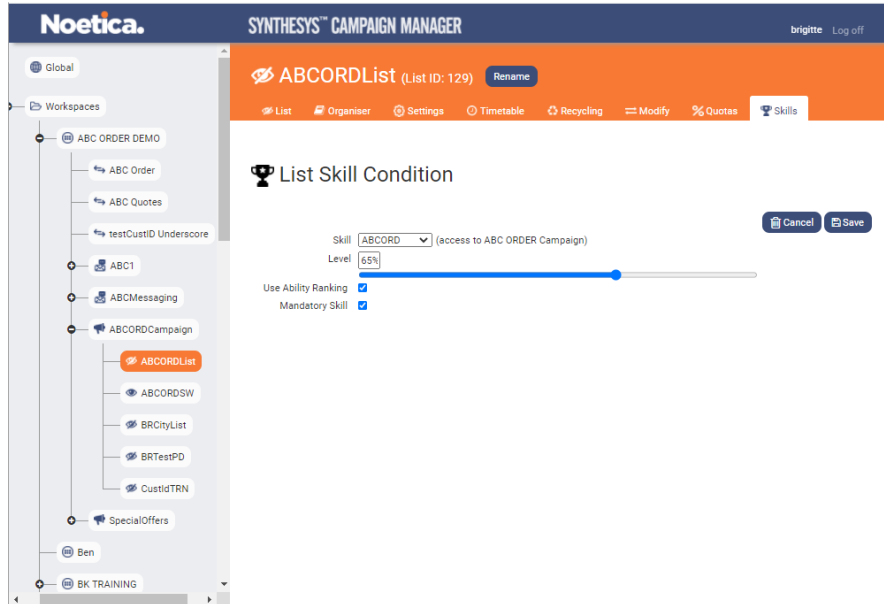


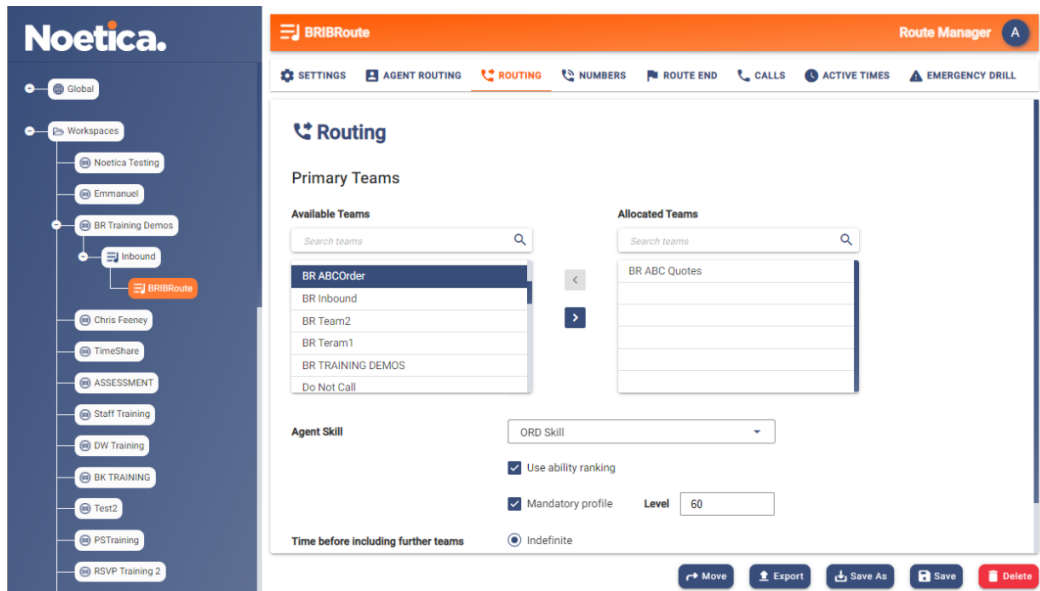
SABRE™

SKILLS & ABILITY BASED ROUTING ENGINE

Campaign Manager: SABRE™ for Outbound



Route Manager: SABRE™ for Inbound



All rights reserved

The contents of this documentation (and other documentation and training materials provided), is the property of Noetica and is strictly confidential. You may not reproduce any part of this document without the prior consent of Noetica.

We believe that the information in our documentation and training materials is reliable, and we have taken much care in its preparation. However, we cannot accept any responsibility, financial or otherwise, for any consequences (including loss of profit, or indirect, special or consequential damages) arising from the use of this material. There are no warranties that extend beyond the program specification.

You must exercise care to ensure that your use of the software is in full compliance with laws, rules and regulations of the jurisdictions with respect to which it is used.

The information contained in this document may change. We may issue revisions from time to time to advice of changes or additions. We operate a policy of constantly improving and enhancing our application software. There is a possibility, therefore, that the format of screen display and printed output shown in this documentation may differ slightly from that provided in the software. It is our policy to update this documentation whenever a major release of software takes place.

SABRE™ (Skills & Ability Based Routing Engine)

Last updated December 2021

Synthesys is a registered trademark of Noetica.

Microsoft is a registered trademark and Windows is a trademark of the Microsoft Corporation in the USA and other countries.

All other trademarks recognised.

© Copyright 2021 Noetica

Content

SKILLS & ABILITY BASED ROUTING ENGINE (SABRE™)	4
Introduction	4
NOETICA USER MANAGEMENT	5
Skills	5
Creating new user skills	5
Managing Skills	6
Details	6
Usage	6
Users	7
User details	7
Assigning user skills	8
Setting competence levels	8
SABRE™ FOR INBOUND AND OUTBOUND CALL ROUTING	9
SYNTHESYS™ CAMPAIGN MANAGER	10
Skills in Outbound Call Routing	10
Applying Skill Conditions to Campaigns and Call Lists	11
Setting skill and competence level	11
Applying ability ranking and mandatory skill	11
Applying Skill Conditions to Outbound Groups	12
Setting skill and competence level	12
Applying ability ranking and mandatory skill	12
NOETICA ROUTE MANAGER	13
Skills in Inbound Call Routing	13
Applying Skill Conditions to the Route	14
Setting skill and competence level	14
Applying ability ranking and mandatory profile	14

SKILLS & ABILITY BASED ROUTING ENGINE (SABRE™)

Introduction

SABRE™ (Skills & Ability Based Routing Engine) enables contact centre administrators and dialler managers to use the skills and competence levels of agents and to apply these to Outbound call lists and Inbound route to enhance the call routing process, ensuring that calls from Inbound and Outbound campaigns will be given to the agents best suited to handle the calls.

Noetica User Management: The Skills to be used for call routing are created and managed in the *Skills* page of the Noetica User Management and are then allocated to individual users in the *Users* page, along with an ability level for each user.

Synthesys™ Campaign Manager: In the Synthesys™ Campaign Manager, dialler managers can pick any one of the available skills and assign this to selected campaigns, call lists or outbound groups, combined with a minimum competence level required for the skill and an ability ranking and/ or mandatory skill setting.

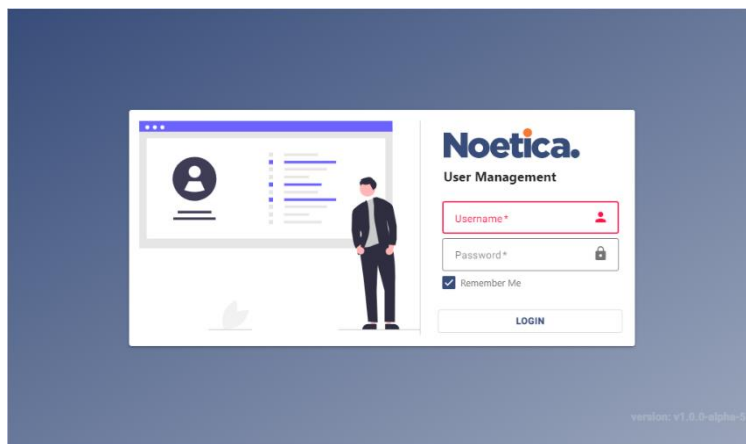
This ensures that calls can be routed to the agents most able to deal with the call, based on the skill condition set on a list and the agent's skill ability.

Noetica Route Manager: Skill routing for Inbound calling is configured in the Noetica Route Manager. A selected skill, together with a minimum competence level and an ability ranking and/ or mandatory skill can be assigned to any of the team routing levels in the Routing page of an Inbound Route.

NOETICA USER MANAGEMENT

Skills are created and managed in the *Skills* dialogue of Noetica User Management.

- Open User Management via the Noetica Admin Portal, or
- Enter the URL for the User Management into the address field of your web browser, e.g., <http://WebserverName:81/UserManagement> and add your username and password, as provided by your system administrator.



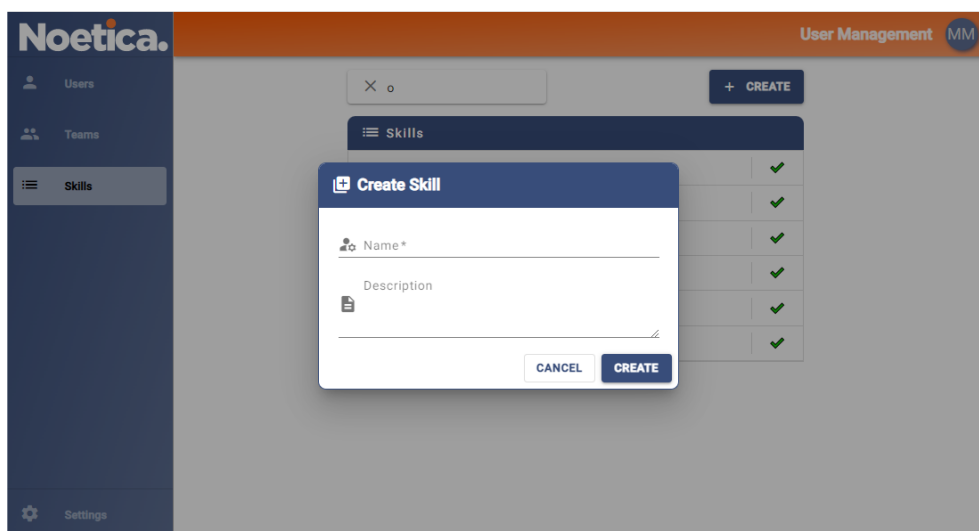
Skills

In the **Skills** page of Noetica User Management, you can create, view, update and delete user skills.

Creating new user skills

To add a new skill, select the Skills page in User Management.

- Click the **Create Skill** button at the top right of the **Skills** dialog.
- Enter a unique name for the new skill into the **Name** field.
- Add a brief comment into the **Description** field, to describe the skill.






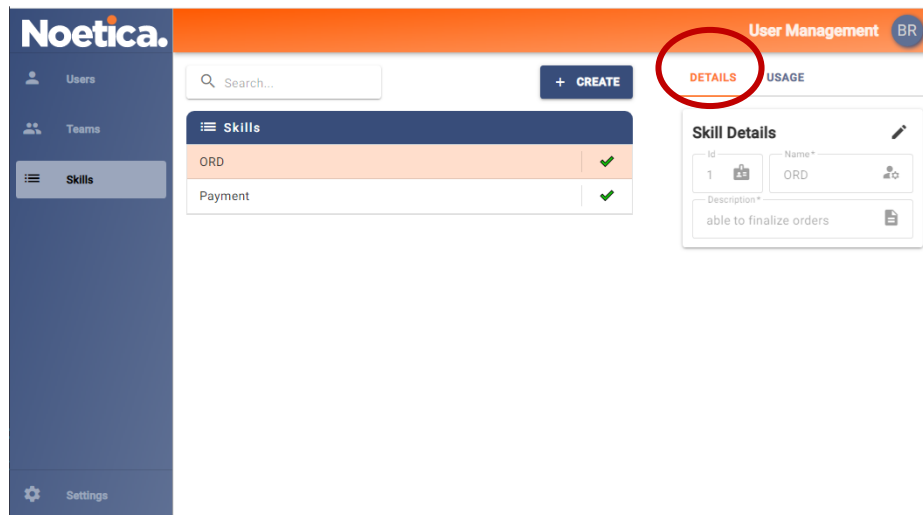
- Click the **Create** button, to create the new skill, or cancel the action.

Managing Skills

When selecting an existing skill, you can check and edit details in the **Details** section and view current skill assignments in the **Usage** section.

Details

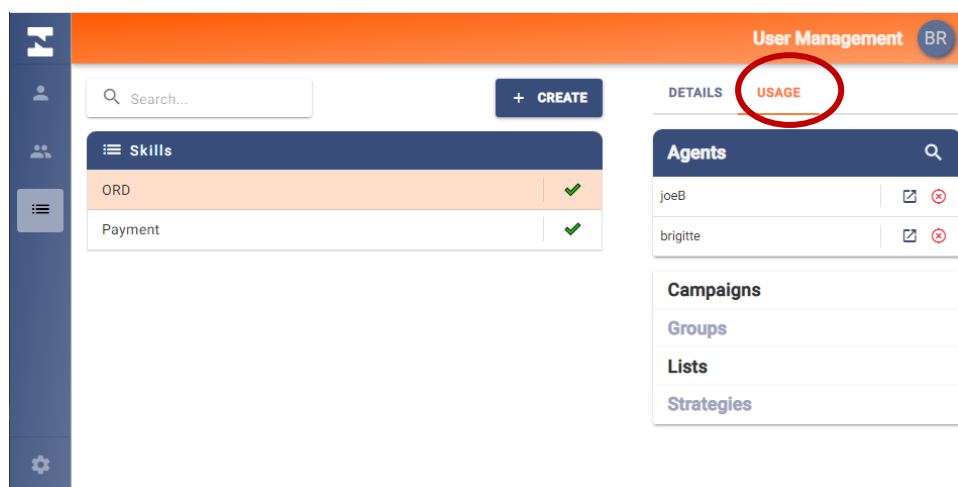
- Select the relevant skill and click the **Details** tab on the right.
- To change the skill name and description, click the  **Edit** icon, then  **Save**.
- Use the  **Delete** icon if you wish to delete a selected unassigned skill.



Usage

To show which agents, outbound campaigns, groups, call lists and inbound routing strategies are currently using a particular skill

- Select the relevant skill and click the **Usage** tab.
- Click the **Agents, Campaigns, Groups, Lists** and **Strategies** heading in turn, to view the current skill assignments.



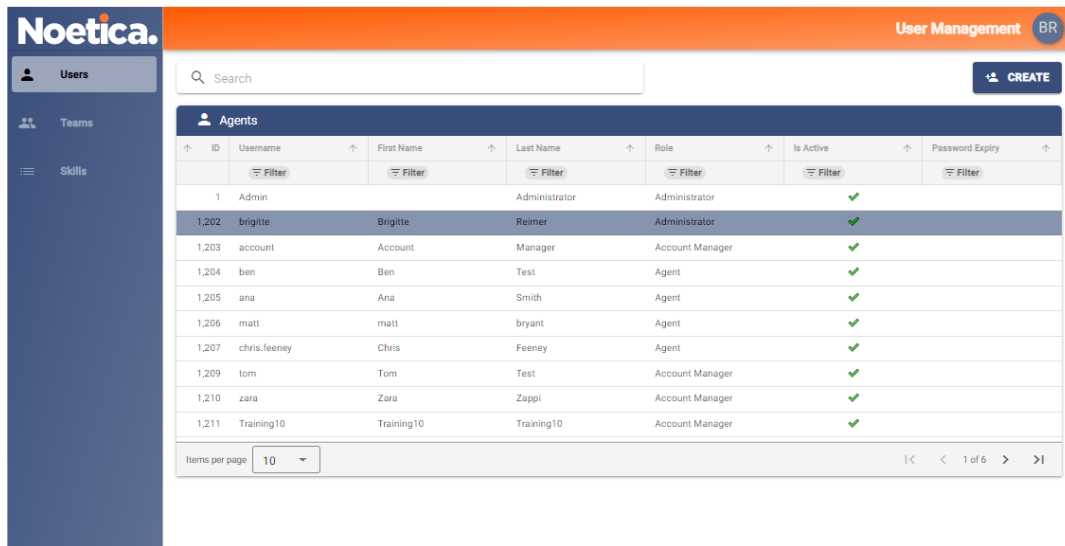
Users

The skill assignment for users is managed in the **Users** dialog of Noetica User Management.


User details

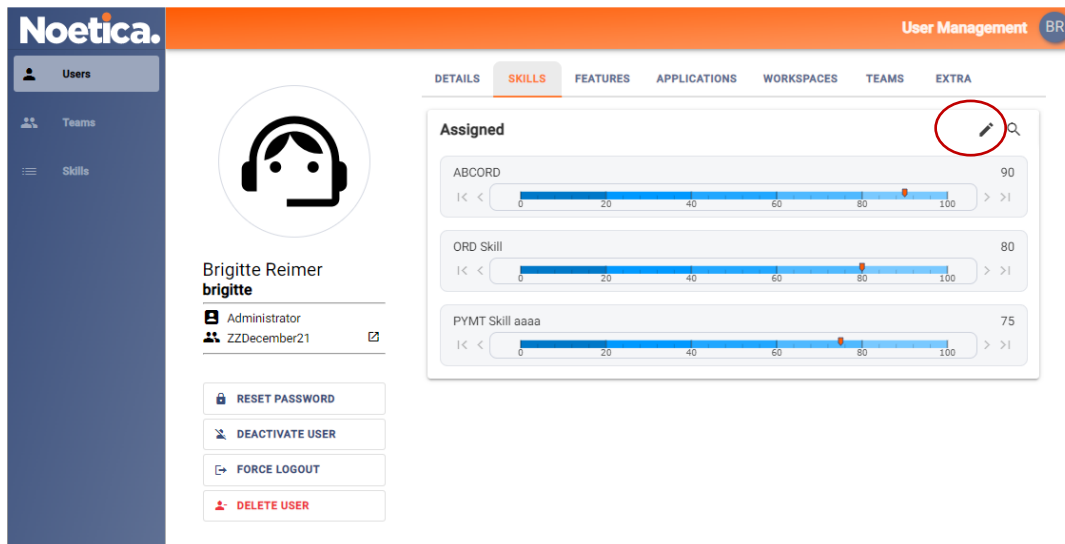
To locate a user and to view or edit skill assignment for the selected user

- Double click on the username in the **Users** dialog of Noetica User Management.



ID	Username	First Name	Last Name	Role	Is Active	Password Expiry
1	Admin		Administrator	Administrator	✓	
1,202	brigitte	Brigitte	Reimer	Administrator	✓	
1,203	account	Account	Manager	Account Manager	✓	
1,204	ben	Ben	Test	Agent	✓	
1,205	ana	Ana	Smith	Agent	✓	
1,206	matt	matt	bryant	Agent	✓	
1,207	chris.feeney	Chris	Feeney	Agent	✓	
1,209	tom	Tom	Test	Account Manager	✓	
1,210	zara	Zara	Zappi	Account Manager	✓	
1,211	Training10	Training10	Training10	Account Manager	✓	

- In the User's detail page, click the **Skills** tab, to show details of the skills assigned to the selected user.
- To update skills and competence levels assigned to the user, click the  edit icon.




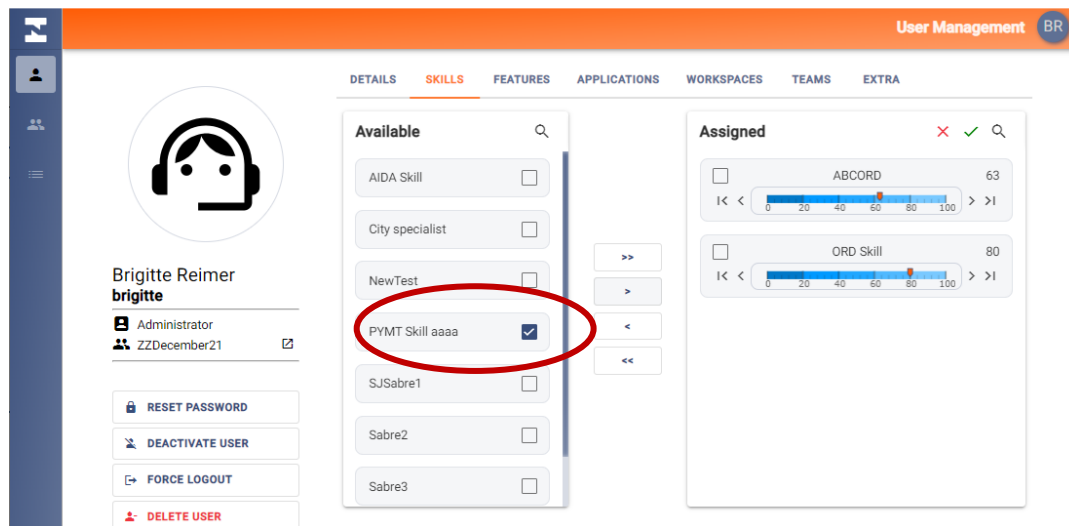
Assigned

Skill	Level
ABCORD	90
ORD Skill	80
PYMT Skill aaaa	75

Assigning user skills

To assign or remove skills for the selected user

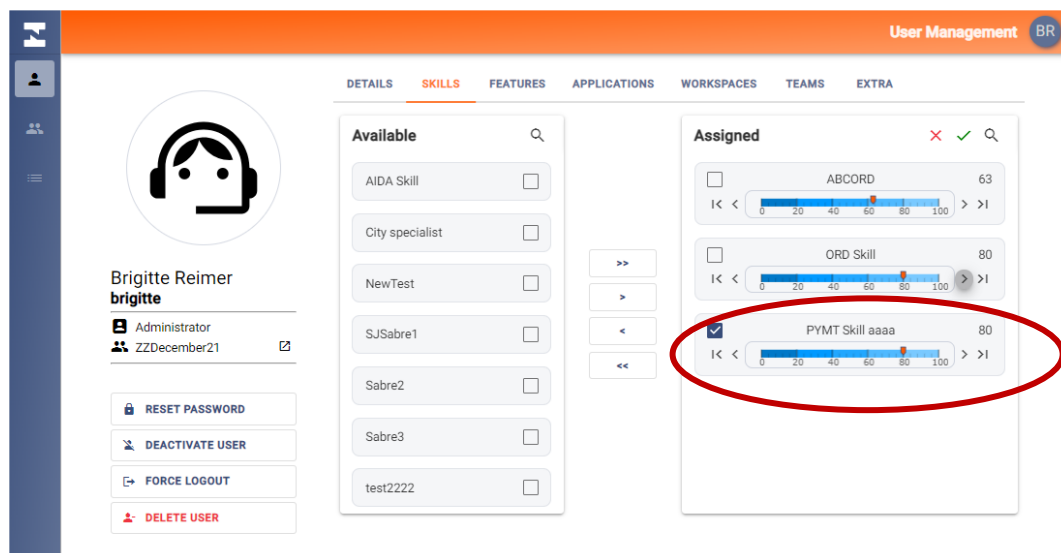
- Use the  **Search** option, to display the relevant skills.
- Select the required skills, and use the **>** arrow, to move the selected skills from the **Available** column on the left into the **Assigned** column on the right.
- To remove selected or all assigned skills, use the **<** or **<<** arrows.



Setting competence levels

To set or edit the competence level for the selected user

- Select the skill assigned, and use the **Ability slider**, to set the user's competence level.
- Alternatively, use the **>** and **>|** or **<** and **<|** arrows to update skill levels.



- To save the changes made, click the  Save icon, to cancel the action, click the **X** icon.
- To delete an unassigned skill, use the  Delete icon.

SABRE™ FOR INBOUND AND OUTBOUND CALL ROUTING

The Skills created in User Management are available in both, the Campaign Manager and the Noetica Route Manager, where they can be used as part of a Skill condition to enhance call routing for Inbound and Outbound campaigns.



A Skill condition consists of a skill, a minimum ability level required for the skill, an ability ranking and/ or mandatory setting.

Skill conditions can be applied to any campaign, call lists and outbound group or to your Inbound route, as required, to ensure that calls will be routed to the most suited agents, taking into consideration the agent's skill and ability.

You can set a skill requirement to be mandatory, with users having the skill or not, and/ or base it on an agent's ability ranking, to ensure that agents with higher skill levels will receive the calls before those with a lower level ability.

The table below shows how the combination of a Skill, Minimum Ability, Ability Ranking and/or a Mandatory Skill setting within a Skill condition will determine the routing process.

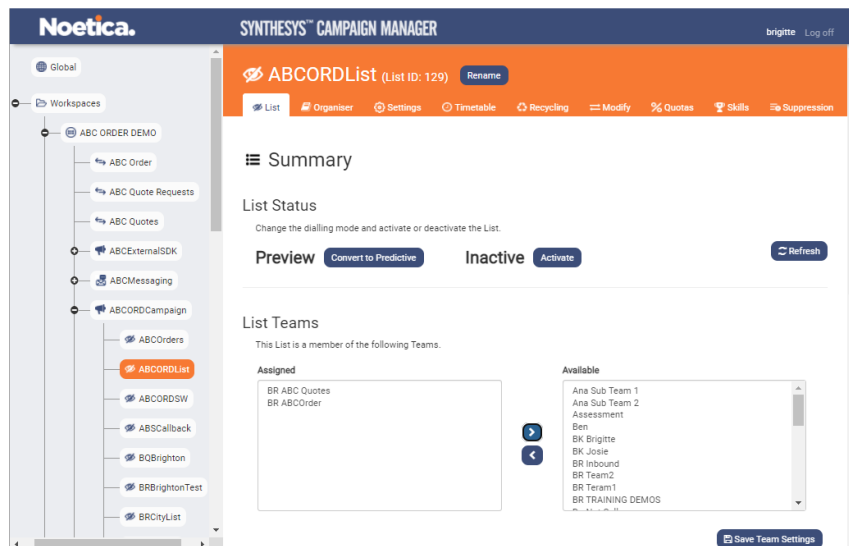
Skill selected	Minimum Ability	Ability Ranking	Mandatory Skill	Description
None	N/A	N/A	N/A	Calls will be delivered to the longest waiting agent.
Selected	Selected %	Off	Off	Calls will be delivered to the longest waiting agent.
Selected	Selected %	On	Off	Agents possessing the skill above (or equal to) the minimum ability level, will get calls according to their ability ranking. Agents not possessing the skill or are below the minimum ability level will only get calls if all skilled agents are busy and will receive such calls according to longest waiting.
Selected	Selected %	Off	On	Agents possessing the skill above (or equal to) the minimum ability level, will get calls according to longest waiting. Agents not possessing the skill or are below the minimum ability level will NOT get any calls at all.
Selected	Selected %	On	On	Agents possessing the skill above (or equal to) the minimum ability level, will get calls according to their ability ranking. Agents not possessing the skill or are below the minimum ability level will NOT get any calls at all.

The next pages will describe in detail how Skill conditions are assigned to Outbound call lists and Inbound route.

SYNTHESYS™ CAMPAIGN MANAGER

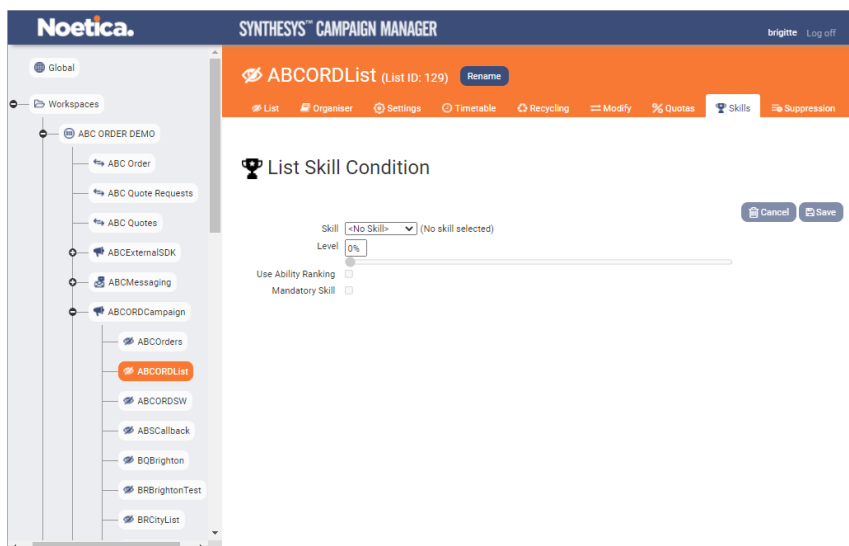
Skill conditions for Outbound call routing are defined in the Campaign Manager.

- Open the Campaign Manager via the Noetica Admin Portal, or
- Enter the URL of your application server into the address field of the web browser, e.g., <http://WebserverName:81/campaignmanager>, and add your username and password, as provided by your system administrator.
- Select the call list (campaign or outbound group) for which you want to define the Skill.



Skills in Outbound Call Routing

- Click the **Skills** tab in the page on right, to open the Skill Condition dialog associated with the selected List (Campaign or Group).



Skill conditions can be applied at campaign, list and outbound group level, by selecting a combination of skill, minimum ability, ability ranking and/ or mandatory skill.

Please see the next page for more information.

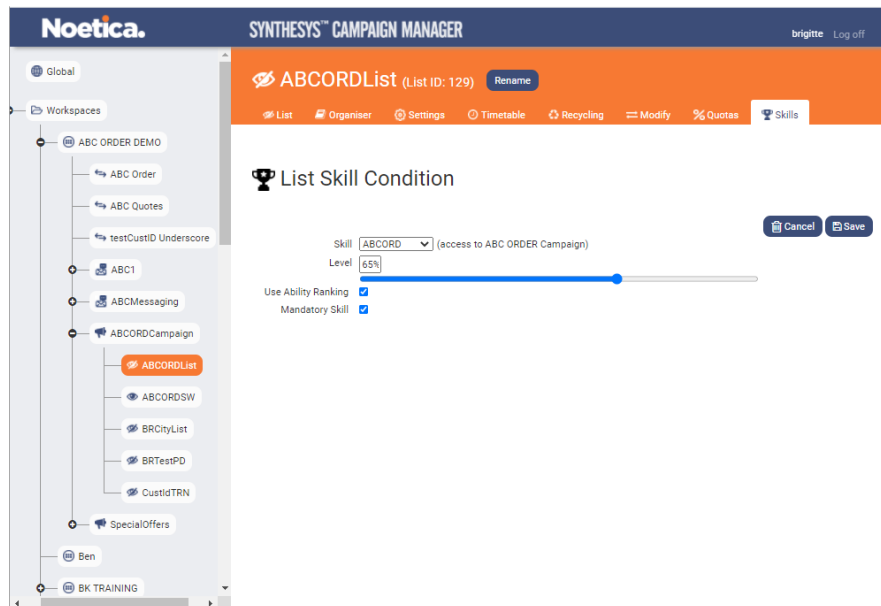
Applying Skill Conditions to Campaigns and Call Lists

You define the Skills required for your campaign, list, or group in the **Skill Condition** dialog.

Any skill condition defined at campaign level is automatically applied to all workable calls (queued and sleeping) in the predictive lists that belong to the campaign, and to all priority call-backs and rescheduled calls.



You can override the campaign setting, by amending the skill condition inherited from the parent campaign at list level, or by removing the skill condition altogether, in which case the calls will be routed to the longest waiting agent instead.



Setting skill and competence level

- Pick the skill to be assigned to the selected list (or campaign) from the **Skill** drop down list.
- Use the **Level** slider, to set the minimum competence level required for this skill.

Applying ability ranking and mandatory skill

To enable skill routing, you must also select an ability ranking and/or mandatory skill, else your skill setting for this list (or campaign) will be ignored.

- Tick **Use Ability Ranking** only, to route calls to the agents who meet the skill requirement, according to their ability, i.e., to the most skilled agents first. If all skilled agents are busy, calls will be presented to agents with lower or no skills, based on the longest waiting.
- Tick **Mandatory Skill** only, to route calls only to agents with the minimum required skill level (or above), according to longest waiting.
- Tick both **Use Ability Ranking** and **Mandatory Skill**, to route calls only to agents with the minimum required skill level (or above), according to their ability ranking.



*If you save your skill condition without setting an ability ranking or mandatory skill, a **Confirm Save** message will notify you that this skill will NOT be used to route calls to agents. To save your settings without using skill routing, click **Save**. To enable skill routing, click **No** and tick **Use Ability Ranking** or **Mandatory Skill**, before saving.*

When applying a mandatory skill to a campaign or list, agents not meeting the minimum skill requirement will not receive any calls from these campaign and lists.

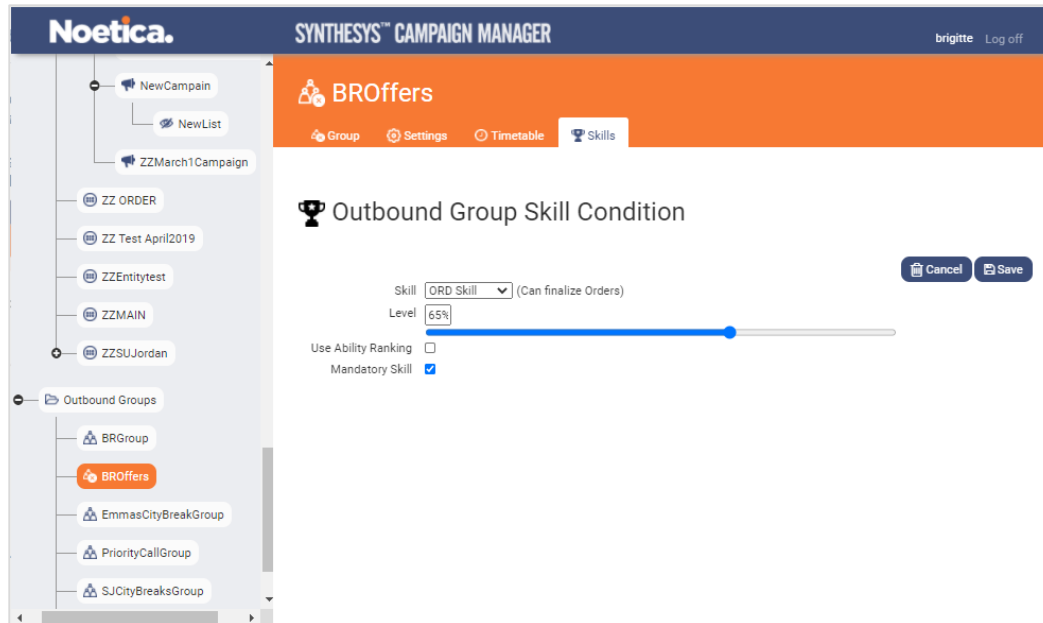
Applying Skill Conditions to Outbound Groups

The Skill condition assigned at group level applies to all calls dialled as part of a group. If no skill condition is set on the group, no skills will be applied to any of the lists within the group, even if skills have been assigned to these lists.



You can however move the same list into multiple groups or dial it outside of a group, thus allowing you to apply different skill conditions to the same list.

- To assign a Skill condition to an Outbound Group, select the relevant group and click the **Skills** tab now displayed in the page on the right.



The screenshot shows the Noetica SYNTHESYS™ CAMPAIGN MANAGER interface. The user is logged in as 'brigitte'. The main content area is titled 'BROffers' and has tabs for 'Group', 'Settings', 'Timetable', and 'Skills'. The 'Skills' tab is active, showing the 'Outbound Group Skill Condition' configuration for the 'BROffers' group. The configuration includes a 'Skill' dropdown menu set to 'ORD Skill' (with a note '(Can finalize Orders)'), a 'Level' slider set to '65%', and two checkboxes: 'Use Ability Ranking' (unchecked) and 'Mandatory Skill' (checked). There are 'Cancel' and 'Save' buttons in the top right corner of the configuration area. On the left sidebar, under 'Outbound Groups', the 'BROffers' group is highlighted.

Setting skill and competence level

- From the **Skill** drop down menu, pick the skill that you wish to apply to the group.
- Use the **Level** slider, to set the minimum competence level required for the selected skill.

Applying ability ranking and mandatory skill

To enable skill routing, you must also set an ability ranking and/ or a mandatory skill.

- Tick **Use Ability Ranking** only, to route calls to agents with the required skills, according to their ability, i.e., to the most skilled agents first, before filtering down to the longest waiting agent, if all agents with matching skill level are busy.
- Tick **Mandatory Skill** only, to present the calls exclusively to agents who meet the relevant skill requirement, based on longest waiting.
- Tick both, **Use Ability Ranking** and **Mandatory Skill**, to present calls exclusively to agents who meet the relevant skill requirement, based on their ability ranking.



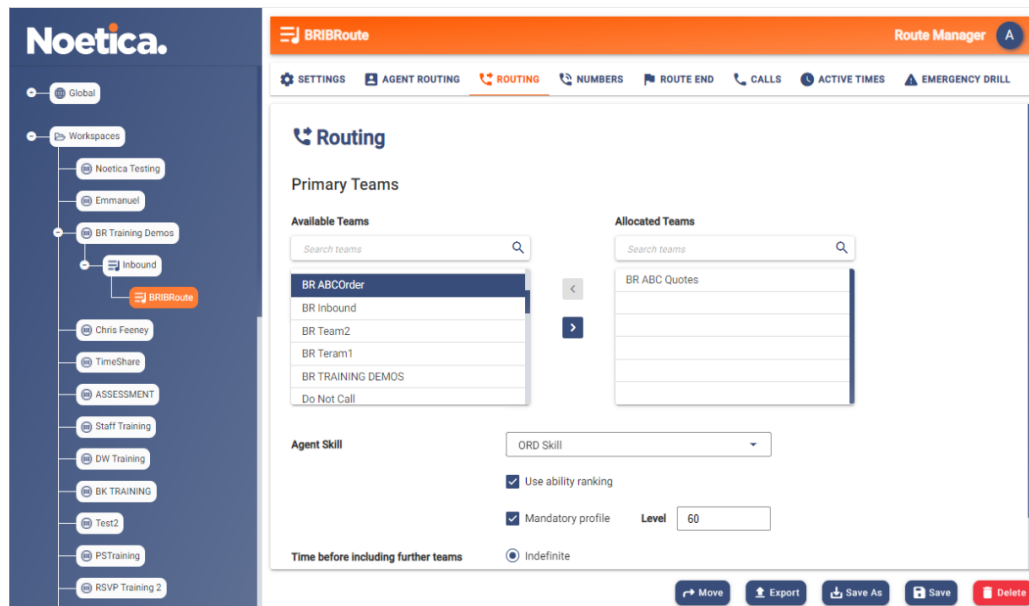
If you save your skill condition without setting an ability ranking or mandatory skill, a **Confirm Save** message will notify you that this skill will NOT be used to route calls to agents. To save your settings without using skill routing, click **Save**. To enable skill routing, click **No** and select Use Ability Ranking and/ or Mandatory Skill, before saving.

NOETICA ROUTE MANAGER

Skills in Inbound Call Routing

For Inbound call routing, skill conditions are specified in the **Noetica Route Manager**.

- Open the Route Manager via the Noetica Admin Portal, or
- Enter the URL of your application server into the address field of the web browser, e.g., <http://WebserverName/routemanager>.
- Add your username and password, as provided by your system administrator.



- In the Route Manager, select the relevant **Inbound Route** and then the **Routing** tab.
- Skill conditions can be applied to **Primary Teams** section, and to further teams, if the **Use Time before including further Teams** option is used to route the call to a secondary, and additional teams.

A Skill Condition can be defined at any available team routing levels, by selecting a combination of skill, minimum ability, ability ranking and/ or mandatory profile.



When using multiple team routing to include agents from a secondary and additional team level, the skill condition assigned at that team level will apply to ALL the agents and any skill condition defined at the team level above will be ignored.

This is particularly important when you apply a mandatory profile to one of the team levels, as in this instance calls will ONLY be delivered to agents who meet or exceed the minimum skill requirement. NO calls at all will be routed to agents with skills below the skill requirement set, or to agents with a different skill assignment.

To avoid calls NOT being answered or to extend, rather than restrict your pool of agents, you may want to apply 'Use ability ranking' only, especially at the last tier of your routing. This way calls will be routed to agents with the required skills first, according to their ability ranking, but include agents with lower or no skills, based on the longest waiting, if your more skilled agents are busy.

Applying Skill Conditions to the Route

Each team routing level gives you the option to route calls based on a skill condition.



If you define a skill condition at Primary Teams level only, the routing moves to the next team levels and calls will be delivered to agents based on longest waiting. If you define a skill condition at Additional Teams level only, the calls will initially be routed based on longest waiting, until the routing moves to include the additional teams, at which point the skill condition applied at the Additional Teams level is used for routing calls.

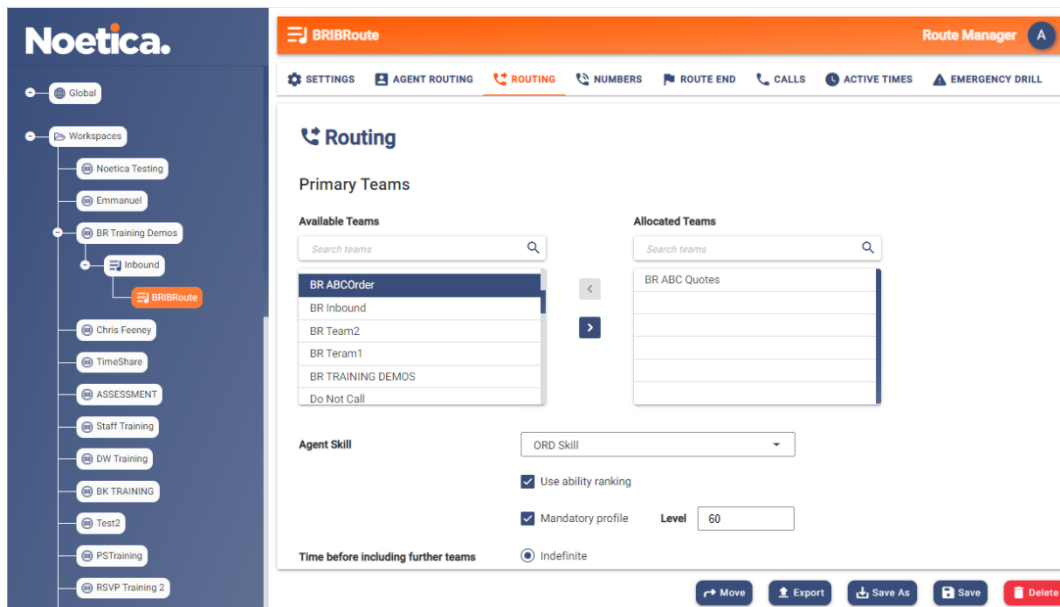
Setting skill and competence level

- If **Agent Skill** routing is to be applied, pick the skill condition that you wish to apply to the team level from the **Skill** drop down list.
- Set the minimum competence level required for the selected skill.

Applying ability ranking and mandatory profile

To enable skill-based routing on any of the available team levels, also set an ability ranking and/or mandatory skill, else the skill settings at this team level will be ignored.

- Tick **'Use ability ranking'** to route calls to agents with a skill above (or equal to) the minimum ability level set, according to their ability ranking, but to also include agents with lower or no skills based on a longest waiting agent, if the more skilled agents are busy.
- Tick **Mandatory profile**, to route calls exclusively to agents who meet the skill level assigned, according to longest waiting.
- Tick both **Use ability ranking** and **Mandatory profile**, to route calls exclusively to agents who meet the relevant skill requirement, based on their ability ranking.



The screenshot shows the Noetica BRIRoute interface. The left sidebar contains a navigation menu with 'Global' and 'Workspaces' sections. The main content area is titled 'Routing' and shows 'Primary Teams' settings. It includes two columns: 'Available Teams' and 'Allocated Teams'. The 'Available Teams' list includes 'BR ABCOrder', 'BR Inbound', 'BR Team2', 'BR Teram1', 'BR TRAINING DEMOS', and 'Do Not Call'. The 'Allocated Teams' list includes 'BR ABC Quotes'. Below these lists, there are settings for 'Agent Skill' (set to 'ORD Skill'), 'Use ability ranking' (checked), 'Mandatory profile' (checked), and 'Level' (set to 60). There is also a 'Time before including further teams' setting set to 'Indefinite'. At the bottom right, there are buttons for 'Move', 'Export', 'Save As', 'Save', and 'Delete'.



*When applying a **mandatory** setting to a skill condition, NO calls will be assigned to agents, if they do not meet the skill assignment. This may result in calls being missed, if there not enough agents with the required minimum skill or above available at each team level to answer the calls.*