Supervision

User manual

Index

Introduction

What is supervision?

Supervision is a productivity tool made to help using your office phone. Supervision does not replace your regular physical phone, but extends its capabilities by using your computer to transfer a call, put on hold, park, search in a phonebook, …

Setup & compatibility

Supervision does not need any installation nor complex setup, and work with a HTML5 browser: the software is shipped with your Xorcom IPBX and can be accessed by 2 different ways:

- By typing the URL in the browser address bar (ex: http://192.168.5.150/supervision)
- By using the Complete IPBX User Portal shortcut.

Supervision is compatible with the majority of web browser, particularly:

- Firefox
- Chrome
- Safari

Connection, theme, language

To use supervision the user must have a login and password. These credentials are created by the telephony integrator or the person responsible of the IPBX setup.

The connection page allows you to choose a language and display theme. Changing the theme or language does not change functionalities of the software, and only impact cosmetic of the GUI. Changing theme and language is applied immediately and saved in your browser memory.

The "Save credentials on this computer" checkbox write the login and password information in the browser local storage and will help you speed up your next connection.

> Language, theme, login and password are saved in the local storage of the browser. These data are not sent to any server and are only available on the same computer/browser. On next login, if the user uses another browser or computer, these data will not be restored.

Ready to connect

When the login page is completely loaded, a message will tell you if the software is ready to be used. Seeing "Connected, ready to work" message means that the user can now use his login/password to log in Supervision. If you see an error message, or if the "loading" message is displayed for a long period, update the page by pressing F5.

Main GUI

Content and information displayed
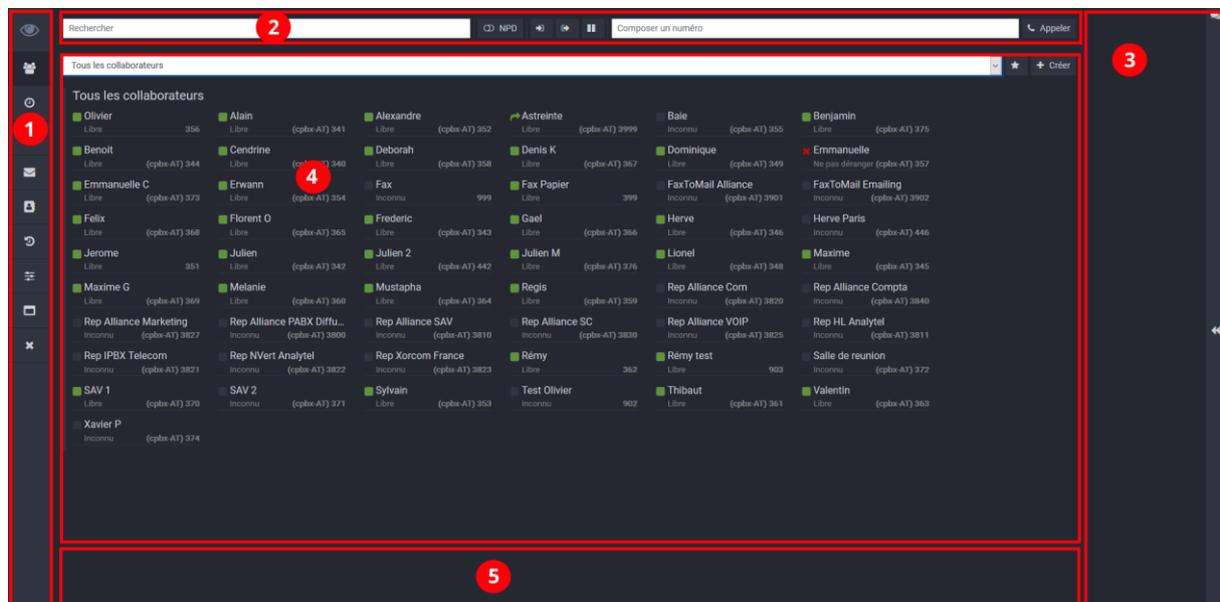
Supervision GUI is divided in 5 different parts:

The left menu ① let you navigate through 7 different panels (coworkers, queues, conferences, voicemail, phonebook, history, settings).

The top bar ② is visible on all panel and is fixed. You can use it as a shortcut for some functionalities like searching in the panel, going to do not disturb, login/disconnecting from queues, using pause feature, and calling a number. The Search bar let your search any information displayed in the main panel ④

The right lateral bar ③ contain the call list currently on your extension and the chat panel.

The main panel area ④ contain the information of the currently chosen panel from the left menu ①.

The bottom area ⑤ is dedicated to parked calls: all parked calls will be displayed there.

Color codes and system messages

During the time the user use Supervision, different messages will appear in the bottom area of the screen. The color tells how important this message to the user is:

- **Green**: Indicate that the last command was successful
- **Blue**: Give generic messages, tells what the system is doing right now (loading, etc.)

- **Orange**: Tells the user that something bad is happening like a warning or a non-critical error.
- **Red**: Tells the user that a critical error happened or that the latest command failed.
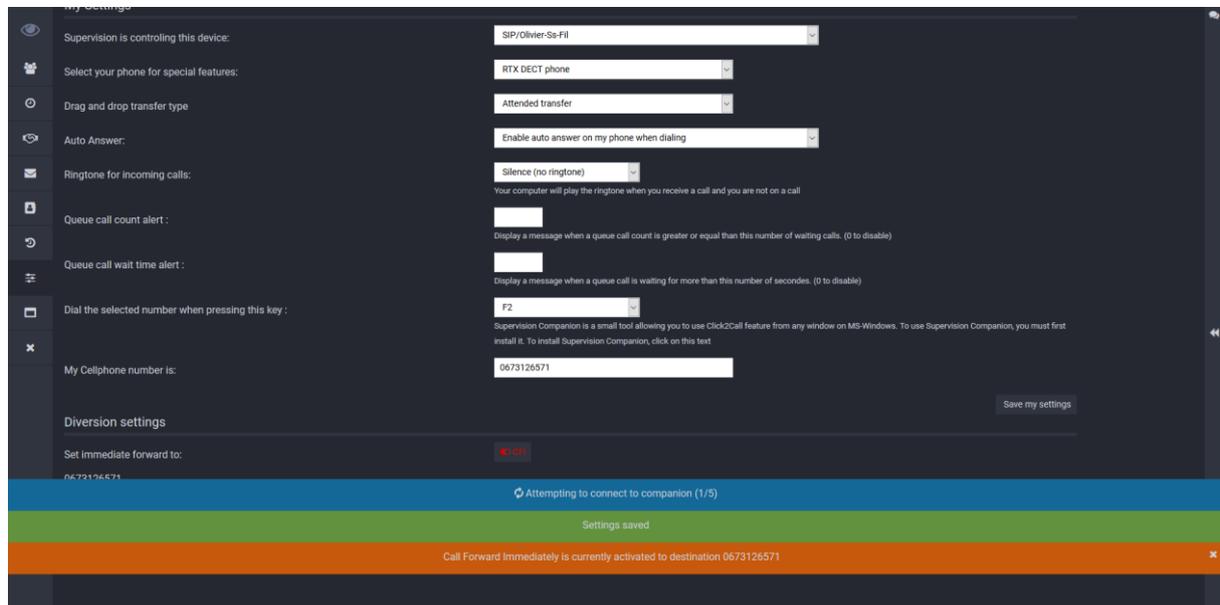
Lateral left menu

The lateral left menu let you navigate through 7 different panels. When the user clicks on an item, the data from the panel will be displayed in the main area of the GUI.

Available panels are:

- **Coworkers**: Display all the IPBX extensions, their status, and let the user do actions like calling, spying, barging, …
- **Queues**: Display queues, call waiting in the queues and agent status
- **Conferences**: Let the user manage audio conferences.
- **Voicemails**: Display voicemail messages and let the user listen it from their phone.
- **Phonebooks**: Give access to the IPBX phonebooks.
- **Call history**: List all the user calls, let user search through call history and listen recorded calls.
- **Settings**: Display user settings and let the user activate call forwards.

Specific icons for administrators are also displayed, only when the logged in user has administration rights.

- **Users**: Let user manage users (login, password, rights…)
- **Profiles**: Profiles are used to limit what a supervision user can see and can use.
- **Pauses**: List and manage pause reasons.

2 specials items are also displayed:

- **Full screen toggle**: Let user toggle between full screen and window mode (same as pressing F11 in browser)
- **Logout**: Exit from supervision.
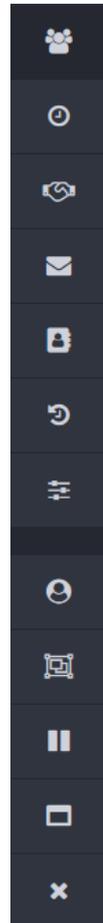
Coworkers

Coworker panel list all the extensions of the IPBX, the current status of each extension, the name of the extension user, the internal number, and give access to actions and commands depending of the status of the extension.

Each coworker is displayed using this template:

- First line
    - o Status color code
    - o Extension name
- Second line
    - o Status string
    - o Extension internal number
    - o Name of the distant IPBX (if InterAmi is used)
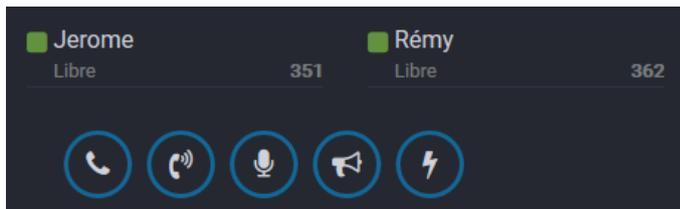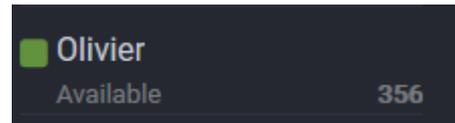
Clicking on a coworker display an action menu with different items depending of the extension status. Action items are listed in the table below:

Action item	Visible when extension state is…			
	IDLE	**Ringing**	**In a call**	**DND**
Call	✓	✓	✓	✗
Spy	✗	✗	✓	✗
Whisper	✗	✗	✓	✗
Barge	✗	✗	✓	✗
Intercept	✗	✓	✗	✗

⚠️ Some functionalities (spying, whispering, barging) can be disabled by the administrator in the IPBX configuration.

Extension status color code

The extension color code let the user know quickly the state of the devices of the extension. Color used are:

- **Green**: Extension is idling, ready to be called or to call.

- **Orange**: Extension is currently ringing (on incoming call only)
- **Red**: Extension is already on the phone, or is busy
- **Gray**: Extension doesn't have any device attached or connected
- **Red cross**: Extension has DND state on

Coworkers groups

By default, all coworkers are listed in a group named "All co-workers". User can create groups of coworkers to reduce the amount of displayed extension, or to create hierarchy.

When clicking on the "New" button, the creation form appears.

Adding a coworker to the group is made by checking the box in front of his name. To remove the coworker, uncheck the box.

By clicking on "Validate", the group is saved for the current user.

User can choose to share his coworker groups by checking the "set this group as inheritable" box. (it's necessary that the administrator allow the user to share his groups. See "Supervisor")
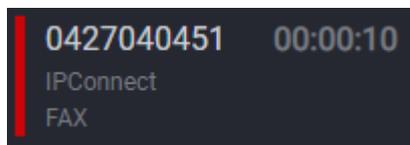
 By clicking on the star button on the right of the group selector, the user can set a group as favorite. This group will then be automatically displayed when opening supervision.

Call management

Call related to the extension of the user are displayed on the right lateral bar of the GUI. Calls are stacked vertically and sorted depending on the age of each call.

Call display contain a status color code, the number of the caller/recipient, the duration of the call and the contact name (if known)

The status color codes are:

- **Orange**: Ringing
- **Red**: Answered, in communication
- **Blue**: On hold

Call action

User can interact with call using 2 different ways:

- By drag and drop, used mainly to transfer a call
- By clicking on the call to open the action menu

Call action menu

Clicking on a call open the action menu. This menu contains the following icons:

- Answer call (when ringing)
- Put on hold/retrieve (only after answer)
- Hang up/reject
- Transfer call
- Add/edit phonebook contact entry
- Add/see call notes
- Send DTMF
- Mute/Unmute
- Record call (only after answer)
- Park calls

Some icons (answer/hold/retrieve) are only displayed when a compatible device is selected. User must select the brand of his phone in the supervision settings. Record function can only be used if user is authorized to do "on demand recording".

Call transfer by call action menu

Transfer can be initiated with call action menu.

After clicking on the transfer button, a select box will appear. You can select any contact, coworker or enter a free number.

Call transfer can be done using blind transfer or attended transfer. Blind transfer consists of sending the other party to a destination without checking first if the destination is ready to accept a call. It means that the call can be transferred to a busy destination. Attended transfer consist of first calling the destination (called consultation call) and then transfer the call if the destination agrees.

Choice to do blind transfer or attended transfer in supervision is done in Settings panels.

Call transfer by drag & drop

Call transfer is done using drag and drop of the call to a destination. Possible destinations are:

- Coworkers
- Queues
- Phonebook contact
- Voicemail
- User cellphone
- Conference

Call transfer can be done using blind transfer or attended transfer. Blind transfer consists of sending the other party to a destination without checking first if the destination is ready to accept a call. It means that the call can be transferred to a busy destination. Attended transfer consist of first calling the destination (called consultation call) and then transfer the call if the destination agrees.

Choice to do blind transfer or attended transfer in supervision is done in Settings panels.

Attend transfer are only compatible with coworkers and phonebook contact. Transfer to other destinations are automatically converted to blind transfer.

⚠ To use attended transfer, IPBX administrator must set a special configuration. If this configuration is not available, the transfer will be automatically converted to blind transfer.

How to set up IPBX for attended transfer

To get attended transfer working, IPBX administrator must create a special configuration using "Dial profiles". A specific "Dial profile" must be created for extensions, and another one for trunks.

The trunk Dial Profile must allow call transfer by caller. Administrator must then set this Dial Profile to each trunk used for outbound calls.

Name *	DialProfileTrunk	
Allow Transfer By	Caller	⌄
Allow Park By	Caller	⌄

Extension Dial Profile must allow transfer by recipient. This Dial Profile must then be selected for all extension using Supervision.

| Name *	DialProfilExtensions	
Allow Transfer By	Recipient	⌄
Allow Park By	Recipient	⌄

⚠ Never create a Dial Profile allowing "both" sides to do call transfer. Doing it can lead to call piracy. The trunk dial profile must allow transfer only by caller, while the extension dial profile must allow transfer only by recipient. This configuration must be done by a technically advanced administrator.

Call parking

Parking consist on putting call on hold in a special area in the IPBX. The other side head hold music, while the user device is freed (the call is not on the user device anymore)
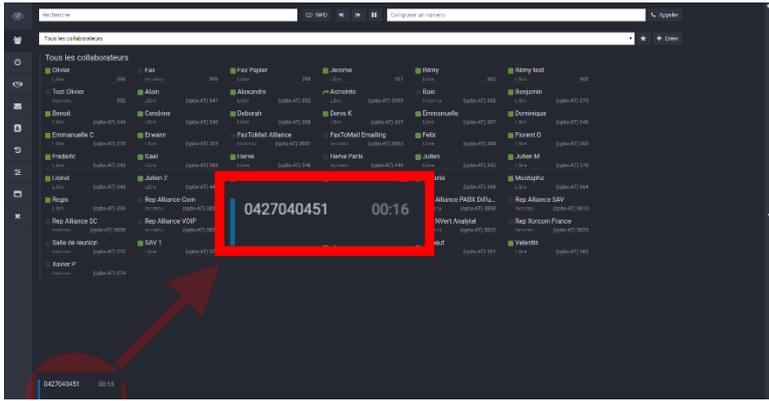
Parking lots are defined by special numbers. Dialing a parking lot number let user retrieve a call waiting in the lot.

Supervision simplify the way parking lot are used by displaying call parked on the bottom of the screen.

⚠️ Call parking need special right in Dial Profile (like attended transfer). IPBX Administrator must enable these rights to allow supervision users to use this function.

How to set up IPBX for call parking

In order to use call parking, IPBX administrator must create a specific extension/trunk Dial profile (one for each)

The trunk dial profile must allow the park by caller. This dial profile must then be selected in every trunk used for outbound calls.

Name *	DialProfileTrunk
Allow Transfer By	Caller
Allow Park By	Caller

Extension dial profile must allow park by recipient and must be selected for every extension of supervision user.

Name *	DialProfilExtensions
Allow Transfer By	Recipient
Allow Park By	Recipient

ℹ️ In order to use both attended transfer and call parking, we suggest you create one dial profile with correct authorizations. This configuration must be done by technically advanced IPBX administrator.

Transferring call to voicemail or user cellphone number

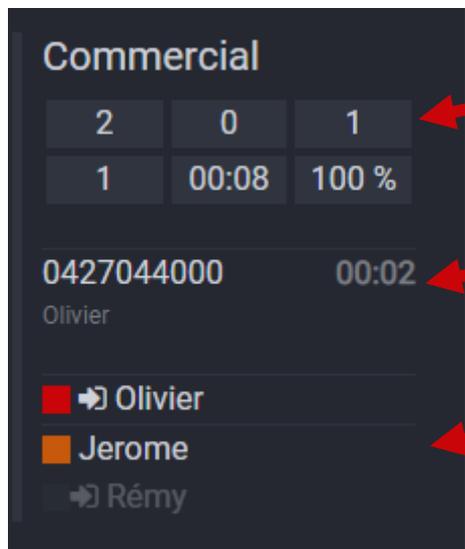Supervision users can transfer ringing or established calls to voicemail (if enabled) or to their cellphone number (if defined in supervision settings).
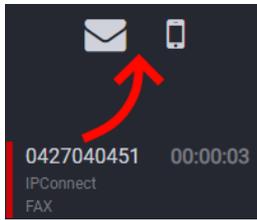
To transfer the call, start drag and drop, new icons will appear on top of the call list. First icon sends the call to user voicemail, while second transfer the call to user cellphone. No icons are displayed if voicemail is disabled and cellphone number is empty.

Queues

Queue are displayed in this panel. Each queue contains 3 different kind of information.

 Queue name and statistics

Calls waiting in the queue

Agent of this queue

Queue statistics

Queue statistics displayed are "per queue" and are (from left to right, top to bottom):

- Successful call count since 00h
- Failed call count since 00h
- Current waiting call count
- Available agent count
- Average wait time in the queue
- Percentage of successful calls since 00h

Agents

Each agent is identified by their name, the status (displayed as color code) and an optional icon.

Status color code for agents are:

- **Green**: agent available, ready to take a call
- **Orange**: agent currently ringing
- **Red**: agent on a call or busy
- **Blue**: agent paused

An optional icon is displayed if the agent is dynamic. Dynamic agents can be logged in or logged out of the queue. Non connected dynamic agents are displayed in light gray.

Call waiting in the queue

Each waiting call is displayed with the caller number (if known), the time spent waiting in the queue, and the caller name (if known).

Queue interaction

User can interact with queue by 3 different ways: by clicking on the queue name, clicking on a call, or clicking on an agent.
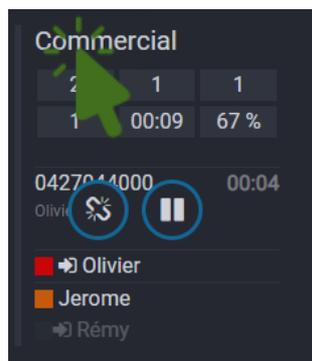
Click on name	**Click on call**	**Click on agent**
• Login/logout of this queue (current user) • Switch to pause/get back to work	• Intercept call	• Login/logout this dynamic agent • Switch this agent to pause/get back to work.

Depending of the status of the user, different queue interactions are available.

A "normal" user can:

- Login/logout from a queue if this user is dynamic agent of the queue
- Switch itself to pause/get back to work
- Intercept a call from any queue

A "Supervisor" user can:

- Login/logout any dynamic agent from any queue
- Switch any agent to pause/get back to work.

Intercepting/redirecting calls from queue

Intercepting calls from a queue is possible for any supervision user, even if this user is not an agent of the queue. Redirecting a call allow the users to quickly take someone waiting in the queue (like VIP customer for example)

BUT: intercepting a call from the queue will increase the failed call count of this queue. Using this feature can badly change statistics of the queue. Use this feature only when statistics are not used, or for exceptional cases.

> ⚠️ Remember that intercepting a queue call will increase the "failed" call count of this queue. Use this only when statistics are not used or exceptionally.

Login/logout from every queue

The morning and evening, users will eventually login/logout from every queue. This can be done using the top bar menu.
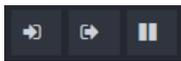
Using the buttons [icons] of the GUI top bar, the user can do (in the same order as displayed)

- Login to every queue the user is a dynamic agent
- Logout from every queue the user is logged as dynamic agent
- Switch to pause/get back to work to/from every queue the user is logged in.

Switching to pause show a "pause reason" menu. The user must select the pause reason to enable pause. Pause reasons let administrator get statistics on pause durations of agents. Pause reasons can be modified by administrator.

Conferences

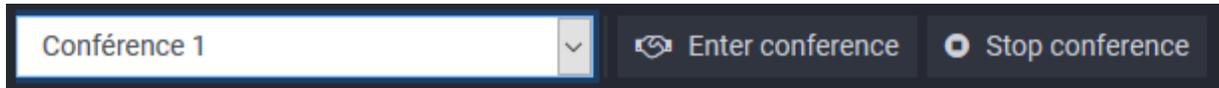Supervision let users manage audio conferences by displaying conferences rooms, conferences members, adding member dynamically, muting people…

Selecting a conference room is made from the conference selector.

The conference selector contains only conferences created in Complete IPBX 5 GUI. Si no conference room exists, please contact your integrator to set it up.

Conference member

Conferences has a predefined number of seats. Every seat is displayed as a square box. When a seat is empty, the box contains the "+" symbol. When the seat is occupied by a conference member, the member information is displayed:
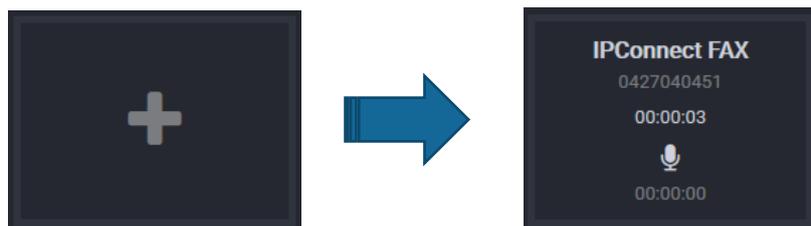
- Member name (if known)
- Member number (if known)
- Duration since this member joined this conference
- Icon showin if the member is mutted or is talking
- Talk duration of this member (only if enabled in CIPBX5 options)

Adding a member

Adding a member can be done using 2 ways:

- By clicking on an empty seat
- By transferring a call using drag and drop on an empty seat

Clicking on an empty seat is the most convenient way to add a member. After clicking, a form will ask for the member number, or to select a phonebook contact from a
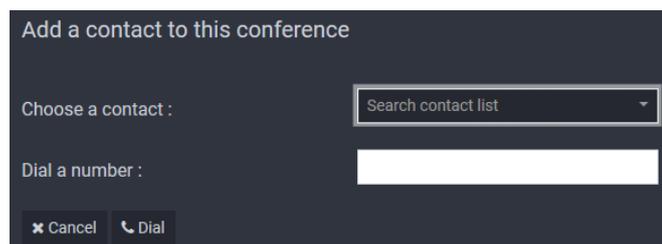
list. User can even search the name of the contact in the list.

Mute / kick member

At any time, the conference administrator can mute a member, unmute him and kick him out of the conference.

A muted member is displayed with a crossed microphone. Kicking out a member hang up the member call.
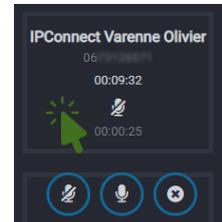
Important information regarding conferences

- Stopping conference using "Stop conference" will hang up all members call without notice.
- Muted members are not aware of their status. You should first tell them that they cannot speak anymore.
- Detecting talk time only work if this option is configured in Complete IPBX 5 GUI.
- Talk time duration is updated when the conference member stop talking.
- You can transfer a call in the conference using drag and drop, but only the distant party will be transferred. Local user must join conference manually.
- Adding a conference member can take up to 30 seconds, time to call the member, get the answer state, etc. Be patient.

Phonebook

Complete IPBX 5 phonebook are displayed in this panel. Editing a contact from a phonebook is immediately shared with other supervision users.

Phonebook entries contains:

- Name of company
- Name of contact
- Surname of contact
- Office number
- Mobile number
- Other number
- Email

User can search contact using the search bar in the top bar.

Creating/editing a contact

User can create contact by:

- Clicking on the "New" button in the phonebook panel
- Clicking on the "Edit contact" button in the action menu of the current call.

To create a contact, user must at least provide a name (or surname) and 1 phone number.

Calling a contact

User can call any contact by clicking on a phone number in the contact table.

Call history

Call history contain calls emitted or received on the devices of the current user. Calls of other users are not displayed. The call history table can be sorted using the call type, call status, number, …, by clicking on the header of the table. Call history is updated automatically at the end of every call.

Filtering, searching call

User can search a call in the history using the search input on the top bar. User can also use the provided form to filter results by date, type, status.

Call can be made by clicking on a phone number in the history table
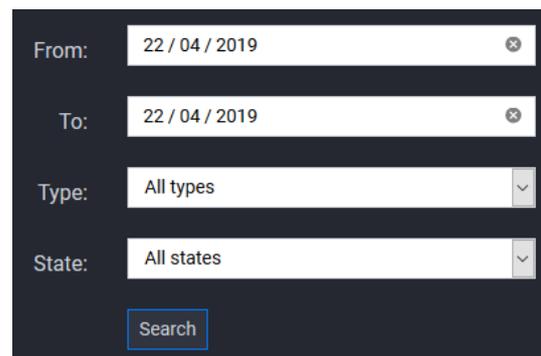
From:	22 / 04 / 2019
To:	22 / 04 / 2019
Type:	All types
State:	All states
	Search

Calls are categorized using their type

- Internal call
- Outbound call
- Inbound call

And by their state

- Answered call
- Failed call

Call recording

User can listen their call recordings by clicking on the button in the table. Calls without this button don't have any records. Listening a recording is made on the phone of the user.

Call notes

Icon is displayed when the call contains one or more call note. User can read the notes by clicking on it. It's not possible to edit/add call note from the history.

Voicemail

If the user has a voicemail box enabled, and if voicemails are not deleted after being sent by email, the user can check the list of voicemail calls and listen recording on their phone.

Reading, deleting

Listening a voicemail can be done by clicking on the ▶ button. The ✉ button move the current voicemail to the "old" folder (or back in the "new" folder, depending of the current state of the voicemail). Deleting a voicemail is done by clicking on the ♻ button.

User settings, call forward

The setting panel let the user modify the way Supervision works, set alerts, change how transfer are made, and choose the used phone.

Supervision use the Device/User mode of Complete IPBX 5, and let the user choose his preferred phone. After selecting a phone, all interactions will be made on this specific phone. The user must select at least one phone. If no phone is selected, supervision will ask the user to choose one on next login.

In contrary of language and theme, which are locally saved in the memory of the user browser, the settings set on this panel are stored in the IPBX and loaded on login independently of the computer/browser.

Settings

Available settings are:

Supervision is controlling this device	User must select their preferred phone in this selector. All call will be made on this device.
Select your phone for special features	Select here the brand of the user phone. If the phone is listed in this selector, supervision will add specific features like answer button, hold, mute…
Drag and drop transfer type	Select here the default transfer type preferred by the user.
Auto Answer	By choosing "Enable auto answer on my phone", the phone will automatically answer outgoing calls made using Supervision. This DOES NOT enable auto answer for incoming calls.
Ringtone for incoming calls	The computer can plan a ring tone on incoming call. Select the preferred ring tone here.
Queue call count alert	Display a visual alert when a queue contains more than the call count inserted here.
Queue call wait time alert	Display a visual alert when a queue contains a call waiting more than the number of seconds inserted here.
Dial the selected number when pressing this key	Enable supervision companion and let the user use Click 2 Call features.
My Cellphone number is	Set the user cell phone number. User can then transfer a call on their own cell phone.

Call forwards

Supervision let user enable/disable call forwards (immediately, on busy, on no answer) by clicking on the ⬤ buttons.

Enabling an immediate forward (CFI) send all incoming calls to the selected destination.

Enabling a busy forward (CFB) send incoming calls to the selected destination when the user is already on the phone (disabling the voicemail in this case)

Enabling a no answer forward (CFN) send incoming calls to the selected destination when the user doesn't answer a call after a predefined amount of time. If the user has a voicemail enabled, setting a CFN will temporarily disable the voicemail.

Supervision companion

Companion is a tool made to help dialing numbers from outer software (Excel, Word, browser, …). Companion is compatible with any computer running windows 7 or more.

Installing companion is fast, simple and easy: click on the text below the "Dial the selected number when pressing this key" setting, download and execute the file, and follow the window instruction.

After being installed, companion will automatically start with windows. User must reload Supervision after installing companion to get it working the first time. When running, companion is displayed as a small Supervision icon in the systray.
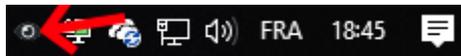
Chat (IM)

Chatting with other users can be made using Supervision Chat tool. Currently connected users are displayed on the right bar. This bar is hidden by default, user must click on the 2 arrows to show/hide the bar content.

Messages can only be sent to connected users. A connected user receives instantly the sent messages. When opening a chat box, latest 24h messages are displayed as history.

URL, Icons

Sending an internet address in the chat is automatically converted to valid URL. The user can also send icon showing their current mood by typing specific characters, defined in the table below:

Characters	Substitution
:)	😊
:(	😣
:D	😄
:p	😜
:/	😖
:'(	😢

User can also send Unicode icons.

User administration

Administrator must create user prior to any use of Supervision. Every user contains at least a login/password and some optional settings like extension number, parking lot, profile…

Administrator users get access to the user administration panel.

Creating/editing a user

After being connected as administrator, to create or edit a user, the administrator clicks on the ![icon] menu item.

The first selector let administrator choose between creating a new user or editing an existing user.

Every user login must be unique. Password must contain at least 8 characters, with 1 lower cap, 1 upper caps, and 1 special char between **!@#$&*-_**

Setting user extension let the user use any phone associated with this extension. In case of the administrator did not set any extension number, supervision will work with limited features.

Choosing a different parking lot depending of the user let the administrator create different company services/usages. Users with the same parking lot can see parked call and intercept it but cannot see calls from other parking lots.

Choosing a profile let administrator limit user rights and line of sight. Profile contain list of information displayed on the user screen.

⚠ A supervision user cannot be administrator. Administrators have call functions disabled. They cannot spy, whisper, call, login/logout people from queues, etc.

Automatic creation

IF a user connects to supervision from the user portal of Complete IPBX5, a user account will be automatically creating with the user extension as login, and random strong password. The user can then change the password or connect from the portal.

Administrator can then edit the auto created user and set profile, parking lot…

User profiles

User profiles let administrator limit line of sight and authorization of the users using this profile. A profile let administrator create pool of users depending on their competences, the company service of the user, etc.

Each profile let administrator set list of visible coworkers, queues, conferences. Profile let also administrator set rights on the conference's management, and the inheritance of coworker groups.

In a call center profiles can be used to create pool of users. A supervisor can be chosen for every profile: this specific user has more authorization in queue management and can login/logout/pause queue members.

Creating a profile is easy: set a name, check every visible coworker, queues, conferences. In case of the profile must see everybody, administrator can check the "All existing and new" box. Checking this box is different than checking all box: when checking all coworker box (for example), on the existing users will be visible. New users will be invisible. Checking the "All existing and new", every new coworker creating in the future will also be seen.

⚠️ If you want all future extension, conferences, queues created be visible of the profile users, check the "All existing and new" box.

Coworker group inheritance.

As stated in the "Coworker" chapter, a user can create coworkers' groups and mark groups as shared. These groups will be visible from all users of the same profile if the user is selected as the group inheritance.

Inherit public groups from	Don't inherit group ▾

Supervisor

Supervisors are users with more queue authorizations: they can login, logout, pause any member of the displayed queues. This setting is usually used in call center area.

Profile supervisor	No supervisor ▾
	Who is the supervisor ? Supervisor is a specifi user with extended rights on other members of this profile. He's allowed to login/logout/pause/unpause agents from a queue.
	Important note: the supervisor MUST be part of this profile. don't forget to set this profile on the supervisor user.

Pause reasons

When a user is a member of queues, he can switch to pause. Paused user don't receive any calls from queue. Users must select a pause reason when going to pause. Administrator can create multiple pause reasons: these reasons will be shown in compatible statistics software.