

Supervisor Portal

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Introduction

Welcome to your Kauneonga Supervisor Portal! This guide is designed to assist you in efficiently supervising your agents, tracking real-time traffic, and ensuring productivity is maximized. Let's explore its features and functionalities together.

Log into the portal by visiting:

https://{custom_subdomain}.kauneonga.com/supports, and entering your username and password, as an Admin by navigating to “Supervisors” and clicking “Login as”, or as an Agent after tying a Supervisor to your Agent profile.

Supervisors may also utilize the “**Sign in with Google**” OAuth implementation. Using this, supervisors can securely authenticate into the platform using Google's native MFA features to maintain security as well as add an additional seamless way to login.

It is important to note that this method will only be available to Liberty supervisors who use the same email in Liberty as they have in their Google account, meaning this requires a Google account to be possible.

Sign in

Supervisor Sign In

<input type="text" value="Email Address"/>	
<input type="password" value="Password"/>	
<input type="button" value="Sign in"/>	

Forgot your password?

No worries. Click [here](#) to reset your password.



Dashboard

The Supervisor Dashboard contains real-time charts and tables to give you rapid insight to how Operations is performing in Calls, Chats, Recalls, and Agent Productivity. Each section is segmented into three different categories:

Calls

Current Calls

- Current Calls displays all of the active, real-time call data.
 - The bar graph is broken down by Skill.
 - Each Skill will display how many Agents you have available to take calls and how many Agents are on active calls.
 - The graph also contains a line graph showing how many calls are queued in each Skill and the longest waiting call in the group.

Recent Calls

- Recent Calls displays the last 50 calls. These calls can range from Active to Ended.
 - Status
 - i. **In_ivr** - A call that just started and the caller is in the MR.
 - ii. **Wrapped** - A call that has ended and Agent Wrap has ended
 - iii. **Ended** - A call the has ended
 - iv. **On_Hold** - A call that is on hold

Actions

- Actions allow for supervisors to intervene during active calls to provide support, training, or to manage critical situations.
 - Actions
 - i. **Finish** - End a currently active call
 - ii. **Listen** - Listen in on an active call
 - iii. **Coach** - Listen in on an active call and only speak to the Agent
 - iv. **Join** - Join in on an active call as a third participant

- v. **Barge** - Remove the current agent from the call and join as the Agent

Recalls

- The Recalls table will display any currently pending Recalls on the Agent Dashboard that need to be followed-up on.

Kudos

- This table will display any good client feedback from clients on Agent Messages.

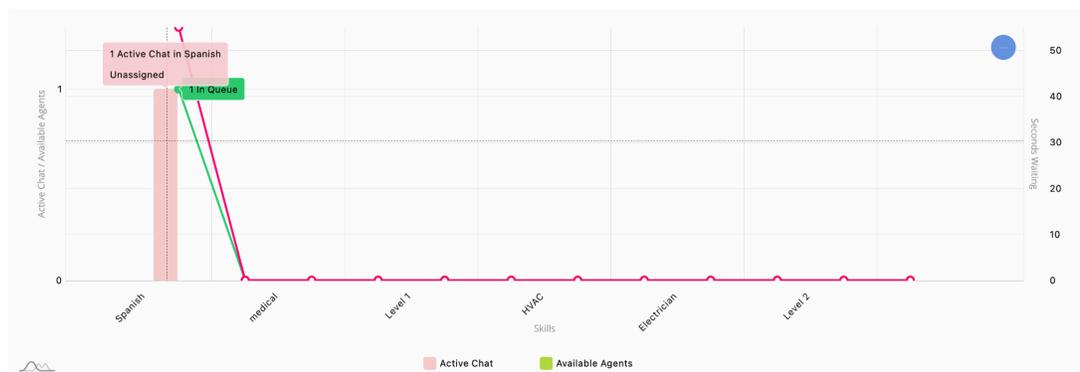
Chat

Current Chats

- Current Chats displays all of the active, real-time chat data.
 - The bar graph is broken down by Skill.
 - Each Skill will display how many Agents you have available to take chats and how many Agents are on active chats.
 - The graph also contains a line graph showing how many chats are queued in each Skill and the longest waiting chat in the group.

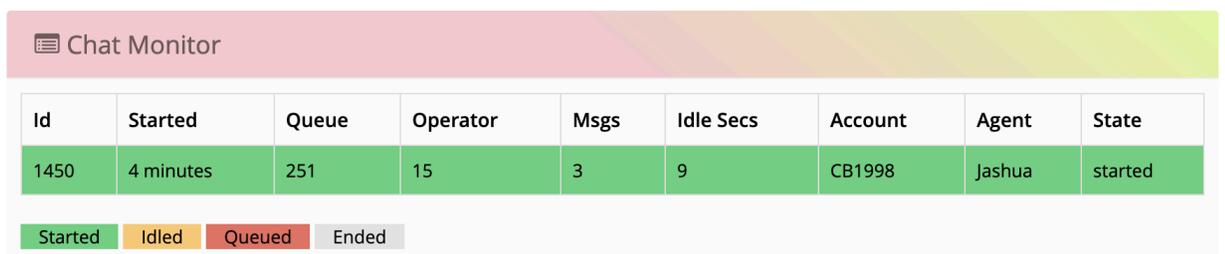
Current Chat

0	0	0	1	1	1	88
Available Agents	Unavailable	In A Chat	Total	Enqueued	Active Sessions	Avg Duration



Chat Monitor

- Chat Monitor displays the last 50 chat sessions and their current state.
 - **ID** - The ID for the Chat
 - **Started** - When the chat Started
 - **Queue** - The amount of the time Chat Visitor spent in Queue
 - **Operator** - The amount of time the Operator spent in the Chat
 - **Msgs** - The number of messages sent in the Chat
 - **Idle Secs** - The amount of time a chat has been inactive
 - **Account** - The account number for the Chat
 - **Agent** - The agent handling the Chat
 - **State** - Current state of the Chat
 - **Queued** - A chat that is waiting for an Agent
 - **Started** - An active chat that is connected to an Agent
 - **Idle** - A chat where there has been no activity.



The screenshot shows a dashboard titled "Chat Monitor" with a table of chat sessions. The table has columns for Id, Started, Queue, Operator, Msgs, Idle Secs, Account, Agent, and State. A single row is visible with the following data: Id: 1450, Started: 4 minutes, Queue: 251, Operator: 15, Msgs: 3, Idle Secs: 9, Account: CB1998, Agent: Jashua, State: started. Below the table is a legend with four colored boxes: Started (green), Idled (yellow), Queued (red), and Ended (grey).

Id	Started	Queue	Operator	Msgs	Idle Secs	Account	Agent	State
1450	4 minutes	251	15	3	9	CB1998	Jashua	started

Legend: Started (green), Idled (yellow), Queued (red), Ended (grey)

Agent Sessions

Agent Sessions

- This dashboard will display the logs of the last 100 agent sessions in the Liberty Agent Portal.
 - From this Dashboard you can see the Logout and going available and unavailable.
 - **#** - Agent ID
 - **Name** - Agent name
 - **Status** - Status of agent log
 - **Started at** - Agent session start time
 - **Ended at** - Agent session end time

- **Time** - Length of agent session
- **Logout reason** - reason for agents signing out

Agent Sessions

0	1	0	0	1
Available	Unavailable	On A Call	In A Chat	Total

Agents sessions

10 records Search:

#	Name	Status	Started at	Ended at	Time	Logout reason
3	Jashua Jean-Louis	Signed in	2024-05-24 18:01:08		12	
3	Jashua Jean-Louis	Active Time	2024-05-24 17:49:35	2024-05-24 17:54:51	316	
3	Jashua Jean-Louis	Signed out	2024-05-24 17:49:32	2024-05-24 18:00:53	681	Auto Sign Out
46	Logan Shooster	Signed out	2024-05-24 15:49:22	2024-05-24 15:55:23	361	Auto Sign Out
46	Logan Shooster	Signed out	2024-05-24 15:45:38	2024-05-24 15:48:41	183	Auto Sign Out
3	Jashua Jean-Louis	Signed out	2024-05-24 14:58:42	2024-05-24 15:04:43	361	Auto Sign Out
3	Jashua Jean-Louis	Signed out	2024-05-24 14:54:14	2024-05-24 14:58:42	268	

Agents presence

10 records Search:

#	Name	Status	Time
3	Jashua Jean-Louis	Unavailable	20

Showing 1 to 1 of 1 entries Previous **1** Next

Agents Presence

- This dashboard will display the current state of all agents currently logged into the Liberty Agent Portal.
 - From this Dashboard you can see the agents available, unavailable, or on a call.

Status	Time
On a call	15

Previous **1** Next

Search:

Status	Time
--------	------

Analytics

1. Dashboards displaying various analytics
 - a. User Feedback Overview - Displays client feedback analytics
 - b. Agent Feedback Overview - Displays agent feedback analytics
 - c. Agent Learning Experience Overview - Displays learning experience analytics
 - d. Account Learning Experience Overview - Displays account learning experience analytics
2. You can save your frequently used Dashboard by selecting 'Save current report as Default'



Learning Experiences

Learning Experiences are Quality Assurance errors that can be reported for Agents on the messages they take. All Learning Experiences get displayed in the Supervisor portal for review separated into three categories:

Main List

Contains all learning experiences

Pending

- Learning Experiences that have not been completed.

Completed

- Learning Experiences that have been completed.

Assigned to Me

Contains all learning experiences that are assigned to you

Voided

Learning Experiences that have been voided

Dashboard > Learning Experiences

Learning Experiences

Main List Assigned to Me Voided [Log Incident](#)

Pending Completed

10 records Search:

ID	Assigned To	Title	Category	Agent	Account #	Company	Created	Platform
1	Tyrone McLaughlin	W0411 Luis Bedoya's Office Relay 257	Relay	Jashua Jean-Louis	W0411	Luis Bedoya's Office	05/10/2023 1:59 pm	Secure
2	Jashua Jean-Louis	W0411 Luis Bedoya Options Off Rings 0 Accuracy 418	Accuracy	Jashua Jean-Louis	W0411	Luis Bedoya Options Off Rings 0	10/26/2023 6:35 pm	Secure
3	Jashua Jean-Louis	W1 Maple Street Medical Relay 420	Relay	Jashua Jean-Louis	W1	Maple Street Medical	10/27/2023 6:06 pm	Secure

Showing 1 to 3 of 3 entries [Previous](#) [1](#) [Next](#)

1. Learning Experiences can be created in two-ways:
 - a. Select Log Incident in the Learning Experience menu on the Supervisor Portal.

Dashboard > Learning Experiences

Learning Experiences

Main List Assigned to Me Voided [Log Incident](#)

Pending Completed

10 records Search:

ID	Assigned To	Title	Category	Agent	Account #	Company	Created	Platform
1	Tyrone McLaughlin	W0411 Luis Bedoya's Office Relay 257	Relay	Jashua Jean-Louis	W0411	Luis Bedoya's Office	05/10/2023 1:59 pm	Secure
2	Jashua Jean-Louis	W0411 Luis Bedoya Options Off Rings 0 Accuracy 418	Accuracy	Jashua Jean-Louis	W0411	Luis Bedoya Options Off Rings 0	10/26/2023 6:35 pm	Secure
3	Jashua Jean-Louis	W1 Maple Street Medical Relay 420	Relay	Jashua Jean-Louis	W1	Maple Street Medical	10/27/2023 6:06 pm	Secure

Showing 1 to 3 of 3 entries [Previous](#) [1](#) [Next](#)

Learning Experience form

Assigned To * -- select manager --

Priority (1) High

Case origin Client

Agent * -- select agent --

Platform * Liberty

Account Number * Enter Account Number

Company * Enter Company

Message Number * Enter Message Number

Category Relay

Description * Enter Description

Due at

Create Learning Experience Void Cancel

b. Selecting the Report to Manager button while logged in as a Supervisor Agent

Dashboard Accounts 0 Replies 0 Secs 0 Chats 0 Secs 0 Calls 0 Secs Help Jashua Jean-Louis

Unavailable to accept calls

W0411 x #729 x IDLE I'm Ready

05/24/24 04:15:50 PM EDT (new) Resend Report to Manager

Account # Luis Bedoya's Office (W0411)
 Agent Jashua Jean Louis
 From Jashua Jean-Louis
 For The Office
 Phone Number (954) 832-6297

Test

Additional Message Details
 Message This is a test
 Patch Results Transfer Attempt 1: Test
 Caller ID (954) 832-6297

Deliver message to...
 Deliver Message

Activities

Activity	Date
Agent Jashua J. made a patch attempt. (message #729) Transfer Attempt 1: Test	May 24 04:15pm
Agent Jashua J. created a new message for the phone Luis Bedoya's Office (message #729)	May 24 04:15pm
Agent Jashua J. sent an sms to Dr. Jashua Jean-Louis 9548326297 (message #729)	May 24 04:15pm
Message was escalated to Urgent Escalation . (message #729)	May 24 04:20pm
The escalation was terminated. (message #729)	May 24 04:20pm

Showing 1 to 5 of 5 entries Previous 1 Next

Dashboard Accounts 0 Replies 0 Secs 0 Chats 0 Secs 0 Calls 0 Secs Help Jashua Jean-Louis

W0411 x #729 x IDLE I'm Ready

05/24/24 04:15:50 PM EDT (new) Resend Report to Manager

Account # Luis Bedoya's Office (W0411)
 Agent Jashua Jean Louis
 From Jashua Jean-Louis
 For The Office
 Phone Number (954) 832-6297

Test

Additional Message Details
 Message This is a test
 Patch Results Transfer Attempt 1: Test
 Caller ID (954) 832-6297

Deliver message to...
 Deliver Message

Report to Manager

Report To * -- select manager --

Priority (1) High

Category Relay

Description * Enter Description

Due at

Report to Manager Cancel

Activities

Activity	Date
Agent Jashua J. made a patch attempt. (message #729) Transfer Attempt 1: Test	May 24 04:15pm
Agent Jashua J. created a new message for the phone Luis Bedoya's Office (message #729)	May 24 04:15pm
Agent Jashua J. sent an sms to Dr. Jashua Jean-Louis 9548326297 (message #729)	May 24 04:15pm
Message was escalated to Urgent Escalation . (message #729)	May 24 04:20pm
The escalation was terminated. (message #729)	May 24 04:20pm

Showing 1 to 5 of 5 entries Previous 1 Next

Reports

Reports Generate reports for different metrics here

Dashboard > Reports

Generated Reports

Usage Details

Usage Summaries

Service Level Report

Performance Report

Leaderboards

Reports

Report Name	Date Range
Agent Sessions	05/03/2024 4:59:39 PM - 06/01/2024 4:59:39 PM
Agent Ratings	05/03/2024 4:59:39 PM - 06/01/2024 4:59:39 PM
Agent Account Feedback	05/03/2024 4:59:39 PM - 06/01/2024 4:59:39 PM
Agent Account Experiences	05/03/2024 4:59:39 PM - 06/01/2024 4:59:39 PM

Generated Reports

- **Agent Sessions** - A report of all agent sign-ins, sign-outs, and availability.
- **Agent Ratings** - A report of all the client feedback Agents have received from Users on their messages.
- **Agent Account Feedback** - A report of all feedback received from Agents on accounts.
- **Agent Account Experiences** - A report of all learning experiences created for all Agents.

Usage Details

- Call Usage Details Records
 - Your CDR report for all call traffic. All of the data in this report is in the raw unrounded format
 - **Unique Call** - The Call ID.

- **Start Time** - Time when the call started.
- **Call Type** - Inbound or Outbound.
- **Start Client** - The account the call started on.
- **End Client** - The account the call ended on.
- **Caller ID** - The Caller ID of the caller.
- **Number Dialed** - The number the caller dialed.
- **DID** - The DID number for the Start Client.
- **Agent Name** - The name of the agent involved on the Call if any.
- **Skill Name** - The name of the skill the call was routed to.
- **Connection Sec** - The total number of seconds the call was connected to Liberty.
- **MR Sec** - The total number of seconds the caller spent in the MR.
- **Wait Sec** - The total number of seconds the caller spent waiting to be routed to an Agent.
- **Talk Sec** - The total number of seconds the caller spent talking to an Agent.
- **Hold Sec** - The total number of seconds the caller spent on hold.
- **Transfer Sec** - The total number of seconds the call spent in the transfer/patched state.
- **Wrap Sec** - The total number of seconds the agent took to create a message or close the account tab post-call.
- **Agent Answer Time** - The timestamp for when the agent answered the call.
- **End Time** - The final timestamp for the end of the call.
- **Hang Up Time** - The timestamp for when the call was hung up
- **Who Hung Up** - Caller or Agent.

Call Usage Detail Records																
06/09/2024 12:52:50 PM - 07/08/2024 12:52:50 PM		10	records	Search Builder	US/Eastern	Export										
Unique Call	Start Time	Call Type	Start Client	End Client	Callerid	Number Dialed	DID	Agent Name	Skill Name	Connection Sec	IVR Sec	Wait Sec	Talk Sec	Hold Sec	Transfer Sec	Wi Se
3000002458	2024-07-06 23:38:59.0 US/Eastern	Inbound	VM002	VM002	917-539-5694	7543101719	754-310-1719		Legal	3	3	0	0	0	0	0
3000002457	2024-07-04 13:21:01.9 US/Eastern	Inbound	VM002	VM002	954-803-2302	7543101719	754-310-1719		Legal	10	9	1	0	0	0	0
3000002456	2024-07-03 16:03:33.9 US/Eastern	Inbound	W0411	W0411	954-396-5322	7542838007	754-283-8007		Legal	2	2	0	0	0	0	0
3000002454	2024-07-03 14:19:01.7 US/Eastern	Outbound	W0411	W0411	754-283-8007	9549696241	754-283-8007	jashuaj	Legal	60	0	0	15	46	0	0
3000002452	2024-07-03 14:17:59.5 US/Eastern	Outbound	W0411	W0411	754-283-8007	9548326297	754-283-8007	jashuaj	Legal	11	0	0	11	0	0	73
3000002450	2024-07-03 14:16:50.0 US/Eastern	Inbound	W0411	W0411	954-396-5322	7542838007	754-283-8007	jashuaj	Legal	60	6	6	51	13	9	0
3000002449	2024-07-03 14:14:26.7 US/Eastern	Outbound	W0411	W0411	754-283-8007	9548326297	754-283-8007	jashuaj	Legal	0	0	0	40	14	0	0
3000002448	2024-07-03 14:14:09.8 US/Eastern	Inbound	W0411	W0411	954-396-5322	7542838007	754-283-8007	jashuaj	Legal	128	4	7	67	0	0	0
3000002447	2024-07-03 13:55:06.9 US/Eastern	Outbound	W0411	W0411	754-283-8007	9548326297	754-283-8007	jashuaj	Legal	82	0	0	53	13	0	0
3000002446	2024-07-03 13:54:49.1 US/Eastern	Inbound	W0411	W0411	954-396-5322	7542838007	754-283-8007	jashuaj	Legal	126	6	9	32	0	0	0

Showing 1 to 10 of 77 entries

Previous 1 2 3 4 5 ... 8 Next

- Chat Usage Detail Records

- Your CDR report for all chat traffic. All of the data in this report is in the raw un-rounded format.

- **ID** - The unique ID for the Chat
- **Start Time** - When the chat started
- **Client** - The Account number the chat came in on
- **Skill Name** - The name of the skill queue the chat was routed to
- **Agent Name** - The name of the agent the chat was routed to
- **Contact Name** - The name of the contact gathered on the Chat
- **Queue Sec** - The total number of seconds spent waiting for an available agent to start the chat
- **Operator Sec** - The total number of seconds spend chatting with an Agent
- **End Time** - The final timestamp for the the end of the chat
- **Who Ended** - The description of who ended the chat session
- **Disposition** - The final action taken on the chat session
- **Page Visits Count** - The number of pages visited during the chat session by the visitor
- **Bot Sec** - The total number of seconds spent interacting with all non-agent prompts.

Chat Usage Detail Records

06/09/2024 12:52:50 PM - 07/08/2024 12:52:50 PM 10 records Search Builder US/Eastern Export

Id	Start Time	Client	Skill Name	Agent Name	Contact Name	Queue Sec	Operator Sec	End Time	Who Ended	Disposition	Page Visits Count	Bot Sec
1433	2024-06-12 10:47:07.6	W1	medical	Jose A.	Visitor	4	11	2024-06-12 10:47:19.2		closed_tab	1	
1422		W1	medical		Visitor	3	0	2024-06-12 10:32:04.3	Visitor	visitor_closed	1	
1425	2024-06-12 10:37:44.7	W1	medical	Jose A.	Visitor	7	16	2024-06-12 10:38:01.0		create_message	1	
1424		W1	medical		Visitor	0	0	2024-06-12 10:35:41.4	Visitor	visitor_closed	1	
1432		W1	medical		Visitor	0	0	2024-06-12 10:46:57.4	Visitor	visitor_closed	1	
1478	2024-06-12 16:32:26.9	P0000	Plumbing	Rafael	Rafael	66	7	2024-06-12 16:32:34.1	Rafael	create_message	1	
1463	2024-06-12 16:22:38.4	P0000	Plumbing	Rafael	rafael	41	31	2024-06-12 16:23:09.0	Rafael	create_message	1	
1461	2024-06-12 16:18:08.5	P0000	Plumbing	Rafael	Gio	38	35	2024-06-12 16:18:43.7	Gio	visitor_closed	1	
1464	2024-06-12 16:25:53.3	P0000	Plumbing	Jashua	Gio	41	12	2024-06-12 16:26:05.7	Gio	visitor_closed	1	
1423		W1	medical		Visitor	0	0	2024-06-12 10:35:32.4	Visitor	visitor_closed	1	

Showing 1 to 10 of 107 entries

Previous 1 2 3 4 5 ... 11 Next

Usage Summaries

- Call Usage Summary Report
 - A summary of your rounded call traffic that can be broken down into different categories. This report also allows you to view your data in various rounding metrics.

Call Usage Summary Report

06/11/2024 5:30:19 PM - 07/10/2024 5:30:19 PM By Client By Month Round: Default (60.0) Export

Client	Month	Call Count	Minutes	Connection Sec	Connection Units	Connection Min	Connection Plus Wrap Sec	Connection Plus Wrap Units	Connection Plus Wrap Min	IVR Sec	IVR Units	IVR Min	Wait Sec	Wait Units	Wait Min	Talk Sec	Talk Units
VM002	Jul 2024	6	9.0	243	9	9.0	243	9	9.0	241	9	9.0	2	2	2.0	0	0
W0411	Jun 2024	34	53.0	1788	47	47.0	2143	53	53.0	337	21	21.0	360	16	16.0	1036	31
W0411	Jul 2024	42	79.0	3505	77	77.0	3601	79	79.0	551	29	29.0	173	18	18.0	1966	50
W1	Jun 2024	1	1.0	28	1	1.0	28	1	1.0	6	1	1.0	6	1	1.0	16	1

Showing 1 to 4 of 4 entries

- Chat Usage Summary Report

- A summary of your rounded chat traffic that can be broken down into different categories. This report also allows you to view your data in various rounding metrics.

Chat Usage Summary Report																
06/11/2024 5:30:19 PM - 07/10/2024 5:30:19 PM		By Client	By Month	Round: Default (60.0)	Export											
Client	Month	Chat Count	Bot Count	Live Count	Queue Sec	Queue Units	Queue Min	Bot Sec	Bot Units	Bot Min	Operator Sec	Operator Units	Operator Min	Duration Sec	Duration Units	Duration Min
2478	Jun 2024	2	0	0	0	0	0.0	1159	20	20.0	0	0	0.0	0	0	0.0
2478	Jul 2024	1	0	0	0	0	0.0	468	8	8.0	0	0	0.0	0	0	0.0
B7777	Jun 2024	1	0	0	0	0	0.0	552	10	10.0	0	0	0.0	0	0	0.0
CB1998	Jun 2024	3	0	0	0	0	0.0	2412	42	42.0	0	0	0.0	0	0	0.0
CB1998	Jul 2024	1	0	0	0	0	0.0	678	12	12.0	0	0	0.0	0	0	0.0
P0000	Jun 2024	30	0	10	342	11	11.0	9695	177	177.0	312	12	12.0	654	18	18.0
P0814202301	Jun 2024	1	0	0	0	0	0.0	111	2	2.0	0	0	0.0	0	0	0.0
p8696	Jul 2024	19	0	7	263	8	8.0	6897	124	124.0	254	9	9.0	517	14	14.0
S7130	Jun 2024	6	0	0	467	8	8.0	2224	40	40.0	0	0	0.0	467	8	8.0
S7130	Jul 2024	1	0	0	0	0	0.0	494	9	9.0	0	0	0.0	0	0	0.0
W0411	Jun 2024	6	0	0	0	0	0.0	3501	61	61.0	0	0	0.0	0	0	0.0
W1	Jun 2024	36	0	8	137	9	9.0	11135	205	205.0	216	9	9.0	353	11	11.0
W1	Jul 2024	18	0	4	134	5	5.0	7005	124	124.0	67	4	4.0	201	6	6.0
W198712	Jun 2024	1	0	0	0	0	0.0	773	13	13.0	0	0	0.0	0	0	0.0
W3	Jun 2024	1	0	0	0	0	0.0	330	6	6.0	0	0	0.0	0	0	0.0

Showing 1 to 10 of 15 entries

Service Level Report

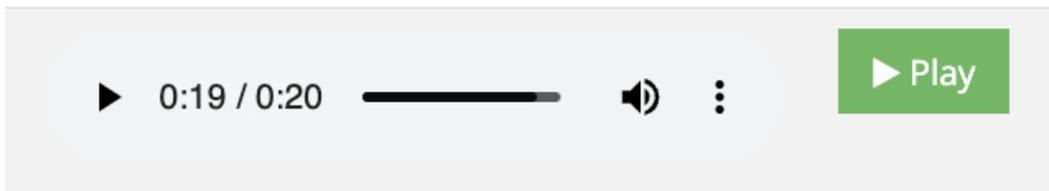
- The Service Level Report is designed to provide a comprehensive analysis of call handling performance within a specified period. This report focuses on various metrics that offer insights into the efficiency and effectiveness of your call handling processes.
 - **Skill Name:** This indicates the specific skill or service category associated with the calls.
 - **Average Wait Time:** The average time callers wait before being attended to, measured in seconds.
 - **Average Talk Time:** The average duration of conversations between agents and callers.
 - **Average Hold Time:** The average time callers are placed on hold during interactions.
 - **Number of Calls:** The total number of distinct calls handled within the reporting period.

- **Abandoned Calls:** The total number of calls where the caller hung up before speaking to an agent.
- **Abandoned Percentage:** The percentage of calls abandoned out of the total calls received.
- **Wait Over 60 Seconds:** The number of calls where the wait time exceeded the specified threshold (default is 60 seconds).

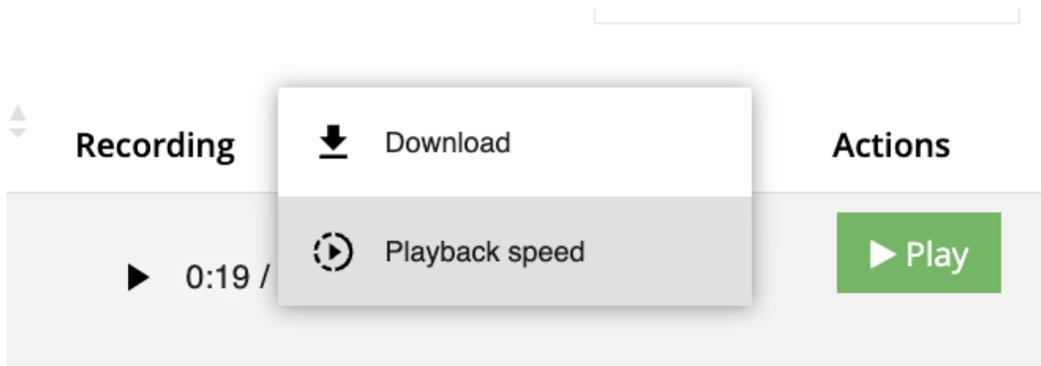
Call Recordings

Call Recording will display all call recordings from accounts with the call recording feature enabled for up to 90 days. These recordings can be listened to or downloaded.

- **ID** - Recording ID
- **Account Number** - Account Number of terminating DID
- **Call UUID** - Unique Call ID of associated recording
- **Agent Username** - Agent active during call
- **Date and Time** - End timestamp of recording
- **DID** - Terminating number dialed on recording
- **From** - Originating caller on recording
- **Recording** - Button to listen to or download recording



- **Actions** - Button to play recording

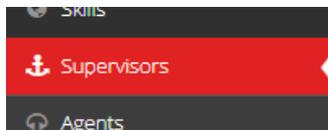


Workforce Management

Accessing the dashboard provides access to the central hub for managing scheduling tasks., workforce managers cannot initiate or oversee scheduling activities.

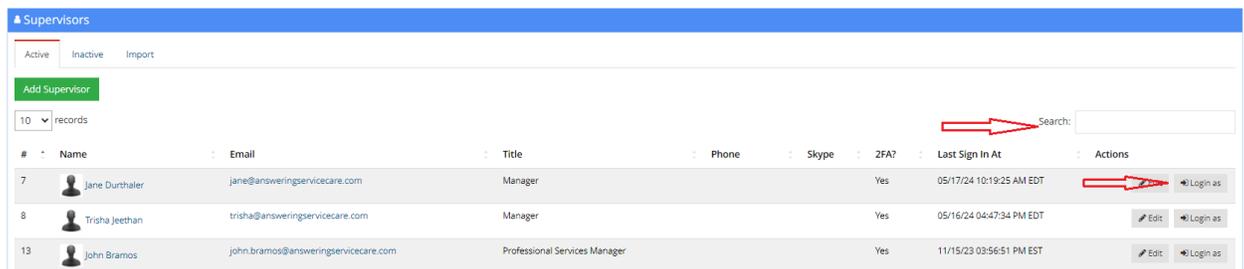
To access the "Workforce Management" dashboard, navigate to the Admin menu on the left and select "Supervisors."

Each step in the guide is intricately connected to the scheduling process, equipping workforce managers with the essential tools and functionalities required to seamlessly create, manage, and optimize employee schedules, ensuring they meet staffing requirements effectively. This platform streamlines scheduling processes, enhances scheduling accuracy, and promotes operational efficiency in workforce management.



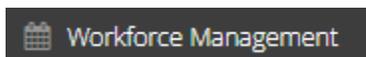
Logging In:

- Locate your name either through the list display or by using the search box, then click the "Login as" button to access the support dashboard.



#	Name	Email	Title	Phone	Skype	2FA?	Last Sign In At	Actions
7	Jane Durthaler	jane@answerservicecare.com	Manager			Yes	05/17/24 10:19:25 AM EDT	Login as
8	Trisha Jeethan	trisha@answerservicecare.com	Manager			Yes	05/16/24 04:47:34 PM EDT	Edit Login as
13	John Bramos	john.bramos@answerservicecare.com	Professional Services Manager			Yes	11/15/23 03:56:51 PM EST	Edit Login as

- This will take you to the support dashboard. Select



Dashboard Widgets:

The dashboard widgets serve as quick access points to essential areas within the workforce management suite, facilitating streamlined navigation and acting as convenient shortcuts.

Dashboard > Workforce Management

- Schedules: 0
- Skill Groups: 1
- Agent Schedules: 1
- Visual Forecast: 0

Schedules

- Users can tailor scheduling parameters such as the number of weeks (from previous schedules), wait times, and hold times to optimize resource utilization, considering rest periods and task management.
- Set the period: Click "Next" to automatically populate the date for the next schedule creation.
- Configure Requirements Settings: Utilize the "Choose Weeks" section to select time periods based on current, previous, or custom requirements, adjusting settings to meet specific evaluation criteria.

Schedules Schedules Index

Dashboard > Workforce Management > Schedules

No schedules available

Schedules

Period: Prev Next

Choose weeks: ON

Add Time Period:

Time Period: 05/24/2024 12:00:00 AM - 05/24/2024 4:54:38 PM x

Use Wait:

Use Hold:

Use Wrap:

Use Saved Minute Per Hour:

Schedules Schedules Index

Dashboard > Workforce Management > Schedules

No schedules available

Schedules

Period: Prev Next

Choose weeks: OFF

Number of Weeks:

Use Wait:

Use Hold:

Use Wrap:

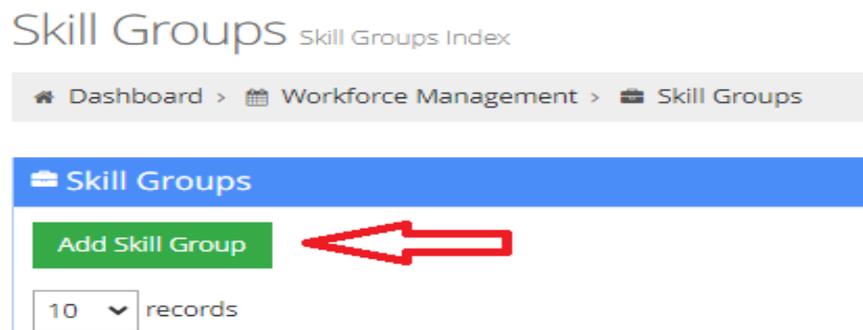
Use Saved Minute Per Hour:

Skill Groups

- Using skill groups helps the user allocate staff efficiently by categorizing employees based on expertise. By creating skill groups, users can ensure that employees with the appropriate skills are assigned to tasks or shifts that match their capabilities, improving scheduling accuracy.
- To create a new skill group, click the arrow at the bottom of the widget or "view more."



- Click "Add Skill Group" at the top left of the screen, enter the name of the new skill group, and select the corresponding skill, then click "Create Skill Group."



Create Skill Group Create a new skill group

Dashboard > Workforce Management > Skill Groups > + Add Skill Group

Skill Group form

Name	<input type="text" value="TECH"/>
Skills	<ul style="list-style-type: none">EntertainmentTravelGovernmentEducationFinanceInsuranceTechSecurity

- Enter the name of the new skill group and select the corresponding skill.

Create Skill Group Create a new skill group

Dashboard > Workforce Management > Skill Groups > + Add Skill Group

Skill Group form

Name	<input type="text" value="TECH"/>
Skills	<input type="text" value="* Tech"/>

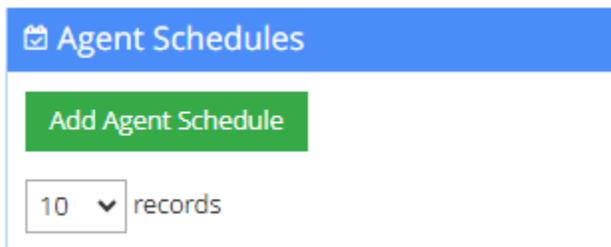
- Assign a skill to the group and click Create Skill Group.

Agent Schedules

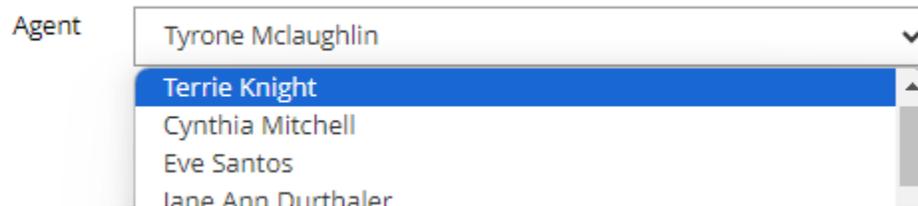
- This area of our platform allows the user to generate personalized schedules for individual employees. By setting fixed schedules for each employee, workforce managers can optimize resource allocation and ensure that staffing levels meet demand effectively. Features such as adding, modifying, copying, and clearing schedules provide flexibility in managing and updating employee schedules as needed.
 - To create a new schedule for an agent, click the arrow at the bottom of the widget or “view more”



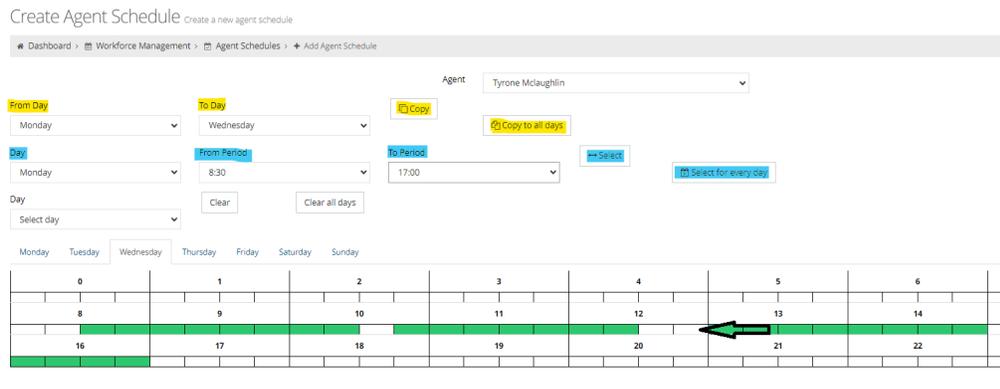
- Click Add Agent Schedule



- **Select Agent:** Choose an agent from a predefined list (picklist) or start typing the agent's name. Once selected, the agent's schedule will be displayed or populated on the page.



- **Create Agent Schedule Page:** This page allows users to view and manage the selected agent's schedule.
- **Add Schedule:** Add schedules for the agent by selecting the day and time period.



- **Modify Schedule:** Adjust the schedule by adding or removing time in 15-minute increments. This option proves useful for incorporating breaks and lunch periods seamlessly into the schedule.
- **Copy Schedule:** Users have the option to copy a schedule from one day to another or to all days for streamlined scheduling.
- **Clear Schedule:** Clear the schedule for a specific day or for all days. This functionality provides flexibility in managing and updating schedules as needed.

Visual Forecast

- Visual forecasts provide workforce managers with granular insights into staffing requirements at different times of the day. By creating visual forecasts based on historical data and current scheduling parameters, managers can anticipate demand fluctuations and proactively adjust schedules to minimize overstaffing or understaffing, thereby optimizing resource allocation.
 - To create a Visual Forecast, click the arrow at the bottom of the widget or “view more”



- Select the desired schedule that you have created



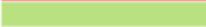
- Once you made the necessary adjustments to the schedule, click “Save Visual Forecast” in order to save your corrections.

Create Visual Forecast Create a new visual forecast

Dashboard > Workforce Management > Visual Forecasts > Add Visual Forecast

Time Zone: (GMT-05:00) Eastern Time (US & Canada)

Legend

Legend for top bar		Legend for Agent	
Over Scheduled		Work hour this day	H
Status Even		Work minute this day	M
Under Scheduled		Work hour this week	WH
Over 40 Hours		Work minute this week	WM
Break			
Range Select			

Go To Agent: Skill:

Preview with Timezone: [Exit Preview](#)

Monday Tuesday Wednesday Thursday Friday Saturday Sunday

[Save Visual Forecast](#)

Hour 0 1 2 3 4 5 6 7 8 9 10

