Nortel Networks Symposium Web Center Portal

User Guide for Agents and Supervisors

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NORTEL NETWORKS™

Nortel Networks Symposium Web Center Portal
User Guide for Agents and Supervisors

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Getting started

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Overview

Introduction

Symposium Web Center Portal Release 3.0 is part of Nortel Networks'
Symposium suite of applications. This product allows you to receive, route,
track, and respond to customer requests over the Internet.

Symposium Web Center Portal features

Multiple ways to respond to customer inquiries

Symposium Web Center Portal agents can respond to transaction requests
through a variety of media, including phone, e-mail, Internet text chat, and form
sharing. The agent desktop software for Symposium Web Center Portal provides
automation for these responses to eliminate repetitive actions, such as
addressing an e-mail or typing a common response in text chat. As a result, it
can reduce agents' handling time, fatigue, and mistakes.

The agent/client interface presents the agent with a browser-based graphical user
interface. Agents use the interface to respond to customers' requests by
telephone, e-mail, or via the Web.

About this guide

Distribution of this guide

The *Symposium Web Center Portal User Guide for Agents and Supervisors*, Release 3.0, is available only in electronic portable document format (.PDF) on the documentation CD-ROM that is supplied with the Symposium Web Center Portal Product release 3.0 software.

You can view this guide online using Acrobat Reader, or you can print the guide in whole or in part for individual use.

Online Help

Symposium Web Center Portal Product release 3.0 software provides the following online Help:

■ Symposium Web Center Portal Product release 3.0 Online Help for Administrators

■ Symposium Web Center Portal Product release 3.0 Online Help for Agents and Supervisors

Skills you need

To use this guide and Symposium Web Center Portal effectively, you must have experience with computers and the Internet.

Chapter 2

Performing Agent tasks

In this chapter

Section A: Using the Agent Workbook

In this section

Overview

Introduction

The Agent Workbook is a browser-based application that allows an agent to receive customer inquiries and e-mail messages from the Web. The agent can respond by telephone or e-mail, or over the Internet using the Web Communication Manager.

In addition, agents can use the Agent Workbook to view, sort, and select transactions; to log fax, mail, and courier responses; and to maintain customer information.

Logging on to the Agent Workbook

Introduction

This section provides instructions on how to log on and off the Agent Workbook.

Notes:

1. You must use Internet Explorer 5.0 or higher.

2. You cannot log on more than one agent from the same PC simultaneously.

To log on to the Agent Workbook

1   If you have any Internet browser windows open, close them now.

2   Use your web browser to navigate to your Symposium Web Center Portal address. For more information about the Symposium Web Center Portal address, refer to the *Symposium Web Center Portal Installation and Administration Guide*.
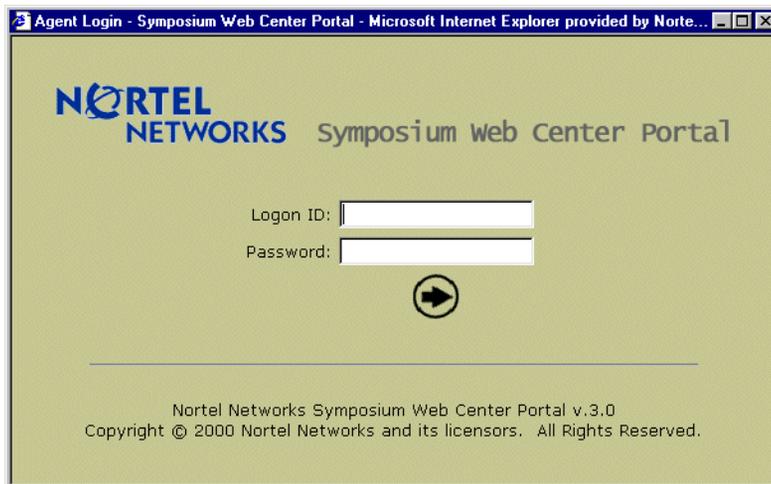
3   Type your logon ID and password.

4   Click the OK icon ⊙ to open the Agent Workbook.

Result: The Java applet loads, and the Agent Workbook appears. The Symposium Web Center Portal startup window also appears. Do not close this window.
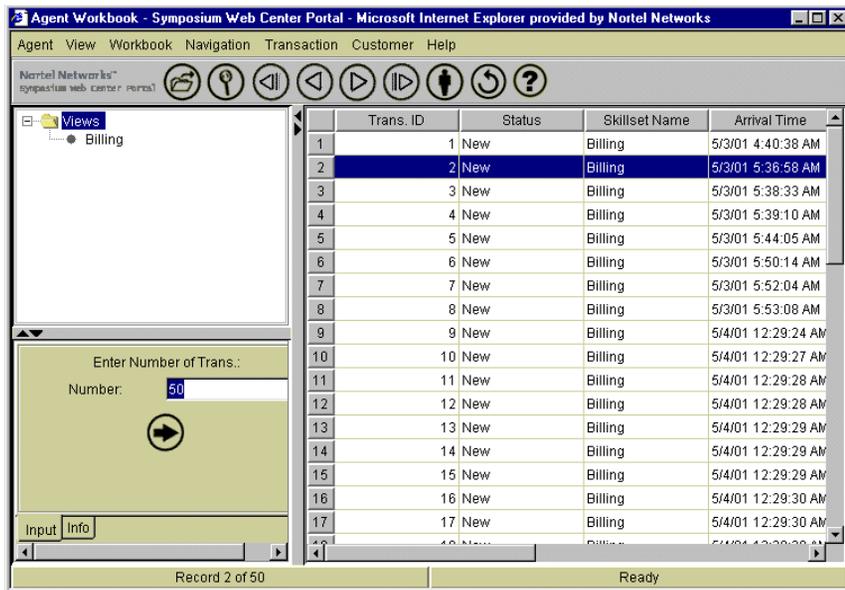
5   It can take several seconds before the Agent Workbook appears. However, once the applet is downloaded, it is cached on the agent's PC. Since the applet does not need to be downloaded the next time the agent logs on, the process is much faster.

To log on when you already have an active account

1   Use your web browser to navigate to your Symposium Web Center Portal address. For more information about the Symposium Web Center Portal address, refer to the *Symposium Web Center Portal Installation and Administration Guide*.

2   Type your logon ID and password.

3   Click the OK icon ⊙ to open the Agent Workbook.

4   If you have an account that is already active from a previous session, the following message appears:

5   Click OK to set the first account to inactive and allow you to log on as normal.

6   If you click Cancel, you return to the logon page.

To log off

On the toolbar, click Agent → Logoff.

Result: You are logged off the Agent Workbook. If you see dialog boxes asking if you want to end your session, click Yes on all of these dialog boxes.

Note: If you accidentally close the browser window, the system automatically logs you off.

To change the logon password

1   On the toolbar, click Agent → Change Password.

        Result: The Change Password window appears.

2   In the Current Password box, type your current password.

3   In the New Password box, type the new password you want to use.

4   In the Confirm Password box, type the new password again.

5   Click the Save icon .

Working with the Agent Workbook

Introduction

This section provides an overview of the functionality of the Agent Workbook. It also provides procedures to sort transactions, change the auto refresh interval of the Agent Workbook, and change the layout of the Agent Workbook.

Understanding the Agent Workbook

The following window illustrates the major areas of the Agent Workbook:
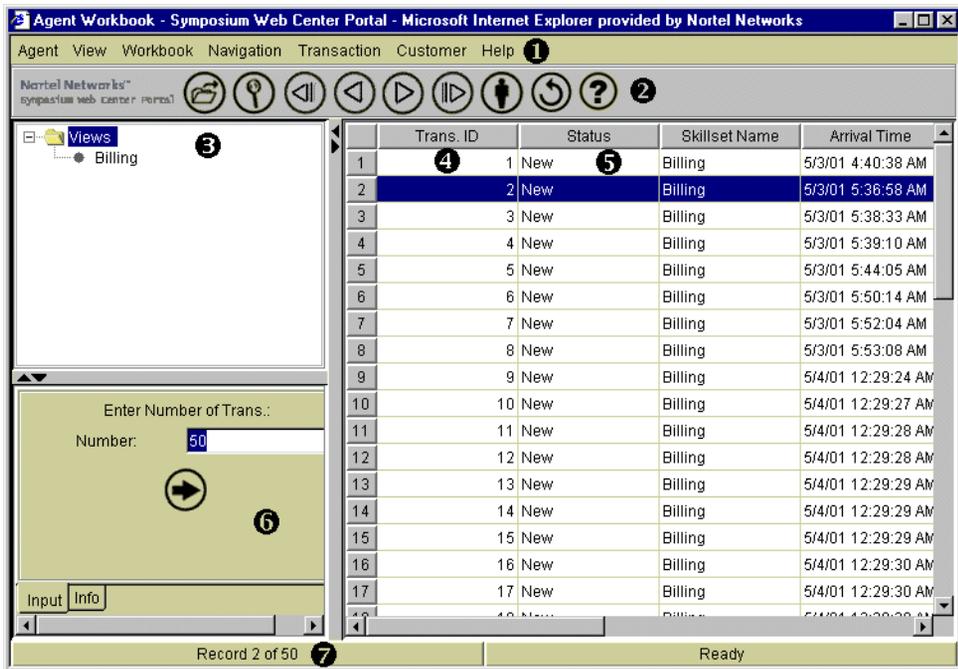
1   Menu Bar – A drop-down menu appears when you click on a menu name.

2   Button Bar – As you pass the pointer over a button, its color changes to white to show that it is active. Hold the pointer over a button for a few seconds. The name of the button appears.

Open selected transaction icon – Opens the Transaction Detail window for the transaction you selected.

Find transaction icon – Allows you to search for transactions based on up to three criteria.

First icon – Allows you to view the first 50 transactions assigned to a skillset.

Previous icon – Allows you to view the previous 50 transactions assigned to a skillset.

Next icon – Allows you to view the next 50 transactions assigned to a skillset.

Last icon – Allows you to view the last 50 transactions assigned to a skillset.

Display customer details icon – Allows you to view and update customer information.

Refresh Transactions icon – Allows you to view new transactions assigned to a skillset.

Help icon – Allows you to access information about the Symposium Web Center Portal Agent Workbook.

3   **Views** – By clicking on a skillset, the agent can limit the number of transactions contained in the list of transactions on the Agent Workbook.

For more information, see "Using views" on page 27.

4   **Transactions** –When the agent first logs on, a list of transactions appears, with one transaction per line. Use the scroll bar to scroll through the list of transactions.

For more information about viewing transactions, sorting transactions, and resizing and reordering columns, see "Viewing transactions" below, and "Using views" on page 27.

5   **Status** – Displays the status of the transactions in Symposium Web Center Portal. You can change the status of the transactions on the Transaction Detail window. The status of a transaction can be one of the following:

-   New – The initial status of all transactions. Transactions that have not been answered by an agent.
-   Open – Transactions that are currently being worked on by an agent.
-   Pending – Transactions that were viewed and worked on by an agent but have not yet been completed.
-   New Reply – New communications from customers regarding existing transactions, a transferred transaction, or a transaction that was de-assigned by a supervisor.
-   Closed – Transactions that have been completed.
-   Acquired – Transactions in the queue that have not been opened. Only supervisors see acquired transactions.

6   **Input** – If a menu option requires information, the input boxes appear on this tab. For example, if you select Navigation $\rightarrow$ Set number of Trans., a box appears where you enter the desired number of transactions.

Info – A confirmation message appears on the Info tab.

7   **Status bar** – From left to right, the status bar shows

-   which transaction is selected out of the total number of transactions listed on the Agent Workbook
-   the system status. For example, when the system is refreshing the data, a message appears in the status bar describing the status of the refresh.

Viewing transactions

By default, 50 transactions appear on the Agent Workbook at one time. To change the number of transactions that appear on the Agent Workbook, follow the procedures on page 24. When the list of transactions appears, the transactions are sorted by status (new/pending/new reply, closed, or all, skillset (alphabetical), and date (oldest first).

To view more transactions

1   On the Navigation menu, click Goto.

2   Click one of the following:

- First – to see the first 50 transactions

- Next – to see the next 50 transactions or fewer

- Previous – to see the previous 50 transactions or fewer

- Last – to see the last 50 transactions

To change the number of transactions shown on the desktop

1   On the Navigation menu, click one of the following:

- Load all – All the applicable transactions appear. Based on the number of applications, it can take several minutes to download the transactions. The default displays 50 transactions. Load all is not recommended with very high numbers of transactions.

- Set number of Trans. – On the Input tab, type the number of transactions you want to view, and then click the arrow button. The number of transactions must not exceed the maximum range established by the administrator in the userdef.vbs file.

- Specify Trans ID From/To – On the Input tab, type the beginning and end ID numbers of the range you want to view. The number of transactions must not exceed the maximum range established by the administrator in the userdef.vbs file.

2   On the View menu, click Refresh → Transactions.

Sorting transactions

When transactions first appear, they are sorted by status (new/open/pending/new reply, closed, or all), skillset (alphabetical), and date (oldest first).

To sort the transactions in a different order

1   Click the column heading of the box by which you want to sort. For example, to sort by status, click the Status column heading.

2   To reverse the order, click the same column heading again.

Refreshing data

You can configure the system to automatically refresh data, but the agent can also control refreshing data.

To refresh data manually

If the information in the Agent Workbook does not update automatically after you have made a change, you can manually refresh the information.

1   Click View → Refresh Now.

Refreshing data automatically

When the Auto Refresh feature is turned on, the information in the Agent Workbook is updated automatically at a frequency set by the system administrator.

The default is for the Automatic Refresh feature to be turned off.

To turn Automatic Refresh on or off

When Automatic Refresh is turned on and the data refreshing is taking place, the system is temporarily unusable.

1   Choose View → Automatic Refresh.

Note: On the Automatic Refresh menu, a check mark beside an option indicates that it is turned on.
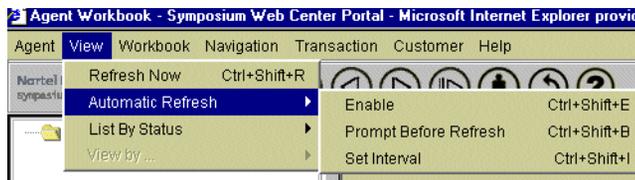
2   To turn on Automatic Refresh, click Enable.

Result: The next time you select Automatic Refresh, a check mark appears beside Enable.

3   To turn off Automatic Refresh, click Enable again.

Prompt before automatic refresh

When you enable Prompt Before Refresh, the system asks you if you want to refresh the Agent Workbook before the refresh takes place.

Changing the Automatic Refresh interval

The default refresh interval is 15 minutes. The administrator can configure the Automatic Refresh feature to allow you to change the frequency at which the automatic refresh takes place.

Note: Frequent automatic refreshing can cause network congestion and decrease server performance.

To change the Automatic Refresh interval

1   Choose View $\rightarrow$ Automatic Refresh $\rightarrow$ Set Interval.

2   On the Input tab, in the Time Delay box, enter the frequency in minutes at which you want the automatic refresh to take place.

3   Click the arrow icon ⊕.

Changing the appearance of the Agent Workbook window

Use the Workbook menu to

■   change the layout of the Agent Workbook window

■   make all the transactions columns a consistent width

■   return to the default layout

In the transactions area of the Agent Workbook, you can change the width and order of the columns.
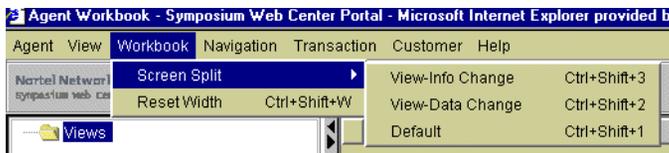
Using views

Introduction

The different views in Symposium Web Center Portal allow you to refine the list of transactions presented on the Agent Workbook. The views are shown on the frame on the left side of the Agent Workbook window.
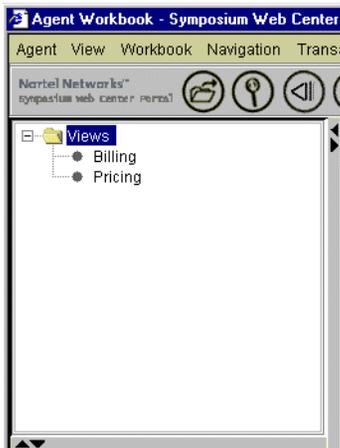
Agents see the transactions for the skillset(s) to which they are assigned. The agents see the following information for each transaction:

- Trans ID – The unique number assigned to each transaction.

- Status – The current status of the transaction (new, pending, closed, or new reply).

- Skillset Name – The skillset to which the transaction is assigned.

- Arrival Time – The time at which the transaction was initially presented to an agent.

- Call Back Time – The time at which an agent replied to the customer.

- Call Back Media – The method by which the agent replied to the customer.

- Source – The source of the transaction (for example, the Web or telephone).

- Customer Last Name – The last name of the customer.

- Customer First Name – The first name of the customer.

Supervisors see the transactions for all the agents in the call center. Supervisors see all the information about the transactions that the agent sees, as well as the following information:

■   Agent Last Name – The last name of the agent assigned to the transaction.

■   Agent First Name – The first name of the agent assigned to the transaction.

■   E-mail Subject – The topic of the e-mail assigned to an agent.

To use the views

1   Click the plus sign (+) beside a folder to display the contents of the folder.

2   When there is no plus sign (+), click the folder itself to display the transactions on the right.

Using the skillset view

Use the skillset view to show

■   all the unassigned transactions

■   all the transactions for the skillset to which you are assigned

■   all closed transactions

To use the skillset view

1   Click the plus sign (+) beside View.

Result: The list of the skillsets to which you are assigned appears in the tree structure.

2   Click a skillset.

Result: A list of skillsets to which you are assigned appears in the tree structure. All the transactions assigned to that skillset are listed on the right.

Enabling the Agent View

The Agent View allows supervisors to oversee the status of all the transactions sent to the call center. Supervisors can see which agent is responsible for which transaction. Use the Agent View to show all transactions related to a specific agent.

To enable the Agent View

1 From the View menu, choose View by → Agent view.

Result: The names of the agents are listed in the tree structure.

2 Select an agent's name.

Result: Only the transactions assigned to that agent are listed on the right.

Note: Only agents who have serviced the current 50 transactions appear in the tree structure. If another 50 transactions appear, the tree structure may change to show more or fewer agents.

Working with transactions

Introduction

When agents open a transaction, they take ownership of it until it is closed or transferred to another skillset, or a supervisor de-assigns the transaction. When supervisors open a transaction, they do not take ownership of it. The supervisor can view the details of a transaction and change the status of it; however, the supervisor cannot respond to a transaction.

Symposium Web Center Portal works in two modes:

- Push mode – A pop-up window appears notifying you of a new transaction.
- Pull mode – You must select the transaction from the list on the Agent Workbook.

To accept a new transaction

1   When the TAPI Desktop Monitor dialog box appears on the screen, click Accept to take ownership of the transaction.

2   Do one of the following:

a.   If Keep Call is activated, the phone is placed in the connected state and the Hangup button appears. Press Hangup when you are finished with the transaction. If you must place an outbound call from the Agent Interface or the phoneset, refer to page 39.

b. If Drop Call is activated, the phone is placed in the Not Ready State and the Ready button appears. Click Ready when you are finished with the transaction.

Result: The Transaction Detail window appears.
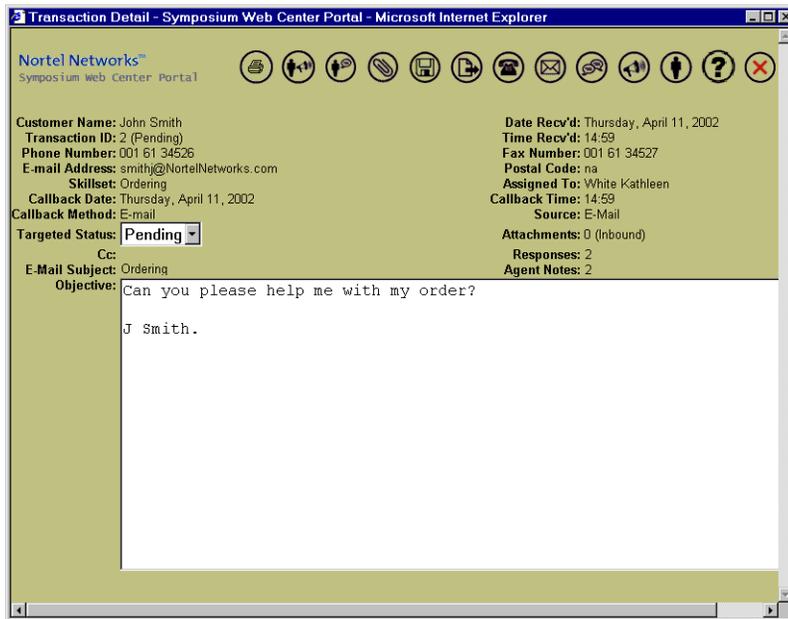
Opening a transaction

Open a transaction with any status, provided it does not already belong to another agent. When you open a transaction, you take ownership of it. No other agent can open a transaction that belongs to you. Once you open a transaction, use the Transaction Detail window to view information about the customer and the transaction.
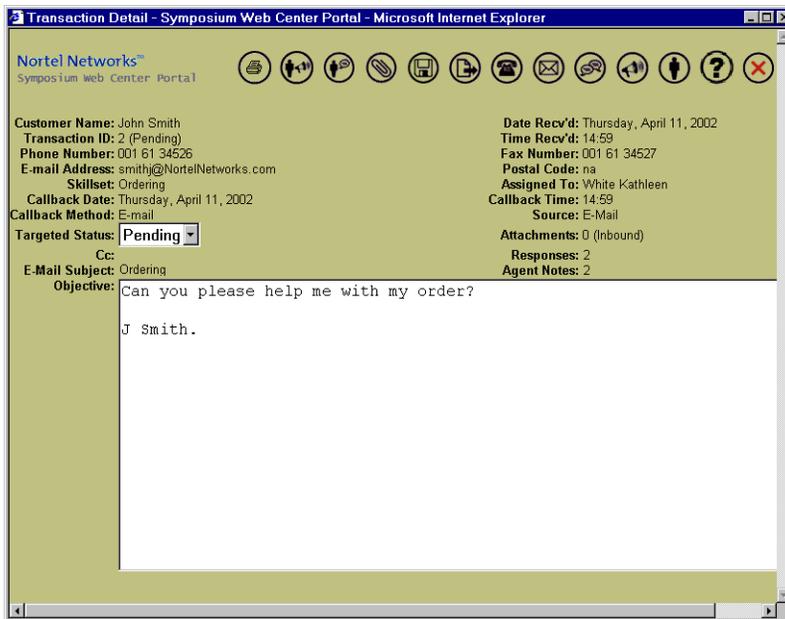
If you try to open a transaction that belongs to another agent, the following window appears:

To open a transaction

When the notification appears, click Accept to accept the transaction, or select the transaction from the list of transactions.

Result: The Transaction Detail window opens.

To view information about an existing transaction

1   Double-click the transaction.

Result: The Transaction Detail window appears.

For help in finding a transaction, see

- "To view more transactions" on page 24

- "Sorting transactions" on page 24

- "Using views" on page 27

- "To find a transaction" on page 35

- "To list transactions by status" on page 36

Using the Transaction Detail window

The following icons appear on the Transaction Detail window:

Print transaction – Allows you to print the information about the transaction.

View response – Displays any previous responses to the transaction.

Click Stream Inquiry – Allows you to view all the web pages that the customer visited after he or she visited the web center and submitted a transaction.

View e-mail attachments – Allows you to view all the attachments associated with an e-mail.

Save – Saves a change to the transaction status.

Transfer Transaction – Allows you to transfer a transaction to another skillset.

Make a call – Allows you to reply to a customer by telephone.

Send an e-mail response – Allows you to reply to a customer by e-mail.

Start the Web Communication Manager – Allows agents to chat, exchange forms, and view web pages with customers.

Create general response – Allows you to keep track of a transaction for which you do not use e-mail, telephone, or the Web Communication Manager.

Display customer details – Allows you to view and update customer information.

Help – Allows you to access information about the Transaction Detail window.

Exit – Closes the Transaction Detail window.

Note: If you are logged on as a supervisor, you cannot process transactions; therefore, the following icons do not appear on the Transaction Detail window when you are logged on as a supervisor:
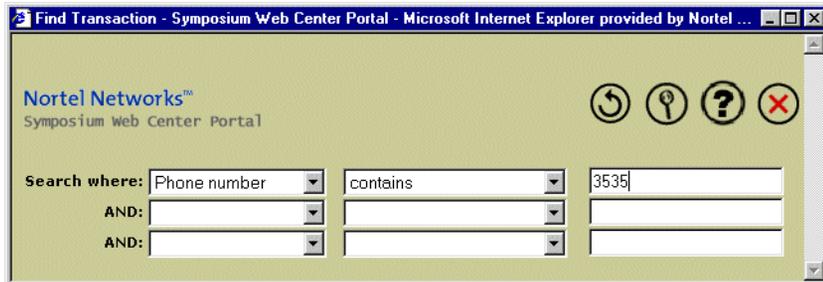
- Make a call
- Send an e-mail response
- Start the Web Communication Manager

To find a transaction

You can search for any unassigned or closed transaction that is assigned to you or your skillset.

1   On the Agent Workbook, click the Find Transaction icon ⊘ to open the Find Transaction window.

   Result: The Find Transaction window opens.

2   In the first column, select the transaction detail for which you want to search (for example, Transaction ID, Customer surname, or Date received).

3   In the second column, select the restriction for the search (for example, "begins with" or "equals").
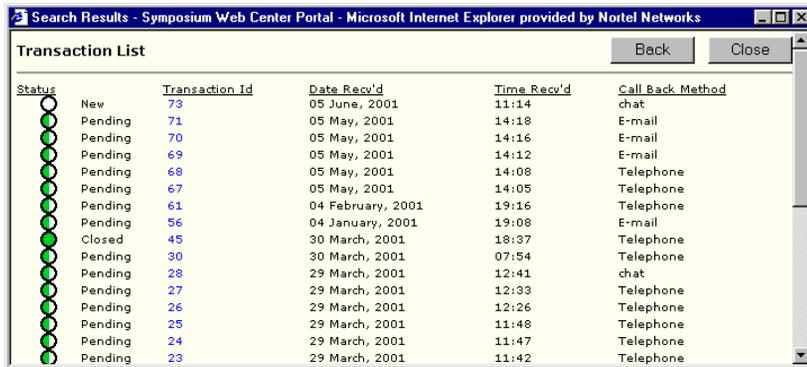
   Note:

   ■ If you use "equals" to find a transaction by customer surname, you must enter the entire surname.

4   In the third column, type the number, name, or date that you want to find. The transaction search is not case-sensitive.

   Note:

   ■ If you try to find a transaction by date, the current date is automatically populated into the third column. This date is in local format mm/dd/yyyy (for example, 7/31/2002). You must enter all dates in the same format, which you can do by editing the current date.

5   Click the Find icon to start the search.

   **Result:** The results of your search appear in the Transaction List.

6   Do one of the following:

   ■ If the search results are satisfactory, click the Transaction Id to open the Transaction Detail window for that transaction.

   ■ If you want to refine your search, click Back.

   ■ If the system is busy, click Back and try again.

7   To close the Search Results window, click Close.

To list transactions by status

1   Choose View → List By Status.
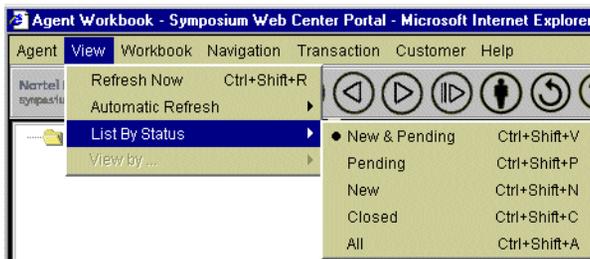
2   Select the status by which you want to filter the transactions:

   ■ New & Pending – Shows transactions that have not been assigned to an agent, transactions that have been assigned to a new skillset, and

transactions that were viewed and worked on by an agent but have not yet been completed.

- Pending – Shows transactions that were viewed and worked on by an agent but have not yet been completed.

- New – Shows transactions that have not been assigned to an agent.

- Closed – Shows transactions that have been completed.

- All – Shows all transactions.

Result: Only the transactions that belong to the status you selected appear in the list of transactions.

Replying to customer requests

Introduction

Follow the procedures in this section to respond to a customer by e-mail, telephone, or the Web Communication Manager.

To reply to a customer request by e-mail

1   When the notification appears, click Accept to accept the transaction, or select the transaction from the list of transactions.

2   Click the Send email response icon ⊠ to create an e-mail response.

Result: The Symposium eMail Manager window opens. The customer's e-mail address is taken from the customer's request and filled in automatically.
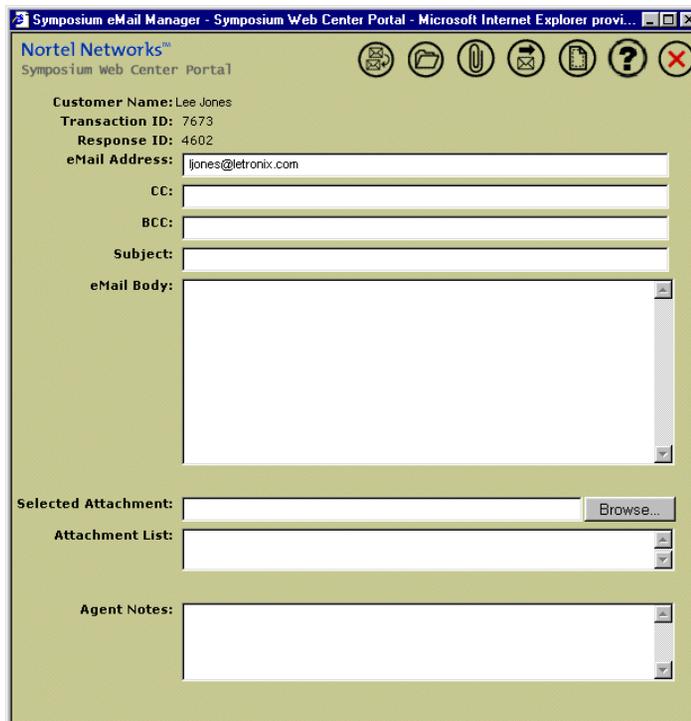
3   Type the subject of the message.

4   In the subject box, type the message text.

Note: To add an attachment or use a template response, see "Working with e-mail" on page 48.

5   Click the e-mail history icon to include all of the previous correspondence with the customer in the eMail Body text.

6   Click the Send icon 🔘 to send the e-mail to the customer.

Result: The e-mail is sent and the Symposium eMail Manager window closes.

To reply to a customer request by telephone

1   When the notification appears, click Accept to accept the transaction, or select the transaction from the list of transactions.

2   Click the Make a call icon 🔘 to open the Phone Response window.

Result: The Phone Response window appears. The Phone Number box contains the phone number of the customer.
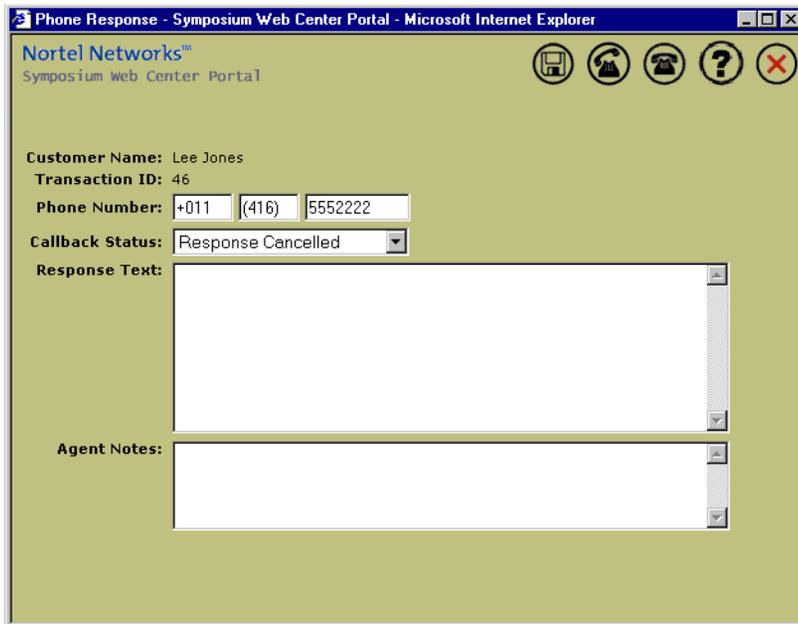
3   Click the Make call icon to call the customer.

    Result: The telephone dials the customer's number.

4   Click the Hangup Call icon when the call is complete.

5   Update the Callback Status (for example, to Call Completed).

6   In the Response Text area, type a summary of the conversation.

    Note: The customer can view the information in the Response Text box.

7   In the Agent Notes box, type information about the transaction or the customer.

    Note: Only agents and supervisors can view the information in the Agent Notes box.

8   Click the Save icon .

    Result: The Phone Response window closes.

Placing calls in keep mode

When you make an outbound call from the Agent Interface in keep mode, the hangup dialog box disappears, and you must disconnect the original call on the phoneset to receive new Symposium Web Center Portal calls.

To make an outbound call from the phonset in keep mode

1   Place the original call on hold.

2   Make the outbound call on the phoneset.

3   When you are finished the call, disconnect the call on the phoneset.

4   Reconnect to the original Symposium Web Center Portal call.

5   When you are finished with the transaction, disconnect the original call from the phoneset.

ATTENTION   Do not place a call from the Agent Interface and then hang up on the phoneset or vice versa. Use one or the other.

Placing calls in drop mode

When you make an outbound call from the Agent Interface in drop mode, the Not Ready dialog box disappears and you must manually make the phone ready to receive new Symposium Web Center Portal calls.

Replying to a customer using the Web Communication Manager

A customer can request a web communication chat session, or, during a telephone response, you can initiate a web communication session to send web pages to each other, or to help a customer complete a web form.

For information, see "Using the Web Communication Manager" on page 61.

To print a response

1   Double-click a transaction.

2   On the Transaction Detail window, click the View response icon to view a list of the responses for the transaction.

Result: The Transaction Response List window appears.

3   Click the Response Id that you want to view.

Result: The eMail Response Detail window appears.
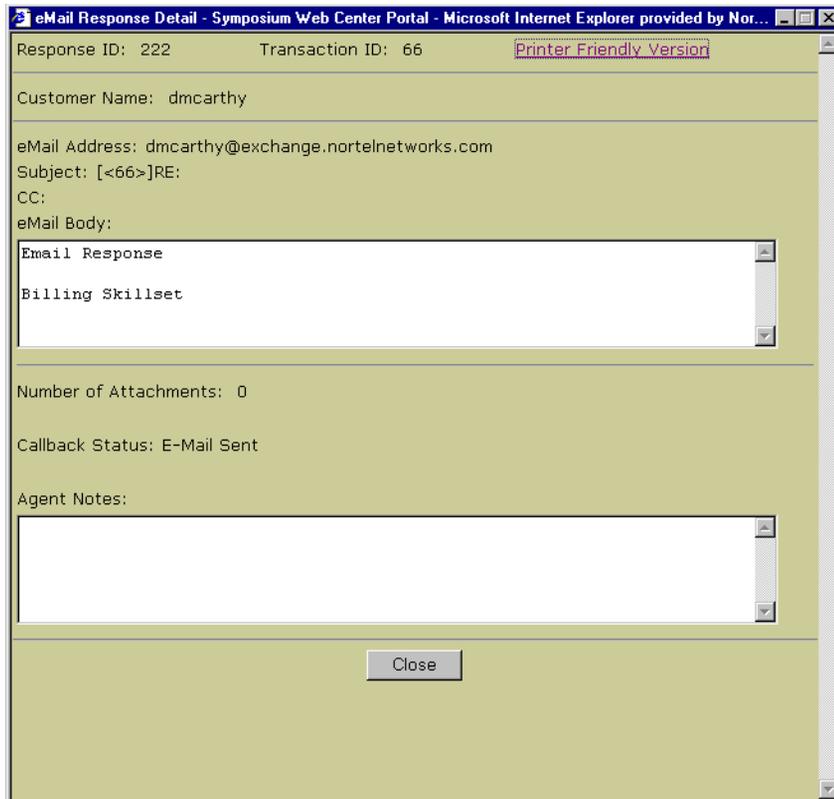
4   Click Printer Friendly Version, and then click Print.

Maintaining and closing transactions

Introduction

The General Response window allows you to log the faxes, letters, and courier responses that you sent out to customers. You can also use the General Response window to record de-assigned transactions or any other comments for the customer or for the agents.

Note: This window does not send out faxes for you. Symposium Web Center Portal does not support faxed responses.

To log fax, mail, or courier responses

1   When the notification appears, click Accept to accept the transaction, or select the transaction from the list of transactions.

2   Click the Create a general response icon ⊕ to log information about a transaction.

　　　　Result: The General Response window opens.
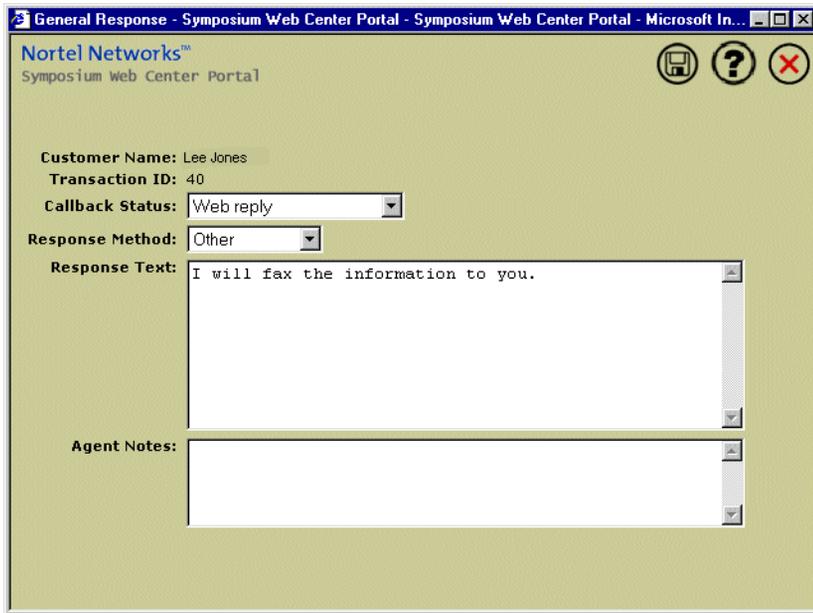
3   Update the Callback Status.

4   From the Response Method drop-down list, select the type of response (for example, Fax).

5   In the Response Text box, type a summary of the response.

　　　　Note: The information in the Response Text box is seen by the customer.

6   In the Agent Notes box, type information about the transaction or the customer.

　　　　Note: The information in the Agent Notes box is seen only by agents and supervisors. The customers cannot see the information in this box.

7 Click the Save icon .

   Result: The General Response window closes.

Transaction status

You can change the status of the Symposium Web Center Portal transactions to one of the following choices:

- Pending – Transactions that you viewed and worked on but have yet to complete. This is the default status for all transactions that are not closed.
- Closed – Transactions that you completed.
- New Reply – Transactions that were de-assigned by a supervisor.

To change the transaction status

1 Double-click the transaction.

   Result: The Transaction Detail window opens.

2 From the Targeted Status menu, choose the appropriate status.

3 Click the Save icon.

4 Click the Exit icon.

To transfer transactions to another skillset

1   Double-click the transaction.

2   Click the Transfer Transaction icon to open the Transfer Transaction window.

      Result: The Transfer Transaction window appears.
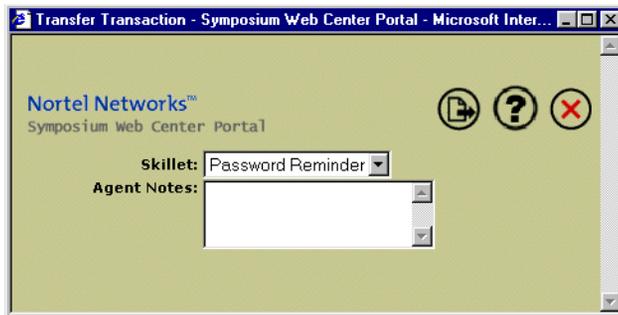
3   From the Skillset drop-down box, select the skillset to which you want to transfer this transaction.

4   In the Agent Notes box, type a brief note about the reason for the transfer.

5   Click the Transfer icon to transfer the transaction.

      Result: The transaction is transferred, and the Transfer Transaction window closes.

To close transactions

1   Double-click the transaction.

2   In the Transaction Detail window, change the status to Closed.

3   Click the Save icon.

To open a closed transaction

If a customer requests more information about his or her transaction that was previously closed, the agent can open the closed transaction. When the transaction is reopened, it is automatically assigned to its original skillset. Once the transaction is opened, the agent can go back and respond to the customer's request.

1   Double-click the transaction.

     Result: The Transaction Detail window appears.

2   In the Status box, select Pending.

3   Click the Save icon.

     Result: The transaction is assigned to its original skillset and appears on the Agent Workbook with the status listed as Pending.

Working with e-mail

Introduction

Follow the procedures in this section to send e-mails with attachments, and use e-mail templates.

For more information about sending e-mails, refer to "To reply to a customer request by e-mail" on page 38.

To add an attachment to an e-mail message

1 In the Symposium eMail Manager window, create your e-mail message.

2 Click the Browse files to attach icon or the Browse button to find the file you want to attach to the e-mail.

3 Select the file you want to attach, and then click Open.

Result: The path and the name of the file appear in the Selected Attachment box.

4 Click the Attach selected file icon to attach the file to the e-mail.

Result: The name of the file appears in the Attachment List box, and a dialog box appears indicating that the file was attached successfully.

Note: Based on the size of the attachment, this step may take several seconds. You cannot send the e-mail until the file is successfully attached.

5 Repeat steps 2 to 4 for each file that you want to attach to the message.

6 When you are ready to send the e-mail message and attachment to the customer, click the Send icon .

To create templates for responses

1 Create the e-mail message in a text editor, such as Notepad.

2 Click Save As.

3 Navigate to the folder where you want to store the template response file.

4 Save the file using a descriptive name (for example, WarrantyURL.txt).

To use a template response

1   Create the e-mail message.

2   Click the Open Template icon to open a template.

3   Navigate to the folder where your template response is stored.

4   Select the template file, and then click Open.

   Result: The text from the template appears in the eMail Body box.

   Note: For this feature to work, you must enable a security setting on your Web browser. Locate your *ActiveX controls and plug-ins* settings. For the *Initialize and script ActiveX controls not marked as safe* option, select Enable or Prompt.

5   If necessary, edit the text.

6   When you are ready to send the e-mail message with the template, click the Send icon .

Viewing and updating customer information

Introduction

Follow the procedures in this section to update customer information and to view the customer's history.

To update customer data

1   Double-click the transaction.

2   Click the Display Customer Details icon 🛈 to open the Customer Details window.

   Result: The Customer Details window appears.

3   Make the required changes to the customer's record.

4   Click the Save icon 🖫 .

   Result: The Customer Details window closes.

To view the customer history

1   Double-click a transaction.

      Result: The Transaction Detail window appears.

2   Click the Display Customer Details icon ⊕ to open the Customer Details window.

3   Click the Display customer transaction history icon ⊕ to list the transaction history for the customer.

      Result: The Search Results window appears.

Viewing skillset statistics

Introduction

You can view skillset statistics for your transactions on the Skillset Count window. The Skillset Statistics window allows you to view the threshold and count for skillsets for which the Display feature is enabled.

The threshold is set by the administrator when the skillset is created. The Count is the number of new transactions assigned to the skillset. If there are no new transactions for the skillset, the skillset does not appear in the list on the Skillset Count window.

The Skillset Count window is dynamic. You can leave the window open or minimize it while you are processing transactions to track the transactions for your skillsets.

To view skillset statistics

On the toolbar, click Agent → Statistics.

 Result: The Skillset Count window appears.
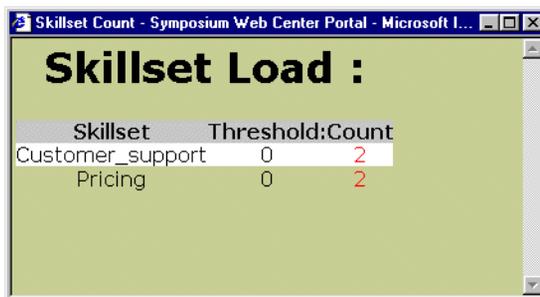
Performing Supervisor tasks

Introduction

The supervisor oversees agents in the call center. When you log on as a supervisor, you can log agents off the system and reassign transactions when necessary, add new agents, and assign agents to skillsets.

When you log on as a supervisor, you cannot process transactions; however, you can view all the transactions sent to the call center, the agents assigned to the transactions, and the status of the transactions. You can also generate reports on the skillsets and agents. For more information, see the *Symposium Web Center Portal Installation and Administration Guide*.

Managing agents

Introduction

Follow the procedures in this section to create user names and passwords for agents and to assign skillsets to agents. You perform the procedures in this section on the Symposium Web Center Portal Administrator. For more information, refer to the *Symposium Web Center Portal Installation and Administration Guide*.

To add agents

1   Log on to Symposium Web Center Portal Administrator.

2   Click the plus sign (+) next to Symposium Web Center Portal.

3   Click the plus sign (+) next to User/Customer Administration.

4   Double-click Users.

   Result: The Users window appears.
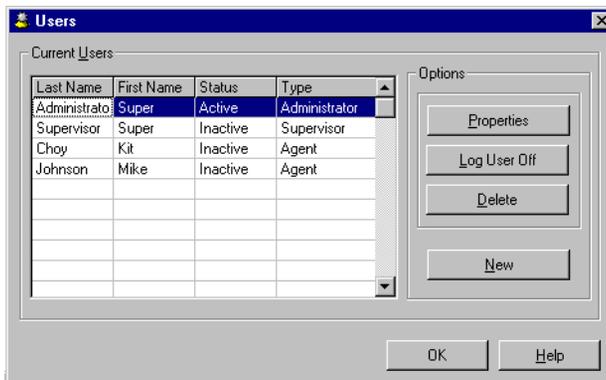
5   Click New.

6   Enter the new agent's identification and contact details.

7   Click the Skillset tab.

8   Select the skillset(s) to which the agent belongs, and then click the arrow to move the skillset(s) to the Selected Skills box.

9   Click the Display tab.
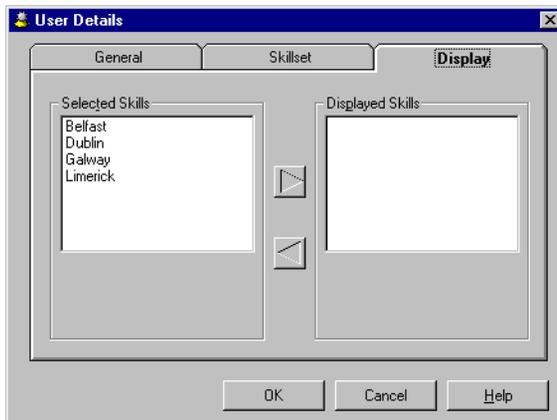
10 Select the skillset(s) that you want to appear on the agent's Skillset Count display, and then click the arrow to move the skillset to the Displayed Skills box.

11 Click OK.

To assign agents to skillsets

1 Log on to Symposium Web Center Portal Administrator.

   Result: The Symposium Web Center Portal - Administration window appears.

2 In the Symposium Web Center Portal - Administration window, click the plus sign (+) next to Symposium Web Center Portal.

3 Click the plus sign (+) next to User/Customer Administration.

4 Double-click Users.
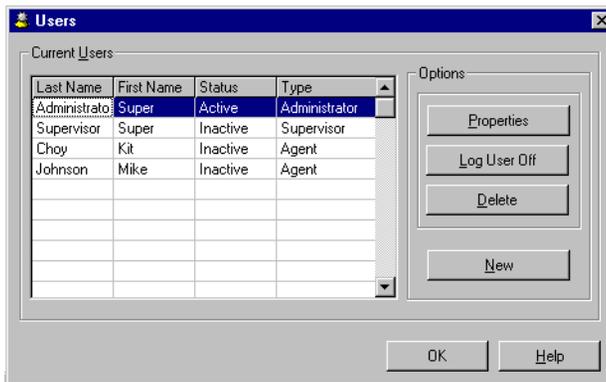
5 On the Current Users list, select the agent you want to assign to a skillset.

6 Click Properties.

7 Click the Skillset tab.
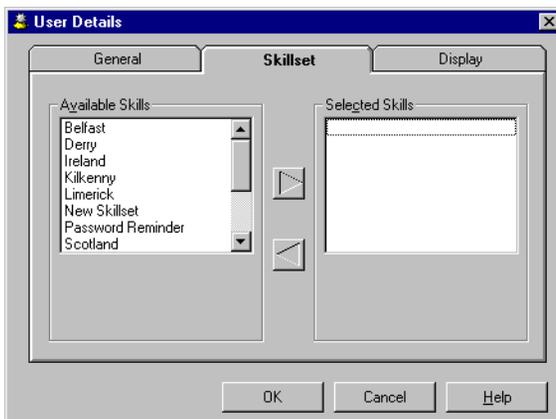
8   In the Available Skills box, click the skillset to which you want to assign the agent.

9   Click the right arrow to move the skillset to the selected skills box.

10   Click OK.

To change agent properties

1   Log on to Symposium Web Center Portal Administrator.

2   Click the plus sign (+) next to Symposium Web Center Portal.

3   Click the plus sign (+) next to User/Customer Administration.

4   Double-click Users.

5   Select the agent whose properties you want to change.

6   Change the General, Skillset, and Display properties as required.

7   When you are finished, click OK.

To delete an agent

When you delete an agent, you permanently remove him or her from Symposium Web Center Portal. The process of creating another user with the same information as the agent you deleted from Symposium Web Center Portal does not restore the agent's information. Symposium Web Center Portal creates a unique user ID for every agent added.

Note: When closed transactions for the deleted agent appear on the Agent Workbook, they are listed as having an Undefined Agent ID.

Before you delete an agent, ensure that all transactions belonging to that agent are reassigned. (See "To reassign transactions" on page 60.)

1   Log on to Symposium Web Center Portal Administrator. If you want to delete an administrator or supervisor user ID, you must log on with administrator permissions.

2   Click the plus sign (+) next to Symposium Web Center Portal.

3   Click the plus sign (+) next to User/Customer Administration.

4   Double-click Users.

5   Select the agent that you want to delete.

6   Click Delete.

7   Confirm that you want to delete the selected user.

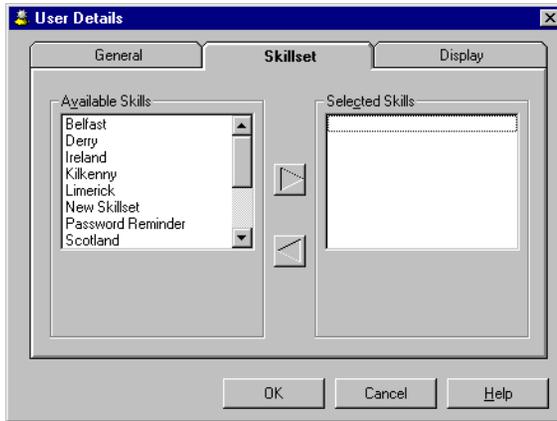## To view an agent's status

1   Log on to Symposium Web Center Portal Administrator.

2   Click the plus sign (+) next to Symposium Web Center Portal.

3   Click the plus sign (+) next to User/Customer Administration.

4   Double-click Users.

Result: The Status column displays whether agents are currently active or inactive.

To change an agent's password

1   Log on to Symposium Web Center Portal Administrator.

2   Click the plus sign (+) next to Symposium Web Center Portal.

3   Click the plus sign (+) next to User/Customer Administration.

4   Double-click Users.

5   Select the agent whose password you want to change.

6   Click Properties.

Result: The User Details window appears.

7   In the Password box, enter the new password.

Note: For security reasons, asterisks replace the password characters as you type.

8   Click OK.

Logging agents off Symposium Web Center Portal

Before you begin

Before you can log agents off Symposium Web Center Portal, you must verify the status of any transactions that the agent was working on. You must reassign any pending transactions.

To reassign transactions

1   On the Agent Workbook, double-click the transaction.

    Result: The Transaction Detail window appears.

2   In the Status box, select New Reply.

3   Click the Save icon.

    Result: The transaction appears on the Agent Workbook with a status of New Reply. Another agent can now open the transaction.

To log agents off Symposium Web Center Portal

1   Log on to Symposium Web Center Portal Administrator with supervisor privileges.

    Result: The Symposium Web Center Portal - Administration window appears.

2   Click the plus sign (+) beside Symposium Web Center Portal.

3   Click the plus sign (+) beside User/Customer Administration.

4   Select the agent you want to log off.

5   Click Log User Off.

    Result: The Logout Confirmation dialog box appears.

6   Click Yes.

    Result: The agent is logged off the Symposium Web Center Portal system.

Section B: Using the Web Communication Manager

In this section

Overview

Introduction

The Web Communication Manager is a group of features that allows an agent to communicate with a customer over the Internet. The Web Communication Manager includes the following features:

■ Text chat – Allows an agent and customer to conduct a two-way conversation by typing on the computer keyboard.

■ Page push – Allows an agent or a customer to push web pages to each other's browser.

■ Form sharing – Allows agents and customers to edit HTML forms together.

■ Click stream tracking – Tracks users as they browse the company web site. Agents can view the list of visited URLs to understand the information the customer is seeking.

■ Web on hold – Provides a predefined multimedia presentation to the customer's browser while the customer is waiting for an agent to become available.

ATTENTION
The Web Communication Manager requires that both the agent's and the customer's web browsers can work with JavaScript and frames. Netscape 4.7 or higher and Internet Explorer 5.0 or higher are acceptable browsers for the customer.

Micro-browsers, such as those available for Win CE 2.0, are not supported because they do not support JavaScript as of this document's release date.

Initiating a web communication session

Introduction

A web communication session can be initiated in three different situations:

- The customer requests a web communication session with an agent by clicking an icon or link on a web page.

- The agent is engaged in a telephone transaction with a customer and requests the customer to join a web communication session.

- The agent is engaged in a telephone conversation with a customer that is independent of any Symposium Web Center Portal web interface activity; that is, a transaction has not been initiated. The agent must open a new transaction before requesting the customer to join the web communication session.

The following sections describe the sequence of events in each of these situations and provide instructions for the agent.

Customer-requested web communication session

The customer performs the following procedure to request a web communication session.

To request a web communication session with an agent

1 The customer clicks a link or icon on the web site.

   Result: Symposium Web Center Portal displays a form from which the customer selects the appropriate skillset.

2 The customer enters user registration information, if required, and selects how he or she wants to communicate—callback, chat, e-mail, or fax.

   Note: If the customer chooses the chat option, Symposium Web Center Portal ensures that there are agents logged on for that skillset, and then puts the customer on Web On Hold, if configured for that skillset. For more information, see "About Web On Hold" on page 78.

To respond to customer-requested Web Communication

1   When the notification appears, click Accept to accept the transaction, or select the transaction from the list of transactions.

For information on selecting a transaction, see "To view information about an existing transaction" on page 33.

2   Click the Start the Web Communication Manager icon .

Result: The Symposium Web Communication Manager windows appear on the agent's and customer's screens.

Agent-requested web communication session in an existing transaction

In this situation, the agent has already established a Symposium Web Center Portal telephone transaction with the customer. This can happen either when the customer calls the site first, or the agent calls the customer as a result of a callback request or scheduled callback.

In the course of the conversation, the agent and the customer decide that they need a web communication session.
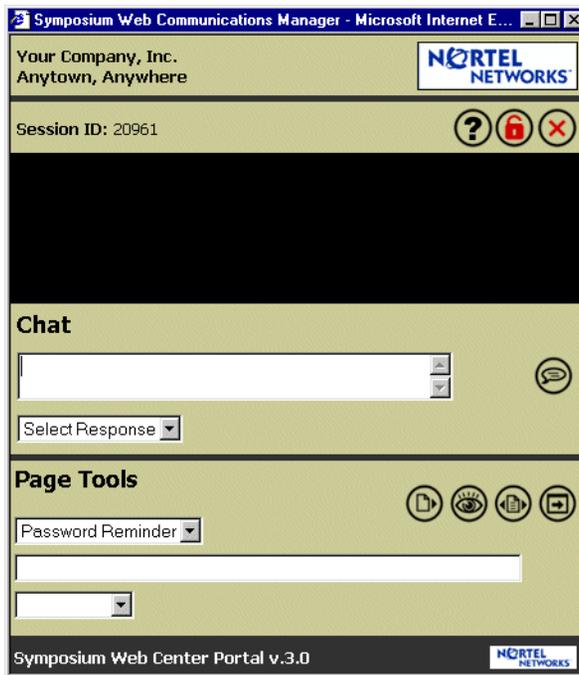
To initiate a web communication session

1   When the notification appears, click Accept to accept the transaction, or
select the transaction from the list of transactions.

2   Click the Start Web Communication Manager icon .

Result: The agent's Symposium Web Communications Manager window
appears.

3   Over the telephone, ask the customer to enter the Web Communication Manager Join URL.

Result: The customer types the URL into the location or address box in his or her browser, and then presses Enter. The Web Communication Manager Join window appears on the customer's screen.

4   Over the telephone, give the Session ID number to the customer, and ask the customer to complete the Web Communication Manager Join window.

Note: The Session ID number appears at the top of the chat text frame in the Symposium Web Communications Manager window. The Session ID number comprises the Transaction number plus a randomly generated four-digit number for the Web Communication Manager.

Result: When the customer submits the Session ID number, the Symposium Web Communications Manager window appears on the customer's screen.

Agent-requested web communication session with a new transaction

In this situation, the agent and customer are engaged in a telephone conversation that is not the result of any Symposium Web Center Portal web interface activity, such as a customer-submitted e-mail or web form.

In this case, the agent must open a new transaction before the Web Communication Manager can be initiated.

To open a new transaction for web communication session

1   Open another browser window and go to the URL that has the customer web form.

2   Complete the customer information, enter a skillset for which only this agent is a member, and then submit the transaction.

3   On the Agent Workbook window, refresh the transaction.

Result: The new transaction appears in the Symposium Web Center Portal window.

4   Open the new transaction, and then click the Start Web Communication Manager icon.

Result: The Symposium Web Communications Manager window appears.

5   Over the telephone, ask the customer to go to the specific URL.

Result: The customer types the URL into the location or address box in his or her browser, and then presses Enter. The Web Communication Manager Join window appears on the customer's screen.

6   Over the telephone, give the session ID to the customer, and ask him or her to complete the Web Communication Manager Join window.

Note: The session ID appears at the top of the chat text frame in the Symposium Web Communications Manager window.

Result: When the customer submits the transaction and agent ID numbers, the Symposium Web Communications Manager window appears on the customer's browser.

Understanding the Symposium Web Communication Manager window

Introduction

The following example illustrates the agent's Symposium Web Communications Manager window:
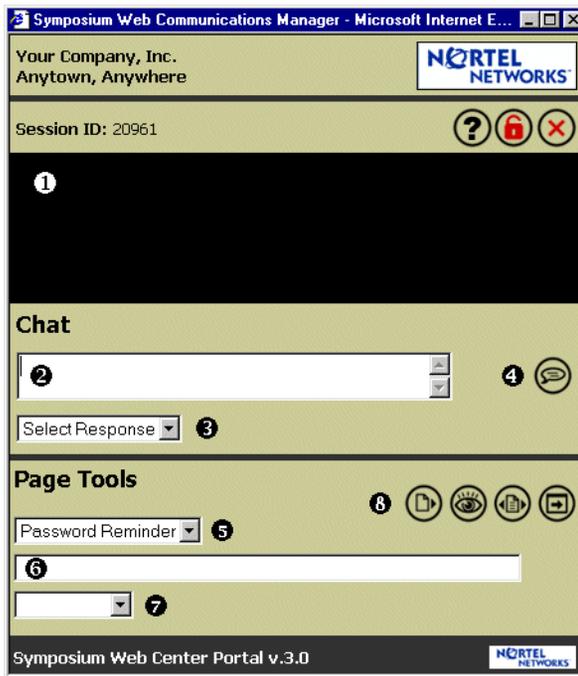
1   This area shows a record of the text and URLs exchanged by the agent and the customer.

2   Use this area to type the text of a message to the customer.

3   Select a prepared response from the drop-down list box. The text appears in the area above.

This box does not appear on the customer's Symposium Web Communications Manager window.

4   This is the Send icon. Click the Send icon to send the text in the Chat box to the customer.

5   Select a skillset from the drop-down list box. Only URLs applicable to this skillset appear in the URL menu (7).

      Note: This box does not appear on the customer's Symposium Web Communications Manager window.

6   Use this area to type an ad hoc URL to send to the customer.

7   Select a predefined URL from the drop-down list box.

      Note: This box does not appear on the customer's Symposium Web Communications Manager window.

8   The following list describes the page tools icons:

 Push page icon – Pushes the selected URL to the customer's browser.

 Preview page icon – Displays the page associated with the URL in a separate browser window.

 Share form icon – Pushes a form with data entered into it to the customer.

 Push Displayed page icon – Pushes the page displayed in your browser window to the customer.

Note: The customer's Symposium Web Communications Manager window does not include the list of predefined responses under Chat, nor the skillset and URL lists under Page Tools.

Using Text Chat

Introduction

Text Chat allows an agent and a customer to communicate with each other using text entered at the keyboard.

The Text Chat frame shows the complete record of the conversation. Although only four or five lines of text are visible in the frame, you can scroll the frame up or down to view the entire text. This area also shows the URL of any pages pushed by the agent or the customer.

To use Text Chat

1 In the Chat box on the Symposium Web Communications Manager window, type the text of your comments to the customer.

Note: You can review your comments before sending them. If necessary, use the scroll bars to view the complete text.

One line of Text Chat has a maximum length of 1054 characters.

2 To send your comments, click the Send Message icon.

Result: Your name or agent ID appears in the Text Chat frame, followed by your comments.

Your customer's reply appears in the Text Chat frame, prefixed by the customer's name.

3 To add a predefined response, in the Chat section, select a response from the drop-down list box.

Result: The text of the response appears in the text box. If necessary, you can edit the text.

4 To send the predefined response, click the Send icon.

5   To end the Text Chat session, click the Quit icon.

Result: Based on how the Text Chat options have been set by the administrator during the installation and setup, one or both of the following events can occur:

- The chat log is saved in the database.

- The chat log is e-mailed to the customer.

Working with multiple chat sessions

You can have more than one web chat session open, but each session appears in a separate window with its own Symposium Web Communications Manager window.

To manage several concurrent chat sessions, Nortel Networks recommends that your PC monitor meet the following requirements:

- 19-inch screen

- 1280 x 1024 resolution

- 72 Hz refresh rate

- 65 000 colors or 16 bit

For multiple transactions to be pushed by your PC, your administrator must set the Dynamic Transaction Handler (DTH) parameters to Drop Mode.

Note: You must also manually deactivate Not Ready when you are ready for another transaction.

Using Page Push

Introduction

Page Push allows an agent or customer to push a web page to the other's browser.

The following types of web pages can be pushed:

- static pages (URLs ending in .htm or .html)
- dynamic pages (URLs ending in .asp)
- secure pages (URLs beginning with https://)

Limitations of Page Push

Some web pages may not appear the same when pushed to the other person's browser. For example, with personalized web pages that can be customized for the user's choice of stocks, weather, and news, customers and agents each see their own version of the page.

Dynamic pages that are customized through the use of cookies may appear differently on the agent's and customer's browsers because they have their separate cookies. Cookies are never shared by agents and customers.

Framed pages cannot be pushed completely. The URL defining the frameset is pushed, but the individual URLs in each frame are not pushed.

Note: After a page is pushed, if either the agent or customer follows a link to another page, the other person does not see that change.

Selecting a web page to push to a customer

There are three ways you can select a page to push to a customer. You can

- select a URL from a list of predefined URLs associated with a skillset
- type an ad hoc URL into the text box
- if the page is already displayed in your browser, click the Push Displayed page icon

To select a predefined URL

1   In the Page Tools frame of the agent's Symposium Web Communications
       Manager window, select a skillset from the skillset drop-down box.

2   From the URL drop-down box, select the URL.

       Result: The selected page appears in the main browser, and the URL
       appears in the Page push text box.

3   To push the page to the customer, click the Push page icon.

       Result: The page is pushed to the customer's browser. The URL is added
       to the chat log.

To enter an ad hoc URL

1   In the Page Tools frame of the agent's Symposium Web Communications
       Manager window, type the URL in the page push text box.

2   To preview the web page before pushing it to the customer, click the
       Preview page icon.

       Result: The selected page appears in the main browser.

3   To push the page to the customer, click the Push page icon.

       Result: The page is pushed to the customer's browser. The URL is added
       to the chat log.

To push a page already displayed on your browser

If the page that currently appears in your main window is from the same web
server as the page push component, click the Push Displayed page icon.

Result: The page is pushed to the customer's browser. The URL is added to the
chat frame, as well as to the chat log.

Notes:

■   If the displayed page is not from the Symposium Web Center Portal
    external web server, an error message appears if the page is pushed. To
    push this page, copy the URL to the page push text box in the Symposium
    Web Communications Manager window, and then click the Push page icon.

■   To push a secure page, type the URL in the page push text box in the Symposium Web Communications Manager window. Click the Push page icon or type the URL, and then click Review. You can push secure pages using the Push Displayed page icon, provided the pages remain secure.

For more information, see "Pushing secure pages" below.

Pushing pages at the same time

If the agent and customer click the Push Page icon at approximately the same time, they both see the form that was pushed last. However, both URLs appear in the Text Chat log.

Comparing web pages

If the customer pushes more than one page to you (or you push several pages to the customer), only the most recent page shows in your browser window.

To compare web pages

To compare this page with one sent previously, click the URL of the comparison page in the Chat area.

Result: The page opens in a new browser window.

Pushing secure pages

The security icon in the Symposium Web Communications Manager window indicates whether the web page that currently appears is secure:

     ■ Secure

     ■ Not secure

The security status is updated when either the agent or the customer selects a URL and pushes the page to the other person. When the pushed page loads in the browser, the Web Communication Manager software checks if there has been a change in the security and, if necessary, updates the security icon.

When both the agent and customer Symposium Web Communications Manager windows show the locked icon, then

■   both the agent and the customer can share forms

■   Text Chat is sent securely

■   you can use the Push Displayed page icon for a secure page

The default option of the browser usually warns the user of a security change, whenever it occurs.

To check the security certificate

The agent or customer can examine the SSL certificate by following these methods:

■   On the Symposium Web Communications Manager window, right-click and select Properties (Internet Explorer) or View Info (Netscape).

■   On the Web Communications Manager window, click the lock icon in the status bar at the bottom of the browser.

To chat in secure mode

If you or the customer need to communicate confidential information through Text Chat, first push any secure web page, which initiates the secure mode.

Ensure that the Security icon is locked before sending the confidential information.

Sharing forms

Introduction

A customer can request help from an agent to fill in a web-based form downloaded from the Symposium Web Center Portal site. Once in a session, either the customer or the agent can push the form to the other's browser. The agent and customer can complete parts of the form and push the data to the other person.

To share forms

This procedure assumes you have downloaded the form and established a session with the customer.

Note: This procedure is written for the agent; however, you can instruct the customer to do the same actions.

1   Push the form to the customer, or ask the customer to push the form to you by following one of these methods:

- Enter the URL, and then click the Push page icon.

- Click the Push Displayed page icon.

  Note: You must push the form with the Push page icon before you can use the Share Form icon.

2   Take turns, if necessary, to complete parts of the form, and click the Share Form icon to push the filled form to the other person.

  Note: If the agent and customer click the Share Form icon at approximately the same time, they both see the form that was pushed last. To prevent this from happening, use the Chat section of the Symposium Web Communications Manager window or telephone to coordinate your actions with the customer.

Sharing secure forms

If you want to share secure forms, you must type the URL of the secure form in the URL box, and then push the form to the customer.

About click stream tracking

Introduction

When a customer browses the web site, click stream tracking compares the browsed URL with a set of predefined URLs. If it matches, click stream tracking saves the matching URL, its description, the URL page's title, and the time it was tracked to a temporary log file.

If the customer opens a customer service page, fills out a form, and submits a request, the tracking information, along with the request, are saved in the Symposium Web Center Portal database.

Note: Cookies must be enabled on the customer's web browser for click stream tracking to work.

If you want to see which services and products site the customer has looked at on the web, you can view the tracking information in the Customer Inquiry Page. Your company can also use the information for data mining, generating analytical reports, skill-based routing, and integration with other customer relationship management applications.

To view the Customer Inquiry page

1   Ensure that the customer's transaction is highlighted, and then click the Open Selected Transaction icon.

2   In the Transaction Detail window, click the Click Stream Inquiries icon.

Result: The Customer Inquiry page appears.
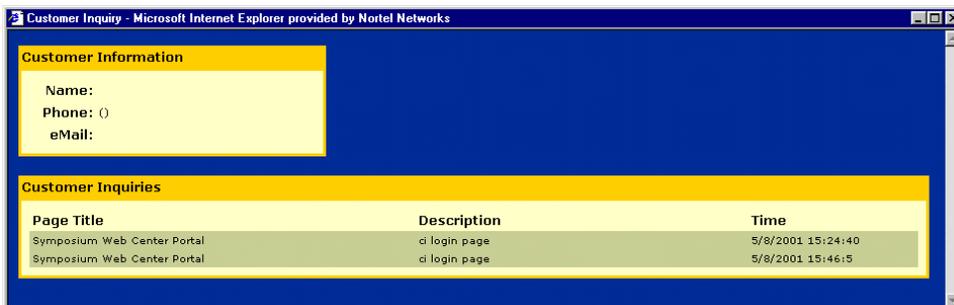
About Web On Hold

Introduction

Web On Hold is a feature designed to keep the customer's interest while he or she waits for an agent to become available.

It is basically a sequence of URLs that are presented automatically to the customer's browser. It can include multimedia, such as video clips or audio files, provided the customer's browser supports these formats.

Web On Hold opens in a new browser window. The customer can continue to use his or her main browser while waiting for an agent to become available.

Web On Hold starts when the customer requests a text chat session. Web On Hold for the requested skillset cycles through the sequence of URLs until an agent opens the transaction and clicks the Start Web Communication Manager icon, or the Web Communication Manager Expiry timer times out. If the timer times out, the session is closed.

The system administrator is responsible for setting up and maintaining Web On Hold.

Note: If Web On Hold is not defined, then the customer sees a standard HTML page that says "Please wait for agent."

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NORTEL NETWORKS™

Reader Response Form

Nortel Networks Symposium Web Center Portal
Product release 3.0
User Guide for Agents and Supervisors

Tell us about yourself:

Name: _____

Company: _____

Address: _____

_____

Occupation: _____ **Phone:** _____

---

1. What is your level of experience with this product?

    ☐ New user   ☐ Intermediate   ☐ Experienced   ☐ Programmer

2. How do you use this book?

    ☐ Learning   ☐ Procedural   ☐ Reference   ☐ Problem solving

3. Did this book meet your needs?

    ☐ Yes   ☐ No

    If you answered No to this question, please answer the following questions.

4. What chapters, sections, or procedures did you find hard to understand?

    _____
    _____
    _____

5. What information (if any) was missing from this book?

    _____
    _____
    _____

6. How could we improve this book?

    _____
    _____
    _____

    Please return your comments by fax to 353-91-756050, or mail your comments to
    Nortel Networks, Mervue Business Park, Galway, Ireland.

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Reader Response Form

Nortel Networks Symposium Web Center Portal
User Guide for Agents and Supervisors

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