Personnel Management

Contents

Scope:

Create a table to capture (role) hierarchy information, that will be used to populate the agent, team leader and manager lists.

This input table will generate a unique id, that will allow for changes (spelling, ect) to be made without disrupting the data already captured.

The employee id is to better identify and control the person lists for the client and allow for name changes and updates.

It also includes an email and employee id input function.

The email address is for future development that will allow the agent to give feedback via email to the app.

Access:

(until new admin permissions are implemented)

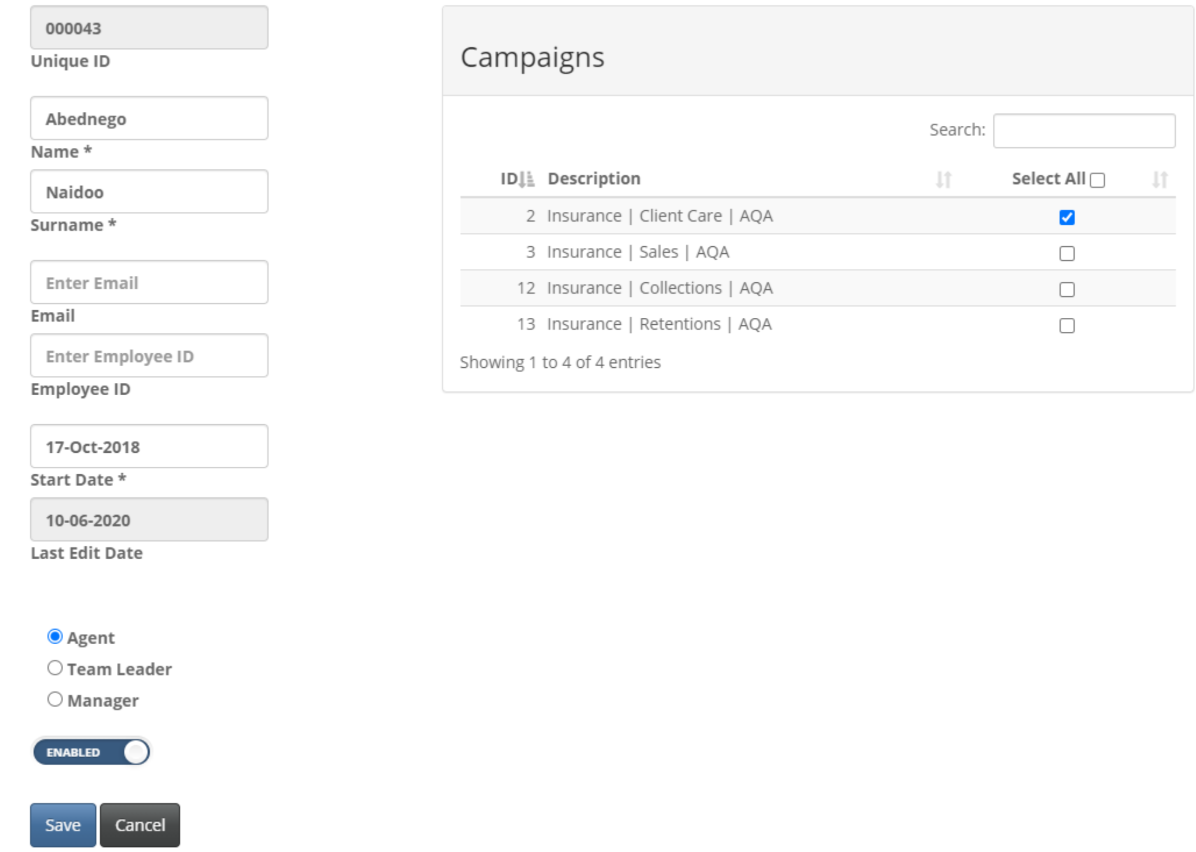
Dev Admin

System Admin

Client Admin

IA Admin

View:



General Rules:

- Input fields ie. Name, Surname, Email and Employee ID are limited to 50 characters.
- All special characters are allowed in the above fields, excluding quotations characters.
- The 26 letters of the alphabet are allowed in the name and surname fields. Also included are accents such as â, è, î, ö or ú.
- Numbers are allowed in the name and surname field. We do not recommend using numbers when creating users.
- Only one role per user, per customer (db) can be assigned per person.
- The systems will only allow for one unique Name Surname combination, ie you can’t have two or more people named Jo Soap. Such names should be individualized with a middle name / initial / nickname.

Features:

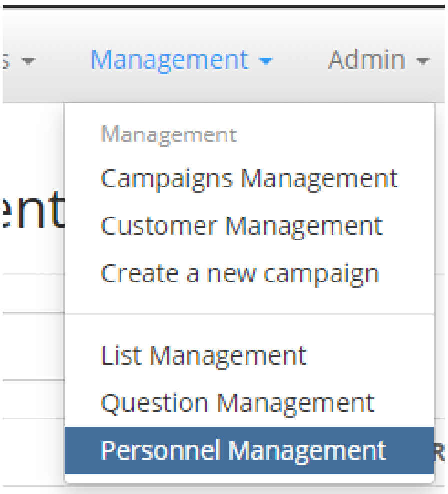
- A unique id will be allocated to each new person automatically
- Email and Employee id are non-compulsory
- Person can be allocated (assigned) to multiple campaigns per customer (db)
- Person can be disabled from list (which will remove them from their respective list, but not reporting.)
- Where name changes were done in the past, resulting in data being split, agent names can now be merged and combining the data.

Future enhancements to be spec:

- Allowing the client access to decide whether non-compulsory fields need to be made compulsory. (Per customer / db)
- Enabling the agent to add feedback via an email loop

Personnel Management View

The Personnel Management will be accessible via the Management Menu.



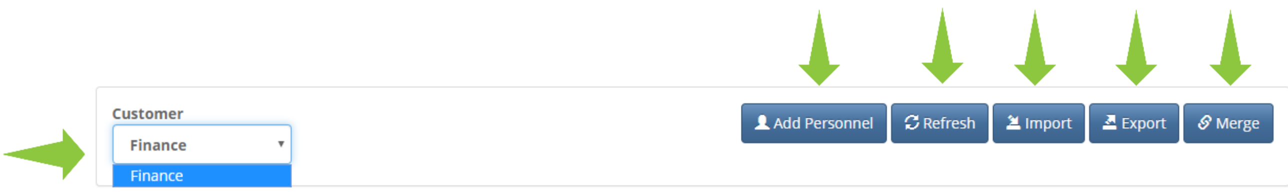
There are 2 views available as well a menu.

Views:

1. Personnel – shows indiviual personnel details
2. Campaigns – shows campaign details

Menu:

1. Customer – Will display all databases linked to the clients' app
2. Add Personnel – add single individuals' data
3. Refresh – Reloads page
4. Import – this is for bulk staff imports into a specific campaign
5. Export – allows for exporting of staff data to a .csv file from a specific campaign
6. Merge – allows for the data for two separate individuals to be consolidated. This is to resolve cases resulting from the previous list management tool. Cases resulting from names changes or spelling errors.



Personnel View: Shows the basic detail per indiviual personnel in a table format including:

1. Name
2. Surname
3. Email
4. Employee ID
5. Role (Agent, Team Leader or Manager)
6. Active (Enabled or Not)

Clicking on either the name or surname (blue script) or selecting the pencil on the right hand side of the table will allow you to edit the selected person.

There is also a delect icon on the right hand side of the table, however you will only be able to delete a person if there are no captures associated to that person.

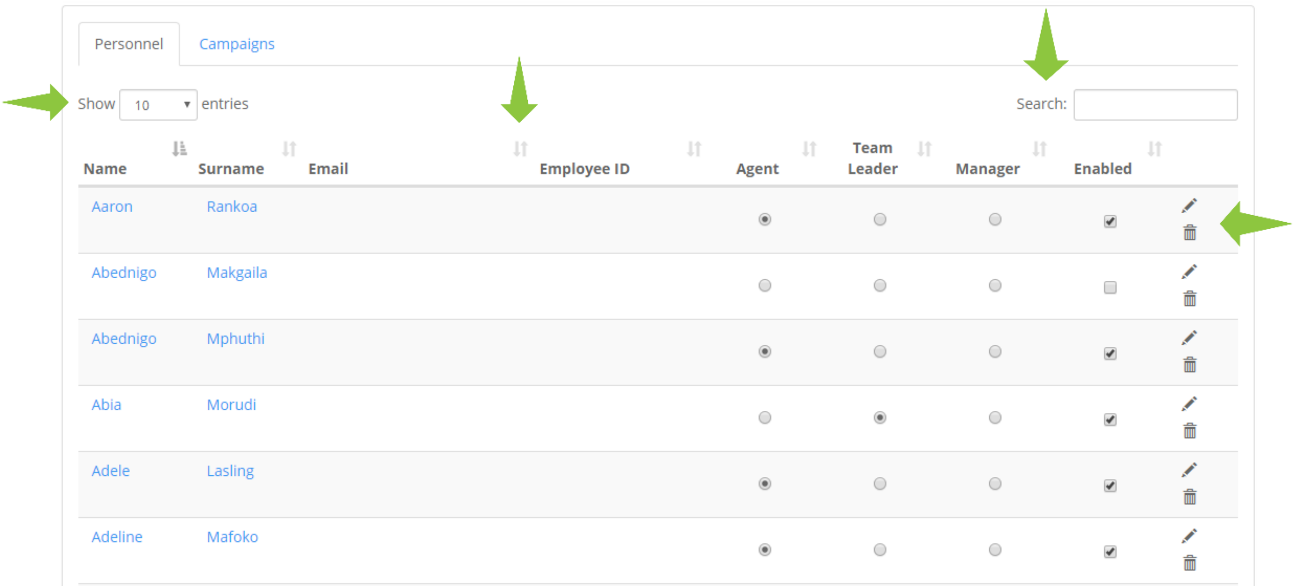
If there are captures you can remove the person from the lists by disabling that person.

All colomns are sortable using the icon located on the right hand site of the headings on the table.

There is a Search option in the top right hand corner to narrow the entries in the table.

There is also a Show option in the top left hand corner to increase the entries on the table.

This is limited to a selection of 10, 20, 50 or 100 entries.



Campaigns View: Shows the basic detail per campaign in a table format including:

1. Campaign ID
2. Campaign Name
3. Number of active persons per role (Agents,Team Leader and Managers)
4. Active lists (Agents,Team Leader and Managers)

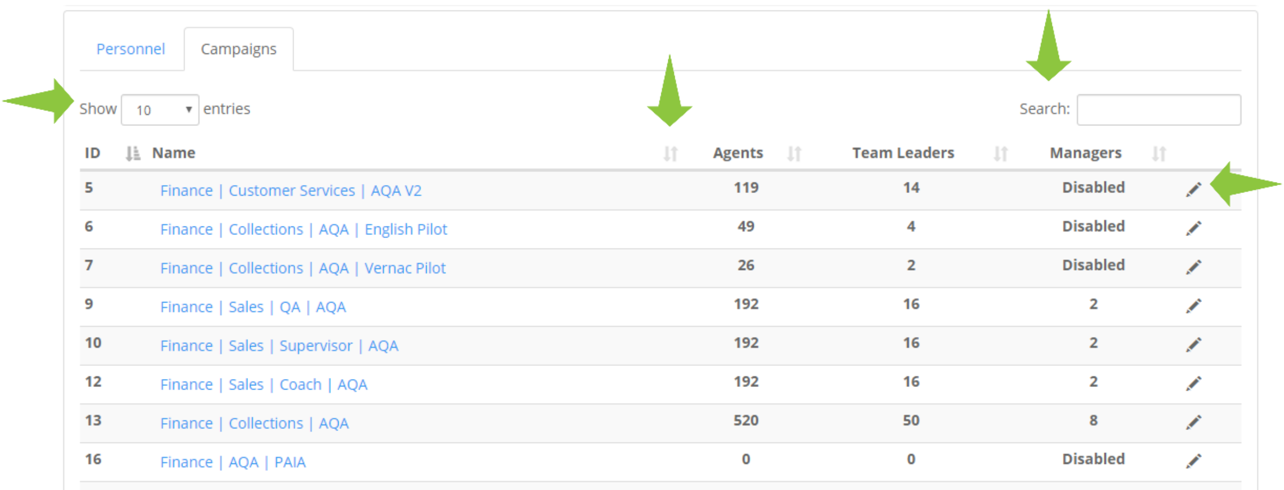
Clicking on the campaign name (blue script) or selecting the pencil on the right hand side of the table will allow you to edit the selected campaign. This is adding or removing staff from the selected campaign.

All coloms are sortable using the icon located on the right hand site of the headings on the table.

There is a Search option in the top right hand corner to narrow the entries in the table.

There is also a Show option in the top left hand corner to increase the entries on the table.

This is limited to a selection of 10, 20, 50 or 100 entries.



Personnel | Campaigns

Show 10 entries Search:

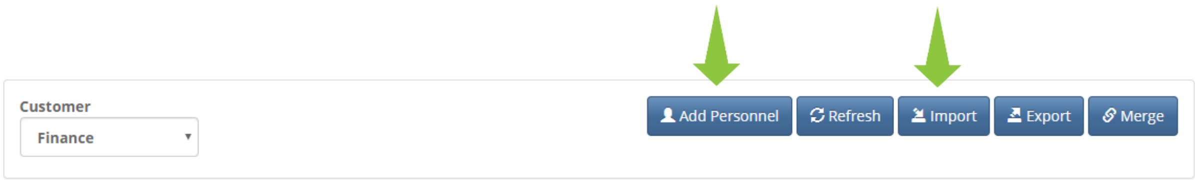
ID	Name	Agents	Team Leaders	Managers	
5	Finance | Customer Services | AQA V2	119	14	Disabled	
6	Finance | Collections | AQA | English Pilot	49	4	Disabled	
7	Finance | Collections | AQA | Vernac Pilot	26	2	Disabled	
9	Finance | Sales | QA | AQA	192	16	2	
10	Finance | Sales | Supervisor | AQA	192	16	2	
12	Finance | Sales | Coach | AQA	192	16	2	
13	Finance | Collections | AQA	520	50	8	
16	Finance | AQA | PAIA	0	0	Disabled	

Add Personnel

Adding personnel can be done in two ways

1. Individual personnel can be added
2. Bulk updates can be done

Both function are accessable using the menu in the Personnel Management



Adding Individual Personnel

Select the Add Personnel button.

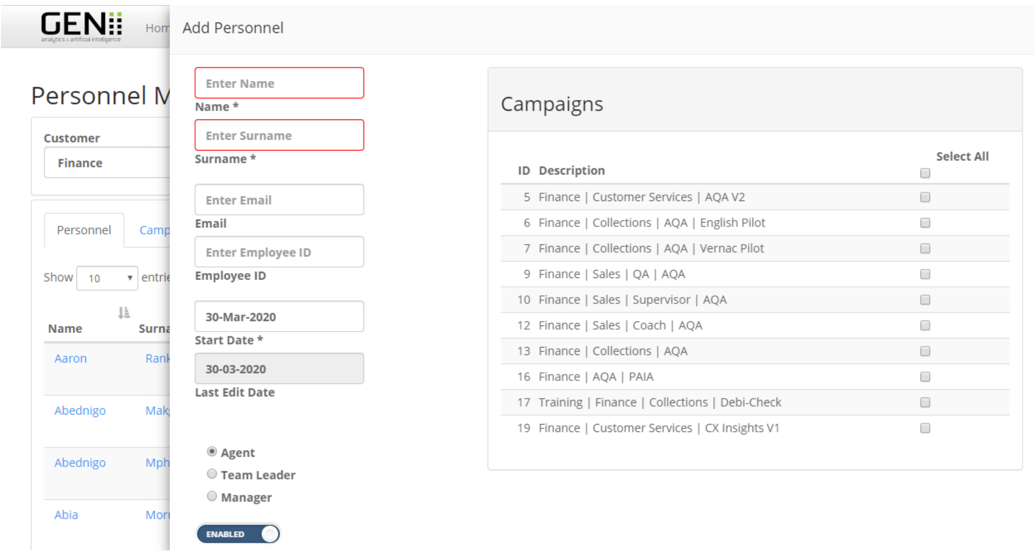
A side window will pop-up.

Name and Surname fields are compultory. When they are empty as in the screen shot below, they will be encircled by red to indicate this condition.

The Employee ID is you company's allocated ID and not the unique id that will be allocated for this system.

Start date can be amended at this point.

However the Last Edit Date is auto populated.

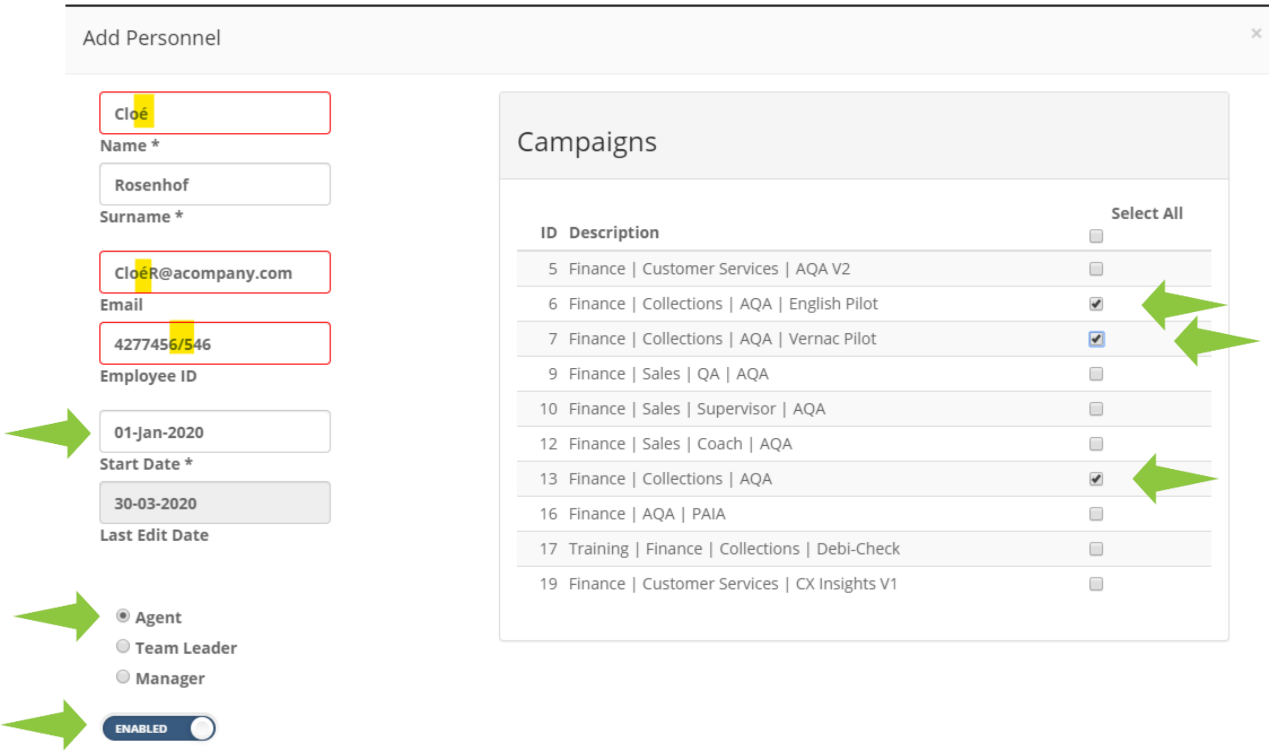


Below is a capture that will not be allowed to save.

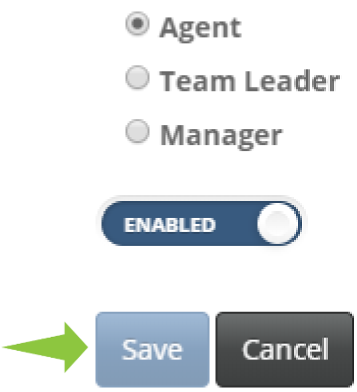
Here the red encircled boxes indicate where the errors lie.

I have highlighted in yellow the errors in the example below

1. "é" is not allowed in the Email boxes, but will be allowed in the Name and Surname boxes.
2. "/"is not allowed in the Employee ID box (note hyphen"-" is allowed)



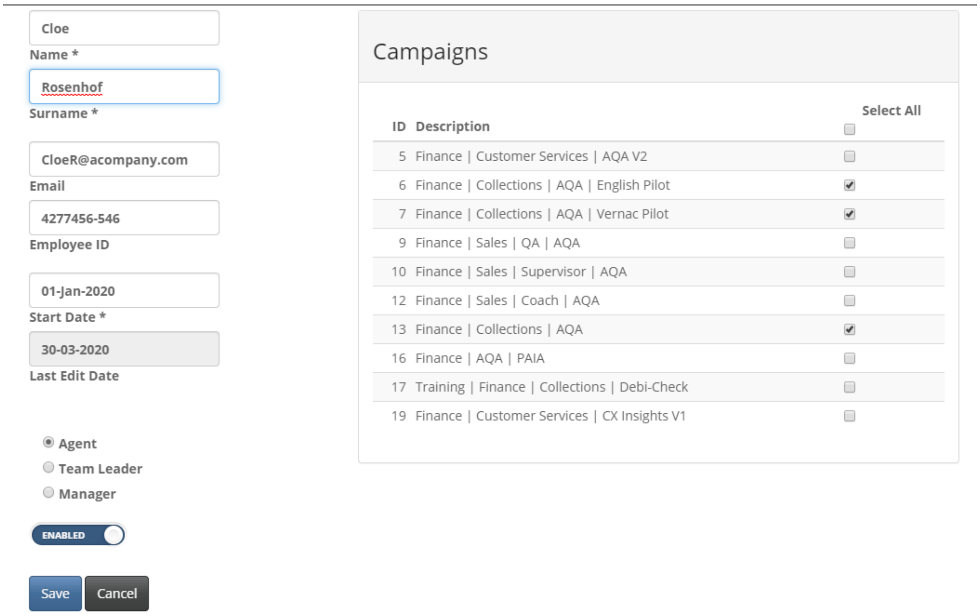
The Save button will also not be available until the errors are corrected.



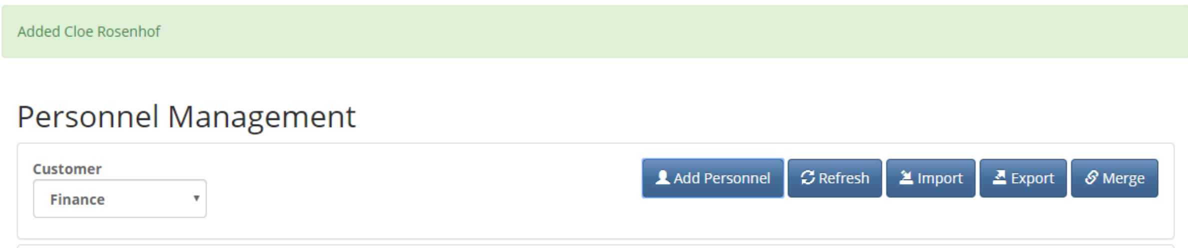
You will be able to update

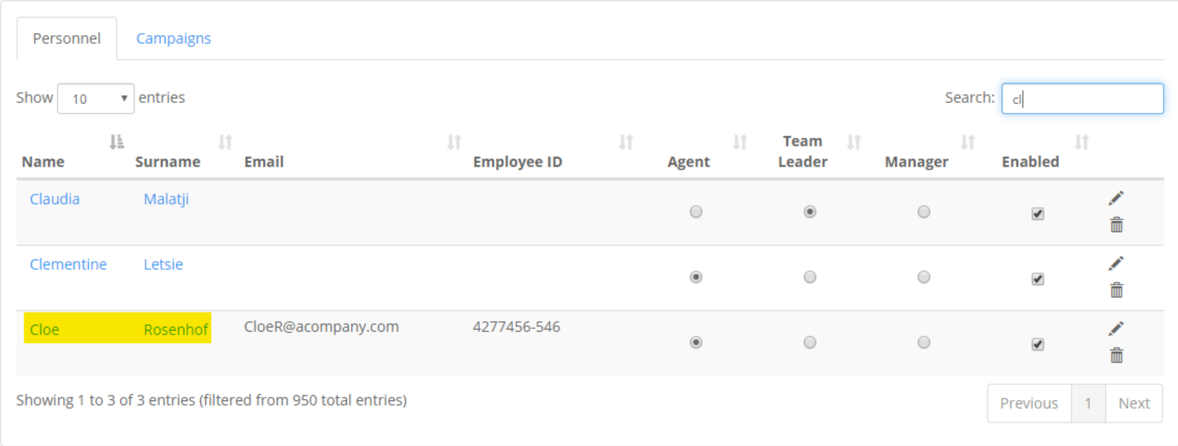
1. The Start Date
2. The Role (Agent, Team leader or Manager)
3. Enable (on the occasion when you want to do a creation but the person should not be on list immediately)
4. Allocate this person to single or multiple campaigns

Once the errors have been corrected the Save button will enabled.



Once saved you will get a notification banner on the main screen and the person will be added to the Personnel table.




Personnel
Campaigns
Show 10 entries
Search: cl
Name
Surname
Email
Employee ID
Agent
Team Leader
Manager
Enabled
Claudia
Malatji
Clementine
Letsie
Cloe
Rosenhof
CloeR@acompany.com
4277456-546
Showing 1 to 3 of 3 entries (filtered from 950 total entries)
Previous
1
Next

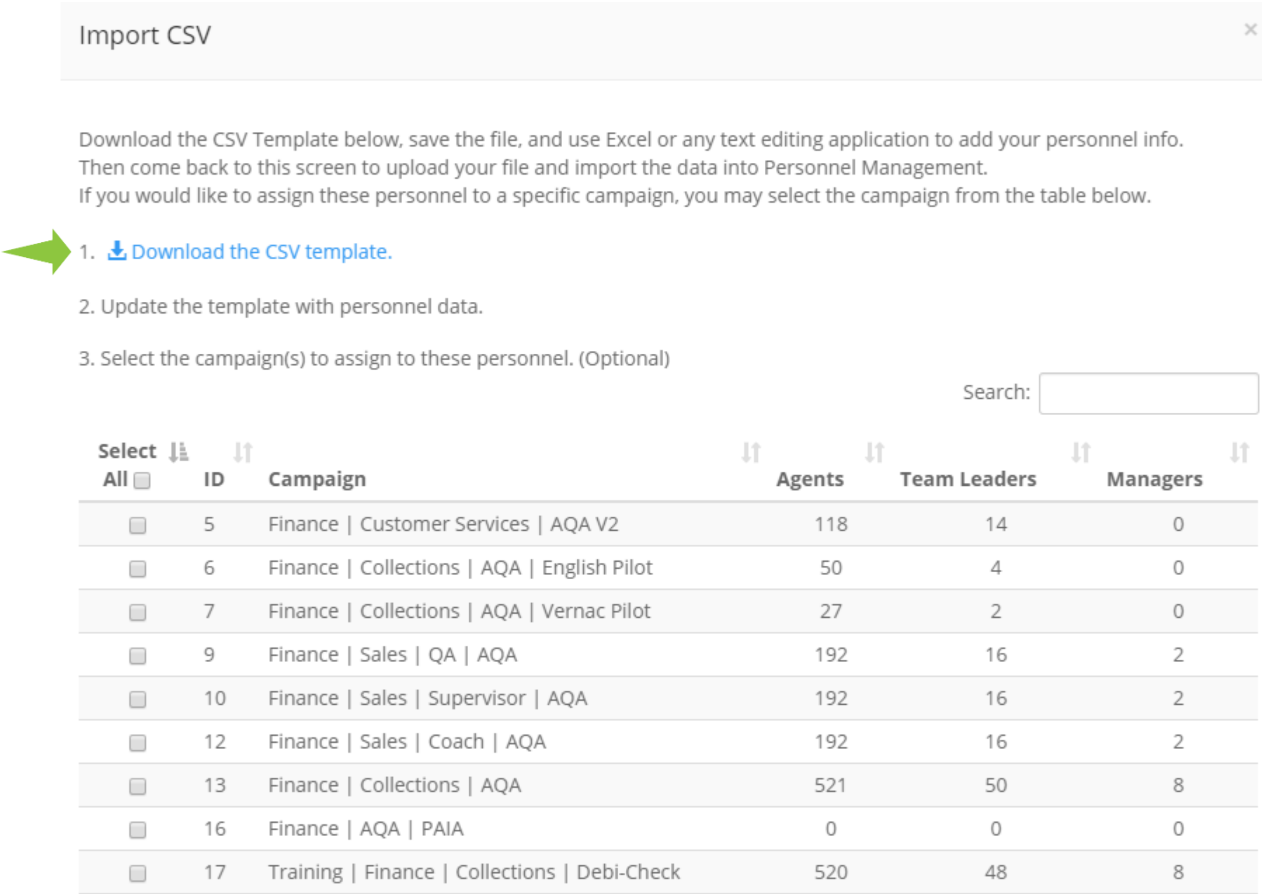
Bulk updates

adding a group of people

Ensure that your pc regional settings are set to English (United Kingdom) to ensure that the export displays correctly.

Select the Import button.

The following side window will pop-up.


Import CSV

Download the CSV Template below, save the file, and use Excel or any text editing application to add your personnel info.
Then come back to this screen to upload your file and import the data into Personnel Management.
If you would like to assign these personnel to a specific campaign, you may select the campaign from the table below.

1. Download the CSV template.

2. Update the template with personnel data.

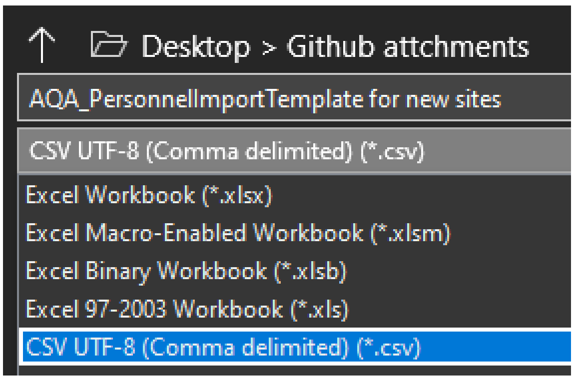
3. Select the campaign(s) to assign to these personnel. (Optional)

Search:

Select All	ID	Campaign	Agents	Team Leaders	Managers
	5	Finance | Customer Services | AQA V2	118	14	0
	6	Finance | Collections | AQA | English Pilot	50	4	0
	7	Finance | Collections | AQA | Vernac Pilot	27	2	0
	9	Finance | Sales | QA | AQA	192	16	2
	10	Finance | Sales | Supervisor | AQA	192	16	2
	12	Finance | Sales | Coach | AQA	192	16	2
	13	Finance | Collections | AQA	521	50	8
	16	Finance | AQA | PAIA	0	0	0
	17	Training | Finance | Collections | Debi-Check	520	48	8

Download and save the CSV template provided (file provided in UTF-8 format).

Save as a CSV UTF-8 (this is to insure that all accent options are saved correctly)



	A	B	C	D	E	F	G	H	I
1	Name	Surname	Employee ID (alphanumeric)	Email (email@example.com)	Start Date (dd/mm/yyyy)	Agent (True/False)	Team Leader (True/False)	Manager (True/False)	Enabled (True/False)
2									

The following coloumns will be found on this template.

1. Name
2. Surname
3. Employee ID (alphanumeric)
4. Email (email@example.com)
5. Start Date (dd/mm/yyyy)
6. Agent (True/False)
7. Team Leader (True/False)
8. Manager (True/False)
9. Enabled (True/False)

The same rules apply to bulk update that are applied to individual updates.

Below is an example of what your file should look like.

Note the error in row A9

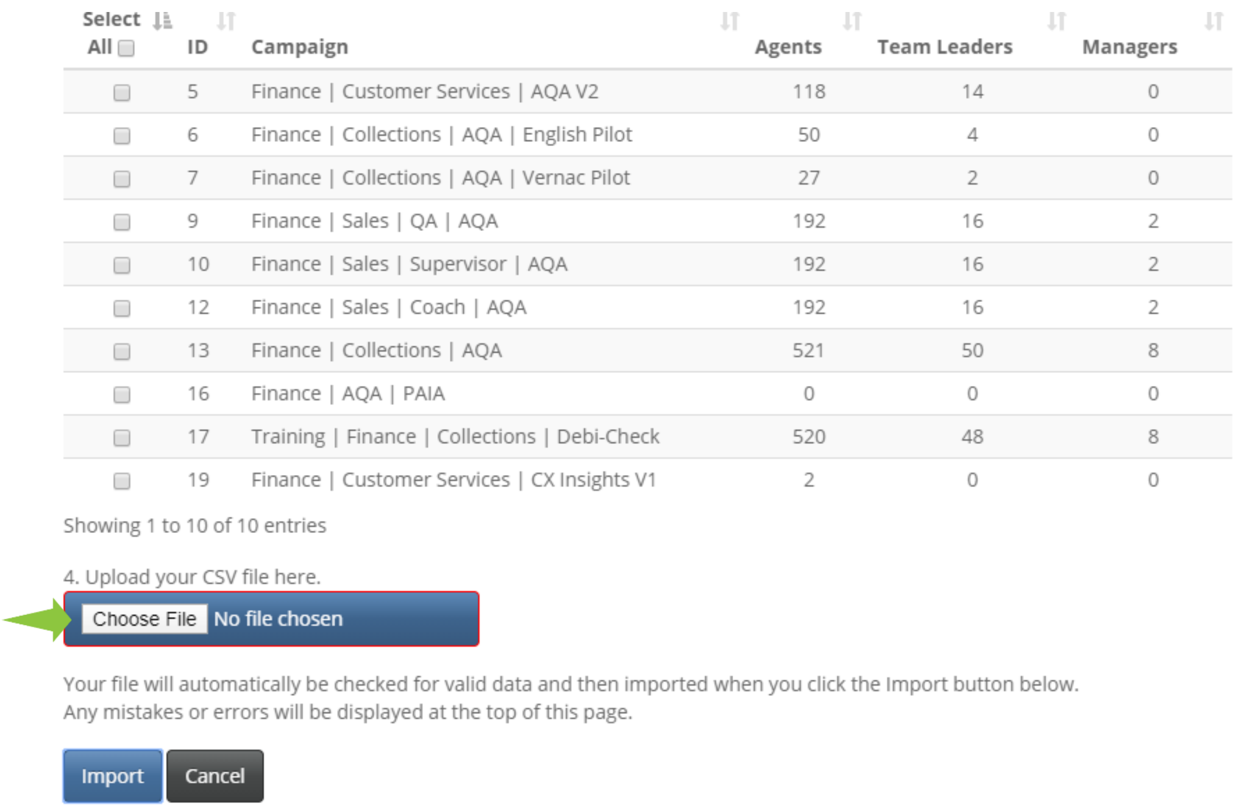
	A	B	C	D	E	F	G	H	I	J
1	Name	Surname	Employee II	Email (email@example.com)	Start Date (dd/	Agent (True/Fa	Team Leader (T	Manager (True	Enabled (True/False)	
2	Brian	Toms	48420916	TomsB@company.com	01/12/2019	FALSE	TRUE	FALSE	TRUE	
3	Lulu	Letsi	42102641	LetsiL@company.com	01/11/2019	FALSE	FALSE	TRUE	TRUE	
4	Joe	Soap	66947424	SoapJ@company.com	25/11/2019	TRUE	FALSE	FALSE	TRUE	
5	John	Smith	94129054	SmithJ@company.com	03/06/2019	TRUE	FALSE	FALSE	TRUE	
6	Tembi	George	61264055	GeorgeT@company.com	03/06/2019	TRUE	FALSE	FALSE	TRUE	
7	Lee-Anne	Smith	71438140	SmithL@company.com	01/11/2019	TRUE	FALSE	FALSE	TRUE	
8	Adele	Mafoko	20623545	MafokoA@company.com	25/11/2019	TRUE	FALSE	FALSE	TRUE	
9	Agnes$	Phama	41554778	Phama.A@company.com	01/12/2019	TRUE	FALSE	FALSE	TRUE	

Ensure that you last 4 colounms are correctly filled in.

In the example, your first entry happens to be a team-leader, the second entry is a manager and the rest of the list are agents.

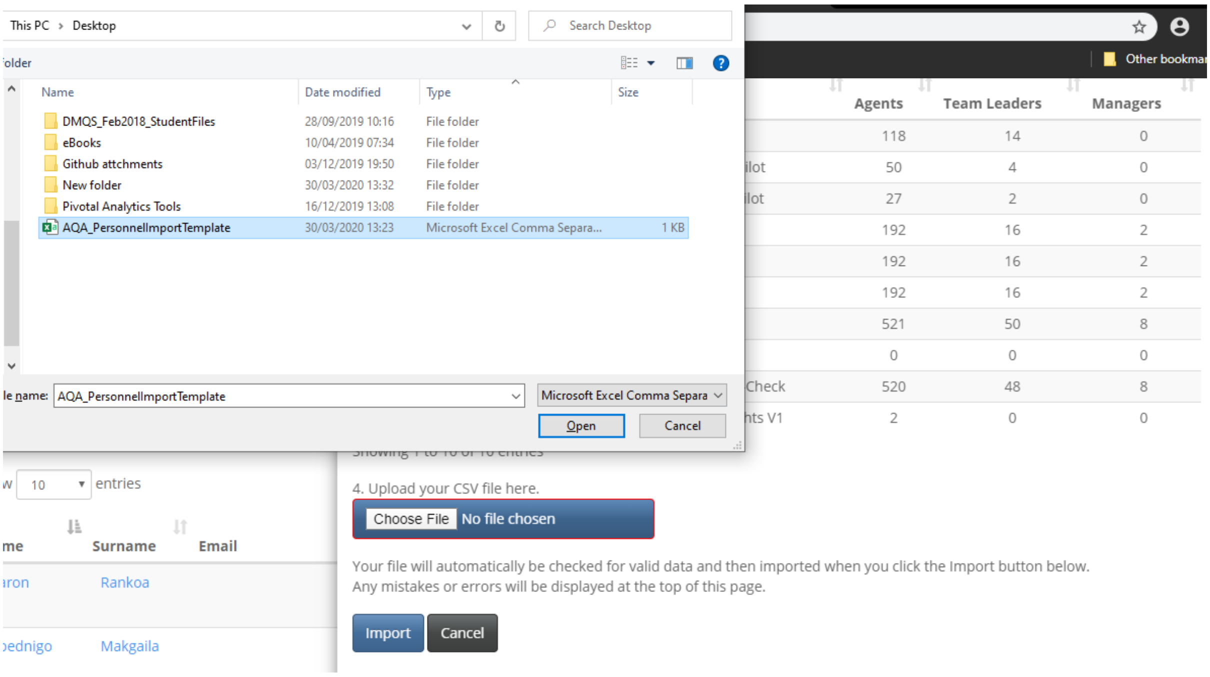
The order you put your staff in doesn't matter as long as your allocations of TRUE/FALSE are correct.

Once you have saved the file go back to the Import button and scroll down on the side pop-up to Choose File.



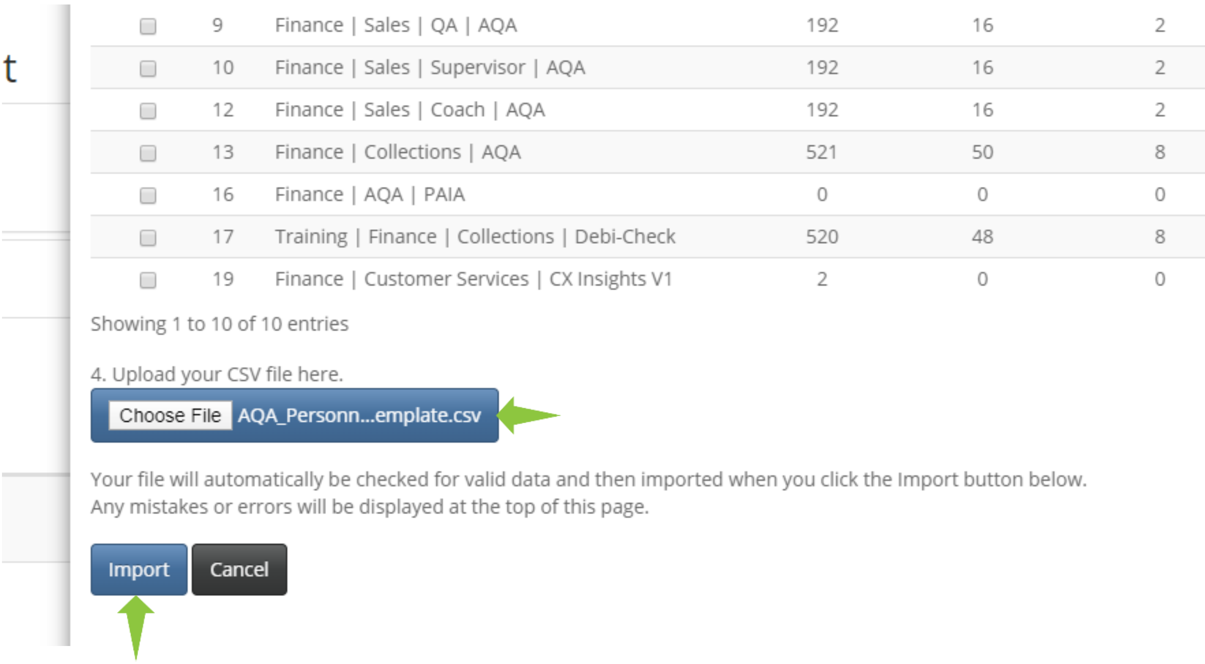
Select All	ID	Campaign	Agents	Team Leaders	Managers
	5	Finance | Customer Services | AQA V2	118	14	0
	6	Finance | Collections | AQA | English Pilot	50	4	0
	7	Finance | Collections | AQA | Vernac Pilot	27	2	0
	9	Finance | Sales | QA | AQA	192	16	2
	10	Finance | Sales | Supervisor | AQA	192	16	2
	12	Finance | Sales | Coach | AQA	192	16	2
	13	Finance | Collections | AQA	521	50	8
	16	Finance | AQA | PAIA	0	0	0
	17	Training | Finance | Collections | Debi-Check	520	48	8
	19	Finance | Customer Services | CX Insights V1	2	0	0

Browse to the location you have saved the file and select Open.

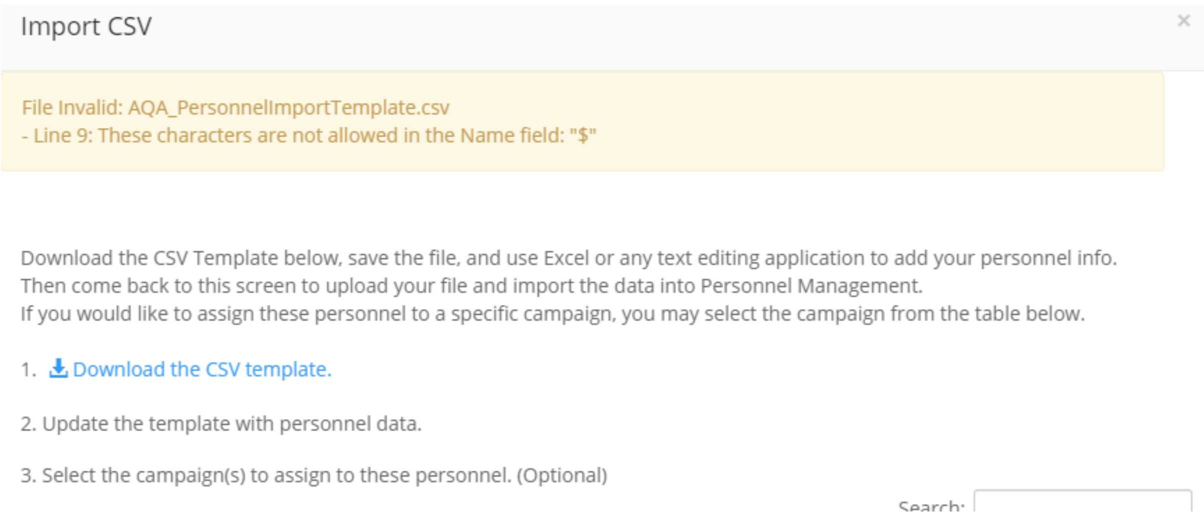


You will see your file name next Choose File

Select Import



Because of the error we left in A9 you will see the following notification appear at the top of the pop up.

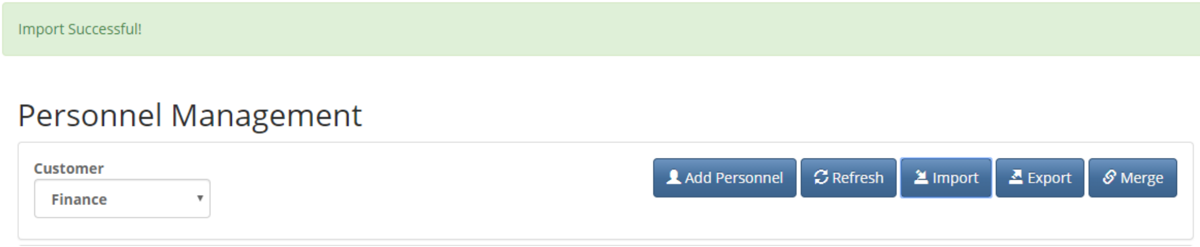


Your file name will also no longer show next to Choose File and the default of No file chosen will show.

So if you see the default of No file chosen, scroll to the top to see what you need to alter.

Once you have corrected and saved the file, you can follow the import option again.

You will get the following notification if you are successful.



In this example we did not allocate these staff members to campaign.

However, if they are all to be allocated to the same campaign or multiple campaign you can select the applicable campaigns before selecting the import button.

Your staff will now show in the Personnel table view.

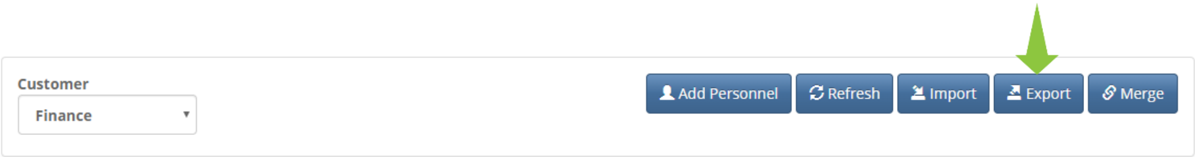
Name	Surname	Email	Employee ID	Agent	Team Leader	Manager	Enabled	
Brian	Toms	TomsB@company.com	48420916	○	●	○	☑	
Joe	Soap	SoapJ@company.com	66947424	●	○	○	☑	
Lee-Anne	Smith	SmithL@company.com	71438140	●	○	○	☑	
John	Smith	SmithJ@company.com	94129054	●	○	○	☑	
Agnes	Phama	Phama.A@company.com	41554778	●	○	○	☑	
Adele	Mafoko	MafokoA@company.com	20623545	●	○	○	☑	
Lulu	Letsi	LetsiL@company.com	42102641	○	○	●	☑	
Tembi	George	GeorgeT@company.com	61264055	●	○	○	☑	
Cloe	Rosenhof	CloeR@acompany.com	4277456-546	●	○	○	☑	
Aaron	Rankoa			●	○	○	☑	

Export Function

This function will allow you to export personnel information from one or mulitiple campaigns to a CSV file, for review.

Note although the resulting file shares charateristics of the import file you will not be able to use it to make bulk updates / edits, by changing data and then importing the file.

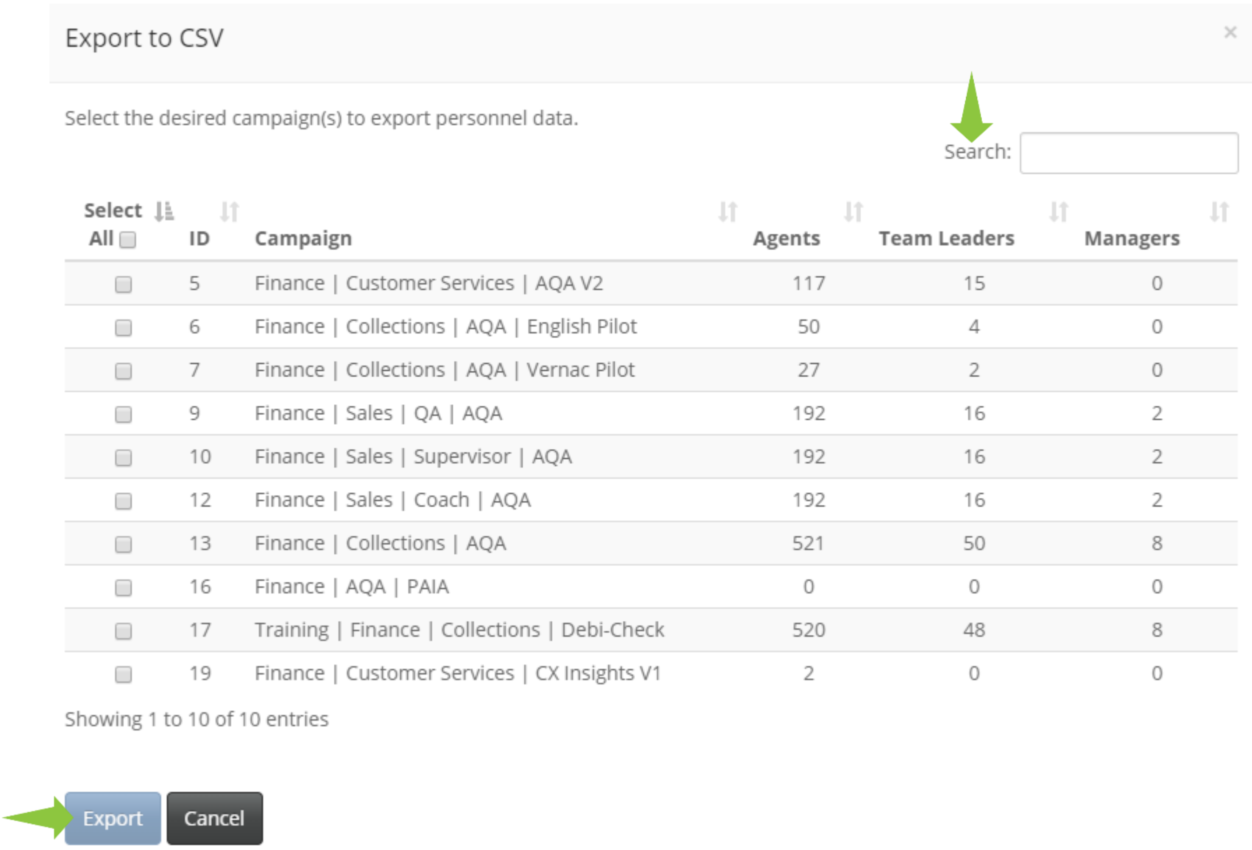
On the personnel menu select Export.



The following side menu will pop-up with the camapaigns assocaited with that customer database.

Note that the Export button is not available and will remain so until you have selected your campaigns.

You can use the search box to narrow down you campaign entry options.



Export to CSV

Select the desired campaign(s) to export personnel data.

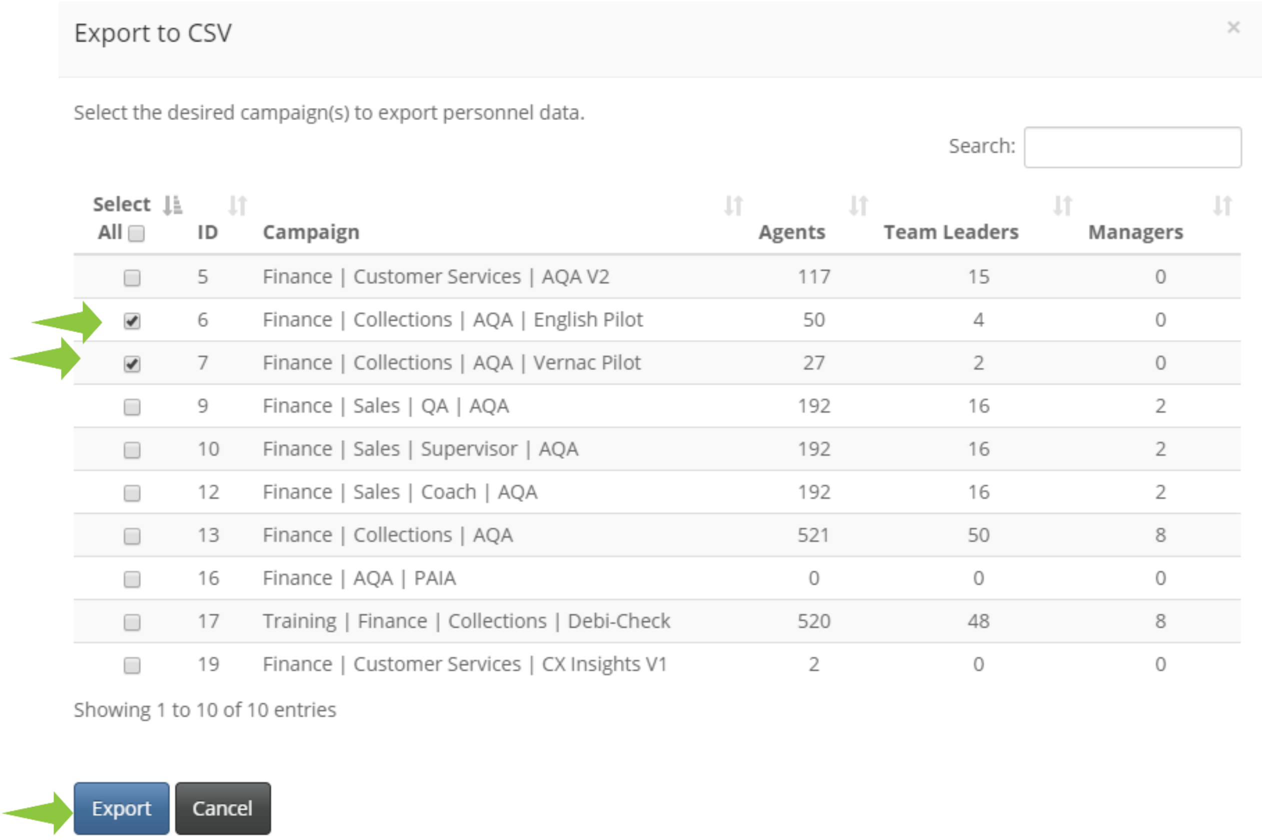
Search:

Select All	ID	Campaign	Agents	Team Leaders	Managers
	5	Finance | Customer Services | AQA V2	117	15	0
	6	Finance | Collections | AQA | English Pilot	50	4	0
	7	Finance | Collections | AQA | Vernac Pilot	27	2	0
	9	Finance | Sales | QA | AQA	192	16	2
	10	Finance | Sales | Supervisor | AQA	192	16	2
	12	Finance | Sales | Coach | AQA	192	16	2
	13	Finance | Collections | AQA	521	50	8
	16	Finance | AQA | PAIA	0	0	0
	17	Training | Finance | Collections | Debi-Check	520	48	8
	19	Finance | Customer Services | CX Insights V1	2	0	0

Showing 1 to 10 of 10 entries

Export Cancel

Once you have made your selection, click on the enabled Export button.



Select All	ID	Campaign	Agents	Team Leaders	Managers
☐	5	Finance | Customer Services | AQA V2	117	15	0
☑	6	Finance | Collections | AQA | English Pilot	50	4	0
☑	7	Finance | Collections | AQA | Vernac Pilot	27	2	0
☐	9	Finance | Sales | QA | AQA	192	16	2
☐	10	Finance | Sales | Supervisor | AQA	192	16	2
☐	12	Finance | Sales | Coach | AQA	192	16	2
☐	13	Finance | Collections | AQA	521	50	8
☐	16	Finance | AQA | PAIA	0	0	0
☐	17	Training | Finance | Collections | Debi-Check	520	48	8
☐	19	Finance | Customer Services | CX Insights V1	2	0	0

The resulting CSV file will look like this, a filled in verson of the import file with the additional coloum of Unique ID (A).

GENii
analytics & artificial intelligence

	A	B	C	D	E	F	G	H	I	J	K
1	Unique ID	Name	Surname	Employee	Email	Start Date	Last Edit Date	Agent	Team Lea	Manager	Enabled
2	11	Abia	Morudi			13/02/2019 00:00	26/03/2020 00:00	FALSE	TRUE	FALSE	TRUE
3	12	Adesh	Jadoo			12/02/2019 00:00	26/03/2020 00:00	FALSE	TRUE	FALSE	TRUE
4	16	Brenda	Vorster			12/02/2019 00:00	26/03/2020 00:00	FALSE	TRUE	FALSE	TRUE
5	22	Emily	Mohapi			01/07/2019 00:00	26/03/2020 00:00	FALSE	TRUE	FALSE	TRUE
6	56	Tsundzuk	Maluleke			13/02/2019 00:00	26/03/2020 00:00	FALSE	TRUE	FALSE	TRUE
7	230	Angeline	Makgato			13/02/2019 00:00	26/03/2020 00:00	TRUE	FALSE	FALSE	TRUE
8	236	Aphelele	Vusani			04/06/2019 00:00	26/03/2020 00:00	TRUE	FALSE	FALSE	TRUE
9	260	Cebisile	Mdaki			14/02/2019 00:00	26/03/2020 00:00	TRUE	FALSE	FALSE	TRUE
10	276	Daniel	Manala			12/02/2019 00:00	26/03/2020 00:00	TRUE	FALSE	FALSE	TRUE
11	292	Dorothy	Tsotetsi			19/02/2019 00:00	26/03/2020 00:00	TRUE	FALSE	FALSE	TRUE
12	307	Ellen	Malapile			12/02/2019 00:00	26/03/2020 00:00	TRUE	FALSE	FALSE	TRUE
13	309	Elmon	Khosa			12/02/2019 00:00	26/03/2020 00:00	TRUE	FALSE	FALSE	TRUE
14	313	Emmanue	Monyai			12/02/2019 00:00	26/03/2020 00:00	TRUE	FALSE	FALSE	TRUE
15	314	Emmanue	Nxumalo			12/02/2019 00:00	26/03/2020 00:00	TRUE	FALSE	FALSE	TRUE
16	322	Fanele	Themba			12/02/2019 00:00	26/03/2020 00:00	TRUE	FALSE	FALSE	TRUE
17	329	Gertrude	Chokoe			12/02/2019 00:00	26/03/2020 00:00	TRUE	FALSE	FALSE	TRUE
18	344	Grace	Motloheloa			15/02/2019 00:00	26/03/2020 00:00	TRUE	FALSE	FALSE	TRUE
19	345	Granny	Phahlamohlaka			12/02/2019 00:00	26/03/2020 00:00	TRUE	FALSE	FALSE	TRUE
20	356	Itumeleng	Tabane			26/02/2019 00:00	26/03/2020 00:00	TRUE	FALSE	FALSE	TRUE
21	368	Jeanette	Lenkoe			12/02/2019 00:00	26/03/2020 00:00	TRUE	FALSE	FALSE	TRUE
22	371	Joseph	Manemela			14/02/2019 00:00	26/03/2020 00:00	TRUE	FALSE	FALSE	TRUE
23	385	Keitumets	Mothlala			15/02/2019 00:00	26/03/2020 00:00	TRUE	FALSE	FALSE	TRUE
24	400	Khotso	Sello			13/02/2019 00:00	26/03/2020 00:00	TRUE	FALSE	FALSE	TRUE
25	423	Lindiwe	Thomo			14/02/2019 00:00	26/03/2020 00:00	TRUE	FALSE	FALSE	TRUE
26	433	Lydia	Sekharume			20/02/2019 00:00	26/03/2020 00:00	TRUE	FALSE	FALSE	TRUE
27	437	Mahlatse	Maleswena			05/04/2019 00:00	26/03/2020 00:00	TRUE	FALSE	FALSE	TRUE
28	441	Mante	Tompane			15/02/2019 00:00	26/03/2020 00:00	TRUE	FALSE	FALSE	TRUE
29	445	Maria	Molekwa			12/02/2019 00:00	26/03/2020 00:00	TRUE	FALSE	FALSE	TRUE

There are a few things to note in this export:

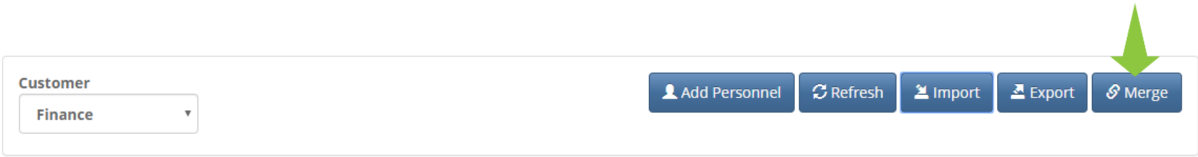
1. This is a consolidated view of both the campaigns I've selected. Therefore agents on both campaigns will only show once.
2. No campaign allocations will show here.
3. The list is sorted by Unique ID.

As noted above if you make changes to this file and try to do a bulk update you will get a error notification.

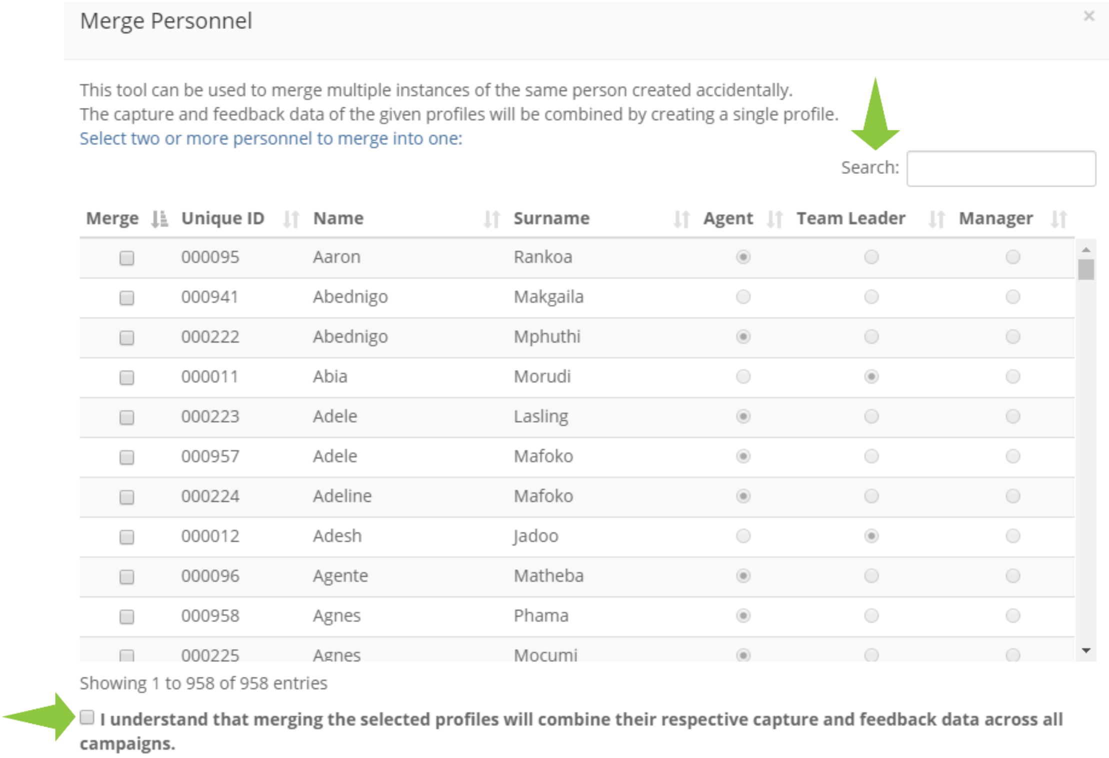
Merge Function

This function allows you to combine the data of two personnel in the event where one person was created twice.

Example: with the previous list management system, name changes (surname updates) resulted in the data being distributed between the two names depending on the the time of the name update.



Once you have selected Merge, the following following side window will pop-up



Merge	Unique ID	Name	Surname	Agent	Team Leader	Manager
☐	000095	Aaron	Rankoa	◉	○	○
☐	000941	Abednigo	Makgaila	○	○	○
☐	000222	Abednigo	Mphuthi	◉	○	○
☐	000011	Abia	Morudi	○	◉	○
☐	000223	Adele	Lasling	◉	○	○
☐	000957	Adele	Mafoko	◉	○	○
☐	000224	Adeline	Mafoko	◉	○	○
☐	000012	Adesh	Jadoo	○	◉	○
☐	000096	Agente	Matheba	◉	○	○
☐	000958	Agnes	Phama	◉	○	○
☐	000225	Agnes	Mocumi	◉	○	○

Lets say Mpho got married and wanted her name updated on the app prior to People Manager.

Because we implimented this change she now shows up as 2 separate people on all reports, Mpho Polori and Mpho Ngobeni.

Karabo Mokobane	21	1	95.2 %	100.0 %	95.2 %	100.0 %	100.0 %	1	0
Mpho Ngobeni	5	1	80.0 %	100.0 %	80.0 %	100.0 %	100.0 %	5	0
Mpho Polori	24	5	79.2 %	95.8 %	79.2 %	100.0 %	100.0 %	16	0
Ndodenhle Dlamini	25	0	100.0 %	100.0 %	100.0 %	100.0 %	100.0 %	20	0

We can now combine the data under one name using the merge function.

We use the search function to reduce the list.

Add ticks to the agents we wish to merge and read the fine print before selecting merge.

Merge Personnel

This tool can be used to merge multiple instances of the same person created accidentally.
The capture and feedback data of the given profiles will be combined by creating a single profile.
Select two or more personnel to merge into one:

Search: mpho

Merge	Unique ID	Name	Surname	Agent	Team Leader	Manager
☐	000665	Dimpho	Kodisang	◉	○	○
☐	000152	Mamphoto	Ramahlo	◉	○	○
☐	000482	Mpho	Letakgomo	◉	○	○
☐	000752	Mpho	Matshaba	◉	○	○
☐	000753	Mpho	Moeketsi	◉	○	○
☑	000163	Mpho	Ngobeni	◉	○	○
☑	000164	Mpho	Polori	◉	○	○
☐	000483	Mpho Ruth	Thipe	◉	○	○

Showing 1 to 8 of 8 entries (filtered from 958 total entries)

☑ **I understand that merging the selected profiles will combine their respective capture and feedback data across all campaigns.**

Merge Cancel

The app will allocated the name associated with the lowest unique id and the following confirmation will appear.

Merge Successful!
Full Name: Mpho Ngobeni

All reports will now show Mpho with a consolidated data set.

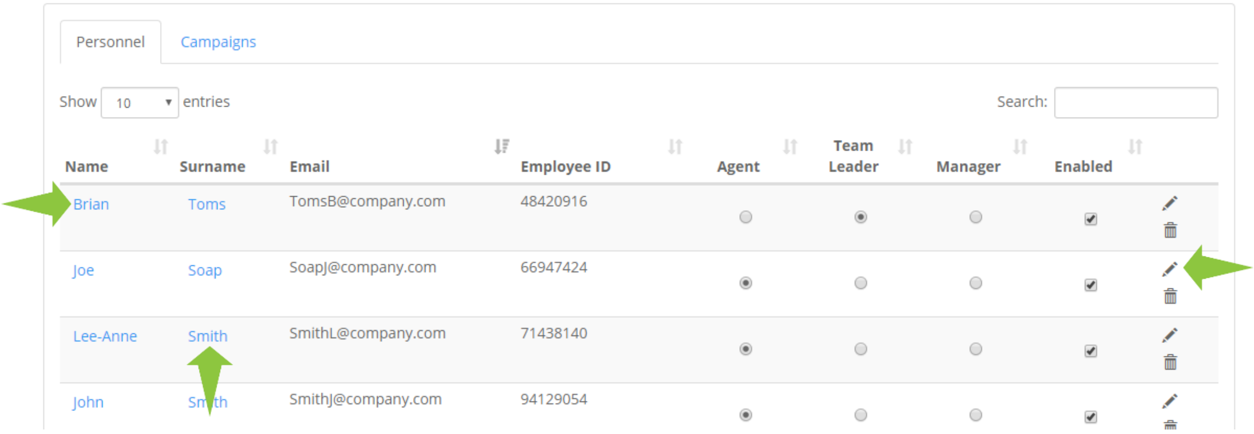
Mmasello Badi	24	7	70.8 %	100.0 %	70.8 %	100.0 %	100.0 %	0	0
Morongoa Karabo Mokobane	21	1	95.2 %	100.0 %	95.2 %	100.0 %	100.0 %	1	0
Mpho Ngobeni	29	6	79.3 %	96.6 %	79.3 %	100.0 %	100.0 %	21	0
Ndodenhle Dlamini	25	0	100.0 %	100.0 %	100.0 %	100.0 %	100.0 %	20	0
Nomonde Zwane	23	5	78.3 %	95.7 %	78.3 %	100.0 %	100.0 %	13	2
Nompumelelo Magwaza	24	1	95.8 %	100.0 %	95.8 %	100.0 %	100.0 %	1	0
Total	2286	363	84.3 %	96.3 %	86.5 %	99.3 %	97.7 %	1004	71

If this is not Mpho’s correct new name, this can be updated using the edit function, detailed below.

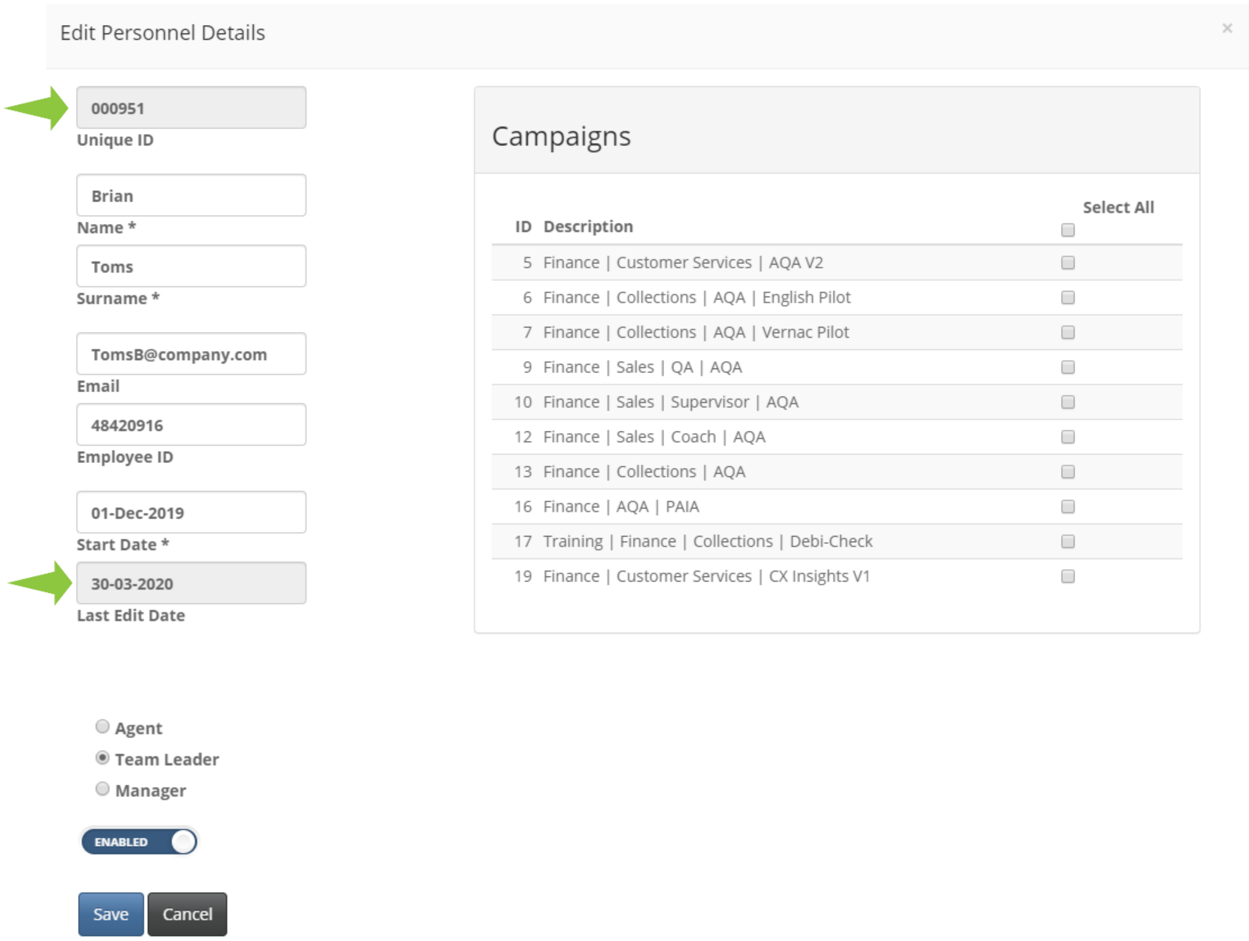
Editing Personnel

You can edit you personnel information by accessing the edit view a few ways.

By clicking the Name, Surname or the pencil icon of the required person you wish to update.



The greyed out areas can't be changed, however there rest can be updated.

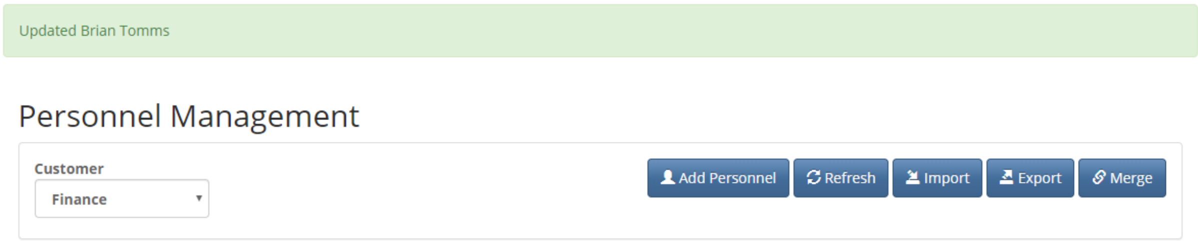


Roles, campaign allocations, spelling mistakes can all be updated in this view.

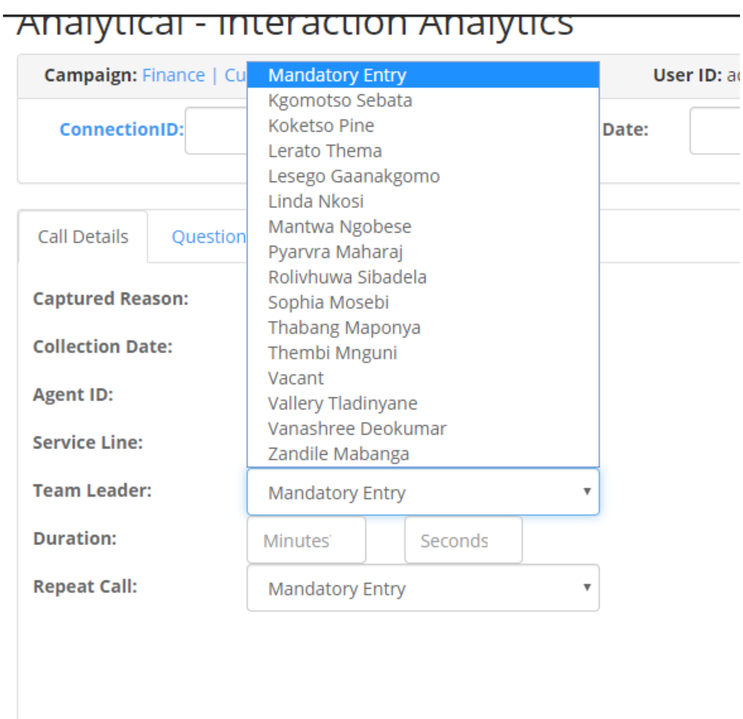
In this example we are updating Brian's Surname and Email.

And adding him to the Customer Services Campaign.

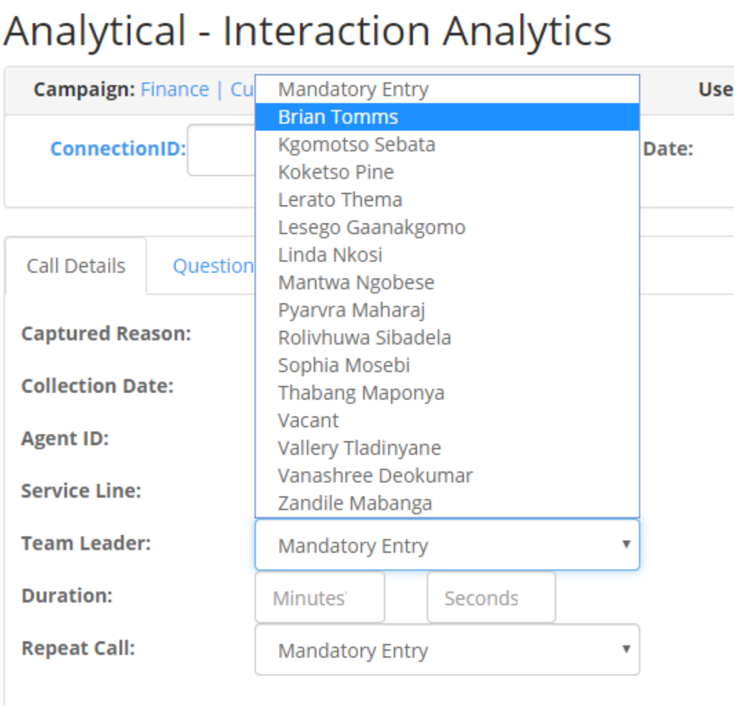
You will get a notification once the update is successful.



Below is the view the Team Leader list on Customer Services prior to allocated Brian to this campaign.



After


Analytical - Interaction Analytics
Campaign: Finance | Cu
Use
ConnectionID:
Date:
Call Details
Question
Mandatory Entry
Brian Tomms
Kgomotso Sebata
Koketso Pine
Lerato Thema
Lesego Gaanakgomo
Linda Nkosi
Mantwa Ngobese
Pyarvra Maharaj
Rolivhuwa Sibadela
Sophia Mosebi
Thabang Maponya
Vacant
Vallery Tladinyane
Vanashree Deokumar
Zandile Mabanga
Captured Reason:
Collection Date:
Agent ID:
Service Line:
Team Leader:
Mandatory Entry
Duration:
Minutes
Seconds
Repeat Call:
Mandatory Entry

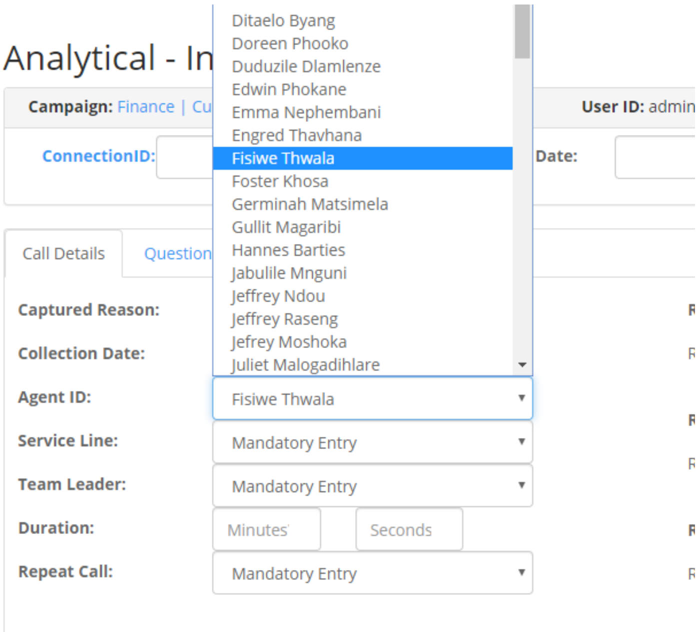
Removing Personnel from the lists

There are two ways to remove personnel form the lists.

1. Disabling the personnel (Recommended)
2. Deleting the personnel – this can only be done if there is no data linked to this person.

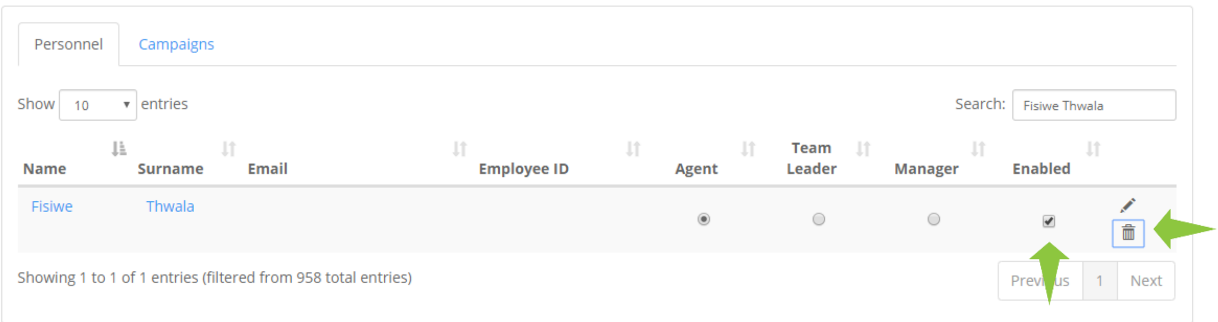
You can do both from the Personnel table view.

Lets remove Fisiwe Thwala from the agent list on Customer Services



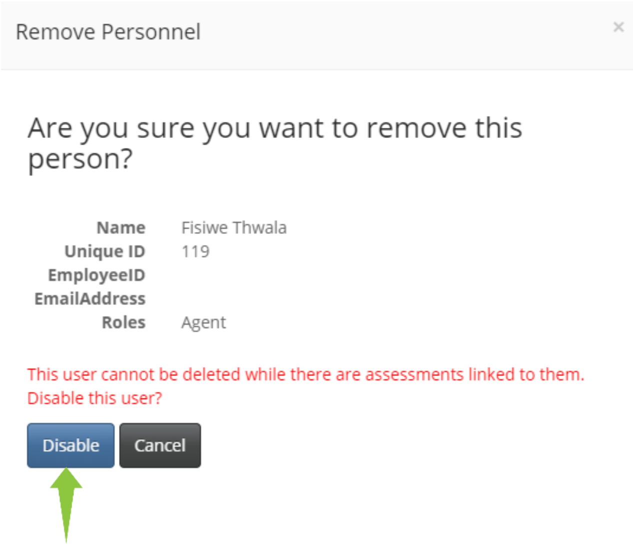
We've searched for them using the search function on the Personnel Table.

We can take them off the list by removing the tick in the Enabled coloum.



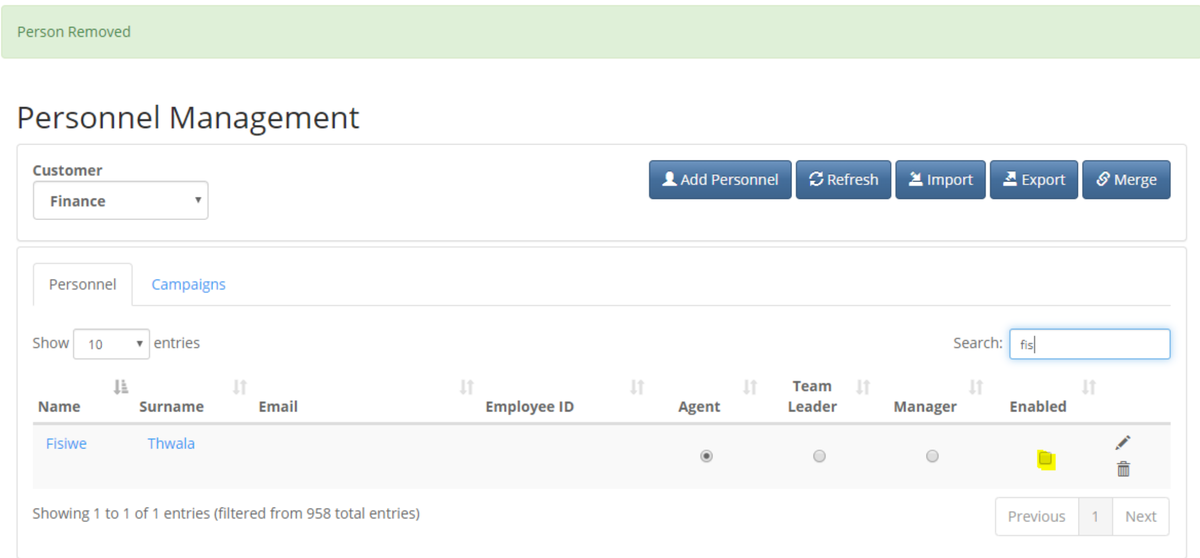
We can also attempt to remove them from the list using the trash can (Remove) icon on the table.

However because this person has captures you will get the following notification

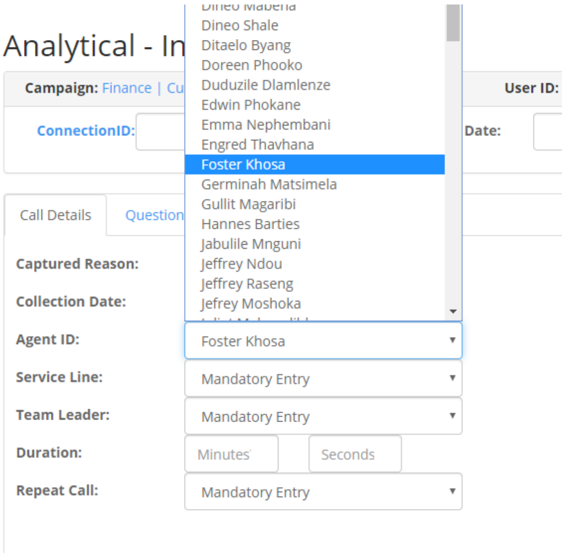


This option will however allow you to Disable the person.

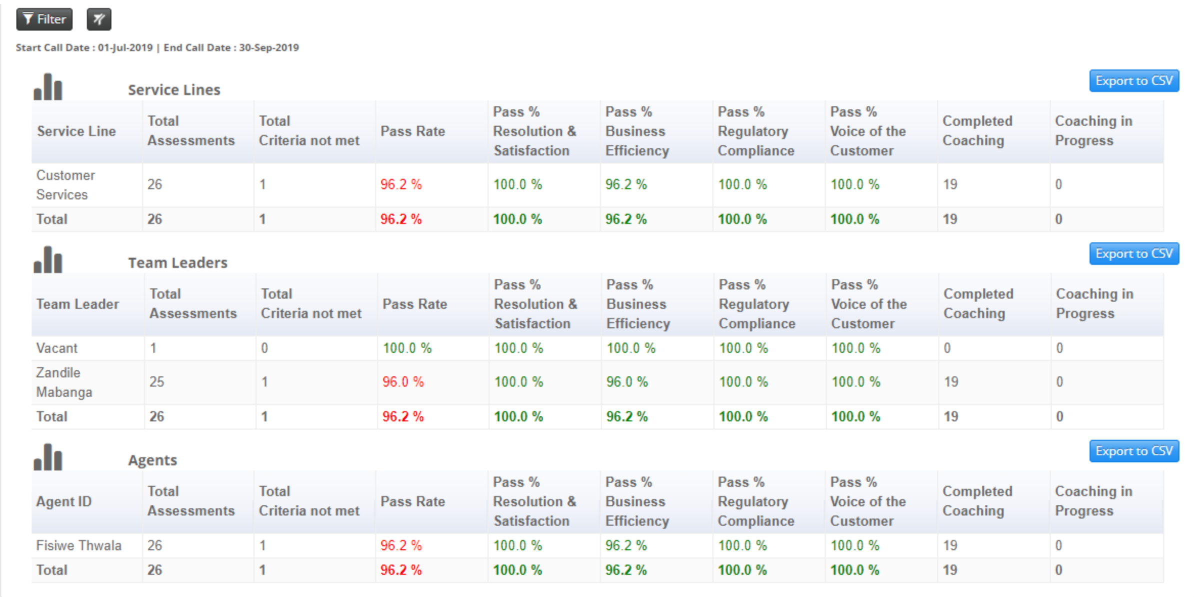
You will be able to view the person on the table, but there will no longer be a tick in the Enabled box and the person will not be on the list.



After



Note: As mentioned previously, this action will updated the list but any data captured will still be viewable on the reports.



Filter

Start Call Date : 01-Jul-2019 | End Call Date : 30-Sep-2019

Service Lines

Export to CSV

Service Line	Total Assessments	Total Criteria not met	Pass Rate	Pass % Resolution & Satisfaction	Pass % Business Efficiency	Pass % Regulatory Compliance	Pass % Voice of the Customer	Completed Coaching	Coaching in Progress
Customer Services	26	1	96.2 %	100.0 %	96.2 %	100.0 %	100.0 %	19	0
Total	26	1	96.2 %	100.0 %	96.2 %	100.0 %	100.0 %	19	0

Team Leaders

Export to CSV

Team Leader	Total Assessments	Total Criteria not met	Pass Rate	Pass % Resolution & Satisfaction	Pass % Business Efficiency	Pass % Regulatory Compliance	Pass % Voice of the Customer	Completed Coaching	Coaching in Progress
Vacant	1	0	100.0 %	100.0 %	100.0 %	100.0 %	100.0 %	0	0
Zandile Mabanga	25	1	96.0 %	100.0 %	96.0 %	100.0 %	100.0 %	19	0
Total	26	1	96.2 %	100.0 %	96.2 %	100.0 %	100.0 %	19	0

Agents

Export to CSV

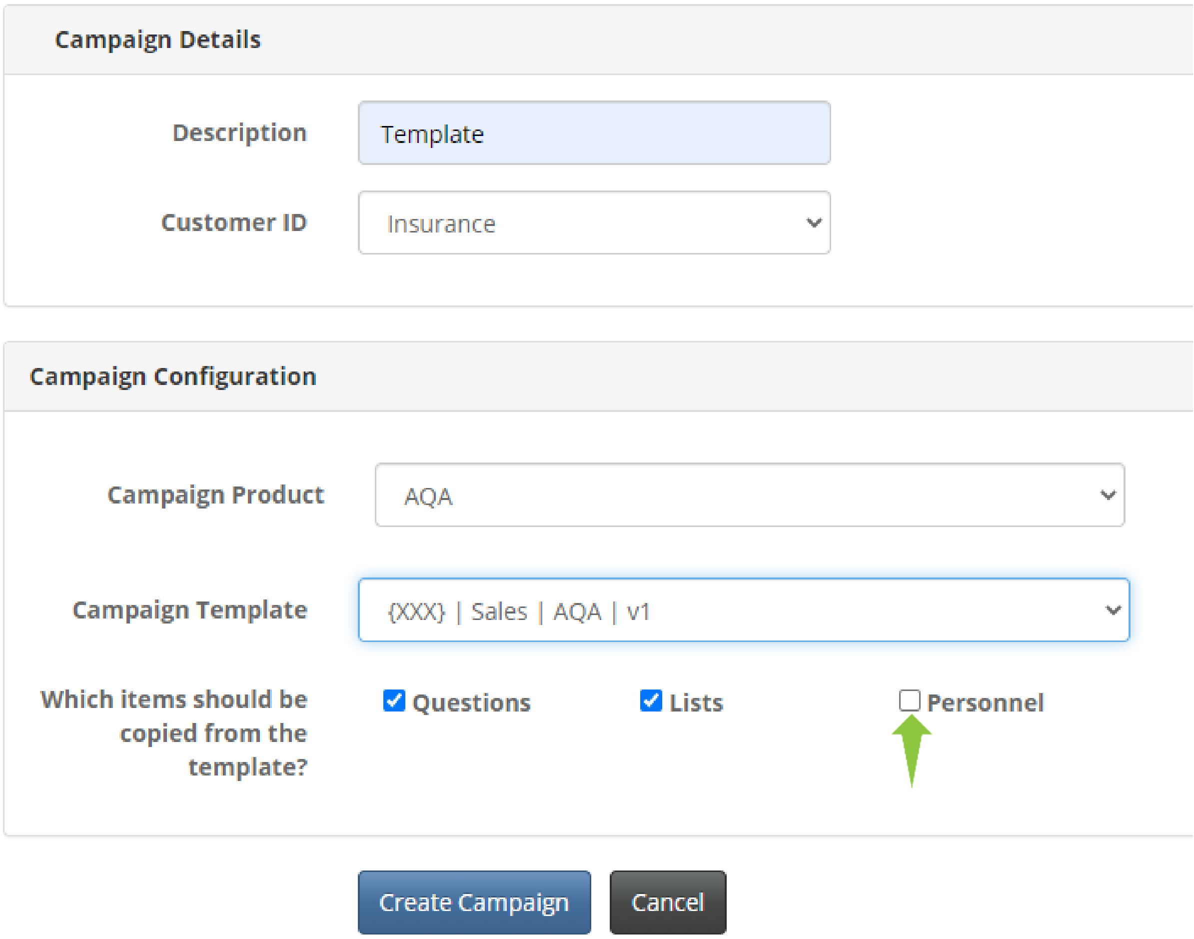
Agent ID	Total Assessments	Total Criteria not met	Pass Rate	Pass % Resolution & Satisfaction	Pass % Business Efficiency	Pass % Regulatory Compliance	Pass % Voice of the Customer	Completed Coaching	Coaching in Progress
Fisiwe Thwala	26	1	96.2 %	100.0 %	96.2 %	100.0 %	100.0 %	19	0
Total	26	1	96.2 %	100.0 %	96.2 %	100.0 %	100.0 %	19	0

Copying Staff Lists – Advanced Feature

This feature is mainly for those who will be creating new campaigns using current running campaigns, as it allows for the copying of entire staff lists from one campaign to another.

When Creating a New Campaign

When creating new campaigns using existing campaigns, you will now have an option to include or exclude the staff from the existing campaign.

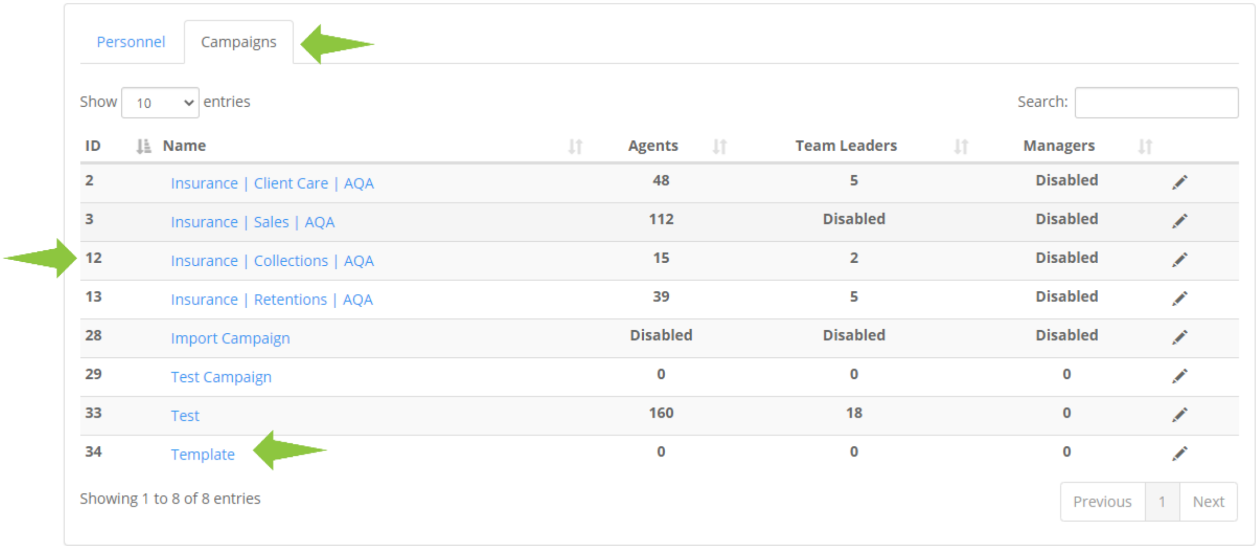


By including a tick in the Personnel box, you will copy all the staff allocated to {XXX} | Sales | AQA | v1 to the new campaign Template.

Copy Staff Lists to an Existing Campaign

Here we are going to copy staff to an already existing campaign.

On People Management go to the Campaigns tab.



We will be copying staff that are currently on the Collections Campaign to the Template Campaign which has no staff currently.

Click the Template campaign to open the side window.

Template

Search:

Unique ID	Name	Surname	Agent	Team Leader	Mana
000001	Adnan	Bhamjee			
000002	Adrian	Sagadaven			
000003	Ajesh	Ramphul			
000004	Ben	Chilufya			
000005	Jannie	Burness			
000006	Jason	Kennard-Davis			
000007	Novash	Manilal			
000008	Ponalo	Mashile			
000009	Samantha	Kennedy			

Showing 1 to 610 of 610 entries

Save

Cancel

Copy personnel from an existing campaign...

Click on the button indicated above, the window below will open.

Select the Collections campaign (you can only select one campaign at a time)

And the click Copy.

Copy Campaign Personnel

This tool will assign the same personnel to your target campaign as the campaign you select here.

Your target campaign is **Template**

Select the campaign with the assigned personnel you wish to copy:

Search:

	ID	Name	Agents	Team Leaders	Managers
	2	Insurance | Client Care | AQA	48	5	Disabled
	3	Insurance | Sales | AQA	112	Disabled	Disabled
	12	Insurance | Collections | AQA	15	2	Disabled
	13	Insurance | Retentions | AQA	39	5	Disabled
	28	Import Campaign	Disabled	Disabled	Disabled
	29	Test Campaign	0	0	0
	33	Test	160	18	0

Showing 1 to 7 of 7 entries

Copy Cancel

The following message will appear and once you have refreshed the page you will see the numbers update accordingly.

Personnel assigned successfuly!

Personnel | Campaigns

Show 10 entries

Search:

ID	Name	Agents	Team Leaders	Managers	
2	Insurance | Client Care | AQA	48	5	Disabled	
3	Insurance | Sales | AQA	112	Disabled	Disabled	
12	Insurance | Collections | AQA	15	2	Disabled	
13	Insurance | Retentions | AQA	39	5	Disabled	
28	Import Campaign	Disabled	Disabled	Disabled	
29	Test Campaign	0	0	0	
33	Test	160	18	0	
34	Template	15	2	0	

Showing 1 to 8 of 8 entries

Previous 1 Next

We are now going to add the staff from the Client Care campaign to the Template campaign.

Follow the same process as above.

You will now see that because we already have staff on the Template campaign you will be given an option to either keep or replace the existing staff.

We will be adding to the staff compliment.

Copy Campaign Personnel

This tool will assign the same personnel to your target campaign as the campaign you select here.

Your target campaign is **Template**

Select the campaign with the assigned personnel you wish to copy:

Search:

	ID	Name	Agents	Team Leaders	Managers
◉	2	Insurance | Client Care | AQA	48	5	Disabled
○	3	Insurance | Sales | AQA	112	Disabled	Disabled
○	12	Insurance | Collections | AQA	15	2	Disabled
○	13	Insurance | Retentions | AQA	39	5	Disabled
○	28	Import Campaign	Disabled	Disabled	Disabled
○	29	Test Campaign	0	0	0
○	33	Test	160	18	0

Showing 1 to 7 of 7 entries

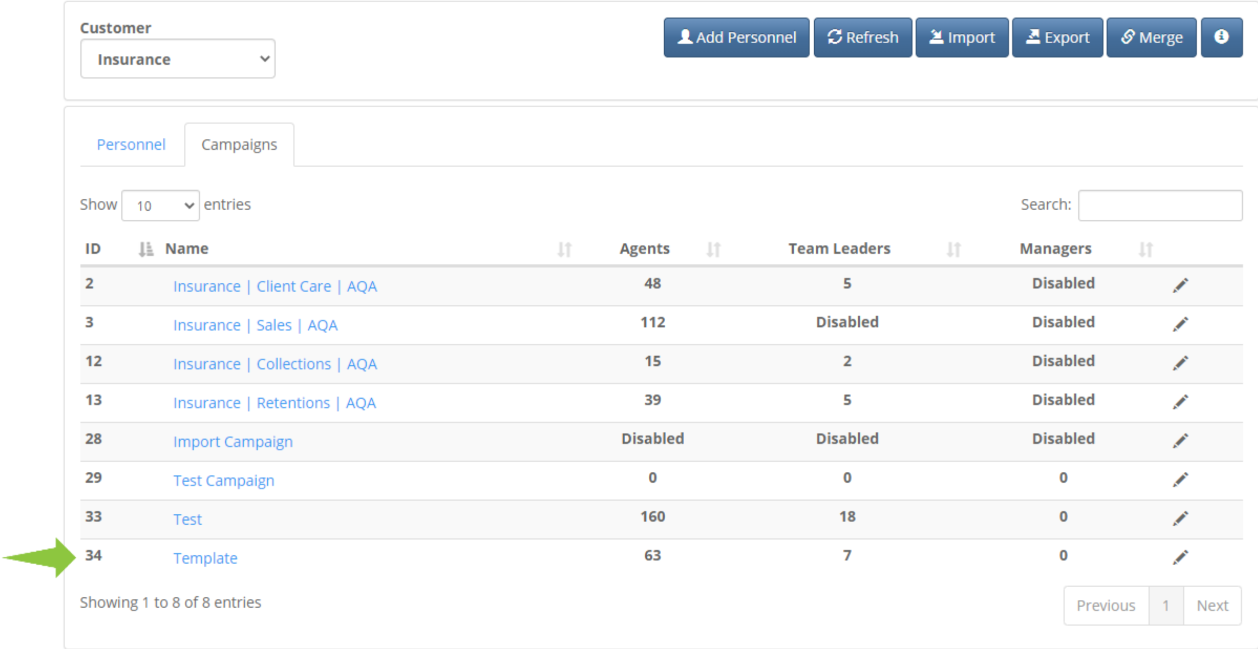
It looks like your campaign **(Template)** already has some personnel assigned to it.
What would you like to do?

◉ **Keep the current personnel assigned when copying**

○ **Unassign the current personnel when copying**

Copy Cancel

The Template campaign will now have a combination of the staff from both the Collections and Client Care campaigns.



ID	Name	Agents	Team Leaders	Managers
2	Insurance | Client Care | AQA	48	5	Disabled
3	Insurance | Sales | AQA	112	Disabled	Disabled
12	Insurance | Collections | AQA	15	2	Disabled
13	Insurance | Retentions | AQA	39	5	Disabled
28	Import Campaign	Disabled	Disabled	Disabled
29	Test Campaign	0	0	0
33	Test	160	18	0
34	Template	63	7	0

Please note that this copy function will not work across client dbs.

You will only be able to assign staff between campaigns on the same client db.

FIN