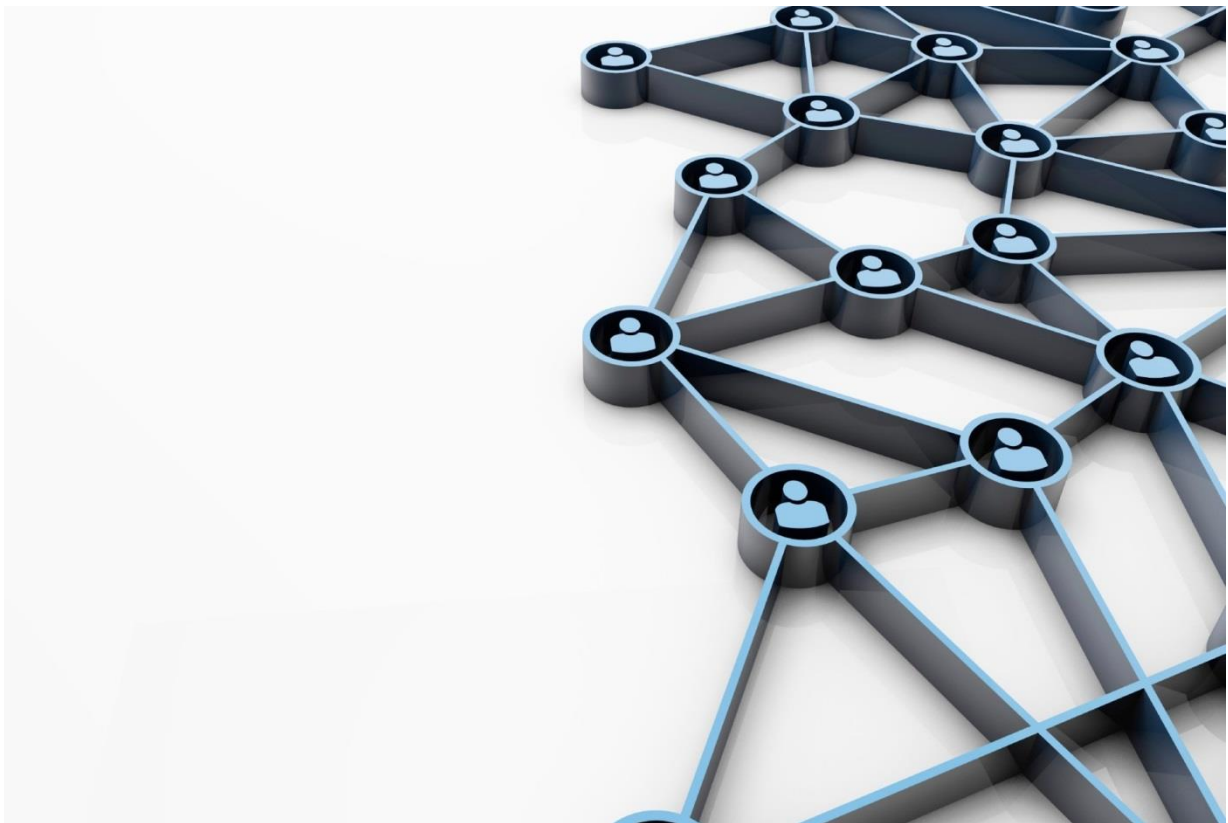


Integrated Automatic Call Distribution (iACD) for Supervisors

Quick Reference Guide



**Version 1.0
October 9, 2017**

Revision History

Revision	Date	Description	Initials
1.0	10/9/17	First published version.	CS

Purpose

Use this guide to learn how to configure and supervise use of Integrated Automatic Call Distribution (iACD).

Audience

Information in this document is for supervisors of Integrated Automatic Call Distribution systems.

References

Refer to the guide below for more information about Integrated Automatic Call Distribution:

Integrated Automatic Call Distribution for Agents Quick Reference Guide

CommPortal Administrator Guide

Contents

Overview	4
Log In	5
Logged In Status	7
View an Agent's Logged In Status	7
Change an Agent's Logged In Status	9
MLHG Lines	10
Add Line to MLHG	10
Change Line Position	12
Remove Lines from an MLHG	14
Supervisor Dashboard	15
Queue View	16
Agent View	17
Settings View	19
Reports	20
Create and Schedule Reports	20
Create an On-Demand Report	22
Monitor, Whisper, and Barge-In	26

Overview

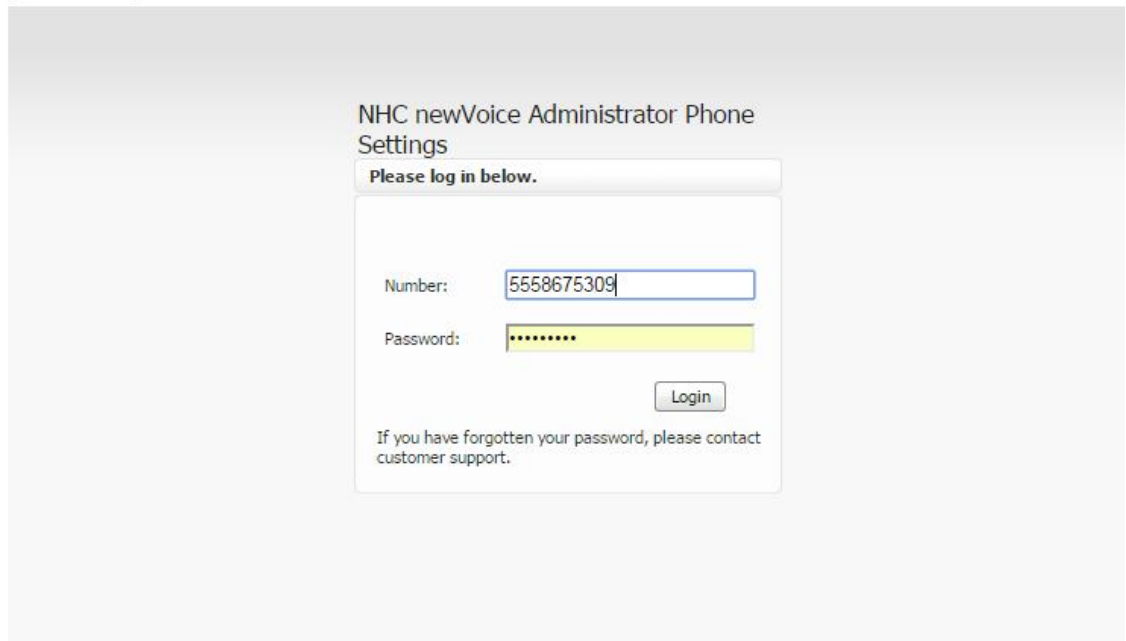
This quick reference guide explains how to view and manage iACD information in NHC's CommPortal:

- Log into CommPortal as Business Group Administrator
- Log into Supervisor Dashboard
- Viewing Logged In status from CommPortal
- Changing Logged In status from CommPortal
- Adding Lines to iACD
- Changing Line Position in iACD
- Removing Lines from iACD
- Navigating Supervisor Dashboard
- Queue View
- Agent View
- Settings View
- Schedule Reports
- On Demand Reports
- Monitor, Whisper, and Barge-in

Log In

To log into CommPortal as a business group administrator:

1. Open a web browser.
2. Navigate to <https://commportal.nhcgrp.com/bg/>.

A screenshot of the NHC newVoice Administrator Phone Settings login page. The page has a light gray background. At the top, the text "NHC newVoice Administrator Phone Settings" is displayed. Below this, a white box contains the login form. The form has a header that says "Please log in below." followed by two input fields: "Number:" with the value "5558675309" and "Password:" with a masked password "*****". A "Login" button is located below the password field. At the bottom of the form, a note reads: "If you have forgotten your password, please contact customer support."

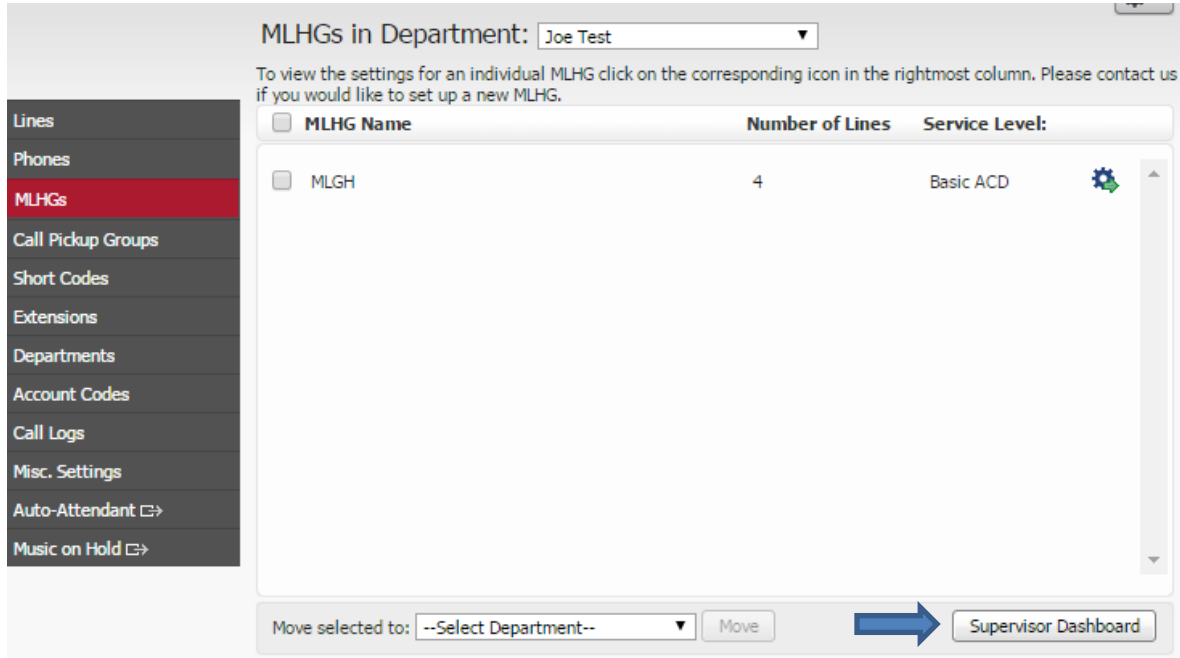
3. Enter the following information:
Number – Your 10-digit telephone number
Password – Your CommPortal password

From CommPortal, open the Supervisor Dashboard:

1. Click **MLHGs** in the left menu.


CommPortal's list of Multi-Line Hunt Groups opens.


2. Click **Supervisor Dashboard** at the lower right.



MLHGs in Department: Joe Test

To view the settings for an individual MLHG click on the corresponding icon in the rightmost column. Please contact us if you would like to set up a new MLHG.

<input type="checkbox"/>	MLHG Name	Number of Lines	Service Level:
<input type="checkbox"/>	MLGH	4	Basic ACD 

Move selected to: --Select Department-- Move  Supervisor Dashboard

Supervisor Dashboard opens in a new window.

Logged In Status

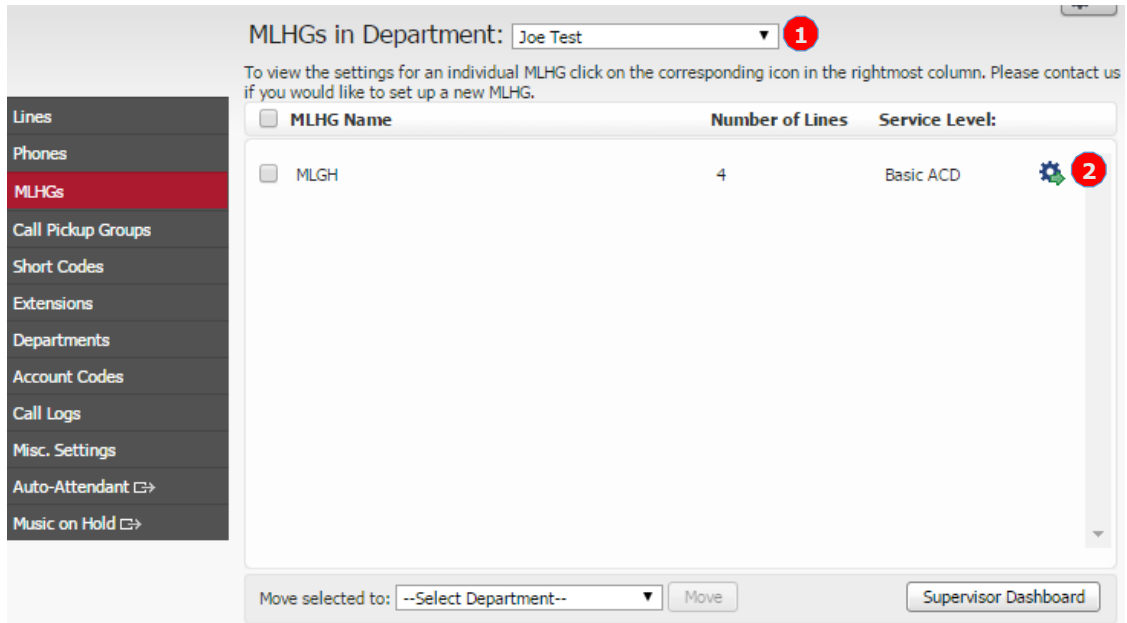
Guidance for supervisor's logged in status contains these topics:

- View Agents' Logged In Status
- Change Agents' Logged In Status

View an Agent's Logged In Status

To view each agent's logged in status:

1. If applicable, select the appropriate department in the drop-down list next to MLHGs in Department.



The screenshot shows a web interface for managing MLHGs (Multi-Line Hold Groups) in a department. On the left is a sidebar menu with options: Lines, Phones, MLHGs (highlighted in red), Call Pickup Groups, Short Codes, Extensions, Departments, Account Codes, Call Logs, Misc. Settings, Auto-Attendant, and Music on Hold. The main content area is titled "MLHGs in Department:" and features a dropdown menu currently set to "Joe Test", marked with a red circle and the number 1. Below the title is a table with columns: MLHG Name, Number of Lines, and Service Level. The table contains one entry: "MLGH" with 4 lines and "Basic ACD" service level. To the right of this entry is a gear icon, marked with a red circle and the number 2. Above the table, a note states: "To view the settings for an individual MLHG click on the corresponding icon in the rightmost column. Please contact us if you would like to set up a new MLHG." At the bottom of the interface, there is a "Move selected to:" dropdown menu set to "--Select Department--", a "Move" button, and a "Supervisor Dashboard" button.









MLHG Name	Number of Lines	Service Level:
MLGH	4	Basic ACD

2. Click the gear icon  on the right.

The MLHG Lines tab opens.

MLHG MLGH in Department: None

MLHG Pilots **MLHG Lines** Settings

<input type="checkbox"/>	Position	Telephone Number	Extension	Name	Department	
<input type="checkbox"/>	1	516 8880	8880	 Joe Test	Dept 1	
<input type="checkbox"/>	2	779 6013	6013	 7796013	Dept 1	
<input type="checkbox"/>	3	779 6011	6011	 Standard Seat	Dept 1	
<input type="checkbox"/>	4	222 0905	0905	 Test 3	Dept 1	

Remove Selected Change Positions Add Lines Add single line: Add

A green arrow next to an agent's name indicates logged in; a red arrow indicates logged out.









Change an Agent's Logged In Status

To change an agent's logged in status:

1. In the MLHG Lines tab, click the red or green icon next to the agent's name.

MLHG MLGH in Department: None

MLHG Pilots **MLHG Lines** Settings

<input type="checkbox"/>	Position	Telephone Number	Extension	Name	Department	
<input type="checkbox"/>	1	516 8880	8880	 Joe Test	Dept 1	
<input type="checkbox"/>	2	779 6013	6013	 7796013	Dept 1	
<input type="checkbox"/>	3	779 6011	6011	 Standard Seat	Dept 1	
<input type="checkbox"/>	4	222 0905	0905	 Test 3	Dept 1	

Remove Selected Change Positions Add Lines Add single line: Add

Edit Line dialog appears.

Edit Line
Change the line configuration and then click apply.

Telephone Number

Login/Logout supported? ☒

Logged in? ☐

Apply Cancel

2. Check or uncheck box labeled *Logged in?*
3. Click **Apply**.

Dialog closes, and agent's status changes accordingly in the MLHG Lines tab.

MLHG Lines

Guidance to manage MLHG lines contains these topics:

- Add Line to MLHG
- Change Line Position
- Remove Lines

Add Line to MLHG

To add one or more lines to an MLHG:

1. Click **MLHGs** in the left menu.
List of MLHGs opens.
2. Click the gear icon to the right of the desired MLHG.
MLHG Lines tab displays a list of lines in the MLHG.

NHC Hosted 6000
MLHG Test MLGH in Department: None

MLHG Pilots **MLHG Lines** Settings

<input type="checkbox"/>	Position	Telephone Number	Extension	Name	Department	
<input type="checkbox"/>	1	(508) 779 6010	6010	Call Router	None	
<input type="checkbox"/>	2	(595) 222 0900	0900	NHC Hosted 6000	None	
<input type="checkbox"/>	3	(595) 222 0901	0901	00:04:F2:DD:64:2C	Dept 1	

Remove Selected Change Positions Add Lines Add single line: Add

3. In the MLHG Lines tab, click **Add Lines** at the bottom.

Add Lines to MLHG panel appears.

Add Lines to MLHG

Select the lines by ticking the boxes and then click Add Selected. Lines added to this MLHG are allowed to login/logout. When you add a line, it will initially be logged out.

Department: Joe Test ▼

<input type="checkbox"/>	Telephone Number	Extension	Name
<input checked="" type="checkbox"/>	(595) 222 0900	0900	NHC Hosted 6000
<input type="checkbox"/>	(595) 222 0902	0902	AA
<input type="checkbox"/>	(595) 222 0903	0903	NHC Admin
<input type="checkbox"/>	(595) 222 0904	0904	Easy Attendant

Add Selected
Cancel

4. Check the lines you want to add, or check the top box to select all lines.

Note: Line list contains all telephone numbers in the business group not already assigned to an MLHG.

5. Click **Add Selected** at the bottom right.

Add Lines to MLHG closes. Added line or lines appear in the MLHG Lines tab.







Change Line Position

To change line positions in an MLHG:

1. Click **MLHGs** in the left menu.
List of MLHGs opens.
2. Click the gear icon to the right of the desired MLHG.
MLHG Lines tab displays a list of lines in the MLHG.

NHC Hosted 6000
MLHG Test MLGH in Department: None

MLHG Pilots **MLHG Lines** Settings

<input type="checkbox"/>	Position	Telephone Number	Extension	Name	Department	
<input type="checkbox"/>	1	(508) 779 6010	6010	 Call Router	None	
<input type="checkbox"/>	2	(595) 222 0900	0900	 NHC Hosted 6000	None	
<input type="checkbox"/>	3	(595) 222 0901	0901	 00:04:F2:DD:64:2C	Dept 1	

Remove Selected Change Positions Add Lines Add single line: Add

3. Click **Change Positions** at the bottom.

Change Line Positions in MLHG panel appears, with up and down arrows in the Position column on the left.

Change Line Positions in MLHG

Use the up/down arrow icons in the Position column to change the order in which the hunt algorithm selects non-busy lines to pass incoming calls to. Click Apply when you have finished.

Position	Telephone Number	Extension	Name	Department
1	(595) 222 0900	0900	NHC Hosted 6000	None
2	(595) 222 0901	0901	00:04:F2:DD:64:2C	Dept 1

Apply
Cancel

4. Click the appropriate arrow to move a line's position in the list up or down.
 5. Click **Apply** at the bottom right.
- The panel closes, and reordered lines appear in the MLHG Lines tab.

Remove Lines from an MLHG

To remove one or more lines from an MLHG:

1. Click **MLHGs** in the left menu.
List of MLHGs opens.
2. Click the gear icon to the right of the desired MLHG.
MLHG Lines tab displays a list of lines in the MLHG.

NHC Hosted 6000
MLHG Test MLGH in Department: None

MLHG Pilots **MLHG Lines** Settings


<input type="checkbox"/>	Position	Telephone Number	Extension	Name	Department
<input type="checkbox"/>	1	(595) 222 0900	0900	NHC Hosted 6000	None
<input checked="" type="checkbox"/>	2	(595) 222 0901	0901	00:04:F2:DD:64:2C	Dept 1

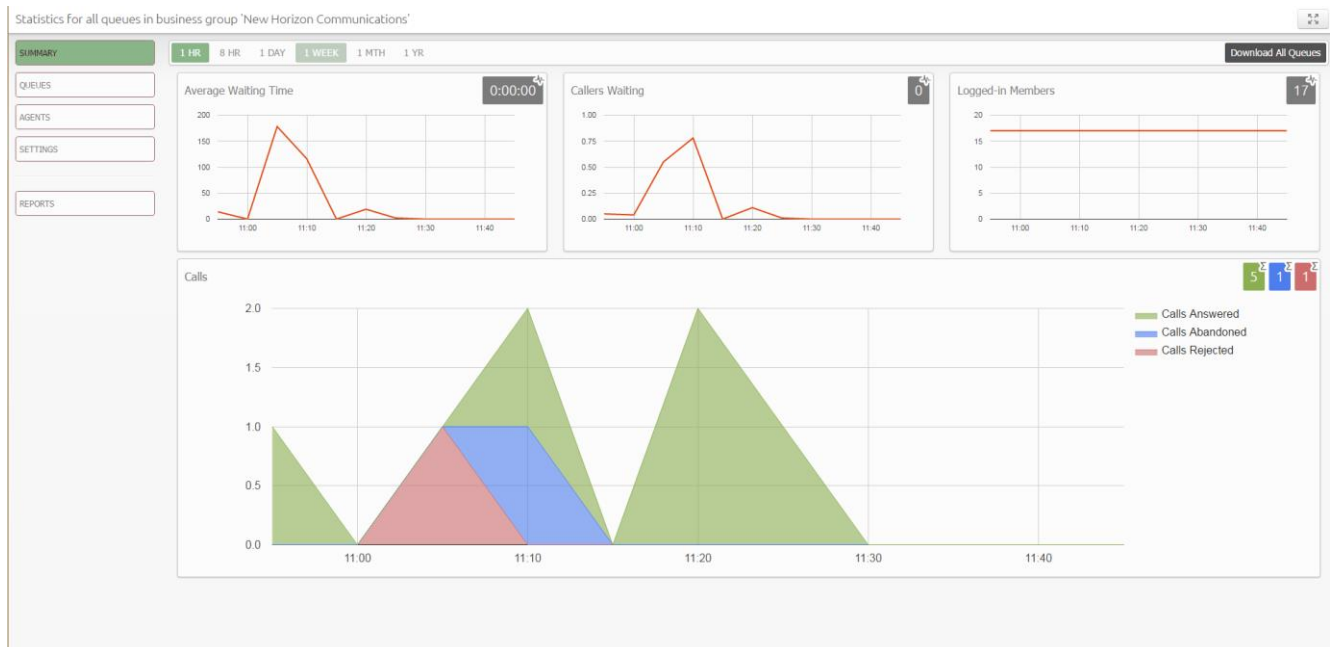
Remove Selected Change Positions Add Lines Add single line: Add

3. Check the lines you wish to remove, or check the top box to select all lines.
4. Click **Remove Selected** at the bottom left.
Selected lines no longer appear in the MLHG Lines tab.

Supervisor Dashboard

Note the following items on the Supervisor Dashboard summary view.

- Click the menu  icon to toggle options in the left menu.
- Click **Download All Queues** under the menu icon to download the most current information as a .csv file.
- Use the left menu to navigate the Supervisor Dashboard's different views.
- Change the time frame for data from the selections at the top left.
- View queue status in the Calls pane.



Guidance for navigating the Supervisor Dashboard contains these sections:

- Queue View
- Agent View
- Settings View

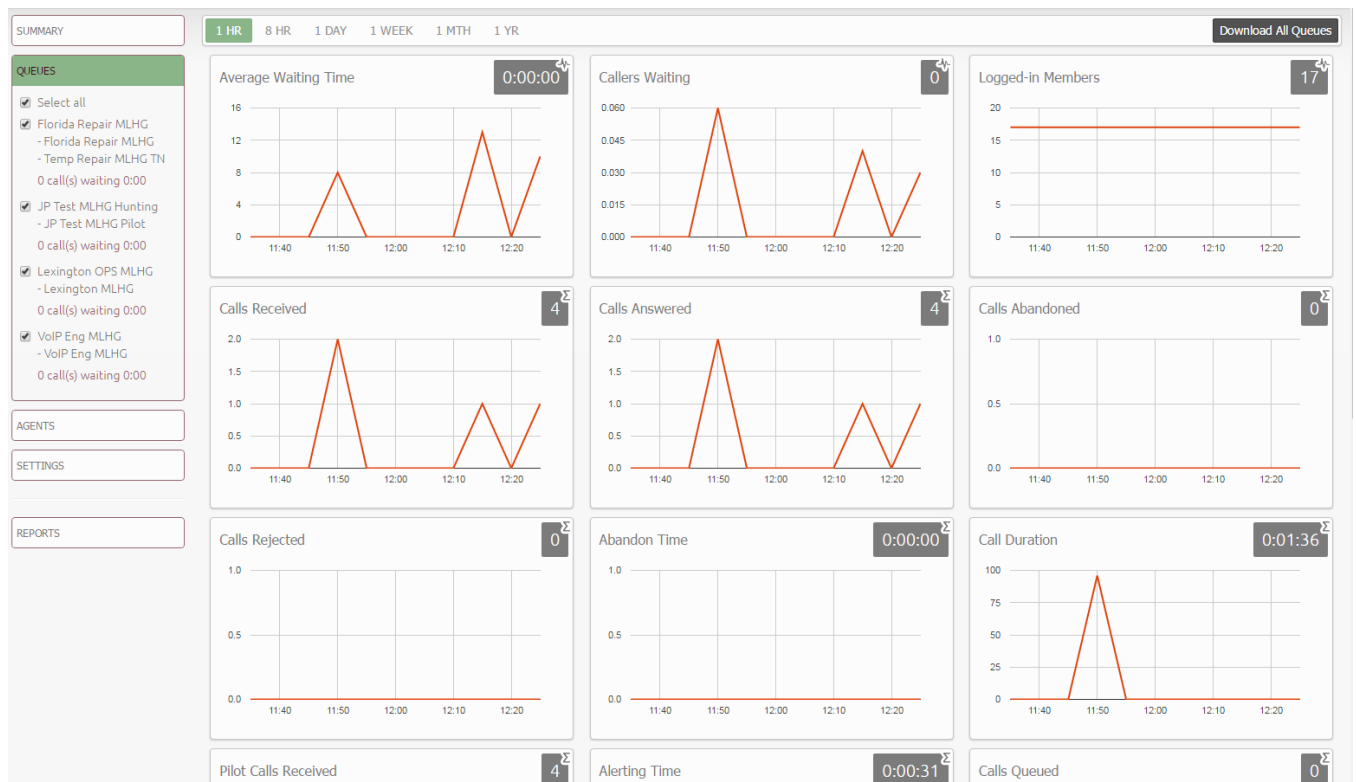
Queue View

Queue view contains these controls and panes:

- The left pane shows all the queues in your business group. It also shows calls waiting in the queue, and longest time a call has been in queue.

Note: If you check all boxes under QUEUES, information presented on the screen compiles data for all queues. To view information for individual queues, check one box at a time.

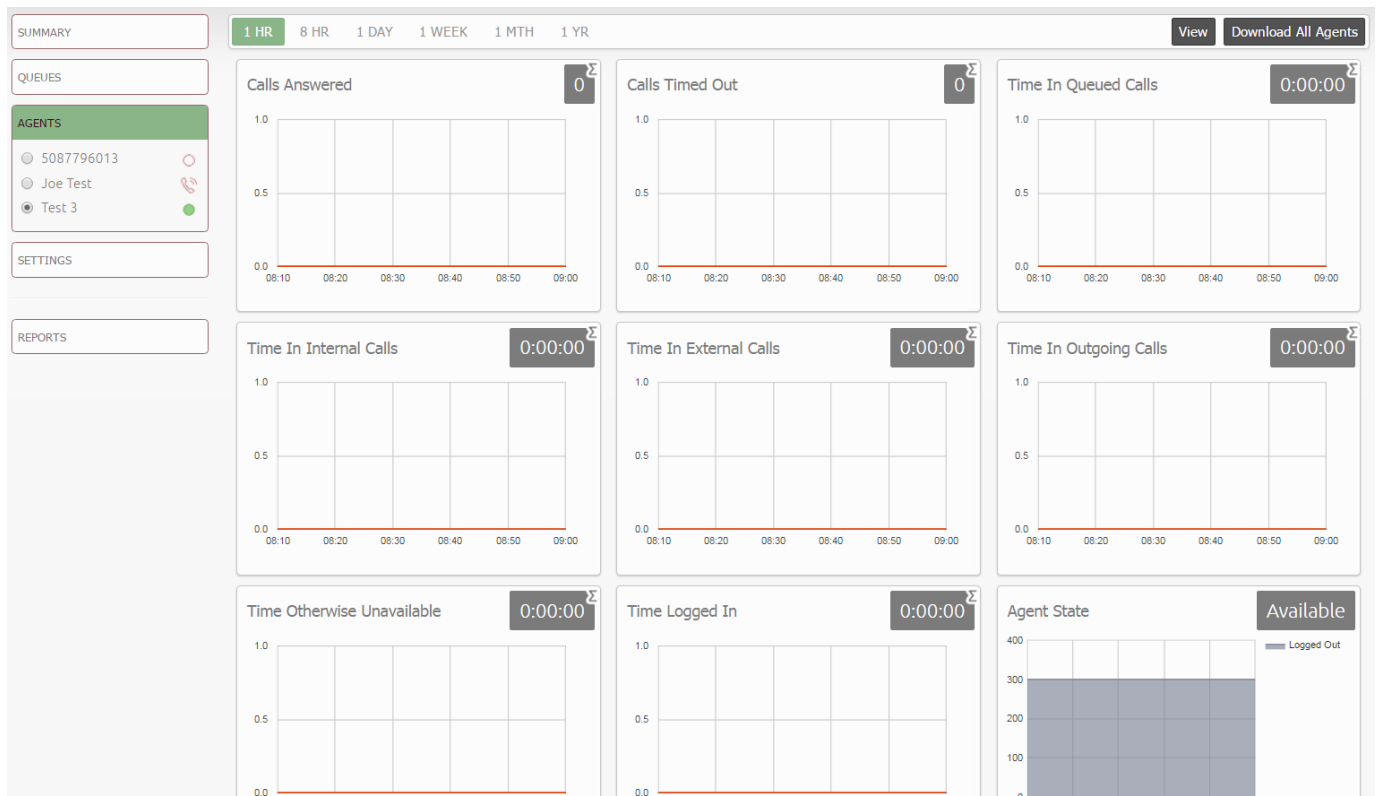
- Click **Download All Queues** at the top right to download the most current information as a .csv file.
- Select time frame for data display at the top left of the data area.
- Main data display contains information for queues selected in the left pane.




Agent View

Agent view contains these controls and panes:

- Agents list in the left pane shows each agent's status: Logged In, Logged Out, or On Call.
- Use the radio buttons on the left to select the agent whose data you wish to view in the main data pane.
- Click **Download All Queues** to download the most current information as a .csv file.
- Select time frame for data display at the top left of the data area.
- Main data display contains information for agent selected in the left pane.



Manage agents via the Agents view, and the Agent Status portal for individual agents:

- Use the radio buttons on the left to select the agent whose data you wish to view in the main data pane.
- Click **View** at the upper right. The agent's portal appears with the title, Agent Status.
- Use the *Current state* drop-down list to change the agent's status.
- Click the icon  in My Queues to log the agent in or out of a queue.


Agent Status

Logged in as: Test 3

Current state: Available

Administrators are not allowed to view incoming call details.

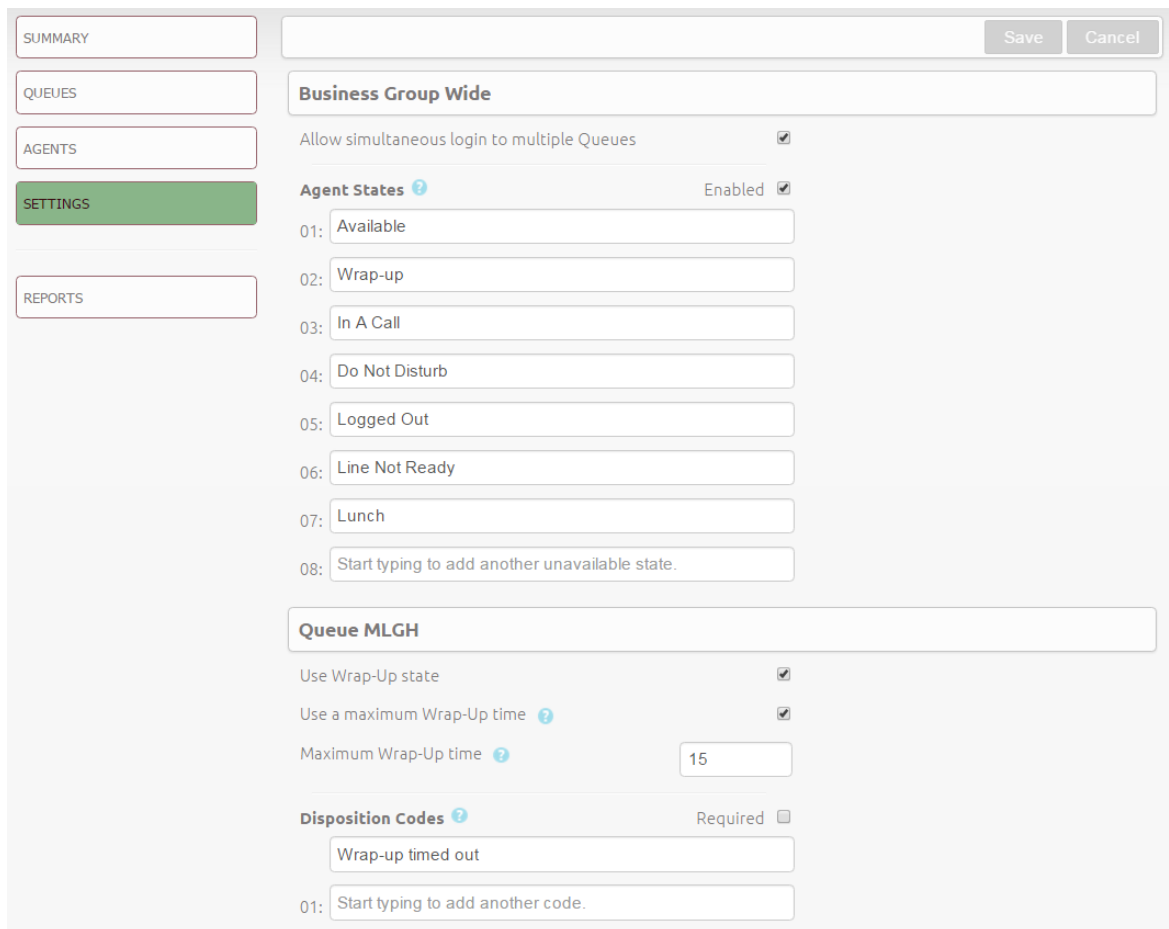
My Queues

	Avg. Waiting Time	Callers Waiting	Logged-in Members	Queue Status
MLGH	0:00	0	3	Logged In 

Settings View

Use the settings view for access to administrative tools. Note these elements of the settings view:

- Click **SETTINGS** in the left menu to open the settings view.
- Add, modify, or remove agent statuses in the Agent States section. Common states – such as Available, Wrap up, and In A Call – appear by default.
- Activate and configure wrap up options, and add disposition codes in the Queue MLHG section.
- Click **Save** at the upper right to save your configuration.



The screenshot displays the 'Settings View' interface. On the left is a vertical menu with buttons for SUMMARY, QUEUES, AGENTS, **SETTINGS** (highlighted in green), and REPORTS. The main content area is titled 'Business Group Wide' and contains two sections: 'Agent States' and 'Queue MLHG'.

Agent States section:

- 'Allow simultaneous login to multiple Queues' is checked.
- 'Agent States' is 'Enabled' (checked).
- There are eight input fields for agent states:
 - 01: Available
 - 02: Wrap-up
 - 03: In A Call
 - 04: Do Not Disturb
 - 05: Logged Out
 - 06: Line Not Ready
 - 07: Lunch
 - 08: Start typing to add another unavailable state.

Queue MLHG section:

- 'Use Wrap-Up state' is checked.
- 'Use a maximum Wrap-Up time' is checked.
- 'Maximum Wrap-Up time' is set to 15.
- 'Disposition Codes' are 'Required' (checked).
- There are two input fields for disposition codes:
 - Wrap-up timed out
 - 01: Start typing to add another code.

At the top right of the main content area are 'Save' and 'Cancel' buttons.

Reports

Use the iACD supervisor dashboard to create and view reports related to call distribution and handling. Guidance for reports contains these sections:

- Create and Schedule Reports
- Create an On-Demand Report
- Monitor, Whisper, and Barge-In

Create and Schedule Reports

To create and schedule regular reports:

1. Click **REPORTS** in the left menu.
ACD Report Scheduling appears.

ACD Report Scheduling
Add a new report

Welcome '3157157570',
Your scheduled reports are listed below. Schedule a new report with the button in the top right.

test All queues - Calls by Day	Scheduled: One Off Period: 05/12/2016 - 05/12/2016	Edit Delete
--	---	----------------

2. Click **Add a new report** at the upper left.
Reports for business group appears:

Reports for business group 'Joe Test'
Save Cancel

Report Title: Test
Report Type: Calls by Day
Select Data: All queues
Schedule: Daily
Send to: test@nhcgrp.com

Data range
Next Due: 05/12/2016
Start of day: 00 : 00
End of day: 24 : 00
M T W T F S S

The Calls by Day report shows a summary of the call activity for all queues by day. Only calls that arrive via queues will be included, for example outgoing or direct-dialled calls are not displayed. Any activity outside of the start/end of day and from unselected days of the week is not included in the results. **The end date is in the future: only showing historical data. Calls made within the last 5 minutes may not have been processed and will not appear.** All times are in (GMT-5.00) America/Eastern.

Update Report

3. Enter the *Report Title*.

4. Select *Report Type* from the drop-down list.
5. Select data sources from the *Select Data* drop-down list.
6. Select report frequency from the *Schedule* drop-down list.
7. Select *Start of day* and *End of day* under *Data range* to define the time period for each report.
8. Enter email address for report's recipient in *Send to* field.
9. Click **Save** at the upper right to save the report configuration.

Note: Single reports set for the future appear after the time period set for the report has passed.

Create an On-Demand Report

To generate an on-demand report in the supervisor dashboard:

1. Click **REPORTS** in the left menu.

ACD Report Scheduling appears.

ACD Report Scheduling
Add a new report

Welcome '3157157570',
Your scheduled reports are listed below. Schedule a new report with the button in the top right.

test All queues - Calls by Day	Scheduled: One Off Period: 05/12/2016 - 05/12/2016	Edit Delete
--	---	----------------

2. Click **Add a new report** at the upper left.

Reports for business group appears:

Reports for business group 'Joe Test'
Save Cancel

Report Title: Test
Report Type: Calls by Day
Select Data: All queues
Schedule: Daily
Send to: test@nhcgrp.com

Data range
Next Due: 05/12/2016
Start of day: 00 : 00
End of day: 24 : 00
M T W T F S S

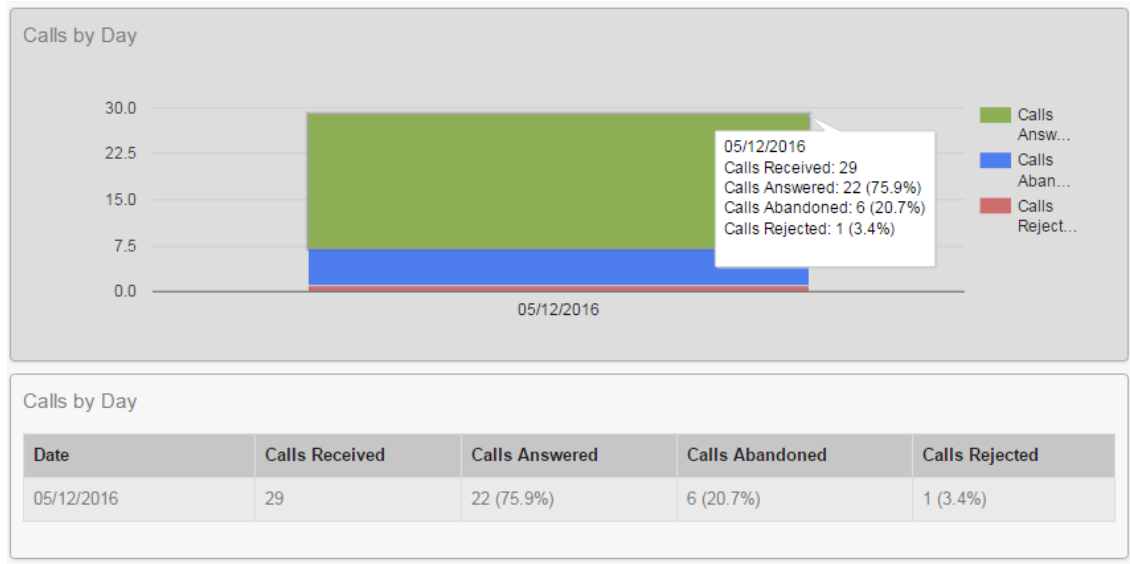
The Calls by Day report shows a summary of the call activity for all queues by day. Only calls that arrive via queues will be included, for example outgoing or direct-dialled calls are not displayed. Any activity outside of the start/end of day and from unselected days of the week is not included in the results. **The end date is in the future: only showing historical data. Calls made within the last 5 minutes may not have been processed and will not appear.** All times are in (GMT-5.00) America/Eastern.

Update Report

3. Select *Report Type* from the drop-down list.
4. Set the report's time period under *Data range*.

- Click **Update Report** at the bottom.

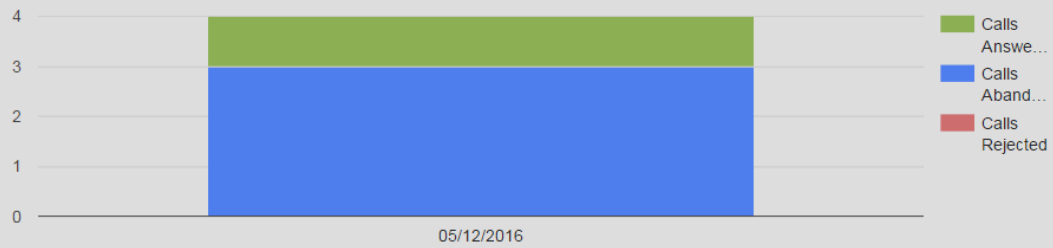
On-demand report appears underneath Reports for business group:



The report provides the requested information in graphic and tabular format, depending on the report criteria you selected. Refer to the report's header for an explanation of its content.

The Calls by Day report shows a summary of the call activity for all queues by day. Only calls that arrive via queues will be included, for example outgoing or direct-dialed calls are not displayed. Any activity outside of the start/end of day and from unselected days of the week is not included in the results. All times are in (GMT-5.00) America/Eastern.

Calls by Day



Calls by Day

Date	Calls Received	Calls Answered	Calls Abandoned	Calls Rejected
05/12/2016	4	1 (25%)	3 (75%)	0 (0%)

The dashboard gives you access to the following data on-demand:

- Abandoned Calls Summary
- Agent Status Summary
- Agent Summary
- Calls by Day
- Calls by Queue
- Call Detail by Agent
- Call Duration Summary
- Call Log
- Daily Traffic
- Frequent Call Summary
- Hourly Usage
- Inbound Summary
- Queue Summary
- Short Calls by Agent
- User Statistics

Refer to these reports for frequently requested information:

- *Agent Summary* - Overview of the performance of all of the agents in the call center, allowing you to spot any issues that may require further investigation.
- *Calls by Day* - Statistics on call activity for the business group or departments managed by an iACD supervisor on each day that falls within a specified time period, enabling you to identify patterns in call volume or identify unexpected rates of call abandonment or rejection.
- *Calls by Queue* - Statistics on call activity for a particular Queue on each day that falls within a specified time period, enabling you to identify patterns in call volume so that you can anticipate busy period in future.
- *Call Detail by Agent* - Detailed view of call activity for a particular agent, including all incoming and outgoing calls involving the agent during the specified time period, enabling you to assess their performance.
- *Call Duration Summary* - Information on the length of calls answered by agents in a particular queue during the specified time period, allowing you to see how agents are dealing with customer calls.
- *Call Log* - Detailed overview of call activity, providing information on all calls made to or from the business group or department during the specified time period, allowing you to analyze how calls are being processed.
- *Daily Traffic* - Information on the volume of incoming calls to the business group or department during the specified time period, enabling you to identify the peak hours of activity.
- *Hourly Usage* - Information on the volume of calls handled per hour by a particular queue during the specified time period, enabling you to see when the queue is at its busiest.
- *User Statistics* - Overview of the performance of each of the agents in the call center, enabling you to view key metrics such as how many calls agents are failing to answer and how long on average they are taking to deal with customer calls.
- *Agent Status Summary* - Summarizes how long an agent spends in each agent state during the specified time period, enabling you to monitor each agent's performance. Available only with the Integrated ACD Premium service.

Monitor, Whisper, and Barge-In

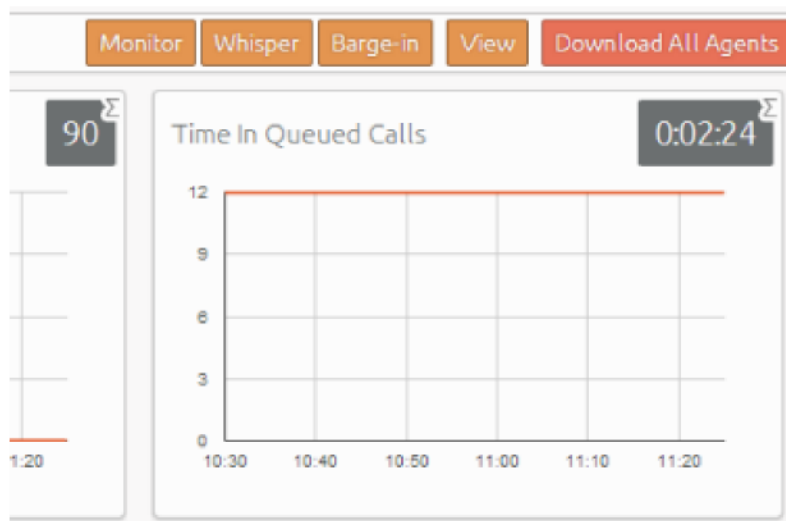
Supervisors can participate in phone center calls via these features:

- *Monitor* – listen in to a call between selected agent and customer.
- *Whisper* – speak to or advise selected agent during a call, without customer hearing.
- *Barge-In* – fully join a call, speaking to selected agent, and to customer.

To use these capabilities:

1. Click **AGENTS** in the left menu, then select the desired agent in a call.

The panel below opens:



2. Click **Monitor**, **Whisper**, or **Barge-in** in the top menu.

Your phone rings, to connect you to the agent's call when you answer.

3. To change your level of participation during the call, click **Monitor**, **Whisper**, or **Barge-in** as needed.

Note: Whisper results in a brief loss of audio that affects the customer. To minimize impact on customer's call, click **Whisper** only during a break in conversation between agent and customer.

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855-600-4NHC (4642)

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