



SURGERY CONNECT

Resource Management Webinar

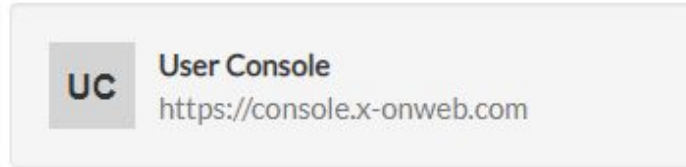
Presented by James Delves

Session Agenda

- Identifying Issues
- Group Management
- Auto Step In
- Introduction to Reports

Identifying Issues

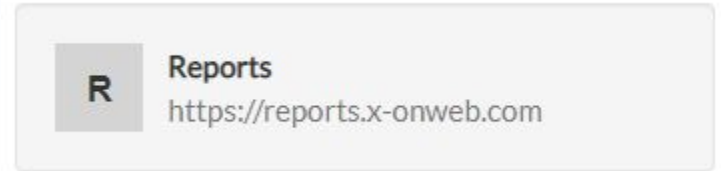
Real time analysis



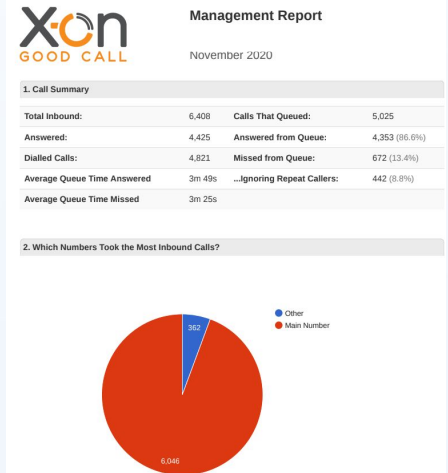
- Queued (red) calls
- User status changing

AP 210 Astrid Peth		BW 203 Barbara Wri...	
BJ 217 Ben Jackson	DN 200 Donna Noble	JH 206 Jack Harkness	JG 220 Jo Grant
LS 202 Liz Shaw	MJ 215 Martha Jones	RW 214 Rory Williams	TJ 236 Tegan Jovan...
YK 212 Yasmin Khan			

Reports



- Reports Console via SSO
- Monthly email



Group Management

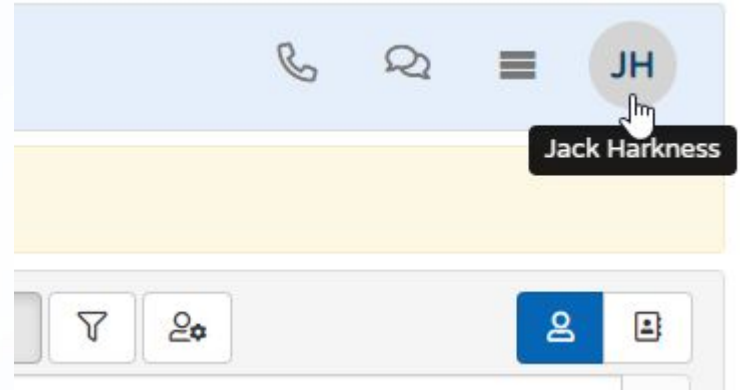
Different Permission levels

- **Standard User** - restricted User Console view, Supervisor needs to step in or out of groups, no access to call recordings
- **Standard User with Group Management** - full User Console, can step in and out of groups, access to own call recordings (replay)
- **Supervisor** - full User Console, can step in and out of groups, access to all practice call recordings (replay, download or delete)

User permission levels can be changed through the User option in the Service Delivery Console
(or via Support for Configuration Console)

Group Management

Once permissions are granted,
Group Management can be accessed through the
User Console



Jack Harkness 206

Numbers	User status	Group management
Work: 01449 100112	Available	Appointments
Mobile: 07749 100912	Do Not Disturb	Physiotherapy ✓
Temp: Soft phone	Logged Out	
	Outbound Calls	

Close

Community Services and Occupational Therapy 310

Auto Step In

Parameters can be set to automatically add people to groups

Accessed through the Configuration Console

X-on Training Account

- Services
- Users
- Extensions
- Groups**
- Calendars
- Directory
- Integrations
- X-Flow
- Global settings

CC Configuration Console
<https://config.x-onweb.com>

Groups list + New group

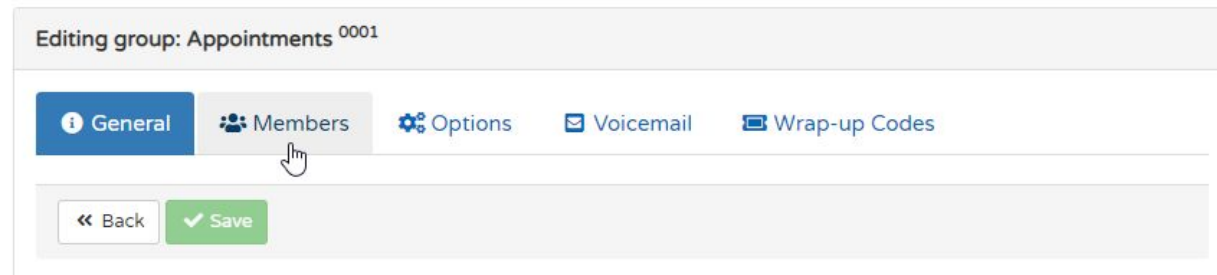
Name search Q Search

Legend: Shared Queue Group | Part of a Shared Queue Group

Admin Staff 0016	Appointments 0001	Community Services and Occ... 0012

Auto Step In

Select Members tab



Auto Step In Members

When the **Queue Length** or **Queue Wait** levels you set are reached the user will automatically become active in the group and calls will be distributed to them.

A value of 0 will ignore that setting for the user.

When queue levels reduce below the settings the users will be automatically stepped out of the group.

User ID	Name	Member	Active	Queue Length before Step In	Queue Wait before Step In (seconds)	Auto Step In
0067	Clara Oswald	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="text" value="10"/>	<input type="text" value="120"/>	<input checked="" type="checkbox"/>

Members

User ID	Name	Current Number	Member	Active	Priority	Auto Step In
0080	Adam Mitchell	softphone	<input checked="" type="checkbox"/>	<input type="checkbox"/>	none	<input checked="" type="checkbox"/>
0029	Amy Pond	07927 717927	<input checked="" type="checkbox"/>	<input type="checkbox"/>	none	<input checked="" type="checkbox"/>
0074	Astrid Peth	softphone	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	none	<input checked="" type="checkbox"/>

Select Users to be stepped in

Auto Step In

[General](#)
[Members](#)
[Options](#)
[Voicemail](#)
[Wrap-up Codes](#)

[« Back](#)
 [Save](#)

Auto Step In Members

When the **Queue Length** or **Queue Wait** levels you set are reached the user will automatically become active in the group and calls will be distributed to them.

A value of 0 will ignore that setting for the user.

When queue levels reduce below the settings the users will be automatically stepped out of the group.

User ID	Name	Member	Active	Queue Length before Step In	Queue Wait before Step In (seconds)	Auto Step In
0067	Clara Oswald	<input checked="" type="checkbox"/>		<input type="text" value="10"/>	<input type="text" value="120"/>	
0083	Ian Chesterton	<input checked="" type="checkbox"/>		<input type="text" value="0"/>	<input type="text" value="0"/>	

Members

User ID	Name	Current Number	Member	Active	Priority	Auto Step In
0080	Adam Mitchell	softphone	<input checked="" type="checkbox"/>	<input type="checkbox" value="No"/>	none ▾	

Set the parameters for each User

Reporting Introduction

Suite of reports available from the Reports Console



Management Report

X-on Demo Surgery
August 2018

1. Call Summary

Total Inbound:	13,850	Calls That Queued:	9,086
Answered by a Person:	9,559	Answered from Queue:	7,944 (87.4%)
Dialled Calls:	6,189	Missed from Queue:	1,142 (12.6%)
		...Ignoring Repeat Callers:	780 (8.6%)

Terminology

- **Answered** - Call targeted staff and was answered
- **Abandoned** - Caller ended the call before joining a queue or targeting a user
- **Missed** - Call joined a queue or targeted a user but was not answered.

Reporting Introduction

- Reports can be run at any time
- Click the star to add to Favourites

SURGERY CONNECT

Favourites ▲

Call Reports ▼

- ☆ Inbound Call Performa... [Bar Chart] [Table]
- ☆ Inbound Call Stats [Bar Chart] [Table]
- ☆ Inbound Number Over... [Bar Chart] [Table]
- ☆ Menu Selection Report [Table]

Group Reports ▼

- ☆ Group Overview [Bar Chart] [Table]
- ☆ Group Overview Hourly [Bar Chart] [Table]
- ☆ Queue Busting Report [Table]
- ☆ Queue Duration Analysis [Bar Chart] [Table]

User Reports ▼

- ☆ User Calls Overview [Table]
- ☆ User State Timeline [Bar Chart]
- ☆ User Status Overview [Table]

Management Reports ▼

- ☆ Monthly Management ... [Bar Chart] [Table]

Other ▲

SURGERY CONNECT

Favourites ▼

- ★ User State Timeline [Bar Chart]
- ★ Inbound Call Performa... [Bar Chart] [Table]

Call Reports ▼

- ★ Inbound Call Performa... [Bar Chart] [Table]
- ☆ Inbound Call Stats [Bar Chart] [Table]

Reporting Introduction

Example Group Overview Report

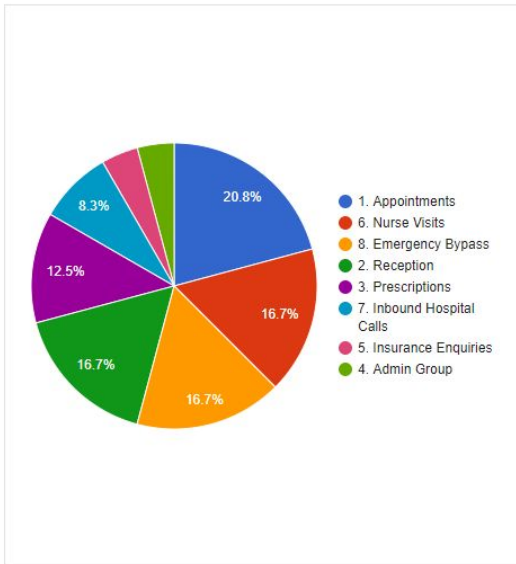
Group Overview



17/02/2021 - 23/02/2021

Generate Report

Export ▾



Show All entries

Search:

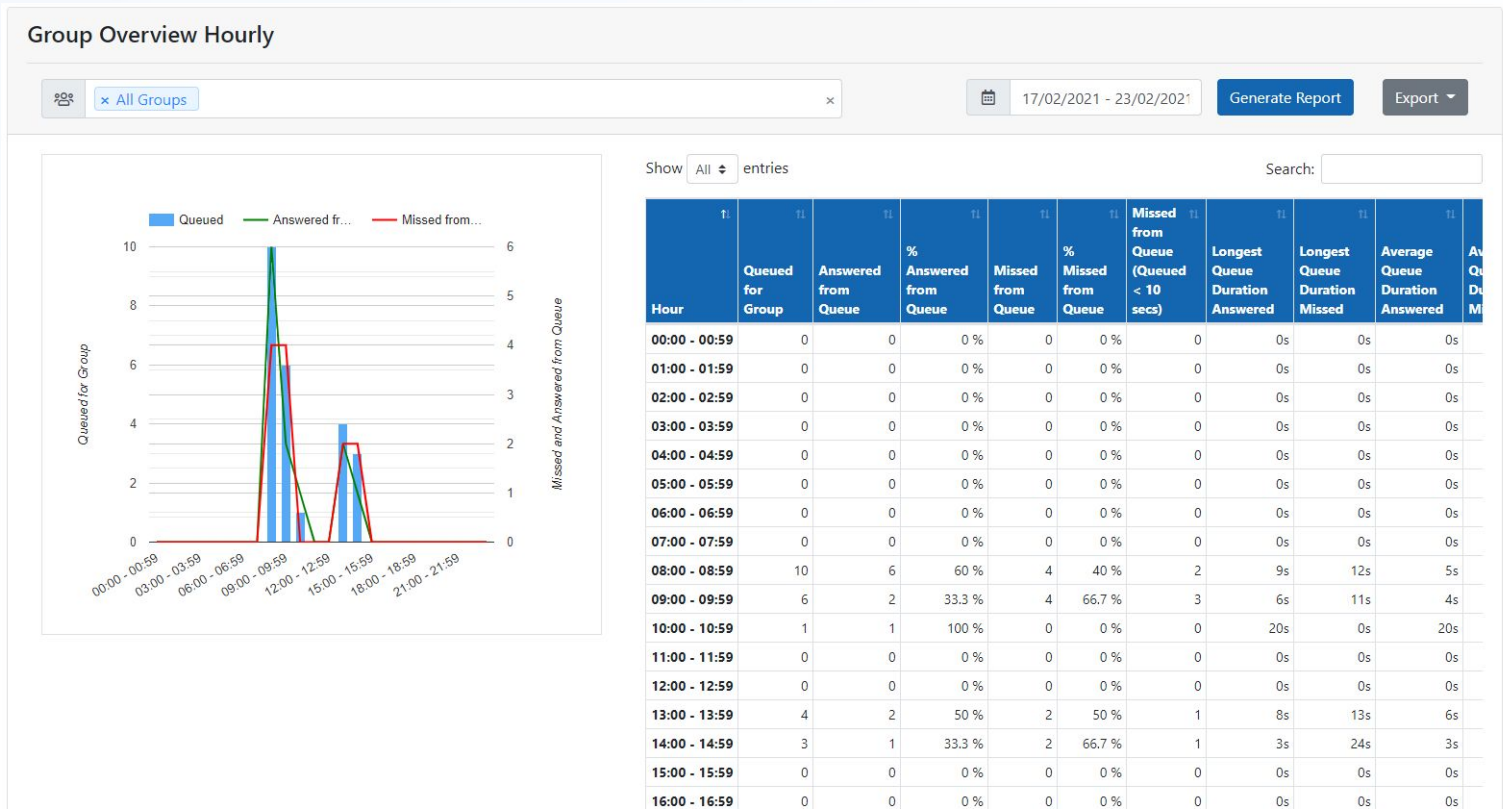
Group	Queued for Group	Answered from Queue	% Answered from Queue	Missed from Queue	% Missed from Queue	Missed from Queue (Queued < 10 secs)	Longest Queue Duration Answered	Longest Queue Duration Missed	Average Queue Duration Answered	Average Queue Duration Missed
1. Appointments	5	5	100 %	0	0 %	0	20s	0s	10s	0s
2. Reception	4	0	0 %	4	100 %	2	0s	11s	0s	10s
3. Prescriptions	3	1	33.3 %	2	66.7 %	2	9s	10s	9s	9s
4. Admin Group	1	0	0 %	1	100 %	1	0s	9s	0s	9s
5. Insurance Enquiries	1	0	0 %	1	100 %	0	0s	24s	0s	24s
6. Nurse Visits	4	4	100 %	0	0 %	0	3s	0s	2s	0s
7. Inbound Hospital Calls	2	2	100 %	0	0 %	0	3s	0s	3s	0s
8. Emergency Bypass	4	0	0 %	4	100 %	2	0s	13s	0s	11s
Total:	24	12	50 %	12	50 %	7	20s	24s	6s	11s

Showing 1 to 8 of 8 entries

Previous **1** Next

Reporting Introduction

Example Group Overview Hourly Report



Summary & Questions

- Identifying Issues
- Group Management
- Auto Step In
- Introduction to Reports

Questions?