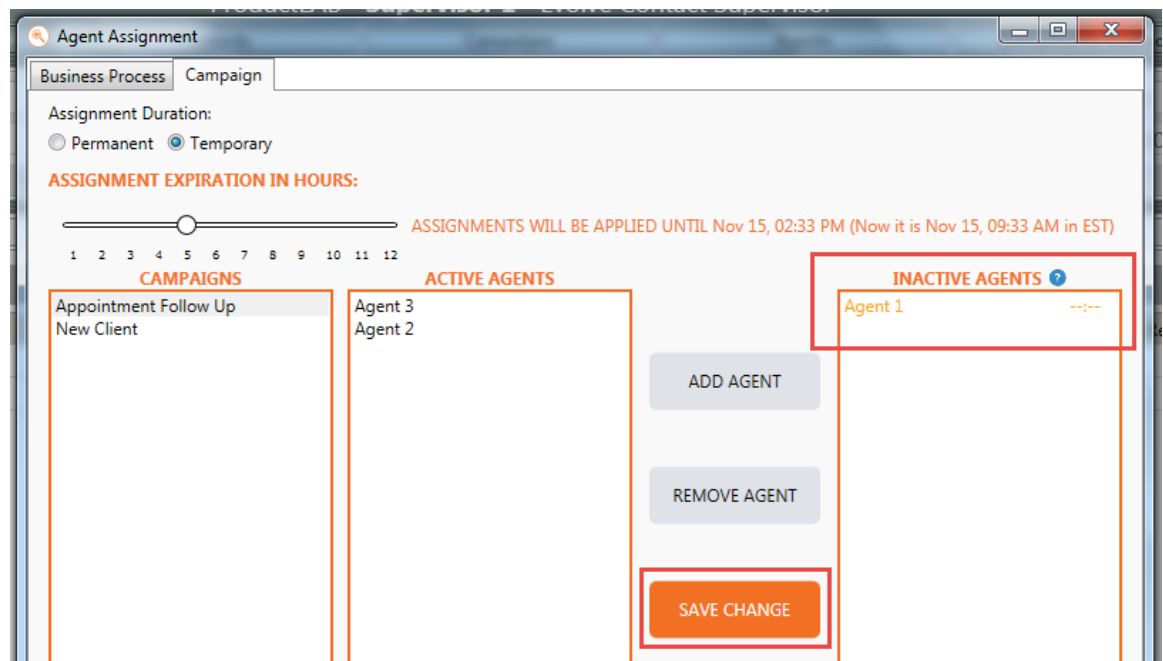


6. **Temporary Assignment Duration:**
  - a. Select the Campaign and Agent you wish to remove temporarily from the campaign. Ensure that the Temporary Assignment Duration is selected.
  - b. Select Assignment Expiration in Hours for the agent. You will see the Assignment will be applied until (x) will be updated to showcase when the agent will be placed back in the queue.

# ECS Supervisor Client: Quick Reference Guide



- c. Select Remove Agent.
- d. The Agent will be moved from the active to the Inactive Agents column. Select Save Change.

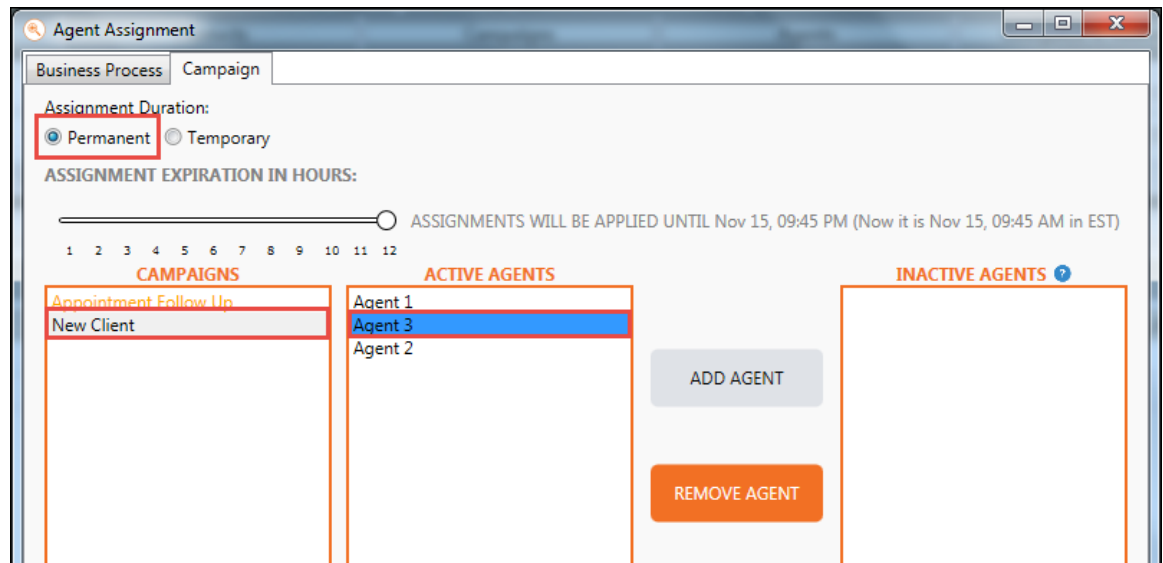


- e. When the changes are saved the inactive agents time will be updated to show when they will be placed back into the active agents column to start receiving calls again from the campaign.

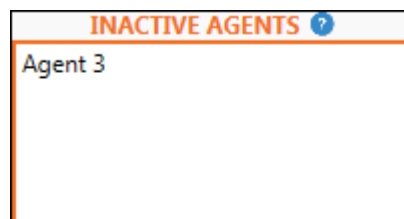


## 7. Permanent Assignment Duration:

- a. Select the Campaign and Agent you wish to permanently remove from the campaign. Ensure that the Permanent Assignment Duration is selected. The Assignment Expiration Hours will no longer be available.

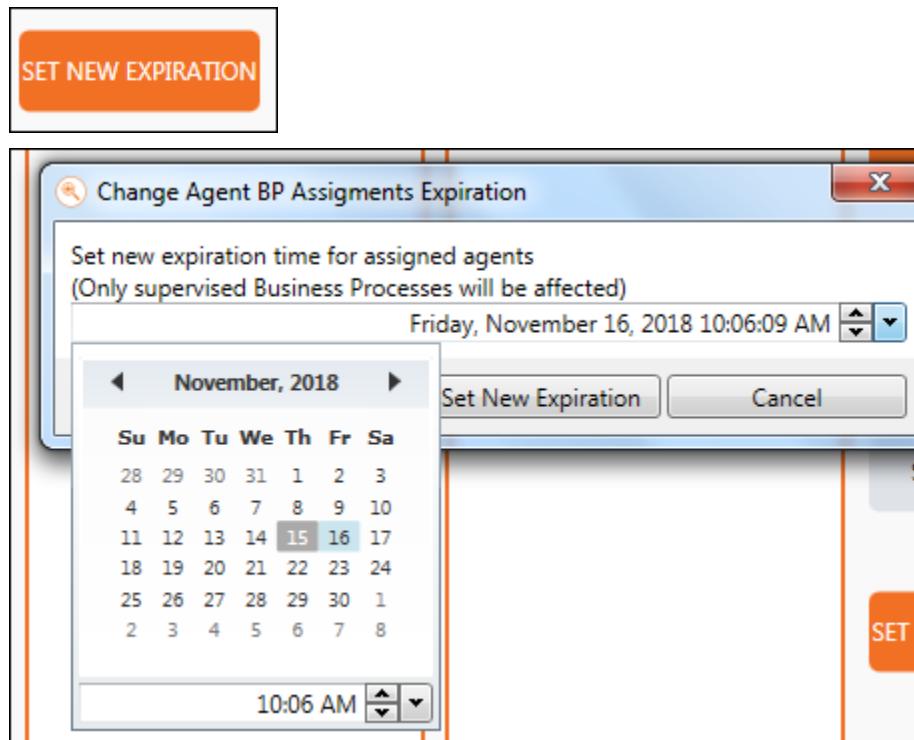


- b. Select Remove Agent
- c. The Agent will be moved from the Active to the Inactive Agents column. Select Save Change.
- d. The agent will be saved as an inactive agent and no longer receive calls from the campaign until manually moved back as an active agent.



## 8. Set New Expiration

The set new expiration allows you to set a new expiration time for agents that have been temporarily assigned to the inactive column of a campaign. Selecting the New Expiration tab will allow you to select a new time and even day for the agents expiration.



## 9. Reset

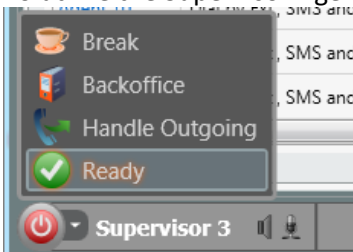
Reset allows for the reset of all agent assignments back to their original state.

## Supervisor Agent AppBar

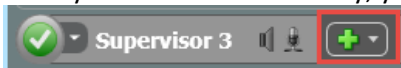
The Supervisor Agent AppBar allows you to communicate with other agents or supervisors, place out outbound calls, manage agent monitoring activities, and handle queued calls if necessary. It has the same usage and functionality as the Agent Client.

### Utilizing the Supervisor Agent AppBar

1. To utilize the Supervisor Agent AppBar, the Supervisor state needs to be set to Ready -



2. Once your state is set to ready, you can access the directory and dial pad -



3. From the directory you will be able to initiate a call or chat with another agent or supervisor. You can filter agents and supervisors by Business Processes.

# ECS Supervisor Client: Quick Reference Guide

