CONTACT CENTRAL – +++ CLIENT +++ COUNCIL
USER GUIDE FOR

++CLIENT++

Version: 1.00

Contents

- PART 1 -
GENERIC PROCESSES AND USAGE

Presenting Contact Central Copeland on Siebel 7

The aim of this section is to present the new look and feel of the Contact Central solution for Copeland Borough Council. Indeed, the upgrade of the Contact Central product family to a Siebel 7 environment has induced a different outlay and look and feel. A large number of additional functionalities are available and can be enabled at any time. This being said, the core of the product and its logic remain.

We will therefore explain these evolutions, outlining where standard functionalities can be found in the Siebel 7 based interface. Afterwards, a high-level presentation of the amended or extended features of the product will be made.

Contact Central fundamental terminology and concepts

We will start by defining key concepts from Contact Central that will then be used along the document and during the training session. It is essential that you read them in order to understand the explanations that will follow.

Contact Central Enquiries

The Contact Central solution for Copeland is based around the central concept of **Enquiry.** An Enquiry represents an inbound request made by a citizen, using phone or email.

Technically, an Enquiry is a Contact Central Activity that will be followed by others as the process progresses, particularly in the case where a Service Request is opened along the Enquiry.

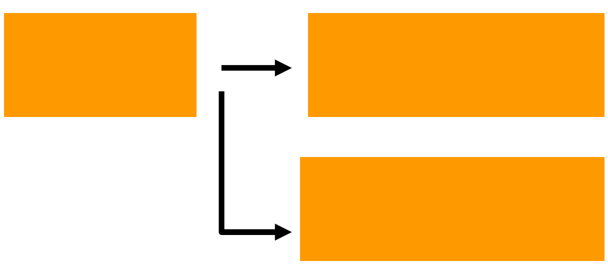
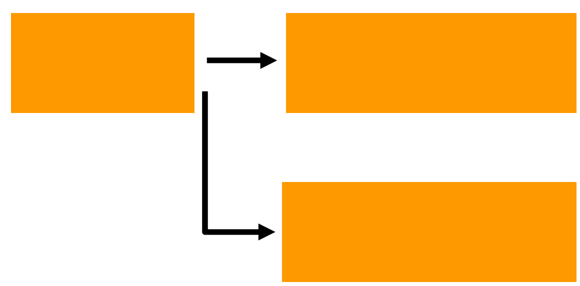
Service Requests

An Enquiry made by a caller may :

- Either be resolved during the call, and closed as soon as the call is finished
- Or need further actions

In the case of the second option, the Enquiry will be followed by a **Service Request.** A service Request is like a file that will contain all the Activities conducted so that satisfactory resolution of the Citizen's demand may be obtained. The Service Request will have its own type, that will correspond to the nature of the resolution in progress.

The chart below summarises, at a high level, the terminology differences between the legacy Contact Central solution used by Copeland Borough Council and its updated equivalent:

Terminology comparison between the Contact Cetnral solutions for Copeland Borough Council	
SIEBEL 6 BASED CONTACT CENTRAL:	SIEBEL 7 BASED CONTACT CENTRAL:
	

Relationship between Enquiries and Service Requests

The relationship between Enquiries and Service Requests depends on whether or not a Service Request is opened aganst the Enquiry:

- It the Enquiry does not need a Service Request, no relationship needs to be created
- If a Service Request, the Enquiry, which is in fact an Activity record, will be attached to the Service Request and become the first action of all those carried to resolve the citizen's Enquiry. It will have a particular type depending on how the Enquiry was presented:
    - **Call-Inbound** Enquiry made over the phone
    - **Email – Inbound** Enquiry made by email

Modified and enhanced functionalities

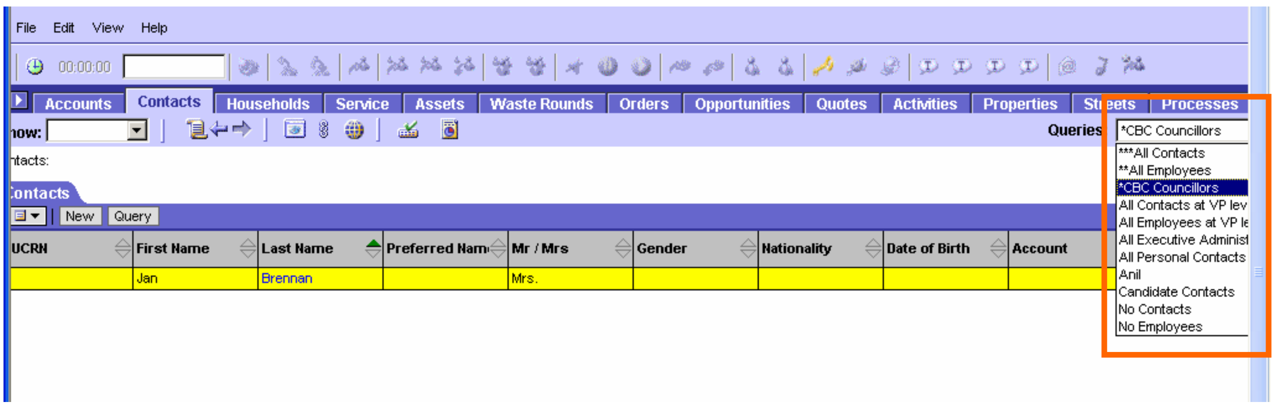
This section presents:

- The functionalities that have been modified between the 2 versions of the Contact Central solution for Copeland
- The new features that the solution makes available

Predefined Queries in the CONTACTS tab (Employees and Councilors)

In the **CONTACTS** tab, some standard predefined Queries are available for you to obtain the list of Employees and Councilors:

- Navigate to the **CONTACTS / All Contacts** view
- Select ****All Employees** or ****CBC Councilors** to obtain the appropriate list



Contact Central Activities

Activities will play a much more dynamic and proactive role in the new version of Contact Central for Copeland. Whereas, in the past, Activities were merely the trace of the actions carried in the system, with he ability for users to check past actions, the new version will insist on Activities to be carried so that the Enquiries made by citizens may be addressed.

In the new version of Contact Central, you will therefore find yourself creating Activities to be done, assign them to yourself and others, and update the status of automatically generated Activities to indicate that a particular piece of work has been completed.

Please refer to the section **Managing Activities and Activity Plans**, where the usage of Activities is discussed in detail.

Streets (replacing Addresses)

The new version of Contact Central for Copeland uses a library of addresses that comply with the UPRN and the BS7766 standard. This will :

- Ensure that address records and are not duplicated and that enquiries are not conducted several times (example: in the case of an abandoned bulky item reported several times)
- Allow Agents to reduce their data entry by looking up addresses instead of having to key them in

So, any association to an Address record will go through a query rather than an entry in the new version of Contact Central for Copeland.

New features

The new Copeland system pre-built knowledge base containing important information that can be augmented by local information, can be quickly accessed by Contact Central +LG's powerful search engine. Using the +LG search facility, which is case sensitive, agents can locate information relevant to the current enquiry. Agents can also use the **Keyword Search**, which is case insensitive.

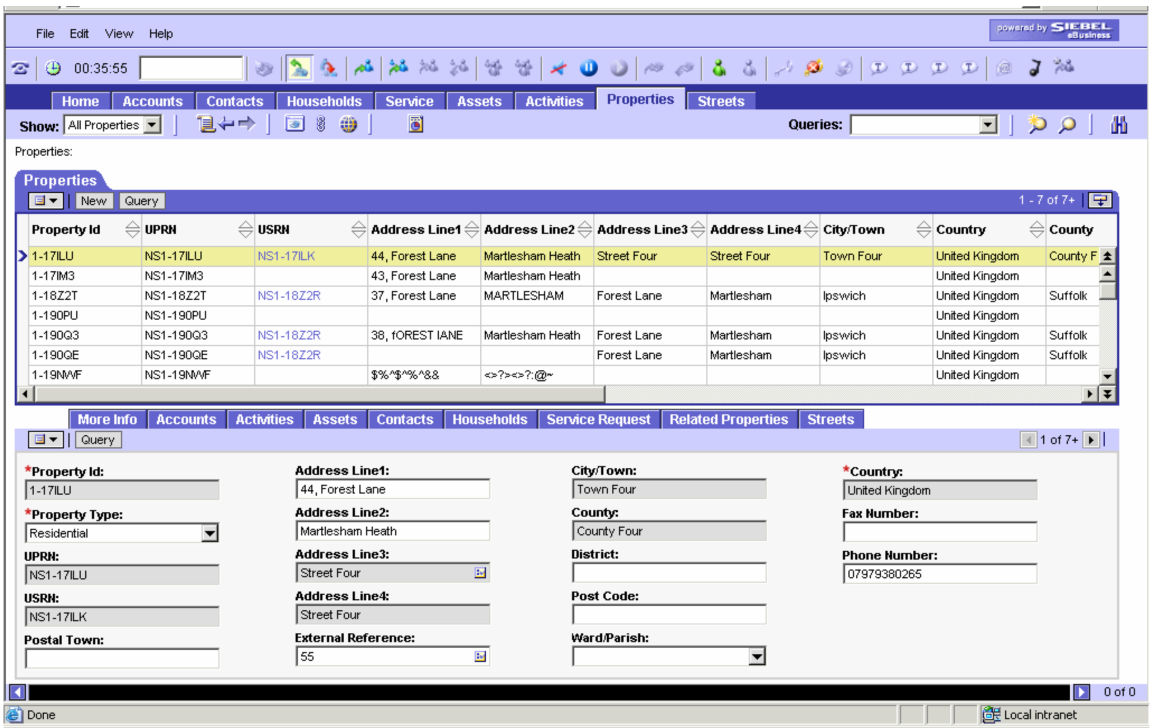
Knowledge base / Search / Keyword Search

A pre-built knowledge base containing important information that can be augmented by local information, can be quickly accessed by Contact Central +LG's powerful search engine. Using the +LG search facility, which is case sensitive, agents can locate information relevant to the current enquiry. Agents can also use the Keyword Search, which is case insensitive.

Search and Keyword Search are particularly useful if the agent handling a call isn't sure about which department will deal with the enquiry.

Properties

Properties are business or residential buildings that the Local Council owns or for which they are administratively responsible.
The Properties screen displays information about Properties owned or under the control of the Local Council. The Properties screen and its



…related views can be used to work with the following:

- Accounts
- Activities
- Assets
- Contacts
- Service Requests
- Special Collections
- Waste Rounds
- Streets

Properties are directly related to Streets.

SmartScripts

Smart Scripts are a pre-programmed sequence of questions to capture key pieces of information to qualify the caller's request, for example, whether they are eligible for a particular Housing grant and what type of follow up activity is required. The scripts are easily accessed by clicking a Smart Scripts button, and are specific to the process used. For example, initial questions might be to find out if the caller lives within the Council boundaries, how old they are, what their income is, and so on, until at the end of the script the caller can be qualified.

Service Requests

Service Requests are specific to council departments and log customer details of the request and generate a list of activities or workflows. The provision of a comprehensive list of Service Request types can satisfy a high diversity of enquires.

Workflow is initiated automatically based on the information collected by the smart script and the subsequent activity plan that is generated. Back Office or other specialist staff are tasked to carry out the work.

A typical service request process is described below:

- Receive Incoming Call. A citizen calls to enquire about a product or service or to report a problem with it.
- Receive and Open Request. The agent opens a service request, enters or verifies customer and product information, and records a description of the problem.
- Verify Service Level and Enter Details. The agent checks to see if the customer has a service agreement for the level of service needed to resolve the problem. The agent verifies that the agreement has not expired, and the person on the phone is an approved contact. If the customer does not have the appropriate level of service, the agent cancels the service request and routes the call to the appropriate department.
- Assign the Request. When an agent is unable to resolve the problem over the phone, that agent can route the service request to other agents who have more expertise, or refer it to Back Office staff.

Activities

Activities are each step that needs to be completed to complete a Service Request.

The materialization of the work and services offered by Copeland Borough Council will be done through the usage and management of Activities in Contact Central. At each step of the process, an Actiivity with :

- A degree of importance and urgency
- A due date
- An owner

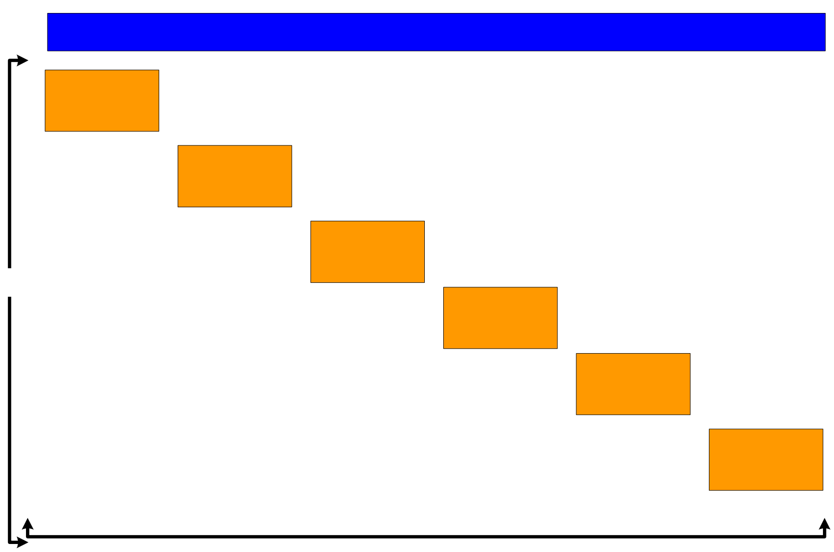
… will be defined.

Activities will be the sole official reference that will testify for what has been done. The consequence for the user community is that the regular update of the Activities assigned to you now will represent an important part of your responsibilities.

Detailed explanations of Activities and how to use them will be given in further sections of this manual.

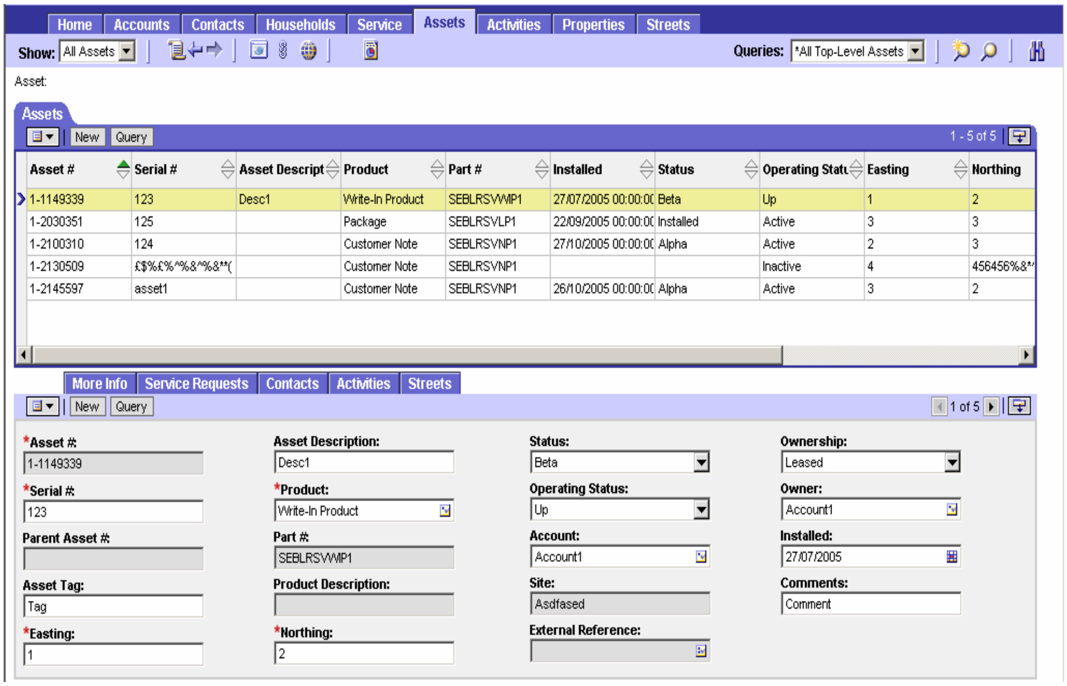
Activity Plans

The integration of pre-built activity plans and workflow to ensure all departments and key back office systems are notified of the tasks that need to be followed to respond to the enquiries. Workflow is initiated automatically and based on the information collected by the smart script and the subsequent activity plan generated. Back Office or other specialist staff are tasked to carry out the work.



Assets / Products

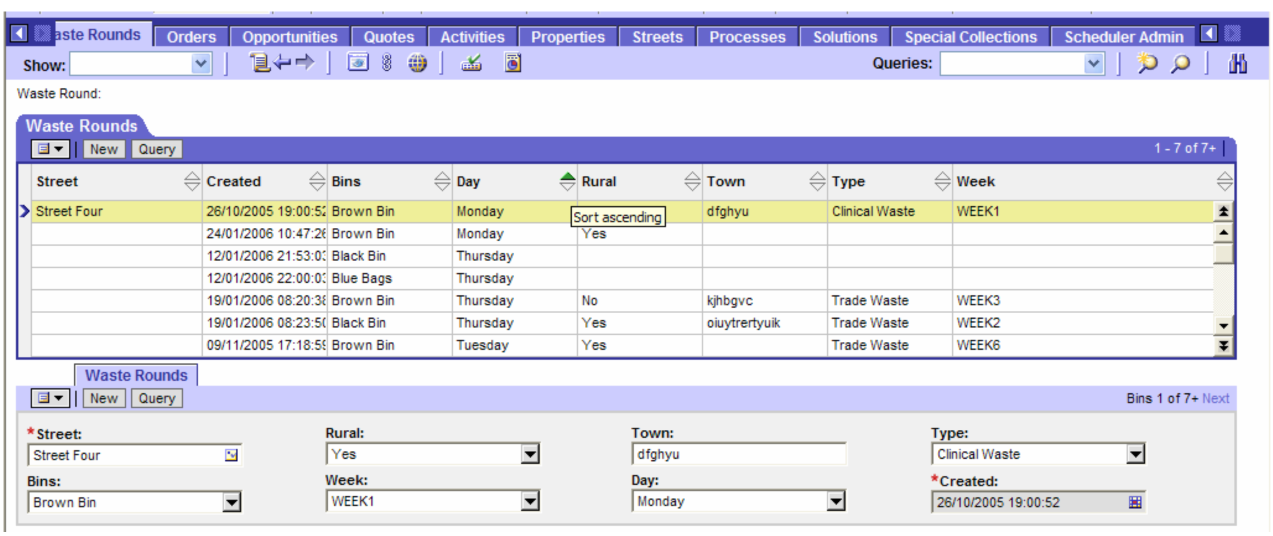
Assets are items for which the Local Council is responsible, for example, parks, traffic lights, bus shelters, wheel chairs etc.



Waste Rounds

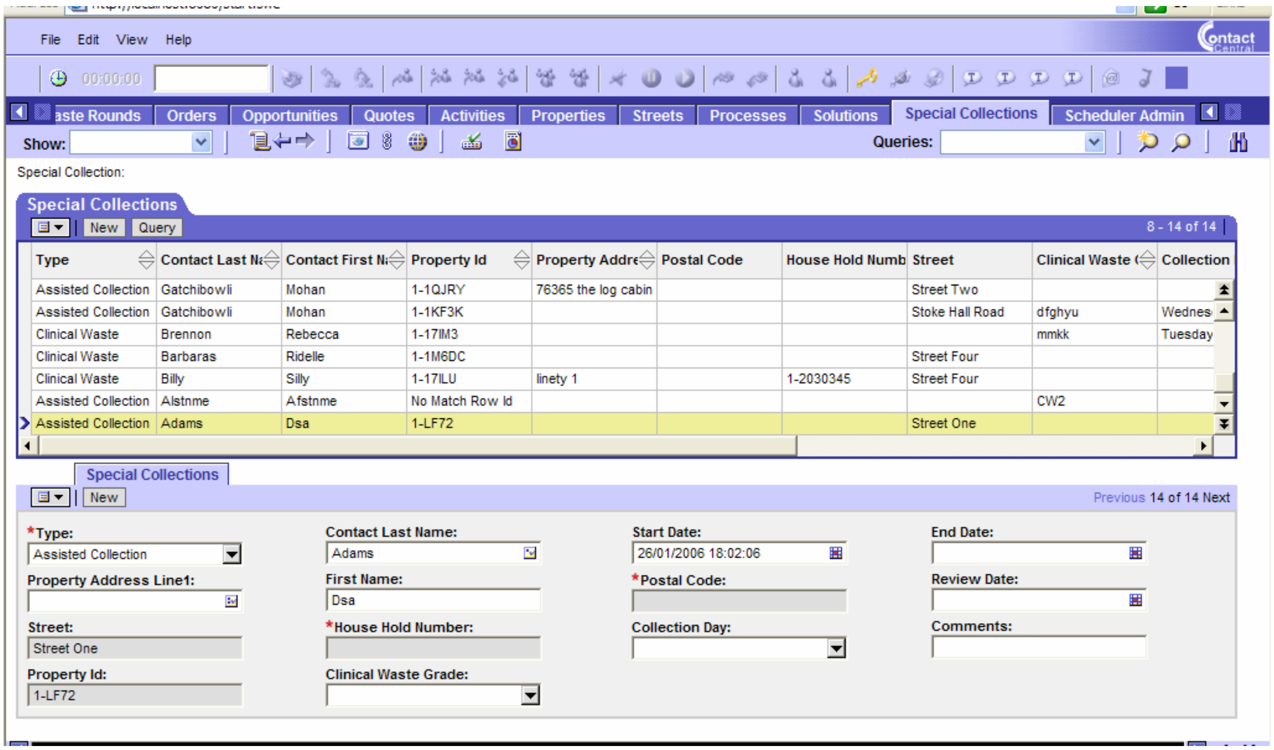
Waste Rounds are a new, Copeland specific entity. This particular Siebel tab contains the list of the waste rounds carried by the Council with a day and estimated time within the week.

Waster Rounds are the reference used when an appointment is made to check whether or not enough resources are available for the appointment to be made at that particular time.



Special Collections

Special Collections are another new entity specifically designed for Copeland Borough Council. This tab collates all appointments made for the collection of clinical waste and large / bulky items.



Get Collections Excel file generation

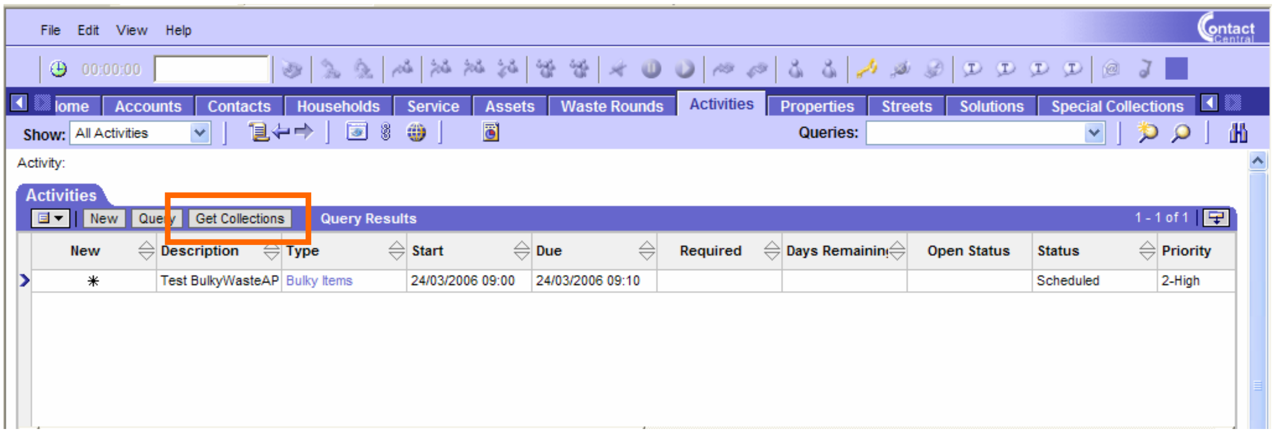
Visible under the **ACTIVITIES** tab, the **Get Collections** button allows you to generate an Excel file that contains the details of a particular set of records preselected using a Query.

MAKE SURE THAT YOU QUERY FOR A RECORD SUBSET BEFOR USING THE WASTE COLLECTION BUTTON. NOT DOING SO WILL EXPORT EVERY CONTACT CENTRAL ACTIVITY INTO THE EXCEL FILE

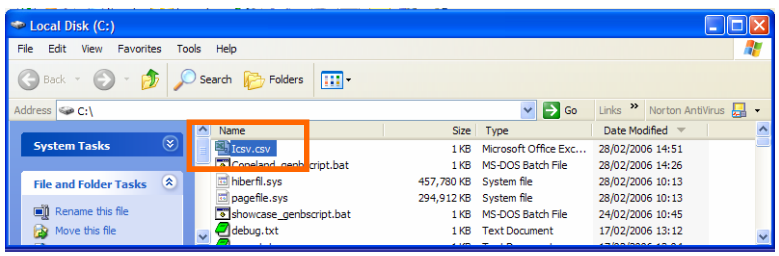
We will use an example and try to obtain the list of collections scheduled from tomorrow onwards for the vehicle assigned to South Copeland

- Navigate to the **ACTIVITIES / All Activities** view
- Perform a Query to obtain the appropriate data subset. Using the example above:
  - **Type** Bulky Items
  - **START** field >=TODAY()+1
  - **Owner** STHBULK

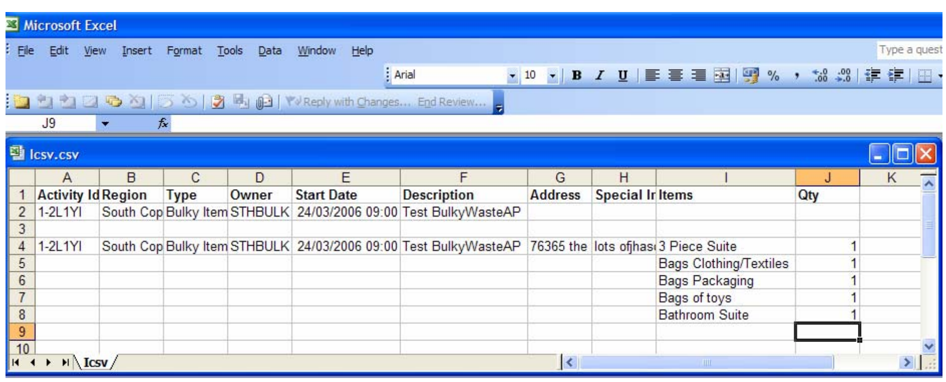
The Query result looks like this:



- Click on the **Get Collections** button
- On the Desktop, open you're my Computer icon and browse to c:/
- Check the file: **Icsv.csv**



- Open the file in Microsoft Excel to see the detail of the collections with quantities and address:



Searching for information in Contact Central

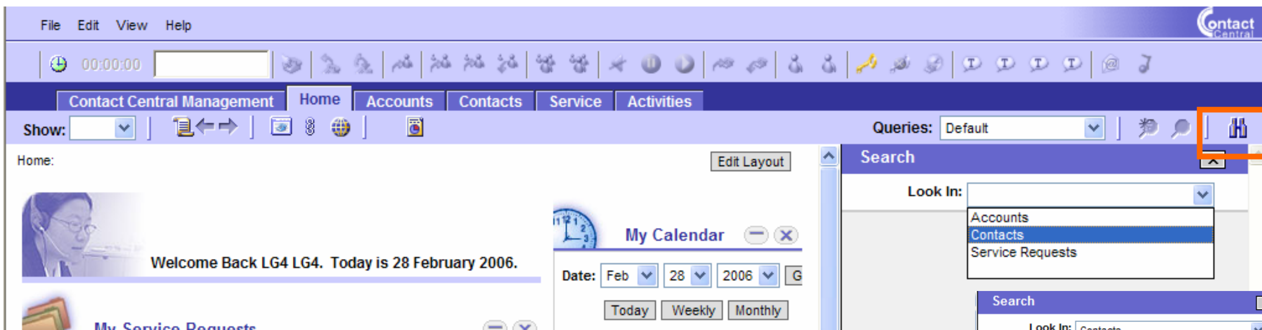
Introduction

The wealth of information available in Contact Central makes it necessary for the tool to provide powerful search functionalities. Contact Central offers several searching tools to users:

- Searches
- Predefined queries
- Custom queries

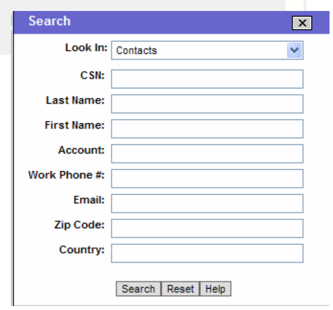
Searches

The search tool of Contact Central can be obtained by clicking on the binoculars located on the top right of the screen:

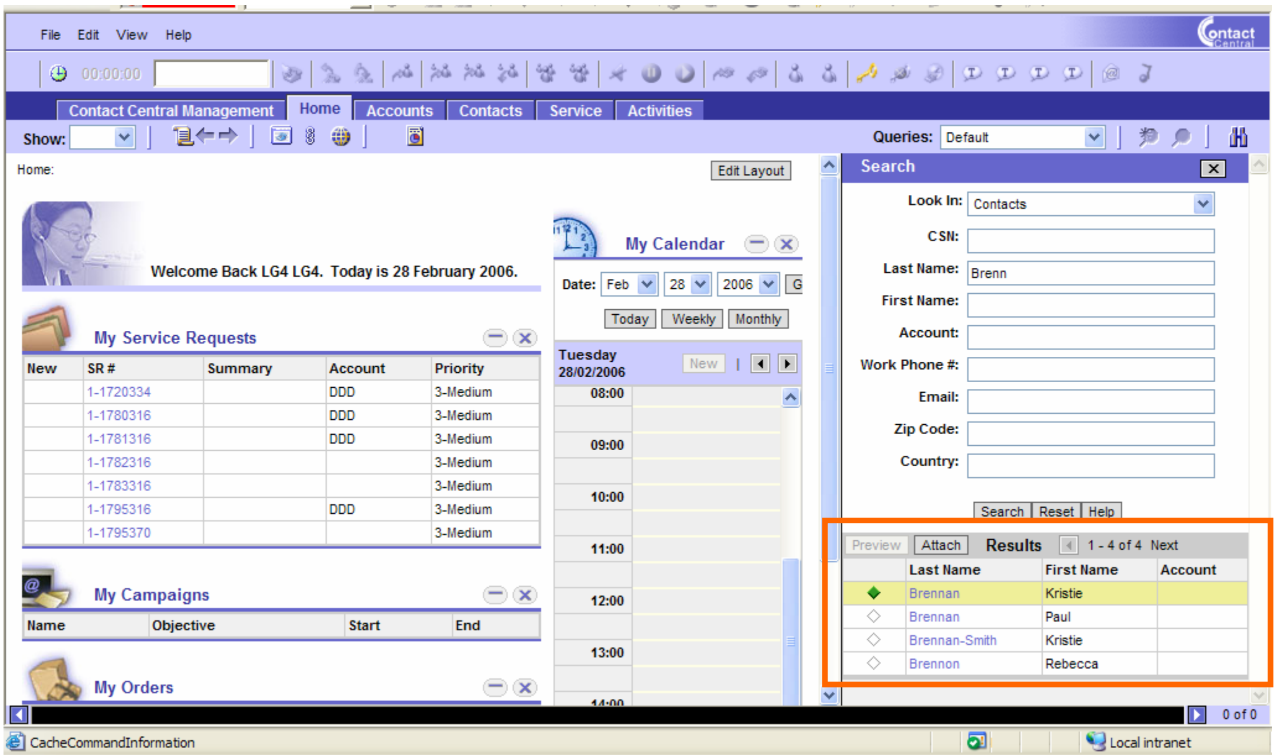


This button allows you to search in the main Contact Central entities:

- Click on the Contact Central search binoculars
- Select the Entity you want to search into:
- When the entity is selected, its related fields are displayed (example with Contacts here)
- Fill in the search criteria
- Click on the **Search** button



Contact Central will process the search by adding wild characters before and after the strings of characters entered. The results appear in the window below the search window:



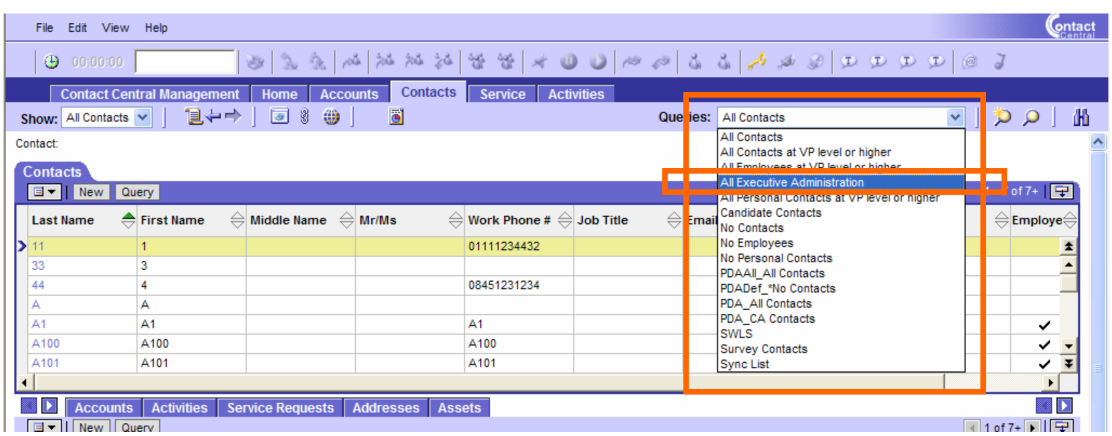
- Click on the name hyperlink of one of the results. Contact Central will navigate to he relevant record

This search mechanism is the most direct, and the one that Agents will use most frequently (esp. for Solutions), because they make it possible to “jump” to the information no matter the entity in which a user is navigating.

Predefined Queries

Queries differ from Searches in the fact that they permit more complex requests. For example, you could find all the Acvtivities with a status of **In Progress** or **Open** with a Query, but not with a search.

- Navigate to the appropriate view
- Open the **Queries** predefined Queries picklist



- Select the Query you wish to use
- Press the **Enter** key to return the results

Custom Queries

You can also build and save your own Queries in Contact Central, in any view.to do so, use the magnifying glass on the top right of the screen:

Creating a Query

To create a Query:

- Navigate to the view where the Query is to be executed
- Click on the lef magnifying glass with the star 
- Enter your search criteria
- Click on the right magnifying glass  to exexcute the Query

Note Please refer to the Help section of Contact Central on Queries to have more details and examples of Queries

Refining a Query

Once a Query has been created, you may want to update or modifying,. The **Refine** option of Contact Central will allow you to edit the Queries made and to modify them. The **Query** button, generally located on the top left of applets, will allow you to do so:

- Create a Query or run a predefined Query
- Right-click on the **Query** button
- Select the **Refine Query** command
- Modify / add / remove querying criteria
- Click on the right magnifying glass  to exexcute the Query

Note Use this method in a sequential and incremental manner to build complex queries, with a trial and error approach

Saving Refining a Query

- Queries can be saved easily, and reused in a further session: They are user-specific, but can be shared if a Contact Central Administrator enables them for the rest of the user base.
- Create a Query or run a predefined Query
- Right-click on the **Query** button
- Select the **Save Query As** command
- Enter the Quert name in the list
- Click on the **OK** button

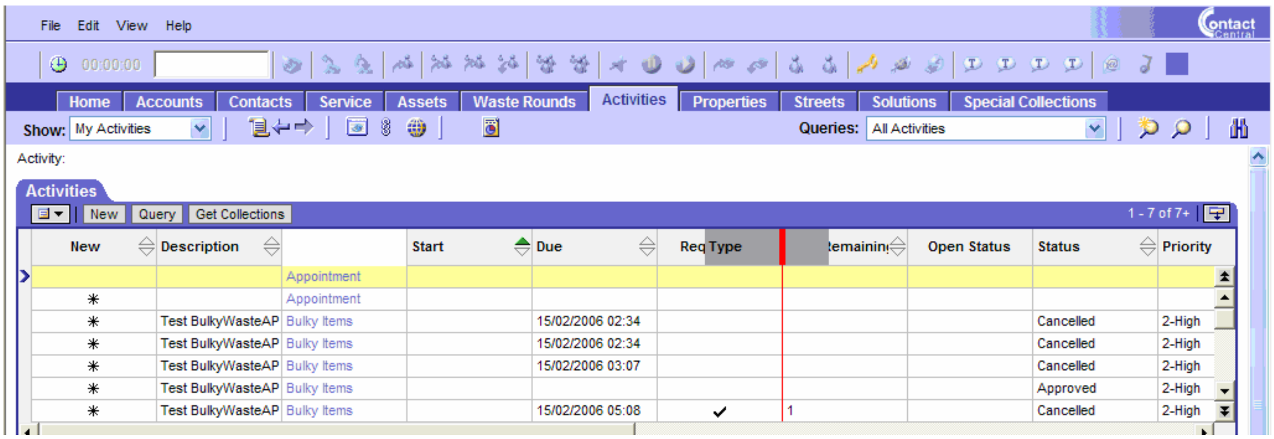
IMPORTANT The Query will not be saved if you press the **Enter** key instead of the **OK** button

Handling phone enquiries - Agent

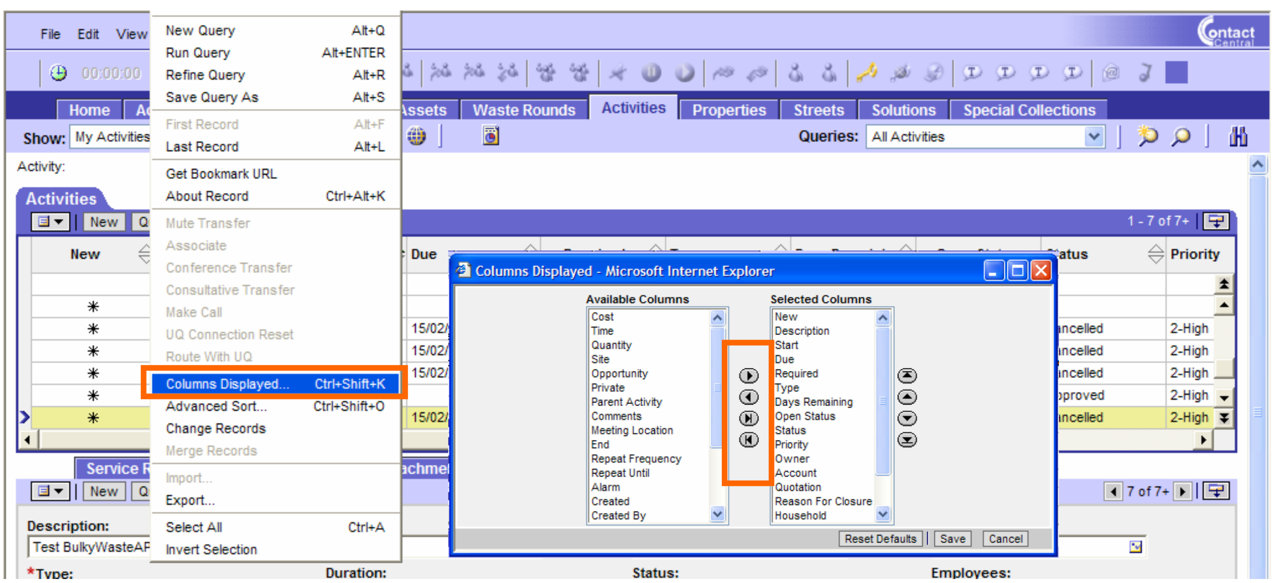
Adjust your environment

Contact Central makes it possible for you to djust the order and the display of the columns for any of the views.

- To change the order of the columns, left-click on a column, then drag-and-drop it to its new position. In the image below, the **Type** field is moved to the right, between the **Required** and **Days Remaining** fields



- The width of the columns can be changed, by left-clicking between fields to the right of the field whose width you wish to change, then dragging-dropping the width (like in MS Excel)
- To hide fields:
  - Right-click in the list applet
  - Select the **Columns Displayed** option

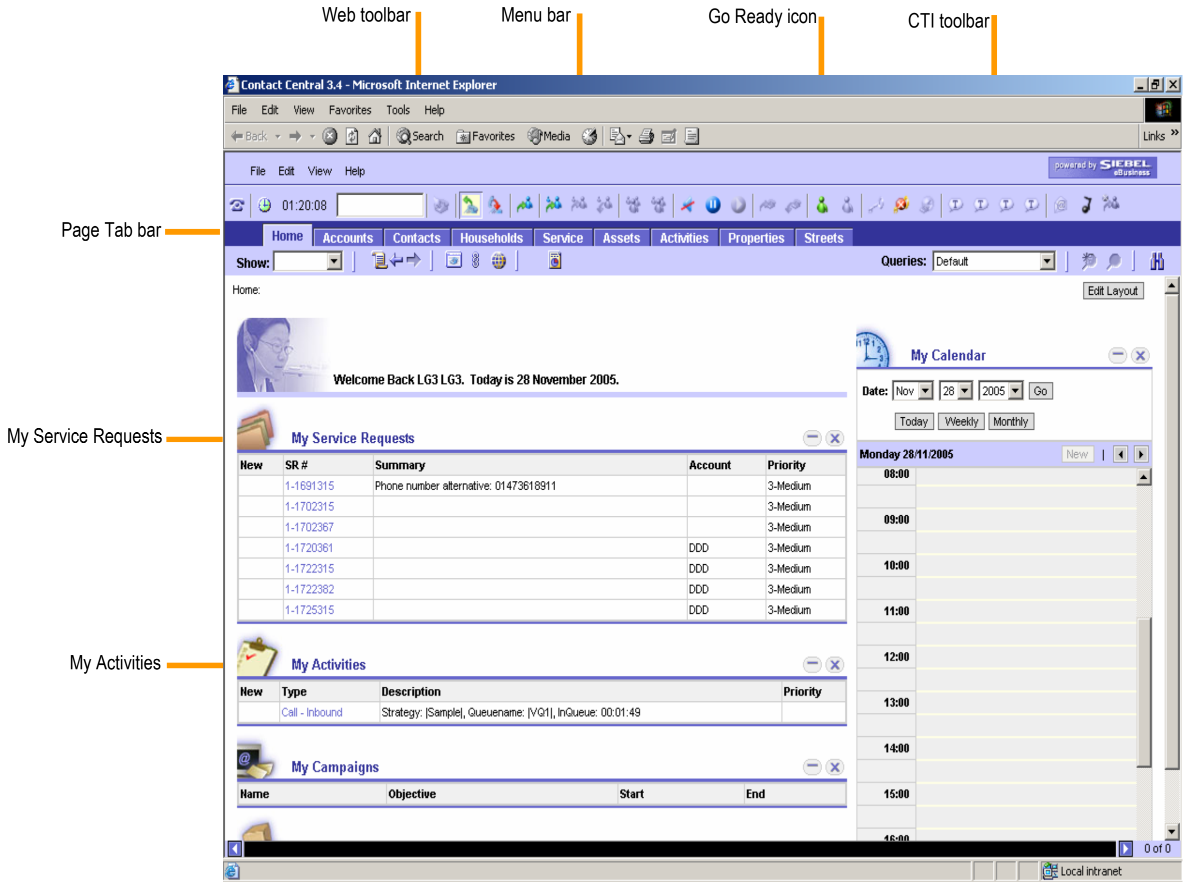


  - Use the arrow to hide the fields (by placing them in the **Available Columns** column) or in the **Selected Columns** column
  - Click on the **OK** button

Handling phone enquiries - Agent 3

Logon and home page

Agents must log on by clicking on the Contact Central icon on their desktop. After logging on, the agent **Home** page is displayed showing current SRs that need action in **My Service Requests**, and a list of tasks to carry out, shown in **My Activities**. Toggle the Go Ready icon to handle calls.



Contact Central is a web-based application and uses a Microsoft Internet Explorer tool bar. The other toolbars are:

- Menu bar is used to access the Contact Central features.
- The CTI tool bar allows login/logout, all call handling, E-mail and fax, Chat and Callback requests
- The Page tab toolbar allows you to rapidly access the most commonly used Contact Central functions.

Agent states

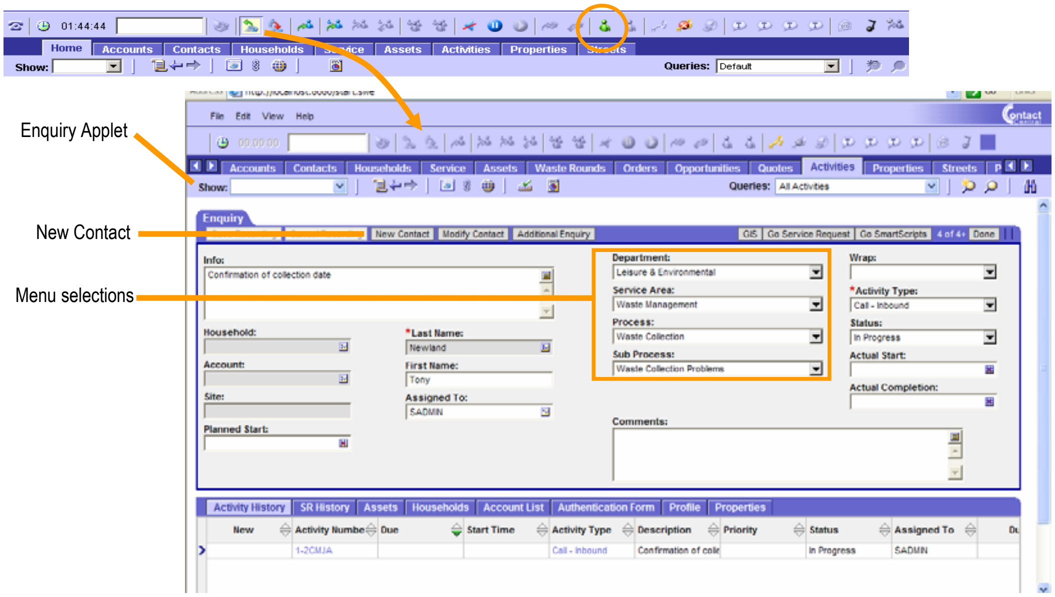
The colour of the agent icons represents the agent's status: red is logged out, green is logged in and ready, blue is logged in and busy, and yellow shows a logged in but not ready state.

When an agent is busy, a symbol on the blue icon represents the type of customer contact: the phone symbol represents a voice call, **e** stands for E-mail, **T** is a text contact, and **F** is fax. If the agent handles two sorts of contact, the first that they pick up is the one represented.

Call handling

General

When the agent is in the ready state, after clicking the **Go Ready** icon, clicking the inbound call icon activates the **Enquiry** applet.



Menu selections

The most important drop-down menu selections on the **Enquiry** applet correspond to the structure of local government departments. These selections form the basis of the Service Request. In response to a customer contact, the agent selects from the block of four drop-down menus on the Enquiry applet, starting with Department. Each department has many Service Areas, which in turn have selections for Process and Sub-process. The Contact Central solution for Copeland has been simplified in this area, and some pick-lists have already been assigned:

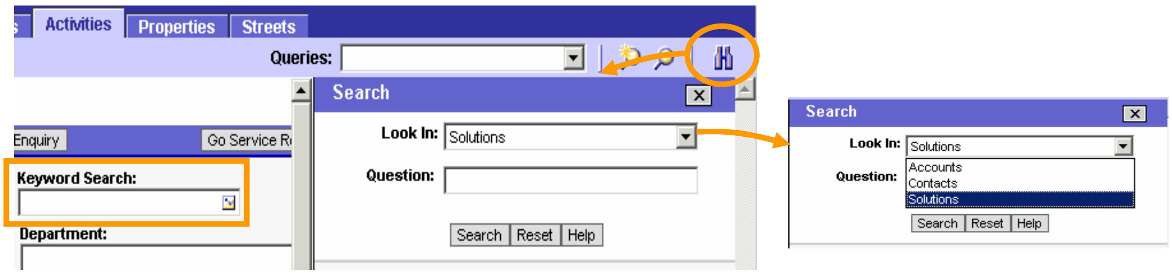
- **Department** Leisure & Environmental
- **Service Area** Waste Management
- **Process** Refuse Collection, Street Cleansing , Trade Waste , Waste Collection
- **Sub-Process** The values that are offered will depend on the process chosen. You can see the following values:

SUB-PROCESS VALUES	
Refuse Collection: - Assisted Collection - Excess Waste - New Bin Request	**Street Cleansing:** - Environmental Cleansing - Fly Tipping
Trade Waste: - Trade waste	**Waste Collection:** - Bulky Waste Collection - Cancel or Amend Bulky Waste Collection - Chargeable Bulky Waste - Chargeable Bulky Waste Quotation - Clinical Waste Collection - Recycling Banks - Waste Collection Problems

-

Search / Keyword Search

If the agent is unclear about how the caller's request should be assigned, they should click the binocular (Search) icon. In the **Look In** field drop-down menu, select **Solutions** search function and enter a key word bracketed by asterisks. This field is case sensitive. Alternatively, enter a key word in the **Keyword Search** field. This area is case insensitive and bracketed asterisks are not required.



Accounts and **Contacts** are also selectable from the **Look In** field drop-down menu.

Recommended usage for the Solution search

After the initial adjustment period, you will become familiar with the most frequent searches. To help you at the beginning, we recommend that you follow some simple rules when performing a search in order to obtain the quickest and most appropriate results:

- Always search using **lower case**
- Use the star ("*") between characters. For example, enter ***bulky*item***. This will return the Solution even if there is another word between "**bulky**" and "**item**"

Favourite Solutions

The most frequently used Solutions can be queried for by using the query for favourites:

- Use the star ("*") between characters. Search for ***fav***. This will return the moste frequently used Solutions

GIS interface (phase 1)

GIS is the reference tool used to locate existing street furniture, as well as to indicate the large items This drop-down menu displays list of selectable wrap codes for when the agent has finished dealing with the caller.

Wrap

This drop-down menu displays a list of selectable wrap codes for when the agent has finished dealing with the caller.

Activity Type

This drop-down menu displays a list of selectable contact types, for example, inbound call, outbound call, E-mail etc.

Status

This drop-down menu displays a list of status levels:

- In Progress
- Hold
- Escalated – one or more of 3 SLA's breached
- Breached – SLA exceeded