Web Services and Applications Configuration Guide

Setting Up Supervisors On The System

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After you have created Agent objects you can set up your agents and supervisors to use different features and functionality. The following procedures assume that you know how to use the Genesys Administrator Extension application to configure agent objects.

Defining a User as a Supervisor

Purpose: To set up an agent as a supervisor. You can also define a user as an agent group supervisor.

Prerequisites

- A working knowledge of Genesys Administrator Extension.
- A `WS_Cluster` object exists in the Configuration Database.

Start

1. In the configuration layer, by using Configuration Manager or Genesys Administrator Extension, specify that the user type is `Supervisor`. In the annex of the person object, in the `htcc` section, specify the values `Supervisor,Agent` for the `roles` option.

End

Defining a User as an Agent Group Supervisor

Purpose: To set up an agent as a supervisor for one or more agent groups.

Prerequisites

- A working knowledge of Genesys Administrator Extension.
- A `WS_Cluster` object exists in the Configuration Database.

Start

Complete the steps below for each agent group you want the user to supervise:

1. In the configuration layer, use Configuration Manager or Genesys Administrator Extension to select an agent group to be used to specify the list of agents that a supervisor can monitor.
2. If necessary, add the agents to be monitored to the agent group.
3. In the **Configuration** tab for the agent group, open the **Advanced** view.
4. In the **Supervisor** field, add the name of the user that will be acting as supervisor for that agent group.

5. Save the changes to the Agent Group object.

End

Enabling a Supervisor to Monitor Agents and Routing Points

You can enable a supervisor to use the monitoring features to Listen (Monitor Next Interaction), Whisper (Coach Next Interaction), and Barge-in (join—available as a transition from the other modes) to agent voice and chat interactions. If a supervisor is configured to monitor routing points in SIP Cluster environments, interactions routed to IVRs can also be monitored.

The following transitions are supported:

- Monitoring to barge-in.
- Coaching to barge-in (chat only).
- Coaching to monitoring (chat only).
- Barge-in to monitoring.
- End Monitoring.

Purpose: To enable a supervisor to use the monitoring features to Monitor, Coach, and Barge-in to agent voice and chat interactions.

> ### Important
>
> - Voice call monitoring is supported only for SIP Server environments
> - Route point monitoring for which calls are routed to IVR is supported only for SIP Cluster environments
> - In SIP Server environments without SIP Cluster, the supervisor is engaged only when the call is routed to an agent and the agent has answered the call

Prerequisites

- A working knowledge of Genesys Administrator Extension.
- A `WS_Cluster` object exists in the Configuration Database.

Start

1. In the configuration layer, use Configuration Manager or Genesys Administrator Extension to navigate to the annex of the person (or tenant, application, and so on) object you want to be a supervisor. In the `interaction-workspace` section, specify the value `true` for the privilege.teamlead.can-use.
2. In the same `interaction-workspace` section, you should also specify the scope of monitoring (call or agent) by using the teamlead.monitoring-scope option.

> **Important**
>
> Set the value of the teamlead.monitoring-cross-site-based-on-activity-enabled option to `true` in environments where supervisors monitor agents across multiple sites.

3. (optional) To enable a supervisor to monitor a routing point instead of a specific agent make the following configuration:
   a. Set the value of the privilege.teamlead.can-monitor-routing-point option to `true`
   b. Set the value of the teamlead.monitorable-routing-points option to a comma-separated list of names of routing points that you want the supervisor to be able to select from Team Communicator for monitoring.
   c. If you want the supervisor to be able to Barge-in on a call, set the value of the teamlead.monitoring-scope option to `call`.
4. Review the Team Lead options for more information about the privileges available for supervisors.

End

Routing Point monitoring and coaching scenarios

Routing Point monitoring and coaching is a little different than individual agent monitoring and coaching. When you monitor or coach an individual agent, you are focusing on his or her performance. This is useful for helping the individual improve their performance. Monitoring a Routing Point gives you a holistic view of how various agents are handling calls that are driven by business strategy. This will help you to better communicate the business strategy or develop training initiatives for the agents associated with the Routing Point.

> **Tip**
>
> In SIP Cluster environments, you can monitor the call when the routing point directs the call to an IVR.

The privilege.teamlead.can-monitor-routing-point option enables the possibility to monitor and/or coach calls on a Routing Point; however, you must use the monitoring and coaching privileges to specify whether monitoring, coaching, or both are permitted:

- Monitoring: privilege.teamlead.can-monitor-voice
- Coaching: privilege.teamlead.can-coach-voice (**Note:** Coaching a Routing Point or IVR is not possible.)

Here are some example configurations that enable different monitoring and coaching scenarios:

Monitor or coach a Routing Point or an agent

To enable this scenario set these configuration options as follows:

- privilege.teamlead.can-monitor-routing-point = `true`
- privilege.teamlead.can-monitor-voice = `true`
- privilege.teamlead.can-coach-voice = `true`

Monitor a Routing Point or an agent

To enable this scenario set these configuration options as follows:

- privilege.teamlead.can-monitor-routing-point = `true`
- privilege.teamlead.can-monitor-voice = `true`
- privilege.teamlead.can-coach-voice = `false`

Coach a Routing Point or an agent

To enable this scenario set these configuration options as follows:

- privilege.teamlead.can-monitor-routing-point = `true`
- privilege.teamlead.can-monitor-voice = `false`
- privilege.teamlead.can-coach-voice = `true`

Monitor or coach an agent but not a Routing Point

- privilege.teamlead.can-monitor-routing-point = `false`
- privilege.teamlead.can-monitor-voice = `true`
- privilege.teamlead.can-coach-voice = `true`