A MITEL
PRODUCT
GUIDE

Unify OpenScape Contact Center V11R1

Supervisor V11R1

Supervisor

User Guide
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Notices

Trademarks

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1 Brief Introduction

Contact center managers are constantly on the move and need to monitor their contact center operations **wherever they are** - at home, in the car, at work, at lunch.

Supervisor is an application for mobile devices and web browsers that assists with the effective management of OpenScape Contact Center by providing useful **real-time** information regarding the contact center and its agents. The mobile application is called **Mobile Supervisor** and the web-based **Web Supervisor**.

Mobile Supervisor supports **Android** and **iOS** devices including mobile phones and tablets. The following operating system versions are required in order to install Mobile Supervisor to your device:

- Android 4.4 and 5.1 up to 7.0
- iOS 8.x, 9.x and 11.x

1.1 Supervisor features

What you can do with the Supervisor:

Monitor and control all of the important aspects of your contact center, including:

- Agent status and individual agent details such as their routing state, media used, handled contacts etc.
- Queue status and individual queue details such as average wait time, number of deflected calls etc.
- Change the routing state of an agent (e.g. from unavailable to logged off)
- View all available skills/groups for each agent and edit them.

2 Log in to Mobile Supervisor

2.1 Server address screen

The first time you open the application you are presented with the **Server address** screen.

1. In the **Server address** field type in the OSCC server hostname/IP address using the following format:

   - `https://<oscc_hostname>/osccwebservice`

   or

   - `https://<oscc_ip>/osccwebservice`

   Note: You may need to mark the **Allow invalid Certificates** checkbox before proceeding to the next step. For more information please contact your system administrator.

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2. Click **CONNECT**.

2.2 Login screen

After you have configured the **Server address**, the **Login** screen will be the first screen displayed when you open the application from then on.

1. In the **Tenant** field, type in the name of the **Business unit** you wish to be connected to.
2. Type in your username in the **Username** field.
3. Type in your password in the **Password** field.
4. Tap on **SIGN IN**.

Note: If you wish to change the OSCC server hostname or IP address, tap on the network icon located on the upper right corner of your screen and follow the instructions in Section 2.1, “Server address screen”.

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3 Web Supervisor

Web Supervisor is a web based application that has additional functionalities compared with the Mobile Supervisor application and is accessible via the OSCC Application Server service.

The user starts the application by using the Google Chrome web browser and entering the URI, for example:

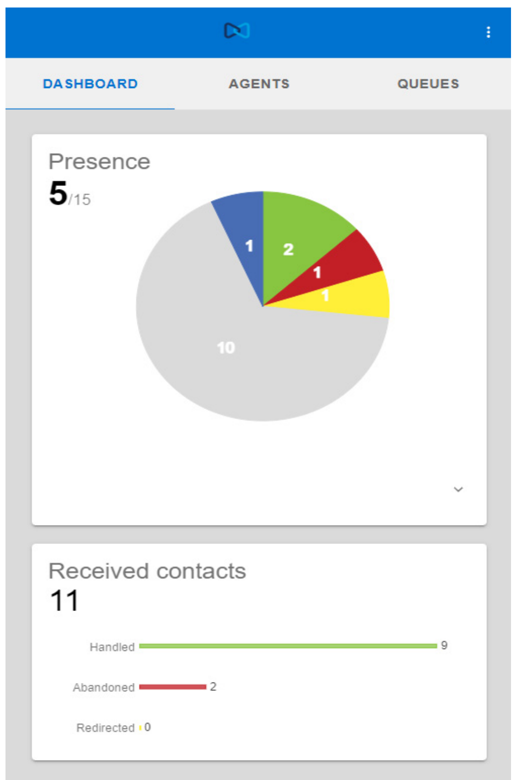
```
https://<IP-ADDRESS-OR-FQDN>/supervisor
```

4 Individual tab details

The following sections describe the functionality of Mobile Supervisor after you log in to the Contact Center server.

4.1 Dashboard tab

The **Dashboard** tab is the main screen of Mobile Supervisor. In this tab you are provided with a quick overview of the contact center's business unit in the form of cards.



Dashboard tab on Android (left) and iOS (right).

The first card called **Presence** displays the number of logged in agents and breaks it down using a pie chart according to their presence state. By clicking on the arrow in the bottom of the card, the pie chart legend is displayed.

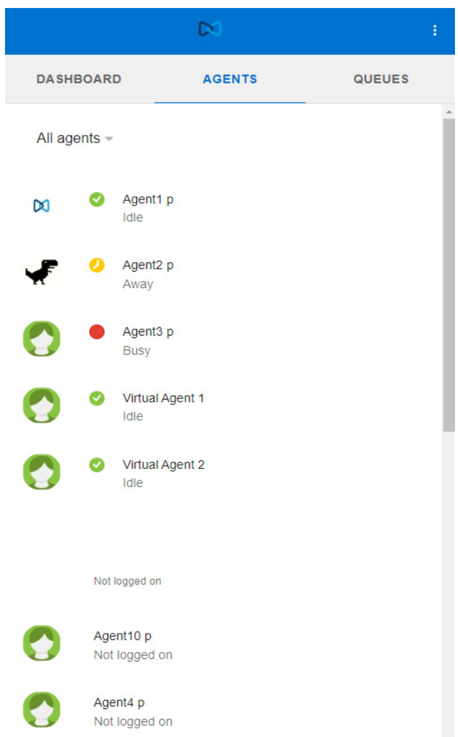
The second card is called **Received contacts** and displays the total number of received contacts by the contact center's business unit. It also lists which of those contacts were handled successfully, abandoned or redirected in a graph chart.

4.2 Agents tab

The **Agents** tab lists all agents under your supervision and separates them in two main categories:

- Logged on
- Not logged on

Note: The logged on agents are listed first.



Agents tab on Android (left) and iOS (right).

By default the agents of **all teams** monitored by you are displayed. You can however change it to display the agents of the team of your choice:

1. Tap on the **All agents** button.
2. In the pop up dialog select the team you wish.
3. Tap **OK**.

4.2.1 Agent information

To display more information regarding an agent you simply need to tap on their name. The new screen that is displayed has the following tabs:

Details tab

On this tab you can find details for an agent such as their ID and their team, their routing state, their presence state, and more.

You also have the ability to edit the following entries:

- Routing state of the agent
  a) Tap on the **EDIT** button next to the Routing state.
  b) Select the routing state of your choice.
  c) Tap **SAVE**.
- Skills or Groups of the agent

  Note: Depending on the system’s routing configuration the corresponding entry (Skills/Groups) will be displayed.

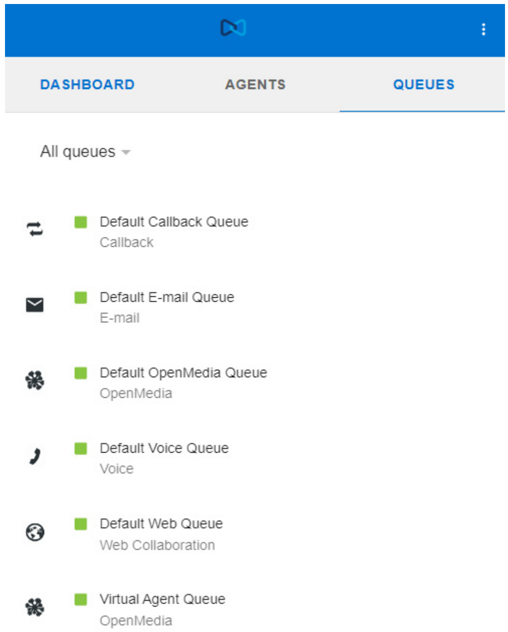
  a) Tap on the **EDIT** button next to the Skills field.
  b) Select the skills you wish to add/remove.
  c) Tap **SAVE**.

Active Contacts tab

In this tab more details regarding the contact(s) that the agent is handling at the time are displayed, such as the media used, the state of the contact and the handling time.

4.3 Queues tab

The **Queues** tab lists all queues under your supervision. By default all queues are displayed but you can filter them by media type if you wish.



Queues tab on Android (left) and iOS (right).

How to filter displayed queues:

1. Tap on the **All queues** button.
2. In the pop up dialog select the media type you wish.
3. Tap **OK**.

How to check queue information:

1. Tap on one of the listed queues.
2. The queue information screen is displayed.

The following parameters are presented for each queue:

- Name: queue name
- Queued: number of waiting agents in the queue

- Logged on Agents: number of logged on agents in the queue
- Idle Agents: number of idle agents in the queue
- Service Level: the service level defines the color of the status as follows:
  - Green: Greater than or equal to 60 and less than or equal to 100
  - Yellow: Greater than or equal to 30 and less than 60
  - Red: less than 30
- Accessibility (Answer Rate): The percentage of the last 24 answered contacts routed to this queue.
- Deflect (Redirected): The number of contacts received in this queue that were redirected.

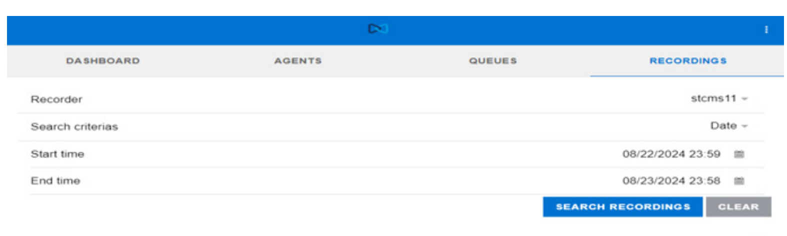
4.4 Recordings tab

The Recordings tab allows you to search for recording contacts, download them or listen to them.

The Recorder feature is only available for Mobile Supervisor via Web Browser only works on the Web Supervisor. You can access the application through the following url:

`https://<oscc_app_server_address>/supervisor`

Note: The supervisor user configured in OSCC must have the "Search recordings" permission setup through the Manager application. When the Supervisor does not have permission to access the recorded contacts, the Recordings tab will not be available in the Web Supervisor.



How to search for Recordings

Note: The Search Recordings functionality requires configuration changes in the Application Server Configuration Center. For more information, refer to the chapter "Application Server" chapter in the *OpenScape Contact Center Enterprise V11 R1, OpenScape Contact Media Service Recording* user guide.

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1. Click the **RECORDINGS** tab
2. Configure the following parameters:
   1. **Recorder**: Select the recorder machine on which to search
   2. **Search criteria**: Perform the search on the following parameters:
      - **Date**: Select all recordings for the date interval, by selecting the **Start Time** and the **End Time**
      - **Extension**: Select from a list of Extensions
      - **Agent Id**: Select from a list of Agent Ids

      Note: You can only select agents you are able to monitor

      - **Agent name**: Select from a list of Agent names

      Note: You can only select agents you are able to monitor

      - **Queue name**: Select from a list of Queue names

      Note: You can only select queues you are able to monitor

      - **ANI**: Search for an ANI
      - **DNIS**: Search for a DNIS
   3. **Start time**: The start time of the search interval.
   4. **End time**: The end time of the search interval

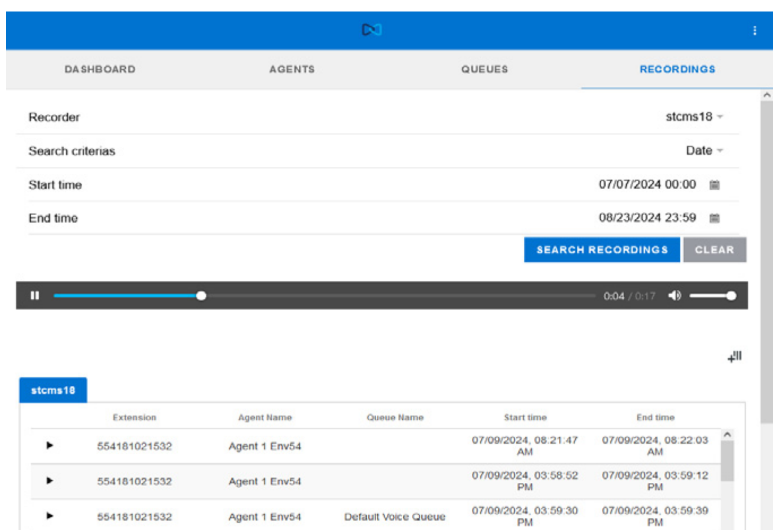
   Note: You can select any combination of the parameters

3. Click **SEARCH RECORDINGS.** A list of the recordings appears, depending on your search criteria

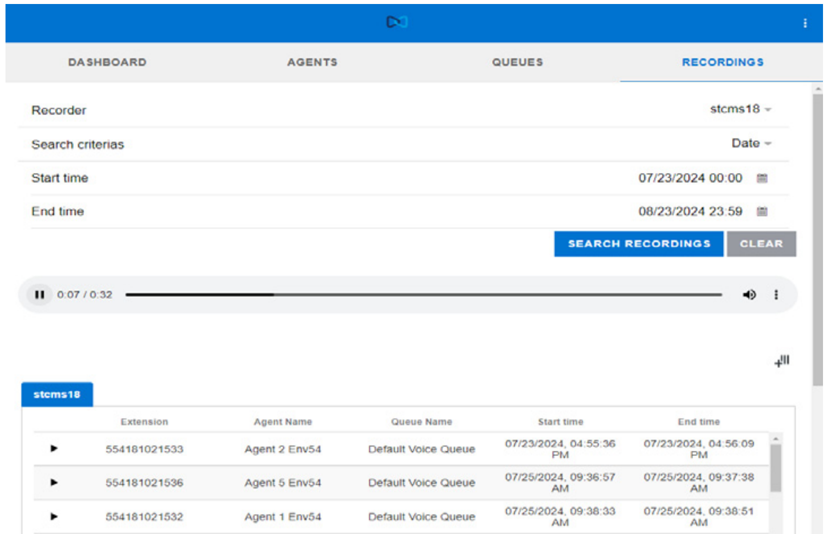
4. For each of the found recording, you can select the following parameters to appear on the list:
   - Recording id
   - Extension (Presented by Default)
   - Agent name (Presented by Default)
   - Agent ID
   - Queue name (Presented by Default)
   - Start time (Presented by Default)
   - End time (Presented by Default)
   - ANI
   - DNIS
5. You can listen or download the recorded calls you searched for.

   To play a recorded call, click on the play icon on the left side of the call you would like to listen. An audio bar is present on the screen, allowing you to start and stop listening to the call.

   This is the screen in the Mozilla Firefox browser:

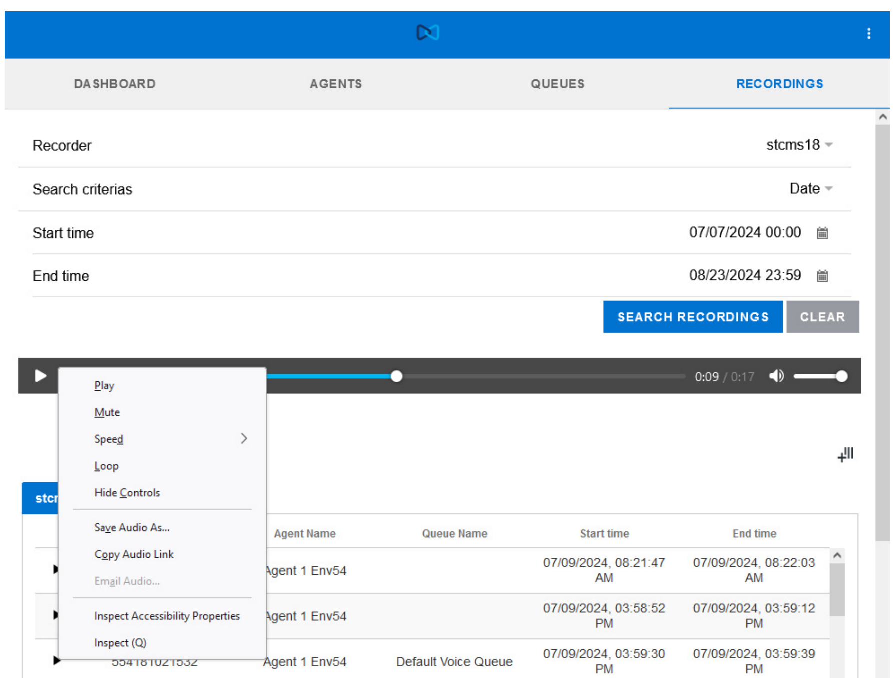


   This is the screen in the Google Chrome browser:

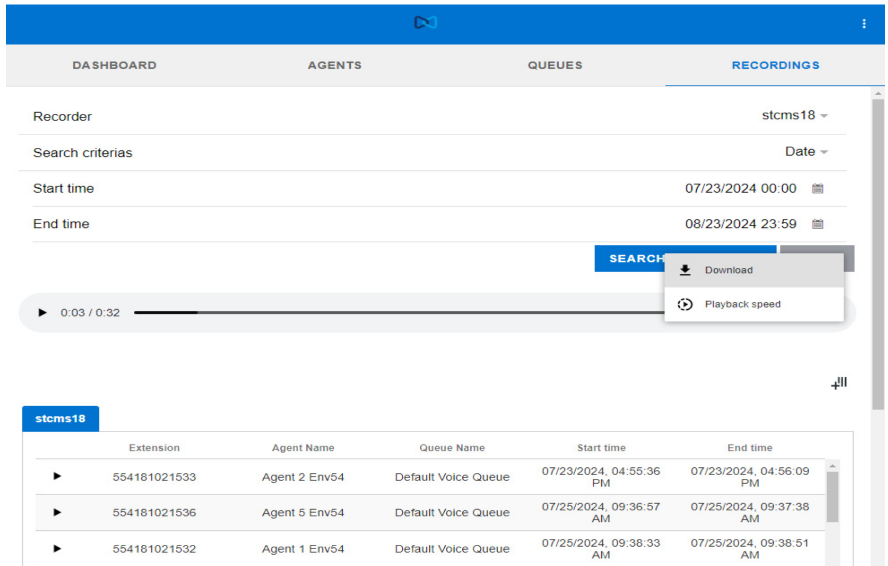


Downloading the call recording file is different between Mozilla Firefox and Google Chrome.

1. In Mozilla Firefox, right-click the audio bar. A menu appears with several options.
2. Click **Save Audio As...** and choose the destination folder to download the file



1. In Google Chrome, click the three vertical dots on the right side of the screen. The **Download** option appears.
2. Click **Download** and choose the destination folder to save the file



6. Click **CLEAR** to delete your selections.

4.5 Skills tab

Web Supervisor's **Skills** tab allows supervisors to enable/disable multiple skills for multiple agents at once, as well as bulk change their skill level and preference.

Supervisors can also import and export a list of users skills to an external file in CSV format. This way a supervisor can, for example, export a group of users to a file, edit that file externally and later import it back to the system.

Note: For the Web Supervisor to display the **Skills** tab, perform the following two configurations:
- System routing strategy must be configured as **Skills-based Routing**. For details on how to configure it, see chapter **Changing to skills-based routing** of the *Manager Administration Guide*
- Web Supervisor users must have 'Skills' permission in 'Read Only', 'Modify' or 'Full' state.

4.5.1 Permissions Level

When configuring 'Skills' user permission to 'Read Only' state, Web Supervisor displays the **Skills** tab but you are not able to modify them. When configuring 'Skills' user permission to either 'Modify' or 'Full' state, the Web Supervisor displays the **Skills** tab and you are allowed to modify them (for example, enabling or disabling a skill, etc).

For details on how to configure it, see chapter **Configuring the user permissions** of the *Manager Administration Guide*.

4.5.2 Skill Level and Preference

Web Supervisor also supports both skill level and preference features. When they are enabled (at the system level), Web Supervisor displays an extra view which supervisors can change agents skill levels and preferences. For detailed information on how to configure skill level, see chapter **Displaying skill levels** of the *Manager Administration Guide*. For skill preferences details, see chapter **Displaying skill preferences** of the *Manager Administration Guide*.

4.5.3 Filters

When managing users' skills it can be difficult to find a specific user, when there is a large number of users.To make searches easier, Web Supervisor provides three different filters. These filters are:

1. **Filter by agent name**: Type an agent name in the **Agent Filter** field. Agents that contain the typed text in their name, are displayed in the grid.
2. **Filter by teams**: Web Supervisor takes advantage of the 'Department' feature, where users can be grouped into teams. All existing teams (configured through the Manager application) are available, so supervisors can pick up one and only those agents that are grouped in the selected team are displayed in the grid.
3. **Filter by skill**: You can filter users by their current skill. When a skill is selected, all agents with that skill are displayed in the grid.

All these three filters can be combined together.

4.5.4 Enabling/Disabling Skills

Web Supervisor's **Skill** tab contains a list, where all monitored agents are displayed. Each line represents one agent, whereas each column represents each skill configured in the system. Each call contains a check-box control under the skills columns.

To enable a certain skill for a certain agent, click the check-box corresponding to the agent and skill. To disable a skill for an agent, uncheck the check-box.

You can change multiple agents at once by following the steps below:

1. Select which agents you need to change by clicking on the check-box before the agent's name in the first column.
2. Click **Select Skills**. A dialog is displayed allowing you to enable/disable any skill for the selected agent(s). To enable all skills for the selected agents, just click **Select all**. To disable all skills, click **Clear all**.
3. Click **Apply** to save your changes. All changes will be propagated down to the grid.

The main grid shows up to 25 agents per page. When the system contains more than 25 agents, you can access them by using the pagination buttons at the bottom of the grid.

4.5.5 Changing Level and Preference

Similar to enable/disable skills, Web Supervisor shows another view where it is possible to change a certain skill level and/or preference for a certain agent or for multiple agents. To display this view, follow the steps below:

1. Select **Show Level and Preference**

   > **Note:** Skill level and/or preference must be enabled through Manager application to enable this option.

2. When you have selected this view, you can click on each cell individually to enable the edit mode.
3. Select the level and preference level (from 1 to 9) in the appropriated controls and click out of the edit area (or just click on tab key).

4. To change skill level and preference for multiple agents, select which agents need to be changed by clicking on the check-box right before the agent's name (in the first column)
5. Click **Edit Level/Preference**. A dialog is displayed allowing skill level and preference changes for the selected agent(s).
6. Click **Apply** to save your changes. All changes will be propagated down to the main grid.

4.5.6 Saving changes into the Database

Whenever a modification is done (either enabling/disabling a skill or changing a level and/or a preference), the changes are applied only at the GUI level. Changes can be applied multiple times before saved on the server.

After performing all changes, click **Save** on the top right corner. After confirming it, changes are persisted into the production system and take effect immediately. To cancel changes done in the GUI, click on the **Reset** on the top right corner.

4.5.7 Import/Export

You can export a list of agents’ skills to an external CSV file. This allows you to externally modify a file (using a spreadsheet application, a text editor, etc) and then, import it back into the system.

You can export all users skills or just a set of users. To export the entire user's list:

1. Ensure no filter is active
2. Click **Export to File** (at the top left corner).
3. To export a group of agents, you can use any of the three available filters to filter out agents
4. Click **Export to File** (at the top left corner).

Note: When using filters, only those agents that are being displayed on the grid will be exported.

To import a file:

1. Click **Import from File**
2. Choose a local CSV file. When no errors are found in the file, all content will be displayed on the grid (at GUI level).
3. To apply the changes on the server, click **Save**.
4. After confirming it, all changes imported from the CSV file will be integrated into the production system and take effect immediately.
5. To cancel the data imported form the file, click **Reset** on the top right corner.

Note: When exporting data to a CSV file, it will contain some metadata that cannot be removed when editing it. You are allowed to only modify skills (enabling or disabling them for agents) as well as changing their level and preferences. Any other changes, can corrupt the file. If the system detects a corrupted file during the importing process, the process will entire fail and a popup will be displayed with a hint to narrow down where the error is (ex. level or preference out of the allowed boundaries, invalid character, etc). When this is the case, you can go back to the external file, fix all errors and then repeat the importing process.
