



Buzzeasy Teams Supervisor Guide

Supervisor Guide

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Buzzeasy Teams Supervisor Guide

This document details the supervisory tasks using the supervisor dashboards, found in the supervisor reports of the Buzzeasy Teams Omni-Channel Contact Centre service.

Access Reports

Access the Supervisor reports with internet browser software. Most popular browsers are supported. Your browser software should be up to date to ensure continued support.

Use the Buzzeasy New Portal to access Buzzeasy portal reports.

Reports URL

Navigate to the new Buzzeasy portal URL.

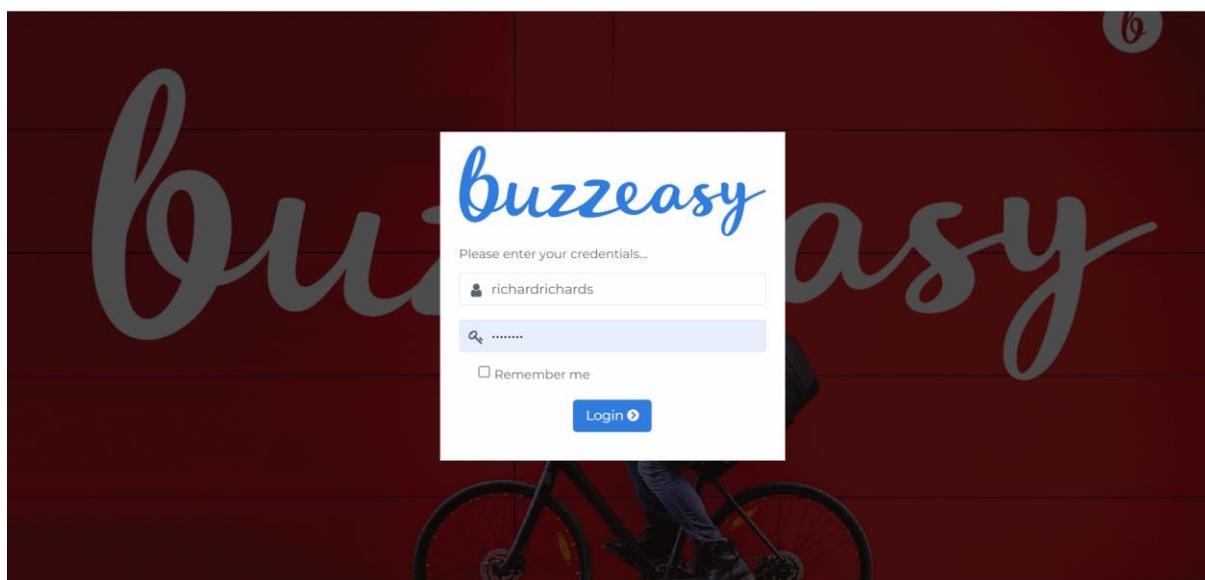
The URL is: <https://betaportal.buzzeasy.com>

- Select Queues or Teams from the Reports heading in the portal sidebar.

Login

Login to the Buzzeasy Portal.

Buzzeasy uses Microsoft Office365 credentials to log you in. You may need to provide these credentials when you first logon.



Your browser may be able to store these details and provide your credentials automatically. This is dependent on your browser, browser version, and local security policy.

Access to the portal reports is controlled by Buzzeasy roles based access.

An Administrator should configure your Buzzeasy user so that you have the correct permissions to access the portal and access reports.

The permissions conferred on your agent account will determine what you see in the portal.

If you have the Reports permission, you will see the Reports heading in the portal's navigation side-bar. The reports available are listed below the Reports heading.

As a Supervisor you may have permissions to create or edit agents or other entities in the Portal. If this is the case you will see more entries in the portal's navigation side-bar.

The role of the Administrator is beyond the scope of this guide.

Locate Queues Report

Select Queues from the Reports heading in the Buzzeasy portal sidebar.

Queue	Service Level	Current LWT	Waiting	Connected	Completed	Abandoned
Orders	38%	00:00	0	0	12	1
Repairs	0%	00:00	0	0	0	0
Returns	0%	00:00	0	0	0	0

Locate Teams Report

Select Teams from the Reports heading in the Buzzeasy portal sidebar.

Team	Agents Logged In	Agents Busy	Agents On Break	Agents Available	Tasks Handled	Tasks Missed
Default Team	1	0	0	1	12	0
Development and Construction	1	0	0	1	9	0
Estate Management	1	0	0	1	9	0

Refresh interval

Realtime reports communicate with servers every 10 seconds, which means that a page, or client, will retrieve new data from the servers every 10 seconds. This might result in data variations when comparing 2 different pages or clients. This is perfectly normal as the refresh polling may start differently for each of the clients.

Example:

Page 1: Starts at 00:00:01 Page 2: Starts at 00:00:04

After the refresh, page 1 and page 2 may have slightly different data due to the refresh interval not overlapping, however, both are accurate for the time they were refreshed. We do not recommend comparing 2 or multiple pages at the same point in time to identify the absolute truth, as all of our realtime data and displays use the same source and the only differences are filters and moment of the last refresh.

Report Features

This section examines features of the reports. The procedures for understanding and operating the reports are detailed elsewhere in the guide.

You should read this section to help you understand the material in other sections of the guide.

Reports Available

Two reports are available for the supervisor.

1. The Queues report
2. The Teams report

Each report consists of multiple dashboards.

Dashboards

A dashboard is a display of all of your key performance indicator data.

The intention of the dashboard is to provide information in a way that is very easy to understand.

The layout of the Queues report dashboard is different to the layout of the Teams report dashboard, but each dashboard displays key performance indicator data relevant to their subject queue or team.

The queues report displays the queues dashboard for each of your queues. The same dashboard layout is shown for each queue, displaying data for just that queue.

The teams report displays the teams dashboard for each of the teams you are a member of. The same dashboard layout is shown for each team, showing data for just that team.

Key Performance Indicators

Key performance indicators or KPIs in the dashboards, are measures in your data that, as the name suggests, indicate the performance of your contact centre.

Each KPI is detailed in later sections of this guide.

One example of a KPI from a queues report dashboard, is the number of conversations waiting to be connected with an agent.

One example of a KPI from a teams report dashboard, is the number of agents from that team who are logged in.

Note that the KPI data is current data, a single value, running total, or average for the day. Because the data is current and presented in as close to real time as technically possible, it helps you manage the immediate needs and performance of the contact centre.

Historical data, or data that is older than today's data, is displayed elsewhere, in Buzzeasy BI Reports.

Data Visualizations

Data visualizations in the report dashboards are graphic representations of the KPIs. They are an efficient way of communicating data, they make the data easier to understand.

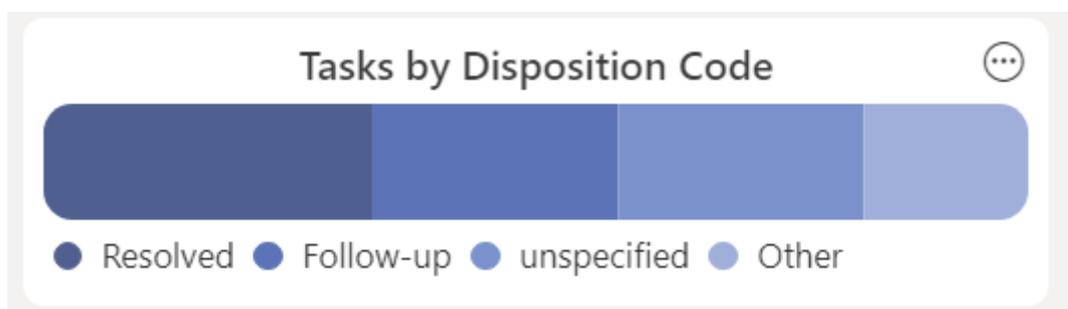
Many of the dashboard KPIs are presented with data visualizations or through data visualizations.

Examples of the data visualizations used in the report dashboards include bar charts, stacked row charts and "speedometer" displays.

Service Level



The outer ring of the visualization changes colour to indicate progress towards a target.



The entire bar represents 100% of the data and all categories contributing to the data. Each category is represented as a percentage of the overall total.

Data Thresholds - Highlight Critical KPI Values

Formatting changes are also a form of data visualization. If a KPI or visualization that usually displays in green, displays red, this indicates that the data has exceeded a set threshold and may require supervisor intervention.

The KPIs shown in the data visualizations may change colour, or format, when the data reaches a certain critical level, or threshold.

This change in appearance based on a critical data value, provides a visual form of alert. This helps you to respond quickly and intervene to preserve your contact centre's attainment towards your performance targets.

Refer to the value at which the data visualization changes in appearance as the data threshold.

Waiting



In the illustration above, the Waiting KPI from the queues dashboard, shows how many conversations are waiting.

In this case with no calls waiting, the KPI displays in a yellow format. The threshold at which the formatting changes to alert the supervisor has not been reached.

Waiting



In this example a Supervisor has set the threshold of the Waiting KPI to one. With one call waiting the KPI displays in red.

Browse the navigation links for the steps to edit and set data thresholds.

The Queues Report

Select Queues under the Reports heading in the portal sidebar to display the Queues Report.

Oversee all Queues Key KPIs

Initially each queue’s dashboard displays six KPIs. Refer to these KPIs, as the queue's Key KPIs. In this view you gain an overview of all your queues' Key KPIs at a glance.

As you will see in the section Show more KPIs below, it is possible to concentrate on one queue and view all available KPIs for that queue. This may partially obscure your view of other queues.

If one or more of your queues are expanded to show all their KPIs, and you want to retain your overview of all queues, use the Show less button to return to the core KPI view. See the section Show fewer KPIs below for details.

Adjust the zoom settings of your browser and if necessary zoom out to see all of your queues in one view.

Reports > Teams

Queue	Agents Logged In	Agents Busy	Agents On Break	Agents Available	Tasks Handled	Tasks Missed
Default Team	1	0	0	1	12	0
Development and Construction	1	0	0	1	9	0
Estate Management	1	0	0	1	9	0

Understand Key KPIs

The key KPIs are always visible on the queues dashboard. The key KPIs display summary data. They are described below.

KPI	Description
Service Level	Daily Service Level. See Service Level Definition below.
Current LWT	The current longest wait time of the day.
Waiting	Total conversations waiting in the queue.
Connected	Total conversations connected with agents.
Completed	Daily total of completed conversations.
Abandoned	Daily total of abandoned calls.

Service Level - Definition

The Service level may be calculated in many ways. It can change subject to business requirements. This is the current formula for calculating the Service Level.

$$\text{Service Level} = \frac{\text{Number of calls answered within the service level threshold}}{\text{Number of calls offered}} \times 100$$

View Conversation Details - Queues Dashboard KPIs

A magnifying glass, magnify, or loupe, icon accompanies some of the KPIs in the dashboard. The icon symbolizes the action magnify.



Where a KPI has a magnify icon, you may select it to view further details.

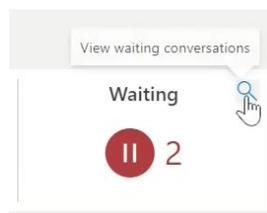
Select the magnify icon to see a list of conversation details. Many details of the conversation are listed, including the media type, conversation direction, and the identity of the caller or correspondent.

Queues KPIs With the Magnify Icon

- Waiting
- Connected
- Completed
- Abandoned

Waiting KPI - Info

- Select the magnify icon next to the Waiting KPI, to view a list of conversations that are waiting for connection to an agent.



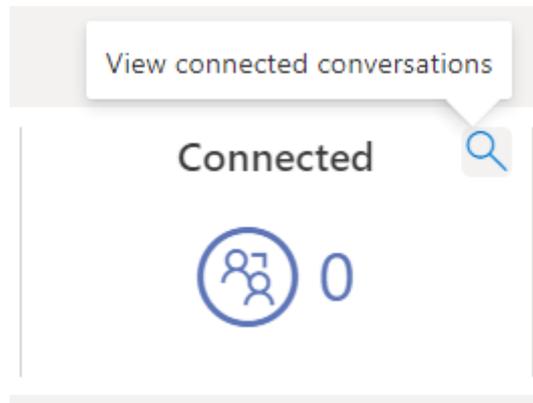
Waiting conversations



Position ↑	Wait time	Customer name	Customer identifier	Type
1	00:49	Unknown		Inbound
2	00:07	Unknown	+441 [redacted]	Inbound

Connected KPI - Info

- Select the magnify icon next to the Waiting KPI, to view a list of conversations that are waiting for connection to an agent.

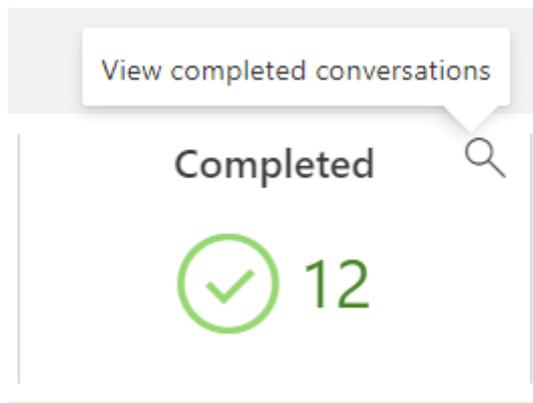


Connected conversations

Connected t...	Customer name	Customer identifier	Agents	Type
00:00	Unknown	+4417	A Doyle	Inbound

Completed KPI - Info

- Select the magnify icon next to the Waiting KPI, to view a list of conversations that are waiting for a connection to an agent.



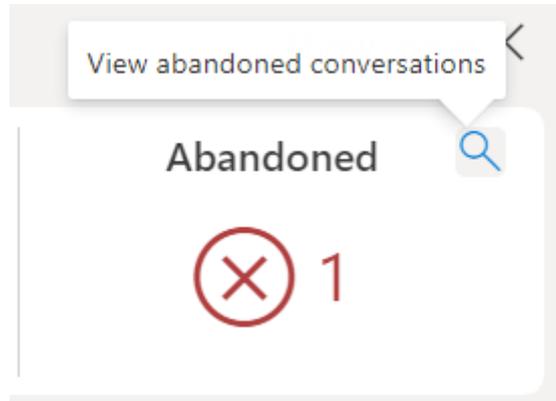
Completed conversations

Display of total 3

Timestamp	Total time	Connected time	Wait time	Self-Service time	Customer name	Customer identifier	Type
06/05/2022 09:05:34	00:17	00:07	00:04	00:06	Ciprian	+407	Inbound
06/05/2022 10:57:49	00:48	00:17	00:30	00:01	Ciprian Customer	+407	Callback
06/05/2022 11:00:07	01:21	00:03	01:17	00:01	Ciprian Customer	+407	Callback

Abandoned KPI - Info

- Select the magnify icon next to the Waiting KPI, to view a list of conversations that are waiting for connection to an agent.



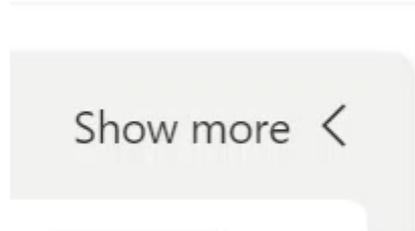
Abandoned conversations ×

Display of total **0**

Timestamp ↑	Wait time	Customer name	Customer identifier
05/05/2022 08:36:15	00:32	Ciprian [redacted]	+40753 [redacted]
05/05/2022 08:39:08	00:53	Ciprian [redacted]	+4074 [redacted]
05/05/2022 08:39:25	00:25	Ciprian [redacted]	+4075 [redacted]

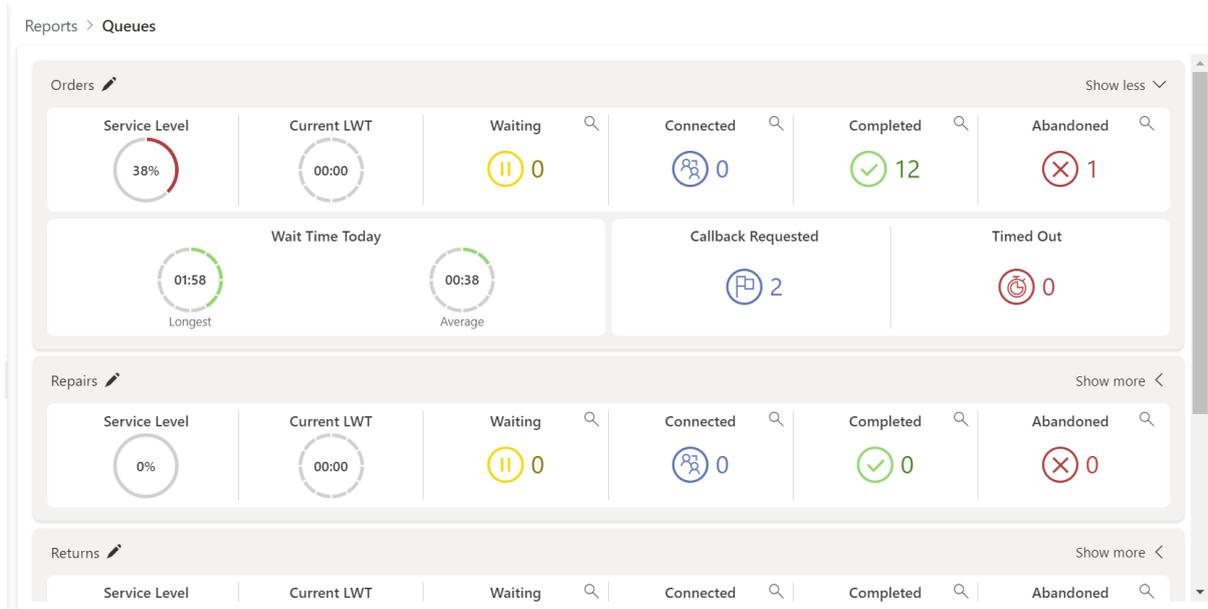
Show More KPIs - Queues Dashboard

At the top right of each queue's dashboard is a Show more control.



Select the Show more control to display all the KPIs on each dashboard.

When you select the Show more control, it is replaced by a Show less control.



Reports > Queues

Orders  Show less 

KPI	Value
Service Level	38%
Current LWT	00:00
Waiting	0
Connected	0
Completed	12
Abandoned	1
Wait Time Today - Longest	01:58
Wait Time Today - Average	00:38
Callback Requested	2
Timed Out	0

Repairs  Show more 

KPI	Value
Service Level	0%
Current LWT	00:00
Waiting	0
Connected	0
Completed	0
Abandoned	0

Returns  Show more 

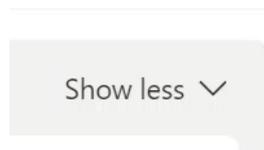
KPI	Value
Service Level	
Current LWT	
Waiting	
Connected	
Completed	
Abandoned	

The additional KPIs displayed are:

1. Wait Time Today – Longest
2. Wait Time Today – Average
3. Callback Requested
4. Timed Out

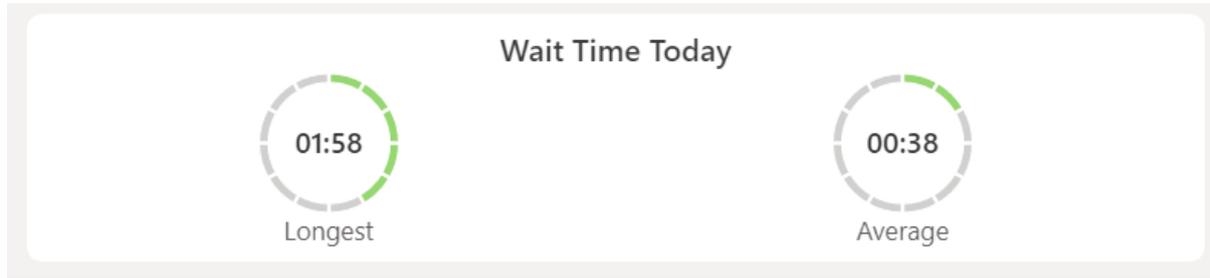
Show Fewer KPIs - Queues Dashboard

With all the KPIs visible, a Show less control appears at the right of the queue's dashboard.



Select Show less, to hide the additional KPIs and return to the summary view of six key KPIs.

Wait Time Today KPIs - KPI Description



Two KPIs appear on a Wait Time Today tile; they are described below.

KPI	Description
(Wait Time Today) Longest	The longest wait time of the day
(Wait Time Today) Average	The average wait time of the day

Callback - KPI Description

The Callback Requested KPI is described below.

KPI	Description
The Callback Requested	Total of callbacks requested

Timed Out - KPI Description

KPI	Description
Timed Out	Total of callbacks requested that have timed out

Set an Alert on Queues KPIs

Edit Data Thresholds of Queues KPIs

KPIs and their associated data visualizations may change in appearance at and above a certain critical data value. An example is where a KPI is formatted in red to signal to a supervisor that the KPI requires their attention and intervention. The value at which this change in appearance occurs is the data threshold.

Further details about what the data threshold is, may be found in the Navigate and Control Reports and Dashboards section of the guide. This part of the guide concentrates on the layout and details of setting a data threshold for each KPI.

You may edit the Threshold of These KPIs in the Queues Report:

- Service Level
- Current LWT
- Waiting
- Wait Time Today - Average

Enable Editing of a Data Threshold - Queues Dashboard

Select Queues from the Reports heading in the Portal sidebar.

Identify the queue where you want to edit a threshold.

If you want to edit the threshold of the Wait Time Today - Average KPI, you will need to display all KPIs.

Identify the pencil icon at the top left hand corner of the queue's dashboard.



You may hover your pointer over the icon to identify the icon, the tip text Enable threshold edit appears.

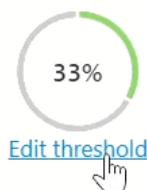
Select the pencil icon.

You may now edit the thresholds of user editable KPIs. on the selected dashboard.

Enable or Disable a Data Threshold

If necessary, enable the editing of a data threshold using the pencil icon.

- Select the blue text "Edit threshold" on the KPI where you want to enable a data threshold, or conversely disable a data threshold.

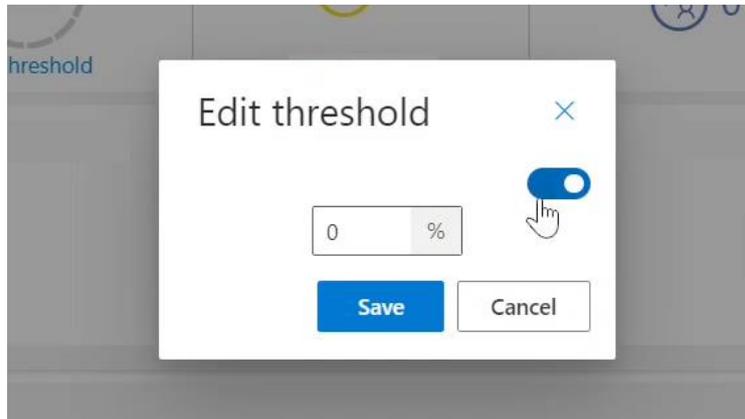


Edit Threshold - Enable Control

A small window appears in the centre of the screen and the rest of the screen appears darker.

Refer to this window as the edit threshold dialog. The dialog is similar for most data thresholds, however for some KPIs you will enter a duration, for others a value.

- Use the slider control at the top right of the edit threshold dialog to enable or disable a data threshold.
- Use your pointer or mouse to drag the slider control to the right or left.



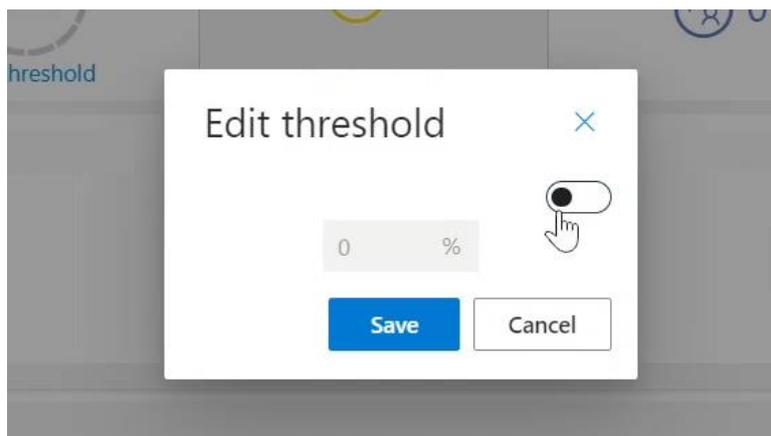
When the slider control is enabled, it appears blue.

- Enable the slider control to enable the data threshold.

The KPI and visualization's appearance will now alter when the KPI value reaches the data threshold.

Edit Threshold - Disable Control

When the edit threshold slider control is disabled, it appears white.



Disable the slider control to disable the data threshold.

The KPI and visualization will now maintain the same formatting regardless of value.

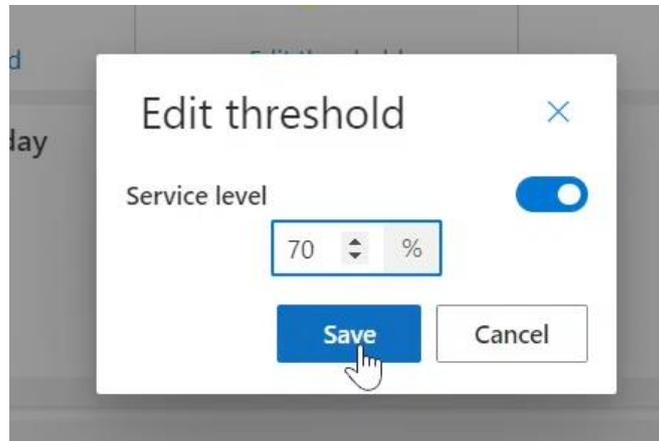
Select Save to ensure any change you make is applied.

Service Level - Set Data Threshold

If necessary, enable the editing of a data threshold.

Select the text Edit threshold, on the Service level KPI.

If not currently enabled, enable the control with the slider.



Enter a service level as a percentage.

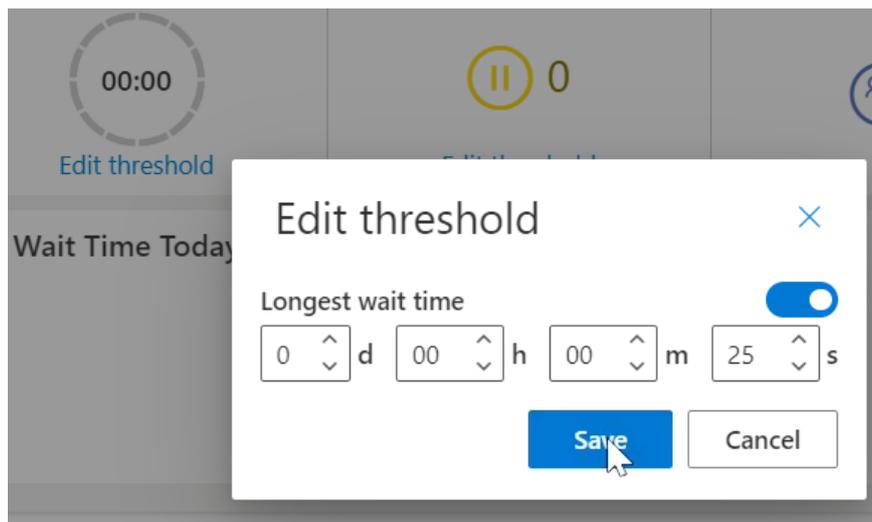
Select save.

Current LWT - Set Data Threshold

If necessary, enable the editing of a data.

Select edit threshold on the current longest waiting time (LWT) KPI, from the Key KPIs tile in the queues dashboard.

If not currently enabled, enable the control with the slider.



Enter a duration.

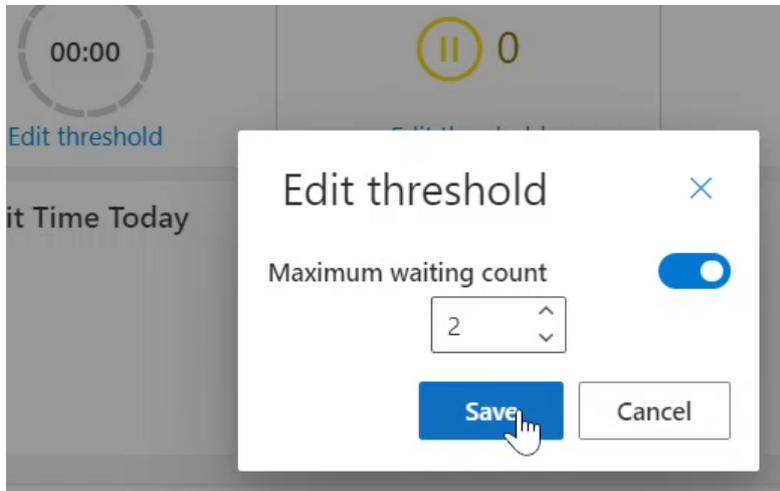
Select save.

Waiting - Set Data Threshold

If necessary, enable the editing of a data threshold.

Select edit threshold on the waiting to be on from the key KPIs tile in the queues dashboard.

If not currently enabled, enable the control with the slider.



Enter a maximum waiting count total.

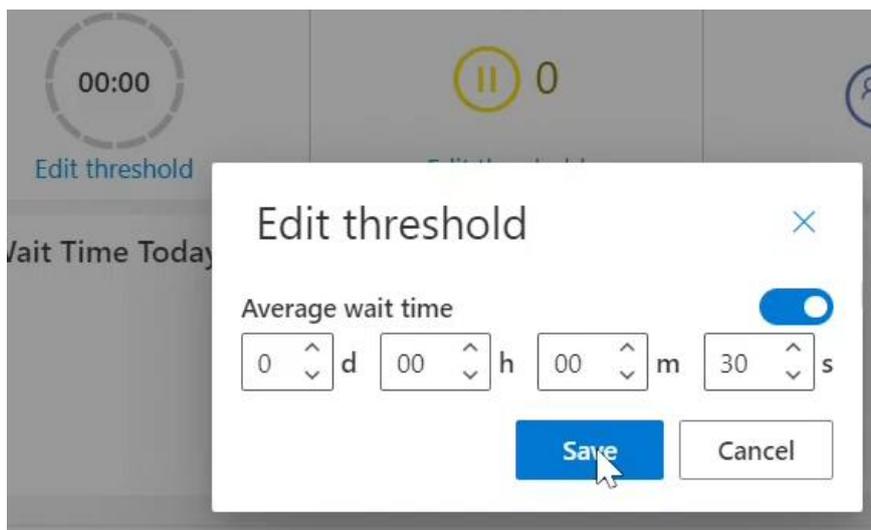
Select save.

Wait Time Today - Average - Set Data Threshold

If necessary, enable the editing of a data threshold.

Select edit threshold from the average KPI in the wait time today tile.

If not currently enabled, enable the control with the slider.



Enter a duration for the average wait time.

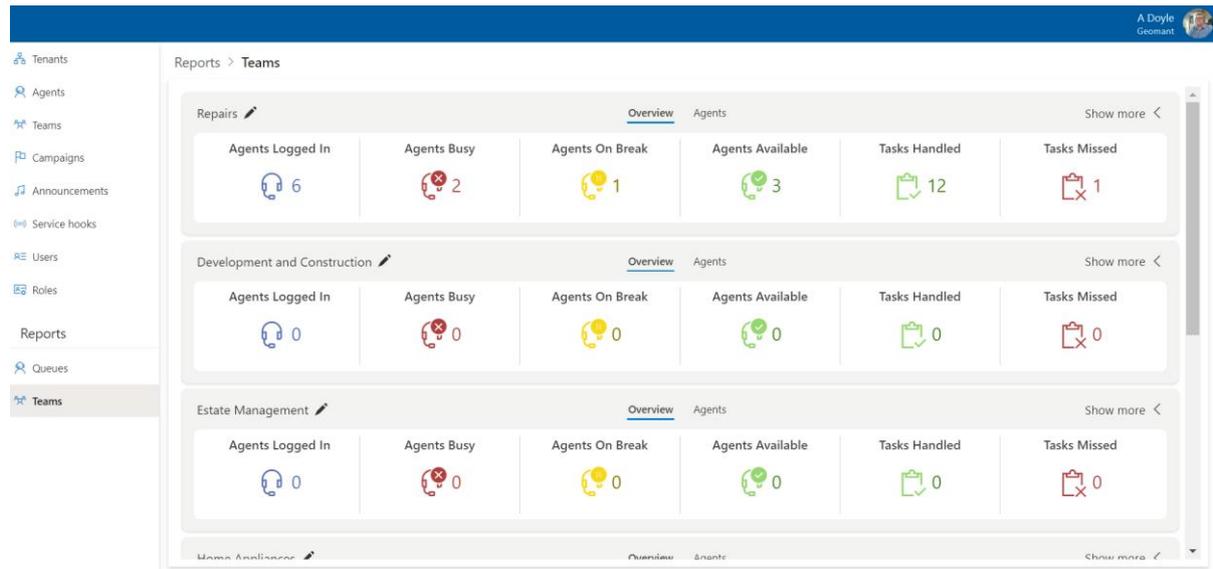
Select save.

The Teams Report

The Teams report consists of dashboards of key performance indicator or KPI data. A teams dashboard displays for each of your teams, showing data specific to that team. Select Teams under the Reports heading in the portal sidebar to display the Teams Report.

Oversee All Teams Key KPIs

Initially each team’s dashboard displays six KPIs. Refer to these KPIs as the team’s Key KPIs.



In this view you gain an overview of all your teams' Key KPIs at a glance. As you will see in the section Show more KPIs below, it is possible to concentrate on one queue and view all available KPIs for that queue. This may partially obscure your view of other teams. If one or more of your teams are expanded to show all their KPIs, and you want to retain your overview of all teams, use the Show less button to return to the core KPI view. Adjust the zoom settings of your browser and if necessary zoom out, to see all of your teams in one view.

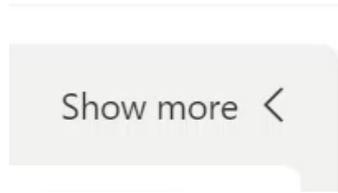
Understand Key KPIs - KPI Description

Six KPIs are always visible in the dashboard, the six Key KPIs. The Key KPIs show summary information. The key KPIs are described below.

KPI	Description
Agents Logged In	Total team member agents logged in
Agents Busy	Total agents busy with conversations
Agents On Break	Total agents on break
Agents Available	Total agents available to handle conversations
Tasks Handled	Total conversation tasks handled that day
Tasks Missed	Total abandoned conversation tasks

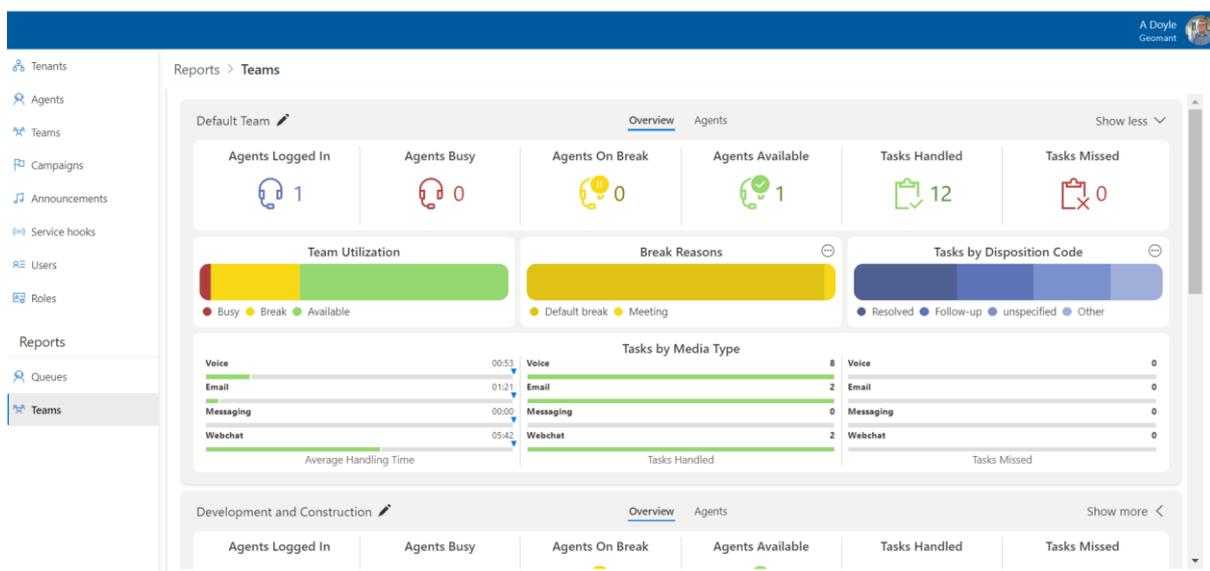
Show More KPIs - Teams Dashboard

At the top right of each queue's dashboard is a Show more control.



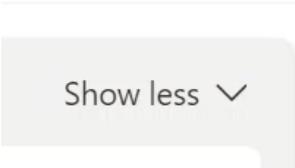
Select the Show more control to display all the KPIs on each dashboard. Four additional data visualizations of KPIs display.

1. Team Availability - Stacked horizontal bar chart - Three agent state durations as a percentage of total.
 - Busy - Total agent busy state duration busy duration
 - Break - Total of all agent break types duration
 - Idle - Total of agent idle state duration
2. Break Reasons - Stacked horizontal bar chart - Each utilized break type duration as a percentage of total.
3. Tasks by Disposition Code - Stacked horizontal bar chart - Each disposition code utilized in the after-work step of closing a task, as a percentage of total.
4. Tasks by Media Type - Three horizontal bar charts, consisting of four metrics each.
 - Average Handling Time
 - Voice - Average call handling time
 - Email - Average email handling time
 - Messaging - Average messaging app conversation handling time
 - Webchat - Average webchat handling time
 - Tasks Handled
 - Voice - Total voice calls handled
 - Email - Total emails handled
 - Messaging - Total messaging app conversations handled
 - Webchat - Total webchat conversations handled
 - Tasks Missed
 - Voice - Total voice calls missed
 - Email - Total emails missed
 - Messaging - Total messaging app conversations missed
 - Webchat - Total webchat conversations missed



Show Fewer KPIs - Teams Dashboard

With all the dashboard tiles visible, a Show less control appears at the top right of the dashboard.



Show less ▾

Select Show less, to hide the Team Availability, Break Reasons, Tasks by Disposition Code and Tasks by Media Type tiles.

Team Availability - KPI Description

The KPIs that appear on the Team Availability data visualization, are described below.

KPI	Description
Busy	Total agents currently busy with conversation tasks
Break	Total agents currently on break
Idle	Total agents in idle state, available to handle conversation tasks

Break Reasons - KPI Description

The duration of time spent on break KPI, appears on the Break Reasons data visualization. This KPI is presented as a stacked row chart. The stacked row chart shows the duration of each break types used, as a proportion of the total duration for all breaks.

The table below features an Administrator Configured Break Name. This this will be different at each contact centre, it represents each break name you have configured.

KPI	Description
Default Break	Duration this break was used, presented visually as a proportion of all break durations - A system defined break type
RONA Break	Duration this break was used, presented visually as a proportion of all break durations - A system defined break type
Supervisor Break	Duration this break was used, displays as a proportion of total duration of all breaks. System defined break type
Administrator Configured Break Name	Duration a break-name configured by an administrator was used. This repeats for each configured break name. Displays as a proportion of total break durations

Tasks by Disposition Code - KPI Description

The KPI that appears on the Tasks by Disposition Code data visualization, is broken down by a category for each disposition code used. An administrator may define multiple disposition codes.

The table below features an Administrator Configured Disposition Code. This will be different at each contact centre. It represents each disposition code you or your administrator has configured.

KPI	Description
unspecified	Total number of times no disposition code was used
Administrator Configured Disposition Code	Total number of times this disposition codes was used - repeats for each configured code

Tasks by Media Type - Average Handling Time

Average conversation Handling time including wrap-up.

KPI	Description
Voice	Average voice call handling time
Email	Average email message handling time
Messaging	Average messaging app conversation handling time
Webchat	Average webchat conversation handling time

Tasks by Media Type - Tasks Handled

Total conversations handled split by media type.

KPI	Description
Voice	Total voice call handled
Email	Total email messages handled
Messaging	Total messaging app conversations handled
Webchat	Total webchat conversations handled

Tasks by Media Type - Tasks Missed

KPI	Description
Voice	Total calls redirected by RONA plus any calls abandoned whilst ringing with an agent
Email	Total missed email conversations
Messaging	Total missed messaging app conversations
Webchat	Total missed webchat conversations

Set an Alert on Teams KPIs - Edit Data Thresholds

You may edit the threshold of the Average Handling Time KPI on the Tasks by Media Type Type tile. These media types are supported:

- Voice
- Email
- Messaging
- Webchat

Edit a Threshold in a Teams Dashboard

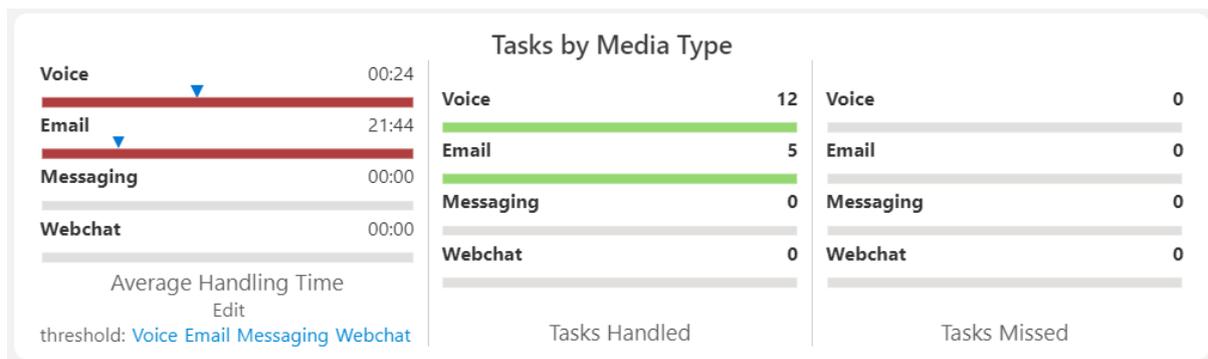
Select Teams from the Reports heading in the Portal sidebar

Identify the team where you want to edit a threshold.

Select the pencil icon at the top left hand corner of the team's dashboard. You may hover your pointer over the icon to identify it, the tip text Enable threshold edit appears.

Select Show more at the top right hand corner of the team's dashboard.

Identify the Tasks by Media Type tile and the Average Handling Time within it.



You may edit thresholds for Voice, Email, Messaging, and Webchat conversations.

All of the Tasks by Media Type thresholds are set as a duration of time.

Each of the Average Handling Time data thresholds are set in the same way. The only difference appears in the details on the edit threshold dialog where the relevant media type appears.

Set Average Handling Time - Voice Data Threshold

Select Voice

If required, enable the threshold with the slider control. The control appears blue when the threshold is enabled.

Media Type	Tasks Handled	Tasks Missed
Voice	13	3
Email	1	0
Messaging	0	0
Webchat	0	0

Set the required duration for the threshold.

Select Save.

Set Average Handling Time - Email Data Threshold

Select Email

If required, enable the threshold with the slider control. The control appears blue when the threshold is enabled.

Media Type	Tasks Handled	Tasks Missed
Voice	13	3
Email	1	0
Messaging	0	0
Webchat	0	0

Set the required duration for the threshold.

Select Save.

Set Average Handling Time - MessagingData Threshold

Select Messaging

If required, enable the threshold with the slider control. The control appears blue when the threshold is enabled.

Media Type	Tasks Handled	Tasks Missed
Voice	13	3
Email	1	0
Messaging	0	0
Webchat	0	0

Set the required duration for the threshold.

Select Save.

Set Average Handling Time - Webchat Data Threshold

Select Webchat

If required, enable the threshold with the slider control. The control appears blue when the threshold is enabled.

The screenshot shows a user interface for setting a threshold. On the left, a modal dialog titled 'Edit threshold' is open. It contains a section for 'Webchat average handling time' with a blue toggle switch that is turned on. Below the toggle are four input fields for time units: '0' days, '00' hours, '06' minutes, and '00' seconds. At the bottom of the dialog are 'Save' and 'Cancel' buttons. A mouse cursor is pointing at the 'Save' button. Below the dialog, the text 'Average Handling Time' and 'Edit threshold: Voice Email Messaging Webchat' is visible. On the right, a table titled 'Tasks by Media Type' is shown. It has two columns: 'Tasks Handled' and 'Tasks Missed'. The rows are 'Voice', 'Email', 'Messaging', and 'Webchat'. The 'Voice' row shows 13 tasks handled and 3 tasks missed. The 'Email' row shows 1 task handled and 0 tasks missed. The 'Messaging' row shows 0 tasks handled and 0 tasks missed. The 'Webchat' row shows 0 tasks handled and 0 tasks missed.

Media Type	Tasks Handled	Tasks Missed
Voice	13	3
Email	1	0
Messaging	0	0
Webchat	0	0

Set the required duration for the threshold.

Select Save.

The Agents View of The Teams Report - View Agent Details

View Agents Break and Activity Details

From the Teams Report, select The Agents view.

The screenshot shows a dashboard with a left-hand navigation menu and a main content area. The main content area is titled 'Reports > Teams' and contains three sections: 'Home Appliances', 'Housing Strategy', and 'Mobile Devices'. Each of the first two sections has a 'Summary' view and an 'Agents' view. The 'Agents' view for each section shows a table with columns for 'Agents Logged In', 'Agents Busy', 'Agents On Break', 'Agents Available', 'Tasks Handled', and 'Tasks Missed'. The 'Mobile Devices' section shows a table with columns for 'Name', 'Status', 'Time in state', 'Total handled', 'Total missed', 'Voice', 'Email', 'Messaging', and 'Webchat'.

A view of all agents in the Team displays

Mobile Devices		Overview	Agents						
Name ↑	Status	Time in state	Total handled	Total missed	Voice	Email	Messaging	Webchat	
A Doyle	Available	05:35	9	0	5	2	0	2	
Ciprian	Logged out	02:57:09	3	0	3	0	0	0	

Agents who are logged out and the duration they have been logged out are displayed.

All other agents in the team are displayed. Their availability, break state and time in state display.

Activity across the various communication media also display: Total handled (conversations), Total missed (conversations), and totals for Voice, Email, Messaging and Webchat conversations appear.

Sort Agents

The agents may be sorted by any column. To the right of the Agents Name column heading is a small vertical arrow, the sort icon.

With arrow pointing upwards the sort applied is in ascending order, click the arrow again to display in descending order.

With the arrow pointing downwards, the sort applied is in descending order.

Agents may be sorted by any column. Select the column heading to activate the sort icon for that column.

Name	Status	Time in state ↓	Total handled	Total missed	Voice	Email	Messaging	Webchat
Ciprian	● Logged out	03:15:12	3	0	3	0	0	0
A Doyle	● Available	23:38	9	0	5	2	0	2

View Agents by Status

Sort your agents by state so you can get a view of which agents are available. Use the Status column sort.

Name	Status ↓	Time in state	Total handled	Total missed	Voice	Email	Messaging	Webchat
A Doyle	● Available	27:46	9	0	5	2	0	2
Ciprian	● Logged out	03:19:20	3	0	3	0	0	0

Logout an Agent

Select the agent's state.

Name	State	Time in state	Total handled	Total missed	Voice	Email	Messaging	Webchat
A Doyle	Available	56:46	9	0	5	2	0	2
Ciprian	Logged out	03:48:20	3	0	3	0	0	0

A Change State window appears over the report.

Change agent state

A Doyle

● Available

Change state to

Logged out

Change state Cancel

Select Logged Out from the drop-down control.

Select Change State.

Place Agent on Break

Select the agent's state.

Name	State	Time in state	Total handled	Total missed	Voice	Email	Messaging	Webchat
A Doyle	Available	56:46	9	0	5	2	0	2
Ciprian	Logged out	03:48:20	3	0	3	0	0	0

A Change State window appears over the report.

Change agent state ✕

A Doyle
● Available

Change state to

Meeting

Change state

Cancel

Select one of the break types from the drop-down control.

Select Change State.

Change Agent Details

Select the Agent's Name.

	Status ↓	Time in state	Total handled	Total missed	Voice	Email	Messaging	Webchat
A Doyle	● Available	01:12:59	9	0	5	2	0	2
Ciprian	● Logged out	04:04:33	3	0	3	0	0	0

The screen scrolls and the agent's details display to the right of the screen.

Reports > Teams > A Doyle

Overview Agents Show more <

Agents On Break 0

Agents Available 1

Tasks Handled 9

Tasks Missed 0

Overview Agents Show more <

Agents On Break 0

Agents Available 1

Tasks Handled 9

Tasks Missed 0

Overview Agents

stus ↓	Time in state	Total handled	Total missed	Voice	Email	Messaging	Webchat
Available	01:14:16	9	0	5	2	0	2
Logged out	04:05:50	3	0	3	0	0	0

Save agent

Save Delete Disable

Type
Supervisor

Name *
Aiden Doyle

Display name

Job title

Email address
@geomant.com

Phone number
+44'

Override work item thresholds

Overall Voice Email Webchat Messaging

5 1 3 3 3

Attributes
Search existing or enter a new key

Edit the agent as required and select Save.

Note that an agent may be given Supervisor / Agent status, you may make a name change or alter other details.

The Agents View of The Teams Report - View and Monitor Agent Conversations

View Agent Conversations

From the Teams Report, select The Agents view.

The screenshot shows the 'Teams' report interface. On the left is a navigation menu with options like Tenants, Agents, Teams, Campaigns, Announcements, Service hooks, Users, Roles, Reports, Queues, and Teams. The main content area is titled 'Reports > Teams' and contains three team cards:

- Home Appliances:** Agents Logged In: 1, Agents Busy: 0, Agents On Break: 0, Agents Available: 1, Tasks Handled: 9, Tasks Missed: 0.
- Housing Strategy:** Agents Logged In: 1, Agents Busy: 0, Agents On Break: 0, Agents Available: 1, Tasks Handled: 9, Tasks Missed: 0.
- Mobile Devices:** A table with columns: Name, Status, Time in state, Total handled, Total missed, Voice, Email, Messaging, Webchat.

Name ↑	Status	Time in state	Total handled	Total missed	Voice	Email	Messaging	Webchat
A Doyle	Available	05:35	9	0	5	2	0	2
Ciprian	Logged out	02:57:09	3	0	3	0	0	0

A view of all agents in the Team displays

This is a close-up of the 'Mobile Devices' team card. It shows the 'Agents' tab selected. The table below displays the agent details:

Name ↑	Status	Time in state	Total handled	Total missed	Voice	Email	Messaging	Webchat
A Doyle	Available	05:35	9	0	5	2	0	2
Ciprian	Logged out	02:57:09	3	0	3	0	0	0

Select the arrow-head icon to the left of the agents name.

This is a close-up of the 'Development and Construction' team card. It shows the 'Agents' tab selected. The table below displays the agent details, with a mouse cursor pointing to the arrow icon next to the name 'A Doyle':

Name ↑	Status	Time in state	Total handled	Total missed	Voice	Email	Messaging	Webchat
A Doyle	Busy	00:23	5	0	2	2	0	1

The Agents conversations display.

Reports > Teams

Development and Construction Overview Agents

Name ↑	Status	Time in state	Total handled	Total missed	Voice	Email	Messaging	Webchat
▼ A Doyle	● Busy	00:25	5	0	2	2	0	1

Media Type	Duration	Customer Name	State	Actions
 Voice	00:00		Active	Monitor

The agent is engaged in a voice call. If available the Customer name displays.

The duration of the call and an option to monitor the call appear.

Monitor an Agent Voice Call

Follow the steps to view Agent conversations listed above.

Find a voice call you wish to monitor in an agent's details.

Select the Monitor option in the call details.

Reports > Teams

The screenshot shows the 'Teams' report interface. At the top, there's a navigation bar with 'Reports > Teams'. Below it, there are two main sections. The first section is for 'Development and Construction' and is currently on the 'Agents' tab. It displays a table with columns: Name, Status, Time in state, Total handled, Total missed, Voice, Email, Messaging, and Webchat. The first row shows 'A Doyle' with a 'Busy' status, 00:33 time in state, 5 total handled, 0 total missed, 2 voice calls, 2 emails, 0 messages, and 1 webchat. Below this table is a detailed view for a 'Voice' call with a duration of 00:34 and a state of 'Active'. A 'Monitor' button is visible next to the 'Active' state. The second section is for 'Estate Management' and is on the 'Overview' tab. It shows a dashboard with six metrics: Agents Logged In (1), Agents Busy (1), Agents On Break (0), Agents Available (0), Tasks Handled (5), and Tasks Missed (0).

After a few moments a Monitored-conversation window opens on top of your view of the Teams report.

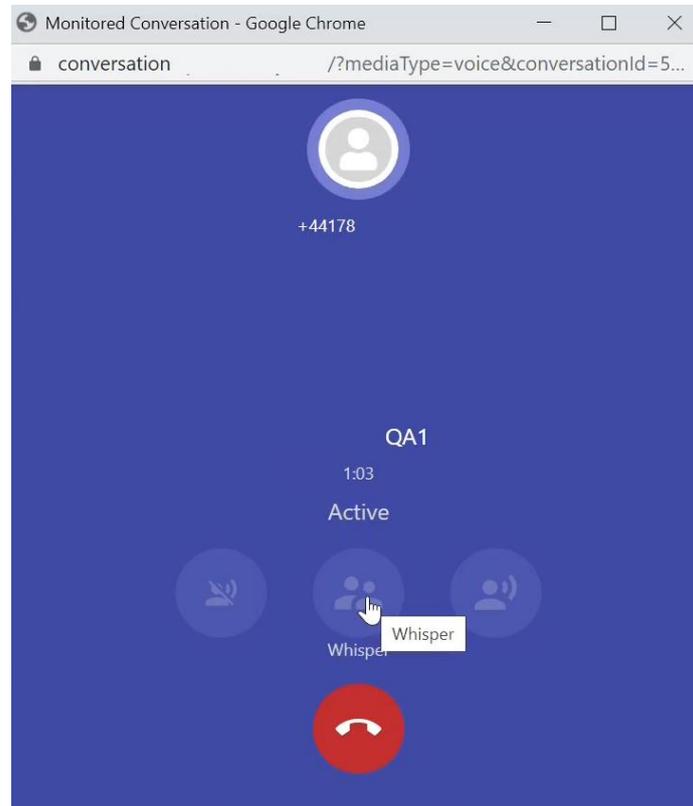
This screenshot shows the 'Monitored Conversation' window overlaid on the Teams report. The window is titled 'Monitored Conversation - Google Chrome' and has a URL bar showing 'conversation-/?mediaType=voice&conversationId=5...'. The window content is a dark blue interface with a white profile icon at the top, followed by the phone number '+44178'. Below the number, it says '0:50' and 'Active'. There are three circular icons in the middle: a microphone, a person, and a person with a speech bubble. At the bottom, there is a large red button with a white telephone handset icon, which is used to end the monitored conversation. The background shows the same Teams report interface as in the previous screenshot, but it is dimmed.

You will be monitoring the call at this point. The customer and the agent cannot hear you.

Use Whisper Feature

Use the Whisper feature to mentor an agent in a call. Only the agent will be able to hear you. You can advise the agent in how to handle the call.

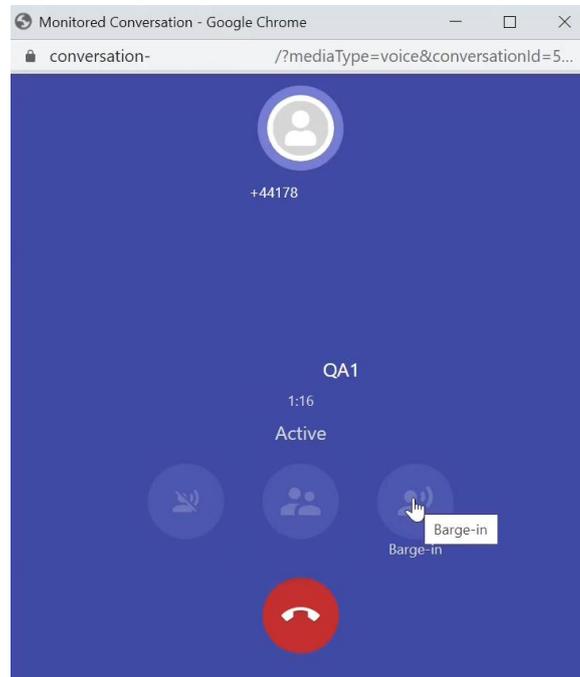
The Whisper feature's name indicates that the customer cannot hear you.



Select the Whisper button to Whisper to the agent.

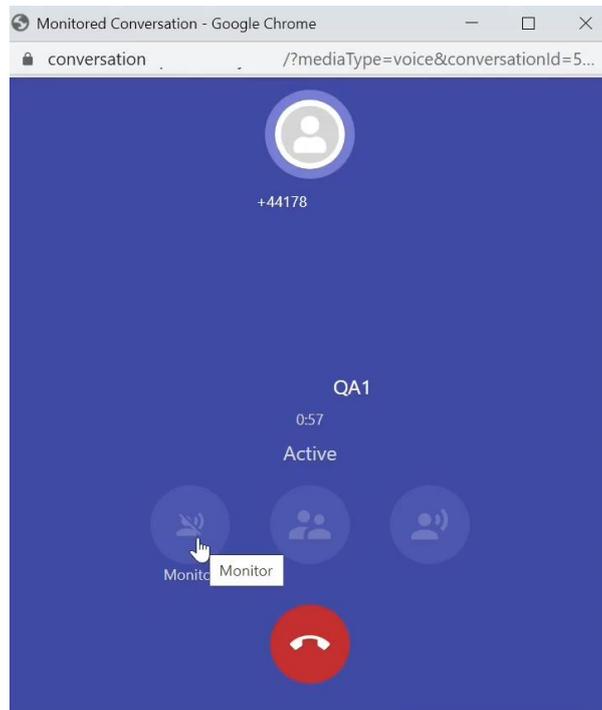
Use Barge-In Feature

Use the Barge in feature to speak with both Customer and Agent.



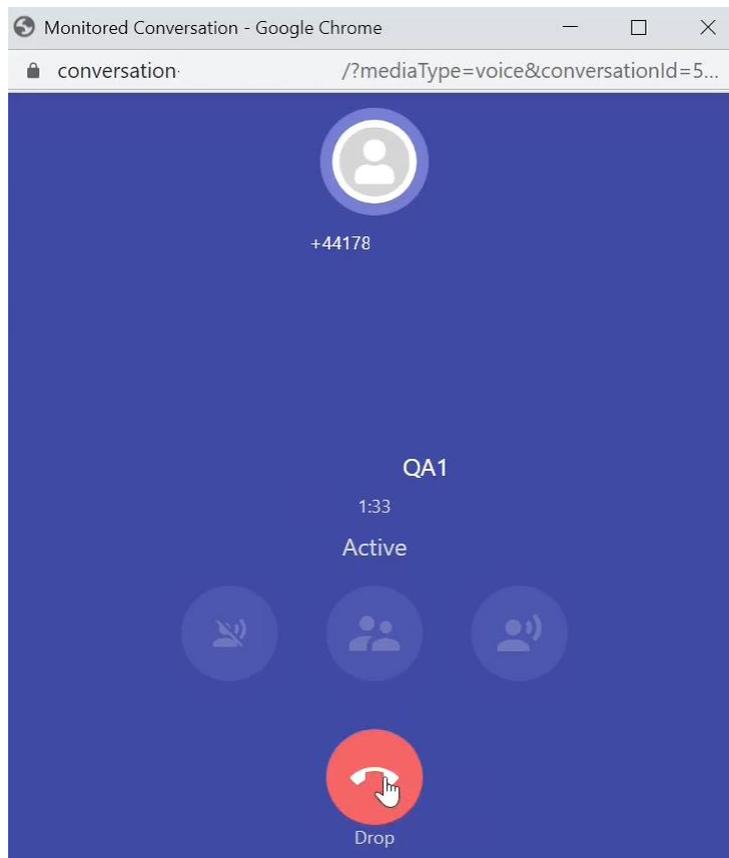
Return to Monitor From Whisper or Barge-In

While using the Whisper or Barge-In feature, select the Monitor button to return to listening to a call. The customer and agent will not be able to hear your voice.



Stop Monitoring an Agent Call

Select the Drop button to stop monitoring a call.



You will leave the call. The Agent conversation with the Customer will continue.

Close the Monitored Conversation Window.

Bot Reports

The Bot reports consists of dashboards of KPI data.

A bot dashboard displays data for your entire tenant, showing data specific to the Bot Steps used within your workflows. If your bot has not been used today, it will not show up in this dashboard.

Select Bots under the Reports heading in the portal sidebar to display the Bots Report.

Key KPIs for Bot reports

The following KPIs are available for the Bot reports providing you with a quick overview over the automated messages your workflows are using.

- Success Rate % -- Displays the percentage of successful customer interactions with a bot for today. A successful interaction is considered when the Bot is finished and all conditions are met, such as validation rules or menu selections.
- Processing -- Displays the count of interactions a specific bot is currently handling. Note that the customer could be at any of the question asked by your bot.
- Completed -- Displays the count of successful customer interactions with a bot for today.
- Abandoned -- Displays the count of customer disconnects while in a conversation with a bot for today.
- Failed -- Display the count of customer failures while in a conversation with a bot. A customer might fail to provide a valid answer in case of Data collection, fail to press a key in the given period, etc. This is also referred to as BotFailed in other areas of the product, such as the legacy portal.

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