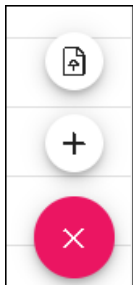


Agent screen single agent edit

Creating a New User



1. Click on the ruby + at the bottom right of screen.
2. Click on the + to manually add a new user.
3. Click on the Upward Arrow to Import new users.
4. Enter the information for a new User. Required fields are First Name, Last Name and Email Work.
5. Click Update.
6. The new agent can then be configured as below.

Agent Edit

An individual agent is selected by clicking the name of the agent.

Once an agent has been selected an edit panel appears.

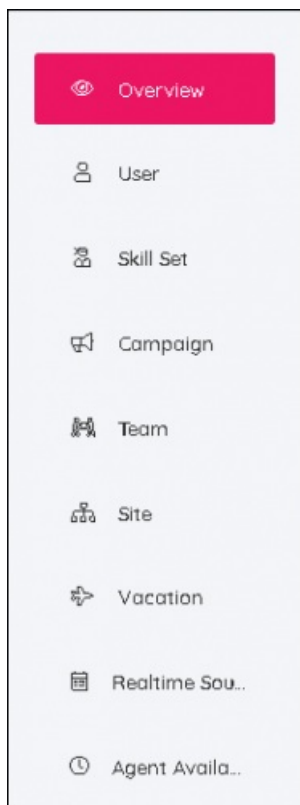
The screenshot displays the 'People' management interface. The left sidebar contains navigation options: Dashboard, Forecasting, Scheduling, Adherence, Reporting, People, Agents, Vacations, Shift Assignment, and Settings. The main area is titled 'People' and includes tabs for Agents, Vacations, and Shift Assignment. A list of agents is shown, with 'Karl Burgdorf' selected. The 'Details' panel for Karl Burgdorf is open, showing personal and HR details.

Personal Details		
Agent id 123456		
First Name *	Last Name *	Date Of Birth
Karl	Burgdorf	
Phone		Mobile
		+61 452 240474
Email Personal karlborgdorf@hotmail.com		

HR Details		
Organization	Minimum Hours	Maximum Hours
	37.5	37.5

Edit Panel

The edit panel has 9 tabs running vertically; these all correspond to different editable details of the selected agent. Click on each tab heading to change the editable fields.



Overview Tab

In this section, personal details for the employee can be added or edited. This includes HR & Contract information such as Min/Max hours for how many hours an employee should work each week.

Overview

User

Skill Set

Campaign

Team

Site

Vacation

Realtime Sou...

Agent Availa...

Details

Personal Details

Agent Id123456

First Name *Karl

Last Name *Burgdorf

Date Of Birth

Phone

Mobile+61 452 240474

Email Personalkarlburgdorf@hotmail.com

HR Details

Organization

Minimum Hours37.5

Maximum Hours37.5

User Tab

The user name of the agent can be changed, a locked out account can be unlocked, roles can be added or removed, campaign permissions can be added as Read Only or Read/Write, permissions can also be removed.

Passwords can also be reset by clicking on the Reset Password button. A random password will be auto generated.

Skillset Tab

This tab allows the editing of Skill Sets. Existing Skillsets can have their dates changed and it is also possible to add Effective Dates for changes in Skillsets for the future. Choosing the desired Skill Set and Effective date will then show up in the agent's timeline.

Overview

User

Skill Set

Campaign

Team

Site

Vacation

Realtime Sources

Agent Availability

Skill Set

Current Or Future Assignment

SkillSet	Begin	End	Actions
Demo Sales	July 6, 2020		

New Assignment

Select Skill Set *

Begin *

Assign

Add/Edit Skills

Find A Skill...

Demo Sales

Demo Email

Use Demo Sales

Note

Choose the Skillset the users will be moving to, include the date the change is to be effective from.

Campaign Tab

Similar to Skillsets, a Campaign can be back dated or a future effective date can be added. After a new campaign and date have been selected, click Assign for it to become active.

There are 2 sliders when assigning a new Campaign. These are to be effective if adding an agent to a campaign in which the existing shifts of the agent fall outside the opening hours of the new campaign. The second slider will delete shifts from the agent if the weeks that the agent is moving to has not been scheduled.

Any shifts that are deleted from this process will be from the**start date** of the new campaign.

Overview

User

Skill Set

Campaign

Team

Site

Vacation

Realtime Sou...

Agent Availa...

Campaign

Current Or Future Assignments

Campaign	Begin	End	Actions
Puzzel WFM Team	July 8, 2019		

New Assignment

Select Campaign *

Begin *

Delete Shifts If New Campaign Opening Hours Don't Align

Delete Shifts If New Campaign Not Scheduled

Assign

Team Tab

Similar to the Skillset Tab, this screen will allow for agents to be moved teams with a start date.

Site Tab

Allows a new site to be allocated to the agent. No dates are required.

Vacation Tab

Allows the annual Vacation Allocation and Vacation Rollover date to be edited.

Schedule Tab

(To be released) Shows the schedules of the agent stacked in chronological order

Realtime Sources Tab

Allows the agent identifier used by Real Time Adherence to be edited.