

# Welcome to Interactive Intelligence 3.0 Interaction Supervisor

## User Training

# Getting Started:



## Checklist:

- √ Interaction Supervisor has been loaded to your computer.
- √ You have received a copy of this presentation to follow along.
- √ Verified date and time for training

THIS PRESENTATION IS NOT INTENDED TO REPLACE THE ONSITE TRAINING PURCHASED AND PROVIDED BY Interactive Intelligence, Inc.



# Training Agenda

- Introduction to Interaction Supervisor
- Log into Supervisor
- Supervisor Overview
  - Views
  - Workspace
  - Plug-ins, License, Access rights
  - Installation
  - Accessing Help
- Assist Agents with interactions
- Views
  - Agent Detail
  - Workgroup
  - Managing views
- Graphs
  - Overview
  - Types and modifying
- Reports
  - Access and how to run
- Alerts

# Interaction Supervisor Introduction



- **Interaction Supervisor is a tool for monitoring Interaction Center agents, workgroups, queues, lines, and stations.**
- **It is the IC's real-time performance monitoring system.**
- **This client-side application displays workgroup and queue statistics, and sends notifications when statistics reach predetermined performance levels.**
- **Contact Center Supervisors use Interaction Supervisor to view graphs and tables that consolidate statistics from multiple workgroups.**



# Interaction Supervisor Introduction

- Although the Interaction Client provides limited user, workgroup and queue monitoring capabilities, Interaction Supervisor is more powerful and summarizes additional operational statistics.
- It allows a user to:
  - Monitor single workgroups
  - Monitor multiple workgroups
  - Monitor individual agents
  - Set alerts to inform of events triggered by statistical changes
  - View real-time statistics in graphs and consolidated tables

# Interaction Supervisor Overview



## What is a View?

A view is a window that displays data. Information can be displayed in columns, or rendered as a graph. Views can be positioned anywhere on the screen, or docked within Supervisor's workspace.

The screenshot shows the 'Interaction Supervisor' application window. The main window title is 'Interaction Supervisor (abbott) - [SteveUser]'. The interface includes a menu bar (File, Edit, View, Agent, Window, Help), a toolbar, and a data table. The table has columns for 'Current Period', 'Previous Period', 'Current Shift', and 'Previous Shift'. A context menu is open over the table, showing options like 'Edit Alerts...', 'Add Multiple Alerts...', 'Add/Remove Statistics...', and 'Change Agent/Workgroup...'. Two callouts on the right side of the image identify 'Pull-Down Menu Commands' (pointing to the top menu bar) and 'Context Menu Commands' (pointing to the open context menu).

	Current Period	Previous Period	Current Shift	Previous Shift
Interactions Entered:	0	0	29	29
Interactions Answered	0	0	23	23
Interactions Completed	0	0	22	22
Average Wait Time	N/A	N/A	0:0	0:0
Average Talk Time	N/A	N/A	0:0	0:0
Longest Talk Time	0:00:00	0:00:00	0:0	0:0
Longest Interaction Waiting	0:00:00	0:00:00	0:0	0:0
NonACD Interactions	0	0	0	0

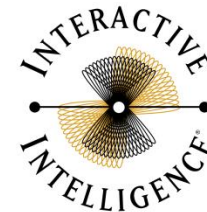
**Pull-Down Menu Commands**

- Agent
- Edit Alerts...
- Add Multiple Alerts...
- Add/Remove Statistics...
- Change Agent/Workgroup...

**Context Menu Commands**

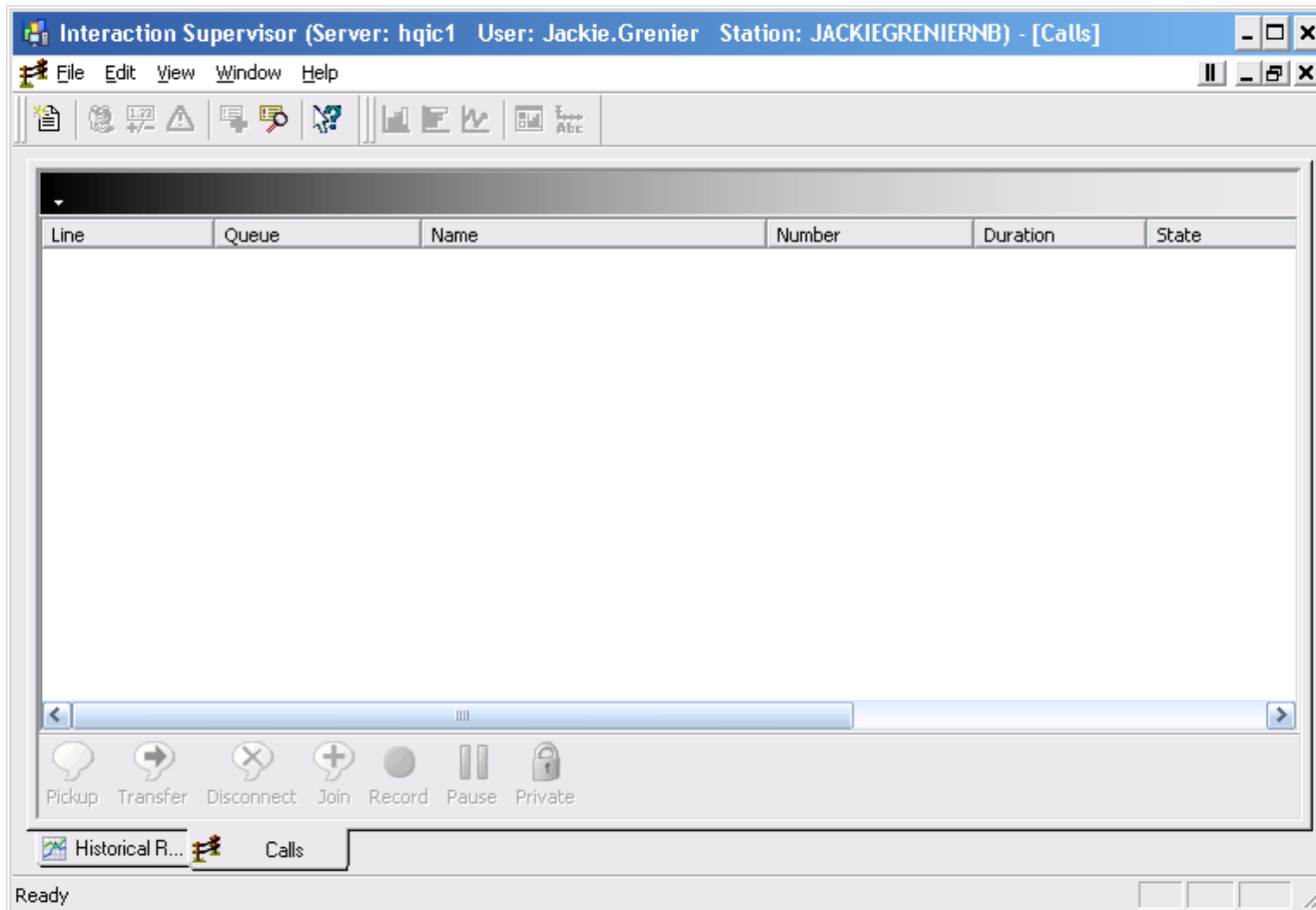
- Edit Alerts...
- Add Multiple Alerts...
- Add/Remove Statistics...
- Change Agent/Workgroup...
- Remove Column
- Remove Row

# Interaction Supervisor Overview



## Workspace

When views are docked or displayed as tab pages, they appear within Supervisor's main window, which is called the workspace.



# Interaction Supervisor Overview cont'd



## Plug ins

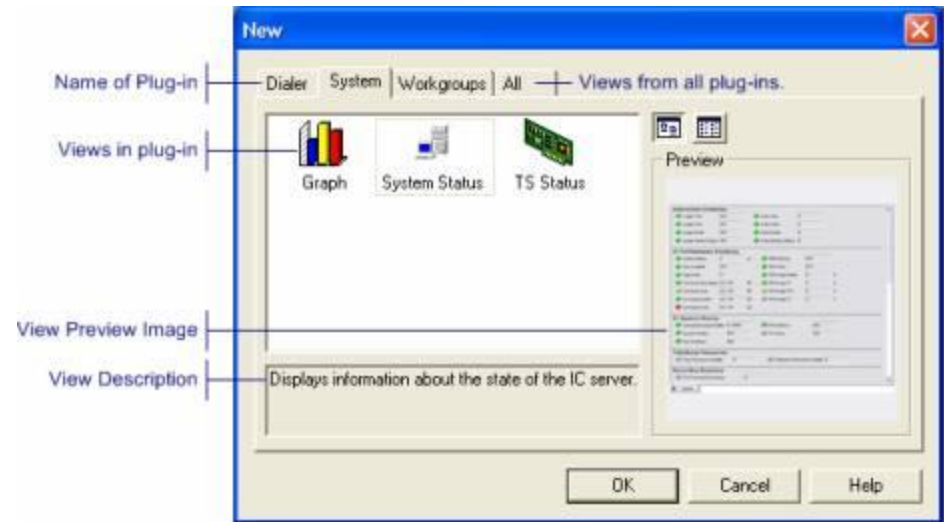
Views are added to Supervisor by plug-in modules (DLLs) that extend its monitoring capability in some way.

For example, the plug-in for Interaction Dialer (SupDialerA.dll) enhances Supervisor to display information about outbound campaigns and workflows.

Plug in details/access rights for user are found under drop down Help Menu and select Plug In Info option.

To view and use plug ins – access rights must be assigned to your station.

Plug-ins also customize toolbars and menu options.



# Interaction Supervisor Overview cont'd



- **Automatic software updates**

- **once installed, new and updated plug-ins are automatically installed on client PCs by the IC's Auto-Updater subsystem.**
- **Auto-Updater applies automatic updates to client PCs to add functionality and to apply hot fixes. As a result, Interaction Supervisor is self-updating once it is installed.**

- **Supports a switchover environment**

- **Supervisor watches for Switchover notifications.**
- **It will automatically restart and connect to a backup server if the primary IC server fails. There is no need to manually restart Interaction Supervisor after a switchover.**
- **Alerts switchover too, since the Alert server replicates all alerts to the backup server. After a switchover, Users will continue to receive visual, audio and email Alerts.**

# Interaction Supervisor Overview cont'd



- **Licensing**

- is enforced on a per workstation basis

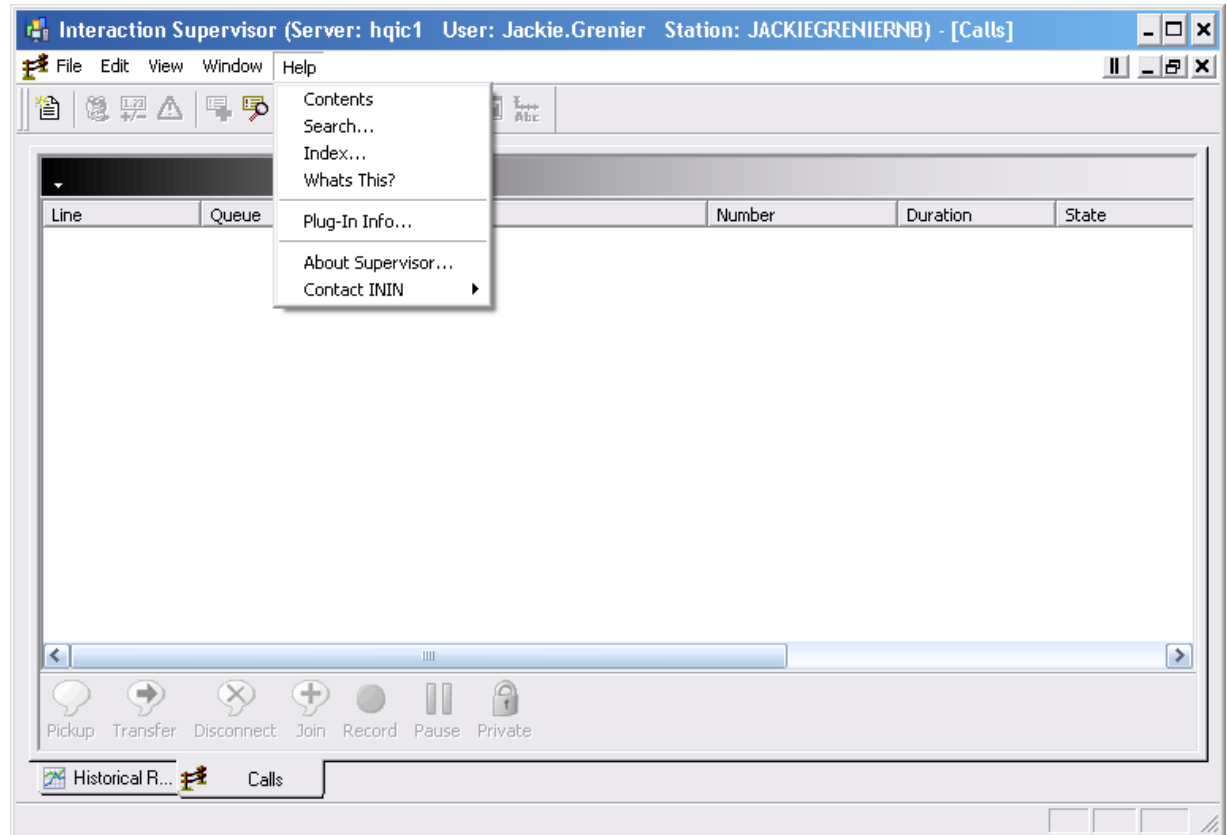
- **Recommended Access Rights**

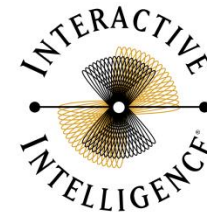
- **Right to view workgroups and workgroup queues**
- **Allow Alerts to send emails or trigger handler**
- **Allow Supervisor Message Creation**

# Interaction Supervisor Overview cont'd



- **Accessing Help**
- **Help drop down menu**
- **Contents**
- **Search**
- **Index**
- **What's this?**
- **Plug in info**
- **About Supervisor**
- **Contact ININ**





# Interaction Supervisor Views

## Agent Detail

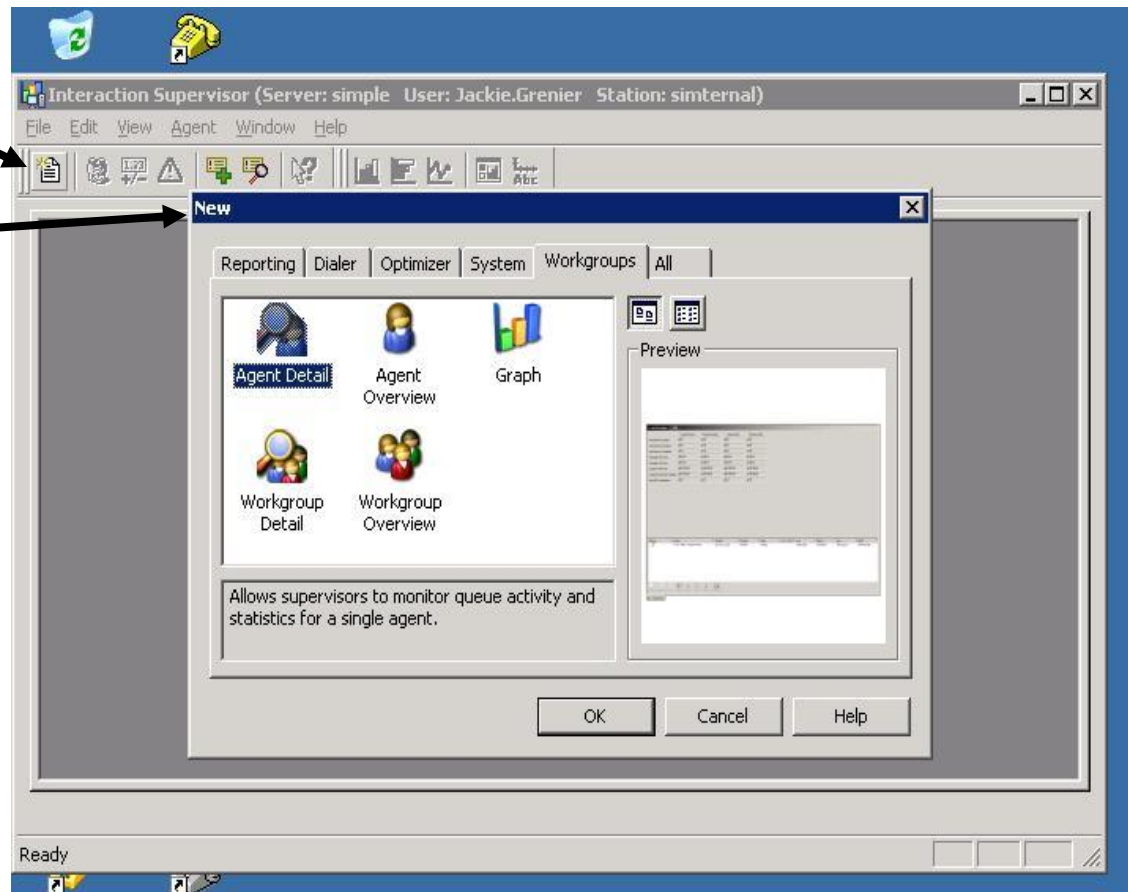
**Select New**

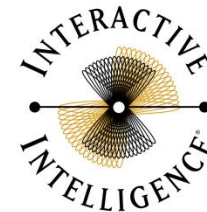
**New Dialog Box appears**

**Note – you can see your plug ins/access here too.**

**Select type – for demonstration purposes selected Agent Detail**

**Press OK.**





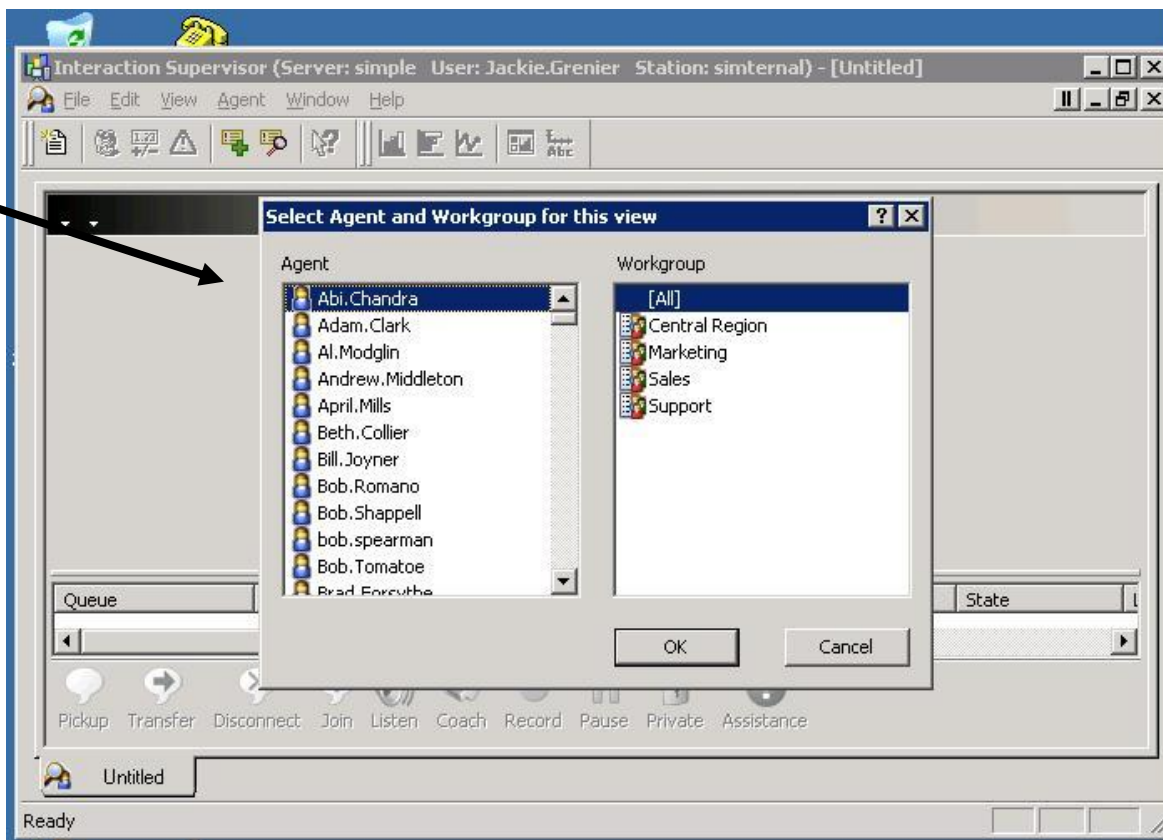
# Interaction Supervisor Views

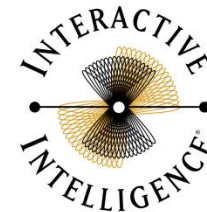
## Agent Detail – Cont'd

Select Agent and Workgroup dialog appears

Select the agent or workgroup you would like to view.

Press OK.





# Interaction Supervisor Views

## Agent Detail – Cont'd

**Agent Detail View**

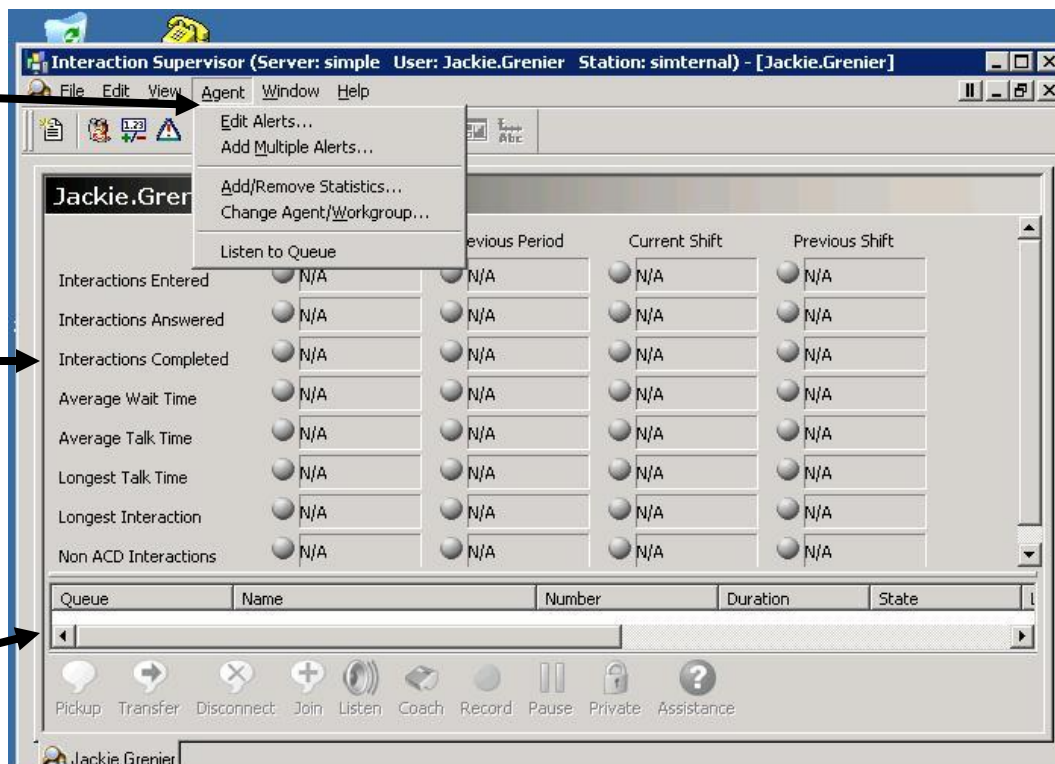
**Agent Drop Down Menu**

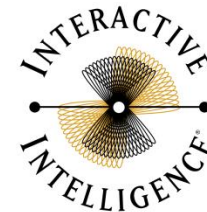
- Available if you right click in workspace

**Statistic**

With ? Help cursor – select a statistic for definition

Bottom of view is the Queue/Interaction Presence workspace





# Interaction Supervisor Views

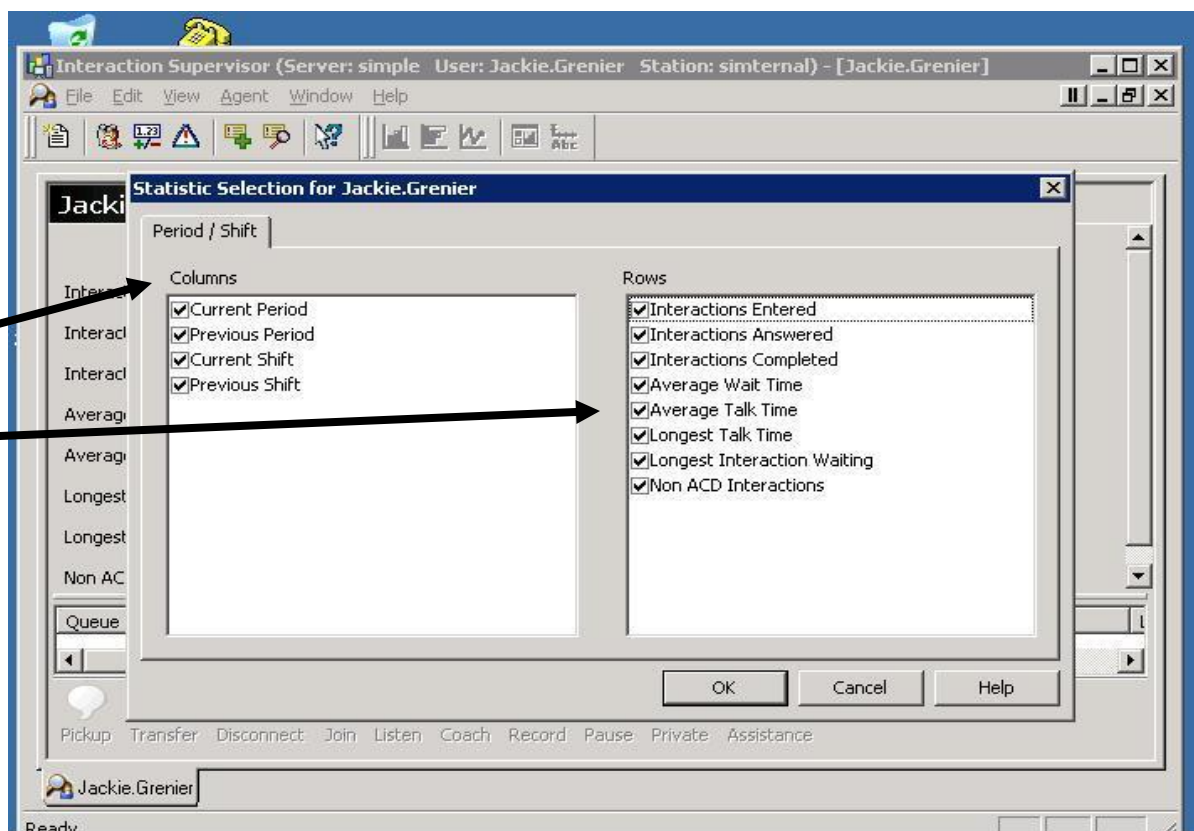
## Agent View Cont'd

### Add Remove Statistic

Statistic Selection Box is accessible from Agent drop down menu or right click

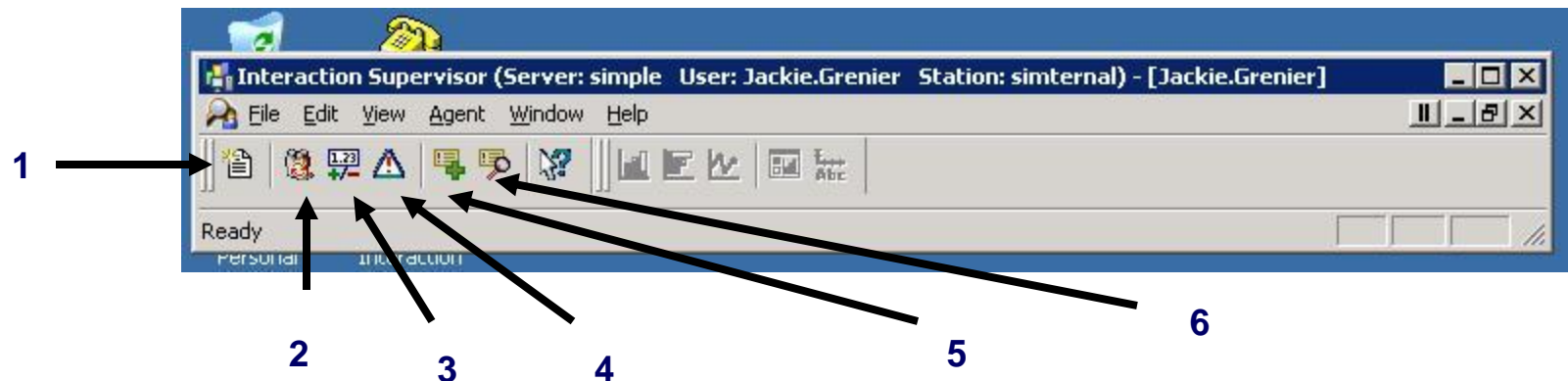
In this dialogue you can:

- Add or remove columns
- Add or remove specific rows (statistics)

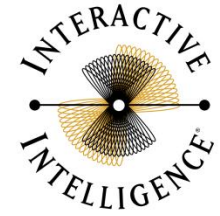


# Interaction Supervisor Views

## Agent Detail Task Bar



- 1) New View – opens a dialog to select a new view.
- 2) Opens a dialog to select a new agent and workgroup to monitor.
- 3) Displays a dialog for modifying statistics in this view (Add/Remove)
- 4) Displays a dialog to modify Alert Levels
- 5) Opens dialog to create and send Supervisor messages
- 6) Opens Dialog to open, edit remove Supervisor Messages
- 7) Opens Help Topic



# Interaction Supervisor Views

## Agent Overview View

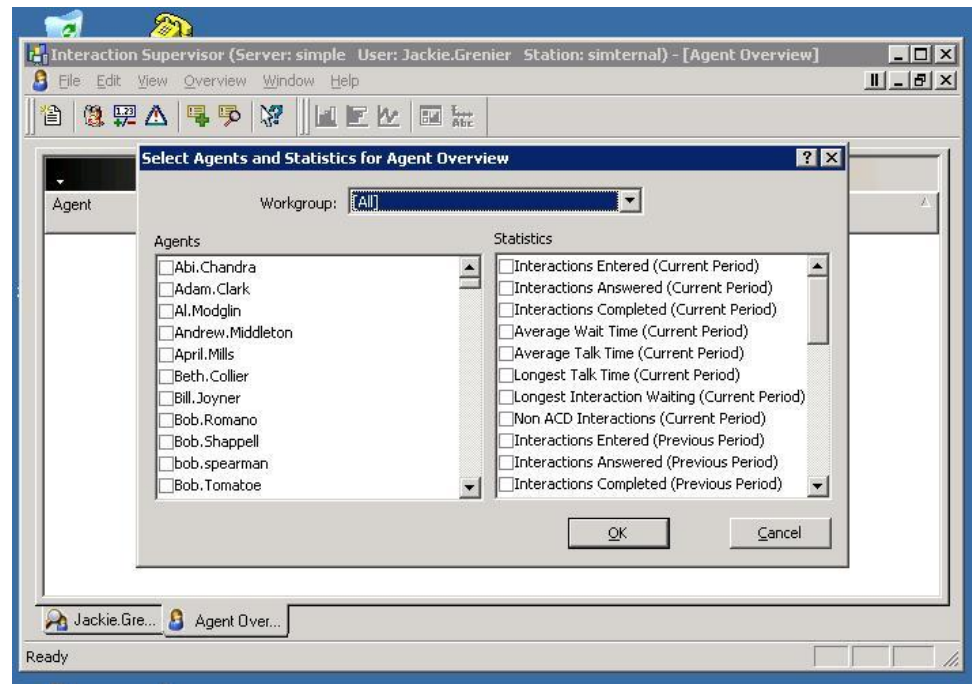
**Select New View**

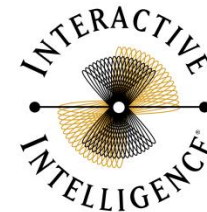
**Select Workgroup Tab,  
Agent Overview Icon.**

**Dialog appears to Select  
Agents and Statistics for  
Agent Overview**

**The Agent Overview view  
consolidates agent  
statistics in an expandable  
table control, so that an  
agent's performance can be  
compared to other agents in  
various workgroups.**

**Select a couple of agents  
and statistics you'd like to  
compare.**





# Interaction Supervisor Views

## Agent Overview View – cont'd

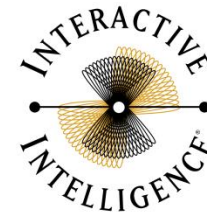
After you have selected a couple of agents – your view will have agents listed with collapsible work group names.

The statistics you have selected are on the right.

You can manage alerts, statistics (add/remove), and you can add/remove agents. Right Click on Workgroup or Statistic for menu.

The screenshot shows the "Interaction Supervisor (Server: simple User: Jackie.Grenier Station: simternal) - [Agent Overview]" window. The window has a menu bar (File, Edit, View, Overview, Window, Help) and a toolbar with various icons. The main area displays a tree view of agents and their statistics. The "Agent" column is on the left, and the "Interactions Entered (Current...)" and "Interactions Answered (Current...)" columns are on the right. The "Accounting" workgroup under "Jaclyn.Spillane" is selected.

Agent	Interactions Entered (Current...)	Interactions Answered (Current...)
Jackie.Grenier	N/A	N/A
Accounting	N/A	N/A
MSCRM	N/A	N/A
Marketing	N/A	N/A
Sales	N/A	N/A
Jaclyn.Spillane	0	0
Accounting	0	0
Dialer	0	0
EasyScripter Admins	0	0
EasyScripter Users	0	0
MSCRM	0	0
Marketing	0	0
Sales	0	0
Support	0	0



# Interaction Supervisor Views

## WorkGroup Detail

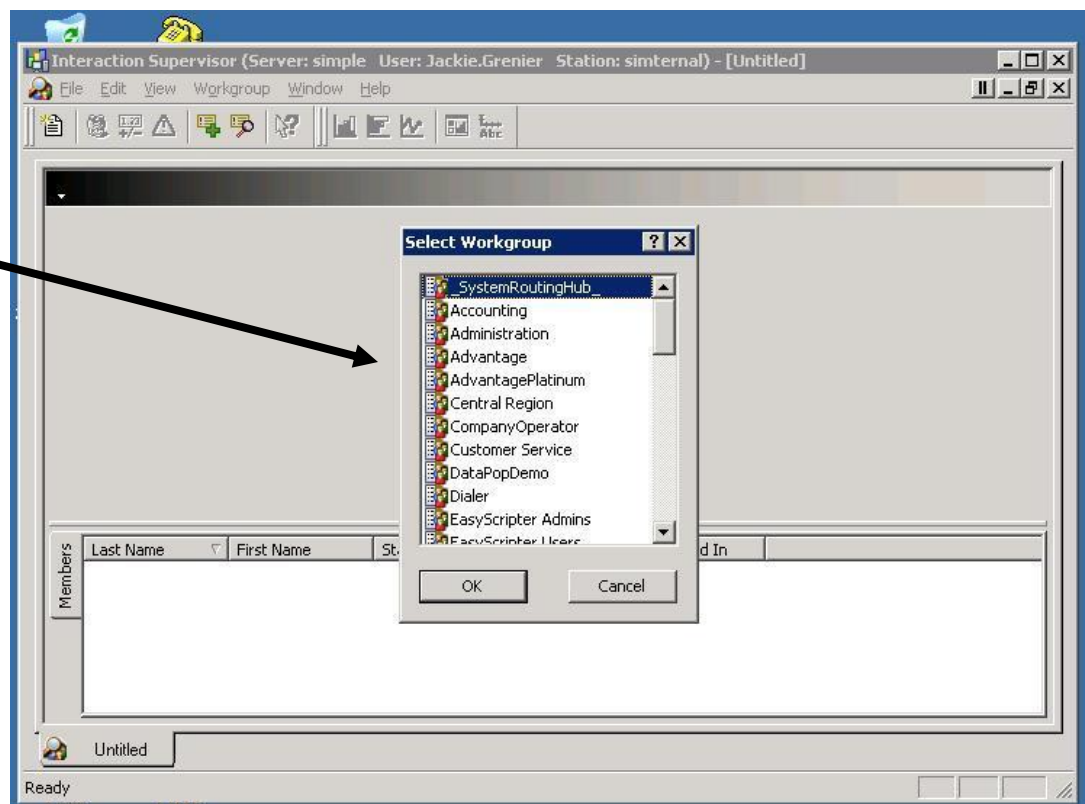
**Select New View**

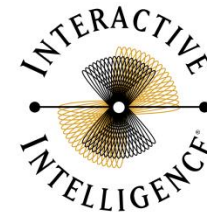
**Select Workgroup Tab,  
WorkGroup Detail**

**Dialog appears to Select  
WorkGroup.**

**This view displays the  
status of individual  
workgroup members.**

**It displays a customizable  
list of statistical information  
for the workgroup and for  
the logged in members of  
the workgroup.**





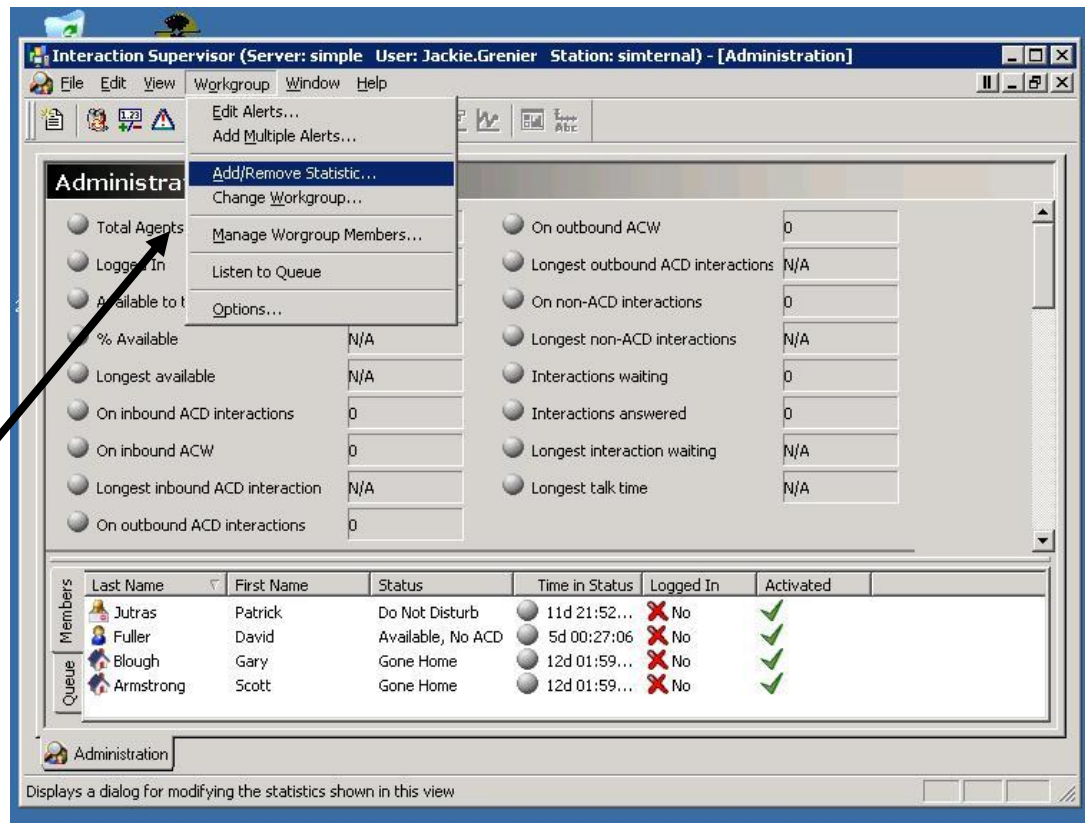
# Interaction Supervisor Views

## WorkGroup Detail Cont'd

The WorkGroup detail view displays workgroup and queue statistics.

Use it to monitor a single workgroup and to display each workgroup member's availability status, time in status, logged in state, and other information.

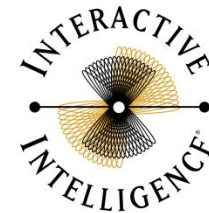
Notice the Workgroup drop down menu. Similar to Agent views but there is ability to Manage users. Alerts are covered later in this training for both agent and workgroup.



The screenshot shows the Interaction Supervisor software interface. The title bar reads "Interaction Supervisor (Server: simple User: Jackie.Grenier Station: simternal) - [Administration]". The menu bar includes "File", "Edit", "View", "Workgroup", "Window", and "Help". A "Workgroup" dropdown menu is open, showing options: "Edit Alerts...", "Add Multiple Alerts...", "Add/Remove Statistic...", "Change Workgroup...", "Manage Workgroup Members...", "Listen to Queue", and "Options...". The main area displays various statistics for the selected workgroup, such as "On outbound ACW", "Longest outbound ACD interactions", "On non-ACD interactions", "Longest non-ACD interactions", "Interactions waiting", "Interactions answered", "Longest interaction waiting", and "Longest talk time". Below the statistics is a table with columns: "Members", "Last Name", "First Name", "Status", "Time in Status", "Logged In", and "Activated".

Members	Last Name	First Name	Status	Time in Status	Logged In	Activated
	Jutras	Patrick	Do Not Disturb	11d 21:52...	No	
	Fuller	David	Available, No ACD	5d 00:27:06	No	✓
Queue	Blough	Gary	Gone Home	12d 01:59...	No	✓
	Armstrong	Scott	Gone Home	12d 01:59...	No	✓

At the bottom of the window, there is a status bar that says "Administration" and a small dialog box that reads "Displays a dialog for modifying the statistics shown in this view".



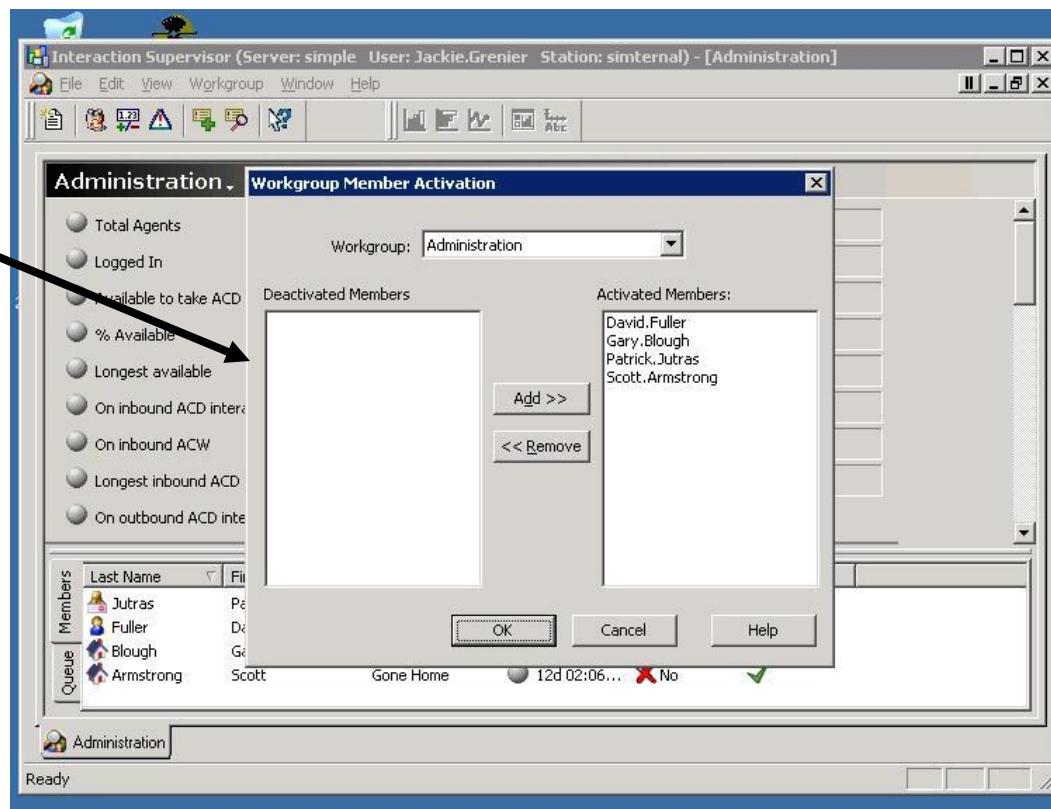
# Interaction Supervisor Views

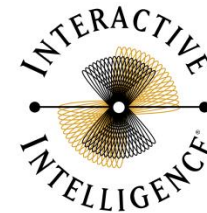
## WorkGroup Detail Cont'd

**When you select Manage Workgroup Members – the Workgroup Member Activation dialog is presented.**

**You can select members and make them active or deactivate them for the particular workgroup selected.**

**Notice, like Agent View – you also have the ability to change the Workgroup via the dropdown menu or tool bar.**





# Interaction Supervisor Views

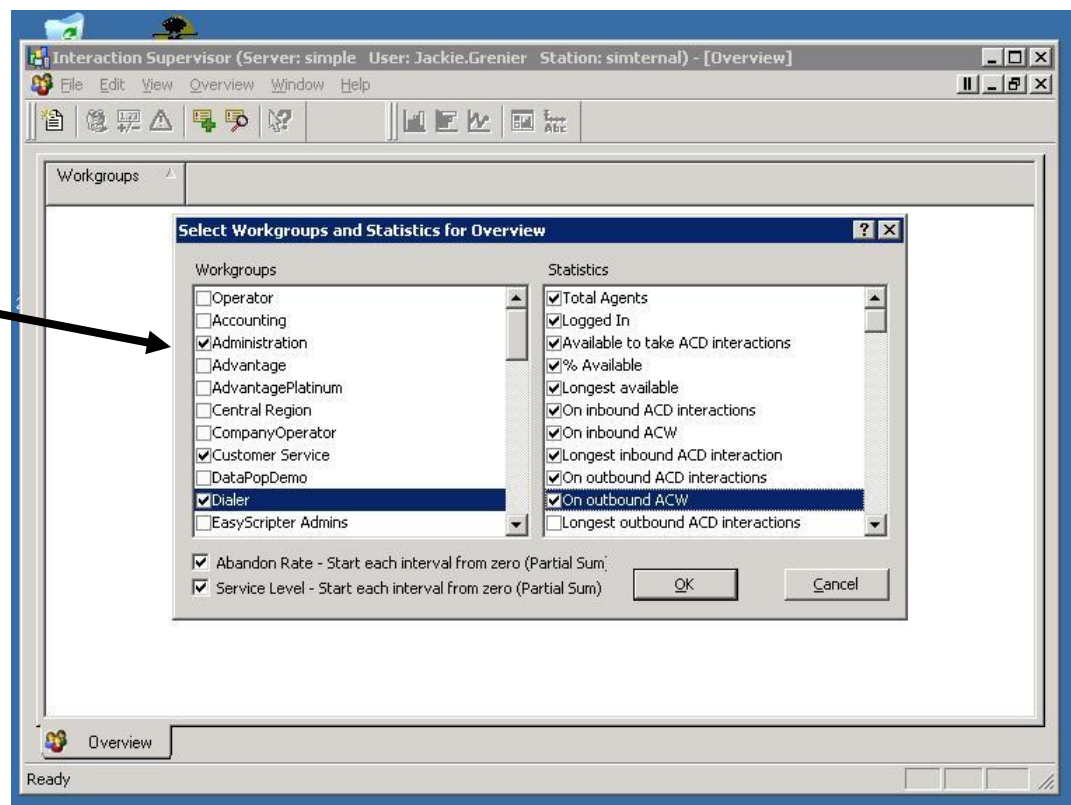
## WorkGroup Overview

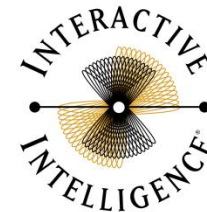
**Select New View**

**Select WorkGroup Overview.**

**Dialog appears to Select WorkGroup and Statistics. You can select which workgroup and statistics you would like to see in this view.**

**This view summarizes activity of multiple workgroups and allows the user to select workgroups and statistics to monitor.**





# Interaction Supervisor Views

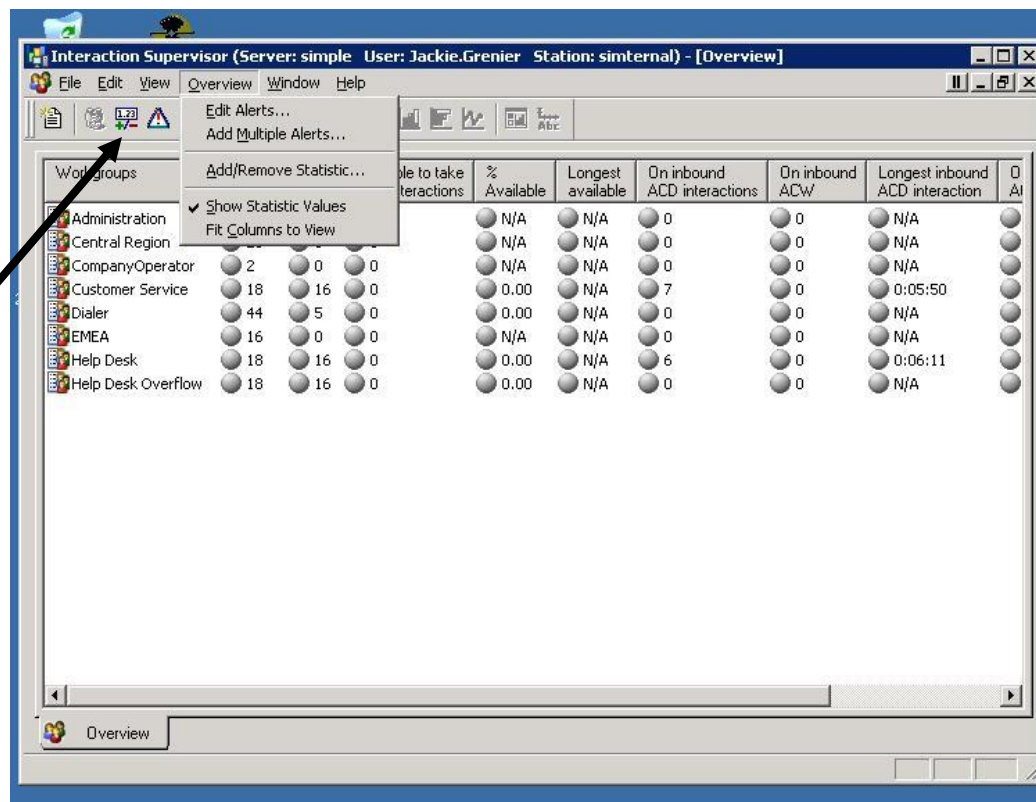
## WorkGroup Overview Cont'd

In this view notice how the Workgroups selected appear stacked on the right hand side. The statistics you selected are on the right.

If you right click a workgroup you will have functionality focused at that Workgroup.

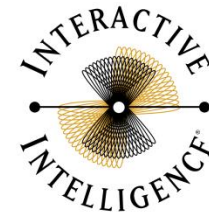
Notice – there is a Overview Drop down menu as well.

You have the ability to add/remove statistics and workgroups as needed.



The screenshot shows the 'Interaction Supervisor (Server: simple User: Jackie.Grenier Station: simternal) - [Overview]' window. The 'Overview' menu is open, showing options like 'Edit Alerts...', 'Add Multiple Alerts...', 'Add/Remove Statistic...', 'Show Statistic Values', and 'Fit Columns to View'. The 'Workgroups' list on the left includes Administration, Central Region, Company Operator, Customer Service, Dialer, EMEA, Help Desk, and Help Desk Overflow. The main table displays statistics for these workgroups.

Workgroup	Available to take interactions	% Available	Longest available	On inbound ACD interactions	On inbound ACW	Longest inbound ACD interaction	AI
Administration	●	N/A	●	0	●	N/A	●
Central Region	●	N/A	●	0	●	N/A	●
Company Operator	● 2	● 0	● 0	● 0	● 0	● N/A	●
Customer Service	● 18	● 16	● 0	● 7	● 0	● 0:05:50	●
Dialer	● 44	● 5	● 0	● 0	● 0	● N/A	●
EMEA	● 16	● 0	● 0	● 0	● 0	● N/A	●
Help Desk	● 18	● 16	● 0	● 6	● 0	● 0:06:11	●
Help Desk Overflow	● 18	● 16	● 0	● 0	● 0	● N/A	●



# Interaction Supervisor Views

## Graph View

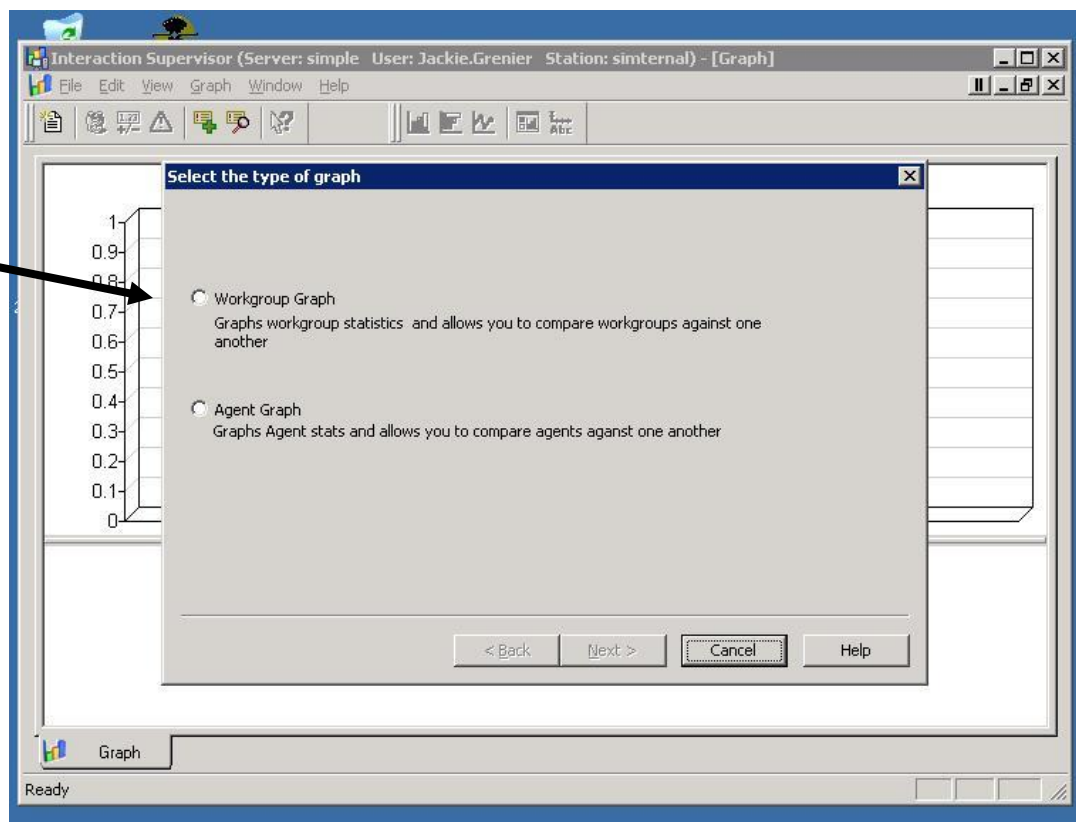
**Select New View**

**Select Graph View**

**Dialog appears to Select the type of Graph. We will take a look at both Workgroup and Agent graph.**

**Interaction Supervisor supports views that graph statistics in real-time. Graphical views are updated automatically when the value of a statistic changes.**

**Once a graph view is added to the workspace, statistics are rendered as bar graphs or line charts.**



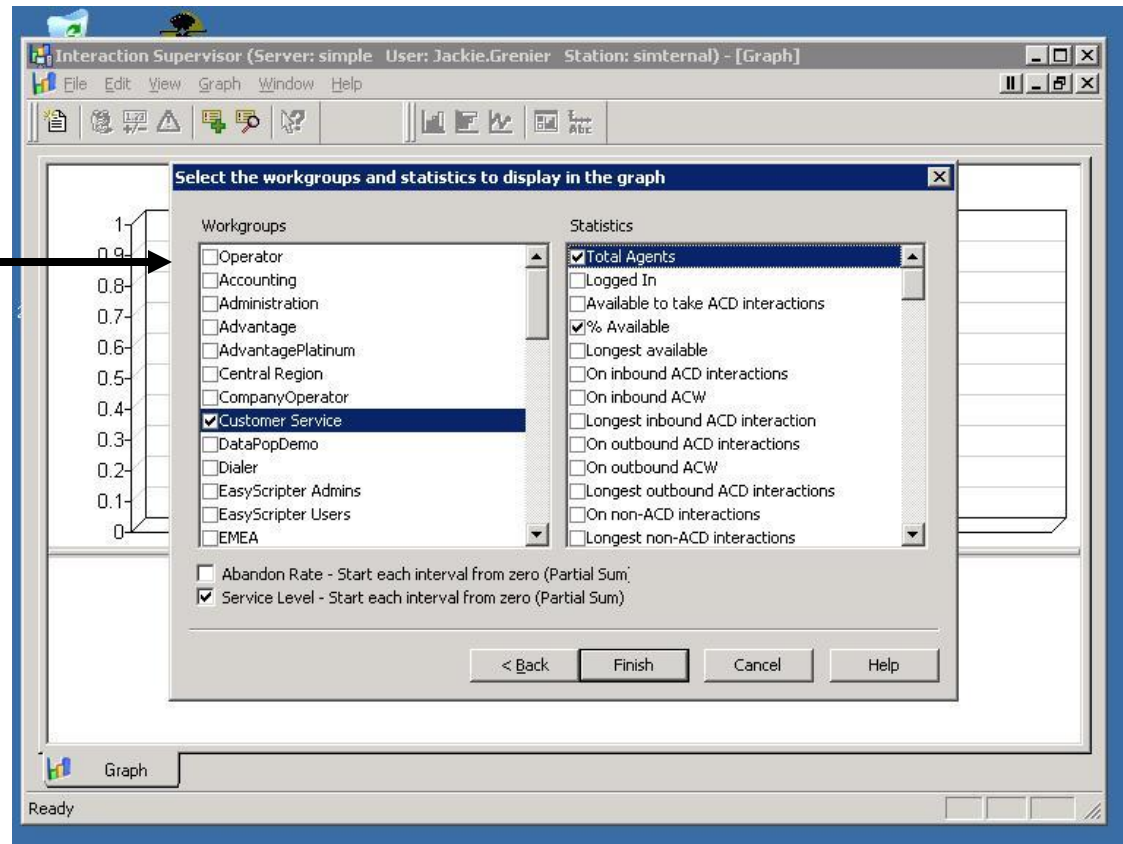
# Interaction Supervisor Views

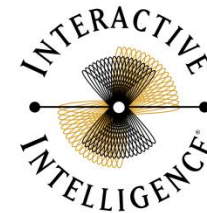
## Graph View Cont'd



After selecting the type of graph, in this case Workgroup, the next dialog is to select the workgroup and statistics you'd like to display.

In this case we are selecting Customer Service workgroup with Total Agents and % Available Statistics.





# Interaction Supervisor Views

## Graph View Cont'd

Notice how the Graph drop down menu appears.

You have the following options:

**Add/Remove Statistics**

**Configure Graph**

**Graph Type**

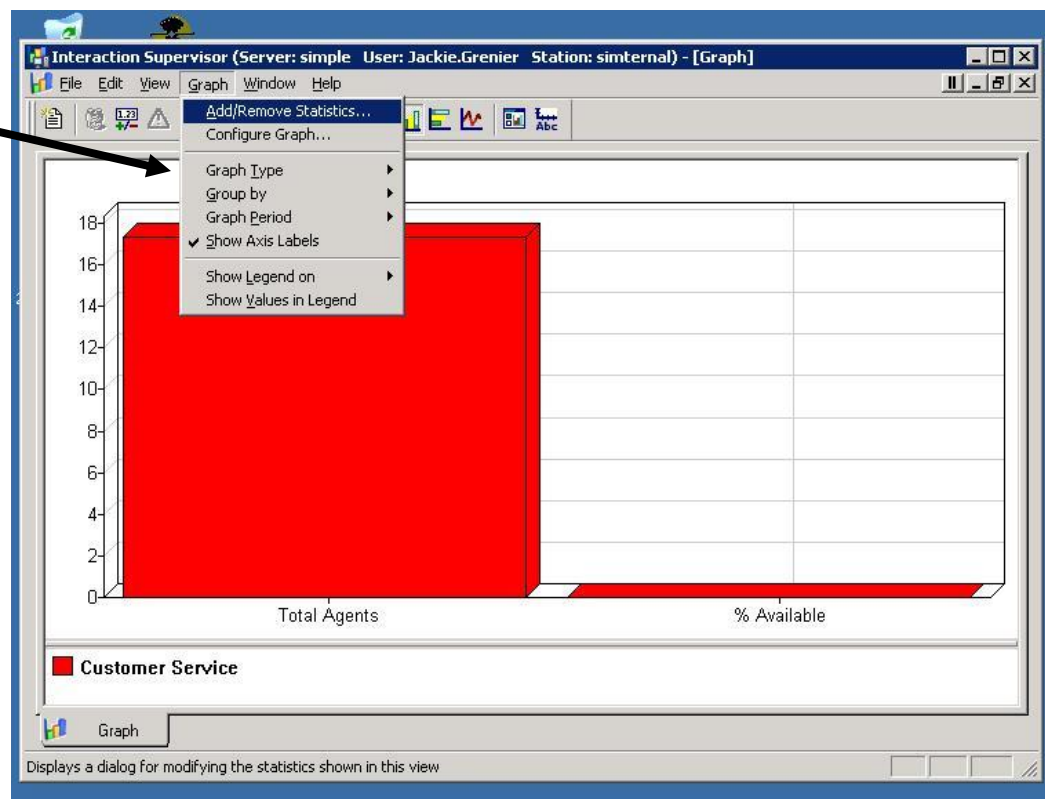
**Group By**

**Graph Period**

**Show Axis Labels**

**Show Legend On**

**Show Values in Legend**



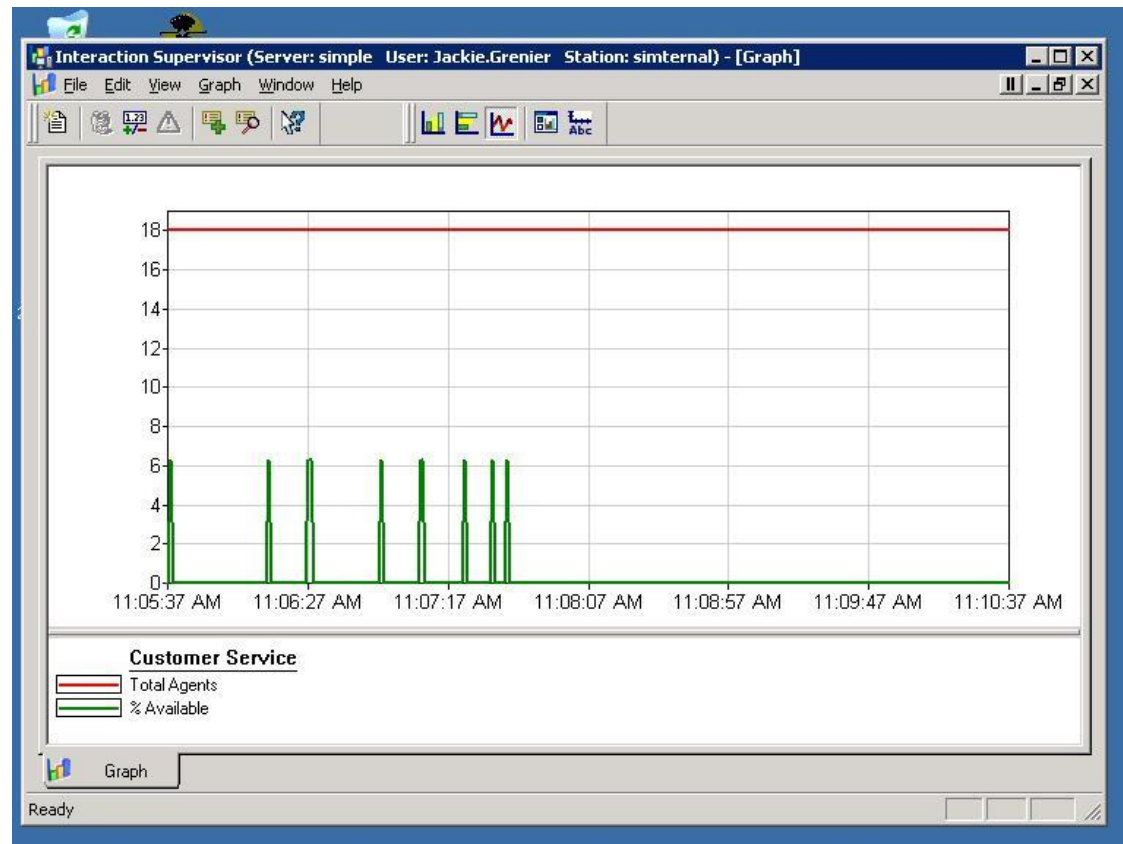
# Interaction Supervisor Views

## Graph View Cont'd



This is the same graph but a line type has been selected under Graph Type.

By using the Graph drop down you have access to format the display of the graph as needed.



# Interaction Supervisor Views Reports

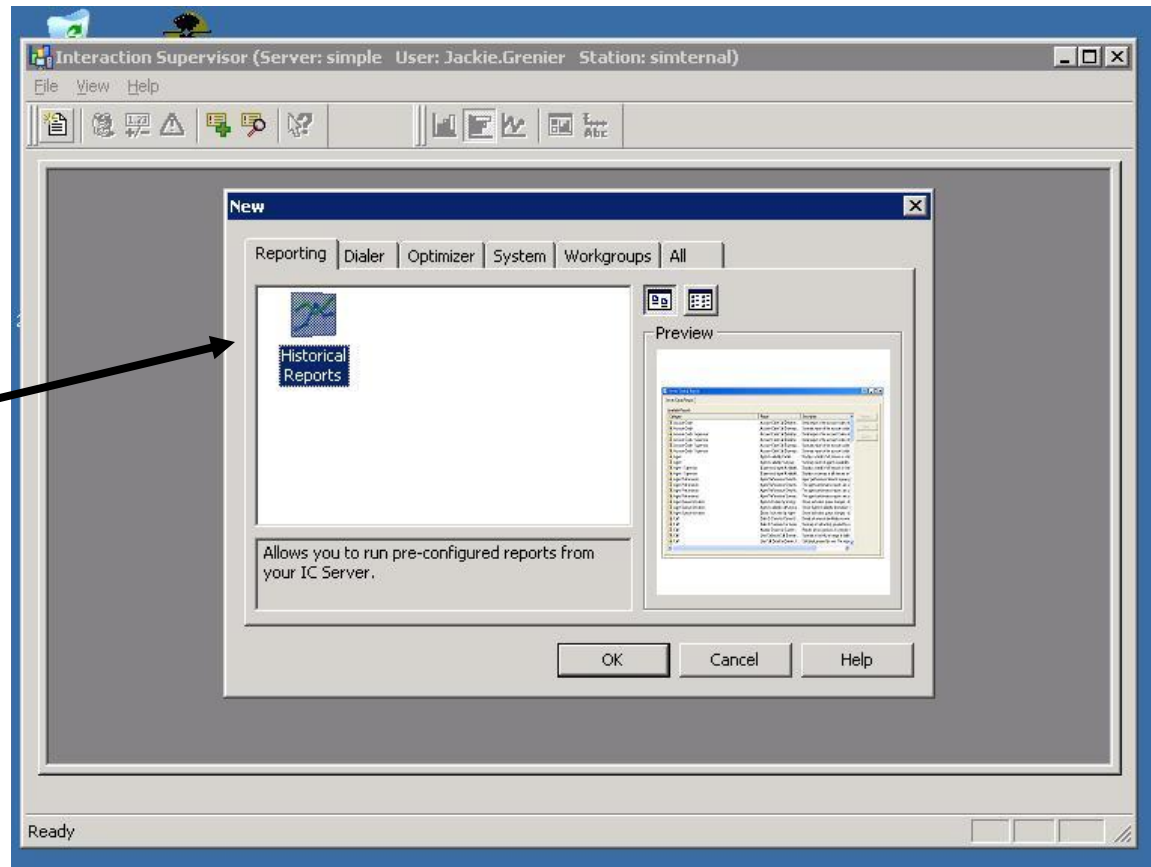


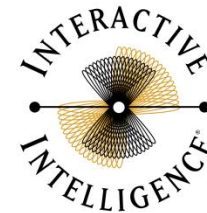
Historical reports are available in Interaction Supervisor 2.4

It requires a valid reporting license.

To access reports Select New and the Reports Tab.

Select the Historical Reports Icon.





# Interaction Supervisor Views

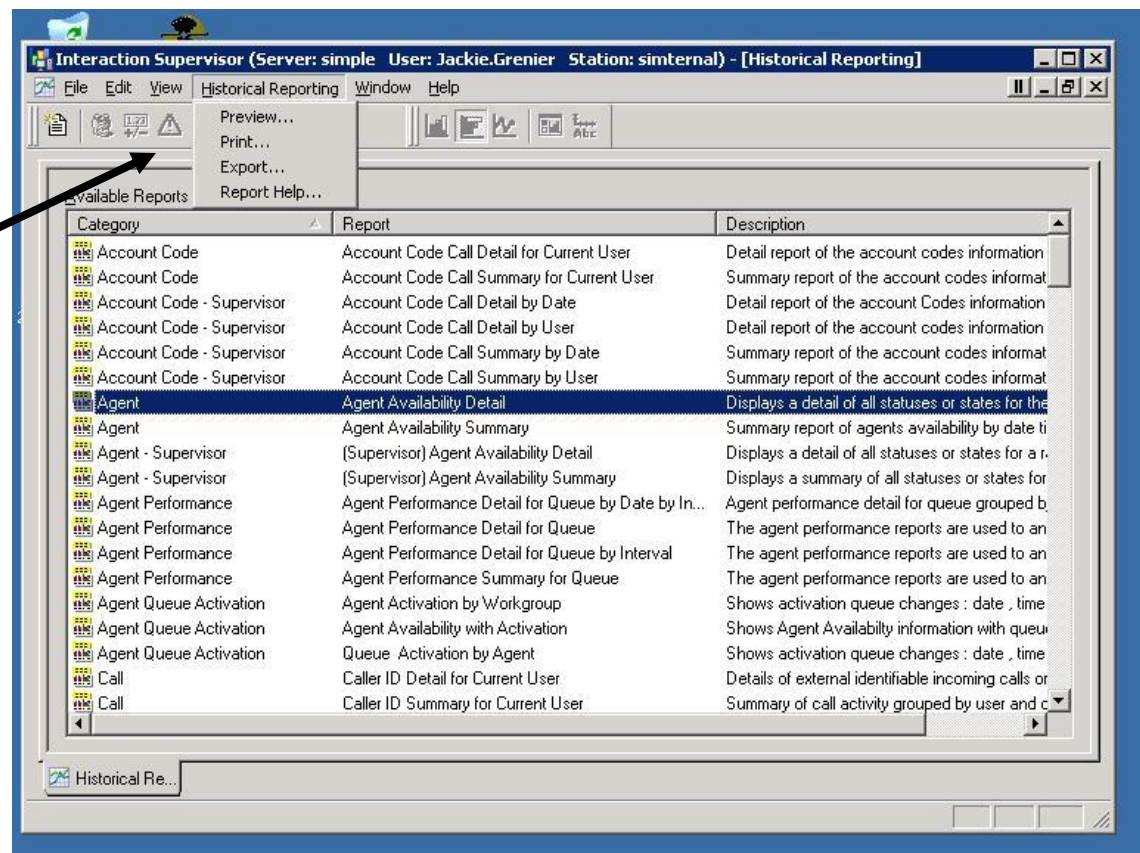
## Reports Cont'd

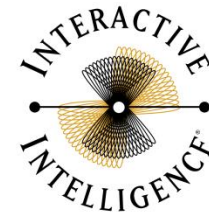
Select a report by clicking on a row in the list.

Note the Historical Reporting dropdown menu.

Pull down the Historical Reporting menu and select Preview, Print, or Export, depending upon whether you wish to view, print, or export report data to a disk file, exchange folder, etc.

In this example – select view.





# Interaction Supervisor Views

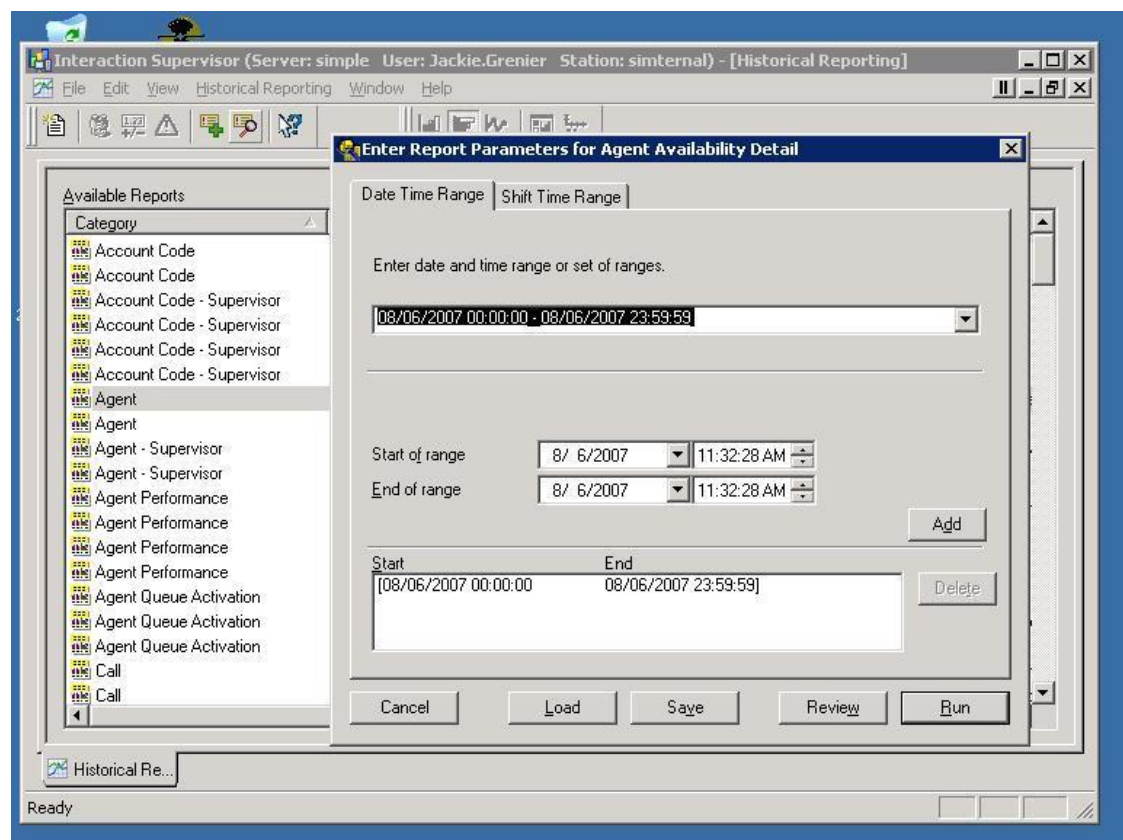
## Reports Cont'd

A dialog box for setting the reports parameters is next.

In this box – you can review your parameters such as date, time of range.

You can review and then run.

Once select run- in this case – the view will populate your screen.



# Interaction Supervisor

## Alerts – How to Add

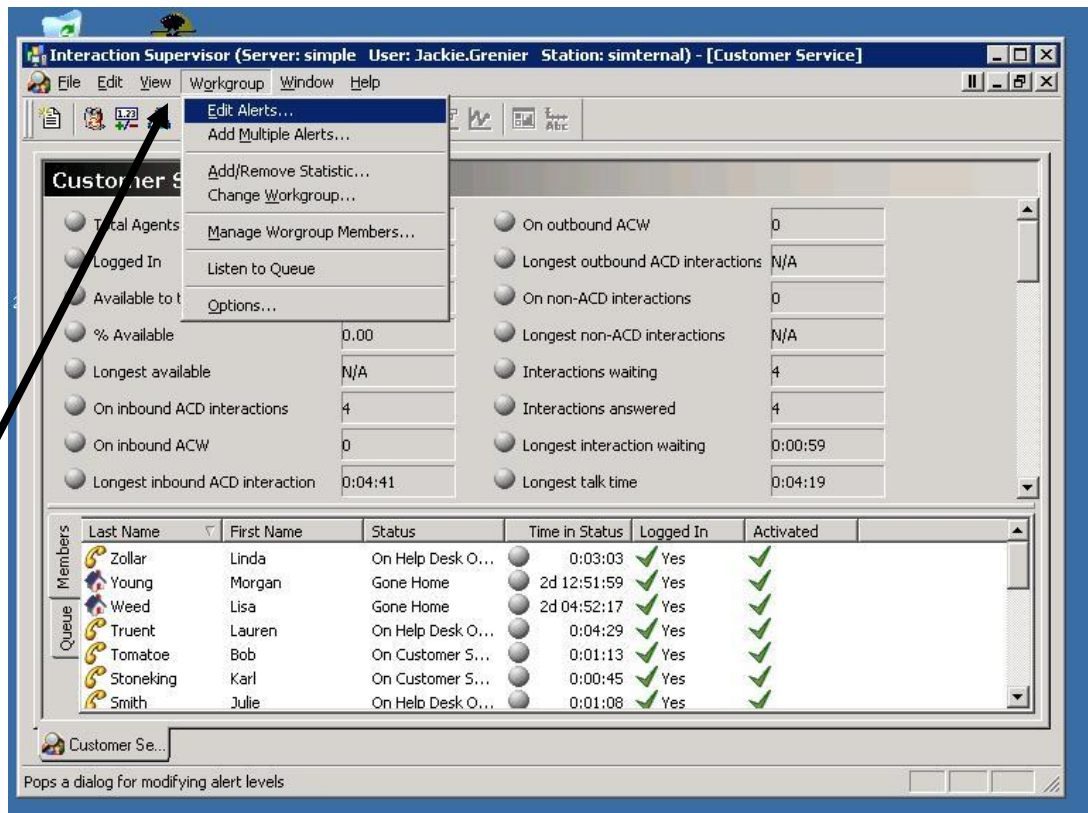
An alert notifies when a statistic is in or out of a user-defined range, based on the value of a statistic or condition on the IC Server.

When an alert becomes active, it can play a sound, change the color of text or an icon, send an Email, or initiate a handler.

Select New and then Select Workgroup Tab.

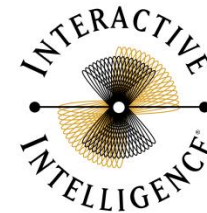
Select Workgroup Detail icon. Selected Customer Services as Workgroup for demonstration.

Select Workgroup menu. Select Edit Alert.



The screenshot shows the Interaction Supervisor application window. The title bar reads "Interaction Supervisor (Server: simple User: Jackie.Grenier Station: simternal) - [Customer Service]". The menu bar includes File, Edit, View, Workgroup, Window, and Help. The "Workgroup" menu is open, showing options: Edit Alerts..., Add Multiple Alerts..., Add/Remove Statistic..., Change Workgroup..., Manage Workgroup Members..., Listen to Queue, and Options... The "Edit Alerts..." option is highlighted. Below the menu, there are several statistics with radio buttons and input fields, such as "On outbound ACW" (0), "Longest outbound ACD interactions" (N/A), "On non-ACD interactions" (0), "Longest non-ACD interactions" (N/A), "Interactions waiting" (4), "Interactions answered" (4), "Longest interaction waiting" (0:00:59), and "Longest talk time" (0:04:19). At the bottom, there is a table with columns: Last Name, First Name, Status, Time in Status, Logged In, and Activated. The table lists several agents and their current status.

Members	Last Name	First Name	Status	Time in Status	Logged In	Activated
	Zollar	Linda	On Help Desk O...	0:03:03	Yes	✓
	Young	Morgan	Gone Home	2d 12:51:59	Yes	✓
	Weed	Lisa	Gone Home	2d 04:52:17	Yes	✓
Queue	Truent	Lauren	On Help Desk O...	0:04:29	Yes	✓
	Tomatoe	Bob	On Customer S...	0:01:13	Yes	✓
	Stoneking	Karl	On Customer S...	0:00:45	Yes	✓
	Smith	Julie	On Help Desk O...	0:01:08	Yes	✓



# Interaction Supervisor

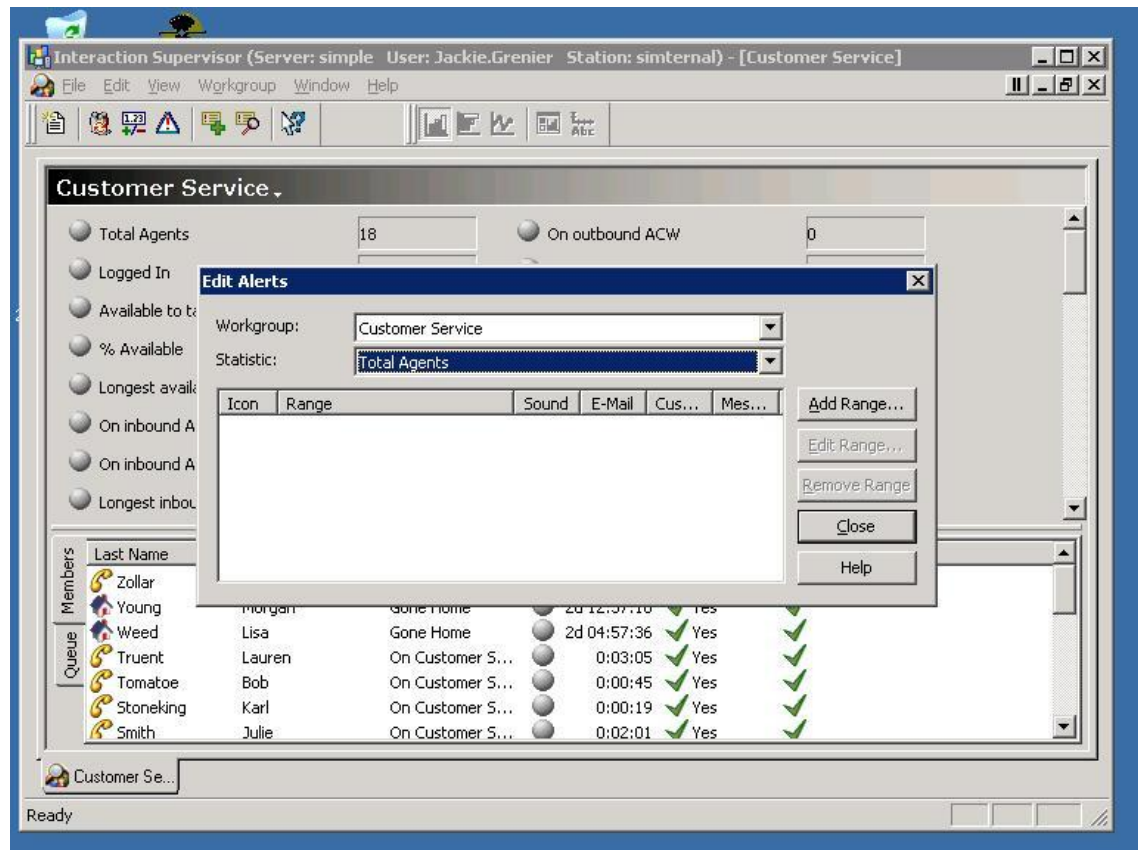
## Alerts – How to Add – Cont'd

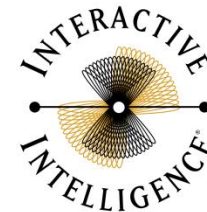
The Edit Alerts dialog is presented.

Here you can select the Workgroup and statistic for which you would like to receive alert.

Then you select Add Range.

The next dialog box is presented.





# Interaction Supervisor

## Alerts – How to Add – Cont'd

The Range dialog is presented next for the Statistic selected. In this case is Logged in.

Notice the different tabs.

Range

Display

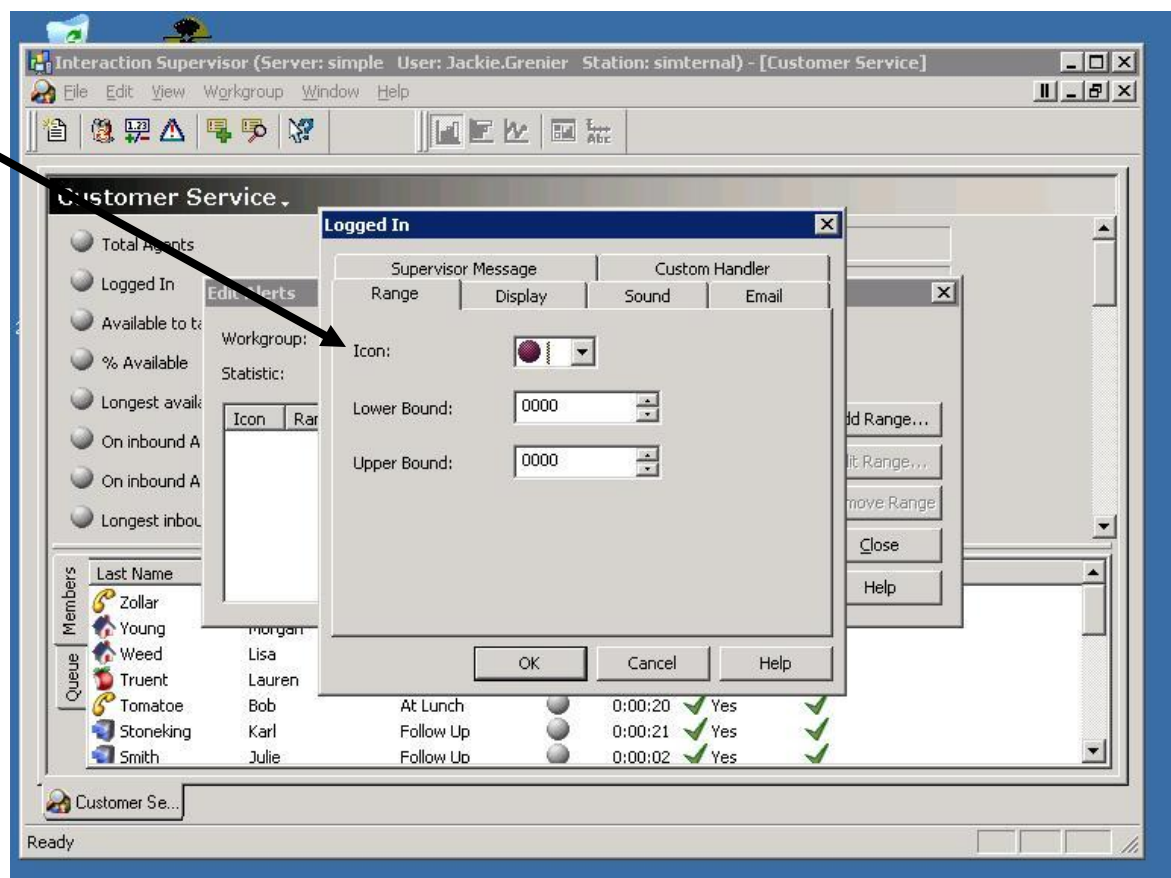
Sound

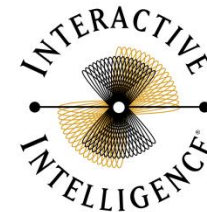
Email

Custom Handler

Supervisor Message

This basically details the configuration and behaviour of this alert.





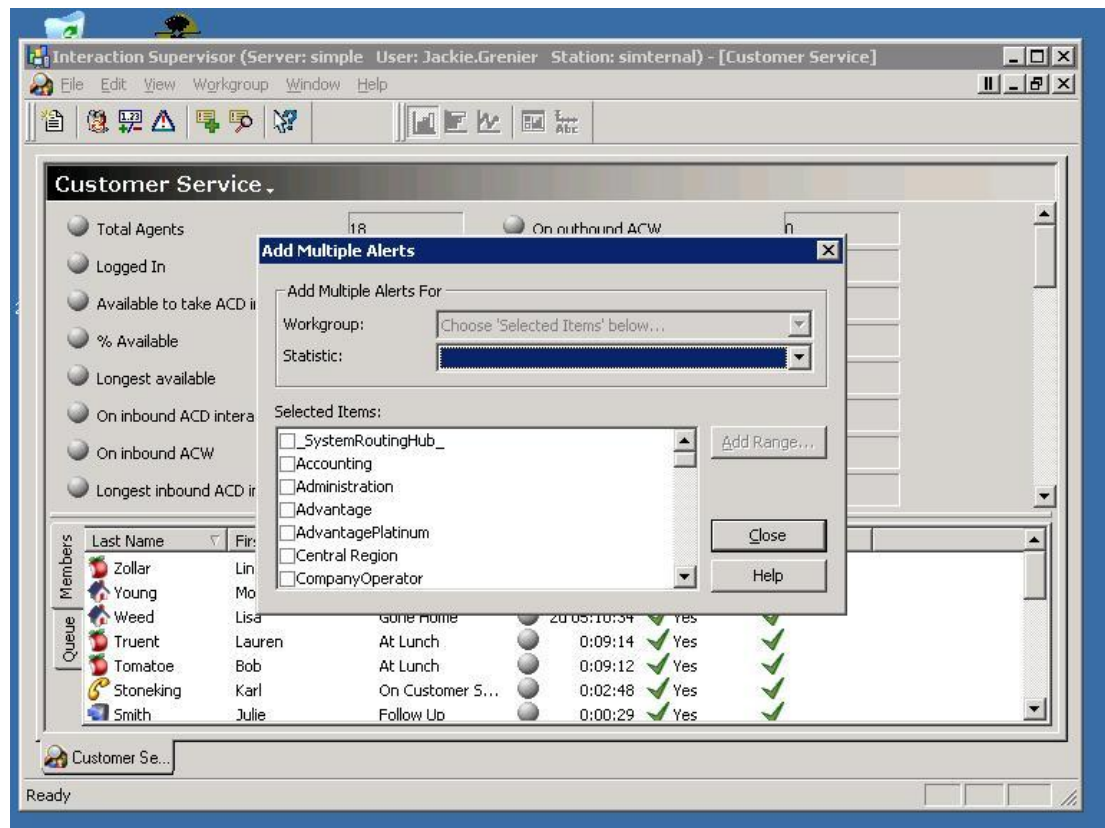
# Interaction Supervisor

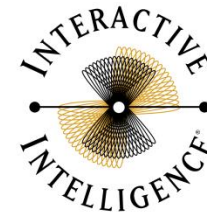
## Alerts – Add Multiple Alerts

From Workgroup dropdown select Add Multiple Alerts.

The dialog is present to selected an alert for more than one Workgroup/Statistic. This is helpful when you want the same type of Alert across several workgroups.

After this selection the Range Dialog will be presented. Same options as adding a single alert.





# Interaction Supervisor

## Alerts – Viewing

To display the status of active alerts, open the Active Alerts dialog.

Select the View drop down. Select Active Alerts.

It displays the current value of each alert statistic, the time when the alert occurred, and other information.

The screenshot shows the Interaction Supervisor software interface. The title bar reads "Interaction Supervisor (Server: simple User: Jackie.Grenier Station: simternal) - [Customer Service]". The menu bar includes File, Edit, View, Workgroup, Window, and Help. The View menu is open, showing options like Toolbars..., Status Bar, Slide Show, Full Screen, F11, Active Alerts (highlighted), Manage Alerts..., Supervisor Messages, and Assistance Requests... The main window displays various alert statistics and a table of active alerts.

Alert Type	Value
Total	
Logge	
Avail	
% Available	0.00
Longest available	N/A
On inbound ACD interactions	3
On inbound ACW	0
Longest inbound ACD interaction	0:05:32
On outbound ACW	0
Longest outbound ACD interactions	N/A
On non-ACD interactions	0
Longest non-ACD interactions	N/A
Interactions waiting	3
Interactions answered	3
Longest interaction waiting	0:03:21
Longest talk time	0:02:59

Members	Last Name	First Name	Status	Time in Status	Logged In	Activated
	Zollar	Linda	At Lunch	0:15:47	Yes	✓
	Young	Morgan	Gone Home	2d 13:16:50	Yes	✓
	Weed	Lisa	Gone Home	2d 05:17:08	Yes	✓
Queue	Truent	Lauren	At Lunch	0:15:48	Yes	✓
	Tomatoe	Bob	At Lunch	0:15:46	Yes	✓
	Stoneking	Karl	On Customer S...	0:00:49	Yes	✓
	Smith	Julie	On Customer S...	0:01:13	Yes	✓

Customer Se... Shows the currently active Alerts