SmartAgent User Guide

Supervisor Guide

Starting your **Smart**Agent Journey

Version	**Date**	**Author**	**Changes**
2.85	14/05/24	Paul Egan	MPC Timings

Introduction

The purpose of this guide is to provide you with an introduction to using SmartAgent for contact management as a Supervisor.

We recommend attending an Agent session or watching a video of the Agent training for your organisation so you can be clear on logging in etc to support your team.

There are different levels of access and depending on your role some of the settings on display in this guide may not have been enabled for your system or for your access level.

Your Project leaders will provide guidance on which features have been enabled for your organisation.

Pre-requisites for this training

To successfully complete this **Smartagent - Supervisor User guide** you will require the following:

1. Access to a workstation
2. Access to the internet
3. **Google Chrome or Microsoft Edge browser**
4. A suitable headset, preferably a USB one
5. Your SmartAgent username and Password or sign-in credentials
6. A mobile phone / external phone to use in simulating a call
7. Confirmed that at least 2 users have logged into the UAT Environment and are available for the training session at the scheduled time

Duration of this training

Whilst the first time we run through this training we would anticipate their being some additional questions around rollout and procedural changes, under normal conditions we would expect that this session would typically be run within **30 Minutes**.

Who Should attend this training?

This training is for anyone using SmartAgent who will have Supervisor access on the SmartAgent system. We recommend that they have attended an Agent Training session as well.

Agenda

Module 1 Managing Service levels in SmartAgent

- Queue Metrics
- Agent Metrics
- Changing routing profiles and Status of agents
- Wallboards

Module 2: Agent & Contact Support

- Live Monitoring
- Call Barging
- Hand Up
- User management
- Announcements
- Business Continuity
- Welcome Messaging
- Audio settings

Module 3: Historic data

- Call recordings and CTR data in SmartAgent
- Historic reports in Connect- Queues
- Historic reports in Connect –Agents

Module 4: Optional extras

- Queued tasks
- QA – using a Contact Evaluation form

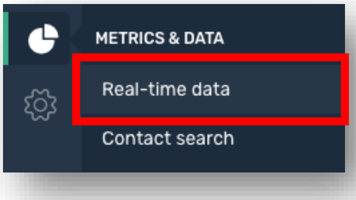
Module 1: Managing Service levels in SmartAgent

By the end of this module, you will be able to:

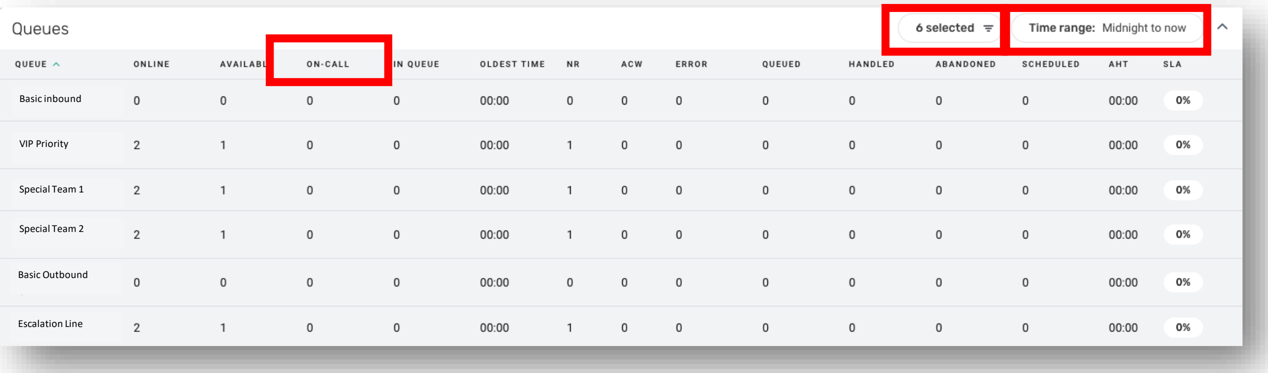
- Understand Queue real-time metrics
- Understand Agent real-time metrics
- Change active agents routing profile and status
- Wallboards

Queue Real-time metrics

Real-time queue data can be accessed by clicking the Metrics & Data icon in the left-hand menu and selecting Real-time data.



At the top of the page you will see a list of all queues.


Queues
6 selected
Time range: Midnight to now

QUEUE	ONLINE	AVAILABL	ON-CALL	IN QUEUE	OLDEST TIME	NR	ACW	ERROR	QUEUED	HANDLED	ABANDONED	SCHEDULED	AHT	SLA
Basic inbound	0	0	0	0	00:00	0	0	0	0	0	0	0	00:00	0%
VIP Priority	2	1	0	0	00:00	1	0	0	0	0	0	0	00:00	0%
Special Team 1	2	1	0	0	00:00	1	0	0	0	0	0	0	00:00	0%
Special Team 2	2	1	0	0	00:00	1	0	0	0	0	0	0	00:00	0%
Basic Outbound	0	0	0	0	00:00	0	0	0	0	0	0	0	00:00	0%
Escalation Line	2	1	0	0	00:00	1	0	0	0	0	0	0	00:00	0%

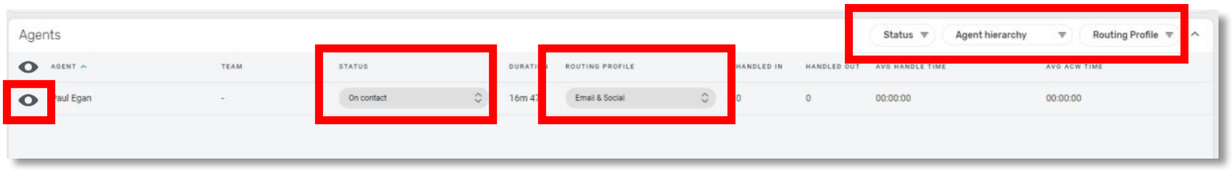
You can filter which Queues report onscreen using the filter icon and change the sorting order by clicking on the column headers.

You can also select a different time range - the default is Midnight to now

Agents Realtime Metrics

Below the Queue data on the real-time data screen you will also see a list of agents currently in an active state.

On this page you can see the agents's current status, the routing profile they currently have and some indicative data on their performance in the time period selected.



You can filter this list of Agents by their current status, Agent Hierarchy and routing profile.

Changing Agent Status and Routing Profile

From this screen you can amend an agent's status remotely if required by selecting one of the status codes from the dropdown menu against the agents name.

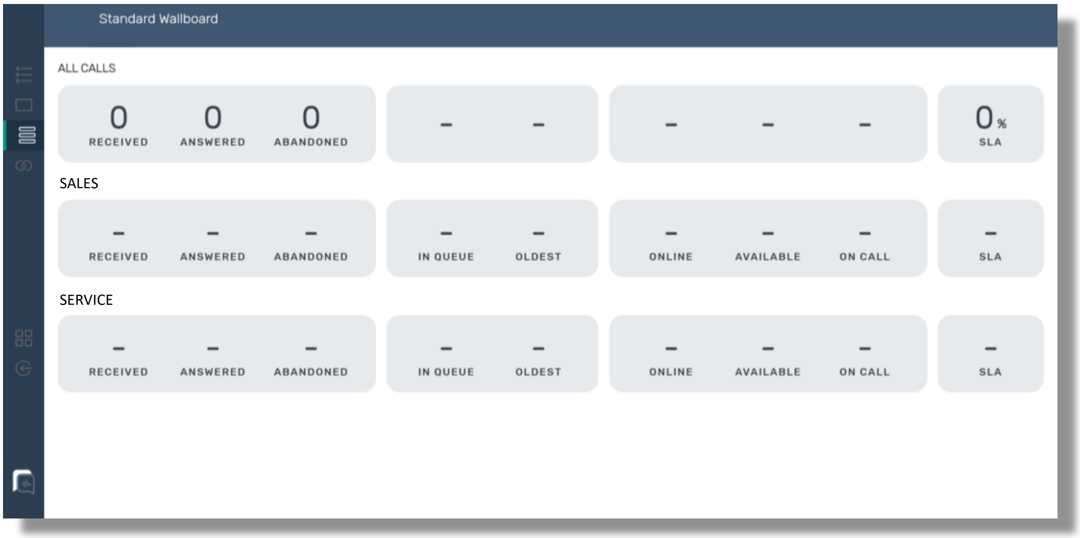
You can also change which Routing profile they have by selecting another existing routing profile from the dropdown menu.

If you need to create a new routing profile, then you will need to be an admin on the system to have access to create those.

This is also the screen where you can live monitor contacts made by your team by clicking on the Eye icon which will appear when an Agent is on a live contact.

Wallboards

If your organization has enabled wallboards you will be given an additional URL link to a wallboard which can be shown onscreen to help manage service levels.



The wallboard will change colour from Red to amber to green within agreed parameters and will display specified call stats.

The menu on the left hand side offers a range of different views of the information and the option to access further wallboards if they have been configured.

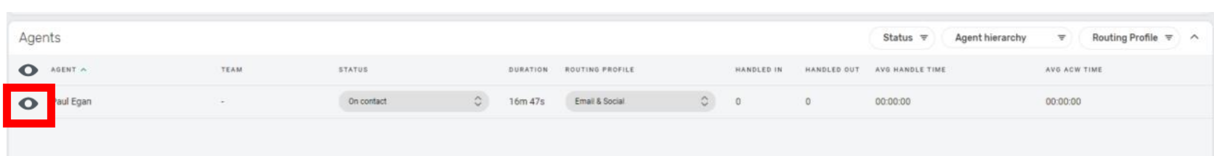
Module 2: Agent & Contact support

By the end of this module, you will be able to:

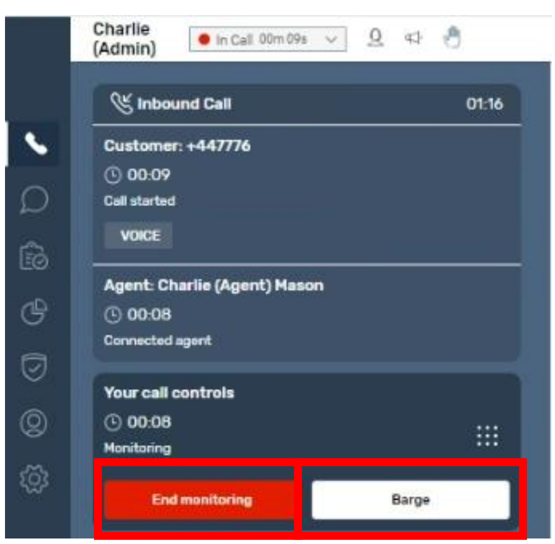
- Live Monitor voice calls
- Call barging on voice calls
- Acknowledge a hands up request
- User management for all Agents
- Create an announcement message to Agents
- Use Business Continuity function to switch off lines
- Use Welcome Messaging to change a Queue message
- Use the Audio settings

Live Monitoring a voice call

As a supervisor from the Real-time data screen you can also live monitor a voice call. Any agents that are "on contact" will have the "Eye" symbol next to their details. If you select the eye icon you will enter live monitoring. The Agent & Customer will not be aware you are listening in but you can hear both sides of the conversation.

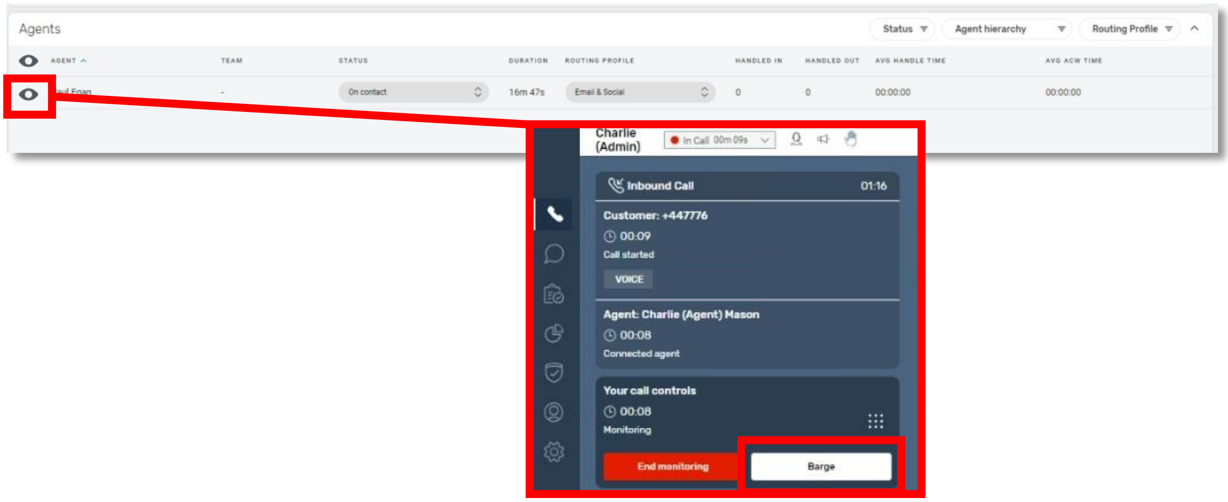


Once in the monitoring screen you can select "End Monitoring" or the "barge" option if you need to take control of the call.



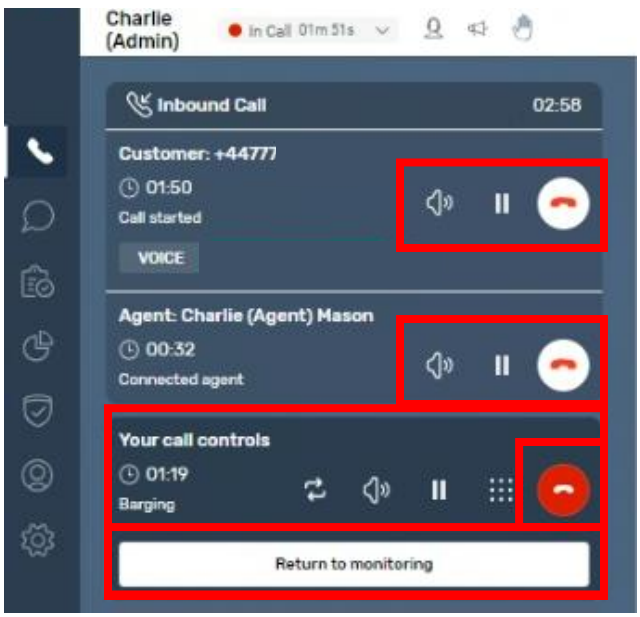
“Barging” into a call

In order to barge into a call as a Supervisor you must go to real time metrics screen and go into Live monitoring mode on the Agent on a call. You will then have the option to “Barge” into the call.



Barging will add you as an active participant on the call. The Agent will see you join the call onscreen with a tag of “barging” but the customer will not be aware unless you introduce yourself.

You will be able to control the call, mute the agent or customer, put them on hold or remove a party from the call. You can choose the “End monitoring” button if you no longer need to listen into the call – or select the “Return to monitoring “ button which will return you back to silent monitoring without access to call controls.

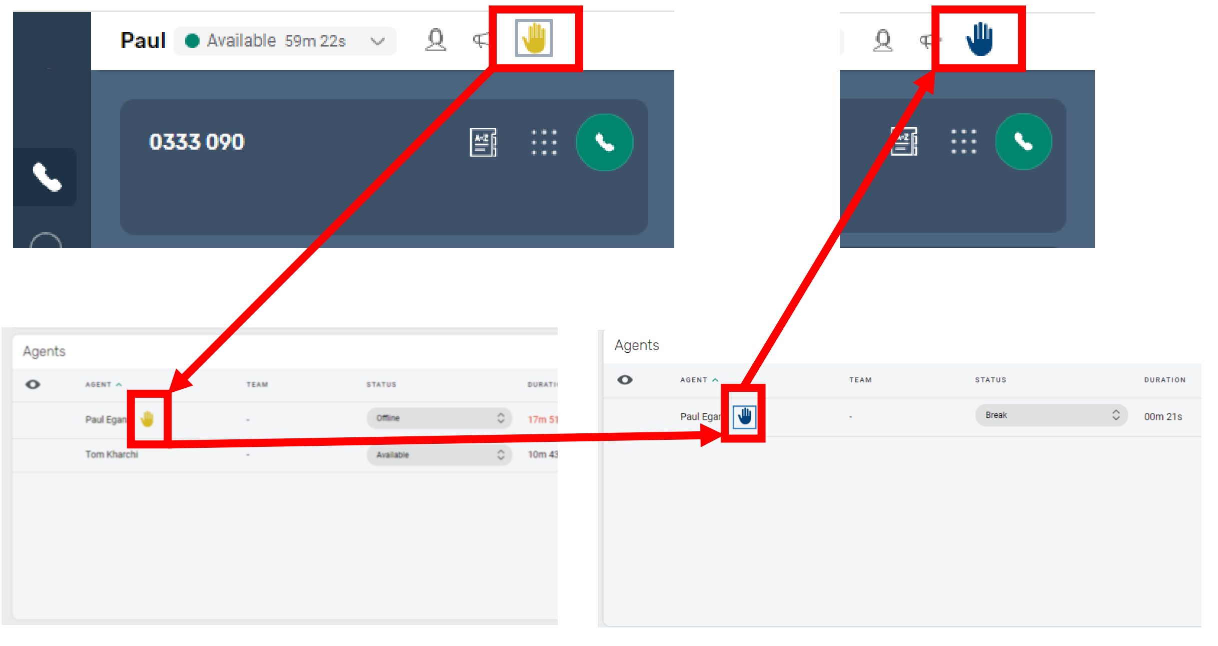


Acknowledge hands up request

If the “Hand Up” feature has been enabled for your organization than an agent can click on the hand signal near the top of the screen.

This will turn yellow, indicating they require assistance. If this has been done in error the agent can switch the alert off by clicking the hand again.

Supervisors will be able to see any “Hand Up” alerts on the Realtime Data screen Agents section.



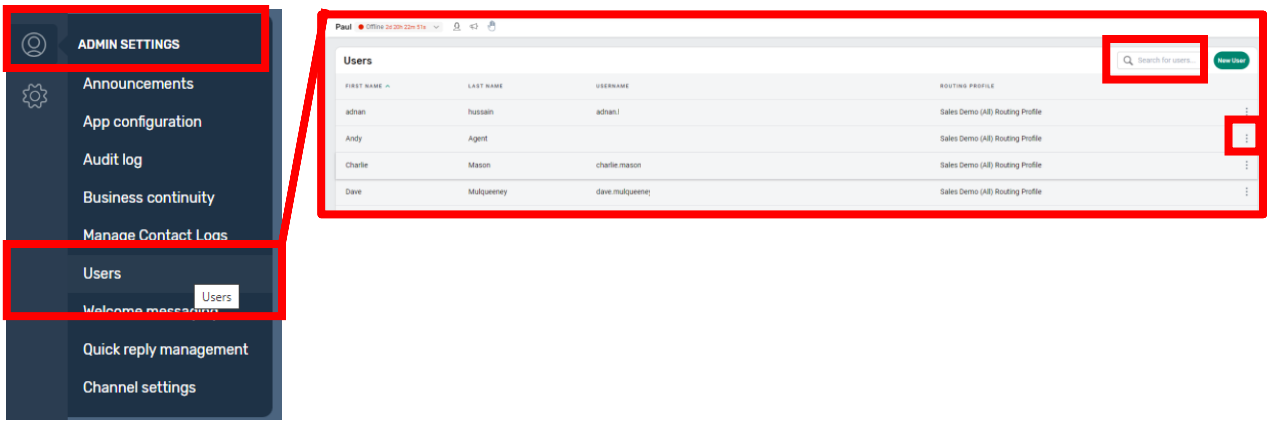
If a Supervisor clicks on a hand it’s colour will change from yellow to blue, acknowledging that it has been seen by a supervisor.

The Agent will see their Hand up change colour on their screen and know that help or assistance is on the way.

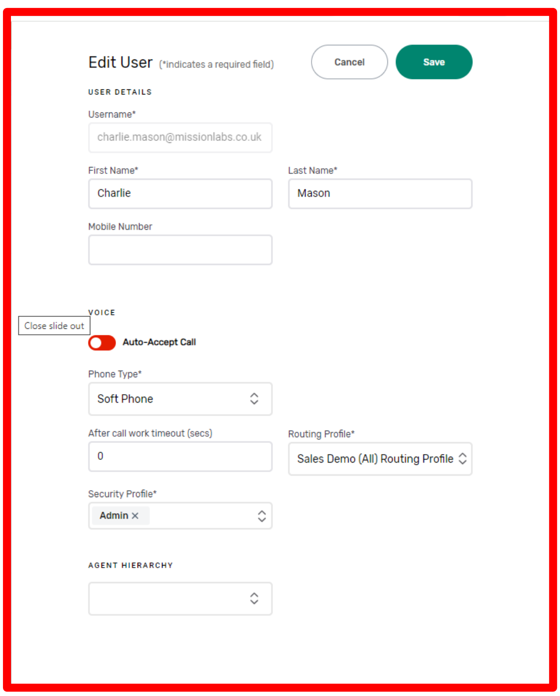
User management for All agents

An Offline agent's status or details can be changed by a supervisor in SmartAgent.

Go to "Admin Settings" Menu and select "Users"



This will bring up a list of all users – you can search for users or scroll manually across the list of current users. If you select the three dots to the right of the user name you can disable or delete that user. If you select the particular user you can then amend their details as required.

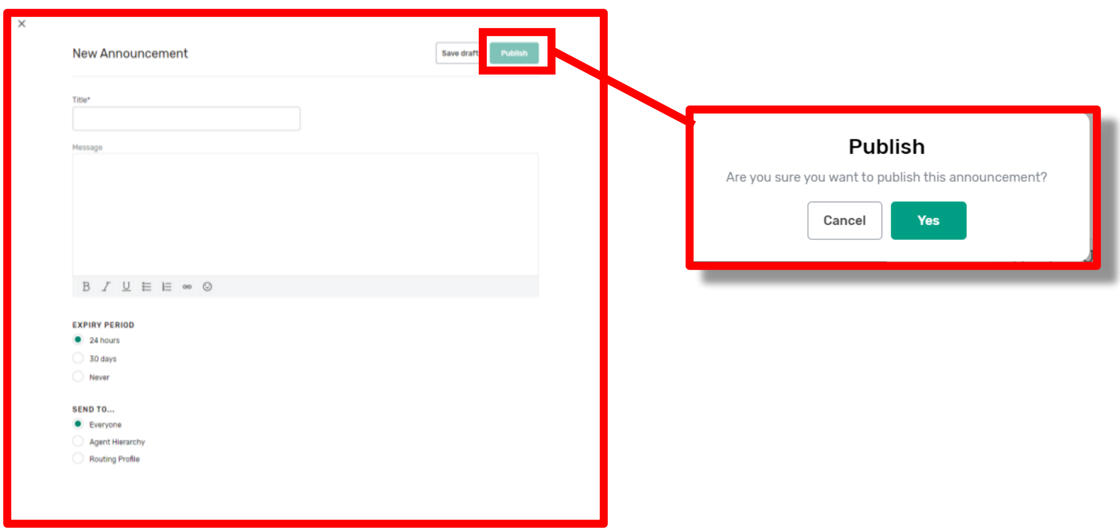


If you want to make a large number of changes to users then getting an admin to do this in Connect via a csv upload may be a preferable option.

Create and Editing an Announcement

If you have the access in your security profile you will be able to create and edit announcements by going to “Admin Settings” on the left hand menu and selecting “Announcements” This will take you to a screen where you can see any current or draft announcements and can create a new announcement.

When you create a new announcement you need to give it a unique title and then input the message details, which can contain hyperlinks if needed. You then must input an expiry period and choose an option of who to send it to.



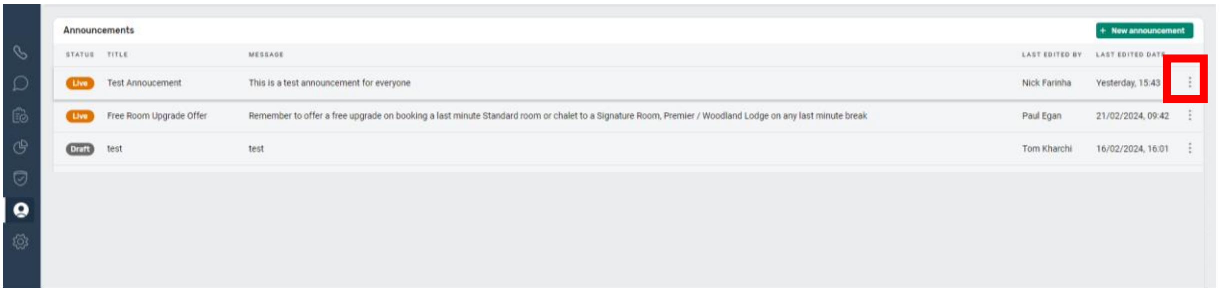
You can send it to all users, to a particular element of your Agent Hierarchy or to users with a particular routing profile.

You can then choose to save this message as a draft. This will not send out the message, but will enable it to be used as a template for other messages. You can edit an existing message from the Announcement list message by opening it, renaming it, and saving it as a further draft or publishing it.

If you choose the “publish” option, you will need to confirm you want to publish the message and it will then be sent out as you have requested.

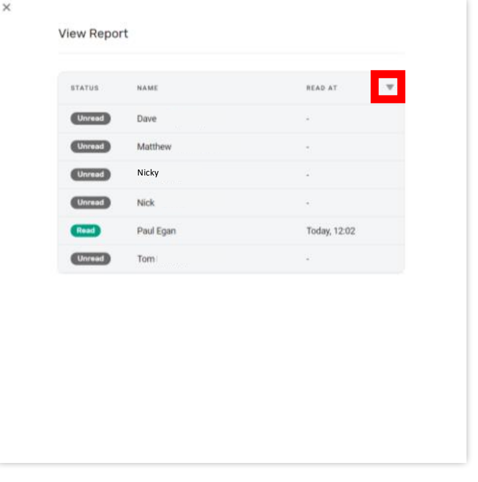
Announcement report and deletion

You can view the status of all current messages from the announcement screen and by clicking on the three dots on the right-hand side, you can edit or delete an announcement.



If you choose to delete an announcement it will be removed from all users announcement screens, even if it was setup with a “Never” expiry option.

If the message is “live” you can also choose the “View Report” option which will present you with a list of users the report was sent to. You can then use the filter option to sort the list and highlight those that have or have not yet read and acknowledged the announcement.



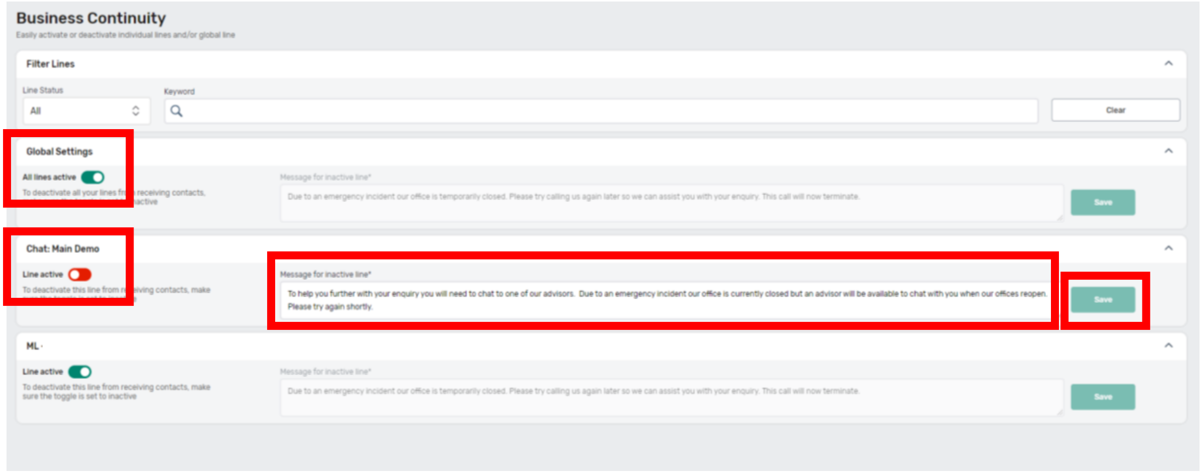
Business Continuity Settings

Whilst your admins may make changes in your systems Hours of Operation to cover planned interruptions in service, such as public holidays, in an emergency or evacuation situation it is essential that you have the tools available to make instant alterations to call routing and customer messaging.

SmartAgent provides a self-service Business Continuity screen to enable quick disabling/enabling of lines along with the ability to insert custom messaging informing callers for the reason for the calls being switched off.

If this feature has been configured for your setup and you have the access to it, you will find it in the Admin Settings menu under "Business Continuity".

Each setup will be unique, but it will usually take the form of a global Switch-off option and then a sub menu of other options which may be based around location / brands or different activity types.



If the toggle switch is green, then lines / channels are active. If however, you get an unexpected situation, you can switch them off by selecting the toggle switch, turning it to red. You can then input a specific text message that will be played to customers while the lines are switched off and select the "Save" button.

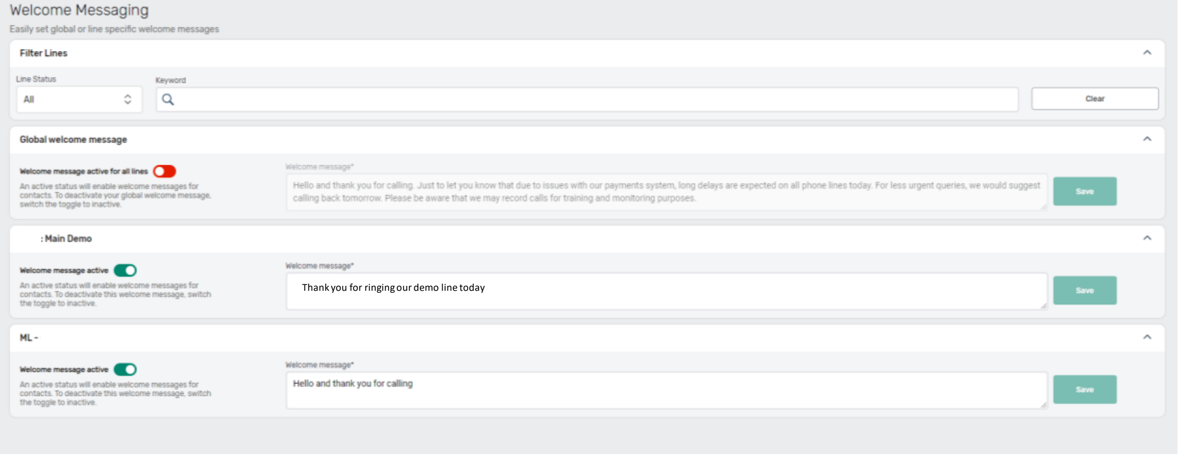
Once the emergency situation has passed you can simply toggle the switch to turn the particular grouping / activity back on again.

Welcome Messaging Settings

As part of your Organization's SmartAgent setup you will have a series of prompts and messages that are played to people in queues while they are waiting to be answered or as part of your customer journey through various menu options.

Your admins will be able to make any changes needed to these but some organisations want the ability to adapt these in the event of something unexpected happening.

If this has been setup for your organization and you have access, you will find this customized "Welcome Messaging" in the Admin Settings menu on the left.

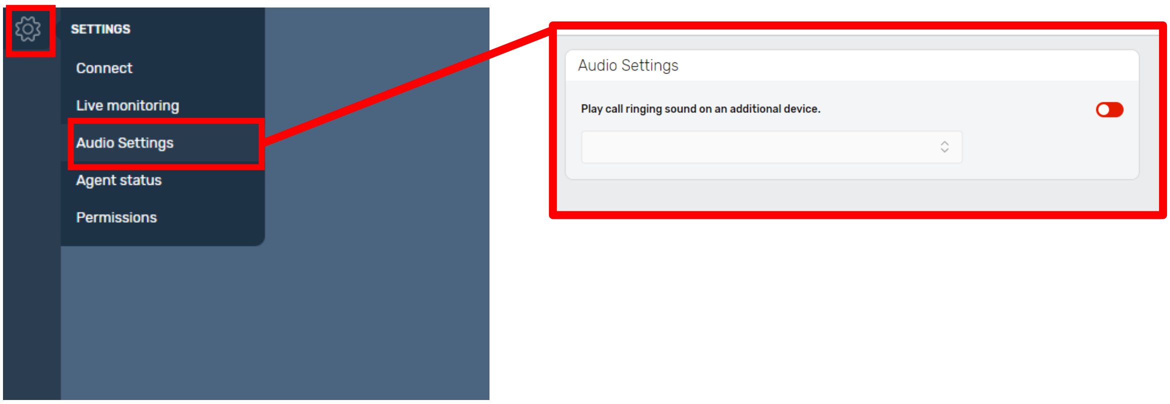


This will be unique to your organization but the setup will generally take the form of a "global message" that will be played over and above any other departmental level messages if enabled.

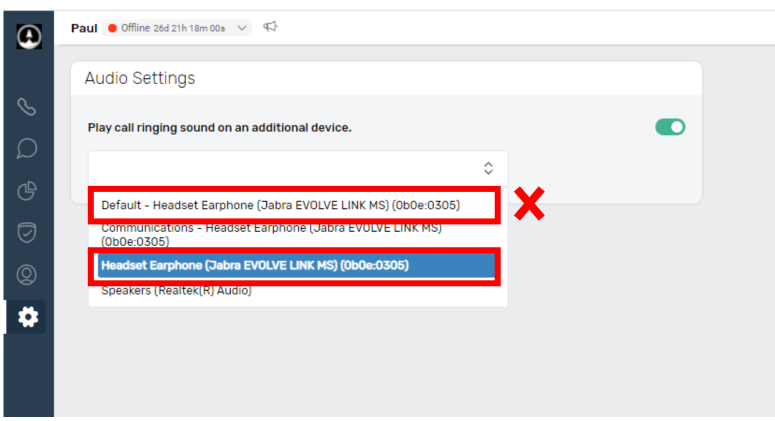
Sub messages can also be setup for particular departments / brands or channels. These can ONLY be enabled if the global message is switched off. The particular message can be entered into the text field and saved to provide an updated message, as needed, if a situation is changing dynamically.

Audio Settings

As a supervisor you may be juggling a lot of different tasks and may not have your SmartAgent browser tab maximized or in view at all times. As well as onscreen notification of any calls being routed to you, you can also switch on a setting to play a ringing tone on a connected device.



If the toggle switch is red it is not turned on – if you toggle it to green you can then access the dropdown field and select a connected audio device.



The dropdown box will present a list of audio devices connected to your device – these may include laptop speakers or a headset / mobile phone earpiece etc.

Some devices may create duplicate responses, sometimes marked as "Default" these may not be correctly linked to a speaker and so you should test the selected device rings correctly. If you need to amend the connected device, you can select another from the list if the audio settings function is enabled.

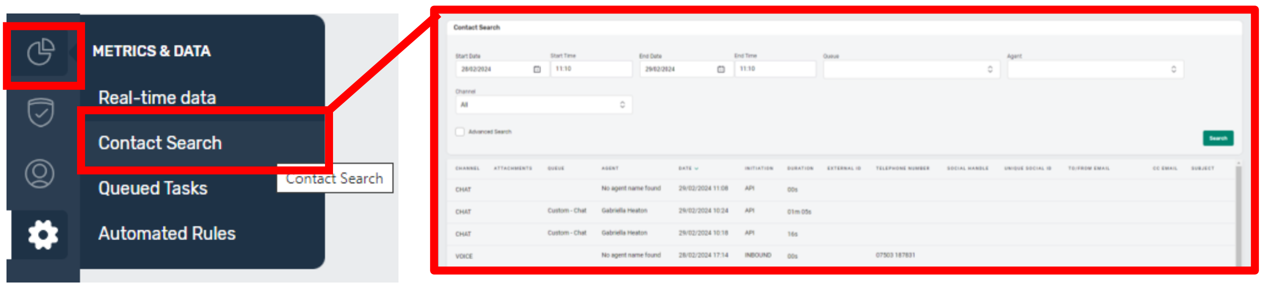
Module 3: Historic data

By the end of this module, you will be able to:

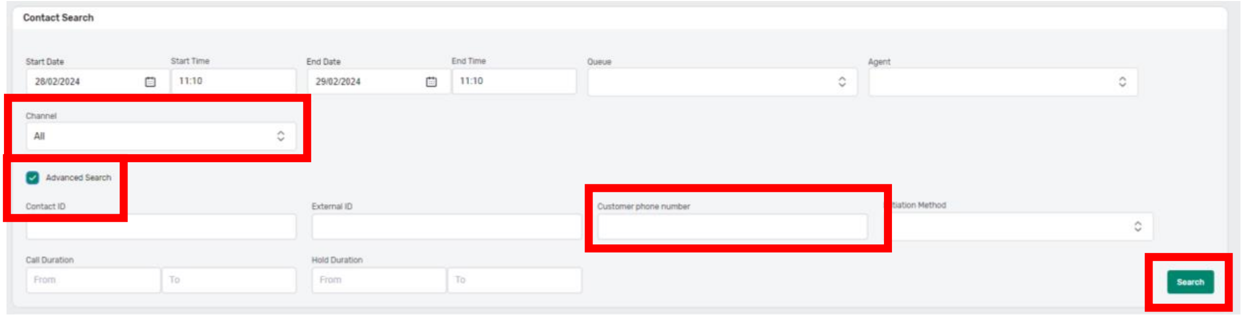
- Access Call recordings and CTR data in SmartAgent
- Access Historic reports in Connect- Queues
- Access Historic reports in Connect- Agents

Access Call Recordings and CTR in SmartAgent

Call recordings and Contact records (CTR's) are available within SmartAgent and can be accessed in Contact Search from the Metrics and Data menu.



The screen will automatically load all contacts within the last 24 hours across all channels, but you can do a refined search using the various data fields in standard search or advanced search options.



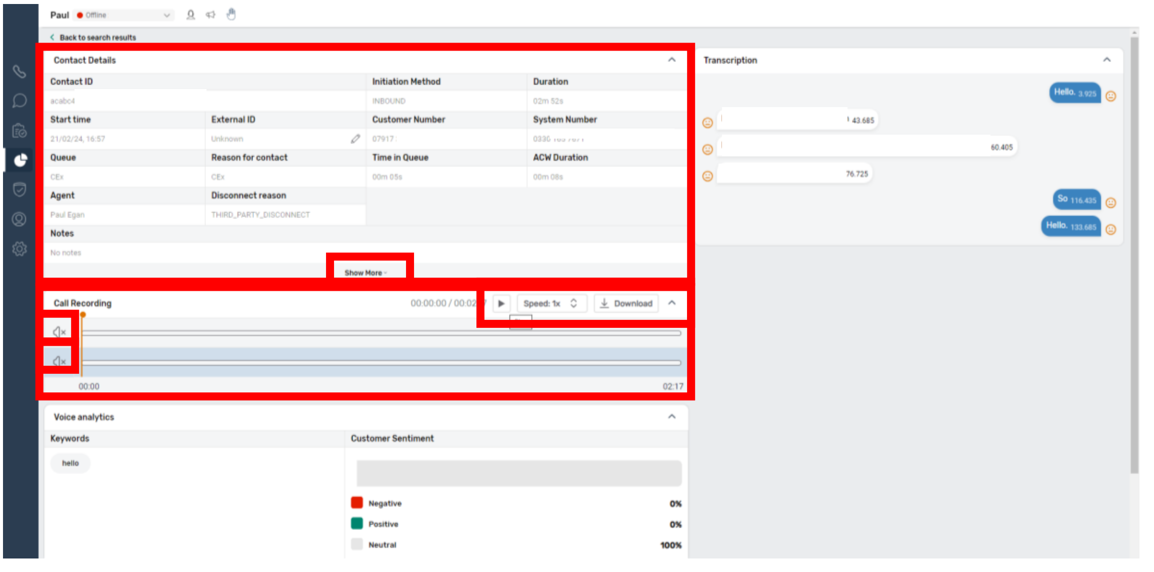
If you select certain channels this will also provide additional search parameters , for example if you select Email channel you can search by Email address as to / from or as CC'd email address.

Once you have the record you want to check click it in the list to bring up the details of the contact.

Access Call Recordings and CTR in SmartAgent (continued)

There will be a CTR record kept of every contact type, Voice call, chat interaction or email, so the information displayed will depend on the contact type and what features have been enabled for your organization.

The Contact Details field contains all the key metric information of the contact and additional meta-data, such as user defined fields, the options chosen by the customer and any after contact work notes input by the Agent. The full data can be accessed by selecting the “show more” option.



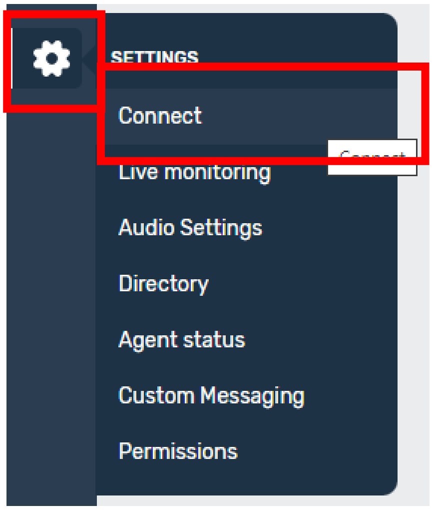
If the contact is a voice recording and call recording is switched on, then a call recording field will appear. In the area you can mute one side of the conversation if needed, can play the recording back at different speeds, scroll to a particular point in the recording or download a copy.

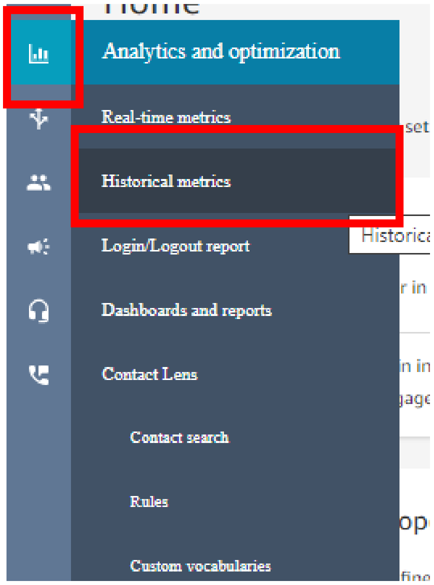
If additional features have been enabled you may have a transcription of the chat / messages or Sentiment analysis done by the “Contact Lens” feature.

If the QA Module has been enabled you will also be given the option to evaluate the call using the QA feature.

Access Historic metrics in Connect – Queues

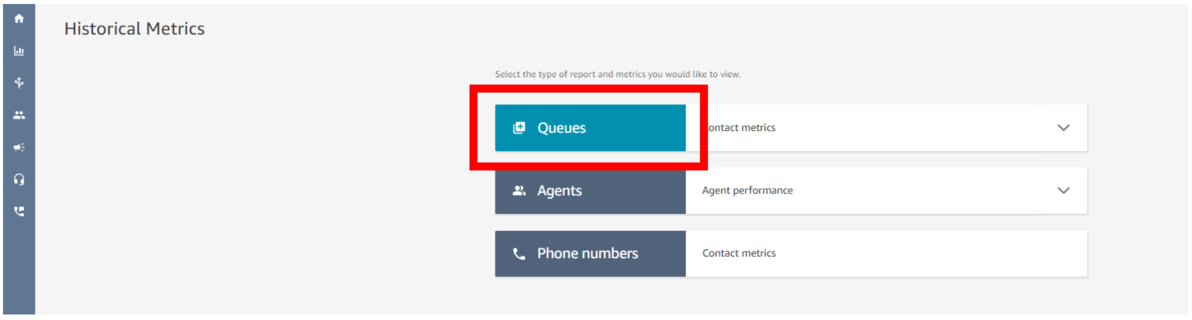
Historic metrics are available within the Amazon Connect application. As a supervisor you may be given access to this part of the application. Access may be restricted to just view reports, or you may also have the ability to create and share reports.





Connect can be accessed from the Settings menu – this will then open an additional tab in Amazon Connect. Historic and Realtime metrics, as well as other reporting features can be accessed from the "Chart" menu option.

You will then be presented with some options for what type of report you want to view or create. Each option will present a "standard" report which you can then reconfigure and save or share as appropriate. Reports can be scheduled to happen at regular intervals and be formed into dashboards in the Connect reporting section.



Access Historic metrics in Connect – Queues (Continued)

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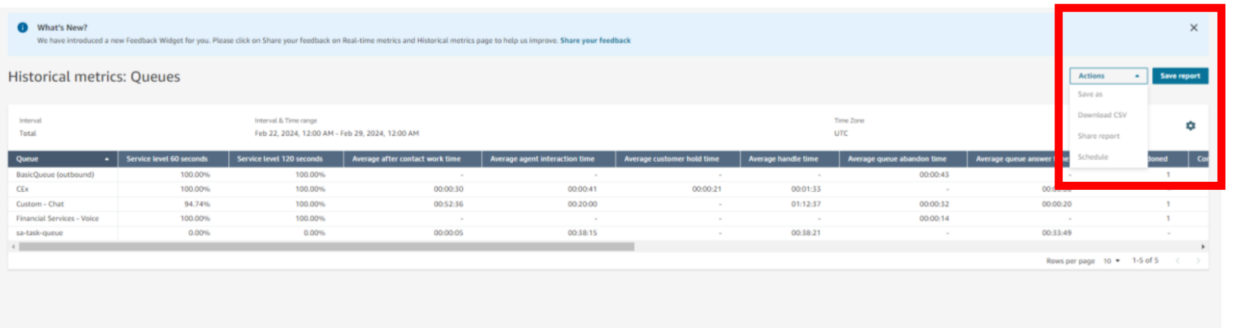
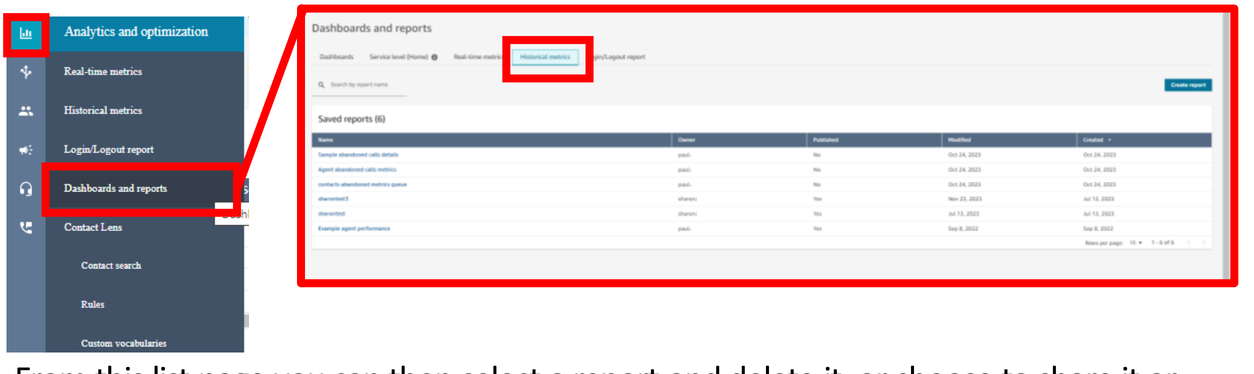
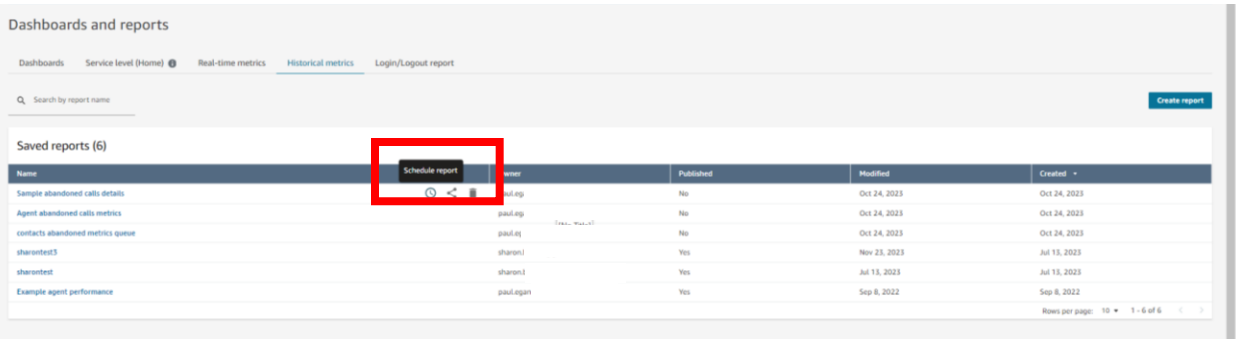


When you have the data as you need it you can save the report and give it a name. Saved Reports can be downloaded as CSV files for further processing or shared and scheduled as necessary if you have permission to do so.

Once a report is saved it is stored in the “Dashboards and Reports” section, under the relevant tab.



From this list page you can then select a report and delete it, or choose to share it or schedule it as required.



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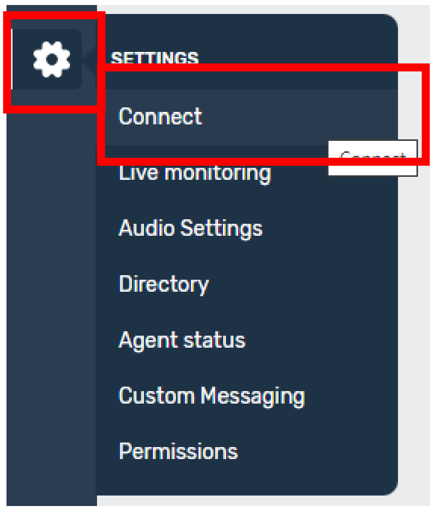

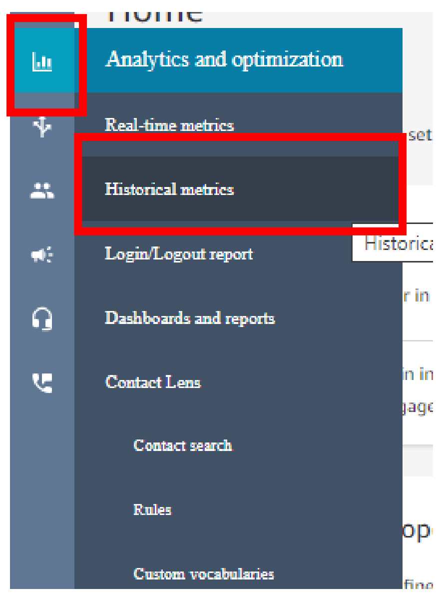

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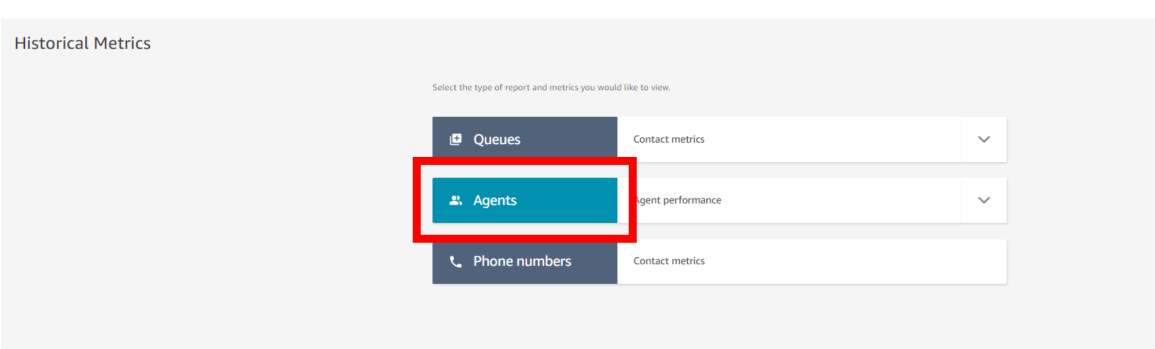

Access Historic metrics in Connect – Agents (Continued)

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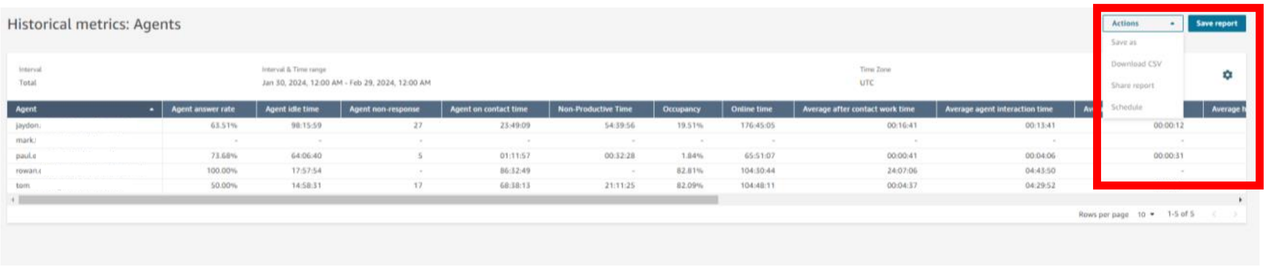

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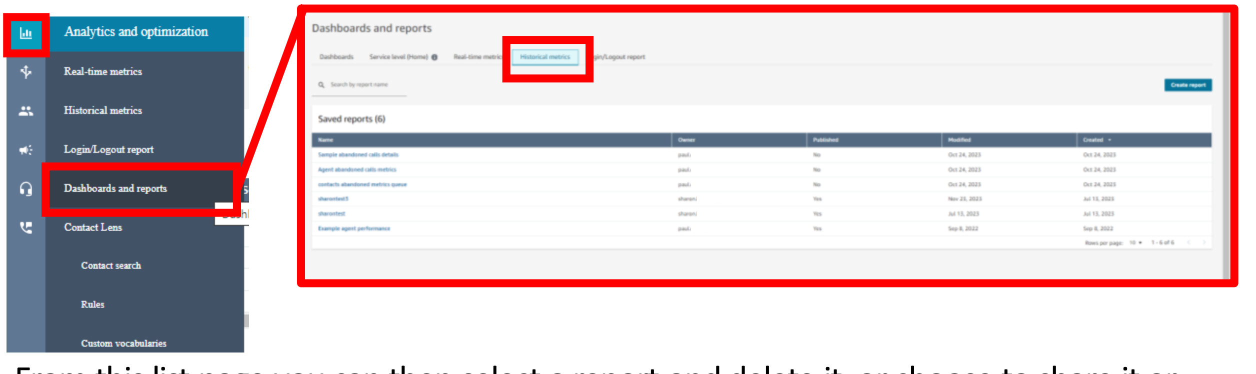
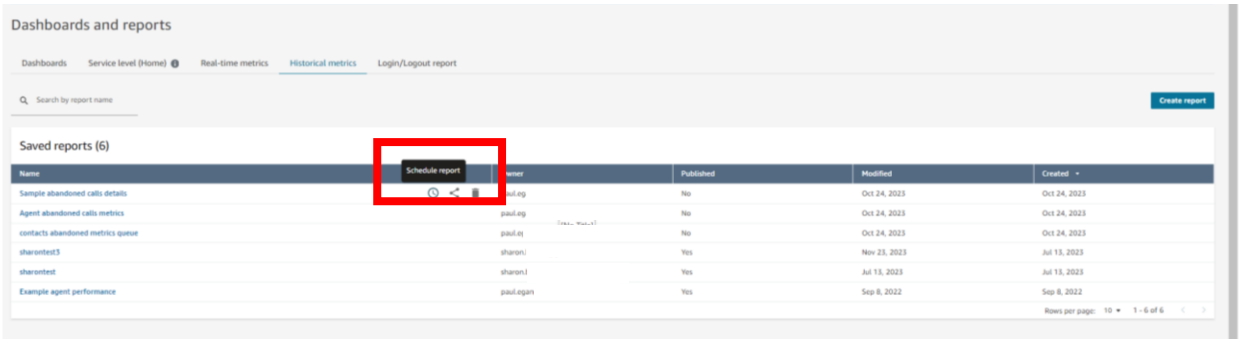


From this list page you can then select a report and delete it, or choose to share it or schedule it as required.



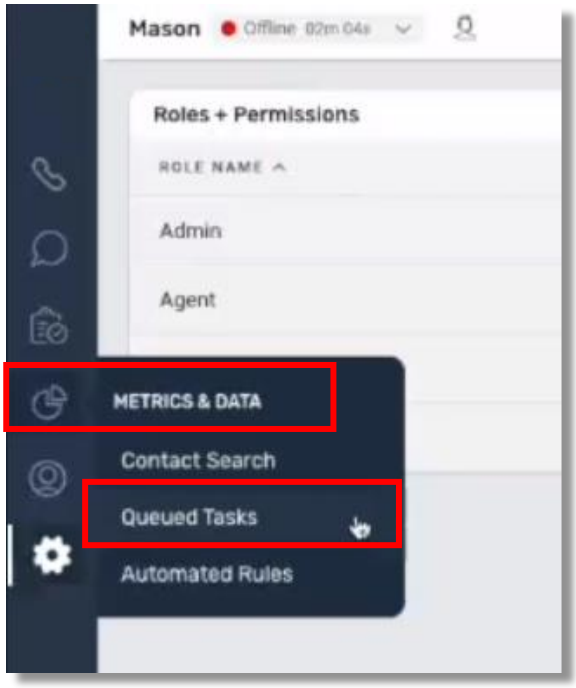
Module 4 Optional extras

By the end of this module, you will be able to:

- Using Queued Tasks
- Use QA Module to evaluate a contact

Manage Queued Tasks

Queued tasks are normally managed by a distinct group of users, often those who may have supervisor access, so Queued Tasks is located under the metrics and data menu option.

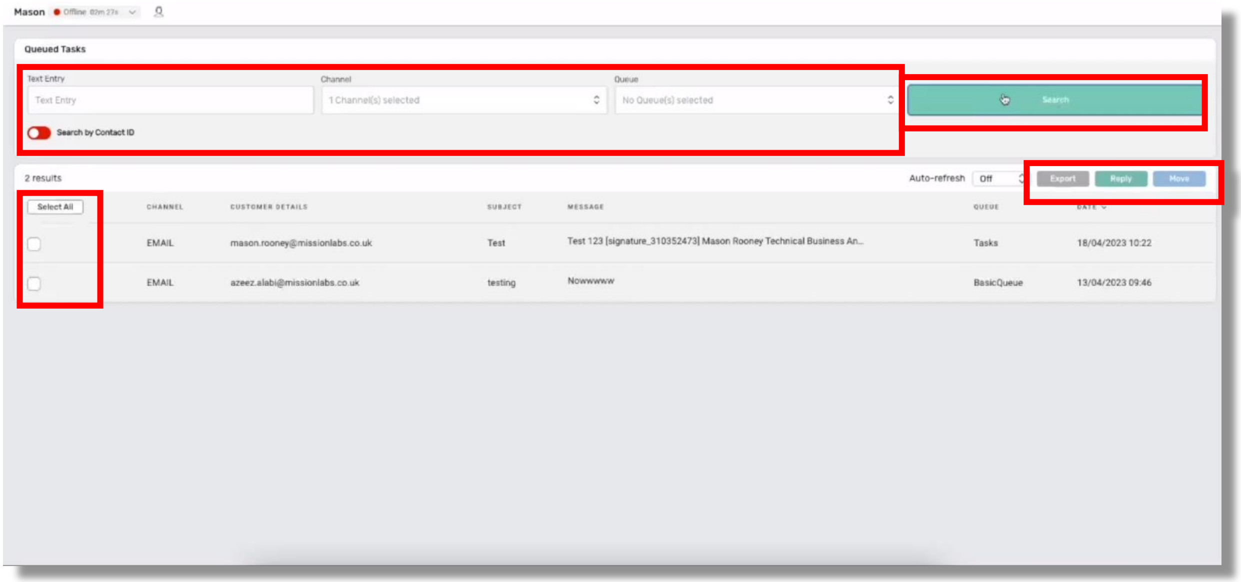


Within the Queued tasks screen you can search for a task containing particular text, from a specific channel or queue or by enabling the toggle switch to search for a specific contact ID. Once you have entered your search parameters hit the search button and the filtered results will appear in the field below.

Manage Queued Tasks (Continued)

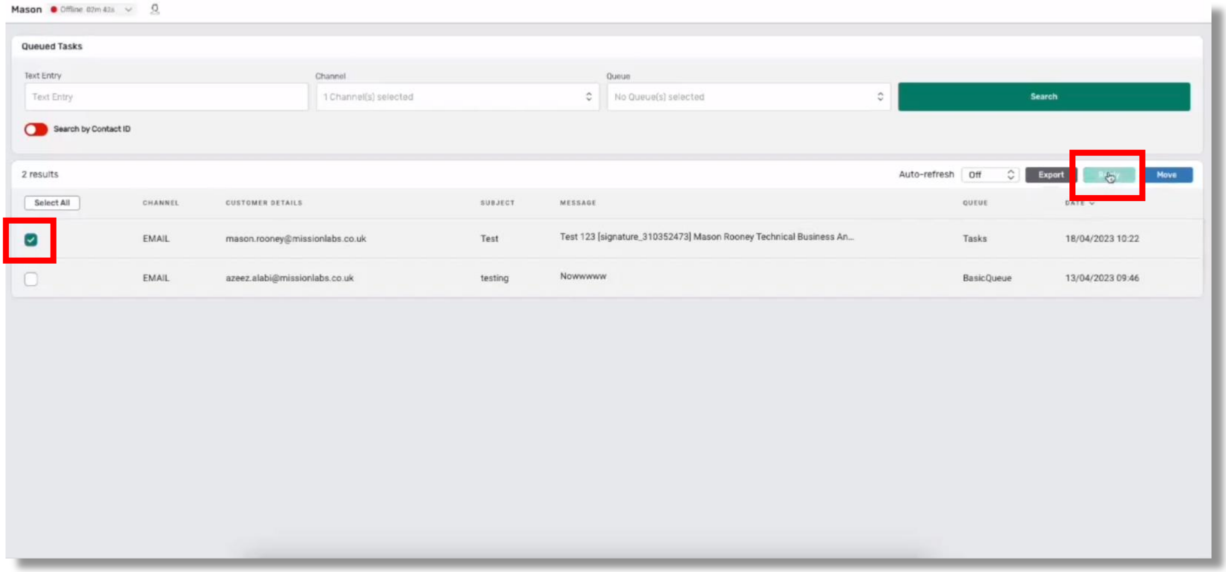
Within this field you can use the "select all" button or specific items by clicking the tickbox next to the item.

Once you have selected items you can then bulk export, move or reply to all the selected items.



Reply / Bulk reply to Queued Tasks

Once you selected the item or items you want to reply to select the reply button.



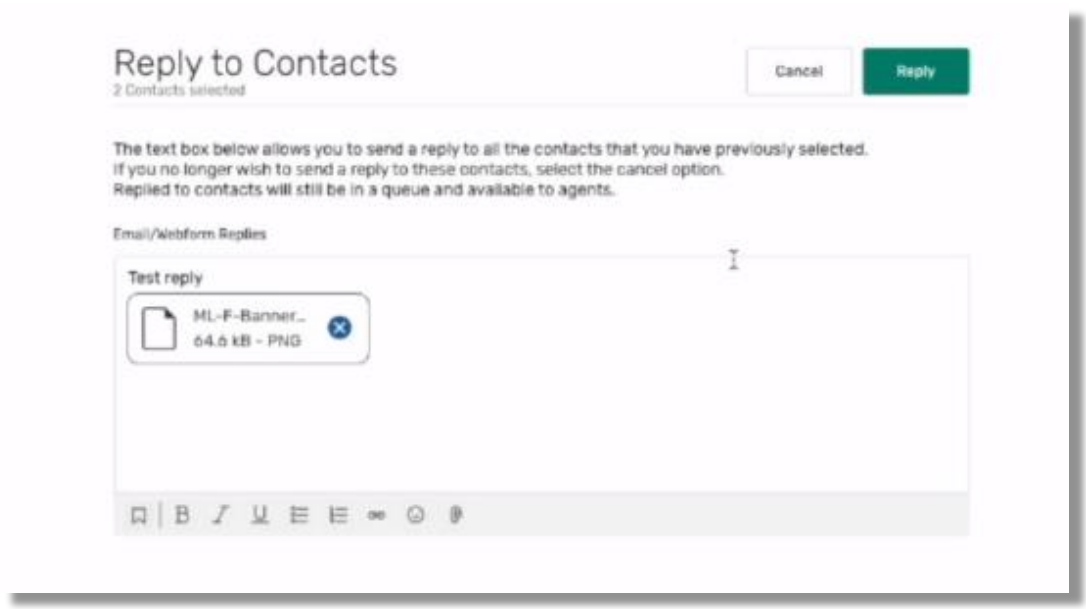
Reply / Bulk reply to Queued Tasks (Continued)

You will then be shown a text box where you can write a response to all the selected tasks. You can access any Quick replies or formatting options. If you have been given permission, you will also see the attachment icon to add attachments.

If you have the permission you can add an attachment to either a single queued task or a number of queued tasks (bulk queued tasks). These permissions are separated, so the attachment icon may appear depending on how many tasks you have selected.

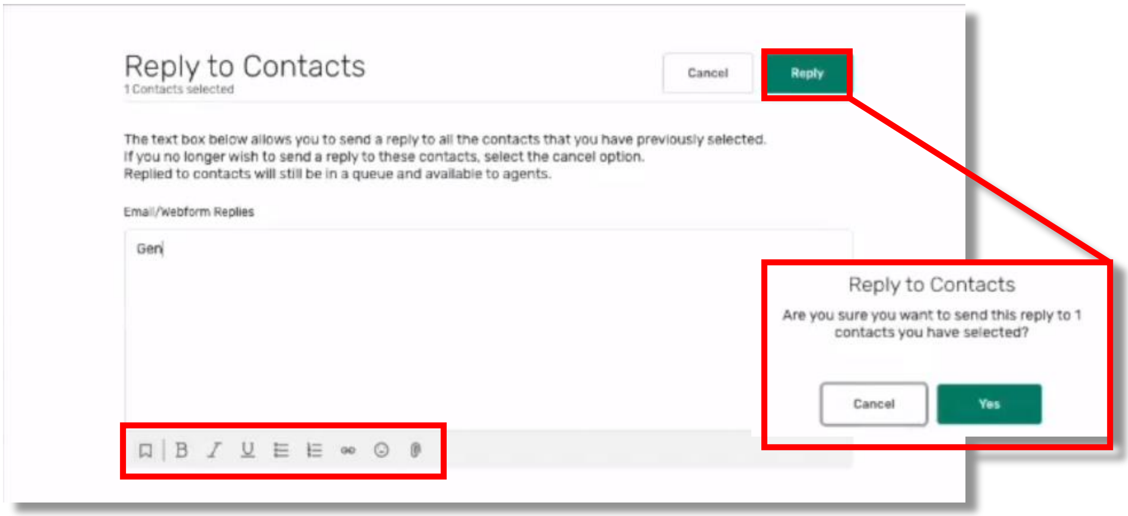
Namely if you select multiple tasks, you need to have the "bulk attachment" permission for the icon to appear. If you only have permission to just "add attachment" then this icon will only occur if you reply to one task at a time.

You can select multiple attachments but need to consider any capacity / file size restrictions within your mailbox settings. The attachment will show onscreen with a file icon, allowing you to check it is the correct attachment and it's size before sending out.



Reply / Bulk reply to Queued Tasks (Continued)

Once you select the reply button you will be asked to confirm if you want to send this reply to the number of selected contacts.



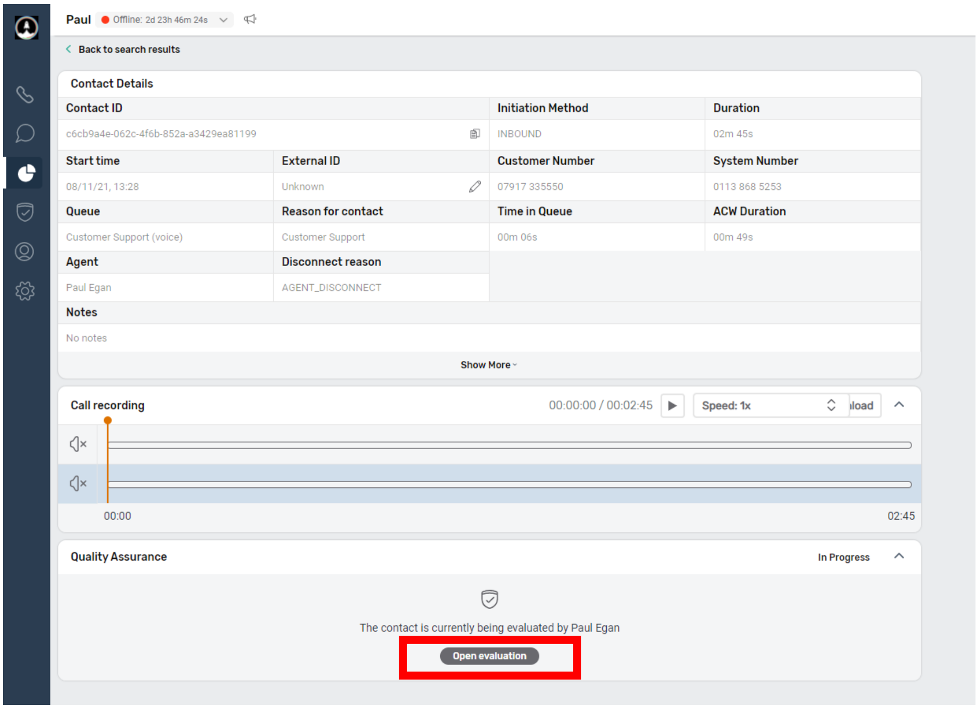
Using Queued Tasks menu to end contacts

Once you have replied to contacts, if you have permission, you will be offered the opportunity to end these contacts. You can enter notes, add a reason for the contact and then choose the yes option to end the contact, or No option for the contacts to remain in the queued task list.

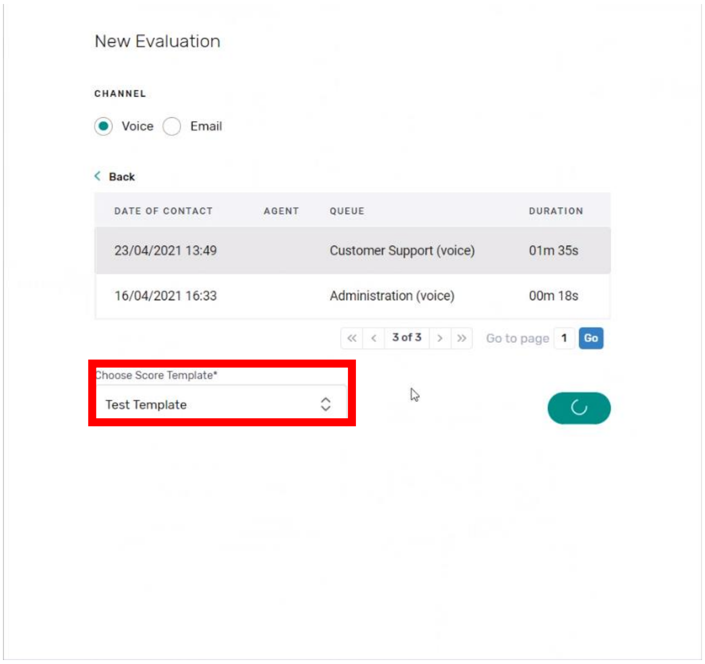
You will get an onscreen progress report as the selected tasks are processed and ended. This may take upto 30 seconds to complete and any errors or issues will be highlighted.

Using the QA Module to evaluate a call (If enabled)

If the QA module has been enabled if a supervisor uses the "Contact search" function to search for a particular call recording or transcript then they will see an additional Quality Assurance field below the contact details.

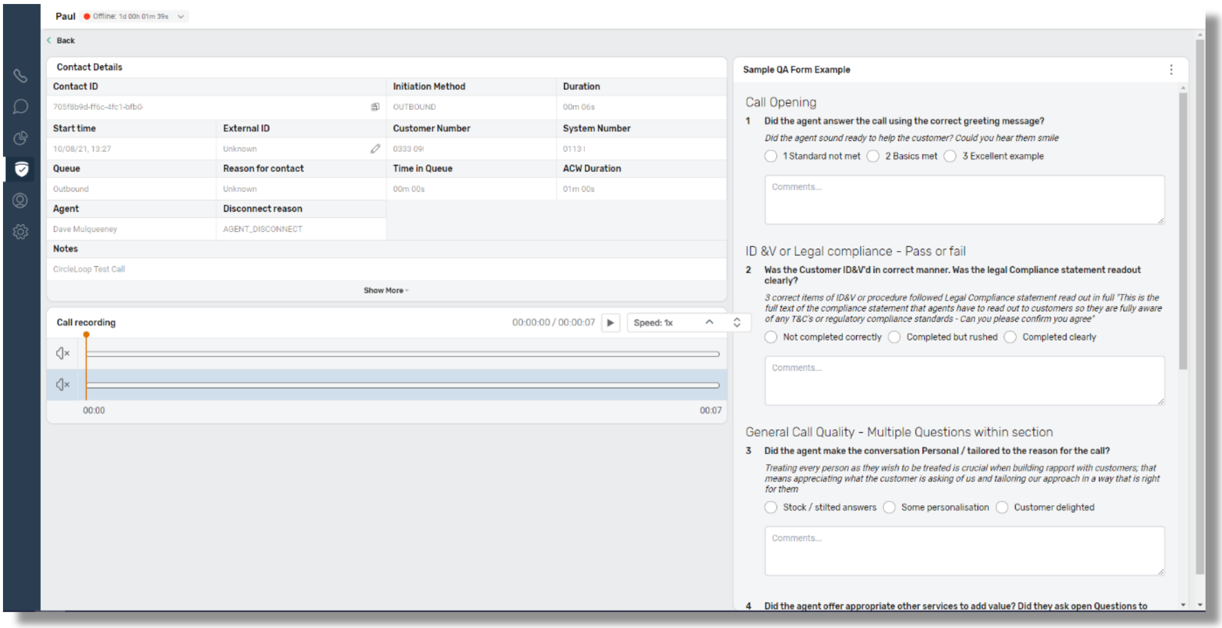


If you select the "Open Evaluation" button you will be able to evaluate the contact, once you have selected the evaluation form to be used. You will need to select the scoring template from the dropdown box.

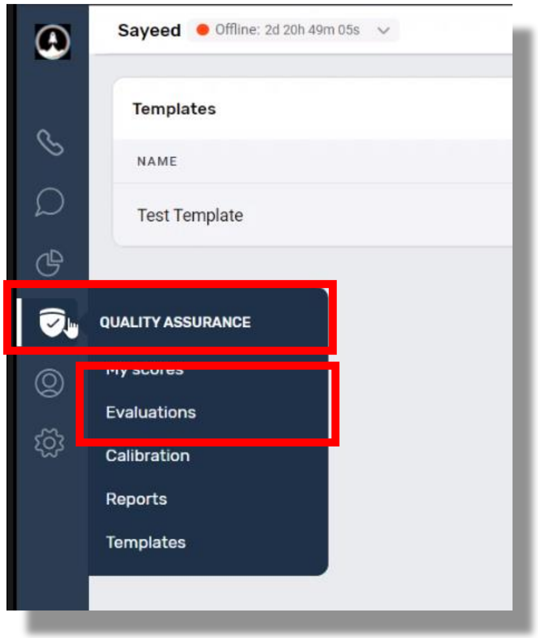


Using the QA Module to evaluate a call (continued)
You can then listen to the call and complete the QA form online.

When you are finished select the green “calculate score” button. Once you have selected the “Calculate Score” button this locks in the score for the call. This new score will be highlighted to the Agent so they can review your form and read any feedback



Previous call evaluations can be searched and viewed from the “evaluations” submenu which can show scores and progress of an evaluation.   You can also start a new evaluation from the evaluations page.



Using the QA Module to evaluate a call (continued)
You can either use the basic search menu, or select the advanced search function to filter your search even further.

If an evaluation gets interrupted or is not completed it will show as “in progress” on this screen and the evaluator can go back in a complete the evaluation at a later date.