IS Training Assessment - Basic

A non-exhaustive list of topics for a basic training assessment for Amtelco Intelligent Series (IS) Supervisor.

Basic I

This level focuses on identifying the components of IS Supervisor, navigating around, and understanding the basic elements of a script.

Introduction to IS Supervisor

- Identify the IS Supervisor application icon

- Access the IS Supervisor settings and preferences

- Understand how to change the IS Supervisor profile and station number

- Logging in and out of IS Supervisor

- Identify each navigation section (Agent, Client, Directory & Scheduling, System Schedule, System, Monitor)

- Window management, including docking, tiling, maximizing, and minimizing

- Navigating to an account and identifying client account numbers and client names

- Creating and deleting IS Client Accounts

- Finding the `Intelligent Messages` section of a Client account

- Script elements (palette) for basic messages (`drag and drop` or `right-click -> insert`)

- Simple script walkthrough to identify `Intialize`, `Start`, `Screens`, and `Complete` nodes

- Differences between `Save` and `Activate` actions when working with script changes.

- Be able to determine the active script for each script option (`Agent`, `Web Scripting`, `MergeComm`, `Public Web Scripting`)

- Navigate between `Tree View` and `Test Drive` modes

Practice Examples

- Locate and open IS Supervisor and login with your assigned account.

- Change your station profile or station number to match a logged-in user and see what happens.

- Create a test account if you don't have one

- Find the `Intelligent Messages` section of a Client account

- Describe the nodes in a script including `Intialize`, `Start`, `Screens`, and `Complete`

- Drag-and-drop elements from the palette into a script and Save/Activate

- Use `Tree View` to add Palette elements and then `Test Drive` to see what they look like

Basic II

This level focuses on creating and editing scripts, including the use of screens, input types, and calculation types.

- Open a script in your test account
- Import a script to your test account from file
- Export your active script to a file
- View and manage the Template list
- Import a script to the Template list from file
- Export your active script to the Template list
- Adding a screen to your script and customizing the `Name` and `Description`
- Understand the "Order of execution" for screens and nodes
- Add a `List` script element and a `List Branch` action
- `Navigate` between screens based on `List Branch` items
- Use a `Case Branch` in place of the same `List Branch`
- Understand `List Branch` refresh requirements when values are changed
- Use `Test Drive` to test your navigation flow

Practice Examples

Create basic accounts with navigation using `List Branch` or `Case Branch`:

- Medical account that takes patient and hospital calls
- Property management company that handles maintenance, billing, and office calls
- IT Services Company that handles support and office calls, and support calls can be Priority 1 (Emergency), Priority 2 (Impact), Priority 3 (Non-Urgent)

Basic III

- What are Advanced Expressions?
- Creating Message Summaries *manually* or using Auto-Summary
- Using Advanced Expressions in Script Elements (Right-Click Properties)
- Using `Named expressions` in the script's `Script` node
- The Advanced Expression Editor UI and tips/tricks/shortcuts
- Recognize the Arrow Down option to change between Advanced Expressions and other types
- Use `Logic` functions `AND`, `NOT`, `OR` and `>`, `<`, `=`, `<>` in Advanced Expressions

- Evaluate Expressions using the `IIF` function within Advanced Expressions

- Using the `Test` button before assuming any change is working!

- Nesting logic using `IIF` statements and `Line Continuation` characters

- Integrating script fields into Advanced Expressions

- Doing Math and basic calculation

- String functions (`IsEmpty()`)

- `Left` / `Mid` / `Right` for formatting phones

- Date and Time functions (`Now()`, `Date()`, `Time()`)

Practice Examples

- Split a "Name" field into "Firstname" and "Lastname"

- Format a 10-digit phone number into `(###) ###-####`

- Format a 10-digit phone number into `###-###-####`

- Create a closing message based on the time of day

- Create a transition message based on a script's `List` selection

- Calculate the cost based on Quantity and Price of an item

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