

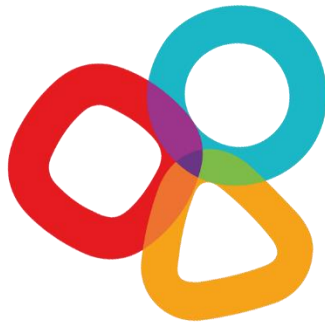
HERMES.NET V5

Documentation

Agent Administration

AGENT & SUPERVISOR ACCOUNTS

User Manual



Product	Hermes.Net	Version Document	1.0
Category	User Manuel	Date Version	September 2017
Version	5.5	Approbation	Product Manager



CONCERNING THIS DOCUMENT

This document provides a description of the **Vocalcom Agent configuration tool**.

Our teams will be delighted to bring you their advice and expertise if you feel the need. Do not hesitate to contact us. We will gladly guide and assist you to fulfill all your needs.

AUDIENCE

This document is aimed at people who use and set up **Agent configuration** at an operational level.

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REVISIONS HISTORY

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0.3	08-24-2017	Content update after JCO review
1.0	09-22-2017	Validated version

REFERENCE DOCUMENT

Document version	Date	Revision Description
Hermes.Net V5		
Manager Dashboard		

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1. WHAT IS THIS DOCUMENT ?

The aim of this document is to explain how to create and install step by step the common features of a campaign on Hermes Net, with screenshots and shorts instructions.

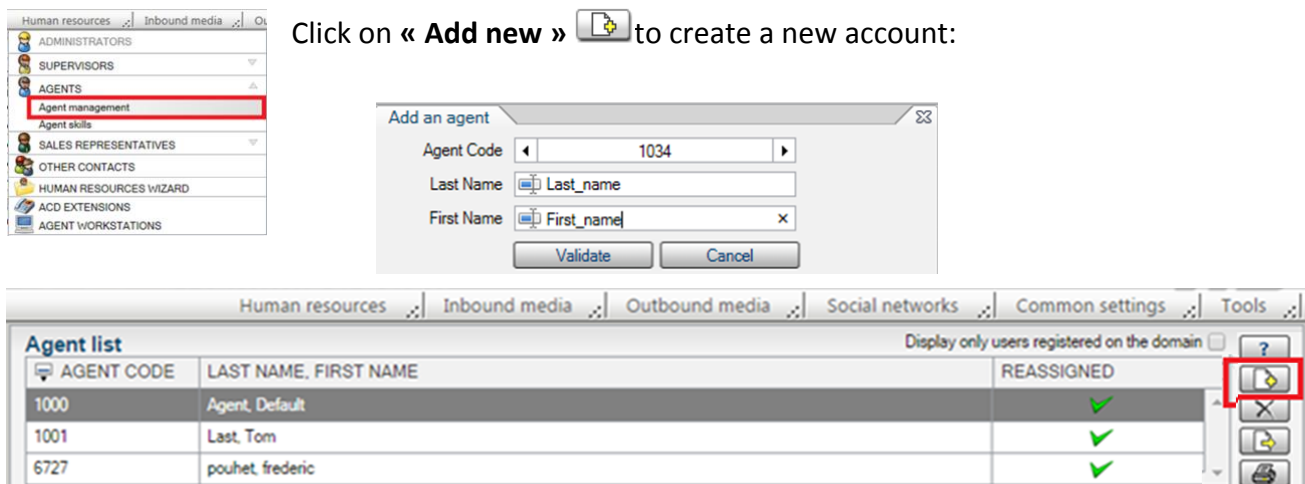
2. STEP BY STEP

To set up your campaign, you must go through several important steps, described below. The order given here is generally considered the best, although it is possible to follow a different order. Once you get familiar with the Hermes system, you'll be able to follow the order you like best, but for starters, we recommend that you follow the order and instructions given here.

3. CREATE AGENTS ACCOUNTS

Click on « **Human Resources** », then under « **Agents** » select « **Agent management** ».

Click on « **Add new** »  to create a new account:




The screenshot shows the 'Add an agent' dialog box with the following fields:

- Agent Code: 1034
- Last Name: Last_name
- First Name: First_name

Buttons: Validate, Cancel

Below the dialog is the 'Agent list' table:

AGENT CODE	LAST NAME, FIRST NAME	REASSIGNED
1000	Agent, Default	✓
1001	Last, Tom	✓
6727	pouhet, frederic	✓

Creating an agent/supervisor account is similar. Each account receives a **4 digit Agent code or login** (for ex. 1000), and a **4 digit password (letters)**, that can be changed by clicking the  button.

You can configure the following tabs:

- ✓ **General** : general information, **hang-up after call** (useful if agents don't use headsets), **automatically ready** options (to reduce the time between worked times = call + wrap-up), automatic pick up (softphones & Avaya), media blending, and agent's personals callback.

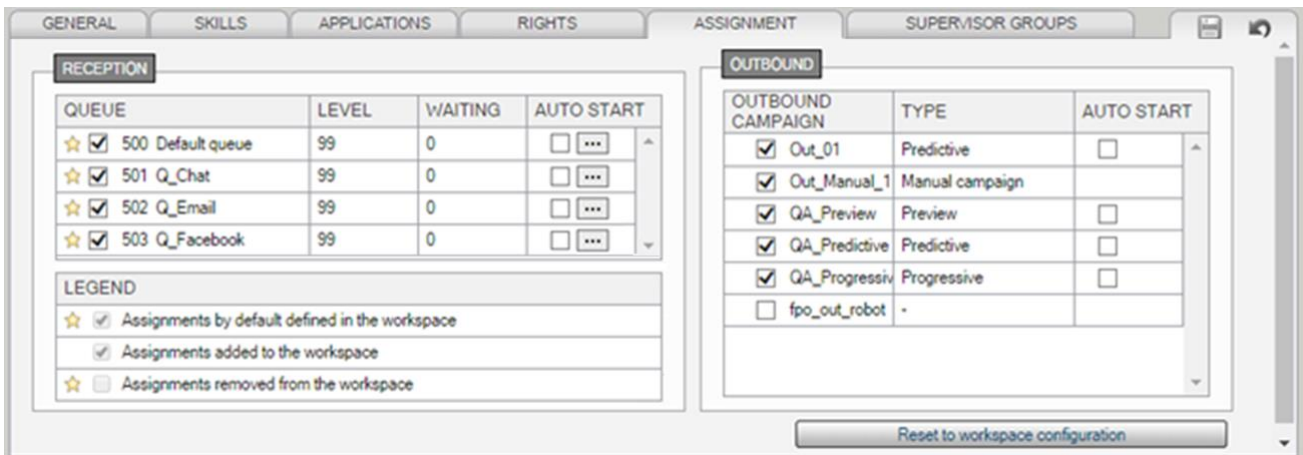


- ✓ **Skills** : assign skillgroups and relevant levels to the agent.

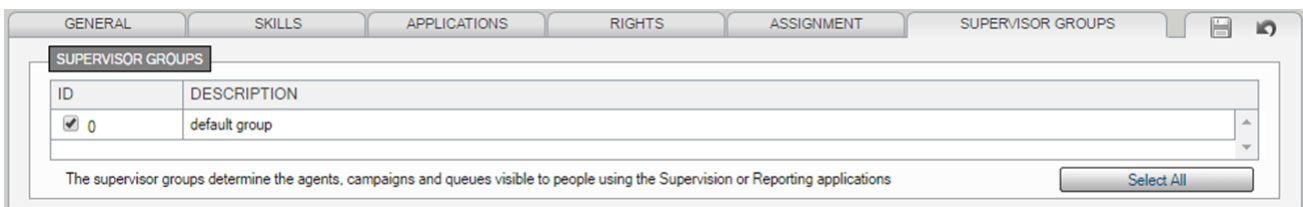
- ✓ **Applications** : assign the workspace you want, its display parameters, and supervision/rights to the group if you wish to do so.

- ✓ **Rights** : assign phone rights, supervision rights (if selected under the previous tab), and media blending rights if necessary.

- ✓ **Assignment** : assign inbound queues and outbound campaigns. In the « **Reception** » section, « **Auto start** » column, clicking on ******* to set at least one campaign of the related queue in auto start mode (otherwise, the agent will have to start it manually in his workspace).



- ✓ **Supervisor groups** : As well as an agents group , it is possible to create a supervision group and assign agents and supervisors to it. In the case of a big team, it reduces the scope of supervisors to a particular group of agents.



4. CREATE SUPERVISORS ACCOUNTS

In order to create a supervisor, you just need to, when creating an agent account, give him supervision and reporting (*optional*) rights. This account will be automatically bumped to supervisor level, and the user will have access to the Supervision and Reporting modules.

You can also directly create a Supervisor account in the **Supervisor** menu of **Human Resources**, using the same principles as agent creation, if you wish to do so.

5. CREATE ACCOUNTS VIA THE WIZARD

Another way to create an account is to use the « **Human Resources Wizard** ».

Connect to Hermes.Net, select the site in the « **Applications** » tab, select the wizard « **Human Resources** » in the « **Administration** » sub-tab, and click on « **Launch the selected wizard** ».



1 - HUMAN RESOURCES SUMMARY

Icon	Count	Resource Type	Actions
	1	ADMINISTRATOR(s)	ADD > IMPORT > MANAGE >
	3	AGENT(s) PLUS 52 INACTIVE	IMPORT > MANAGE >
	3	SUPERVISOR(s)	ADD > IMPORT > MANAGE >
	1	SALES REPRESENTATIVES	ADD > IMPORT > MANAGE >
	1	OTHER CONTACT(s)	ADD > IMPORT >
	0	SUPERVISOR GROUP(s)	MANAGE >
	1	AGENDA(s)	MANAGE >

Click on « Next » to reach Step 2 : configuring the data import.

2 - IMPORT

2.1 - Select a data source
2.2 - Import filter
2.3 - Column mapping
2.4 - Checking
2.5 - Data import

3 - ADMINISTRATOR MANAGEMENT
4 - AGENT MANAGEMENT
5 - SUPERVISOR MANAGEMENT
6 - SALES REPRESENTATIVE MANAGEMENT
7 - EXTERNAL CONTACTS MANAGEMENT
8 - GRP SUPERVISION MANAGEMENT
9 - SALES REPRESENTATIVE SCHEDULE MANAGEMENT
10 - CLIENT CHARACTERISTICS MANAGEMENT

IMPORT
SELECT THE RESOURCE TYPE TO IMPORT

- ADMINISTRATOR
Minimum columns: code, password, first name, last name
- Agents
Minimum columns: code, password, first name, last name
- Supervisors
Minimum columns: code, password, first name, last name
- SALES REPRESENTATIVES
Minimum columns: code, password, first name, last name

Select the file from which you want to import the list of agents.

2.1 - SELECT A DATA SOURCE

2.2 - Import filter
2.3 - Column mapping
2.4 - Checking
2.5 - Data import

3 - ADMINISTRATOR MANAGEMENT
4 - AGENT MANAGEMENT
5 - SUPERVISOR MANAGEMENT
6 - SALES REPRESENTATIVE MANAGEMENT
7 - EXTERNAL CONTACTS MANAGEMENT

IMPORT - Select a data source

SELECT A DATA SOURCE TO IMPORT
Supplier: Excel 5.0 (*.xlsx) file
File: _source.xlsx

DATA SOURCE PARAMETERS
Sheet: Feuil1
First line contains column names

OVERVIEW OF THE SOURCE
NUMBER OF RECORDS TO BE IMPORTED : 52

SCIVIL	SNOM	SPRENOM	SBIRTH	STEL	SCITY	
Mr	abel			123456789	Montpellier	
Mr	bob			123456789	Paris	
Mr	chris			123456789	Lyon	

You can set a filter, if you want to import only part of the agents listed in the file.

2.2 - IMPORT FILTER

2.3 - Column mapping
2.4 - Checking
2.5 - Data import

3 - ADMINISTRATOR MANAGEMENT
4 - AGENT MANAGEMENT
5 - SUPERVISOR MANAGEMENT

IMPORT - Import filter

CREATE A FILTER
No filter currently defined. Add a filter

OVERVIEW OF THE SOURCE
NUMBER OF RECORDS TO BE IMPORTED : 52

SCIVIL	SNOM	SPRENOM	SBIRTH	STEL	SCITY	
Mr	abel			123456789	Montpellier	
Mr	bob			123456789	Paris	
Mr	chris			123456789	Lyon	



Match the columns of the file with the fields in Hermes.

SCIVIL	SNOM	SPRENOM	SBIRTH	STEL	SCITY
Mr	abel			123456789	Montpellier
Mr	bob			123456789	Paris
Mr	chris			123456789	Lyon

Check that the agents you want to import are properly listed.

SCIVIL	SNOM	SPRENOM	SBIRTH	STEL	SCITY
Mr	abel			123456789	Montpellier
Mr	bob			123456789	Paris

SCIVIL	SNOM	SPRENOM	SBIRTH	STEL	SCITY
Mr	abel			123456789	Montpellier
Mr	bob			123456789	Paris

Click on « Next » to reach Step 3 : Administrators management.

Administrators list

Sort by: Account

Filter: [Search]

Renan Letohic

Add an administrator

Account: admin Password: [Masked]

First Name: [Field] Last Name: [Field] Gender: M F

[CREATE]



Click on « Next » to reach Step 4 : Agents management.

CREATE / MODIFY HUMAN RESOURCES

Hermes.Net Wizards

1 - HUMAN RESOURCES SUMMARY
2 - IMPORT
3 - ADMINISTRATOR MANAGEMENT
4 - AGENT MANAGEMENT
4.1 - Agent
4.2 - Assignments
4.3 - Print
5 - SUPERVISOR MANAGEMENT
6 - SALES REPRESENTATIVE MANAGEMENT
7 - EXTERNAL CONTACTS MANAGEMENT
8 - GRP SUPERVISION MANAGEMENT
9 - SALES REPRESENTATIVE SCHEDULE MANAGEMENT
10 - CLIENT CHARACTERISTICS MANAGEMENT

AGENT MANAGEMENT

55 AGENTS DEFINED IN THE SYSTEM.
YOU CAN SPECIFY A FILTER TO REDUCE THE NUMBER OF AGENTS DISPLAYED.

Select which filter to apply.

No filter Display: Active AND inactive agents

Select agents from code : 1 to code : 2

Select agents with first name : 3 and last name : 3

Men Women Both

Select agents using this workspace

--- NONE ---

Display the agents assigned to one of these queue(s)

--- NONE ---

Default queue
Q_Chat
Q_Email
Q_Facebook

Select agents belonging to one of these supervisor groups

--- NONE ---
default group

Display the agents using one of these outbound campaigns

--- NONE ---
Out_01
QA_Predictive
QA_Preview
fpo_out_robot

1: if empty> only agents whose code is less than code 2 are displayed.
2: if empty> only agents whose code is greater than code 1 are displayed.
3: use character % for advanced searches.

COUNT

CREATE / MODIFY HUMAN RESOURCES

Hermes.Net Wizards

1 - HUMAN RESOURCES SUMMARY
2 - IMPORT
3 - ADMINISTRATOR MANAGEMENT
4 - AGENT MANAGEMENT
4.1 - AGENT
4.2 - Assignments
4.3 - Print
5 - SUPERVISOR MANAGEMENT
6 - SALES REPRESENTATIVE MANAGEMENT
7 - EXTERNAL CONTACTS MANAGEMENT
8 - GRP SUPERVISION MANAGEMENT
9 - SALES REPRESENTATIVE SCHEDULE MANAGEMENT
10 - CLIENT CHARACTERISTICS MANAGEMENT

AGENT MANAGEMENT - Agent

Agent list

Sort by: Code

Filter:

- 1000 : Default Agent (Reassigned)
- 1001 : Tom Last (Reassigned)
- 1002 : abel
- 1003 : bob
- 1004 : chris

Add agents

Code Next code available Or

First Name Last Name

Agent can use reporting Maximum chat sessions

Create agent(s), using the name as prefix.

CREATE / MODIFY HUMAN RESOURCES

Hermes.Net Wizards

1 - HUMAN RESOURCES SUMMARY
2 - IMPORT
3 - ADMINISTRATOR MANAGEMENT
4 - AGENT MANAGEMENT
4.1 - Agent
4.2 - ASSIGNMENTS
4.3 - Print
5 - SUPERVISOR MANAGEMENT
6 - SALES REPRESENTATIVE MANAGEMENT
7 - EXTERNAL CONTACTS MANAGEMENT
8 - GRP SUPERVISION MANAGEMENT
9 - SALES REPRESENTATIVE SCHEDULE MANAGEMENT

AGENT MANAGEMENT - Assignments

BACK TO FILTER

0/55 Agent(s)

Sort by: Code Display: Simple

1000	Default Agent	1001	Tom Last	1002	abel	1003	bob	1004	chris
1005	dennis	1006	earl	1007	fanny	1008	gary	1009	henry

Agent workspace

Default workspace test ws_fpo_2 WS_FPO_Default

Supervisor group

Is in this(these) supervisor group(s)



CREATE / MODIFY HUMAN RESOURCES

Hermes.Net Wizards

1 - HUMAN RESOURCES SUMMARY
2 - IMPORT
3 - ADMINISTRATOR MANAGEMENT
4 - AGENT MANAGEMENT
4.1 - Agent
4.2 - Assignments
▶ 4.3 - PRINT
5 - SUPERVISOR MANAGEMENT
6 - SALES REPRESENTATIVE MANAGEMENT
7 - EXTERNAL CONTACTS MANAGEMENT
8 - GRP SUPERVISION MANAGEMENT
9 - SALES REPRESENTATIVE SCHEDULE MANAGEMENT
10 - CLIENT CHARACTERISTICS MANAGEMENT

AGENT MANAGEMENT - Print

55 Agent(s) to print

Print Password :
Print workspaces :
Print sup. grp. :
Print a comment :

AGENT LIST 03-08-2017 To 15:42

Code	First Name	Last Name	Password	Workspace	Supervision Grp.
1000	Default	Agent	test	Default workspace	default group
1001	Tom	Last	otqa	test	default group
1002		abel	vssv		default group

Click on « Next » to reach Step 5 :Supervisor management.

CREATE / MODIFY HUMAN RESOURCES

Hermes.Net Wizards

1 - HUMAN RESOURCES SUMMARY
2 - IMPORT
3 - ADMINISTRATOR MANAGEMENT
4 - AGENT MANAGEMENT
▶ 5 - SUPERVISOR MANAGEMENT
5.1 - Assignments
6 - SALES REPRESENTATIVE MANAGEMENT
7 - EXTERNAL CONTACTS MANAGEMENT
8 - GRP SUPERVISION MANAGEMENT
9 - SALES REPRESENTATIVE SCHEDULE MANAGEMENT

SUPERVISOR MANAGEMENT

Supervisor list.

Sort by : Code

Filter :

- Default Agent
- Tom Last

Add supervisors

Code : Or next code available

Gender : M F

First Name : Last Name :

CREATE

CREATE / MODIFY HUMAN RESOURCES

Hermes.Net Wizards

1 - HUMAN RESOURCES SUMMARY
2 - IMPORT
3 - ADMINISTRATOR MANAGEMENT
4 - AGENT MANAGEMENT
5 - SUPERVISOR MANAGEMENT
▶ 5.1 - ASSIGNMENTS
6 - SALES REPRESENTATIVE MANAGEMENT
7 - EXTERNAL CONTACTS MANAGEMENT

SUPERVISOR MANAGEMENT - Assignments

Sort by : Code Display : Simple

1000 Default Agent 1001 Tom Last 6727 frederic pouhet

Supervisor groups

can supervise highlighted group

Click on « Next » to reach Step 6 : Sales representatives management.

CREATE / MODIFY HUMAN RESOURCES

Hermes.Net Wizards

1 - HUMAN RESOURCES SUMMARY
2 - IMPORT
3 - ADMINISTRATOR MANAGEMENT
4 - AGENT MANAGEMENT
5 - SUPERVISOR MANAGEMENT
▶ 6 - SALES REPRESENTATIVE MANAGEMENT
7 - EXTERNAL CONTACTS MANAGEMENT
8 - GRP SUPERVISION MANAGEMENT
9 - SALES REPRESENTATIVE SCHEDULE MANAGEMENT
10 - CLIENT CHARACTERISTICS MANAGEMENT

SALES REPRESENTATIVE MANAGEMENT

Sales representative list

Sort by : Account

Filter :

- Jack Sales

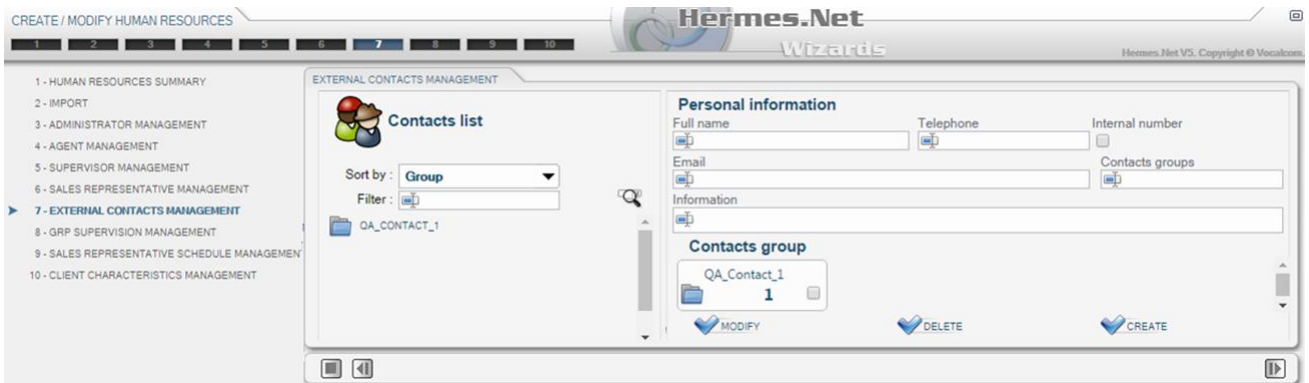
Add a sales representative


Code : admin Password :

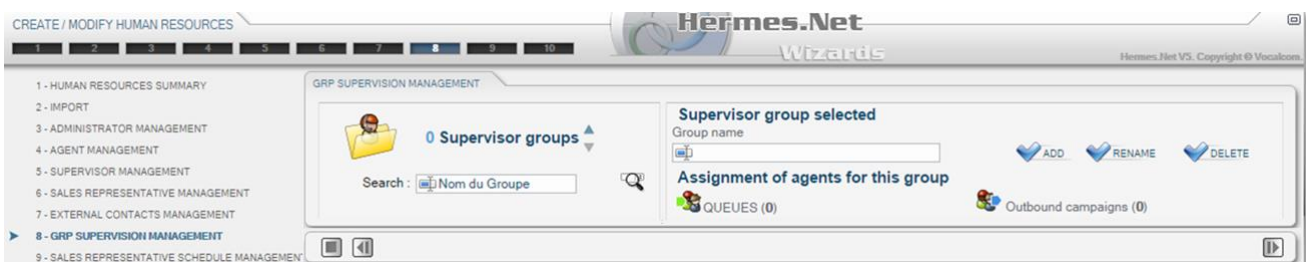
User state

- Main user Sales representative has a web access and agents can make appointments for him/her.
- Secondary user This sales representative has web access but agents cannot schedule appointments for him/her.
- Disabled user The sales representative does not have web access and agents cannot schedule appointments for him/her.

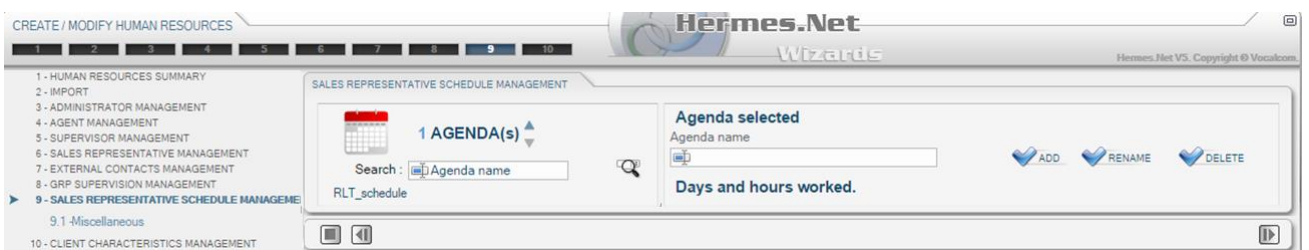
Click on « Next » to reach Step 7 : External contacts management.




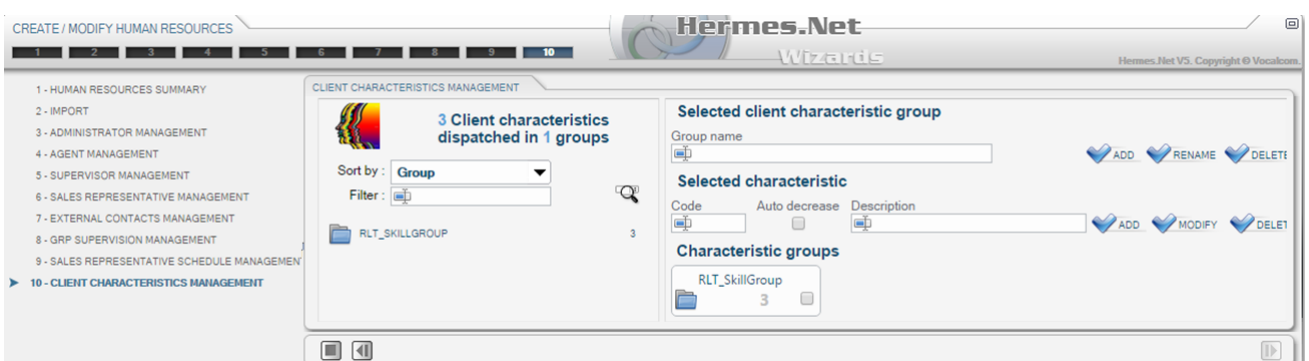
Click on « Next »  to reach Step 8 : Supervisor groups management.



Click on « Next »  to reach Step 9 : Sales representatives agenda management.



Click on « Next »  to reach Step 10 : Clients characteristics management.



At the last stage of the wizard, click on « QUIT » .