Agent Management Guide

The agent management module allows managers to view agent and queue status, control agents location and function, and sign them out of the system.

<u>Table of Contents</u>

Getting started

The Agent Management page is constructed of several panels, as shown in the following image.

Follow these steps to start working with Agent Management.

1. Go to **Management > Agents Management**.
2. Select the **Unit** whose agents' activity and queue status you want to monitor. Check the **Include sub units** box in order to include data from services that belong to the selected unit's subunits.
3. Once you select a unit, the list of agents associated with it is displayed.

   Note The data on this page is updated every 15 seconds.

The data displayed for each of the agents on the list contains the agent's name, function, and location as well as an icon representing his or her status (explained on the **Agent status** section of this article).

This field shows the amount of time the agent spent in this status

Use this filter to see *All* agents on the unit agent's list or only the *Active* ones

Unit	London Clinic		▼ X ☑ Include sub units	Agent Status	Active ▼
	Name	Elapsed	Function	Location	Last Service/ Back Office Task
🔲 😊	Alice Sharon (Sharona)	>24H	Admissions	Orthopedics clinic	Admissions (505)
🔲 😠	Billies James (Admin)	>24H	Admissions	Orthopedics clinic	Admissions

Depending on the agent's status, this field shows either the name of the service the agent is serving (along with the current case number), or the back office task the agent is performing

Under the agents list, you will see updated statistic information regarding the services that belong to the selected unit. This date is displayed in real time (with up to 15 seconds delay, as explained above) therefore service and waiting times only appear when customers are waiting and being served.

These icons indicate the queue status (*Empty, Normal,* or *Busy*)

Shows the longest waiting time measured on this queue

Online Service Statistics

	Service	Waiting	Avg. Waiting Time	Max. Waiting Time	In Service	Avg. Service Time	Max. Service Time
🔲	Admissions	2	0:04:08	0:04:09	1	0:01:53	0:01:53
☐	Cardiology	0	0:00:00	0:00:00	0	0:00:00	0:00:00
🔲	Gastroenterology	1	0:01:58	0:01:58	0	0:00:00	0:00:00
🔳	orthopedics	1	0:05:54	0:05:54	0	0:00:00	0:00:00

This form is automatically updated every 15 seconds

Field color reflects whether current values exceed the thresholds for warning (yellow) and critical (red) waiting and service times set on the *Service Profile* page's *Behavior* tab

Note   The availability of the features described on this article depends on your permissions.

Top

Changing an agent's location and function

You may change an agent's location and function by following these steps.

1. Repeat steps 1-3 above.
2. Select an agent from the list by clicking the button next to his or her name. The **Location and Function** panel should now be visible. If another tab is displayed, click on the **Location and Function** header to reveal this panel.
3. You may select a readymade **Work Profile** from the available profiles list. These profiles contain a preset unit, location, and function. Otherwise you may change the agent's **Current Unit**, **Location**, or **Function** by selecting new ones from the drop down lists. The available options depend on the agent's permissions.
4. Once you are done, click the **Update** button to execute your changes.

Note

Moving the agent to another unit means you will no longer see him or her on unit agents list (unless it is a subunit of the selected unit and **Include sub units** is checked).

Top

Signing an agent out of the system

If the user you chose is signed in to the Q-Flow system, you may sign them out using the **Sign Out** tab. Follow these steps to do that.

1. Repeat steps 1-3 above.
2. Select an agent from the list by clicking the button next to his or her name.
3. Click on **Sign Out** to reveal the tab.
4. Select a **Sign Out Reason**. You may also add a free text **Description**.
5. Click the **Sign out** button. A sign out confirmation dialog will appear. Click **OK** to sign the user out or **Cancel** to abort the action.

Top

Performing a Close command

The **Actions** tab allows you to close the case the agent is currently handling or set the agent's status to Idle when no case is open. To do so, follow these steps.

1. Repeat steps 1-3 above.
2. Select an agent from the list by clicking the button next to his or her name.
3. Click on **Actions** to reveal the tab.
4. Click on the **Close** button.

Top

Sending Intercom messages to the agent

Q-Flow Intercom provides a new communications channel between agents and management, while allowing managers to limit the agents' use of the module. The **Intercom** tab allows you to send a message to the selected agent by following these simple steps. Note that this option is only available for users with appropriate permissions.

1. Repeat steps 1-3 above.
2. Select an agent from the list by clicking the button next to his or her name.
3. Click on **Intercom** to reveal the tab.
4. Type in your **Message** to the selected agent.
5. You may check **Enable Agent Response** in order to allow the agent to reply to your message. Once checked, you may also check **Required Agent Response** to force the agent to reply to your message.

6. Click on the **Send** button.
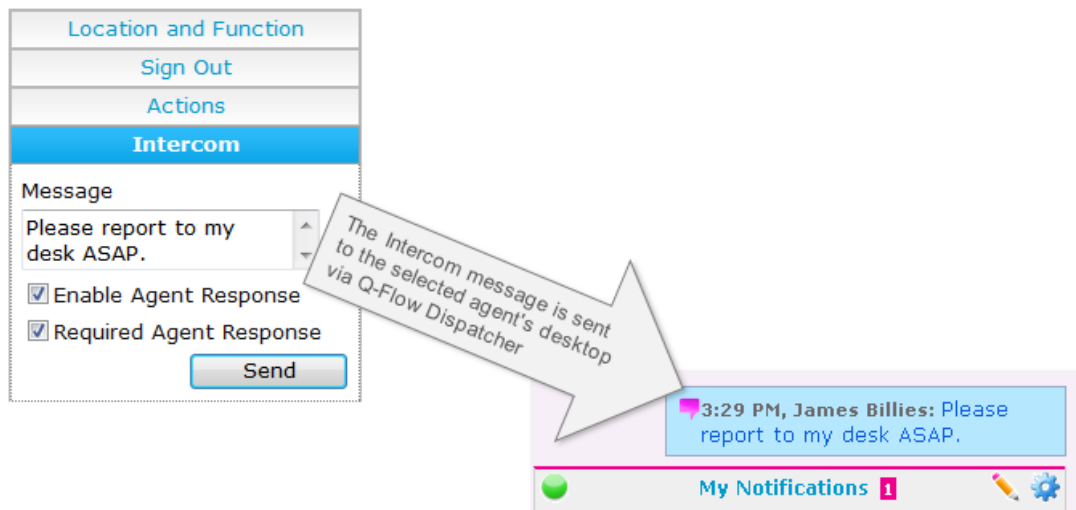
Top

Further Reading

- Detailed information on the Agent Management page fields.
- More information on Work Profiles.
- More information on Sign Out Reasons.

Top