

Administration Hermes.Net V5



Author: François Tarrida
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TABLE OF CONTENTS

1. Introduction	4
1.1 To begin with	4
2. The welcome screen	4
2.1 Applications Tab	6
2.1.1 ROOT/Master admin applications.....	7
2.2 Buttons	8
2.3 Configuration tab	8
2.4 The admin profiles.....	9
2.4.1 Root Admins.....	10
2.4.2 Site Admins.....	10
2.5 Admin accounts	10
2.5.1 Adding a new admin.....	10
2.5.2 Deleting an admin.....	10
2.5.3 General tab.....	11
2.5.4 Rights tab	11
3. ROOT Administration	12
3.1 Company/Site choice	12
3.2 Company Management.....	13
3.2.1 General tab	13
3.2.2 License tab.....	13
3.2.3 Components tab	14
3.2.4 Database tab.....	14
3.3 Site Management in ROOT	14
3.3.1 General tab.....	15
3.3.2 License tab.....	15
3.3.3 Components tab	16
3.3.4 Database tab.....	16
3.3.5 Telephony tab.....	17
3.3.6 Backup tab.....	17
3.4 Top menus	18
3.4.1 Resources	18
3.4.2 Human Resources	20
3.4.3 Incoming Media	20
3.4.4 Outgoing Media	20
3.4.5 Tools	21
4. SITE Administration	22
4.1 Difference with the Root Admin account	22
4.2 Top menus	23
4.3 Human Resources.....	23
4.3.1 Administrators.....	24
4.3.2 Supervisors.....	24
4.3.3 Agents.....	25
4.3.4 Salesmen.....	26
4.3.5 Contacts/Human Resources Wizard	27
4.3.6 ACD Extensions/Workstations	27
4.4 Incoming media	28
4.4.1 Inbound calls.....	30
4.4.2 Inbound fax	34
4.4.3 Incoming emails	34
4.4.4 Web campaigns	36
4.5 Outgoing media	37
4.5.1 Outbound calls.....	39
4.5.2 Manual call options.....	42
4.5.3 Black list.....	42
4.6 Social networks.....	42
4.6.1 Facebook/Twitter.....	43
4.7 Common settings	45
4.7.1 Queues.....	45

4.7.2	Plannings & Holidays plan	46
4.7.3	Answers & messages	48
4.7.4	Address books	50
4.7.5	Pause code.....	51
4.7.6	Qualifications.....	52
4.8	Tools.....	55
4.8.1	SQL console	55
4.8.2	Recorded Conversations.....	56
4.8.3	Sound files management.....	56
4.8.4	Servers monitoring.....	57
4.8.5	About	58
5.	Wizards	58
5.1	Human Resources.....	59
5.2	Queues Management	59
5.3	Web Campaigns	60
5.4	Workspaces Management:	61

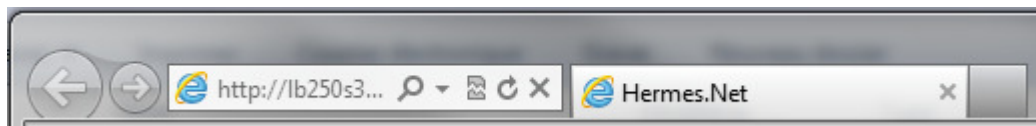
1. Introduction

Hermes Edition V.5 and its applications are mostly managed via the administration module, simply called "Administration". This document explains in detail all the features available within the administration module. Application allows administrators to manage campaigns, queues, agent configurations and many other aspect of all the Hermes related activities.

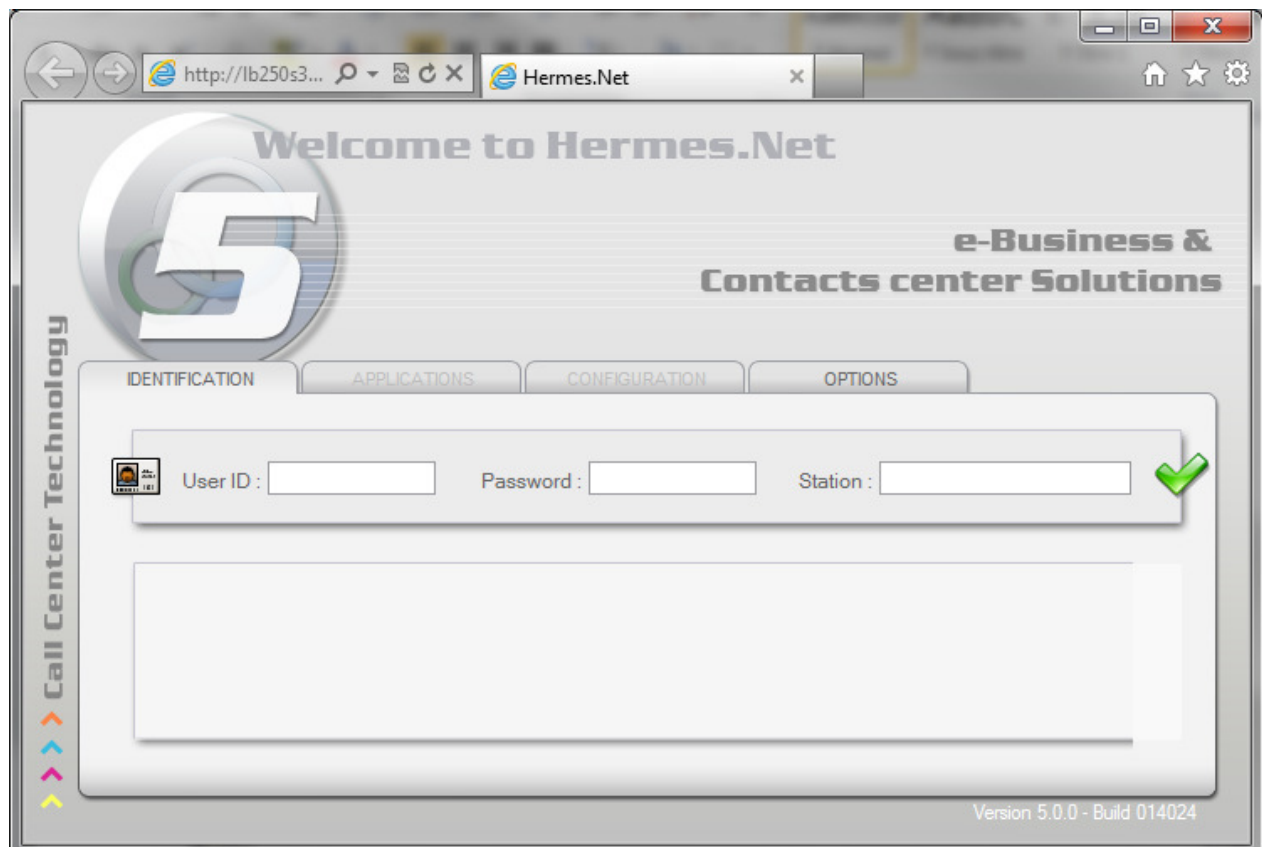
Please note, this "Administration" document is shorter compared to previous Hermes admin documentations. This is intended as such. Specific topics and how-to guides will be published separately, to walkthrough users in different campaign managements.

1.1 To begin with

Once the Hermes platform is installed, or you have access to a distant platform, enter the address of the platform in your internet navigator. All navigators (IE/Chrome/Firefox) will work with Administration.

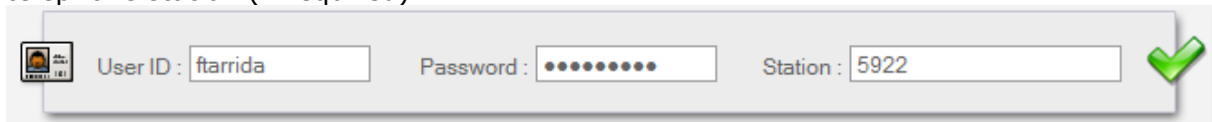


2. The welcome screen



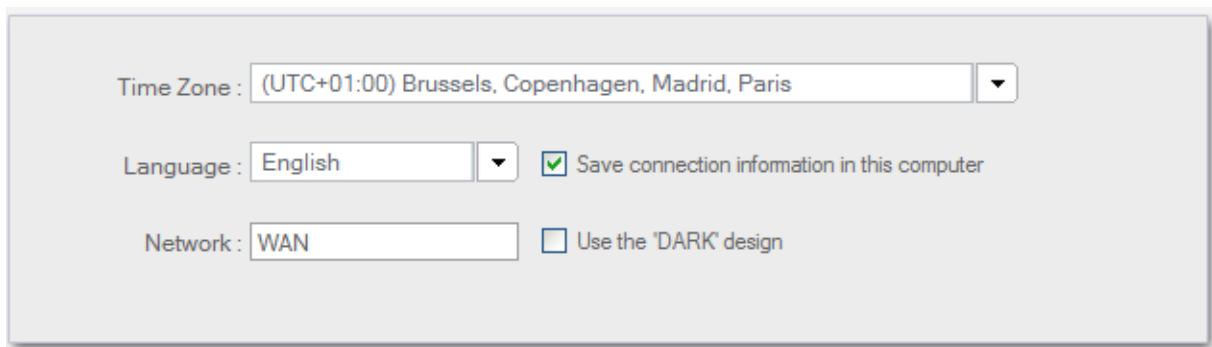
There are four tabs in the welcome screen, two of which are already available while two other are currently greyed out.

-IDENTIFICATION: This is where you will type in your account ID, password and telephone station (if required).



-APPLICATIONS & CONFIGURATION: Greyed out at software opening. We will discuss these two tabs later on.

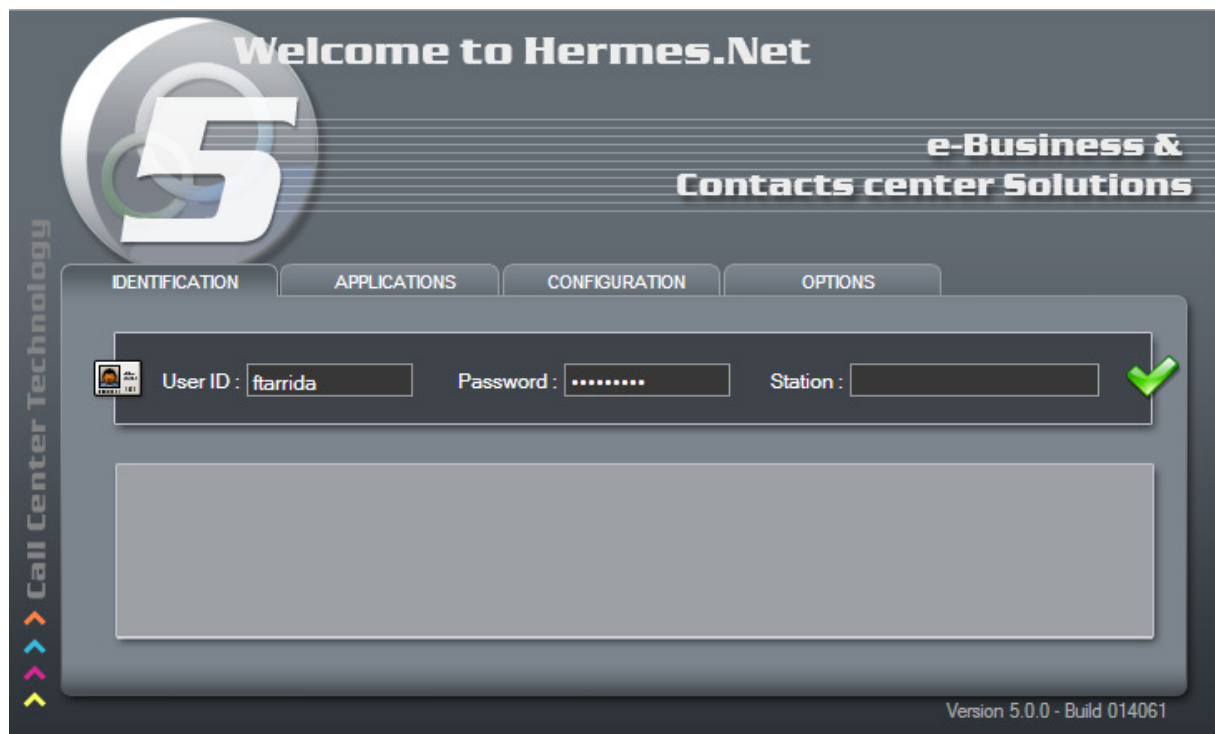
-OPTIONS: Allows you to change the time zone, the application language, the type of network used by the platform, selecting the dark interface design rather than the default light one, and a box to save all this info for next login.



After entering the necessary information, the user presses the Enter key on the keyboard or clicks the Connect button, on which the system checks the data. If the information and password are correct, the Application Selection window appears.



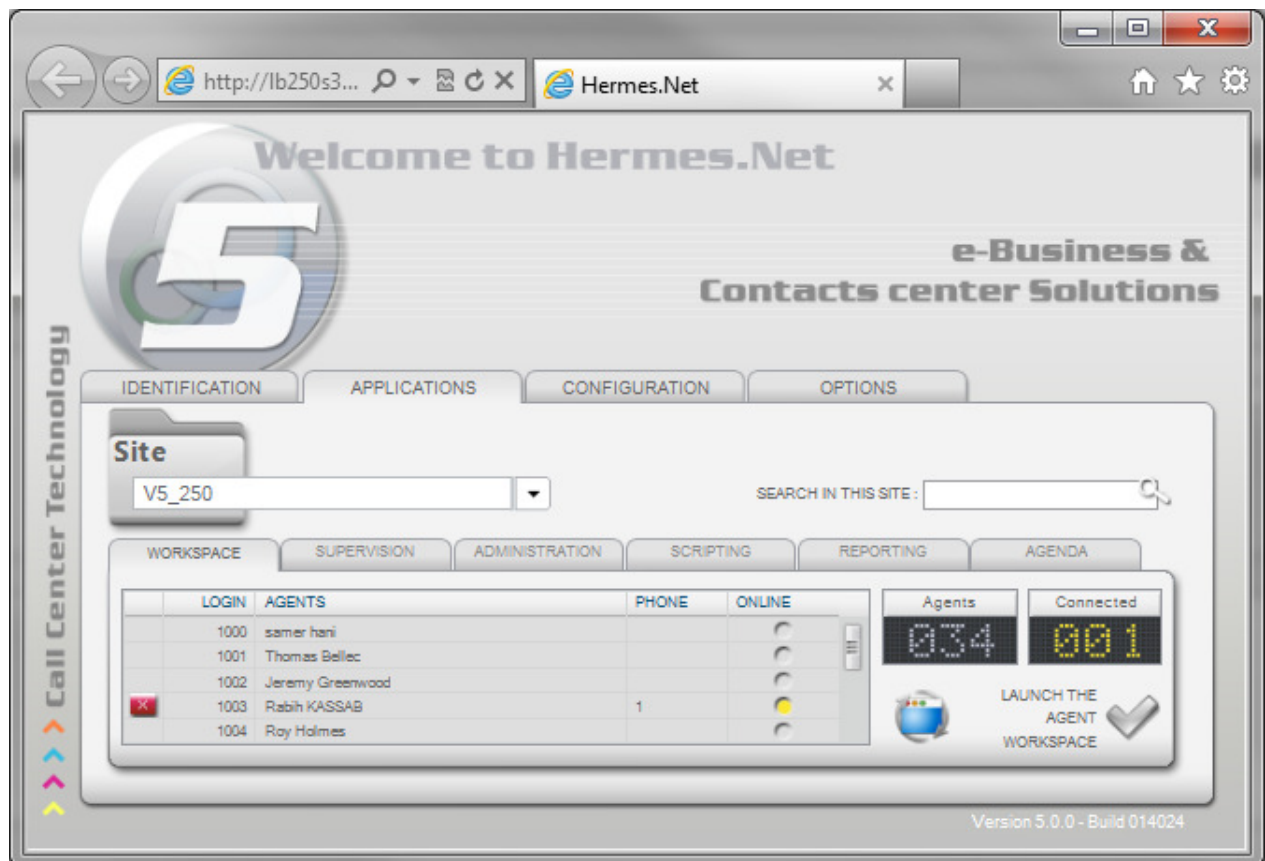
The dark interface:



2.1 Applications Tab

Once logged in, in this tab, the administrator can launch one of the following applications:

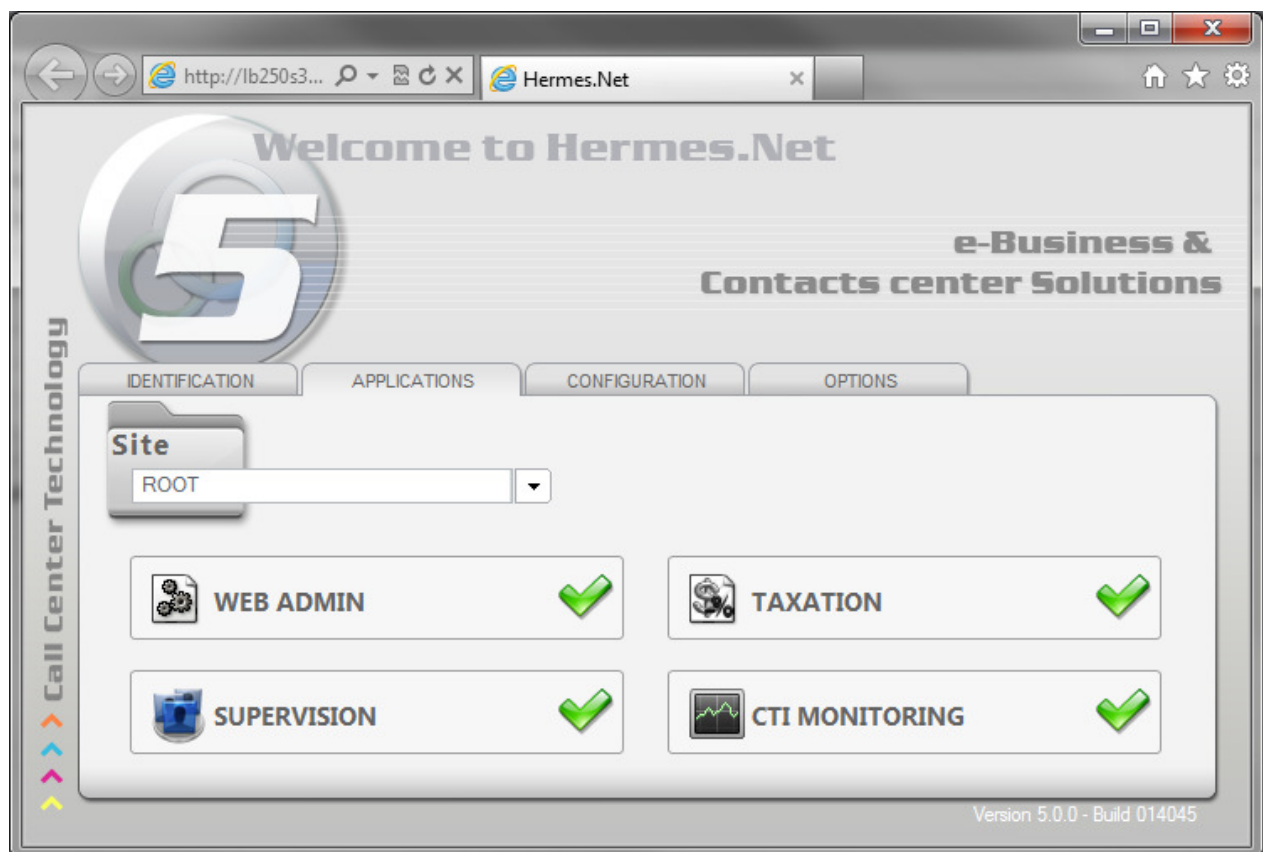
- SITE:** Access the platform ROOT (if ROOT admin) or the SITE.
- WORKSPACE:** select an agent, disconnect him, launch the workspace.
- SUPERVISION:** select a supervision context, launch the module.
- ADMINISTRATION:** launch the module or one the admin wizards.
- SCRIPTING:** launch the module, or open a specific web/IVR script
- REPORTING:** launch the module, the custom reports designer, or one specific report.
- AGENDA:** launch the agenda management screen, or one of the plannings.



2.1.1 ROOT/Master admin applications










As a ROOT or master admin, the applications tab is slightly different. You get access to:

- FULL WEB ADMIN (Root management, etc...)
- General SUPERVISION
- TAXATION reports
- CTI Monitoring tool



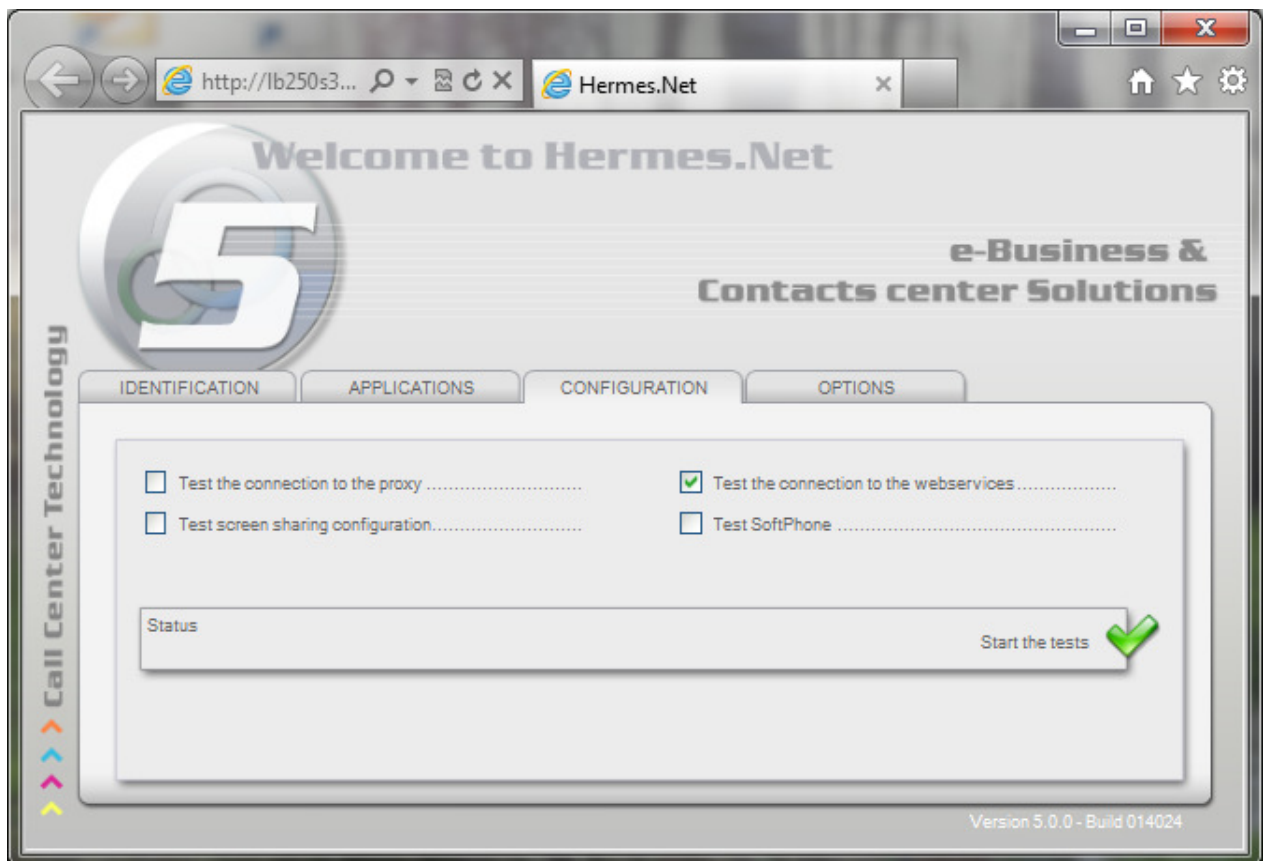
2.2 Buttons

In the administration module, several buttons are usable. The most important are the following ones:

-  allows to see the information about the selected object (who created it, when, who updated it, when).
-  allows to add a new object, as we will see later on.
-  allows to delete an object.
-  to save.
-  to undo changes.
-  to see the important campaign information.
-  to check the servers and retrieve files, etc...
-  to import data from a file, such as agents for example.
-  to print.

2.3 Configuration tab

This tab allows the administrator to test connections to services such as proxies, softphones, etc...



2.4 The admin profiles

Installing the application requires administrator intervention with a "Master" profile (ROOT). You must first initialize the main resources of the system before other users can connect and use the application. This intervention is the last phase of the installation process. It includes the creation of:

- One or more companies or site administrators
- One or more administrators with a ROOT profile
- One or more entities called "Company" or "Site"

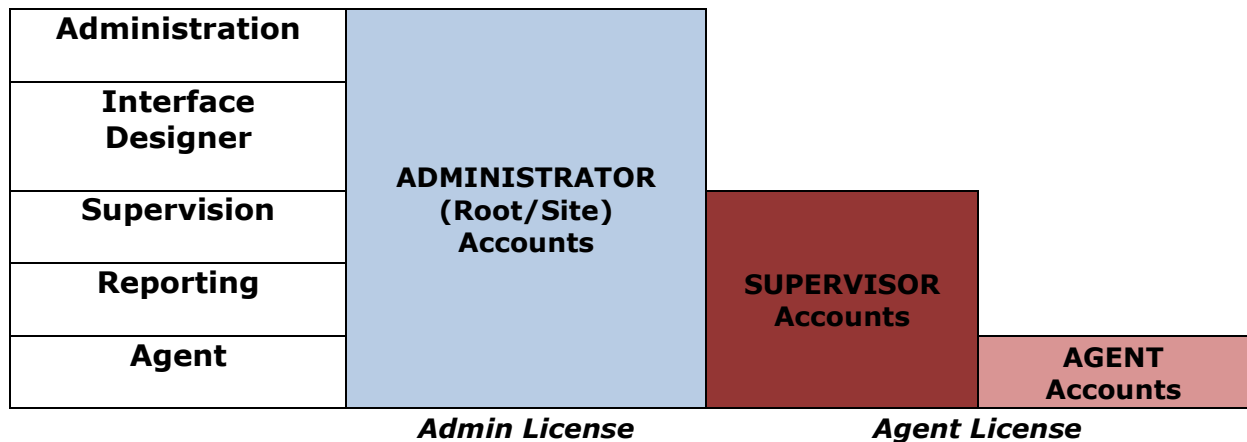
Whereas the first step is optional, the other two are required to enable other users who are defined in the system for future use demand.

In practice, an administrator "ROOT" manages all companies on the platform while a site administrator belongs to a single company or a site and cannot administer its website.

Once the administrator has created the main entities (companies or sites), it can create other administrators and supervisors/agents. They are then allocated to the selected site.

However, these accounts do not see the same menus because they were not granted the same rights:

ACCESS RIGHTS TO THE HERMES MODULES



2.4.1 Root Admins

ROOT admins have full access to the platform, meaning they can work on all sites/companies and also manage root admin for the platform (databases, proxies, DID numbers, etc...)


2.4.2 Site Admins

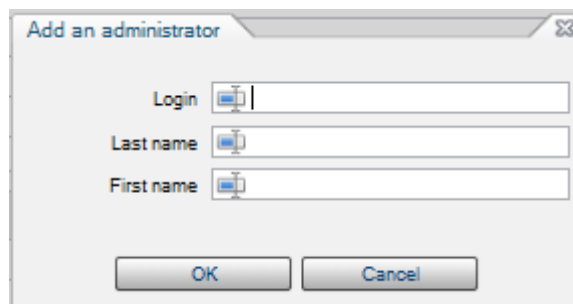
Site admins have limited access to the platform, meaning they can work only on the site/company to which they belong.

2.5 Admin accounts

You get access to the menu in the administrators' management window defined in the main system. Only a root administrator access to the root (see screen print at the top left of the window) at the request, and only a primary administrator can create other senior administrators. With the buttons and you can create or remove administrators.


2.5.1 Adding a new admin

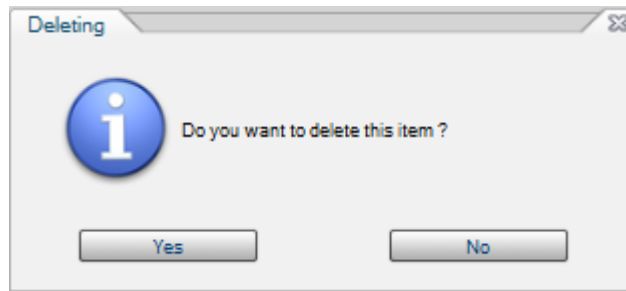
If you click on the  button, the following dialog box pops up:



Type in the desired Login, Last name, First name and validate by pressing the "OK" button. Admin Logins can be whatever you want.

2.5.2 Deleting an admin

Select the element to be deleted from the list and click on the  button. The following confirmation message pops-up:





Click on the "Yes" button to confirm the deletion of this administrator account.

2.5.3 General tab

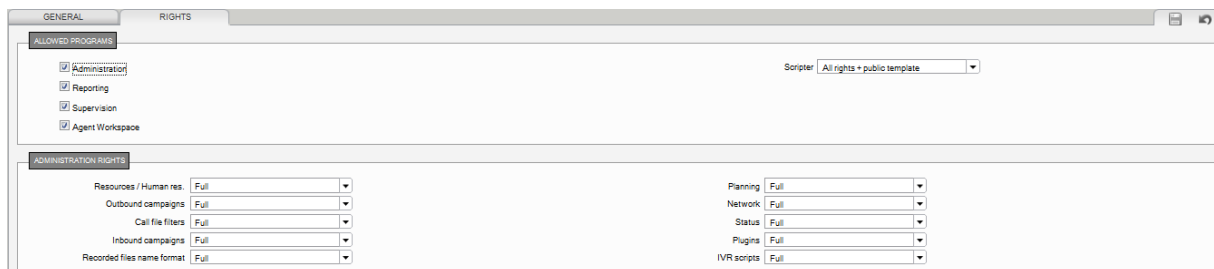
Within the general tab you can define the admin's personal info.



You can modify the first name, last name, login and password (anything you want) of this account. When done, click on the  button to save, or the  button to undo your changes.

2.5.4 Rights tab

The Rights tab is used to define the admin access rights.



In the **Allowed Programs** area (top), you can select the applications at the disposal of the administrator on the application selection window (Interface designer, Supervision, Reporting, Agent).

In the **Rights** area (bottom), you can define the administrator's access rights with regard to the following menus of the administration module: Resources, Inbound and Outbound campaigns, IVR scripts, planning, network, call status.

For each of the elements, you can specify:

- **None:** the administrator has no access to the menu at all
- **Read:** the administrator can only read information
- **Modify:** the administrator can make changes to the parameters
- **Full rights:** the administrator can add and delete elements of that type

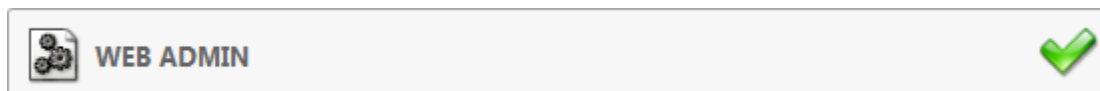
These applications are available depending on the rights given to that particular administrator. If only one application was made available to him, the system will automatically launch it. If not, the user must press the button next to the application he wants to start.

This document explains the Administration application; the other Hermes V5 applications are discussed in separate documents.

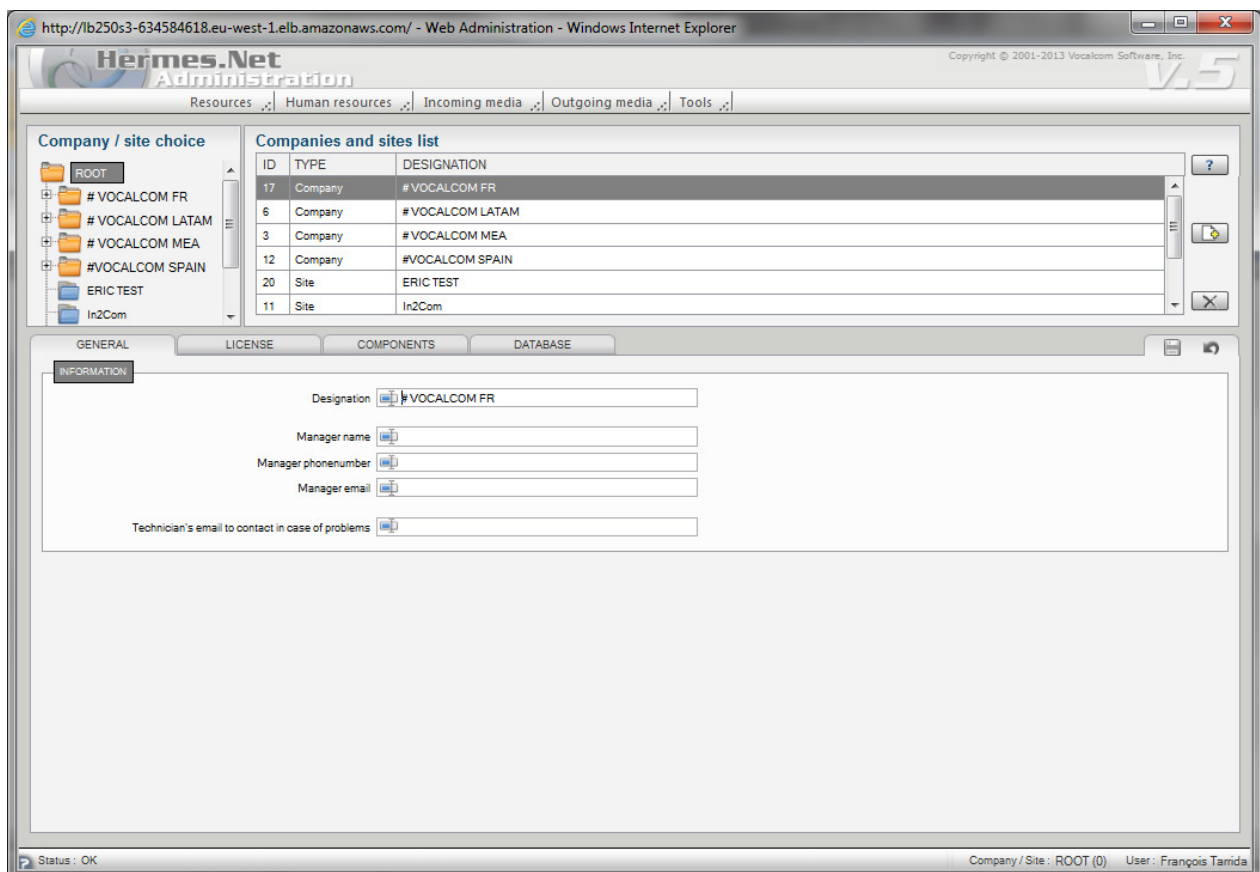
Depending on the type of administrator identified (ROOT or Site), the main Administration window displays different elements, and all of them will be explained in further detail in this document.

3. ROOT Administration

As ROOT Admins, users have full access to the platform, and therefore can manage the ROOT part of the platform, as well as all the sites built into it. To manage the ROOT, users will open the Admin module by clicking on the following tab:



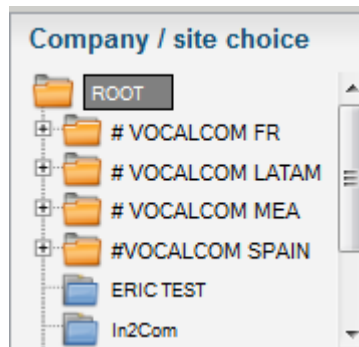
The module opens up in a pop-up, displaying the following screen:



3.1 Company/Site choice

These entities allow you to create and manage agents, campaigns, queues, administrators, etc... This will be restricted to their own entity. This restriction allows keeping the data (reporting, supervision, scripter editor) of every site independent from each other.

They are presented in a tree diagram in the upper right side of the screen. This view allows easy visualization of companies and sites to which access is granted, as well as their organization and structure.



A company can be composed of several sites or branches (sub-companies).

Administrators defined at company level only have access to the entities that are part of it.

A site is the smallest unit and cannot contain other entities such as sub-sites or sub-companies.

The name of the company or site is displayed in the status bar on the lower right side of the screen, as shown above.

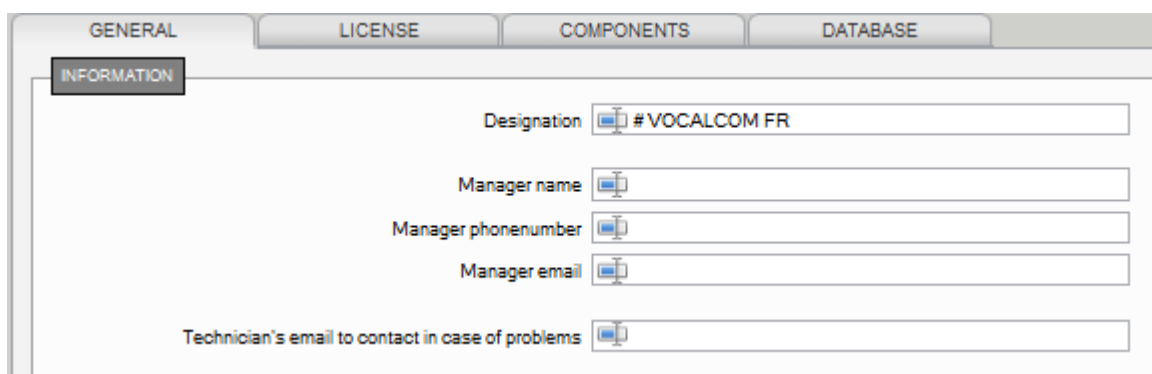
3.2 Company Management

Under "Resources", the first menu is "Companies/Sites". Under "Companies and sites list", several tabs will allow us to modify the Company level.

3.2.1 General tab

Under "General", we can modify the following elements:

- Designation** of the company
- Manager** details
- IT technician** email address



3.2.2 License tab

Under "License", we can modify the following elements:

- Maximum** lines
- Maximum** campaigns and queues
- Maximum** connected agents for each media

GENERAL	LICENSE	COMPONENTS	DATABASE
LICENSE PARAMETERS			
<input checked="" type="checkbox"/> Allow telephony campaigns			
Maximum telephony lines	<input type="text" value="5"/>	Min : 5 / Max : 138	
Maximum lines for calls robots	<input type="text" value="5"/>	Min : 3 / Max : 48	
Maximum activated outbound campaigns	<input type="text" value="3"/>	Min : 3 / Max : 397	
Maximum queues	<input type="text" value="10"/>	Min : 7 / Max : 278	
Maximum connected agents	<input type="text" value="250"/>	747 licenses allocated on 250 available	
Maximum connected agents on chat campaigns	<input type="text" value="5"/>	235 licenses allocated on 250 available	
Maximum connected agents on emails campaigns	<input type="text" value="5"/>	235 licenses allocated on 250 available	
Maximum connected agents on fax campaigns	<input type="text" value="5"/>	208 licenses allocated on 250 available	
Maximum connected agents on social network campaigns	<input type="text" value="5"/>	235 licenses allocated on 250 available	
Maximum connected administrators	<input type="text" value="5"/>	<input type="checkbox"/> No limitation	

3.2.3 Components tab

Under "Components", we can modify the following elements:

-ACD Server: Change the ACD server access.

GENERAL	LICENSE	COMPONENTS	DATABASE	
AFFECTATION				
Supervision	Component affected in other company		Reporting	Component affected in other company
Media Server	Component affected in other company		VMC	Component affected in other company
Desktop Sharing Server	Component affected in other company		Flash Server	Component affected in other company
CRM	Component affected in other company			
Acd server	<input type="text" value="ACDServerAccess"/>			
* If you change Acd Server sound and ivr files are not moved.				
SCRIPTER				
Scripter	Component affected in other company			
Database Manager	Component affected in other company			

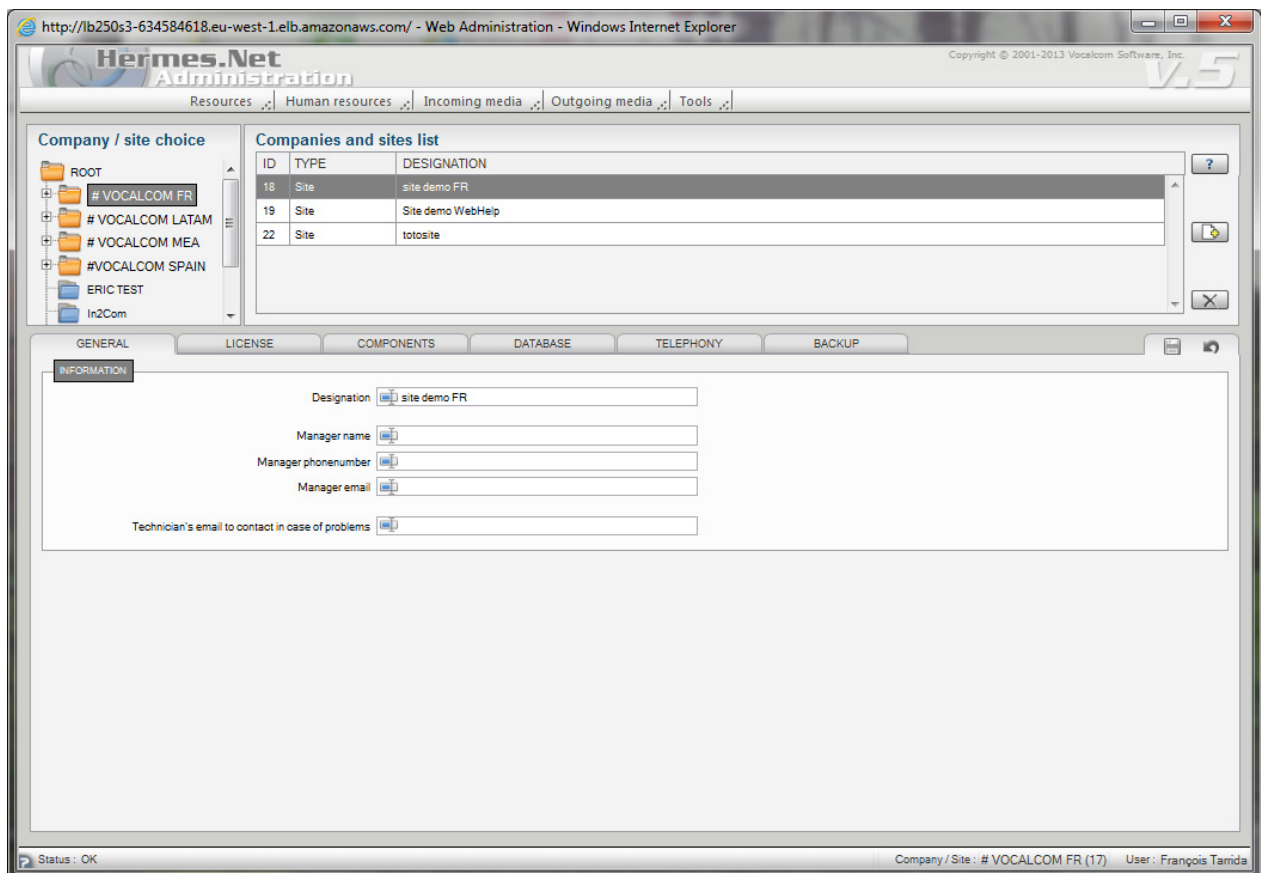
3.2.4 Database tab

Under "Database", we can modify the following elements: Connections to databases.

GENERAL	LICENSE	COMPONENTS	DATABASE
AVAILABLE CONNECTIONS			
Component connection affected in other company			

3.3 Site Management in ROOT

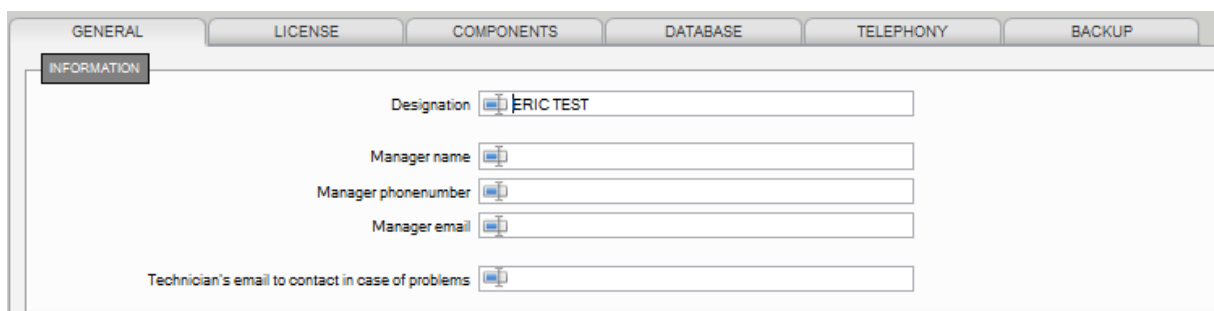
Rather than "Companies/Sites". under "Companies and sites list", several tabs will allow us to modify the Company level.



3.3.1 General tab

Under "General", we can modify the following elements:

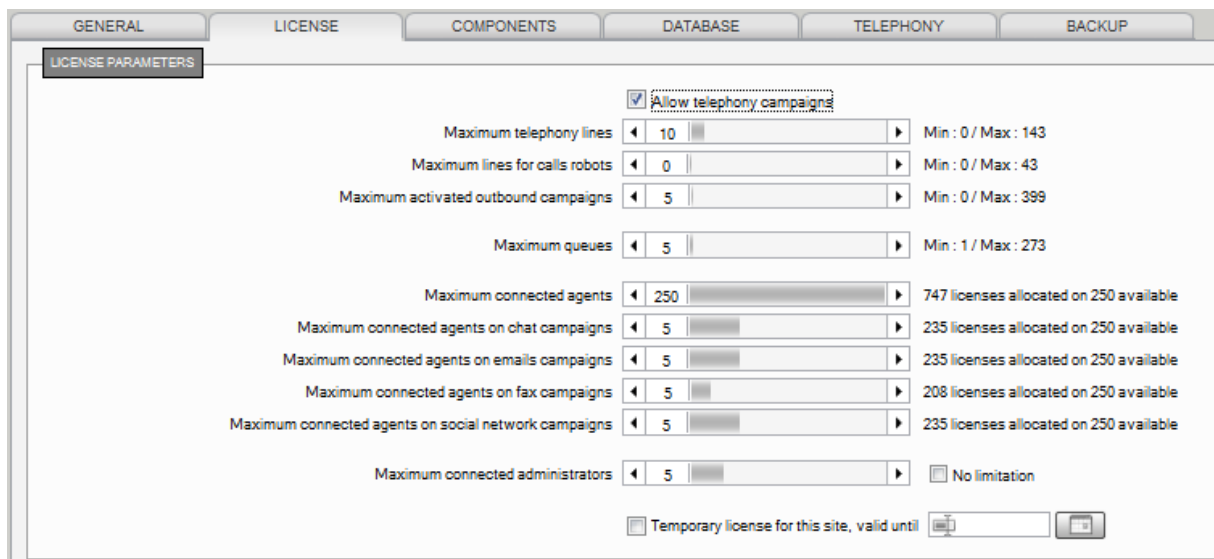
- Designation** of the company
- Manager** details
- IT technician** email address



3.3.2 License tab

Under "License", we can modify the following elements:

- are telephony campaigns **allowed** on the site?
- Maximum** lines
- Maximum** campaigns and queues
- Maximum** connected agents for each media
- Maximum** connected administrators



LICENSE PARAMETERS

Allow telephony campaigns

Maximum telephony lines: 10 (Min: 0 / Max: 143)

Maximum lines for calls robots: 0 (Min: 0 / Max: 43)

Maximum activated outbound campaigns: 5 (Min: 0 / Max: 399)

Maximum queues: 5 (Min: 1 / Max: 273)

Maximum connected agents: 250 (747 licenses allocated on 250 available)

Maximum connected agents on chat campaigns: 5 (235 licenses allocated on 250 available)

Maximum connected agents on emails campaigns: 5 (235 licenses allocated on 250 available)

Maximum connected agents on fax campaigns: 5 (208 licenses allocated on 250 available)

Maximum connected agents on social network campaigns: 5 (235 licenses allocated on 250 available)

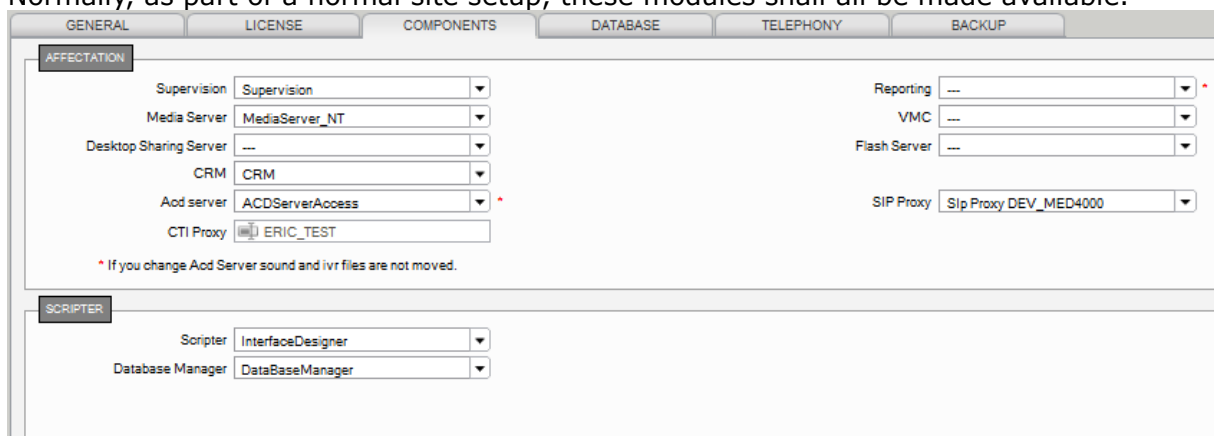
Maximum connected administrators: 5 (No limitation)

Temporary license for this site, valid until:

3.3.3 Components tab

Under "Components", we can modify the following elements:

-All the **modules**, part of the Hermes platform, which have been enabled for this site. Normally, as part of a normal site setup, these modules shall all be made available.



COMPONENTS

AFFECTATION

Supervision: Supervision

Media Server: MediaServer_NT

Desktop Sharing Server: ---

CRM: CRM

Aod server: ACDServerAccess

CTI Proxy: ERIC_TEST

Reporting: ---

VMC: ---

Flash Server: ---

SIP Proxy: Sip Proxy DEV_MED4000

* If you change Aod Server sound and ivr files are not moved.

SCRIPTER

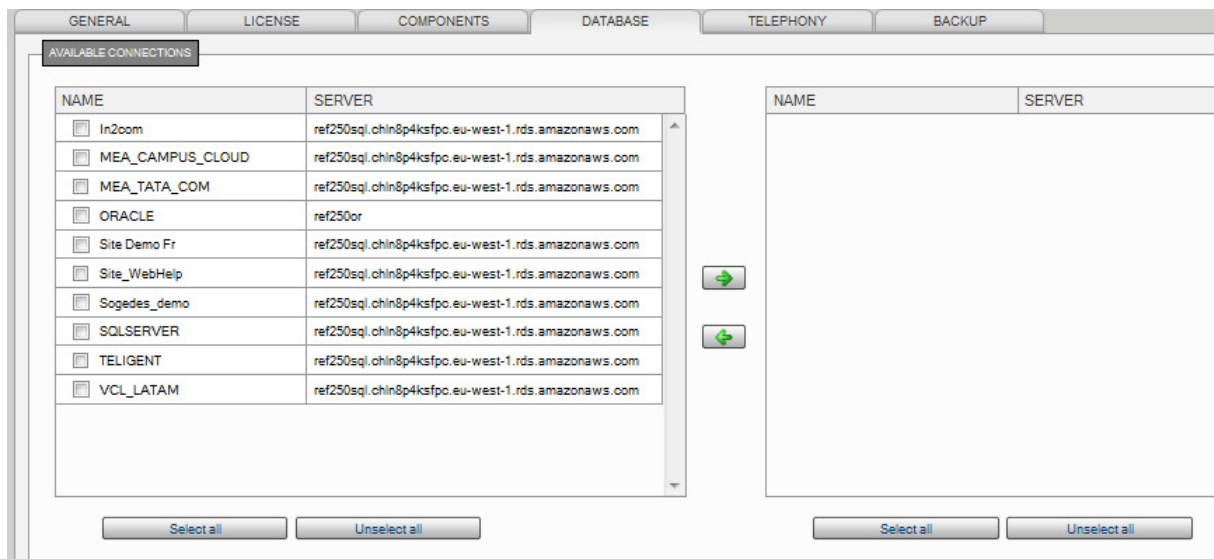
Scripter: InterfaceDesigner

Database Manager: DataBaseManager

3.3.4 Database tab

Under "Database", we can modify the following elements:

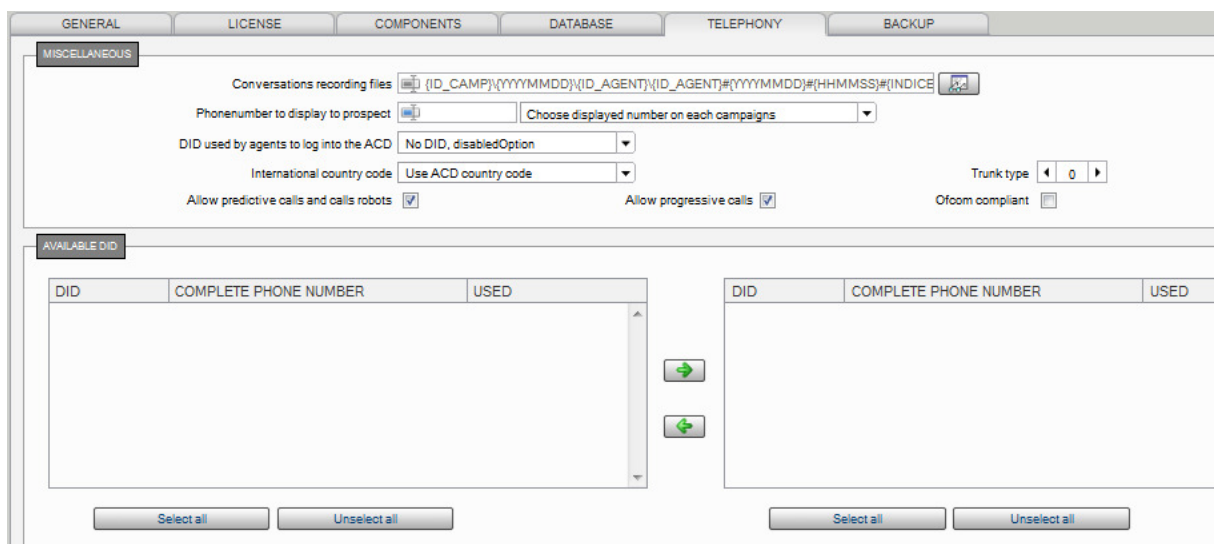
-Available databases (on the left)
 -Databases dedicated to the site (on the right). Add/delete with the arrow buttons.



3.3.5 Telephony tab

Under "Telephony", we can modify the following elements:

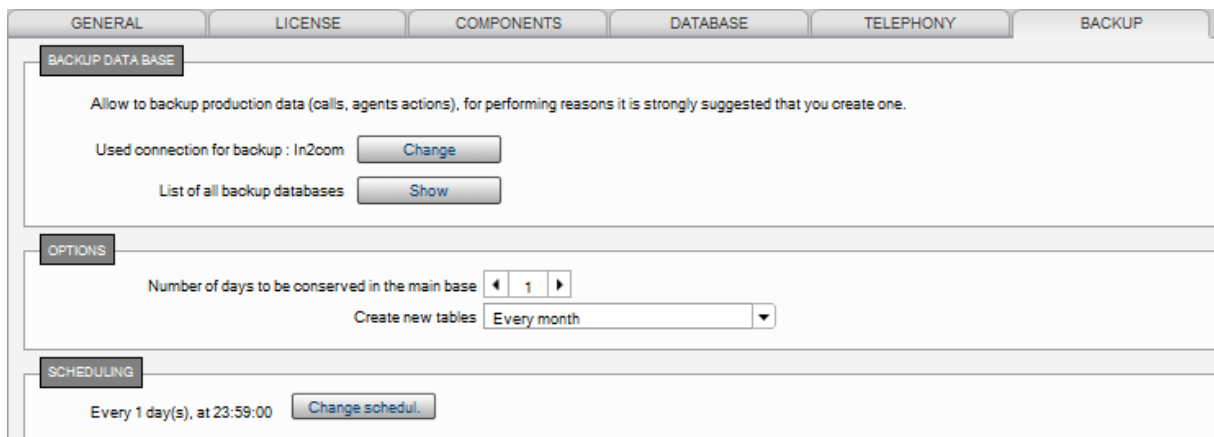
- Name format** for the conversation recordings
- Phone number** to display for the site
- How do the agents connect into the **ACD**
- Predictive and progressive** calling allowed or not
- Ofcom** compliancy rules for such countries (ex. UK)
- Available DID numbers (on the left)
- DID numbers dedicated to the site (on the right). Add/delete with the arrow buttons.



3.3.6 Backup tab

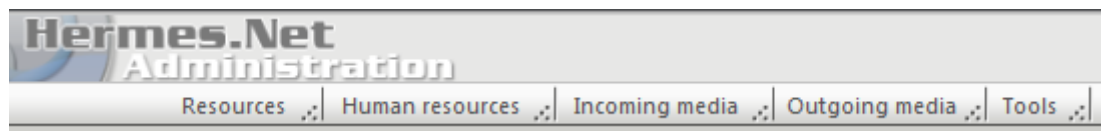
Under "Backup", we can modify the following elements:

- designation** of a backup database
- options** of said backup (structure, scheduling)



3.4 Top menus

At the top of the screen, this area consists of menus representing the major ROOT/site elements and listing all sub-functionalities:





3.4.1 Resources


This menu is only available at the ROOT level. Here, the ROOT admin is able to work on elements which will define production sites.

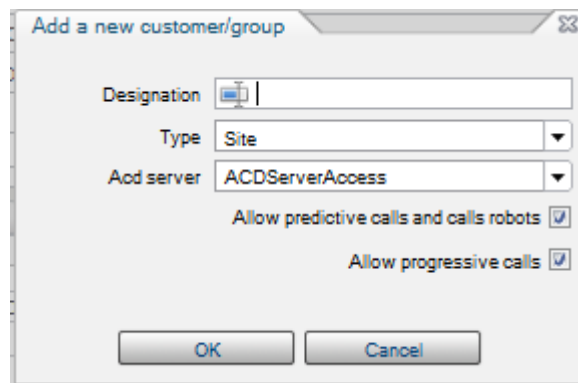


3.4.1.1 Companies/Sites

The **Company/sites** option gives access to managing companies and sites defined in the system (ROOT level).



With the  and  buttons you can add or delete one of the elements that belong to the active company.


By clicking on the  button, the following dialog box is displayed:



3.4.1.2 Components

The **Components** option gives access to managing companies and sites defined in the system (ROOT level).

With the  and  buttons you can add or delete one component.



With the  button you can test an existing component.

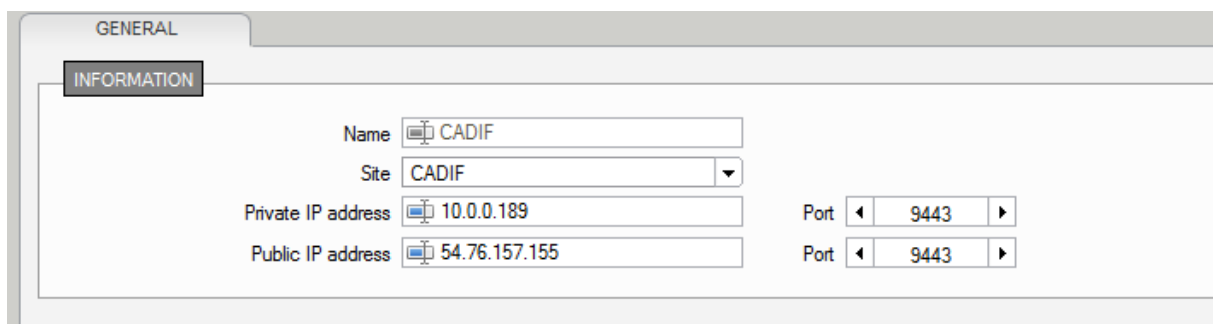
With the ACD Server Access, you also get information on your running ONNET server.



3.4.1.3 Proxy CTI



The **Proxy CTI** menu gives access to proxies being run on the platform.

With the  and  buttons you can add or delete one proxy.



3.4.1.4 Connections

The **Connections** menu gives access to the SQL and Oracle databases created on the server.

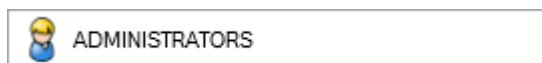
With the  and  buttons you can add or delete one database.

INFORMATION

Designation	<input type="text" value="CADIF"/>
Server type	<input type="text" value="SQLSERVER"/>
Description	<input type="text" value="CADIF"/>
Server name	<input type="text" value="ref250sql.chln8p4ksfpc.eu-west-1.rds.amazonaws.com"/>
Base	<input type="text" value="CADIF_POC"/>
User	<input type="text" value="sacadif"/>
Password	<input type="password" value="*****"/>

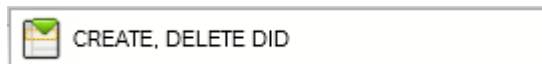
3.4.2 Human Resources

See section 2.5 for more information on administrators and account creation.





3.4.3 Incoming Media


This screen allows creating the DID (Direct Inward dialling) used in defining a site's telephony parameters. Once assigned to a specific site, a DID appears with the **Yes** sign in the **Affected** column of the **DID List**.




With the  and  buttons DID can be added or deleted.

ADDING A DID: With the  and  buttons DID can be added or deleted.

Enter the values for the **start range** and **end range**. Enter the same value for start and end range for a DID composed of a single number. (this value is proposed as default). The list **Assign to** allows selecting the site that will be reserved for this DID. This means that future creation of an inbound campaign into this specific site will propose only this reserved DID. Click on  to create the element, or on  to close the window and cancel the creation.

DELETING A DID: Select the element to be deleted from the list on the right and click on the  button to display the following dialog box:

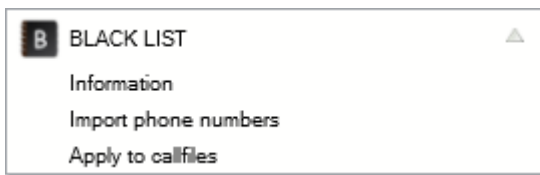
The values for "start range" and "end range" are displayed here to make sure it is this range you wish to remove.

Click on the  button to confirm deletion.

3.4.4 Outgoing Media

Here, the root admin can setup a blacklist for the sites, and import telephone numbers in it, for example from a CSV/Excel file. With that functionality on, black listed numbers

appearing in call files won't be ringed again and will be automatically qualified as **101 – do not call back (blacklisted)**.

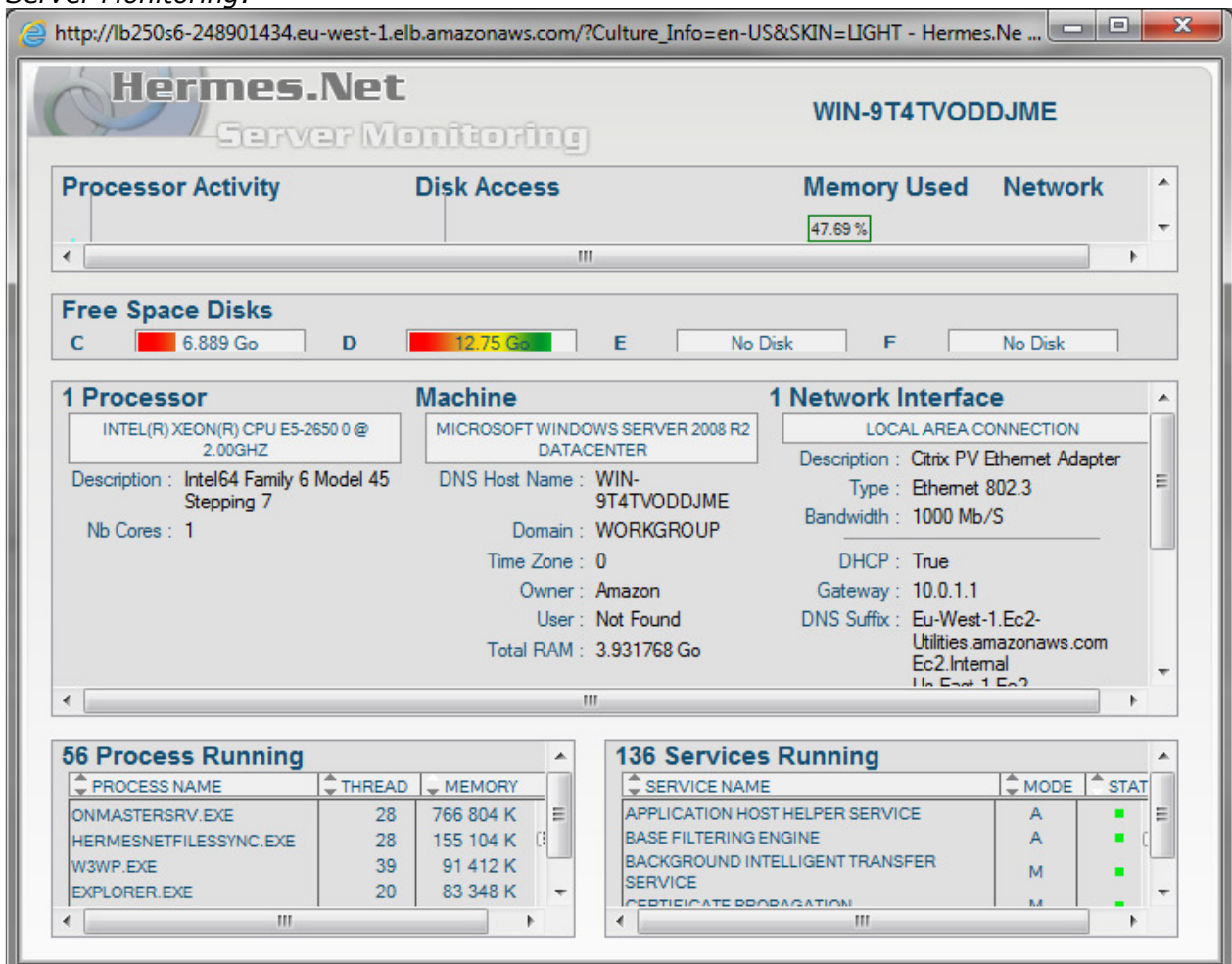


3.4.5 Tools

At the Root level, TOOLS allows the admin to check server activity, using a wizard not too dissimilar from Windows Task management, and also get a quick peak on what licenses are active on the platform.



Server Monitoring:



Hermes.Net Server Monitoring

WIN-9T4TVODDJME

Processor Activity Disk Access Memory Used **47.69 %** Network

Free Space Disks

C	6.889 Go	D	12.75 Go	E	No Disk	F	No Disk
---	----------	---	----------	---	---------	---	---------

1 Processor
INTEL(R) XEON(R) CPU E5-2650 0 @ 2.00GHZ
Description : Intel64 Family 6 Model 45 Stepping 7
Nb Cores : 1

Machine
MICROSOFT WINDOWS SERVER 2008 R2 DATACENTER
DNS Host Name : WIN-9T4TVODDJME
Domain : WORKGROUP
Time Zone : 0
Owner : Amazon
User : Not Found
Total RAM : 3.931768 Go

1 Network Interface
LOCAL AREA CONNECTION
Description : Citrix PV Ethernet Adapter
Type : Ethernet 802.3
Bandwidth : 1000 Mb/S
DHCP : True
Gateway : 10.0.1.1
DNS Suffix : Eu-West-1.Ec2-Utilities.amazonaws.com
Ec2.Internal
lb-5001-1-Ec2


56 Process Running

PROCESS NAME	THREAD	MEMORY
ONMASTERSRV.EXE	28	766 804 K
HERMESNETFILES SYNC.EXE	28	155 104 K
W3WP.EXE	39	91 412 K
EXPLORER.EXE	20	83 348 K

136 Services Running

SERVICE NAME	MODE	STAT
APPLICATION HOST HELPER SERVICE	A	■
BASE FILTERING ENGINE	A	■
BACKGROUND INTELLIGENT TRANSFER SERVICE	M	■
CERTIFICATE PROPAGATION	M	■

About :



Hermes .Net V5

e-Business & Contacts center Solutions

Version	: 5.0.0 - Build 014051
License owner	: VOCALCOM
Your contact	: VOCALCOM (support@vocalcom.com)
Expiration date	: Never expired
License information :	
Maximum lines for telephony	: 375
Inbound campaigns	: enabled
Outbound campaigns	: enabled
Email campaigns	: enabled
Web campaigns	: enabled
The Link campaigns	: enabled
Calls robot configuration	: enabled (max. lines : 100)
Cloud Call Recorder (Secured archiving service)	: enabled
Planning management	: enabled
Maximum number of connected administrators	: 50 (used : 2)
Max. connected agents	: 250 (used : 2)
Max. connected agents (Emails campaigns)	: 250 (used : 0)
Max. connected agents (Web campaigns)	: 250 (used : 0)
Max. connected agents (Fax campaigns)	: 250 (used : 0)
Max. connected agents (Social network campaigns)	: 250 (used : 0)
Maximum CTI proxys	: 50 (used : 13)

4. SITE Administration

Site Administration focuses entirely on production aspects of a working site – therefore in here we will create agents and salesmen, increment our inbound and outbound campaigns, etc...

Site

V5_250 ▼

WORKSPACE

SUPERVISION

ADMINISTRATION


SCRIPTING


REPORTING


AGENDA


Administration Wizards


Human Resources ▼





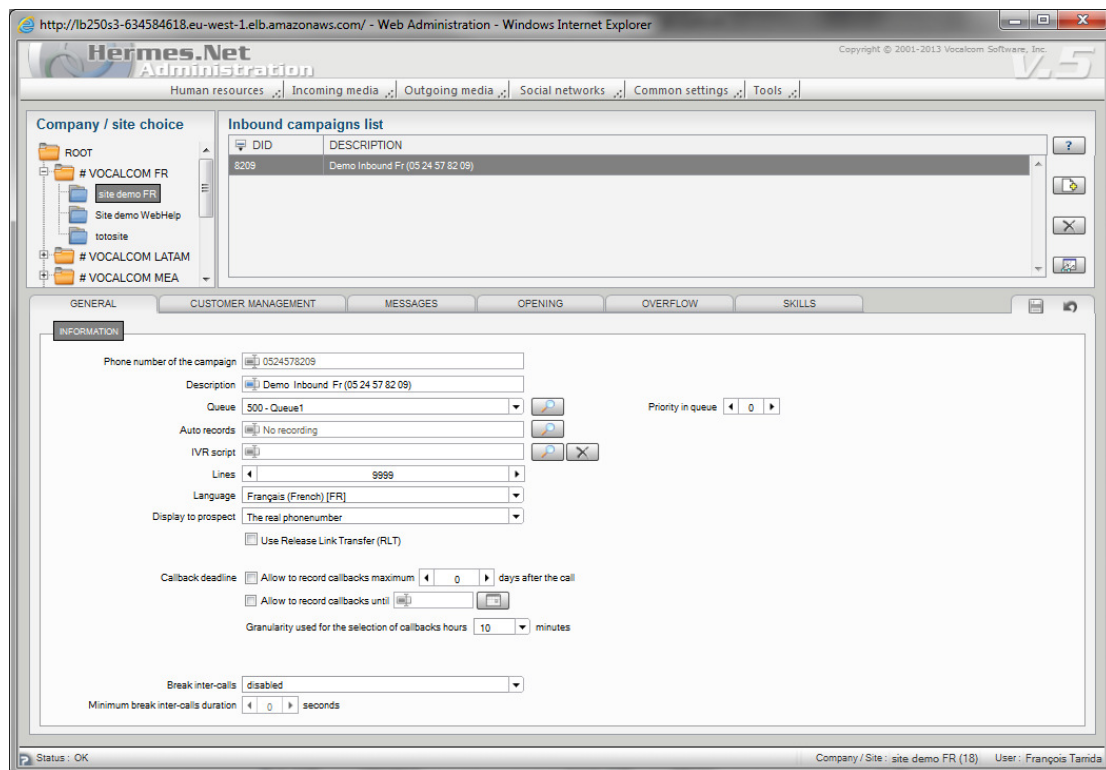
LAUNCH THE SELECTED WIZARD 

TAXATION REPORTS 

LAUNCH ADMINISTRATION 

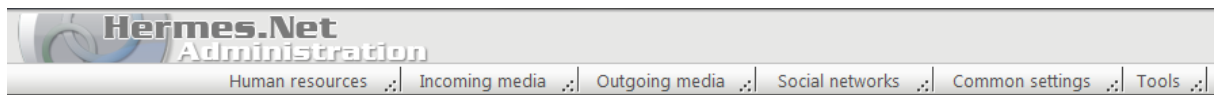
4.1 Difference with the Root Admin account

A Site Admin can only work on his site, and aspects of his site, while a Root admin has a global view of the Hermes platform.



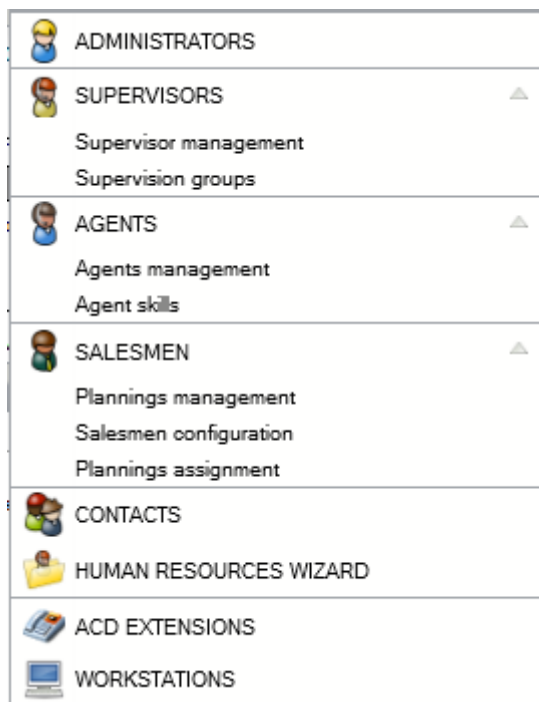
4.2 Top menus

At the top of the screen, this area consists of menus representing the major site elements and listing all sub-functionalities – notice that the “Resources” menu from ROOT is absent, and other menus have been added:



4.3 Human Resources

In this section, administrators are able to manage the site’s Human Resources. Obviously, at the ROOT level, the menu will only display Administrator accounts management. At the site level, the full menu is available, as pictured below:



4.3.1 Administrators

See section 2.5 for more information on administrators and account creation.

4.3.2 Supervisors

In this menu, we will create Supervisor accounts and supervision groups.




-Supervisors: team leaders charged with managing the agents, they are able to use the Supervision, Reporting and Agent module, if allowed to do so.

-*General:* general information on the account.




-*Programs:* Agent workspace used if needed, reporting access or not.

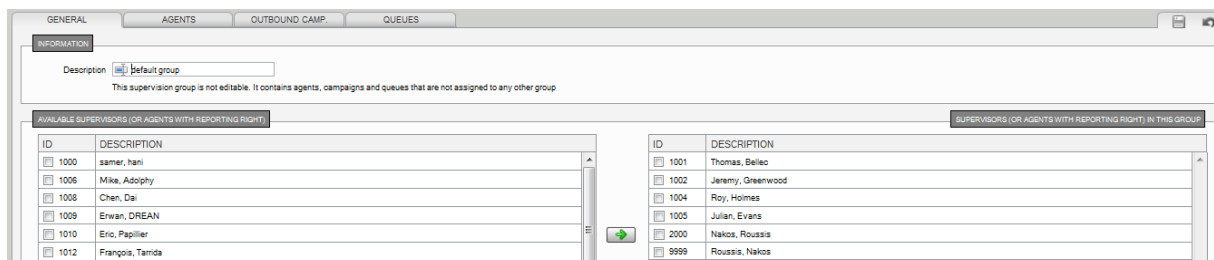
-*Rights:* Telephony and supervisor rights in Supervision.

-*Supervision groups:* groups added to account. See next topic.

With the  and  buttons DID can be added or deleted. Save changes with the  button.

-Supervision groups: These are filters we can add to supervisor accounts, to allow them to quickly see what agents and campaigns they need to focus on. There is a "Default" group, in which all agents and all campaigns are available.

With the  and  buttons DID can be added or deleted. Save changes with the  button.



PLEASE NOTE – Creating groups gradually depletes what’s visible in the default group, so use groups appropriately.

4.3.3 Agents

In this menu, we will create Supervisor accounts and agent skills.

-Agents: Agents are in charge of running the campaigns, they are able to use the Agent module, and we can “bump” them to Supervisor level. Remember, Agents and Supervisors use the same kind of license.




-*General:* general information and global rights of the account.

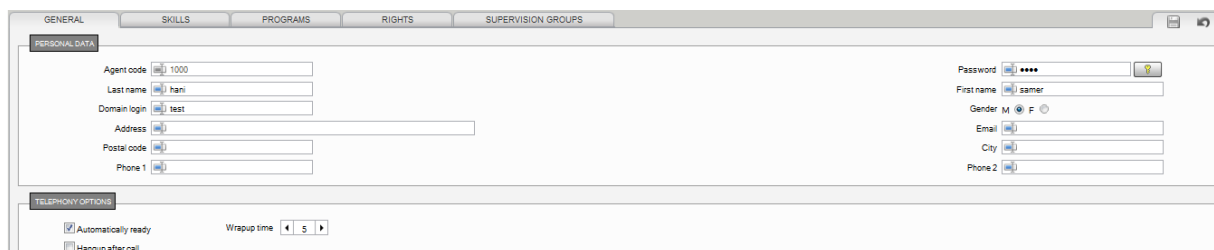
-*Skills:* skillsets added to agent account, what is his level.

-*Programs:* Agent workspace used if needed, reporting access or not.

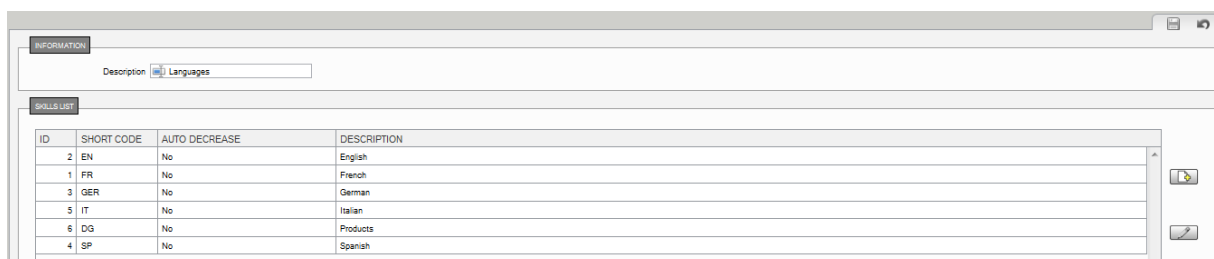
-*Rights:* Telephony and supervisor rights (if Supervisor).

-*Supervision groups:* groups added to account (if Supervisor).

With the  and  buttons DID can be added or deleted. Save changes with the  button.



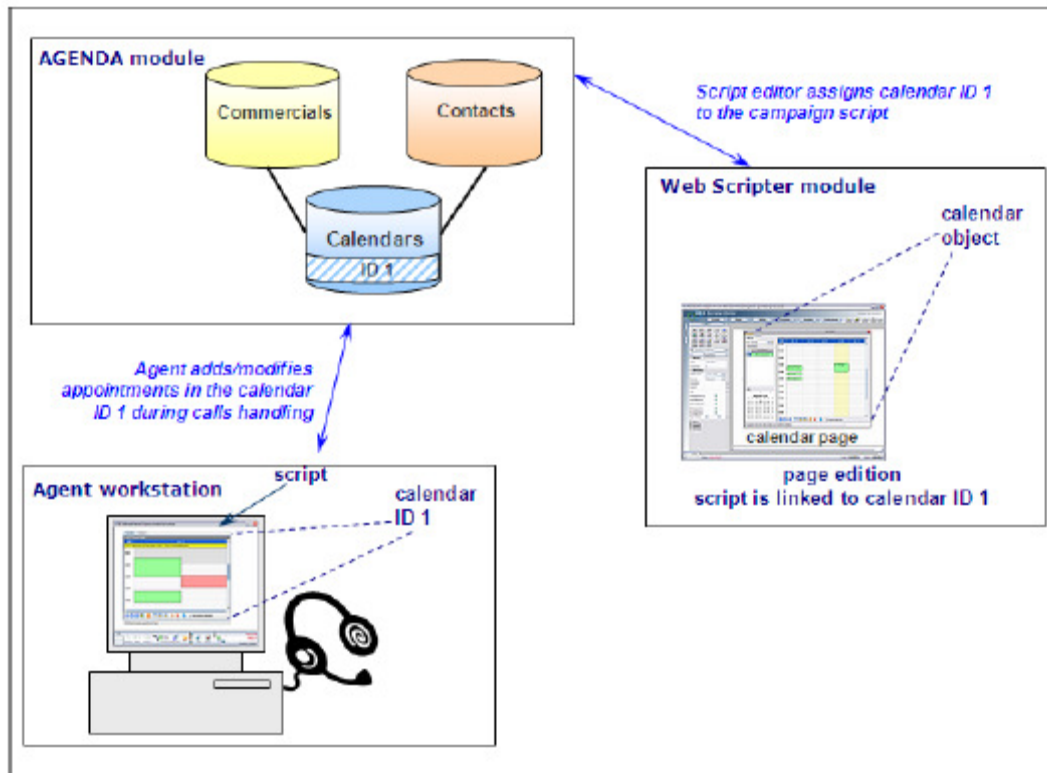
-Agent Skills: We can create skillsets, which allows the system to route or select a specific profile of agent for a given type of call, for example language proficiency, area codes, etc... Skills can be used inbound with an IVR scenario, or outbound with distribution rules. If **autodecrease** is on, the software will look for the next best level available if your best agent is not available. Levels rank from 0(none) to 9 (best).






Example of skillset added to an agent:

4.3.4 Salesmen

In this menu, we will create Salesmen accounts, appointment schedules for them, and set up area rules. This is directly linked to the “agenda” object in script design.



With the  and  buttons DID can be added or deleted. Save changes with the  button.

-Plannings list: Here we create appointment plannings for our salesmen.

- General:* standard week and available time slots.
- Appointment type:* if needed, timeframes for various appointments.
- Appointment place:* if needed, specific locations for various appointments.
- Agent Rights:* rights of campaign agents on appointments.

-Salesmen Configuration: Here we setup the salesmen accounts.

-General: creating the account, color code them, set them as active or not.




-Assignment and areas: assign planning, setup an area (which needs to be specified on the Agenda object in script as well).

-Plannings assignment: Same as the second tab in “Salesmen configuration”.

NOTE: Salesmen and appointments will be explained in full detail in a future document.

4.3.5 Contacts/Human Resources Wizard

In this menu, we will create Contacts lists, which we can then add to the agent’s workspaces, allowing them to call/email those contacts without having to type the numbers or email addresses all the time.

With the  and  buttons DID can be added or deleted. Save changes with the  button.

NAME	PHONE	EMAIL	INFORMATION	INTERNAL CONTACT
Julian Evans	+447881664953	j.evans@vocalcom.com	Sales Account Manager	No
Mike Adolph	+44 7771 322448	m.adolph@vocalcom.com	Mike Adolph, MD UK & Eire	No
Jeremy Greenwood	+447531219723	j.greenwood@vocalcom.com	Pressales	No
Ray Holmes	+447500702259	r.holmes@vocalcom.com	Sales Account Manager	No
Barry Mayhew	+17204547204	b.mayhew@vocalcom.com	Pressales	No

For the “Human Resources Wizard”, please check **Chapter 5** of this document.

4.3.6 ACD Extensions/Workstations

ACD extensions are the abbreviated phone numbers used on the Hermes platform. These extensions are generally used when agents are connected to a PABX or else. Every phone station must be declared in the system in order to be used. By default, Hermes platforms use a **free sitting** configuration.

ACD extensions can be built on:

Free number: allows creating a station using a fix or mobile phone number

SIP station: is used in case of a soft phone application

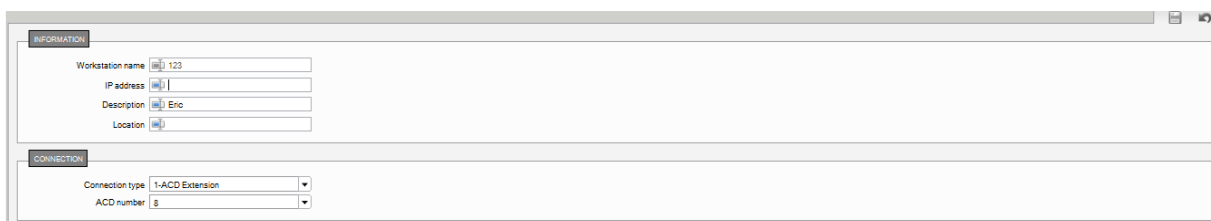
IP Address: no phone, only a pc IP address (compared to "SKYPE")



The screenshot shows a configuration window with the following fields:

- Station name: 1
- Station type: Free number
- Connection mode: The ACD calls the agent
- Station: 015573077
- Trunk type: 0 (with a checked box for 'Used Default Trunk type')
- Description: Hicham

Workstations allow the admins to create **fixed** workstations, meaning an IP address equals a specific ACD extension.

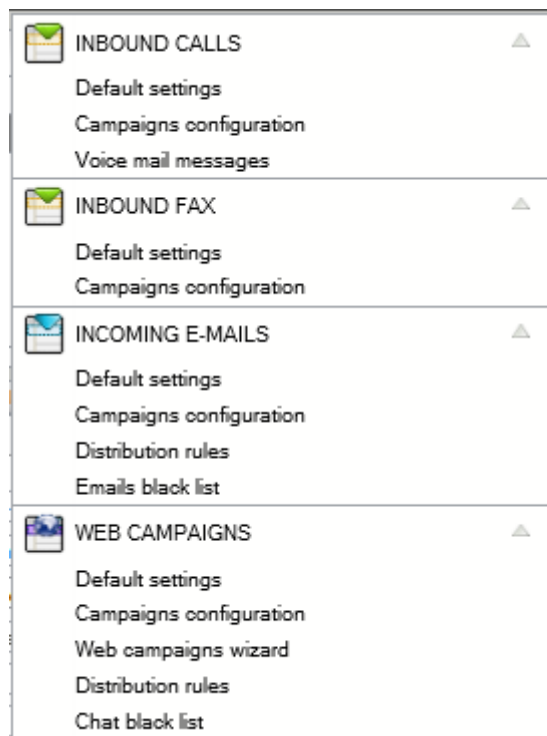



The screenshot shows a configuration window with the following fields:

- Workstation name: 123
- IP address: [empty]
- Description: Eric
- Location: [empty]
- Connection type: 1-ACD Extension
- ACD number: 8

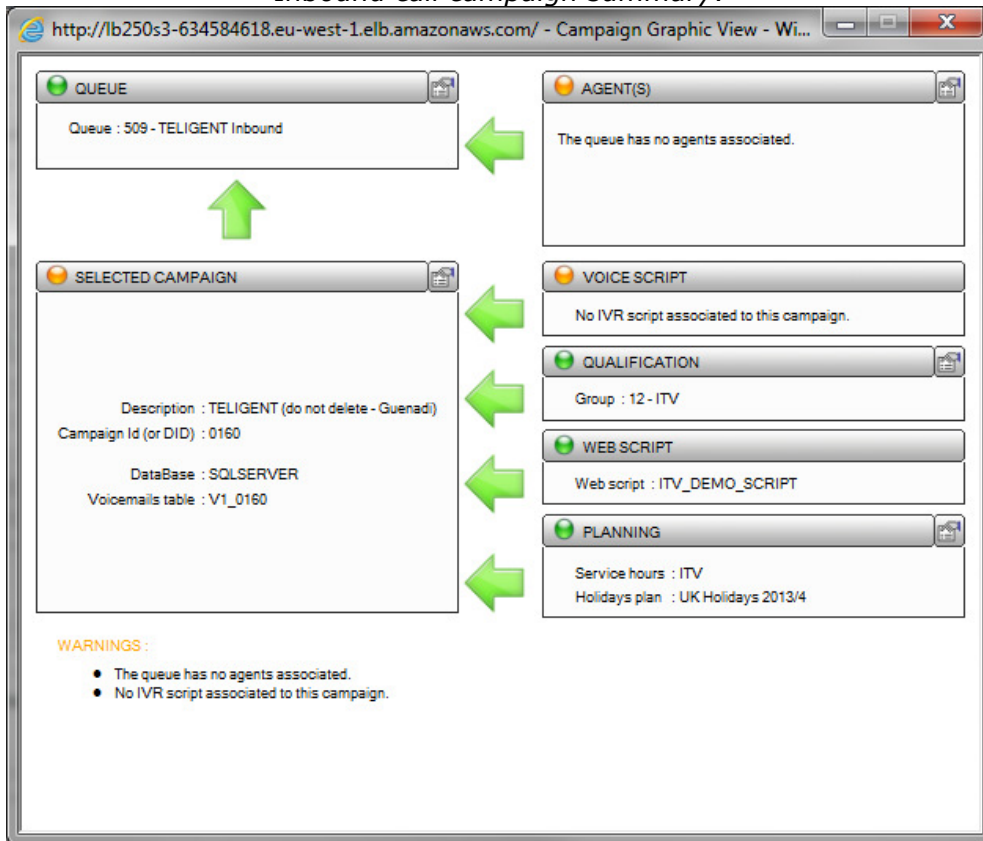
4.4 Incoming media

In this menu, administrators are able to manage all incoming media campaigns, meaning inbound calls, fax, emails and web campaigns (chat). Obviously, it all depends on the options available on the platform. If web campaign licenses have not been bought, the option should be greyed out.



Please note that each campaign can be quickly checked using the "Campaign summary button" .

Inbound call campaign summary:



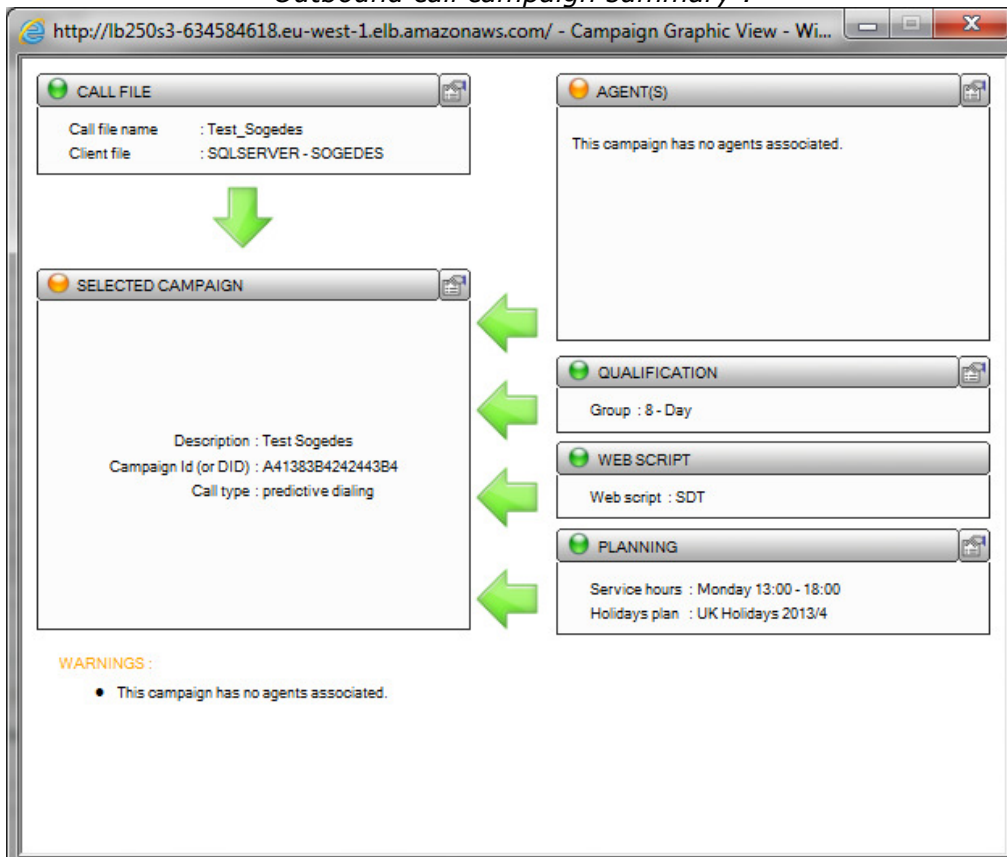
The screenshot shows a web browser window titled "Campaign Graphic View - Wi...". The interface is divided into several sections:

- QUEUE:** Queue : 509 - TELIGENT Inbound. A green arrow points up to this section.
- AGENT(S):** The queue has no agents associated. A green arrow points left to this section.
- SELECTED CAMPAIGN:**
 - Description : TELIGENT (do not delete - Guenadi)
 - Campaign Id (or DID) : 0160
 - DataBase : SQLSERVER
 - Voice-mails table : V1_0160
- VOICE SCRIPT:** No IVR script associated to this campaign. A green arrow points left to this section.
- QUALIFICATION:** Group : 12 - ITV. A green arrow points left to this section.
- WEB SCRIPT:** Web script : ITV_DEMO_SCRIPT. A green arrow points left to this section.
- PLANNING:** Service hours : ITV; Holidays plan : UK Holidays 2013/4. A green arrow points left to this section.

WARNINGS :

- The queue has no agents associated.
- No IVR script associated to this campaign.

Outbound call campaign summary :






The screenshot shows a web browser window titled "Campaign Graphic View - Wi...". The interface is divided into several sections:

- CALL FILE:** Call file name : Test_Sogedes; Client file : SQLSERVER - SOGEDES. A green arrow points down to this section.
- AGENT(S):** This campaign has no agents associated. A green arrow points left to this section.
- SELECTED CAMPAIGN:**
 - Description : Test Sogedes
 - Campaign Id (or DID) : A41383B4242443B4
 - Call type : predictive dialing
- QUALIFICATION:** Group : 8 - Day. A green arrow points left to this section.
- WEB SCRIPT:** Web script : SDT. A green arrow points left to this section.
- PLANNING:** Service hours : Monday 13:00 - 18:00; Holidays plan : UK Holidays 2013/4. A green arrow points left to this section.

WARNINGS :

- This campaign has no agents associated.

The campaign summary allows the admin to quickly check critical elements for the campaign.

-  indicates the element is valid.
-  indicates a warning. The element should be added/corrected, although the campaign will still be valid.
-  indicates a critical error/missing critical element. The campaign won't be valid, for example missing call file for outbound or missing queue for inbound.

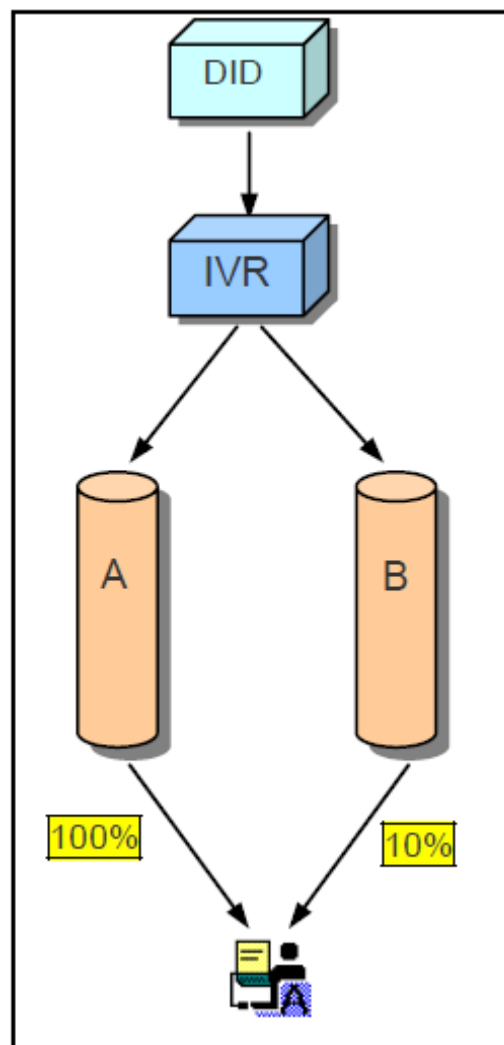
Underneath, the list of **warnings** and **errors** is shown.

Once changes have been made, the color codes correct themselves automatically.

4.4.1 Inbound calls

In this menu, we will create and manage inbound call campaigns.

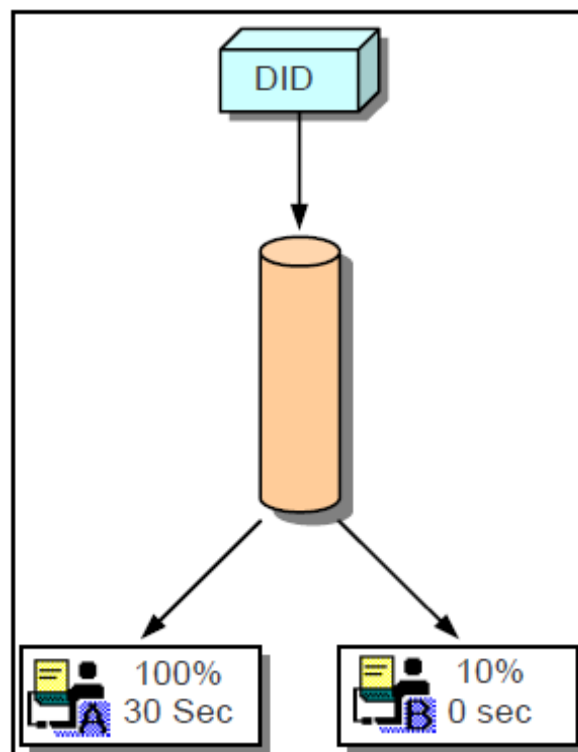
Basically, customers will ring the DID number associated to the campaign (and setup in the ROOT), go through the IVR, and end up in a campaign queue:



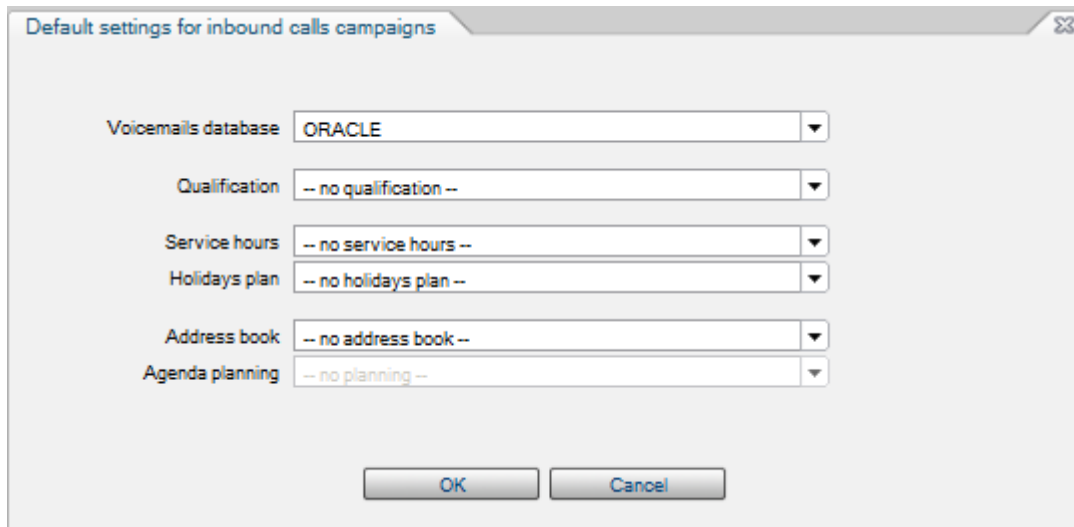
Entry points for incoming calls are entities called campaigns. Campaigns (or IVR scenarios linked to them) select the **queue** in which the call will be put. The queue choice is trivial when not using an IVR scenario: the queue field is taken from the campaign definition. When using an IVR, this default value can be changed and any queue can be chosen dynamically according to IVR-dependant conditions.

Agents can take calls from queues if they have been assigned with skills on that queue. When several agents are available, the agent with most appropriate level is chosen.

The **delay** parameter is also taken into account when selecting the agent. For example, the picture on the left shows a call being queued. Two agents are logged on that queue. Agent A has 100% level and a 30 seconds delay. Agent B has 10% level and no delay. If both agents are ready, B will take the call, as he has no delay. If the delay is removed, agent A would take the call as he has a better level than B. If both agents are ready when a call enters the queue, B will take the call as there is 0 sec delay. In the same situation without any delay, A would take the call.



-Default settings: default settings that can be added to any new inbound campaign, if needed.



- Database*: SQL or Oracle site database used.
- Qualifications*: basic qualification group.
- Service hours/holidays plan*: basic agent schedule and bank holidays list
- Address book/agenda planning*: basic Hermes CRM and appointment agenda.

-Campaigns configuration: here campaigns are created and managed.

- General*: general rules of the campaign.
- Customer management*: web script used, the qualifications, etc.
- Messages*: .WAV messages being played in the campaign.

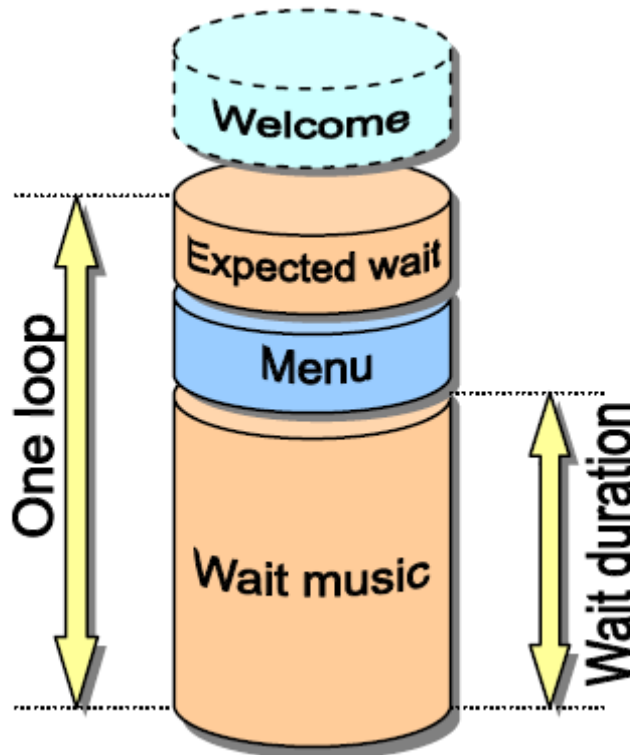
When a call is queued, a sequence of wav file messages is used. This section describes the order of the messages in this sequence. If a particular message is not defined in the system, it is ignored and the sequence goes to the next message.

The first message played is the **Welcome** message. It is played just before entering the queue. It is not considered as part of the loop as it is played only once.

The following messages are considered as part of the loop: **Expected wait** message. It is followed by the **Interactive Menu** message or **IVR scenario**. In last position, the **Wait** message is played.

The Wait duration parameter specifies how long the Wait message must be played. When this time is elapsed, the system goes to the next loop.




The system loops a number of times corresponding to the Wait loops parameter. When the number of loops has been reached, the system goes to overflow mode.



- Opening: plannings and holiday plans used, normal/abnormal closing messages.
- Overflow: overflow strategy used in the campaign.
- Skills: minimum skillsets than are required in the campaign.

-Voicemail messages: voicemail message archive, consultable here and in Supervision. Voicemails are automatically routed to agents when they are available, pretty much like a personal callback.

*.wav	FILE NAME	FILE DATE	FILE DURATION	FILE SIZE

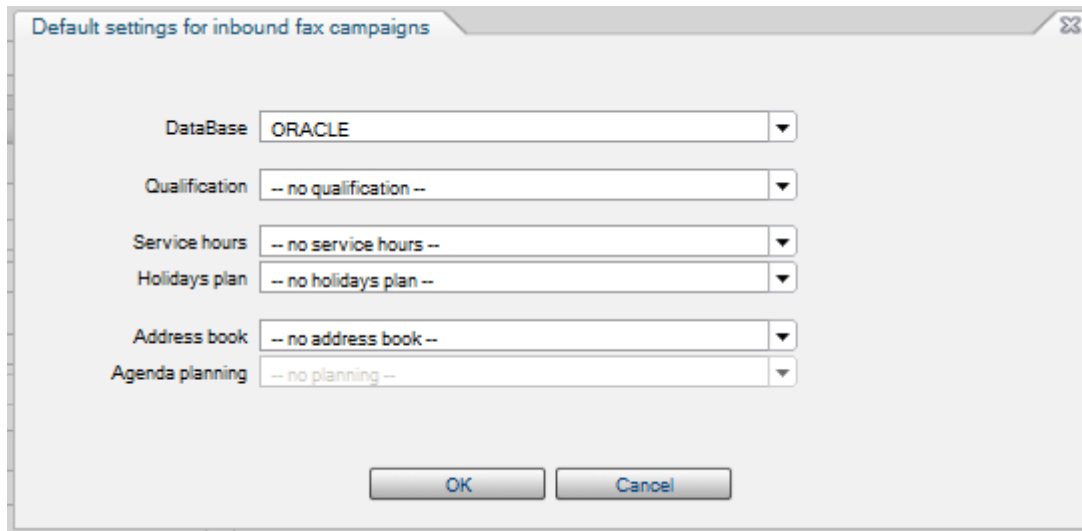
With the  and  buttons campaigns can be added or deleted. Save changes with the  button.

NOTE: Inbound call campaigns will be explained in full detail in a future document.

4.4.2 Inbound fax

In this menu, we will create and manage inbound fax campaigns.

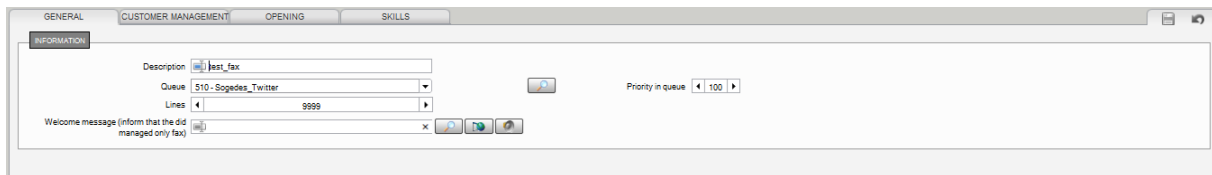
-Default settings: default settings that can be added to any new inbound campaign, if needed.






- Database: SQL or Oracle site database used.
- Qualifications: basic qualification group.
- Service hours/holidays plan: basic agent schedule and bank holidays list
- Address book/agenda planning: basic Hermes CRM and appointment agenda.

-Campaigns configuration: here campaigns are created and managed.

- General: general rules of the campaign.
- Customer management: web script used, the qualifications, etc.
- Opening: plannings and holiday plans used.
- Skills: minimum skillsets than are required in the campaign.



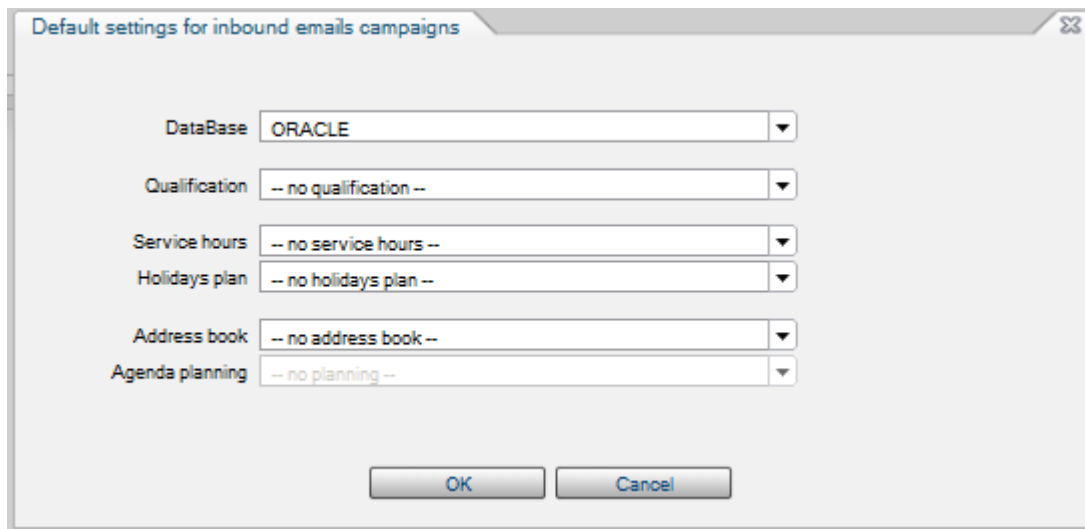
With the  and  buttons campaigns can be added or deleted. Save changes with the  button.

NOTE: Inbound fax campaigns will be explained in full detail in a future document.

4.4.3 Incoming emails

In this menu, we will create and manage inbound email campaigns.

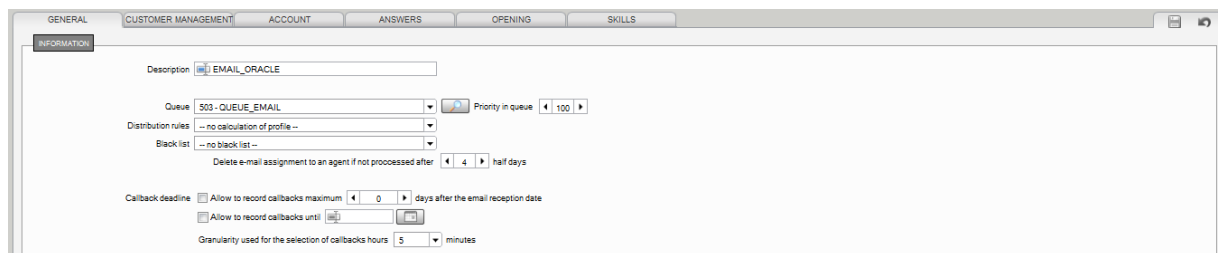
-Default settings: default settings that can be added to any new email campaign, if needed.



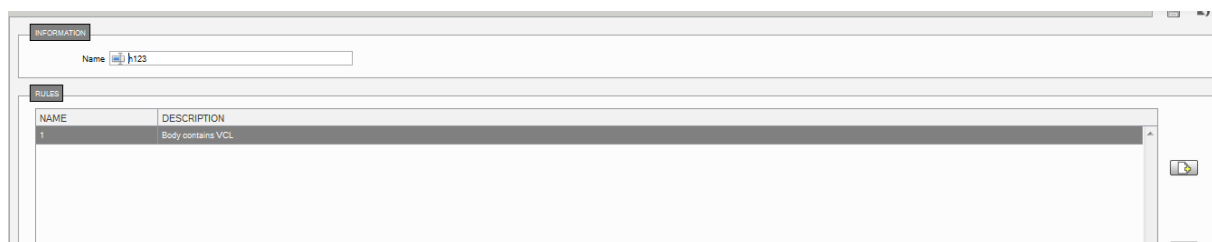
- Database: SQL or Oracle site database used.
- Qualifications: basic qualification group.
- Service hours/holidays plan: basic agent schedule and bank holidays list
- Address book/agenda planning: basic Hermes CRM and appointment agenda.

-Campaigns configuration: here campaigns are created and managed.

- General: general rules of the campaign.
- Customer management: web script used, the qualifications, etc.
- Account: email account linked to the campaign (IMAP, etc...)
- Answers: predefined answers used in the campaign.
- Opening: plannings and holiday plans used.
- Skills: minimum skillsets than are required in the campaign.






-Distribution rules: Allows the use of skillsets in the campaign. Typically, the skill will be linked to a specific element (object of email, word, email address, etc...)



NAME	DESCRIPTION
1	Body contains VCL

-Email blacklist: Allows the blacklisting of words, content, addresses in the campaign.

With the  and  buttons campaigns can be added or deleted. Save changes with the  button.

NOTE: Inbound email campaigns will be explained in full detail in a future document.

4.4.4 Web campaigns

In this menu, we will create and manage inbound web campaigns.

-Default settings: default settings that can be added to any new email campaign, if needed.

-Database: SQL or Oracle site database used.

-Qualifications: basic qualification group.

-Service hours/holidays plan: basic agent schedule and bank holidays list

-Address book/agenda planning: basic Hermes CRM and appointment agenda.

-Campaigns configuration: here campaigns are created and managed.

-General: general rules of the campaign.

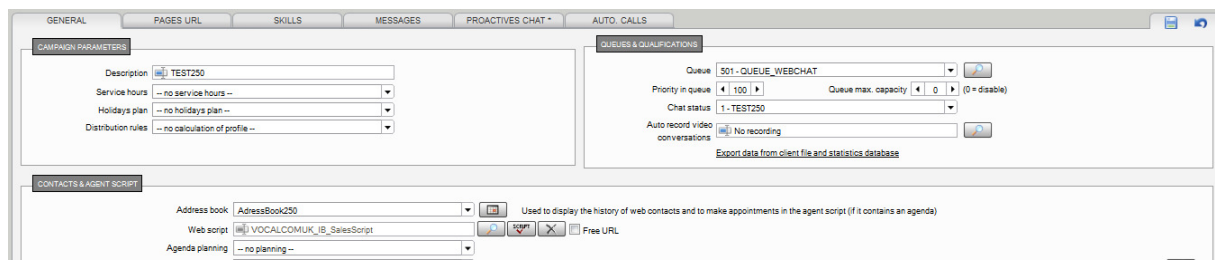
-Pages URL: pages management on which the campaign is active.

-Skills: minimum skillsets than are required in the campaign.

-Messages: predefined messages used in the campaign.

-Proactive chat: rules for proactive chat in campaign.

-Autocalls: rules for autocalls.

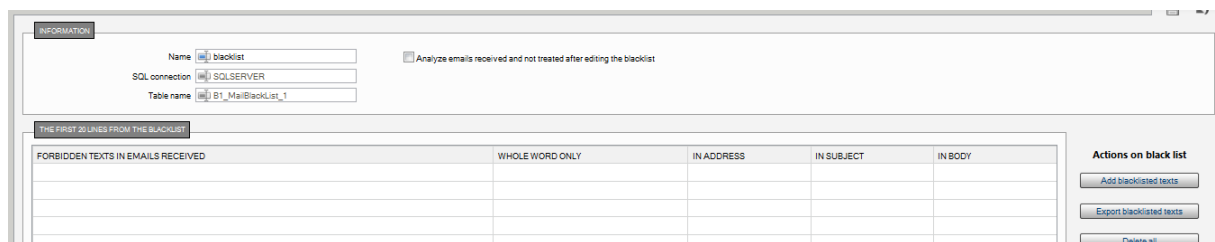





-Web campaign wizard: For the “Web campaign Wizard”, please check **Chapter 5** of this document.

-Distribution rules: Allows the use of skillsets in the campaign. Typically, the skill will be linked to a specific element (object of chat, word, question, etc...).



-Chat blacklist: Allows the blacklisting of words, content in the campaign.

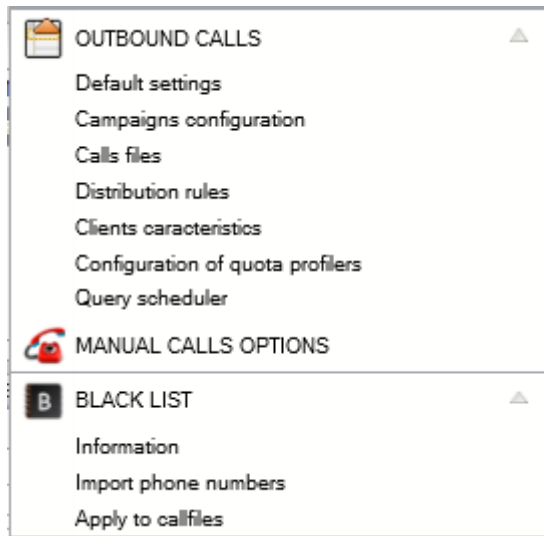



With the  and  buttons campaigns can be added or deleted. Save changes with the  button.

NOTE: Inbound web campaigns will be explained in full detail in a future document.

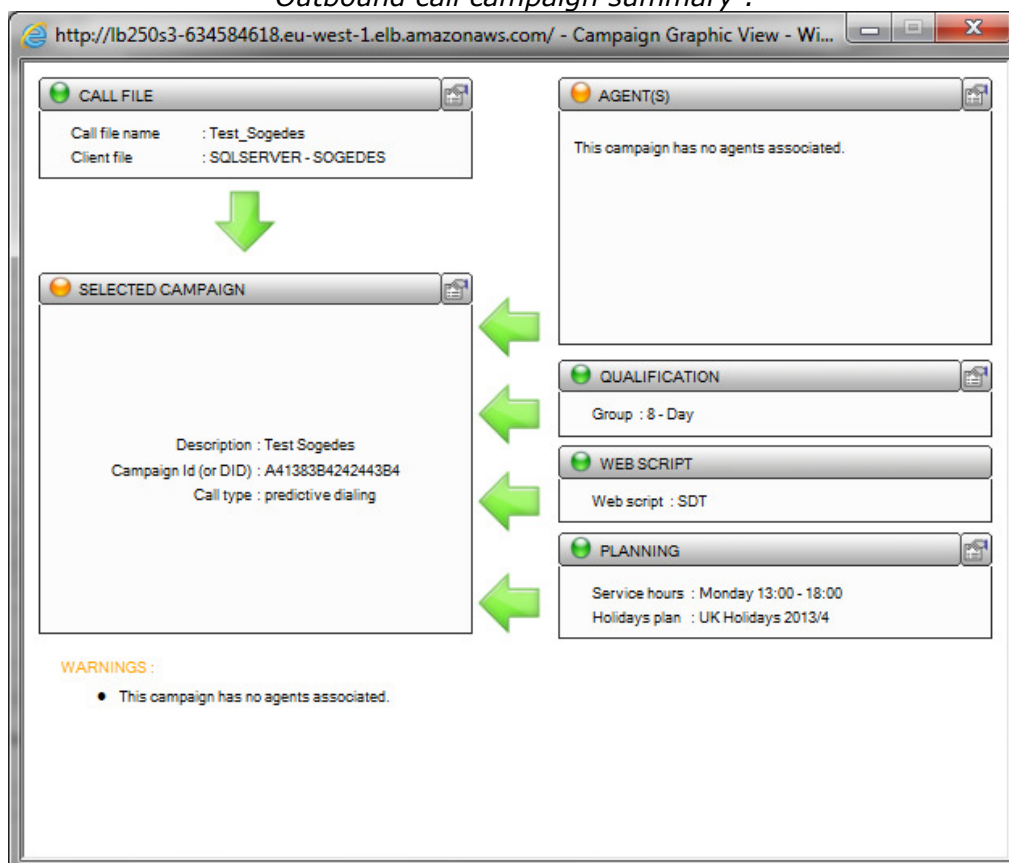
4.5 Outgoing media

In this menu, administrators are able to manage all incoming media campaigns, meaning inbound calls, fax, emails and web campaigns (chat). Obviously, it all depends on the options available on the platform. If web campaign licenses have not been bought, the option should be greyed out.





Please note that each campaign can be quickly checked using the “Campaign summary button” .


Outbound call campaign summary :



The campaign summary allows the admin to quickly check critical elements for the campaign.

 indicates the element is valid.

 indicates a warning. The element should be added/corrected, although the campaign will still be valid.

 indicates a critical error/missing critical element. The campaign won't be valid, for example missing call file for outbound or missing queue for inbound.

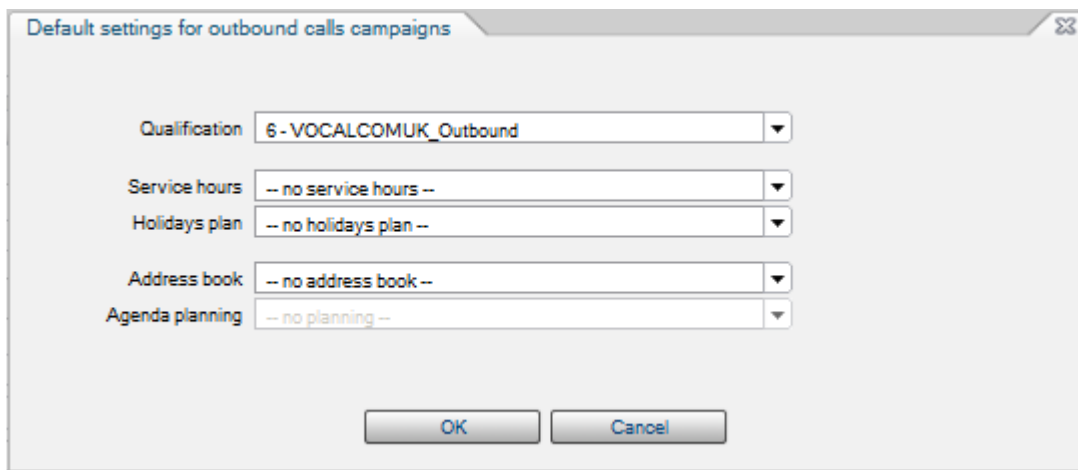
Underneath, the list of **warnings** and **errors** is shown.

Once changes have been made, the color codes correct themselves automatically.

4.5.1 Outbound calls

In this menu, we will create and manage inbound call campaigns.

-Default settings: default settings that can be added to any new outbound campaign, if needed.



-Qualifications: basic qualification group.

-Service hours/holidays plan: basic agent schedule and bank holidays list

-Address book/agenda planning: basic Hermes CRM and appointment agenda.

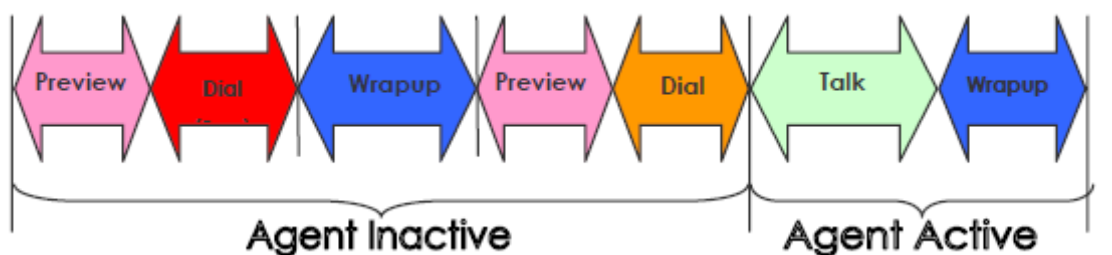
-Campaigns configuration: here campaigns are created and managed.

-General: general rules of the campaign.

-Dialing: dialing rules of the campaign.

4 dialing modes are available, 1 is automated, 3 involve agents:

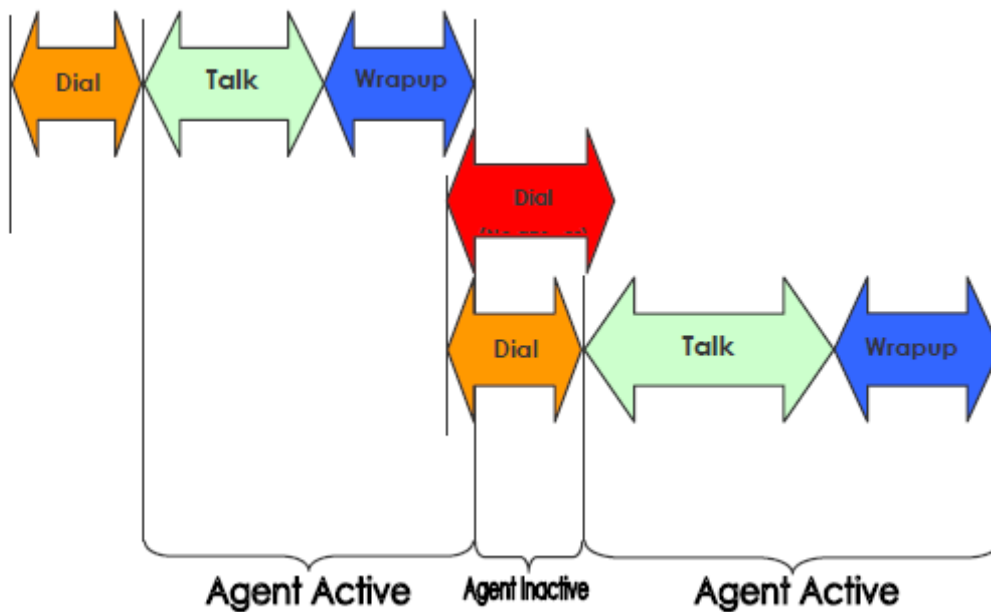
PREVIEW (*agent preview script before call*):



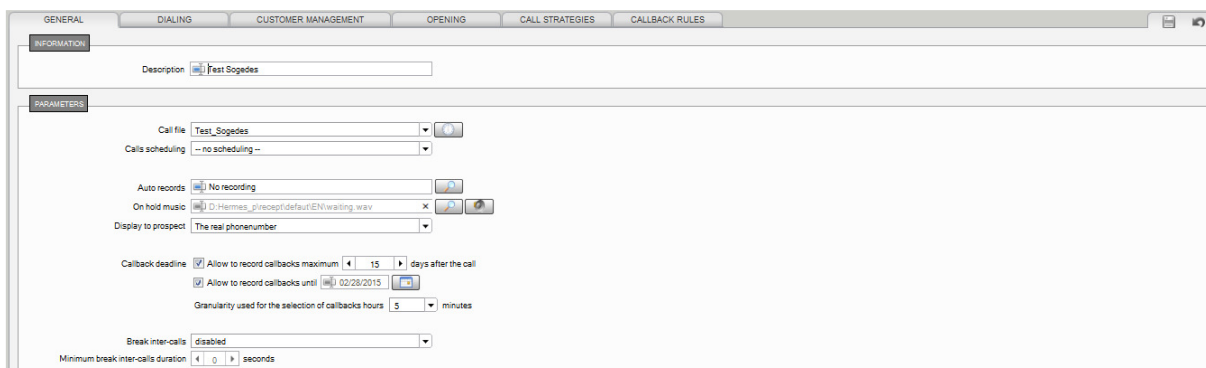
PROGRESSIVE (*automated, record by record*):



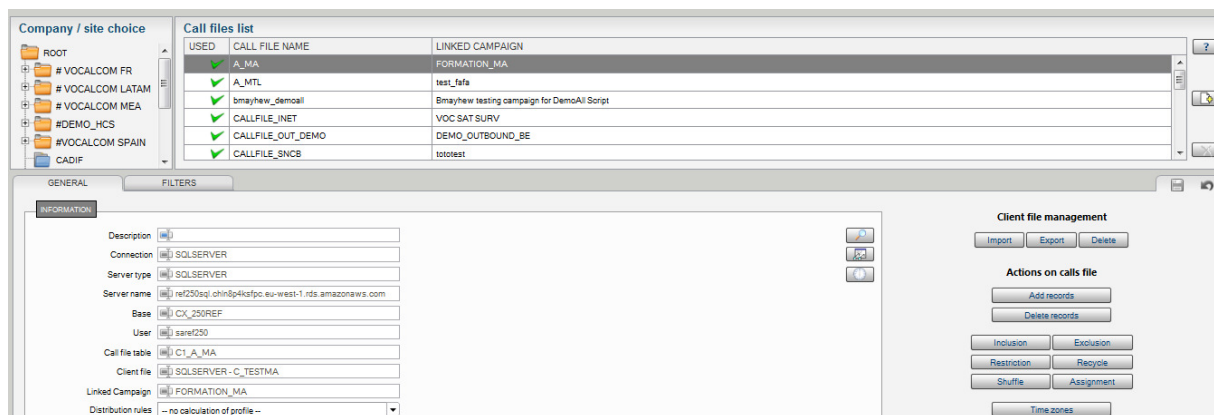
PREDICTIVE (automated, more calls than agent resources available, following abandon rate):



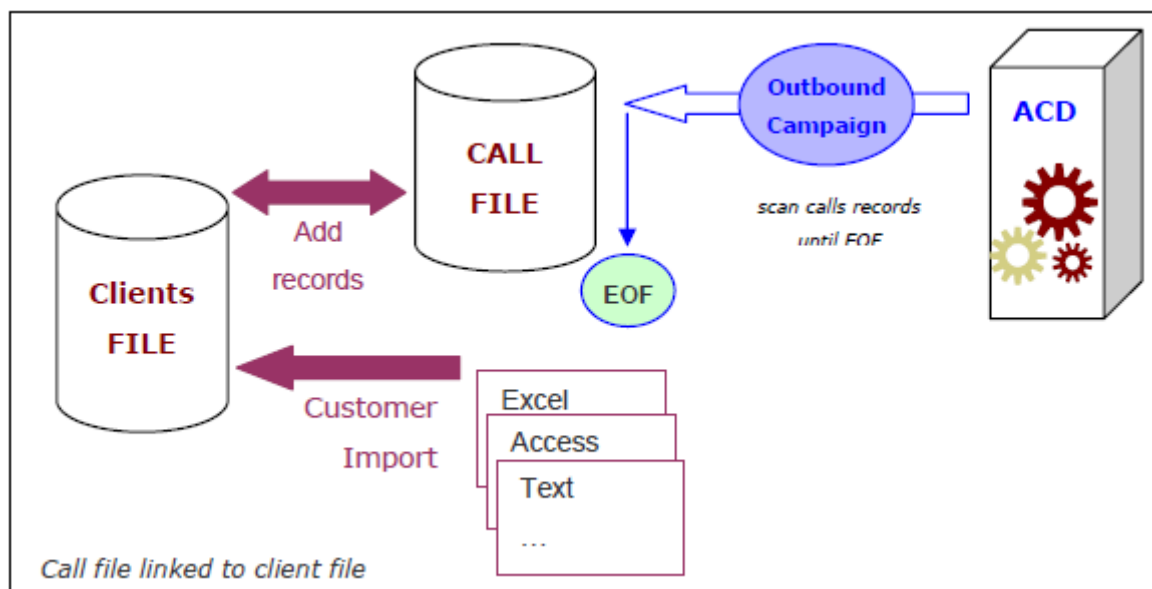
- Customer management: web script used, the qualifications, etc.
- Opening: plannings and holiday plans used, normal/abnormal closing messages.
- Call Strategies: strategies used in call file.
- Callback rules: if no call strategies used, basic callback rules used in campaign.



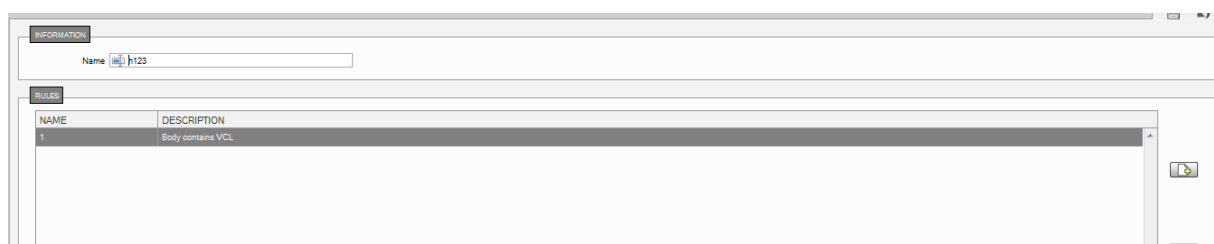
-Callfiles: callfiles management and imports/exports of data.



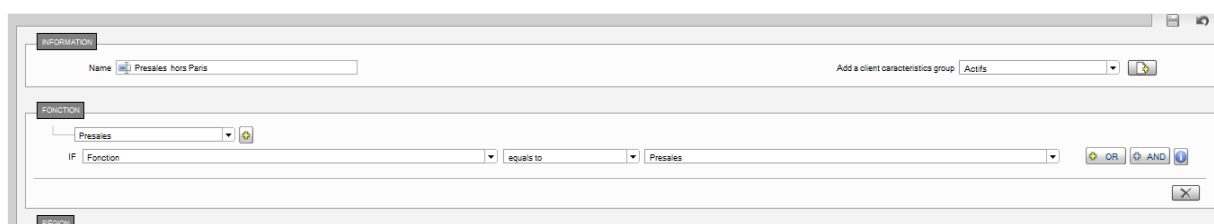
Call files are linked to the client file created in the web script.



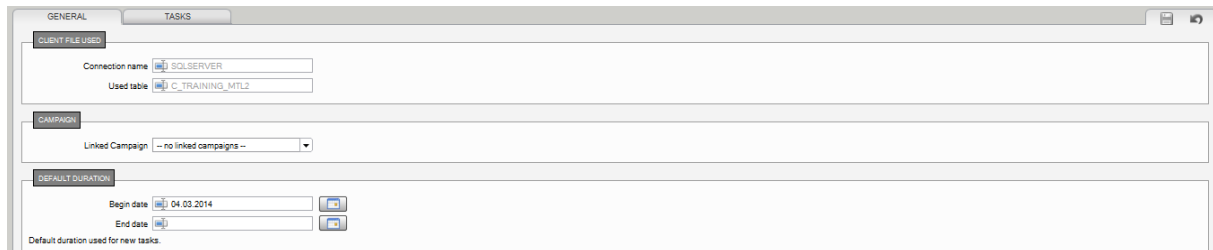
-Distribution rules: Allows the use of skillsets in the campaign. Typically, the skill will be linked to a specific column of the client file (address, zip code, answer, etc...).






-Client characteristics/Quota profilers: Allows the use of quotas in campaigns, via the call qualifications.



-Query scheduler: Allows the automatization of actions on callfiles, as created in call file management.



With the  and  buttons campaigns can be added or deleted. Save changes with the  button.

NOTE: Outbound call campaigns will be explained in full detail in a future document.

4.5.2 Manual call options

Here campaigns are created and managed.

- General*: general rules of the campaign.
- Dialing*: dialing rules of the campaign.
- Customer management*: web script used, the qualifications, etc.

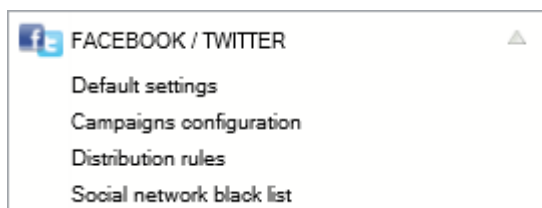



4.5.3 Black list

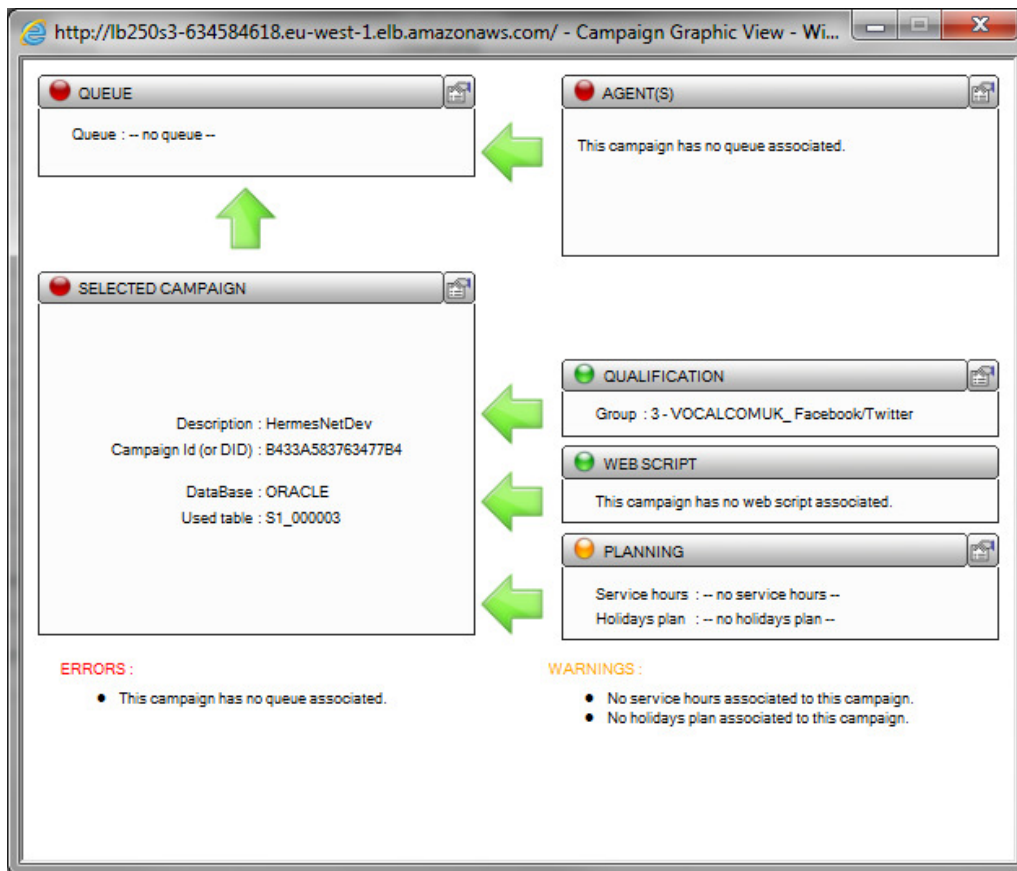
Here, the admin can use the blacklist setup at the ROOT level, and import telephone numbers in it, for example from a CSV/Excel file. With that functionality on, black listed numbers appearing in call files won't be ringed again and will be automatically qualified as **101 – do not call back (blacklisted)**.

4.6 Social networks




In Hermes V5, social networks campaigns are introduced. Facebook and Twitter are supported, and are optional components of the platform.



Please note that each campaign can be quickly checked using the “Campaign summary button” .



The campaign summary allows the admin to quickly check critical elements for the campaign.

-  indicates the element is valid.
-  indicates a warning. The element should be added/corrected, although the campaign will still be valid.
-  indicates a critical error/missing critical element. The campaign won't be valid, for example missing call file for outbound or missing queue for inbound.

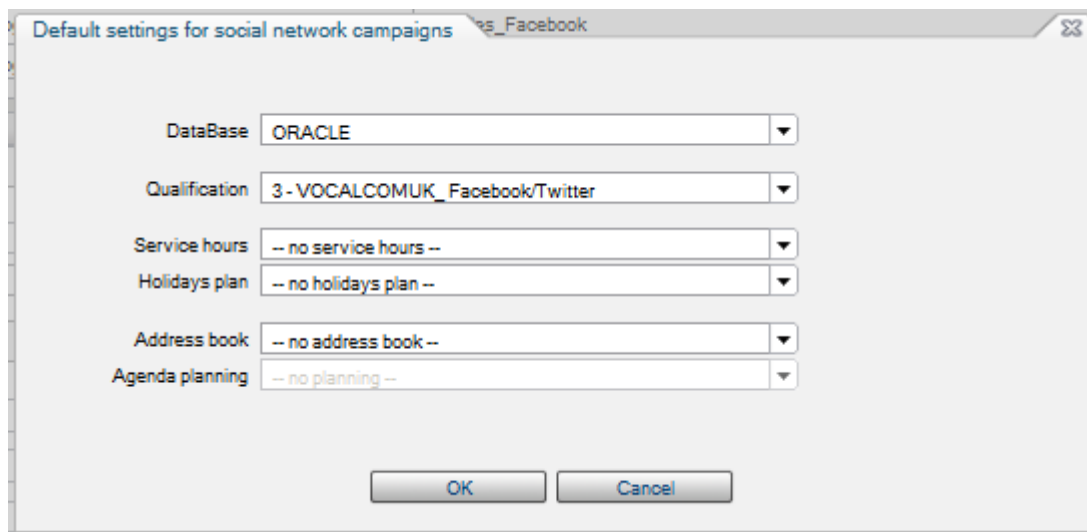
Underneath, the list of **warnings** and **errors** is shown.

Once changes have been made, the color codes correct themselves automatically.

4.6.1 Facebook/Twitter

In this menu, we will create and manage inbound our social network campaigns.

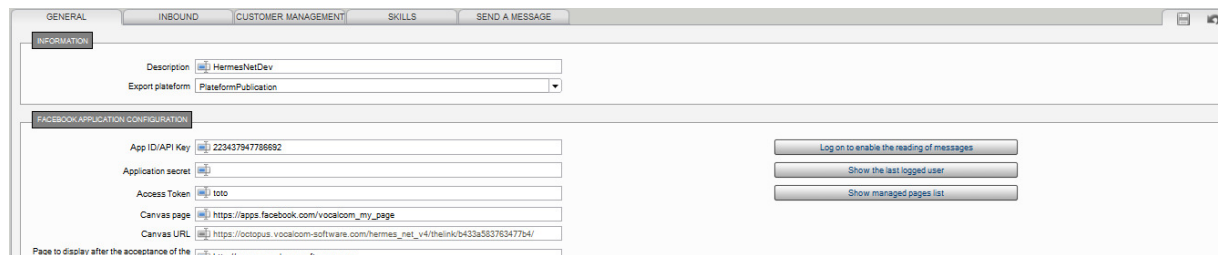
-Default settings: default settings that can be added to any new social network campaign, if needed.



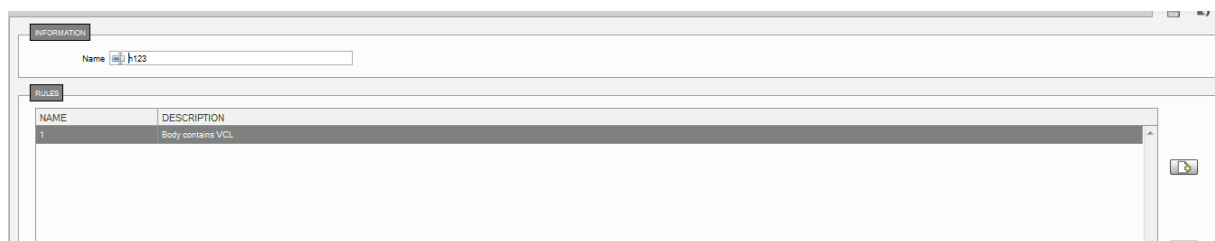
- Database: SQL or Oracle site database used.
- Qualifications: basic qualification group.
- Service hours/holidays plan: basic agent schedule and bank holidays list
- Address book/agenda planning: basic Hermes CRM and appointment agenda.

-Campaigns configuration: here campaigns are created and managed.

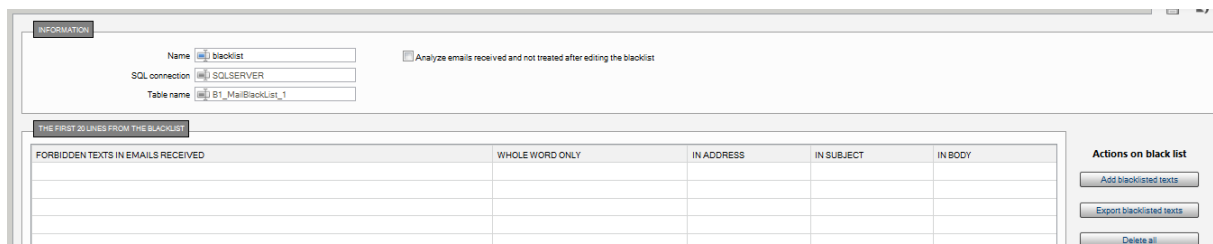
- General: general setup of the campaign.
- Inbound: configuration of queue and rules associated to it.
- Customer management: web script used, address book, email links.
- Skills: skillset used in the campaign.
- Send a message: on Facebook campaigns, send a message to Facebook account's friends and contacts.






-Distribution rules: Allows the use of skillsets in the campaign. Typically, the skill will be linked to a specific element (object of chat, word, question, etc...).



-Social network blacklist: Allows the blacklisting of words, content in the campaign.

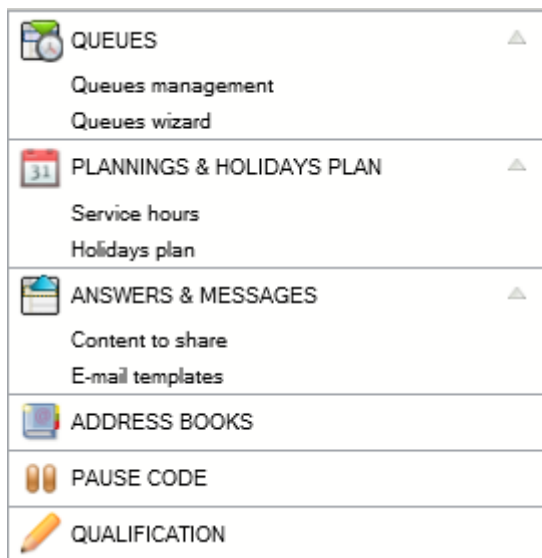


With the  and  buttons campaigns can be added or deleted. Save changes with the  button.

NOTE: Social network campaigns will be explained in full detail in a future document.

4.7 Common settings



In this menu, we can configure elements that will be common to all the campaigns manageable on this site, such as qualifications or pause codes.



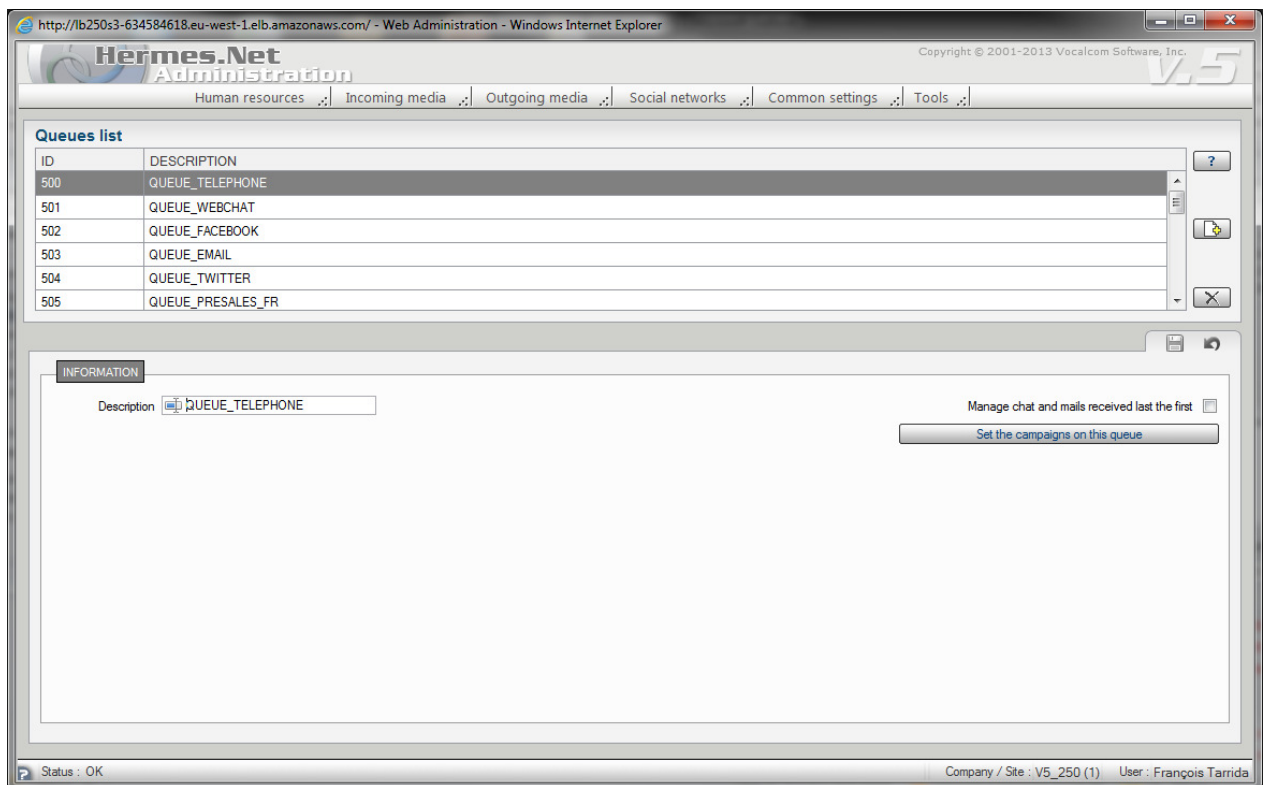
4.7.1 Queues

The queues are a mandatory component of the inbound campaign because in the Vocalcom system, agents are actually linked to queues and not to campaigns,

This window allows you to manage the different QUEUES, used in inbound, email, or chat campaigns. All required queues must be defined here.

Use the  and  buttons on the right side of the screen to create new Queues. By creating a queue, the administrator defines the skills corresponding with the level of agents.

The top side of the window shows the list of queues defined on the system. It contains a unique numeric **ID** composed of 3 characters (beginning with value 500) and the name repeated under **Description**.



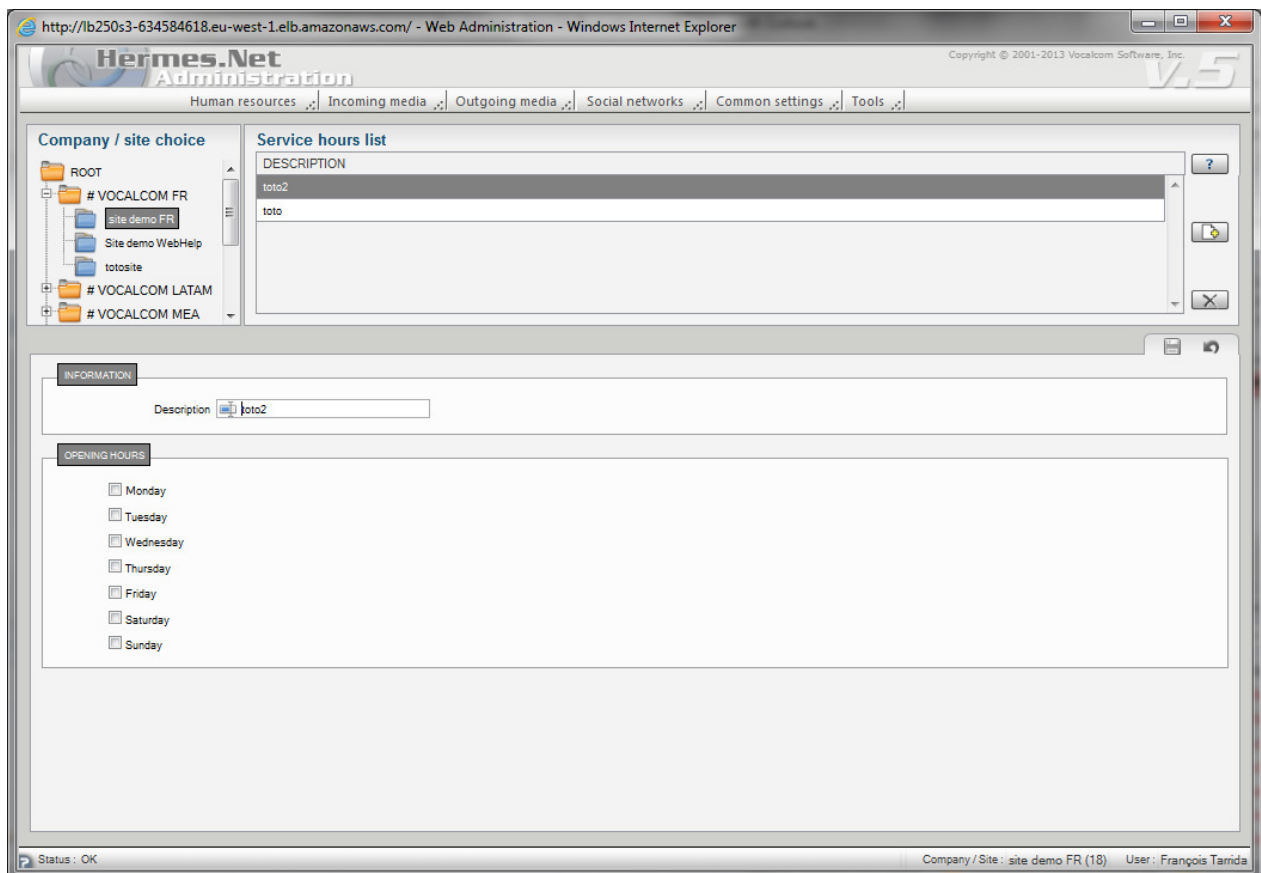
Description: indicates a text to identify the queue. This description also appears during agent configuration.

The information part at the bottom of the screen shows all campaigns to which a certain queue is attached to. Clicking on the queue in the "information part", will bring you to the campaign to which this queue is linked.

By default, older contacts are treated first, but by clicking the **"Manage chat and mails received last the first"**, the rule can be amended.

4.7.2 Plannings & Holidays plan

This section describes how to create and configure service hours and holiday plans.



SERVICE HOURS: The **service hours** let you define the call center’s opening hours. A service hour schedule is identified by a **Description**.

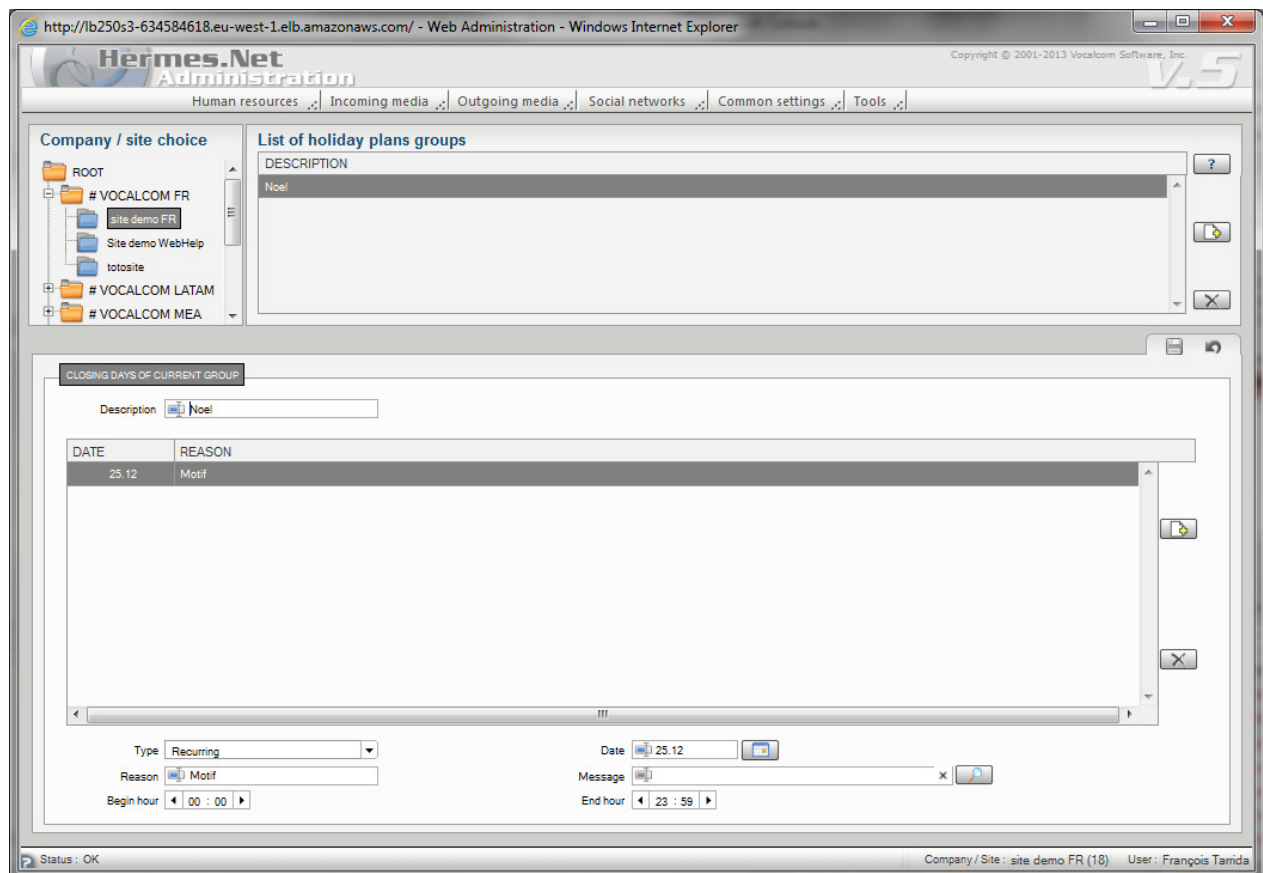
With the  and  buttons on the right side, you can add or delete service hours.

When creating a new service hours schedule, you can use the data of a schedule already defined by selecting its ID in the **Copy from** list.



The **Description** value gives the schedule a name.

The window displays checkboxes for each day of the week. Checking one or more of these boxes indicates that the campaign will run on those specific days.

For each day, 2 time intervals can be selected. The service is considered as ‘open’ when a call arrives on a day that has been checked in the service hours schedule and on an hour that falls between the intervals indicated.



HOLIDAYS PLAN: In this window you can define the campaign’s **business hours**. The calendar is thus assigned to a campaign. A calendar is identified by a **Description**.

With the  and  buttons on the right side you can add or delete calendars. When creating a new holiday plan, you can use the data of a schedule already defined by selecting its ID in the **Copy from** list. The **Description** value gives the holiday plan a name. The **Closing days** field shows the days defined as days during which the service is closed. If the **Date** field does not contain a year, the event is repeated annually on the same date.

Dates can be added or deleted with the  and  buttons. To modify a date in the list, simply complete the fields below it:

Type: indicates if the event is unique (**once**) or **recurring**.

Date (ddmmyyy): to choose a date by entering it directly or selecting it from the calendar window, accessible through the button.

Reason: to describe the event.

Message: to link a specific audio file to the date. By clicking on the button you can select a message from the list of audio (.wav) files on the ACD server.

Begin/end hour: allows specifying begin and end time of the closing period (example: a closed afternoon will begin at “12:00” and end at “23:59”).

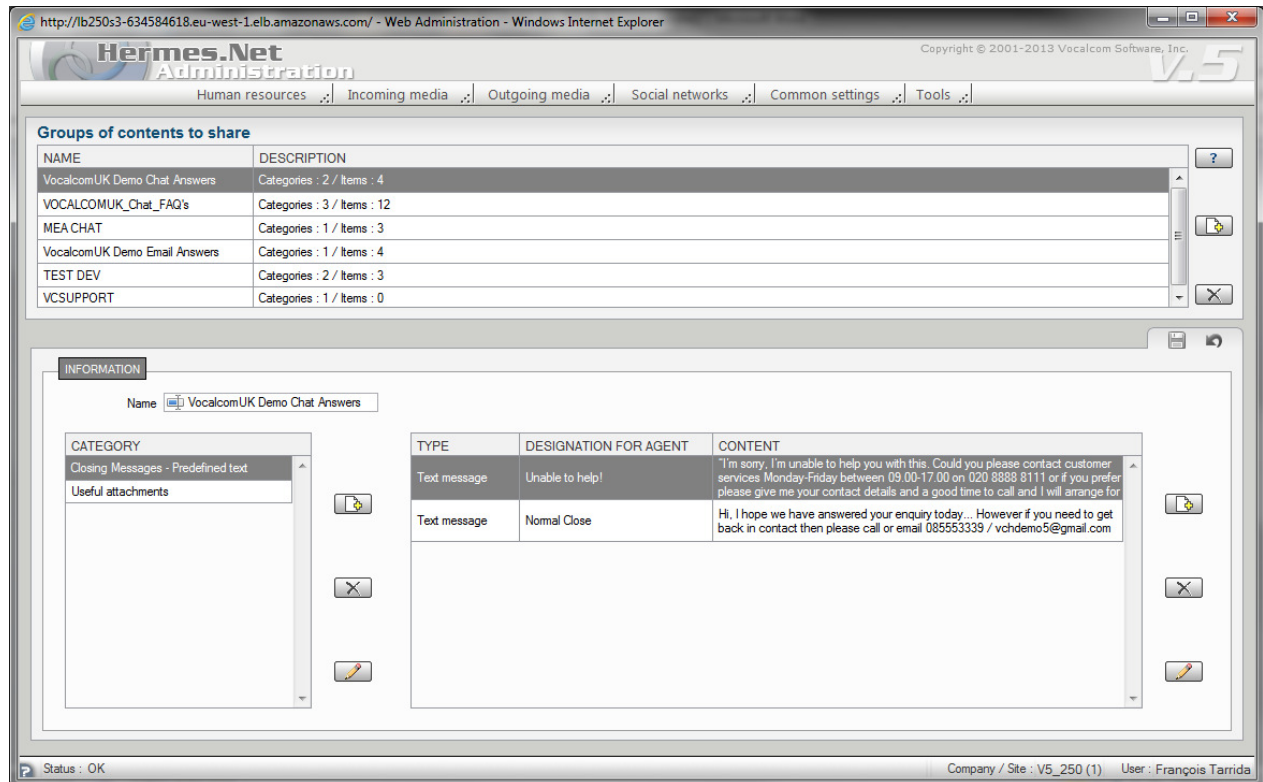
4.7.3 Answers & messages



This menu allows admins to create predefined content for chat and mails, and load documents to be sent as attachments.

-Content to share: This screen is used to define content that can be used in the Agent Mail or Chat interface.

Sentences are grouped into category, and categories are grouped into set. The set is afterwards assigned to the campaign.

Predefined answers significantly shorten response time as agents do not have to manually type information. Furthermore, this enhances consistency and prevents typing errors. Variables are also included as usable features of your contents.

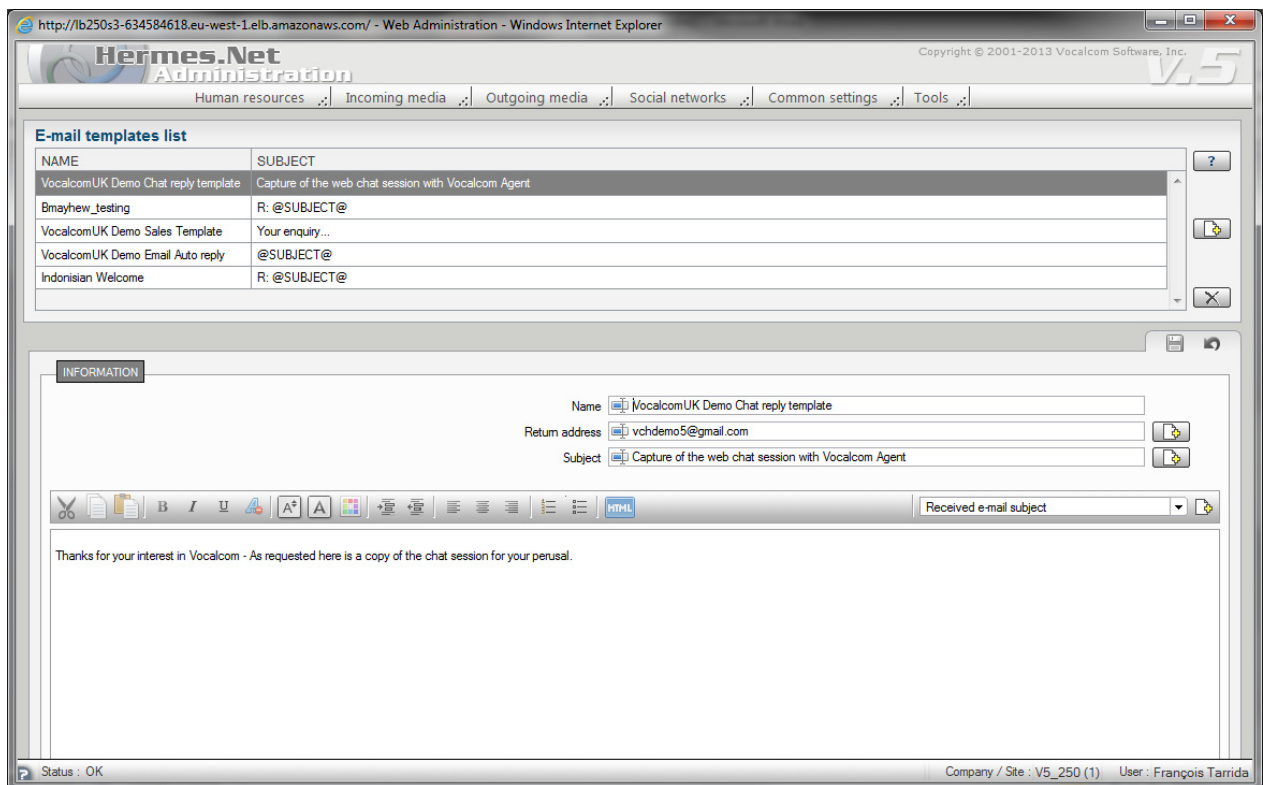




With the  and  buttons on the right side, you can add or delete content.

E-mail templates : This screen is used to design automatic email answers that will be sent to the recipient in case of normal/abnormal closing, during holidays, or for every inbound mail.

Example: the automatic answer named "Answer template" will be used to reply every inbound mail and ensure customer that his request will be treated shortly.

Email templates significantly shorten response time as agents do not have to manually type information. Furthermore, this enhances consistency and prevents typing errors. Variables are also included as usable features of your templates.





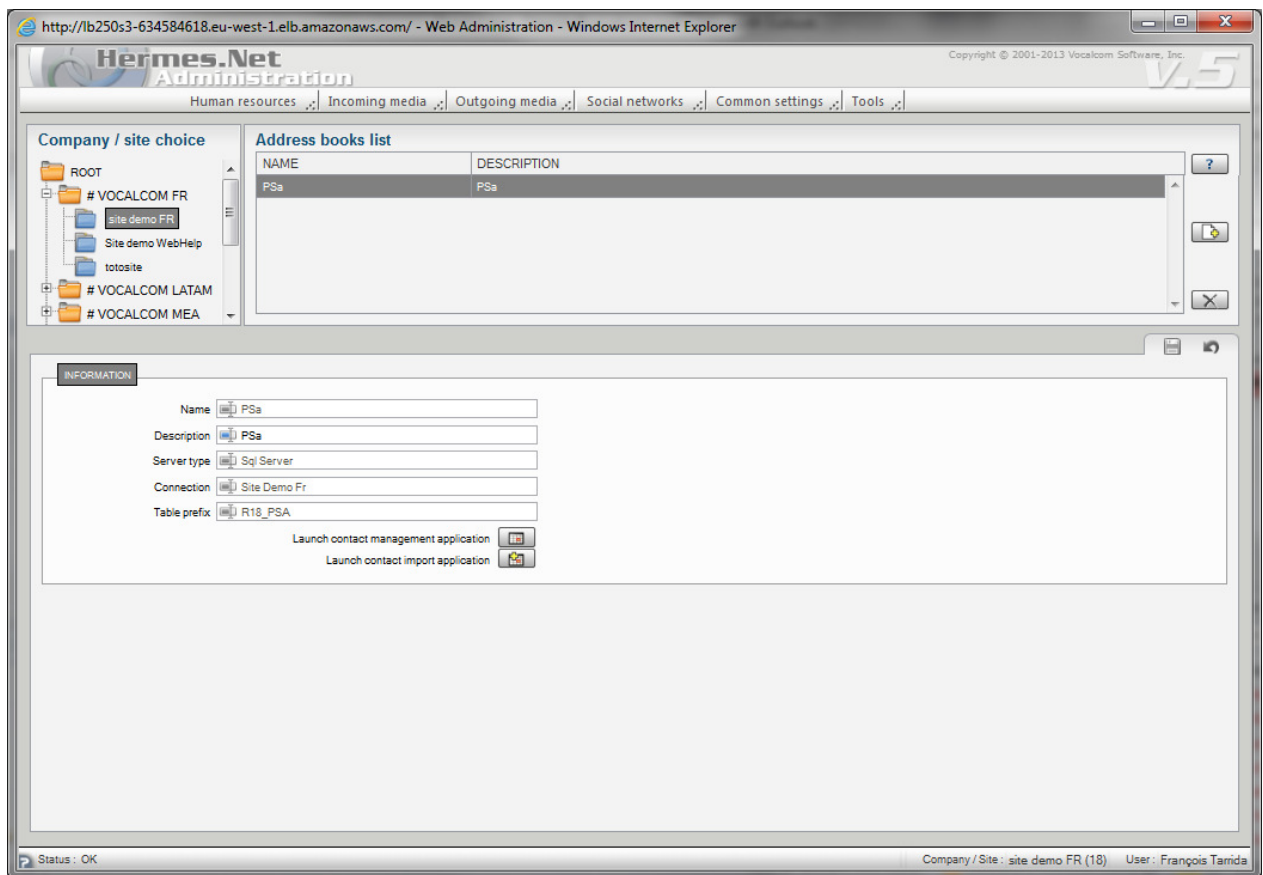
With the  and  buttons on the right side, you can add or delete templates.

4.7.4 Address books

The Address Book is database table used for taking appointments as well as for the registering new customers in the Hermes native CRM (Customer relationship management) found on Inbound or outbound campaigns.

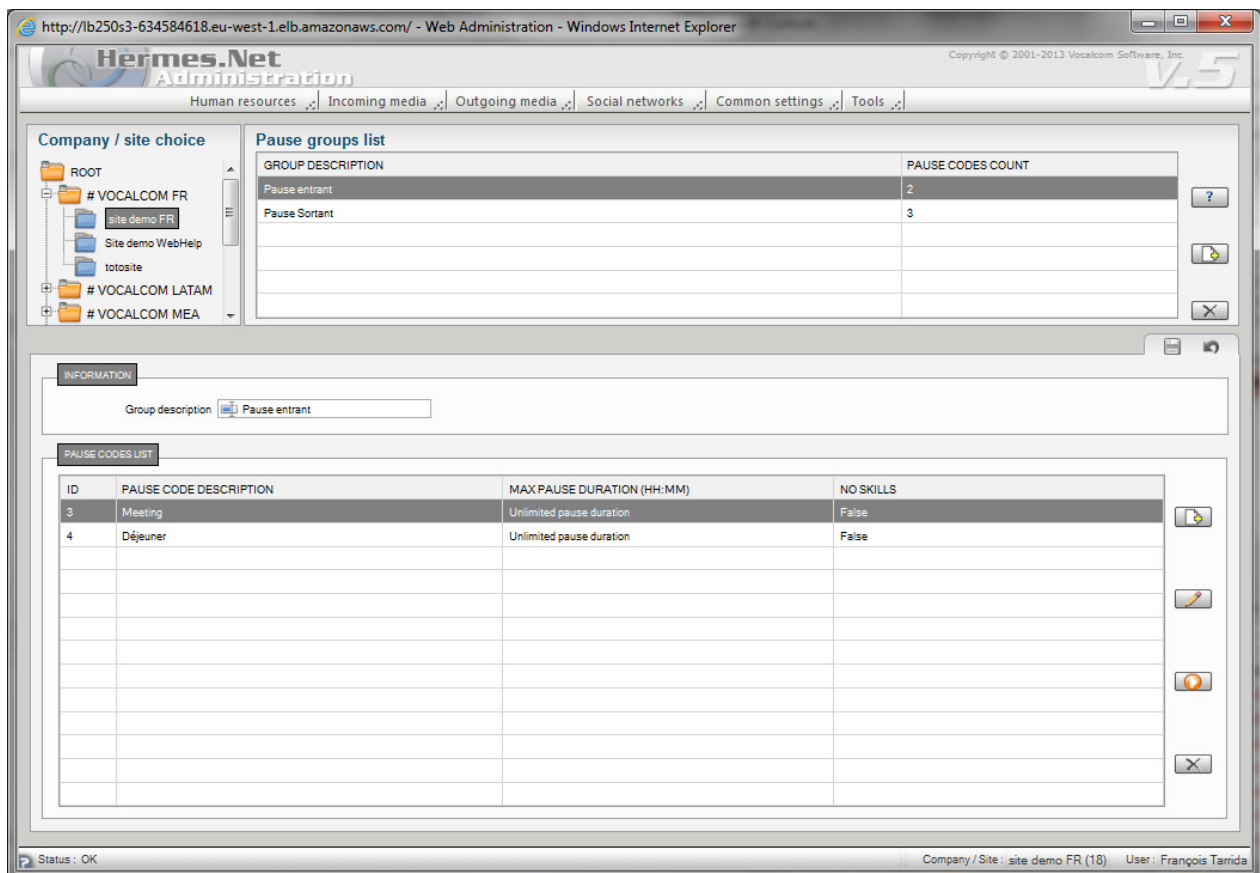
Every inbound or outbound campaign can use a different "Address book".



Use the  and  buttons to add or delete an "Address book". This address book is then linked to a campaign (inbound or outbound) and will be visible in the agent's workspace when the CRM is in use.



4.7.5 Pause code

This section describes how to create and configure pause groups that can be added to the agent workspaces.



A new code can be added or deleted with the  and  buttons. Just enter an ID and a description. These pauses will be proposed to the agent when a call is completed.

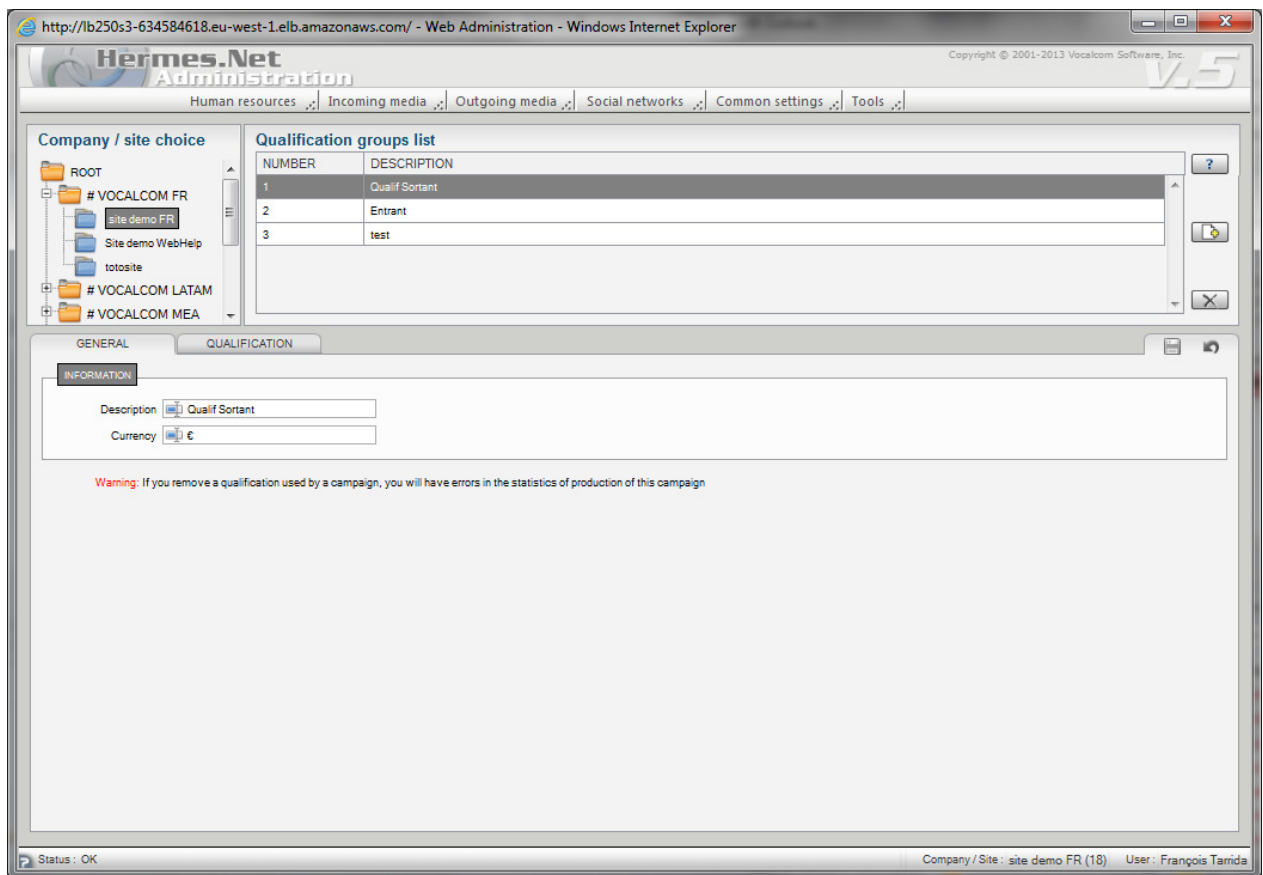
No skills: check this box to suppress the agent skills during this pause. At this moment the ACD will consider that the agent is no longer connected and the supervisors won't see him anymore in the default agent's supervision window.

Max pause duration: this option allows setting up a time limit to a Pause code.

4.7.6 Qualifications

This section describes how to create and configure qualification groups that can be added to the media campaigns, and thus used to create statistics.

When used by agents during call handling, these call statuses are registered in the database server and will be displayed in real-time supervision as well as historical reporting. Reporting and Supervision are separated modules which are explained in other documentations.



Call status sets can be added or deleted with the  and  buttons.

Number: Each call status set (or group) is identified by a unique number between 0 and 99.

The 0 value is reserved for a call status set that can be used in all campaigns.

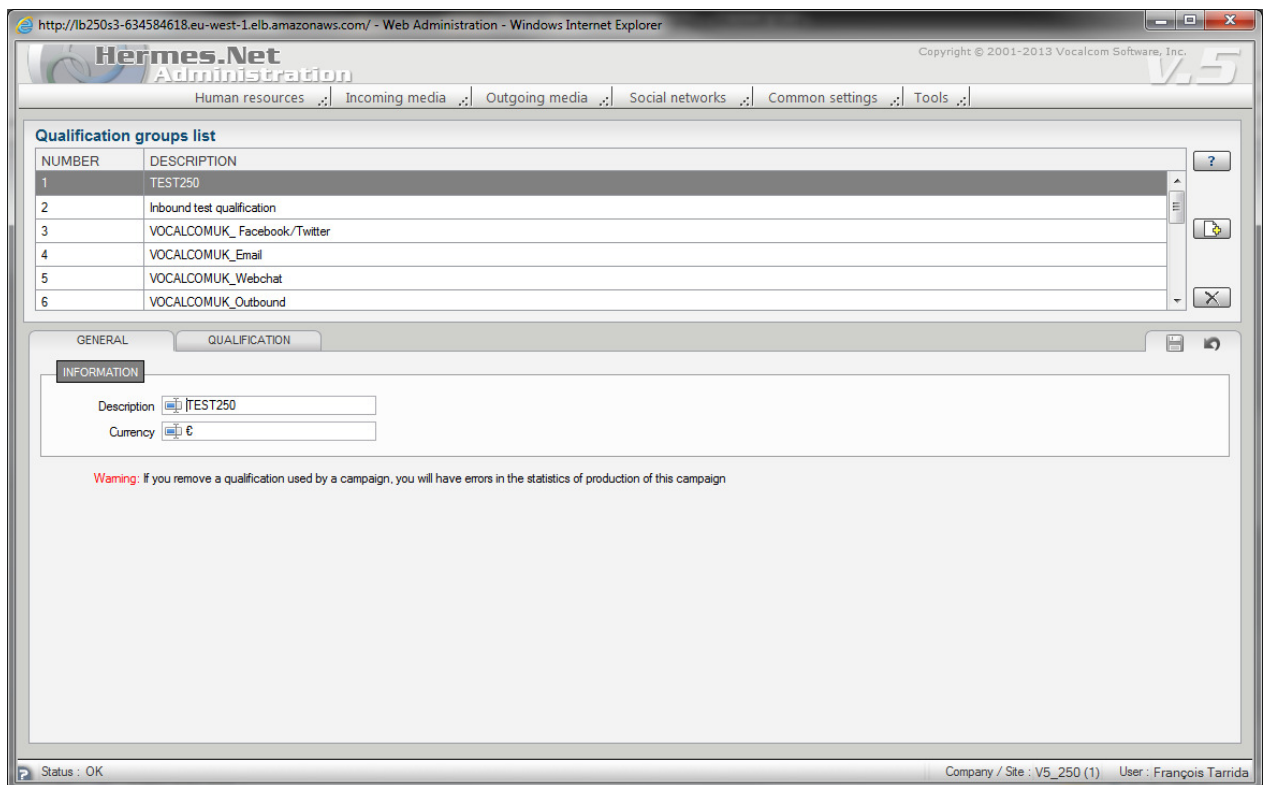
Description: the administrator can enter a brief description of the call status set in this field.

The tabs below the list allow you to configure the call status groups.

GENERAL TAB:

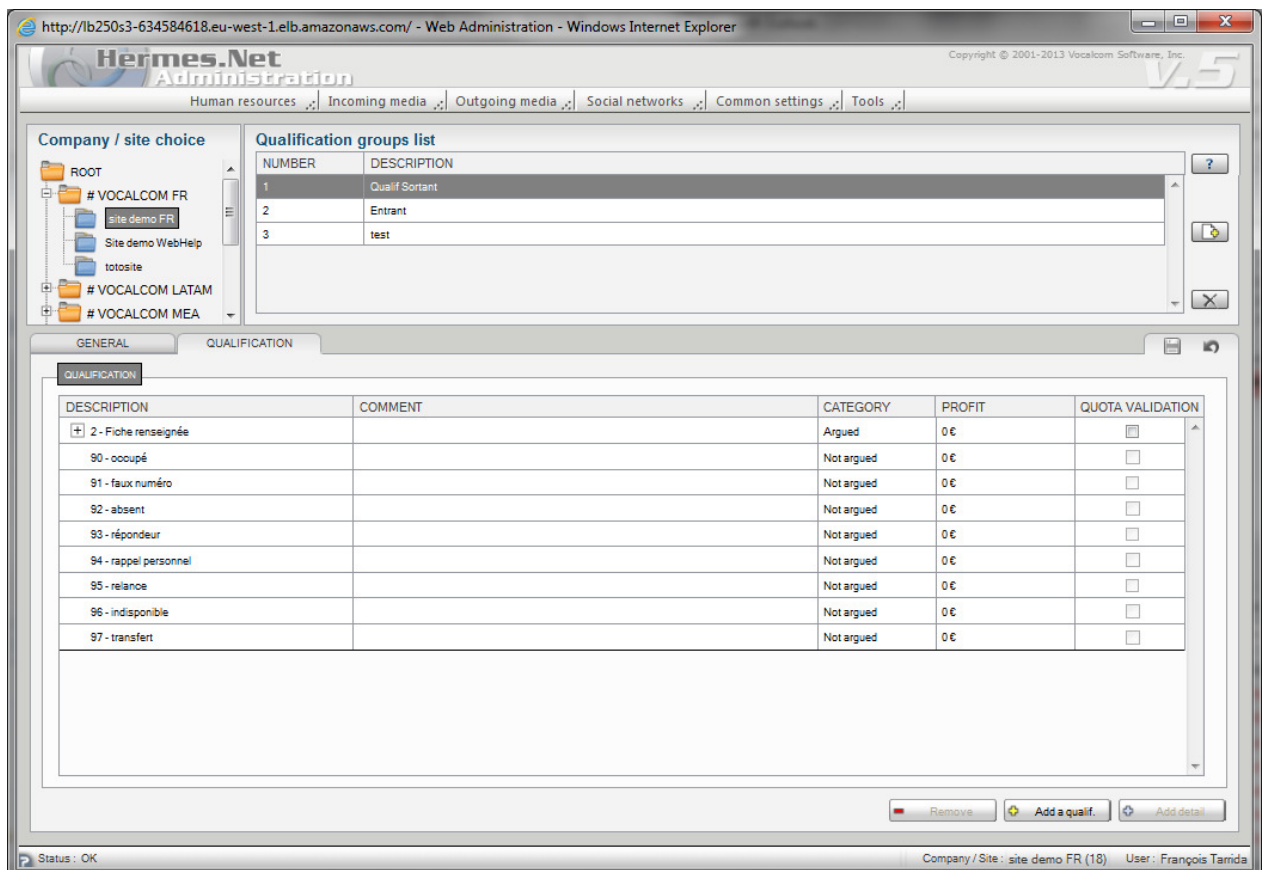
Description: the administrator can enter a brief description of the current call status set in this field.

Currency: allows assigning a currency that can be used later to do traffic cost estimations.



QUALIFICATION TAB :

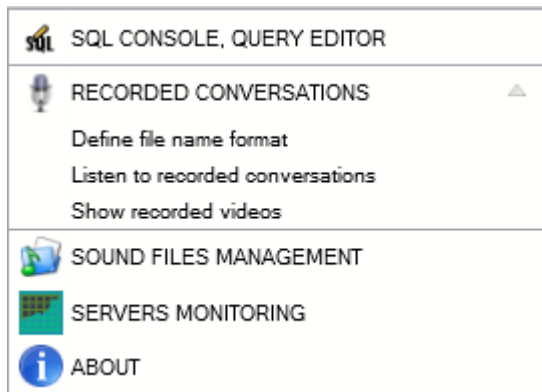
Here the admin can create and add qualifications to the group.



As with previous versions, it is possible to use personal qualifications, system qualifications, and to create qualifications with details. Also, three categories of call qualifications are present (*Positive, Argued, Not Argued*), in order to calculate the **Hit Rate** of the agents in Supervision and Reporting.

4.8 Tools

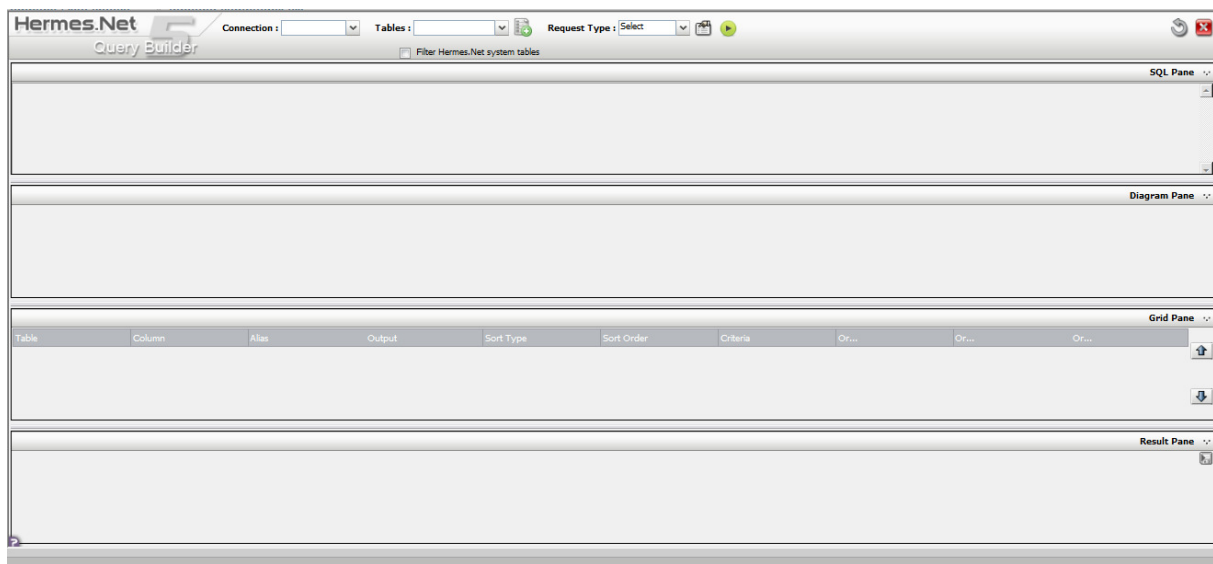
In this menu, we can work on all other technical aspects of the site, or common parameters such as servers monitoring.



4.8.1 SQL console

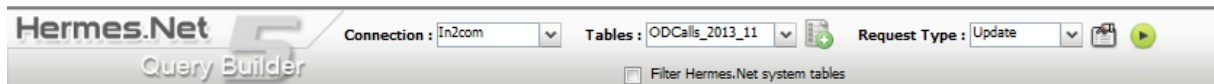
This menu is used to create and run queries (Select, Update, Delete, Insert) on any table of the database server. **Working on databases can be very sensitive**; therefore this window is only to be used by people who were trained accordingly.

The user doesn't need to access the database remotely because the query editor is integrated in the administration module.



STEP 1 – Select connection and table to be used for querying.

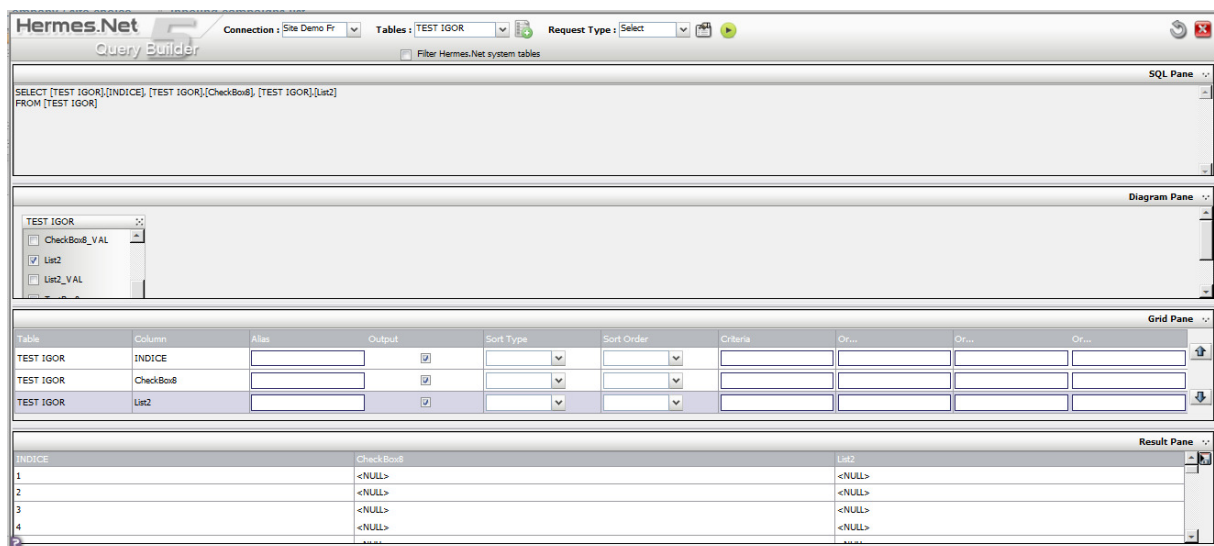
First a request type must be chosen according to the action intended. Select a **“connection”** (database) where you want the query to be run. Then select the **“table”** and press on the button to add the table to the query builder pane.



STEP 2 – Build a query based on the chosen “Request type”.

The window is divided in 4 areas:

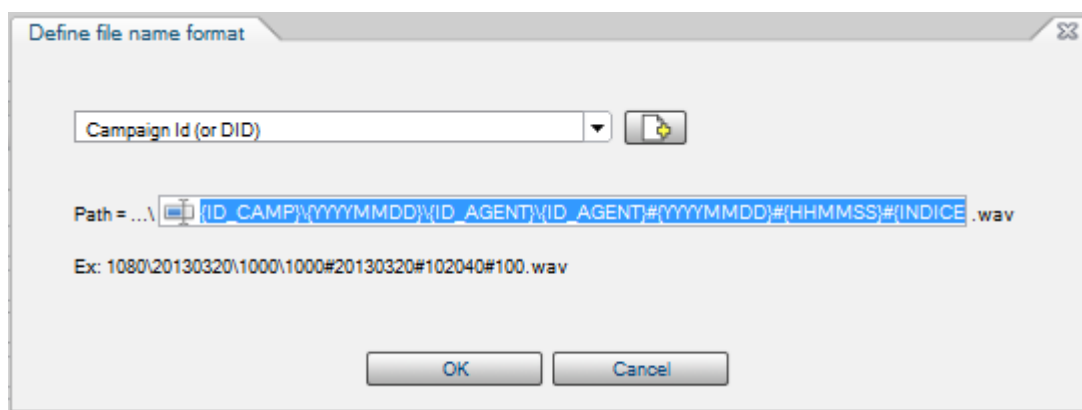
- **SQL pane:** shows the SQL query in SQL syntax. You can also type directly your request in this pane without using the other tools.
- **Diagram pane:** allows choosing the columns used to filter the request.
- **Grid pane:** allows creating the criteria.
- **Result pane:** displays the result of the query once it's been run using the button (top of the screen)



4.8.2 Recorded Conversations

Here we can define a **name format** for all the phone recordings made on the site. The default name can be amended in order for users to find those in an easier way.

Remember, the path to a recorded conversation is always: CAMPAIGN\DATE\AGENT



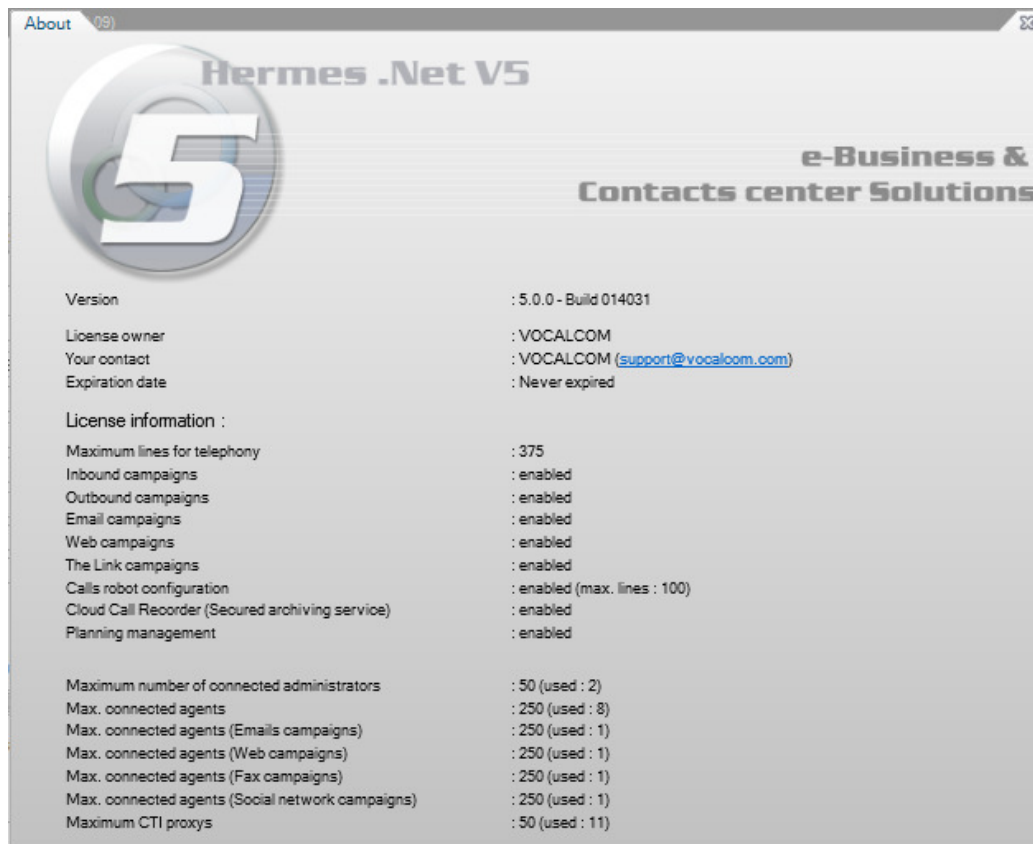
In the same menu, we can thus **listen to all recorded conversations**, or view the **recorded videos**.

4.8.3 Sound files management

This option is used to manage (find/upload/delete) the sound files saved on the server. **Please note that all sound files should be in the .WAV format (8bit, 8k, mono, CCIT, Alaw or Ulaw).**

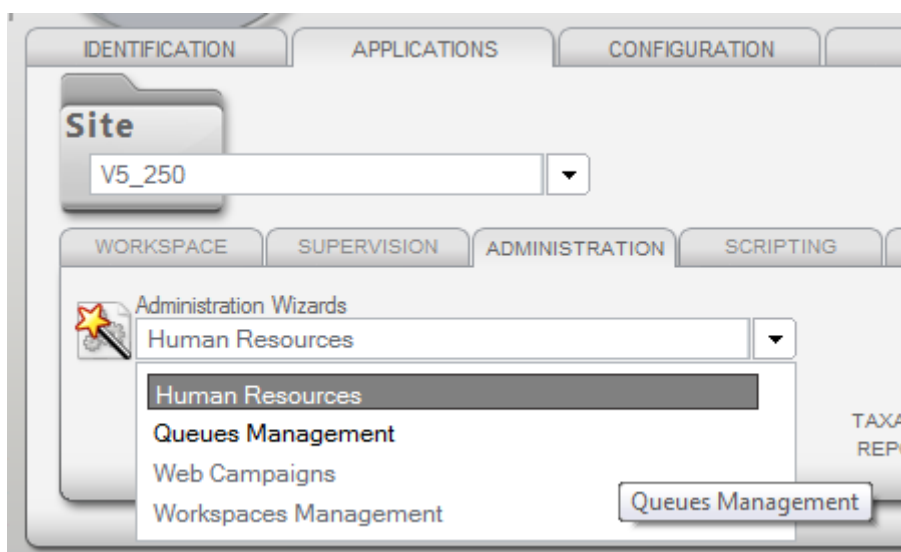
4.8.5 About

This window gives access to the server licenses information, and how many are currently being used in the platform.



5. Wizards

New to Hermes V5, user wizards have been added as a quick management, to allow admins to setup items in a centralized screen. Wizards can be reached from the general Hermes menu, or in Administration, at the site's level, and open in a popup screen.





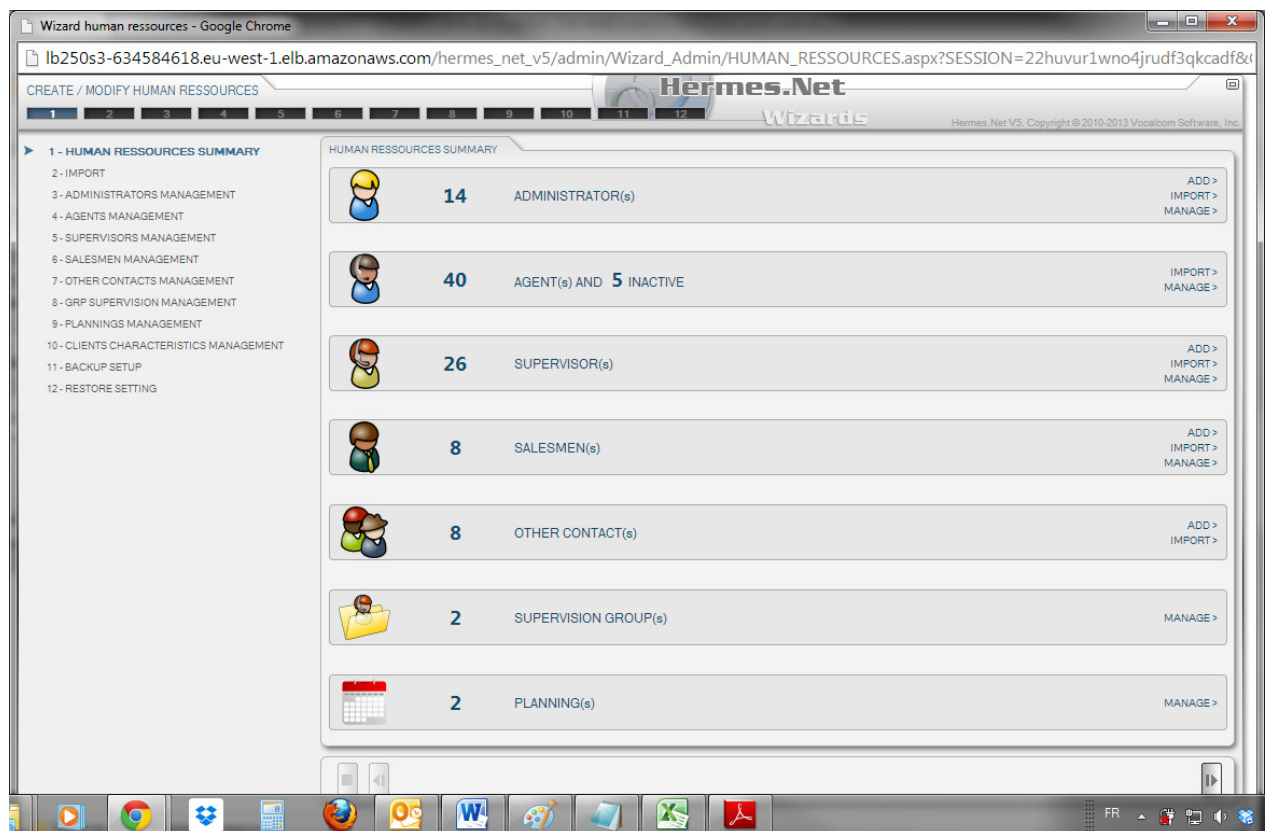
New wizards will be added with future upgrades; right now the following wizards are usable:

5.1 Human Resources

Create and manage your Human resources quickly via the HR wizard.



On the left, all the different topics that can be managed in the wizard. In the center, the different accounts and items managed via the wizard. You can either add new, import

from a file, or manage existing accounts. The wizard is navigated via the  and  at the bottom of the popup.

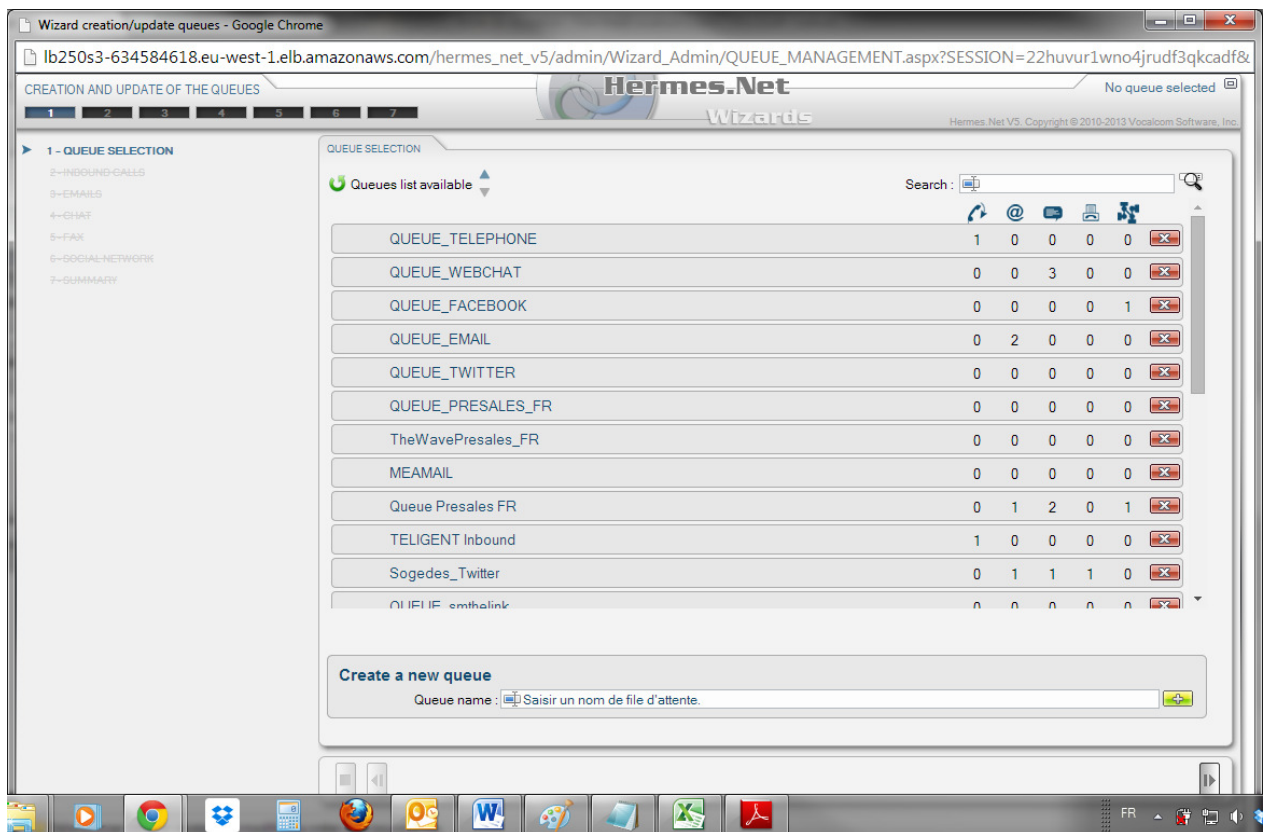


5.2 Queues Management

Create and manage your inbound queues quickly via the Queues wizard.





On the left, all the different medias that can be managed in the wizard. In the center, the different queues already created. Press  to add a new queue, and  to delete an existing one. You can see quickly which medias are being run in a queue. The wizard is

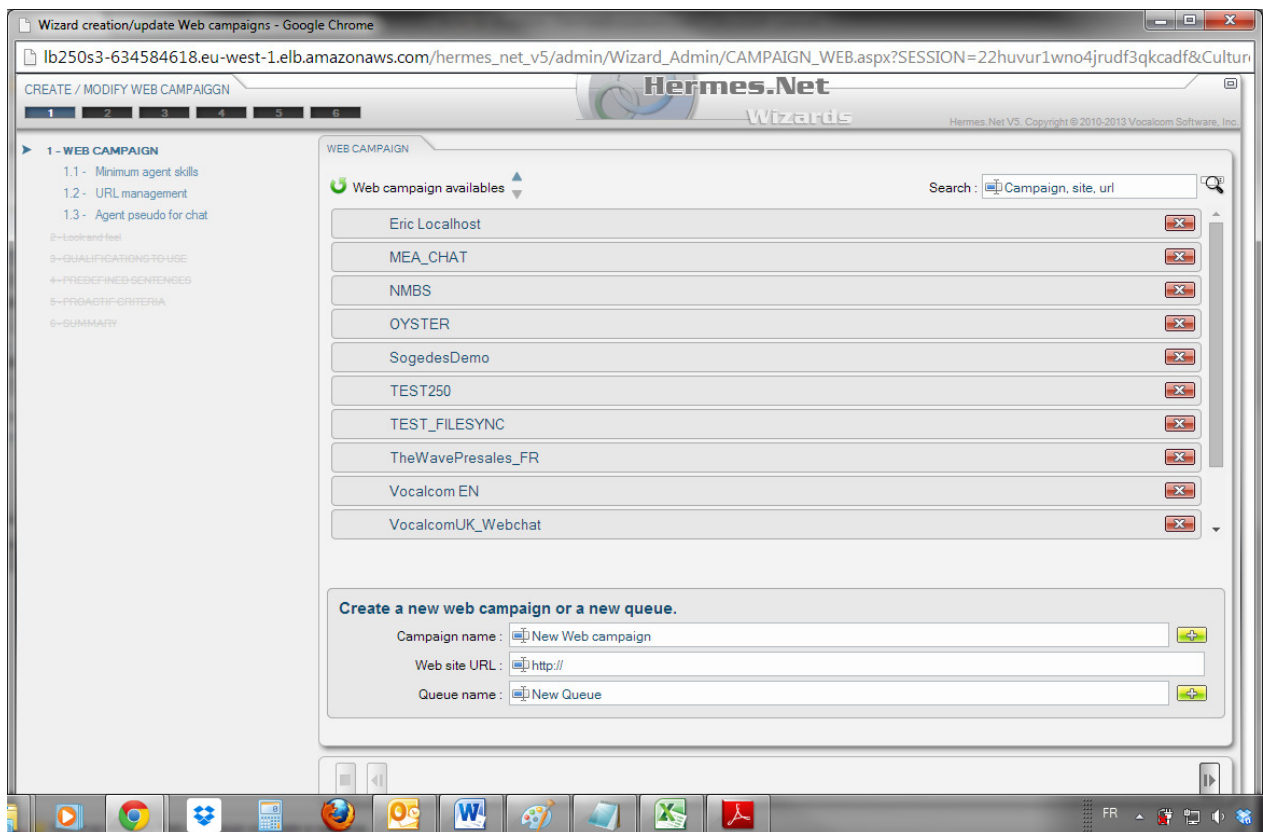
navigated via the  and  at the bottom of the popup.



5.3 Web Campaigns

Create and manage your web campaigns quickly via the web campaigns wizard, rather than going through Administration.

On the left, all the different parts of the campaign that will need to be added in the wizard. In the center, the different campaigns already created. Press  to add a new campaign, and  to delete an existing one. The wizard is navigated via the  and  at the bottom of the popup.



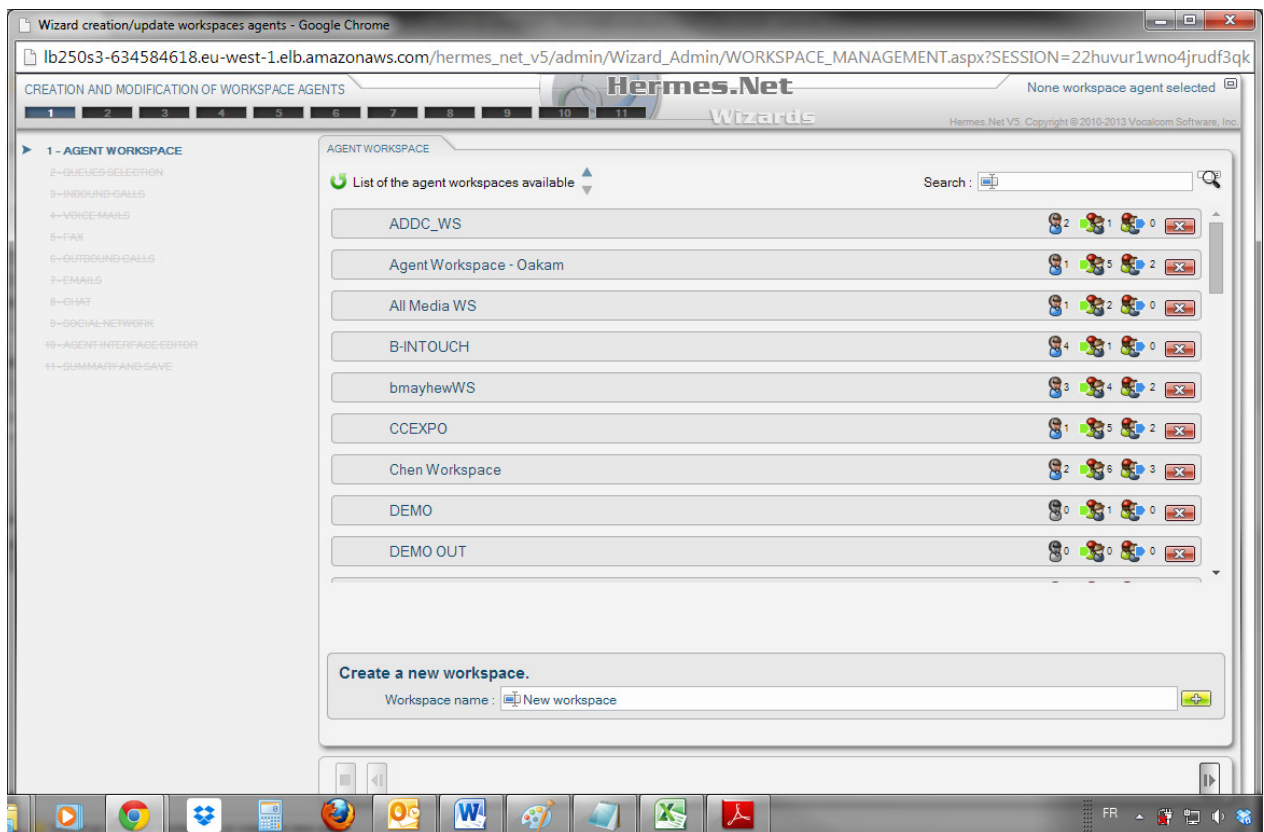
5.4 Workspaces Management:

Create and manage your workspaces via the workspaces wizard. Compared to Hermes V4, workspaces are NOT created in the Interface Designer module, but in the Workspaces management wizard. As well, agent groups have been removed, and workspaces replace them in term of team management. It is the workspace that now defines what the agent can be working on, etc...

On the left, all the different parts of the workspace that will need to be added in the wizard. In the center, the different workspaces already created, and how many users are already using them. You can see quickly which agents are using the workspace. Press

 to add a new workspace, and  to delete an existing one. The wizard is

navigated via the  and  at the bottom of the popup.



Workspace in use :

