== Meeting ==

1. Agent and Campaign Campaign

== Email #1 ==

The general gist is this:

- They'll have something running on the telco side that'll be pushing info as HTTP call to the system to result in database entries being created (which'll include scores, identifier details etc.)

- On the web side, the interface will offer a way to parse those details to do reporting around the data that's been accumulated. This will include visual interactions (graphs, pie charts etc.), filters.

My understanding is that we just need to worry about the web side + the thing receiving the HTTP requests that does the inserts to DB (we'd naturally be provided with the schema/ structure of the payload)

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VIBE

**High Level Plan**

Phase 1:

Login page

Reports with customisable displays and graphical reports

Thresholds against data reports

Alerts (design only)

Transcriptions with simple back-end for demo only.

Sentiment scoring – in simple back-end

Tags

Group tags (design only)

Agent set up with self population

Wallboard x 1 – showing tag level information

Exception wallboard x 1 – to show maximum scores

Two extra bits of numerical data into database

Back end admin to manage customer set up – simple system for demo

**General Design**

Should be designed for business and aimed at Customer Services Managers, who are not technical but very used to using software and so appreciate good design and easy to use systems with no bottlenecks. The system should also work on tablet and smartphone.

**Back End Administration**

1. **Set up accounts/administrators**

The back end requires a section to set up new customers:



The administrator will have full access to all parts of the system.

**Target Scores**

Target scores for wallboards, reports and alerts can be set here and then used as required:



**Extracting Information from Call Manager**

Call Manager will hold all the call routing plans to enable surveys to take place. The platform uses HTTP icons to bring in and send out information about the call. The key information will be:

* Campaign Name
* Callers number (CLI)
* Dialled Number
* Time/Date
* Variable information. There are 10 caller Variables, which can hold a range of information including scores entered by the customer

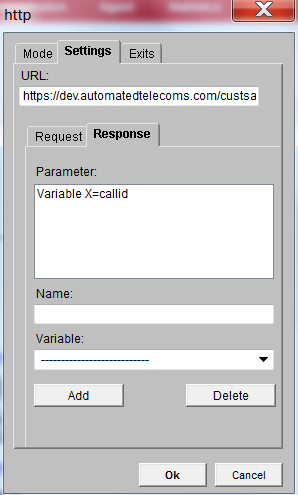
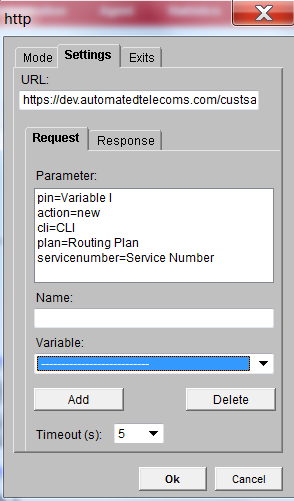


Diagram 1 Diagram 2

ShoutBurst will create a unique ID (see diagram 2) and send it to the system as a Response. This will ensure that every part of the call is tied together and any call scores can be linked. Without this, any simultaneous calls can get scores mixed.

Once the call continues, the system will send key information back to the ShoutBurst system – see diagram 1 above. This will include call scores as they happen and information that provides the link to the correct recording if verbal comments are left.

SB will need to create a database record, bring in all relevant information from the call and then source and upload the call recording which is linked to the record.

When users are created, they will have a PIN number. The call flow will need to interrogate SB, and look for the password. If available, the call can continue. If not, an error message is played.

The agent, other than entering the PIN, will also be able to enter up to two other pieces of numerical information. For example, account number or transaction number. These can only be cursorily checked within the plan (eg number of characters) but the data is held against the record as INFOA and INFOB

Any caller leaving comments will display as a voice file, held in the Call Manager FTP. Details are:

FTP IP: TBC

Login: Same as Call Manager account

Pwd: Same as Call Manager account

If a verbal comment is left by the customer, it will show in call manager as a recording and be held in the FTP ready for extraction. The filename is made up of:

**[Campaign Name]\_[RecordingIdentifier]\_[RandomNumber]**

The campaign name (routing plan) will be linked to the campaign on ShoutBurst and the recording will be identified by the recording identifier linked with the HTTP information from the call plan.



Before each recording takes place, the routing plan will send an HTTP code which is the same as the Recording Identifier. This will allow the system to select the correct recording. Recording Identifiers will vary from 1 – 9 and will circulate, meaning that it is highly unlikely that an incorrect recording can be assigned to the wrong database record.

**Login Page**

The login page will allow three login attempts before disabling the login and asking the user to contact their administrator for help. The system will display an error login message.

Users will be able to request a password reset via email.

**Dashboard**

The dashboard will be able to display any graphical reports that are designated as Dashboard reports when they are built. When accessing the dashboard for the first time, the user will see an empty screen, but will be able to access a dropdown (?) which will show reports that have been set up as dashboard reports. The user can create new reports in the Report Builder, and assign them to be dashboard reports.

After the reports have been selected, they can be dragged/dropped into the correct quadrant to ensure the data is displayed how the user wishes. Each user will have a specific dashboard set up, remembered by the system.

Each dashboard quadrant can be turned into full screen with one click, and then revert back to quadrant style by collapsing the maximised display

Upon login, all dashboard reports will show real-time data and will be refreshed every minute.

See Appendix A for example standard reports available to everyone

**Wallboard Builder**

The wallboard builder will have two sources of wallboard to display. The first is by creating a graphical report and assigning it as ‘wallboard ready’. This means that the report will be available to choose from the wallboard list.

The wallboard must be a graphical report that is set for a changing period – eg today, yesterday, last week etc – so that data is kept updating every X minutes.

Settings for the wallboards should be at wallboard level. These settings include:

* Tickertape off/on
* Axis labels off/on
* Variable Y Axis – off/on
* Y Axis 0 = Target (to allow for plus and minus reports)

The second source of wallboard are created specifically for displaying key data. For phase 1 there will be two main wallboards:

1. A main agent information display wallboard



1. A high-score wallboard that, if activated, will flash up when an agent receives a hi-score. The high-score setting will be set in the back-end administration.



This wallboard will have animation and sound to attract attention and ensure all other agents see the screen. It will take over the whole screen for 10 seconds.

From the wallboard page, a list of wallboards to display can be viewed and selected as required. For all wallboards, other than the hi-score wallboard, selecting more than one wallboard to display will require some additional information:



This will allow wallboards to change regularly and in a way to get the most attention. Change types should include a sound being made and also flashing before the change happens. *NOTE: Should this be admin per wallboard or some sort of central page. I like the idea per wallboard but it might make things a bit confusing. Whatever happens, I guess we will need to have a list of wallboards set up*.

**Reporting**

When accessing the reporting page the user will be presented with a list of reports that they have access to, and the ‘create new report’ button. Reports will be shown in alphabetical order other than the top four, which will be the dashboard graphical reports.

Each existing report will have the ability to run, edit, delete and have the ability to ‘make as wallboard’ and/or ‘make as dashboard’

When running the report, the output will appear in a separate screen with axis, legend and information about the individual entries. As standard:

Pie charts should show summary information – eg a percentage. However, if the pie is clicked on, a new window should show up with the actual data making up that piece of the pie. So if a report is run displaying agent scores over the last month for a certain team, the different pieces of the pie will show the percentage for each agent. Clicking on a piece should show all the calls that make up that piece of the puzzle.

Bar charts should similarly show the raw data when clicked. For example, if one of the bars shows the number of incomplete calls in a day, by cling on this piece of the bar will give the list of all calls that are incomplete.

Data reports will show the columns selected. There should be a default report structure which always includes the information in red, below, if no specific selection is made:

When selecting New Report, the following pop up windows need to appear:

1. Report Details

* Report Name
* Data type (whether data, graph, bar graph, sentiment, wordcloud, pie chart – all available as PDF). See Appendix A for more detailed information
* Start date/time - End date/time OR period ( eg, last hour, today, yesterday, last week, last month etc – these instead of start/end dates),
* Split time (eg Minutes, hours, days, weeks, months)
* Output requirements – on screen, via email, via FTP. Note – if email a modal window should pop up giving space to list email addresses. If FTP, then space to enter all required FTP fields.
* Privacy: Private is for that user only, global is for everyone who uses that account

1. Data Required

* Choose Data to display

- Time/Date

- Campaign

- Dialed Number

- CLI

- Team (Tags)

- Agent Name

- Agent PIN

- Call duration

- Info A (txt)

- Info B (txt)

- Individual scores (up to 5)

- Total

- Average

- Transcribed comments + Audio (and time). A speech bubble icon with modal where comments can be seen and audio played.

- Sentiment

Choose one field as the ‘key field’ and have drag and drop facilities to move data to the right place on the report. In addition, have the ability to set a target value, which will become the Y axis ‘0’, giving reports that can show information above and below the line.

1. Filtering Requirements

* Rules that determine what data is displayed. Eg show Teams a,b and c or show teams a, b and c BUT NOT total scores below 5 This should be as flexible as possible – and be a drag and drop rules builder with drop downs where appropriate to pick multiple data requirements. The data will be specific for each of the customers – so that there would have to be a team a,b and c for them to be given as options.
* The word Target can be used instead of a number. The system will assign the most appropriate target to use. For example, a survey quantity report that is shown for a day could look like this:



* Thresholds: If a data report, against each rule, we need to be able to add a threshold rule that does not affect the output of the report but highlights any entry that breaks that rule – eg Highlight in [select colour] when the score exceed 6.
* Options include:

- Campaign - drop down/multi-choice (populated from back-end)

- Dialed Number - drop down/multi-choice (populated from back-end)

- CLI - \*could be searched via free text field\*

- Team (Tags) - ability to multi-select tags

- Agent Name - drop down/multi-choice

- Agent PIN - drop down/multi-choice

- Call duration - period of time. Maybe a slider like is used on CM

- Info A (txt) - \*could be searched via free text field\*

- Info B (txt) - \*could be searched via free text field\*

- Individual scores (up to 5) - Ability to search with < > = or between

- Total  - Ability to search with < > = or between

- Average  - Ability to search with < > = or between

- Transcribed comments + Audio (and time). A speech bubble icon with modal where comments can be seen and audio played. - need to look at number of seconds < > etc, with comments or without and also a free text box separate to the main one

- Sentiment  - Ability to search with < > = or between

1. **Output Design**

* Colour of background
* Colour theme of charts (eg multi-colour, shades of red etc)
* Gridlines (Yes/No)
* Show target baseline (Yes/No)
* Save Report, Run Report, save & Run Report buttons

When a report is output, there needs to be the ability to print the report or PDF the report or PDF the report and send it via email. There also needs to be an edit button to return to the report structure and make small changes as required, ideally in one window to save going back through all selection screens – and with a button that will open a modal pop-up to switch columns on/off

We would also have targets/sla's that would be entered against graphical reports, so that performance against target would be shown, which will be a more dynamic way of showing data and give a graph where negatives can be shown (against targets). Graphical displays will include colour pickers and the ability to upload a logo. An example might be:



There would be a ‘hide’ data button for administrator use only. This would be a search screen that would find and then remove the records into a separate store, where they would not be counted towards the totals, but would be able to be reported on and would never be deleted. Examples would be test calls. When hiding a call, a reason will need to be given.

There will be a ‘review’ button where a record can have text added to explain why it was a particular score or why the agents made the comments. Reviewed entries will be shown differently.

**Alerts & Thresholds**

An easy to use alert system that will send email and/or SMS as required. The alert system will work in the following way:

1. Nominate a dataset to be monitored – eg Total score, question score, Total surveys
2. Select a time period for the review – eg as it happens, per hour, today
3. Nominate a level and an operator – eg Greater than 4 or Less than Target
4. List actions: Send EMAIl and SMS
5. Enter email addresses and SMS numbers

Alerts should be able to be copied and then edited

**Transcriptions & Voice**

For accounts that have the ‘Transcribe’ tickbox ticked, transcription of records will need to take place.

For phase 1, we will need to create a simple transcription page for a single transcriber to use.



Each recording will show in turn, oldest first. The transcriber will click on the playback icon and transcribe the text. They will also choose a sentiment score and choose if the caller is female or maile. When the submit button is clicked, the system checks to see if the data is available. There also needs to be a minimum number of characters per 10 seconds of voice recording (to be agreed) and a sentiment and caller ID radio button must be selected.

When submitted correctly, the transcribed text, and sentiment information is assigned to the database record. The screen is cleared and the next recording loaded. If no recordings are available, a message should be displayed instead of the Playback icon.

As part of the reporting we will need to display the voice file and transcription if comments left and also include the length of the recording in seconds. The record will also change to ‘played’ when it has been played by the user – so reporting will be able to show just new recordings or all.

**Hierarchy**

Tag Setting

Instead of having any kind of hierarchy, the system will be able to assign data into tags, allowing data to be more representative and to aid in-depth reporting. Administrators and managers need to be able to set tags and add them into group tags to make reporting simpler and more powerful.



When a tag is created, it should be displayed as an entry within the report builder to be selected as required.

**Group Tags**

Group tags are collection of ordinary tags. Once ordinary tags are set up, they are available to collect together in a group tag. For instance, each team can be a Tag, and ‘all teams’ can be a Group Tag



Once a Group Tag is saved, it will display within the report builder. Group tags will have a different design/colour than ordinary Tags.

**Agent Set Up**

The system will have an ‘Manage Agents’ tab, only available to the administrator [and nominated personnel?]

* + name
  + email
  + password (and generate password button)
  + upload photograph (optional)
  + choose a sound or upload new one
  + Teams/Campaigns/Tags
  + [Access Level] – from User, Manager, Administrator

We need a CSV upload and download also to enter in multiple agent data and to download all current information to be easily edited.

The administrator will create/delete/edit logins as required. Each user will have a PIN and these can either be assigned or generated by the system. The email field will be mandatory as used for reset password.

Every user, no matter their level, will have a login. For user level, they will only be able to access and manage data about themselves, and will not have the ability to manage users, create/manage wallboards or do any other administration tasks. For managers, they will be able to access everything other than the back-end administration section.

**Appendix A**

**Types of Report - examples**

1. Comparison report.

Definition: To compare like for like over a given period of time

Settings: Campaign (multiple select), Team (multiple select), Agent (multiple select)

Time: Day, week, month, year

Output: question scores, total scores, average scores, maximum scores, incomplete

surveys

Output type: Bar chart – to also include average baselines

1. Trend report

Definition: To compare the performance of one entity over a given time period.

Settings: Campaign (individual select), Team (individual select), Agent (individual

select)

Time: Day, week, month, year – split by period – hour, day, week, month.

Output: question scores, total scores, average scores, maximum scores, incomplete

surveys

Output type: Bar chart – to also include average baselines

1. Word Cloud/Sentiment Report

Settings: Campaign (multiple select), Team (multiple select), Agent (multiple select)

Time: Day, week, month, year

Output: Word cloud from transcriptions, number of positive, number of neutral,

number of negative sentiment scores (plus percentages)

Admin: need to be able to include/exclude words and phrases

Output type: Word cloud and pie chart

1. Scoring Chart

Settings: Campaign (multiple select), Team (multiple select), Agent (multiple select)

Time: Day, week, month, year

Output: Individual question scores

Total score

Average score

NPS score

Output Type: Designed wallboard to show off scores in the best way possible. Ideas include thermometer, dials, graphs, something climbing up. Ideally need to have some movement to make it stand out. Have a reset every X minutes to remove and show the numbers moving back to the same position.

1. League Table Wallboard

Settings: Campaign (multiple select), Team (multiple select)

Time: Hour, day, week, month

Parameters: Average scores, survey count, maximums, incompletes

Output: League tables - with variable number of names (team or individuals)