Portrait
Foundation

Agent Manager - Application Functional Overview

Edition 2.2

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Pitney Bowes
Software

Portrait Foundation
Agent Manager - Application Functional Overview

Acknowledgement of trademarks

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Portrait Software is now part of Pitney Bowes Software Inc.

Portrait Software enables organizations to engage with each of their customers as individuals, resulting in improved customer profitability, increased retention, reduced risk, and outstanding customer experiences. This is achieved through a suite of innovative, insight-driven applications which empower organizations to create enduring one-to-one relationships with their customers.

Portrait Software was acquired in July 2010 by Pitney Bowes to build on the broad range of capabilities at Pitney Bowes Software for helping organizations acquire, serve and grow their customer relationships more effectively. The Portrait Customer Interaction Suite combines world leading customer analytics, powerful inbound and outbound campaign management, and best-in-class business process integration to deliver real-time customer interactions that communicate precisely the right message through the right channel, at the right time.

Our 300 + customers include industry-leading organizations in customer-intensive sectors. They include 3, AAA, Bank of Tokyo Mitsubishi, Dell, Fiserv Bank Solutions, Lloyds Banking Group, Merrill Lynch, Nationwide Building Society, RACQ, RAC WA, Telenor, Tesco Bank, T-Mobile, Tryg and US Bank.

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About this document

Purpose of document

The purpose of the document is to provide a functional description of the administration of agents in a Portrait Foundation system.

Intended audience

The intended audience is those concerned with the planning and initial studies for a project using Portrait Foundation.

Related documents

Contact Centre Functional Overview

Software release

Portrait Foundation 3.1 or later.

Contents

1 Introduction

Portrait Agent Manager is an administration application which is used to maintain the details of the agents and teams using the Portrait Centre.

It has the following capabilities.

1. Set up of new agents and maintenance of their details.
2. Set up of telephony details for agents
3. Assignment of roles to agents
4. Set up of teams, and assignment of agents to teams.

2 Accessing Agent Manager

2.1 Starting Agent Manager

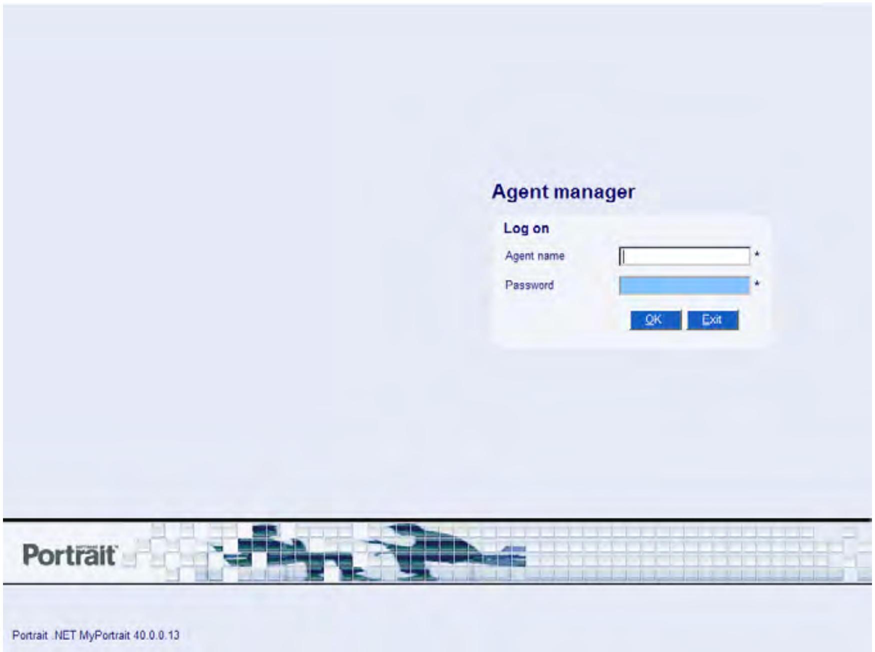
Open the icon **Portrait shortcuts** which has been placed on your desktop by the Portrait Implementation install.

Select **Portrait ASP.NET Agent Manager** from the list of Portrait URLs.

2.2 Log on

The Portrait Agent Manager splash screen is briefly displayed and the agent manager is presented with the **Agent manager log on** dialog.

Figure 1 Log on



The agent manager enters their name (interpreted by the application as their Agent identifier) and password and clicks **OK**. The application checks for authenticity. Only agents with the role of Administrator can log on to this application.

If the agent's name and password are valid, the agent manager is logged on to the application and presented with the **Agent manager desktop**, defaulted to the **Agents** folder page.

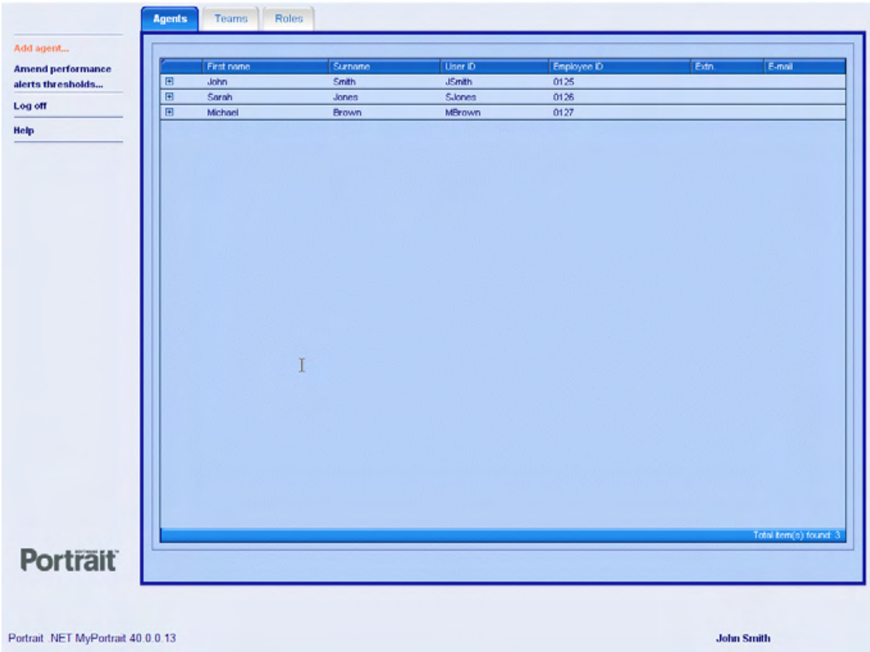
3 Desktop

3.1 Overview

The desktop has the following three pages.

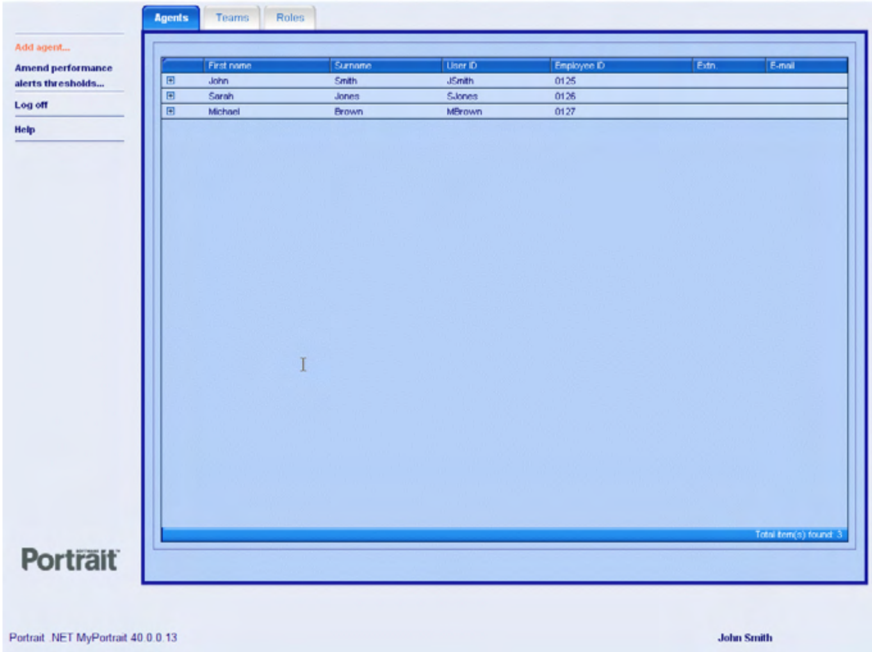
- **Agents** - lists the agents who have been entered on the system, and enables the user to add agents and to maintain their details.
- **Teams** - lists the teams who have been entered on the system, and enables the user to add teams and to maintain their details.
- **Roles** - lists the roles which have been configured for the system, and enables the user to assign agents to each role.

Figure 2 –Desktop



3.2 Agents page

Figure 3 – Agents page



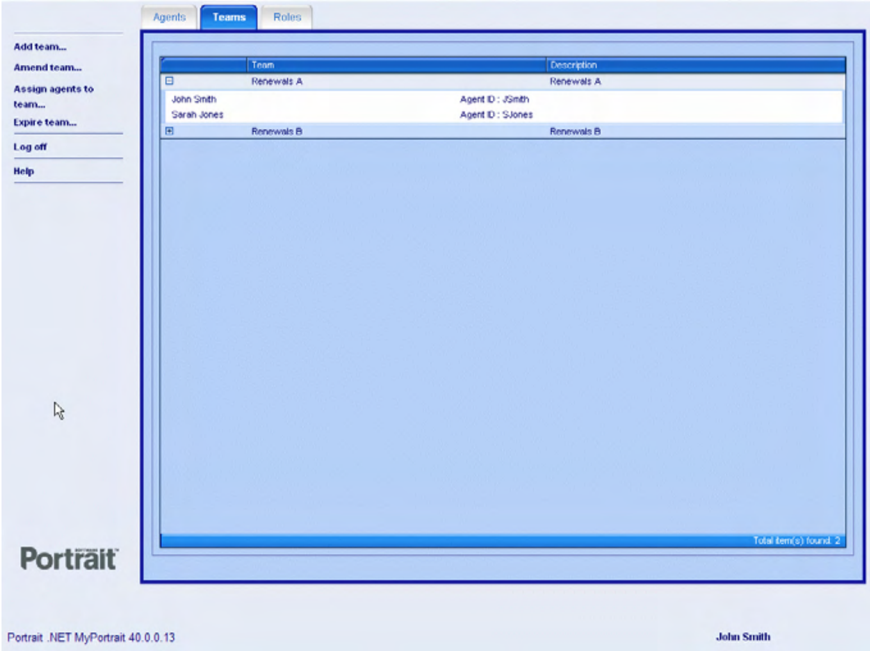
Select an agent in the list by clicking on it. Click on the "+" icon to expand a row to show the roles assigned to the agent, and the teams to which he belongs.

The following functions are available from the **Actions menu**.

- **Add agent** - sets up a new agent.
- **Amend agent** - amends the selected agent's details.
- **Amend performance alerts thresholds -** sets performance thresholds for the selected agent.
- **Amend telephony details** - sets the telephony details for the selected agent.
- **Assign roles** - sets the roles assigned the selected agent.
- **Assign teams** - sets the teams to which the selected agent belongs.
- **Expire agent** - expires the selected agent.
- **View agent's history** - displays the history of changes to the selected agent's details.

3.3 Teams page

Figure 4 Teams page

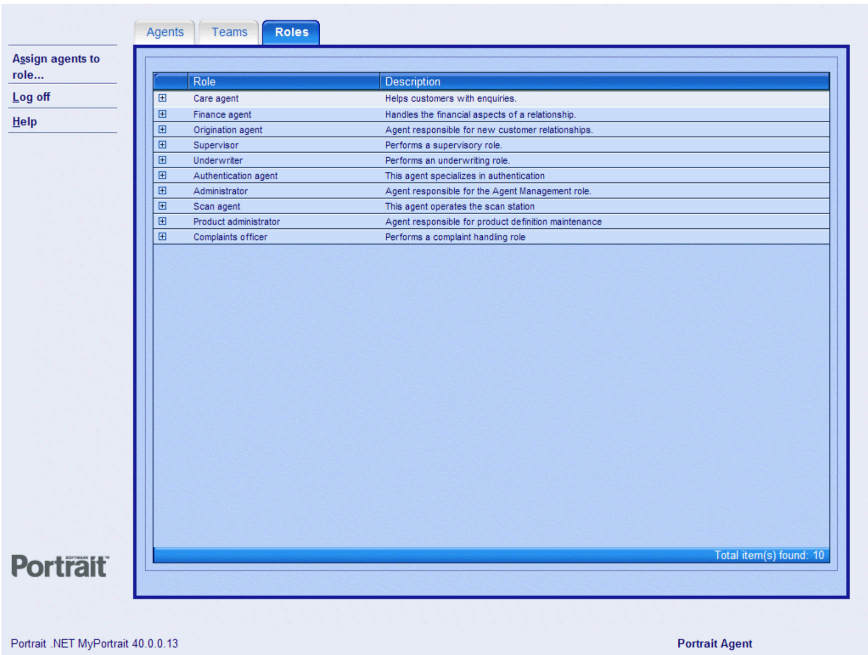


The following functions are available from the **Actions menu**.

- **Add team** - sets up a new team.
- **Amend team** - amends the selected team's details.
- **Assign agents to team** - assigns and de-assigns agents to the selected team.
- **Expire team** - expires the selected team.

3.4 Roles page

Figure 5 –Roles page



The only function available on the **Roles** page is to assign agents to the selected role.

The list of roles is built in Configuration Suite, and cannot be changed from within Agent Manager.

4 Actions

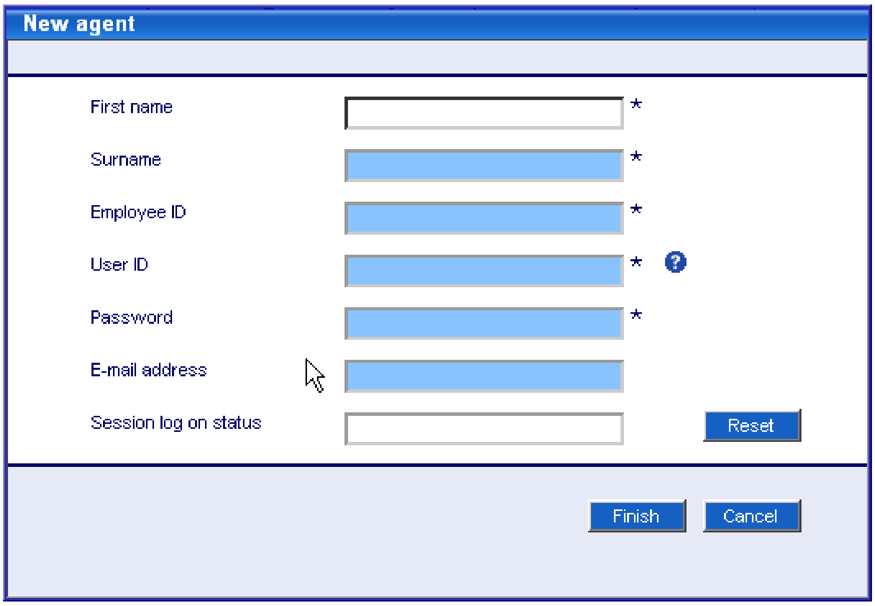
4.1 Agent page actions

4.1.1 Introduction

This section describes each of the actions available in the **Agents page**.

4.1.2 Add agent

Figure 6 -New agent dialog

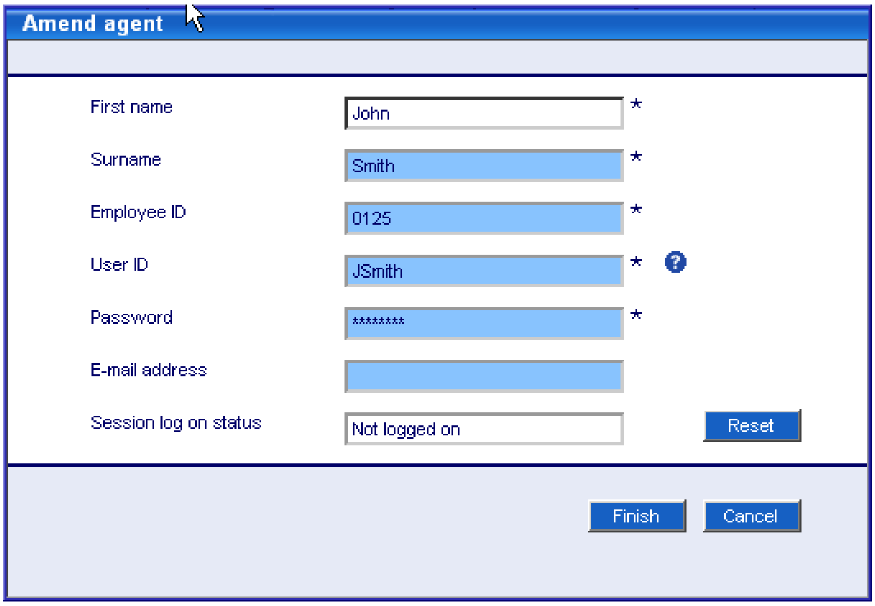


The following details must be added for each agent.

- First name
- Surname
- Employee identifier
- User identifier
- Password
- Optionally an e-mail address can be entered if required. This would be used, for example, for agents who needed to give their e-mail address to customers.
- These details enable the Agent to log on to the Contact Centre in manual telephony mode. To use the Contact Centre in telephony mode, that is, with a telephony server, the telephony details must also be set up. (Refer to page 13.)

4.1.3 Amend agent

Figure 7 - Amend agent dialog

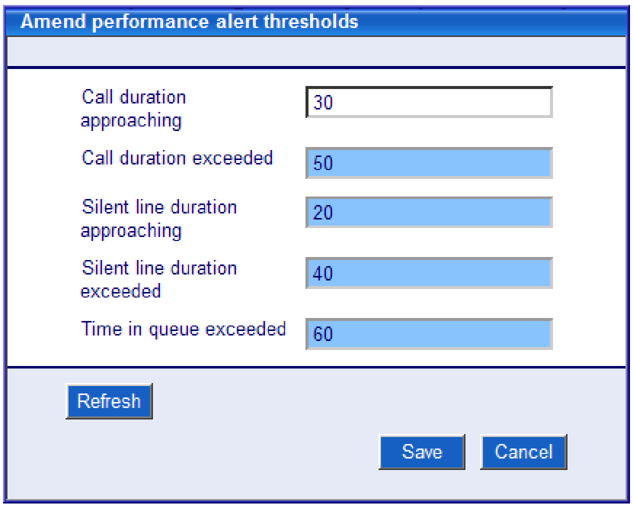


The following details about an agent can be amended.

- First name
- Surname
- Employee identifier
- User identifier
- Password
- E-mail address
- The field **Session log on status** indicates whether the agent is currently logged on to Portrait. An agent can have only one log on to the contact centre at a time. The **Reset** button should be used to clear a spurious logged on status resulting from a system malfunction.

4.1.4 Amend performance alerts thresholds

Figure 8 -Amend performance alert thresholds dialog



This action provides a mechanism to warn a call centre agents (through icons appearing on the desktop) when certain pre-defined telephony parameters have been reached. The alerts are only applicable when telephony is enabled.

Click **Amend performance alert thresholds** in the action space. The Amend performance alert thresholds dialog is displayed.

Amend the number of minutes required for:

- Call duration approaching

  This is used to set the time (in seconds) to warn an agent involved in a customer engagement (by way of an icon appearing on the desktop) that the recommended call duration is approaching.
- Call duration exceeded

  This is used to set the time (in seconds) to warn an agent involved in a customer engagement (by way of an icon appearing on the desktop) that the recommended call duration has been exceeded.
- Silent line duration approaching

  This is used to set the time (in seconds) to warn an agent involved in a customer engagement (by way of an icon appearing on the desktop) that the recommended call duration that a particular customer has been on hold is approaching.
- Silent line duration exceeded

  This is used to set the time (in seconds) to warn an agent involved in a customer engagement (by way of an icon appearing on the desktop) that the recommended call duration that a particular customer has been on hold has been exceeded.
- Time in queue exceeded

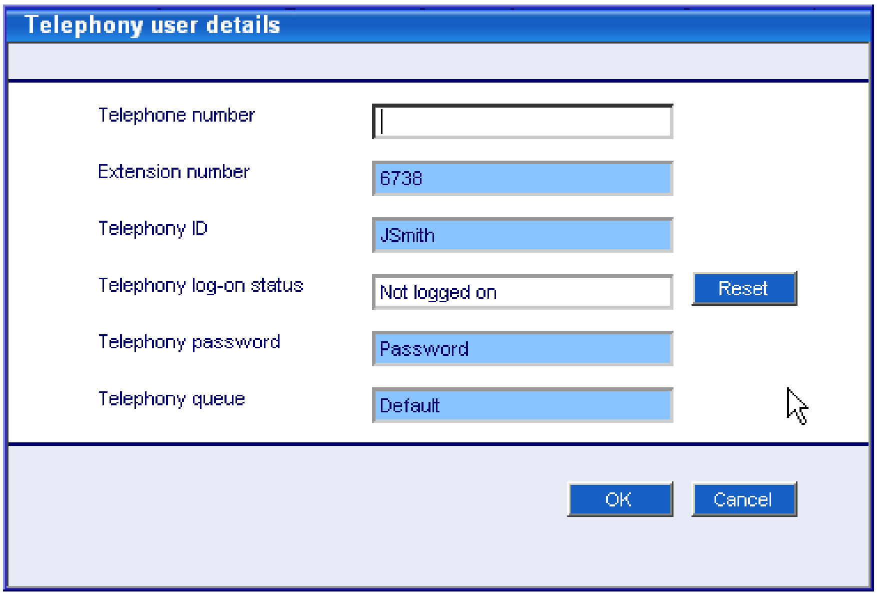
  This parameter specifies the maximum acceptable time a customer is left waiting in a queue. If this time has been exceeded before the call is taken, then an icon appears on the desktop warning the agent that the customer has been waiting longer that what is considered acceptable.

You can click **Refresh** to change amendments back to the default value of 100 seconds in each field. You can click **Cancel** to return to the **Agents** page without saving. Click **Save** to save amended thresholds. A confirmation message is then displayed, click **OK** to return to the **Agents** page.

The performance alerts thresholds default to 100. If the **Refresh** button is clicked after the settings have been amended, they will return to the default values. Clicking **Save** will save the new settings and return the user to the **Agents** folder page. Clicking **Cancel** will return the user without saving amendments.

4.1.5 Amend telephony details

Figure 9 – Telephony user details dialog

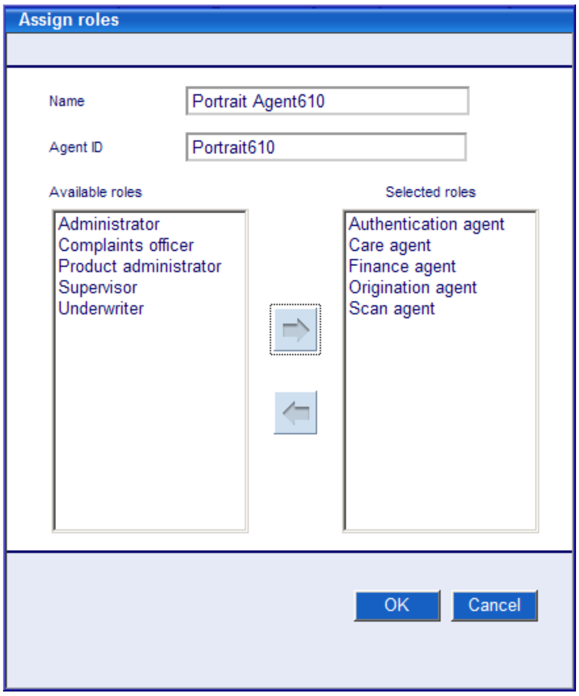


The following telephony details can be set.

- Agent telephone number
- Agent extension
- Telephony ID, that is the ID set up on the telephony server
- Telephony password
- Telephony queue
- The field **Telephony log-on status** displays the current status on the telephony server for the agent. The **Reset** button should be used to clear a spurious logged on status resulting from a system malfunction.

4.1.6 Assign roles

Figure 10 -Assign roles dialog

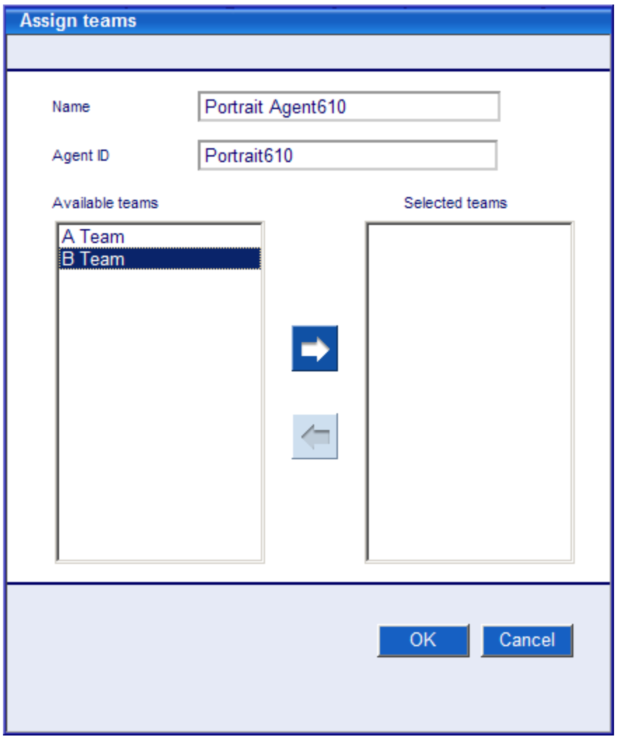


The **Assign roles** action enables the agent manager to assign or de-assign a predefined role or roles to an agent.

Select the required roles from the list of **Available roles** on the left-hand side, and use the right arrow button to add them to the roles assigned to the agent. Use the left arrow button to remove roles from the list of **Selected roles**.

4.1.7 Assign teams

Figure 11 -Assign teams dialog

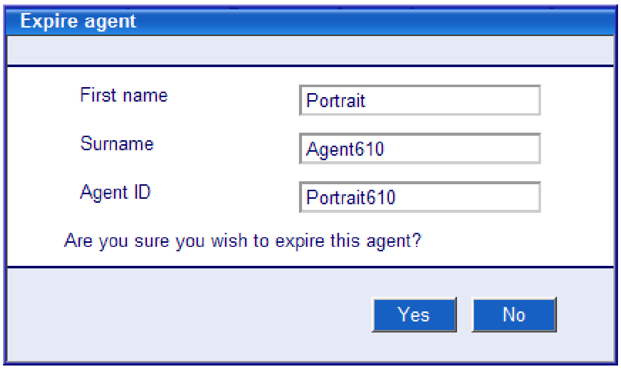


The **Assign teams** action enables the agent manager to assign or de-assign a predefined team or teams to an agent.

Select the required teams from the list of **Available teams** on the left-hand side, and use the right arrow button to add them to the teams assigned to the agent. Use the left arrow button to remove teams from the list of **Selected teams**.

4.1.8 Expire agent

Figure 12 -Expire agent dialog

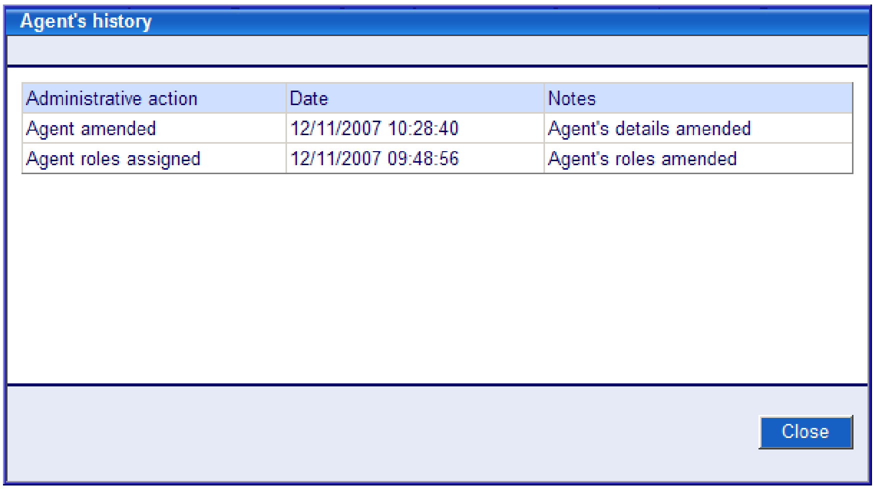


This action enables the agent manager to expire an agent.

The agent manager confirms expiry of this agent and concludes the dialog by clicking **Yes**. This updates the **Agents** folder page and removes the reference to the expired agent. Clicking **Cancel** will return the user to the **Agents** folder page without expiring the agent.

4.1.9 View agent's history

Figure 13 -Agent history dialog



The **View agent's history** action enables the agent manager to view the history of an agent's sessions. Details of the engagement, duration, date and notes are displayed in a table.

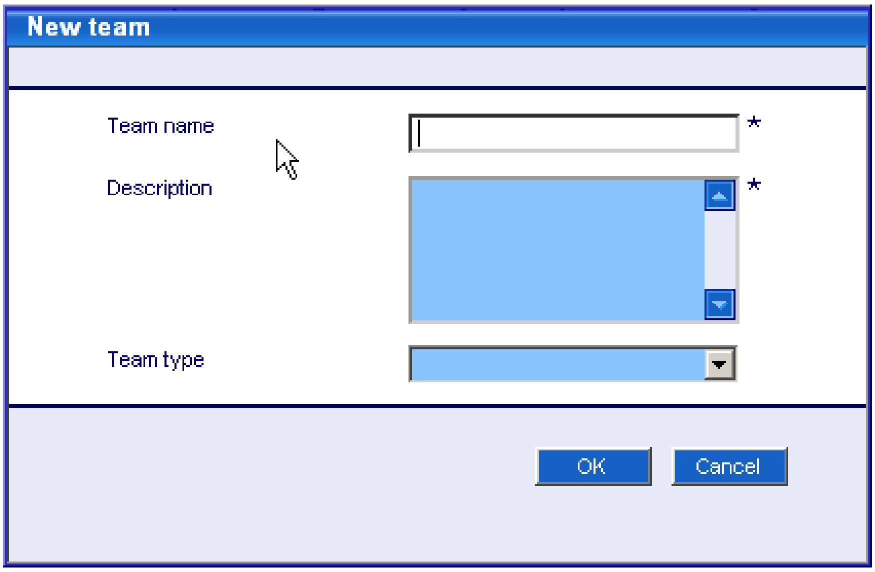
4.2 Team page actions

4.2.1 Introduction

This section describes each of the actions available in the **Teams page**.

4.2.2 Add team

Figure 14 -New team dialog

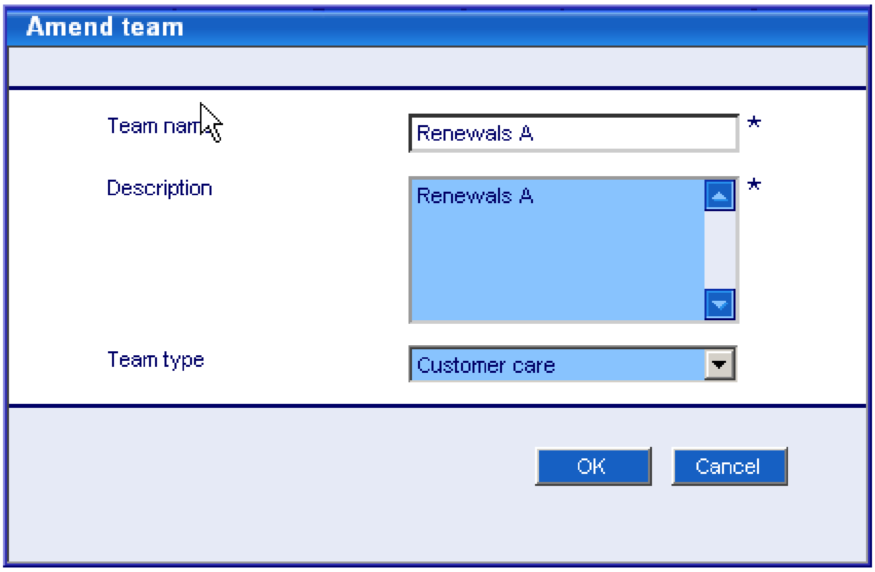


To set up a team, the user must enter a **Team name** and Description.

Optionally, he may enter a **Team type**. The **Team type** is used in functionality which routes workflow according to team responsibilities.

4.2.3 Amend team

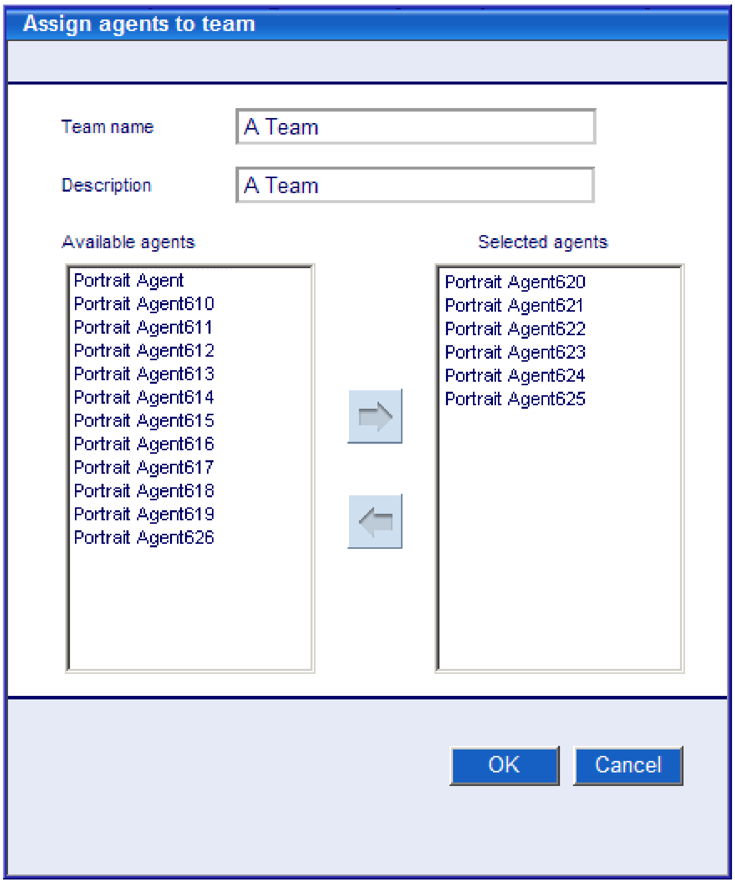
Figure 15 -Amend team dialog



Any of the details may be amended as required.

4.2.4 Assign agents to team

Figure 16 –Assign agents to team dialog



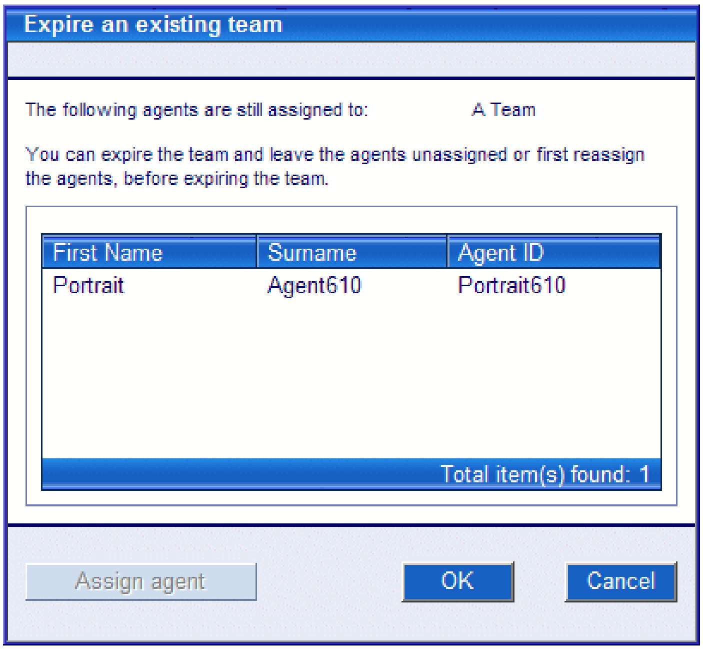
The **Assign agents to team** action enables the agent manager to assign or de-assign a selected team with an agent or agents.

Select the required agents from the list of **Available agents** on the left-hand side, and use the right arrow button to add them to the agents assigned to the team. Use the left arrow button to remove agents from the list of **Selected agents**.

4.2.5 Expire team

This action enables the agent manager to expire a team. From the **Teams** folder page, the agent manager selects a team and invokes the **Expire team** action. The **Expire team** dialog is launched. This dialog displays the names of agents who are not assigned to any other team.

Figure 17 Expire team dialog



If no agents are present in the table, a confirmation message box is launched instead of this dialog. Clicking **Yes** on the message box will expire the selected team. Clicking **No** will return the user without saving any changes.

If agents are present, they can be assigned to another team via the **Assign Agent** button. Clicking this button will launch the **Assign team** dialog as described in Assign teams on page 16.

The agent manager confirms expiry of this team by clicking **OK**. This updates the **Agents** folder page and removes the reference to the expired team.

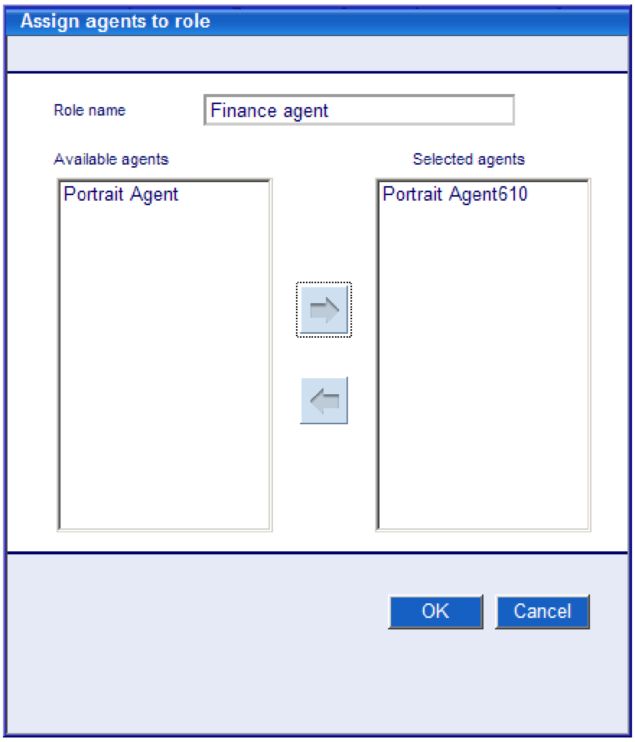
4.3 Role page actions

4.3.1 Introduction

This section describes each of the actions available in the **Roles page**.

4.3.2 Assign agents to role

Figure 18 –Assign agents to role dialog



This action enables the agent manager to assign or de-assign a selected role to an agent or agents.

Select the required agents from the list of **Available agents** on the left-hand side, and use the right arrow button to add them to the agents assigned to the role. Use the left arrow button to remove agents from the list of **Selected agents**.