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Supervisor's Guide

In addition to having all the features a regular Agent has, the Supervisor also has the ability to run Historical Reports and real-time monitoring reports, monitor live calls, and have a better overall view of what's going on in the Contact Center. They also have the ability to manage the FAQs and delete records within the Packet8 CRM.

Supervisor's Control Panel

Unlike the regular Agent's Control Panel, a Supervisor's Control Panel allows one to see not just the queues and groups that they have been assigned to, but also any of the queues and groups that have been set up in the tenant.

The Supervisor's Control Panel also provides the Agent's Time On Status (the amount of time in the current status), as well as the Longest Wait Time in the queue.

⏏
Working Offline
⏪

00:03:30

Request Transaction Take Break Log Out

Status	Phone	Chat	Email
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TRANSACTION	
None.	

SUPERVISED GROUPS			[SETUP]
Agent	Status	Time On Status	
- <u>Sales</u>			
<u>Alia Atreides</u>	<u>Logged Out</u>	n/a	
<u>Betty Benard</u>	<u>Logged Out</u>	n/a	
<u>John La</u>	<u>Offline</u>	03m:35s	
- <u>Support</u>			
<u>Alison George</u>	<u>Logged Out</u>	n/a	
<u>Pierre-Michel Ansel</u>	<u>Logged Out</u>	n/a	
<u>Spike Spiegel</u>	<u>On Call</u>	00m:39s	

SUPERVISED QUEUES				[SETUP]
Queue	Busy	Waiting	Long. Wait	
- <u>Chat</u>				
<u>Billing</u>	0	0	n/a	
<u>Sales</u>	0	0	n/a	
<u>Support Chat</u>	0	0	n/a	
- <u>Phone</u>				
<u>Billing</u>	0	0	n/a	
<u>Operator</u>	0	1	00m:14s	
<u>Sales</u>	0	0	n/a	
<u>Support</u>	1	0	n/a	
- <u>Voice Mail</u>				
<u>After Hours Voice Mail</u>	0	0	n/a	
<u>Support Voicemail</u>	0	0	n/a	
- <u>Email</u> (pull)				
<u>Expedite Queue</u>	0	0	n/a	
<u>Support</u>	0	0	n/a	

Monitoring your Contact Center

To get more detailed information on what's happening in your contact center, a Supervisor can access the "Supervision Desktop" by clicking on the "Monitoring" button up in the top right of the screen. This will give the Supervisor real time statistics as well as the ability to playback any recorded calls or monitor live calls.

Agent	Current State	Time On Status	Active Queues	Last Login	Tot. Time Log. In	Tot. Time On Trans
Sales						
Alia Atreides	Logged Out	n/a	9 of 9	n/a	00m:00s	00m:00s
Betty Benard	Logged Out	n/a	7 of 7	n/a	00m:00s	00m:00s
John La	Offline	07m:35s	11 of 11	02:04:09	00m:06s	00m:00s
Support						
Alison George	Logged Out	n/a	11 of 11	n/a	00m:00s	00m:00s
Pierre-Michel Ansel	Logged Out	n/a	1 of 3	n/a	00m:00s	00m:00s
Spike Spiegel	Wrap Up	03m:52s	4 of 4	n/a	02m:57s	00m:47s

The "Setup" tab allows the Supervisor to specify which queues or groups they want to see in the Control Panel. The "Queue Management" and "Agent Management" tabs give you real-time statistics and allow you to monitor your Contact Center efficiently.

On each of the Management tabs, you will find four buttons located at the top right corner of the window:

- **Playback** - used for playback of recorded calls
- **Real Time** - current statistics for call center
- **Last 30 Minutes** - rolls up the last 30 minutes in your contact center
- **From Beg. of Day** - statistics from the beginning of the day starting at 12:00AM

Note: The Supervision Desktop can also be accessed by clicking on a queue or agent in the main Agent Desktop's control panel.

Viewing Queues

From left to right the areas of the screen available are:

Queues: All of the queues that you have Monitoring Access to. There could be other queues in your contact center but you must have rights granted in the Configuration Manager to access the queues through the Monitoring tab.

Activity: This will show you the current SLA activity of the queue. An arrow will appear beside the number that will indicate if your SLAs are going up or down. If SLA is not set on the queue, then this will be marked as n/a (not applicable).

Target: This will show you the target SLA that is set for the queue. It will be marked n/a if a target SLA is not set.

Busy: Are the number of agents in a busy status, working on a contact.

Waiting: Are the number of agents in a waiting status.

Longest Wait: If there are currently transactions waiting in the queue, this will show you the wait time of the transaction that has been waiting the longest.

SL Wait Limit:: This will show you the Service Level Waiting Limit that has been set. It is the amount of time the agents have to accept the transaction before being flagged as not meeting SLAs.

Average Processing: Is the average processing time for agents to handle contacts in that particular queue.

Enabled Agents: This Will show you how many agents are assigned and enabled in that particular queue.

Drilldown Screens in Queue Management

There are two areas for drilldown in the queue management screen:

- Queue Drilldown
- Enabled Agents Drilldown

In this example when the Customer Service Phone Queue link is selected the bottom of the screen opens up and shows the agent information:

- Agents Assigned
- Agents Enabled and their skill level
- Agent Status
- Agent Time on Status
- Active Queues for that agent

If you click on the agent's name the left hand side of the screen will open up and show the current screen pop information for that agent if available:

If you click on the Active Queues Link the application will take you to the Agent Management Screen.

Viewing Agents

From left to right the areas on this screen are:

Agent: Shows the agents that are assigned to the groups you are assigned to monitor.

Current State: Shows the agents current status.

Time on Status: Shows the time the agent has been in their current state.

Active Queues: Shows how many queues the agent is assigned and enabled in.

Last Login: Will give you the time the agent logged in last.

Tot. Time Logged In: Total Time Logged In, will tell you how long that agent has been logged in.

Tot. Time on Trans: Total Time on Transaction, shows how long the agent has been on the current transaction.

Drilldown Screens in Agent Management

There are two areas for drilldown in the queue management screen:

- Agent Drilldown
- Active Queues

***Both will give you the same functionality

In the above example I clicked on the agent Sadie Ramirez and the bottom of my screen opens up and gives me the Queues Sadie is assigned to, which includes information on whether she is enabled in a queue, her skill set in that queue, the number of other active agents and the number of contacts waiting. On the right you can see her current screen pop or contact she is working on. The same

information will appear if you click on the Active Queues link as well.

If you click on the Active Queues link then the Queue Management screen will come up.

Live Call Monitoring

Supervisor's can have the ability to listen in on live phone calls. (Must be set in the Configuration Manager) Under the "Agent Management" tab will be a "Monitor" button which will give you a list of Agents that the Supervisor has access to.

When an Agent is on a call, you will see a "Monitor" button appear next to their name. When you click on the button, the bottom of the Supervision Desktop shows the details of the calls while the Supervisor's phone should ring. Once the Supervisor answers the call they will be able to listen in on the Agent talking with the Caller. Neither the Agent or the Caller will know that anyone had joined the conversation. If you click on the "Join Call" button you will then be conferenced into the conversation and will be able to talk to all parties connected.

To finish monitoring, hang up the phone or click on "Finish Monitoring".

Playback Recordings

Recorded phone calls can be accessed through the Supervision Desktop. You will find the recordings under the "Playback" button located under each tabs. Both areas contain the same recordings sorted by Queues (under the Queues management) and Agents (under Agent Management).

When selecting an Agent or Queue for playback, the bottom of your screen will open up and give you a listing of all the recorded calls. Once you select the call you want to play back, the right hand side of the window opens to show the call details from the screen pop and gives you the ability to play the recorded file. (You must have a media player installed on your computer such as Microsoft Windows Media Player or Apple Quicktime.)

Deletion of Recorded Files

Recordings are stored depending on the amount of storage you have purchased. Once the storage is filled, then the oldest recordings will be removed to add newer recordings. For example, if you have enough storage for 10 hours of recordings, then you will always have the last 10 hours of recordings that have been made.

Historical Reports

The reporting function allows you to run pre-defined historical reports on Channels, Media, Queues and Agents for a specified date range and granularity. All reports are exported to Microsoft Excel. The Available Reports scroll box displays a list of all pre-defined historical reports. A preview of the layout and the information to expect is located in the "Report Preview" box. (Note: Previews do not represent live data of your tenant.) To generate your own report:

1. Select the report you wish to run from the Available Reports list
2. Select the Granularity you wish to run the report in:
 - 30 minutes: Report will be broken down by 30 min intervals
 - day: Report will be broken down by day
 - date range: Report will give you totals and averages for the date ranges selected in the "Date Range" fields.
3. Click the "Export to Excel" button.

After a few seconds of processing, your report will appear in a new Excel window. If you want to print or save this report, just use the standard Excel functions in the File menu. You can also specify the Queues or Agents you want to include in the reports by using the "Queue selection" and "Agent selection" menus. If you do not want any subtotals in the reports, you can choose to disable them by

unchecking the "Show totals" button.

Managing FAQs

Frequently Asked Questions (FAQ) may be displayed on line for customers to browse through in your company's Support Center or by using a Direct URL.

FAQs may also be used by Agents to answer customers' questions. Quick shortcuts are provided to insert FAQs into chat or email to customers. The knowledge base can be accessed at anytime in the Agent Interface by clicking on the FAQ button along the top of the screen. There are three tabs that you can access:

- Index - a list of categories of FAQ
- Shortcuts - a shortcut is a word, abbreviation, or number assigned to a FAQ. Shortcuts help agents quickly insert FAQ answers into emails, follow-ups, and chats.
- Search - allows you to search FAQs based on a word or string of words

Creating Categories and FAQs

Before you can add an FAQ, you must create a Category that the FAQ belongs to.

Categories

Click on the "Add New Category" link on the left panel of the knowledge base. This will cause a new window to open up where you can name the category. You can choose to make category private which will prevent customers from accessing the questions through the Support Center or Direct URLs. However, agents within the contact center will be able to read the entries in the private Category.

If you want it to be available externally, you can check off which of your available Support Center sites you want the new category to display on. Your company may have more than one Support Center site for your customers. All your Support Centers should be listed in the box.

Once you have created the category, you can now add FAQs to them.

FAQs

Click on the category you want to add the FAQ to. On the right hand side, click on "Add New FAQ" which should open a new window allowing you to create the Question and the Answer of your FAQ.

In the bottom left corner of the Add FAQ window is the Shortcut field. Choose a shortcut word or number and enter it in the Shortcut box. When agents want to insert FAQ data into emails, follow-ups, or chats they type an abbreviation or shortcut to call up the data.

You can choose to have the answer to be formatted using HTML. If you check this box, the answer field will accept html and javascript allowing you to insert links to other web sites. You can also include images, tables, and video in your FAQ using HTML.

If you want to make the FAQ private and restrict access externally, you can check the box "This FAQ is Private".

Attachments

Attachments are a convenient way to add long documents or detailed information to your FAQ knowledge base. To add attachments to your FAQ, click on the "Attachments". An attachments form appears where you will be able to select the file you want to upload (copy) from your PC to the FAQ. Be sure the file you choose is smaller than two megabytes or you will not be able to upload it.

Saving Display order of FAQs

If you want to modify the display order of your Categories or FAQs, simply drag and drop the Category/FAQ where you want it then click on "Save the display" link to make the changes permanent.

Knowing About the Most Popular FAQ

To know customers' favorite FAQ, you can look at the number of hits it has received. The number of hits tells how many times customers accessed each FAQ. Hits made by Agents or Supervisors are not recorded.

You can see the hits that each Category receives on the left panel of the knowledge base under the "Hits" column.

Deleting CRM Records

Supervisors can be given the ability to delete records within the Packet8 CRM. To delete individual records, click on the "View" link on the Customer or Case bar in the CRM. (You must have a Customer or Case loaded on screen.)

Next, click on the "Delete" link located in the top right corner of the CRM. This will give you a warning that if you accept, will delete the record permanently from the Packet8 CRM. There is no way to restore a record once it is deleted.

Note: If you delete customer record, all associated cases for that customer will also be deleted.

You can also perform a mass delete in the case you need to remove many records at one time. Please see the following areas for more information on other delete methods.

Deleting many records

You can delete many records at once from the Packet8 CRM, if you are a supervisor with delete privileges.

In the Customer or Case search page, search for the records that you want to delete. There are three deletion options:

- You can select the records to be deleted by clicking on the checkbox next to each record, then clicking "Delete Selected".
- You can select all the records on the page by clicking on the checkbox at the top of the list, then clicking "Delete Selected".
- You can delete all of the records found in this search by clicking "Delete All".

You will be given a chance to cancel this operation, but once you confirm the delete request, the records will be permanently deleted.

Note that deleting a Case will also delete all associated follow-ups and attachments, while deleting a Customer will also delete all associated cases, follow-ups and attachments.

Deleting emails still in queue

To delete emails located in a specific queue, click on the number of emails waiting for that queue. This should bring up a list of all the emails waiting to be accepted. To delete, click on the check box next to the email you want to remove. If you want to delete all emails, click the top most checkbox which should check all emails. Once done, click on the delete button which will delete all emails permanently.

Note: This will not delete the Customer record associated with the email.