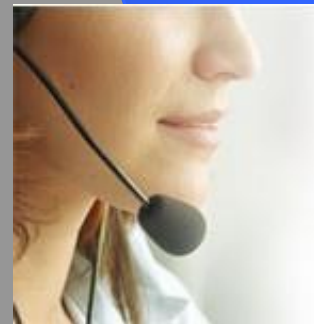
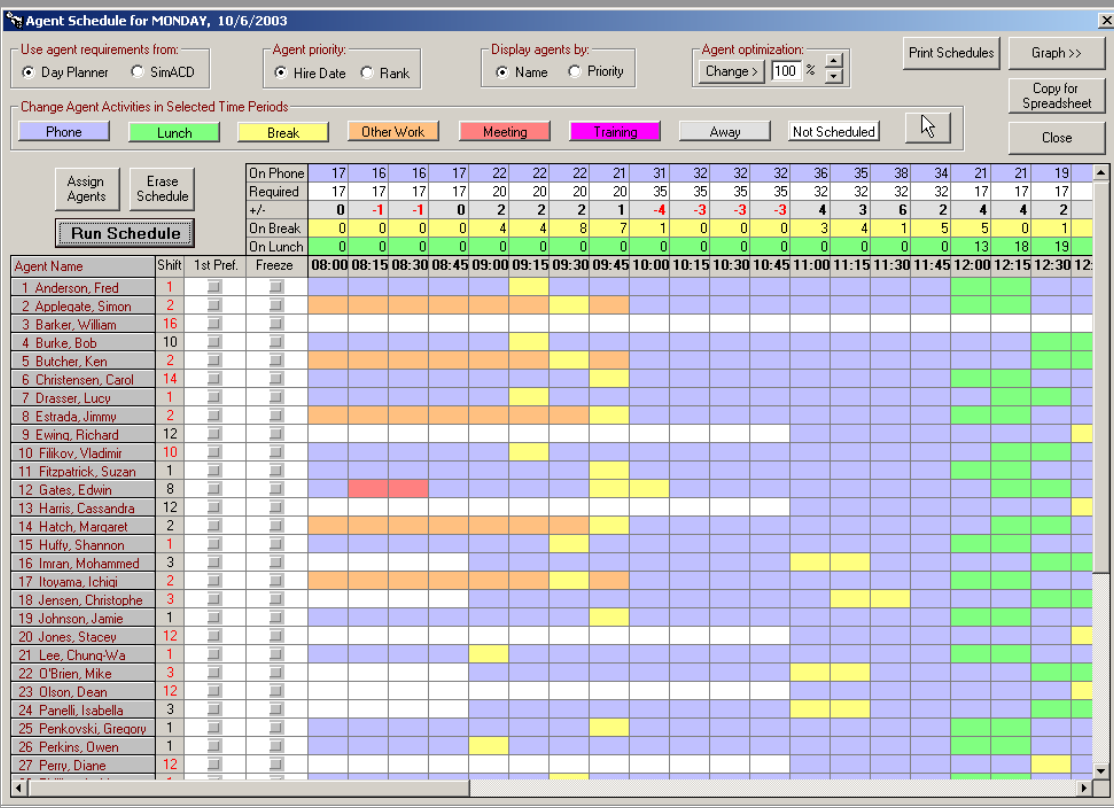


## Overview

- Portage Communications, LLC., founded in 1994, creates and markets call center workforce management software for maximum productivity.
- *Call Center Designer*™ is used to calculate optimum agent levels based on desired service levels. *SimACD*™ provides the industry's best software simulation of ACD dynamics that simulates call handling, queuing, abandonment, caller re-try, overflow and blockage. The *AgentTime*™ Scheduler fills out this product line to create a complete and affordable call center workforce management solution for small and medium sized call centers.
- *AgentTime* allows organizations to *manage their agents*, not their workforce management system.



## Product Overview



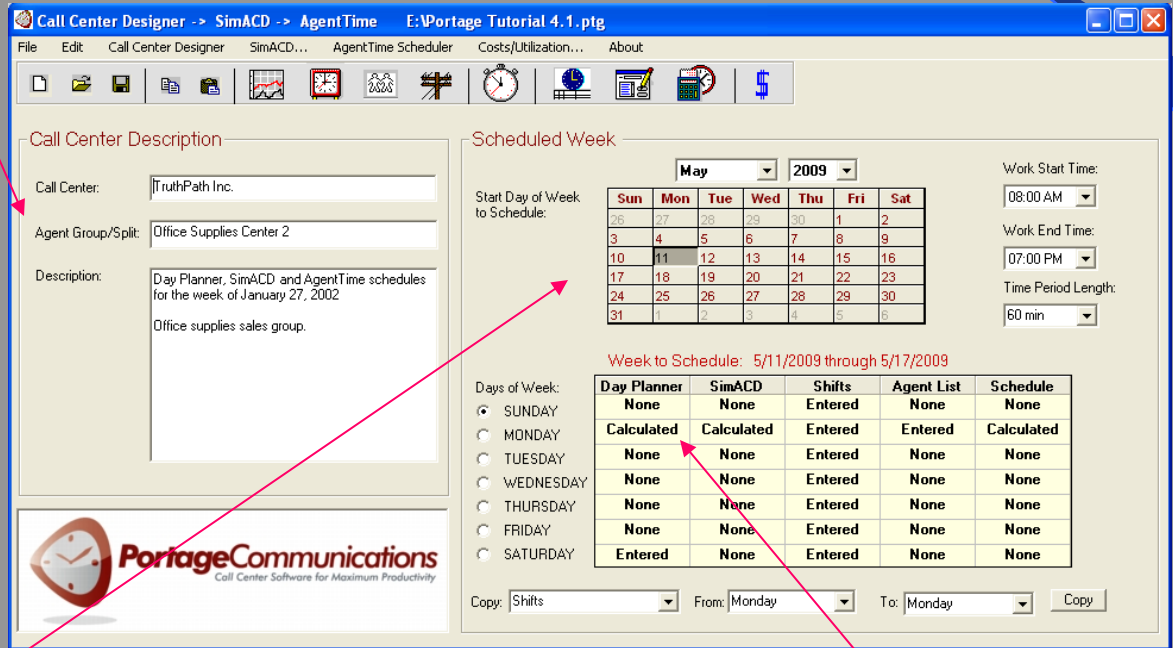
- An affordable agent scheduling solution designed specifically for small and medium sized call centers.
- AgentTime creates optimal agent employee schedules from a database of shift definitions, agent availabilities, agent preferences and agent priorities.
- Uses the agent level requirements for each time period in a call center's workweek determined by Portage's Call Center Designer Day Planner and SimACD staffing software.

## Create a Week's Schedule With These Simple Steps:

1. Pick a week to schedule with start and stop times.
2. Copy in call data from your ACD or prepared call volume forecast, and modify as needed.
3. Calculate staffing levels with *Day Planner*.
4. Refine staffing levels with Portage's unique *SimACD*.
5. Define work shifts and lists of available agents.
6. Run an *AgentTime* schedule, and modify as needed.
7. Publish schedules as reports in Excel or HTML format for your agents to view.

## Create a Week's Schedule One Day at a Time

- Enter agent group description



**Call Center Description**

Call Center: TruthPath Inc.

Agent Group/Split: Office Supplies Center 2

Description: Day Planner, SimACD and AgentTime schedules for the week of January 27, 2002.  
Office supplies sales group.

**Scheduled Week**

May 2009

Work Start Time: 08:00 AM

Work End Time: 07:00 PM

Time Period Length: 60 min

Week to Schedule: 5/11/2009 through 5/17/2009

Day Planner	SimACD	Shifts	Agent List	Schedule
None	None	Entered	None	None
Calculated	Calculated	Entered	Entered	Calculated
None	None	Entered	None	None
None	None	Entered	None	None
None	None	Entered	None	None
None	None	Entered	None	None
Entered	None	Entered	None	None

Days of Week:

SUNDAY

MONDAY

TUESDAY

WEDNESDAY

THURSDAY

FRIDAY

SATURDAY

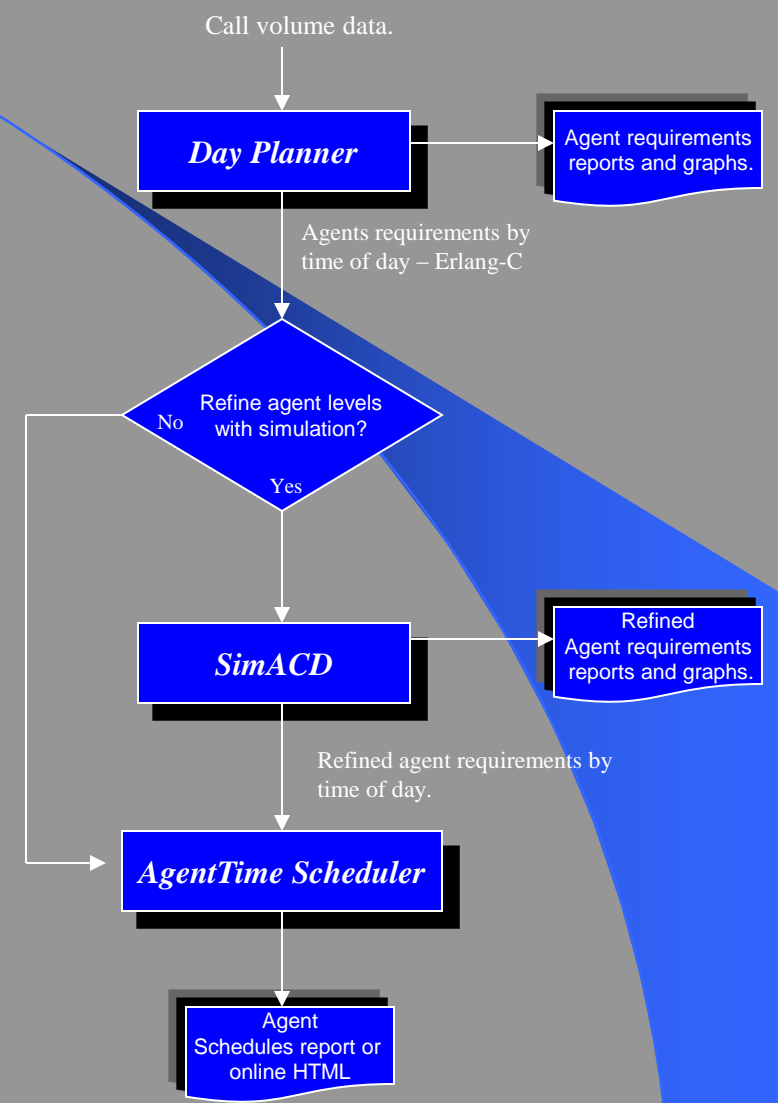
Copy: Shifts From: Monday To: Monday Copy

- Pick week, work start and end times, and time period length (15, 30 or 60 minutes).

- Pick which day of the week to start with.

## Modules

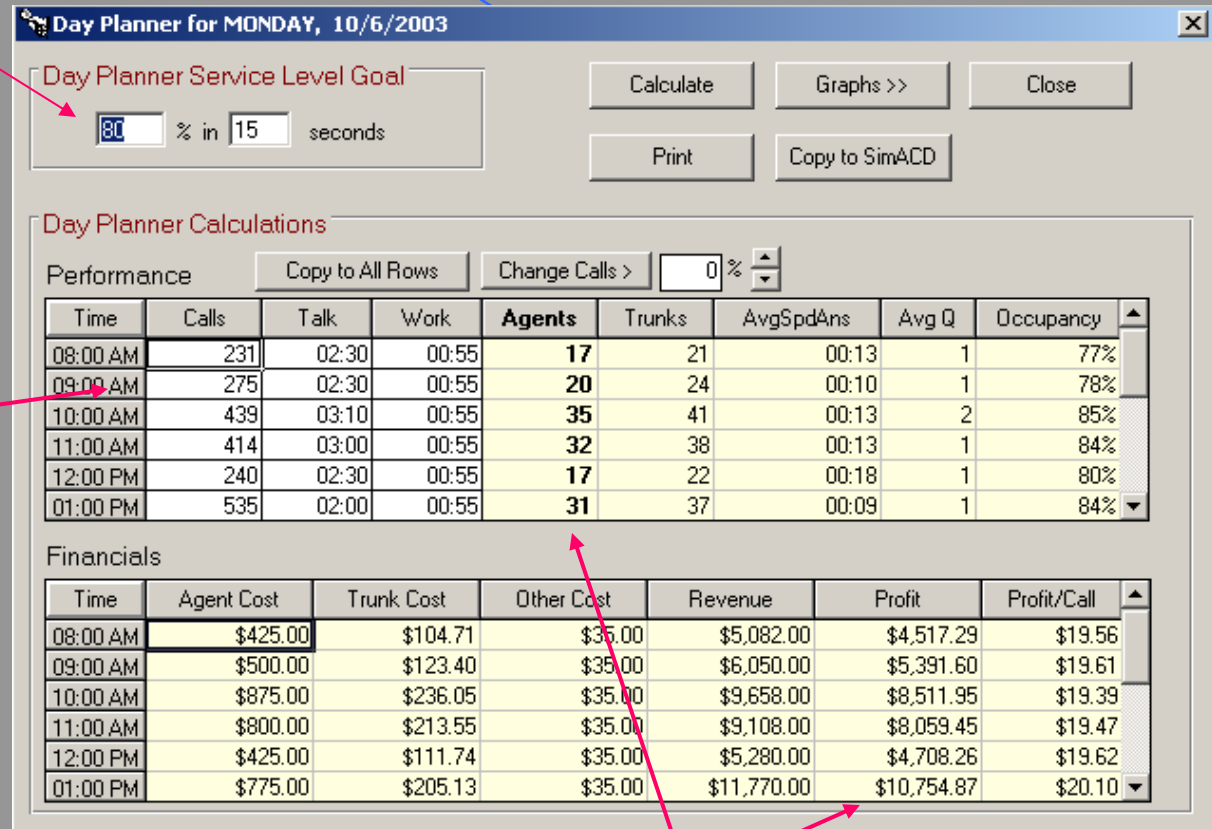
- *Day Planner* uses extended Erlang-C methods to create required agent staffing levels.
- *SimACD* refines those levels using a unique activity-scanning simulation algorithm developed by Portage.
- *AgentTime's* scheduler then creates optimal, yet practical real-world, agent schedules based on the required agent levels and agent availabilities and preferences.



## Day Planner

- Enter service level goal for the day

- Copy from ACD, or manually enter call volumes with avg. talk times and after call work times for each time period in the workday.



**Day Planner for MONDAY, 10/6/2003**

Day Planner Service Level Goal:  % in  seconds

Buttons: Calculate, Graphs >>, Close, Print, Copy to SimACD

Day Planner Calculations

Performance: Copy to All Rows, Change Calls >  %

Time	Calls	Talk	Work	Agents	Trunks	AvgSpdAns	Avg Q	Occupancy
08:00 AM	231	02:30	00:55	17	21	00:13	1	77%
09:00 AM	275	02:30	00:55	20	24	00:10	1	78%
10:00 AM	439	03:10	00:55	35	41	00:13	2	85%
11:00 AM	414	03:00	00:55	32	38	00:13	1	84%
12:00 PM	240	02:30	00:55	17	22	00:18	1	80%
01:00 PM	535	02:00	00:55	31	37	00:09	1	84%

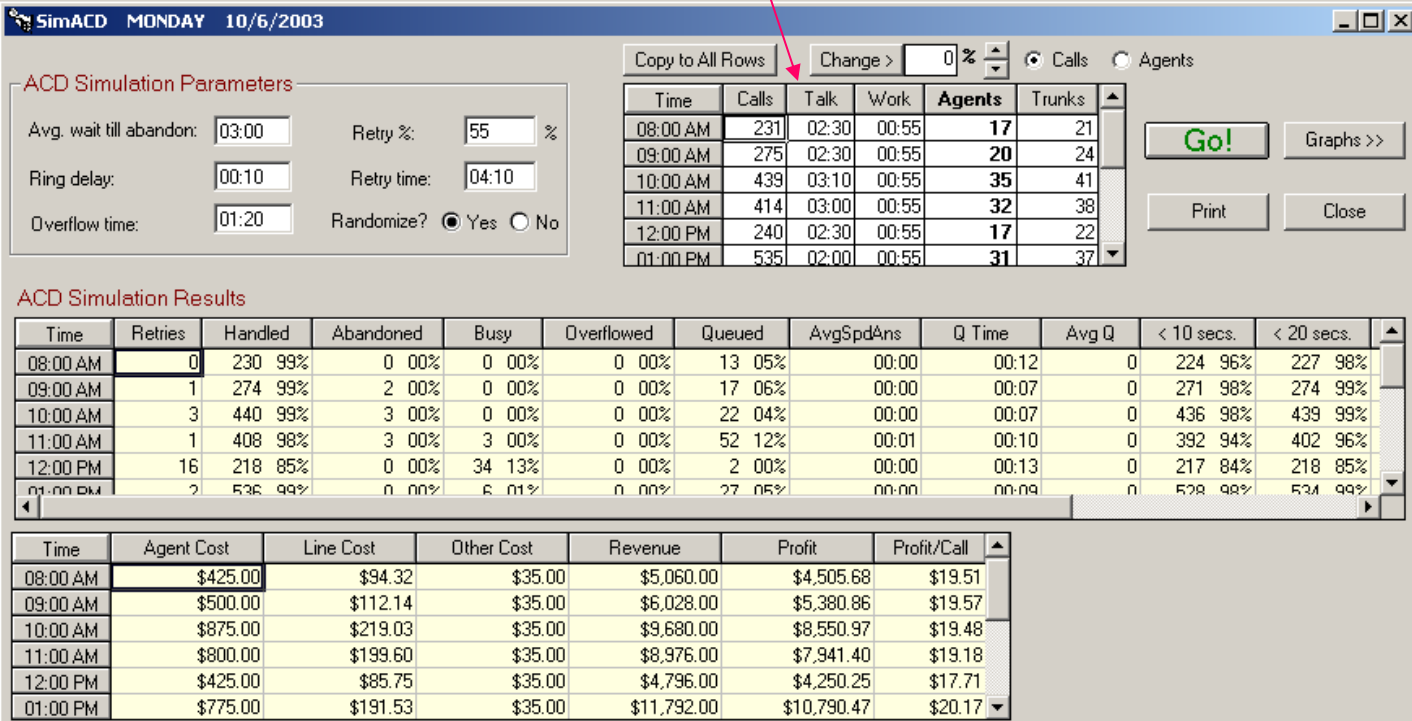
Financials

Time	Agent Cost	Trunk Cost	Other Cost	Revenue	Profit	Profit/Call
08:00 AM	\$425.00	\$104.71	\$35.00	\$5,082.00	\$4,517.29	\$19.56
09:00 AM	\$500.00	\$123.40	\$35.00	\$6,050.00	\$5,391.60	\$19.61
10:00 AM	\$875.00	\$236.05	\$35.00	\$9,658.00	\$8,511.95	\$19.39
11:00 AM	\$800.00	\$213.55	\$35.00	\$9,108.00	\$8,059.45	\$19.47
12:00 PM	\$425.00	\$111.74	\$35.00	\$5,280.00	\$4,708.26	\$19.62
01:00 PM	\$775.00	\$205.13	\$35.00	\$11,770.00	\$10,754.87	\$20.10

- Calculate Erlang-C agent levels and other predicted values.

## SimACD™

- Enter in caller abandonment and retry behavior along with ACD ring delay and any overflow timer.
- Copy call volumes and agent levels from Day Planner.



**SimACD MONDAY 10/6/2003**

Copy to All Rows Change > 0%  Calls  Agents

**ACD Simulation Parameters**

Avg. wait till abandon: 03:00 Retry %: 55 %  
 Ring delay: 00:10 Retry time: 04:10  
 Overflow time: 01:20 Randomize?  Yes  No

Time	Calls	Talk	Work	Agents	Trunks
08:00 AM	231	02:30	00:55	17	21
09:00 AM	275	02:30	00:55	20	24
10:00 AM	439	03:10	00:55	35	41
11:00 AM	414	03:00	00:55	32	38
12:00 PM	240	02:30	00:55	17	22
01:00 PM	535	02:00	00:55	31	37

Go! Graphs >> Print Close

**ACD Simulation Results**

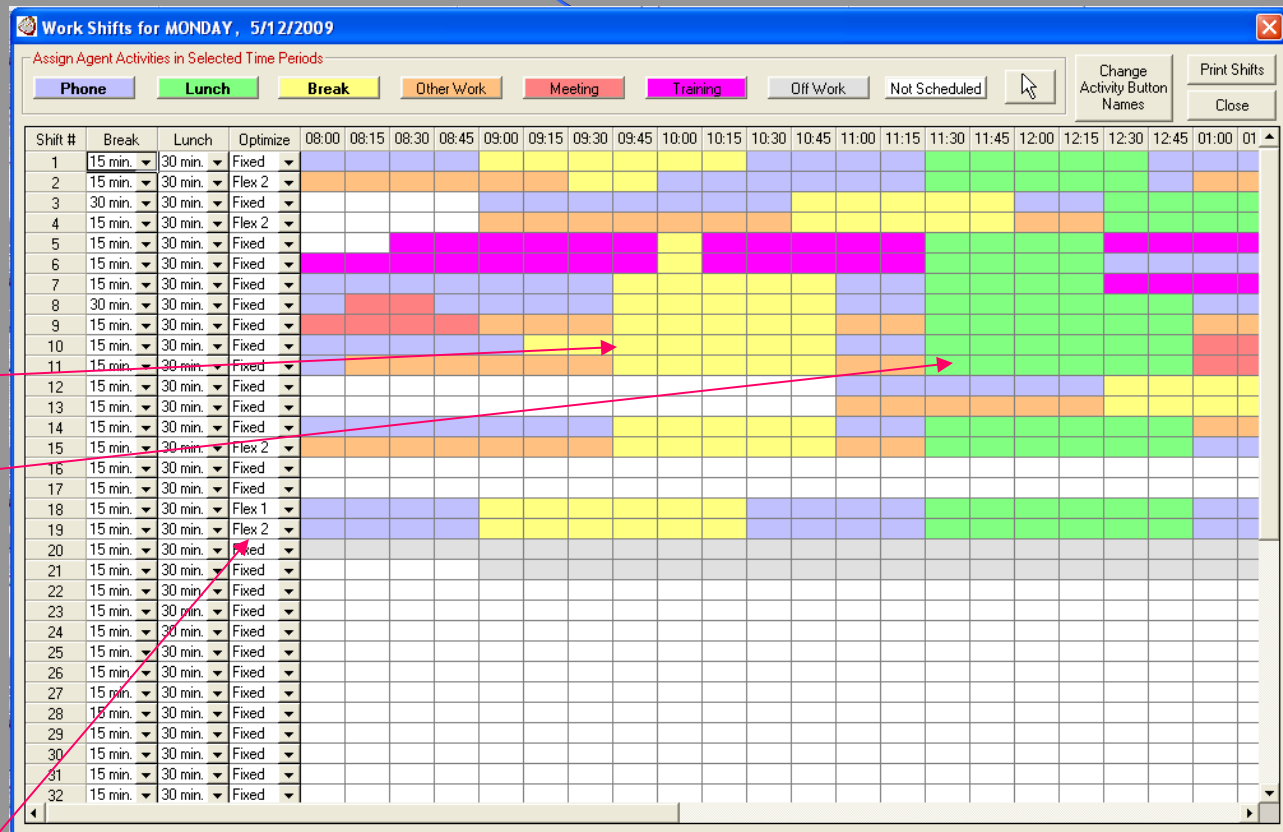
Time	Retries	Handled	Abandoned	Busy	Overflowed	Queued	AvgSpdAns	Q Time	Avg Q	< 10 secs.	< 20 secs.
08:00 AM	0	230 99%	0 00%	0 00%	0 00%	13 05%	00:00	00:12	0	224 96%	227 98%
09:00 AM	1	274 99%	2 00%	0 00%	0 00%	17 06%	00:00	00:07	0	271 98%	274 99%
10:00 AM	3	440 99%	3 00%	0 00%	0 00%	22 04%	00:00	00:07	0	436 98%	439 99%
11:00 AM	1	408 98%	3 00%	3 00%	0 00%	52 12%	00:01	00:10	0	392 94%	402 96%
12:00 PM	16	218 85%	0 00%	34 13%	0 00%	2 00%	00:00	00:13	0	217 84%	218 85%
01:00 PM	2	536 99%	0 00%	6 01%	0 00%	27 05%	00:00	00:09	0	528 98%	534 99%

Time	Agent Cost	Line Cost	Other Cost	Revenue	Profit	Profit/Call
08:00 AM	\$425.00	\$94.32	\$35.00	\$5,060.00	\$4,505.68	\$19.51
09:00 AM	\$500.00	\$112.14	\$35.00	\$6,028.00	\$5,380.86	\$19.57
10:00 AM	\$875.00	\$219.03	\$35.00	\$9,680.00	\$8,550.97	\$19.48
11:00 AM	\$800.00	\$199.60	\$35.00	\$8,976.00	\$7,941.40	\$19.18
12:00 PM	\$425.00	\$85.75	\$35.00	\$4,796.00	\$4,250.25	\$17.71
01:00 PM	\$775.00	\$191.53	\$35.00	\$11,792.00	\$10,790.47	\$20.17

- Run a simulation and view results. Readjust agent levels and run more simulations to create final perfected agent levels.

## Define Work Shifts

- A shift is a combination of start time, end time and color-coded work and non-work activities by time period.
- Windows of possible break and lunch times are also defined.
- The more shift definitions, the more ways agents can be scheduled.
- Shifts may be defined as “Flex” which will blend in outbound duty where possible.





## Create Agent List

- For each agent, enter name, hire date or rank.

- Enter in all the shifts that the agent is available to work in order of preference.

**Agent List for MONDAY, 10/6/2003**

Name:

Hire Date:

Sun	Mon	Tue	Wed	Thu	Fri	Sat
31	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	1	2	3	4	5	6
7	8	9	10	11	12	13

Rank:

Shift Availability by Preference:

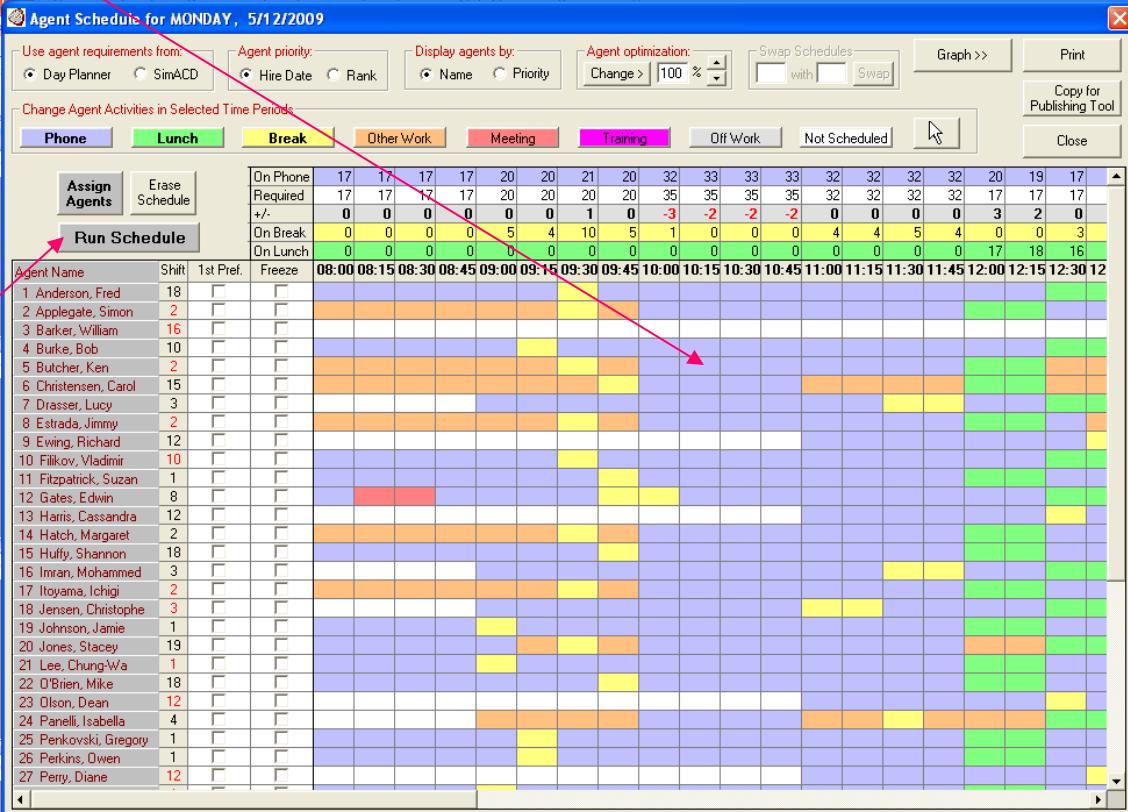
Preference	Shift #
1	3
2	1
3	15
4	14
5	
6	
7	
8	
9	
10	

Buttons: Add This Agent to Agent List >>, Change Selected Agent in Agent List, Delete Selected Agent from Agent List, Print Agent List, Close

Agent Name	HireDate	Rank	Shifts	# Agents:
Anderson, Fred	03-15-00	80	1 3 8	40
Applegate, Simon	01-22-99	50	2 4 9	
Barker, William	07-13-98	2	16 17	
Burke, Bob	01-11-01	11	11 10 12 13	
Butcher, Ken	10-12-00	7	2 4	
Christensen, Carol	10-24-99	12	14 15 16 17	
Drasser, Lucy	10-08-98	45	1 3 8 10 12 14 16 17	
Estrada, Jimmy	06-11-01	100	2	
Ewing, Richard	08-15-01	30	17 16 12 13	
Filikov, Vladimir	07-08-98	50	10 14 15	
<b>Fitzpatrick, Suzan</b>	<b>02-22-99</b>	<b>8</b>	<b>3 1 15 14</b>	
Gates, Edwin	09-01-99	88	9 8 10 11 14 15	
Harris, Cassandra	10-24-98	6	17 16 13 12	
Hatch, Margaret	04-22-01	70	4 2	
Huffy, Shannon	04-12-00	40	1 2 3 4 8 9 10 11	
Imran, Mohammed	12-01-99	3	1 3 8 10	
Itoyama, Ichigi	01-01-01	1	2 4 9 11	
Jensen, Christophe	09-10-00	60	3 4 12 13	
Johnson, Jamie	06-30-98	6	17 16 13 12 4 3 2 1	
Jones, Stacey	09-08-01	9	12 13	
Lee, Chung-Wa	09-19-99	5	1 2	
O'Brien, Mike	08-09-99	17	3 4	
Olson, Dean	06-13-99	10	12 13 16 17	
Panelli, Isabella	12-16-01	99	1 2 3 4	
Penkovski, Gregory	08-31-00	7	2 4 1 3	
Perkins, Owen	07-07-99	77	8 9 10 1 2	
Perry, Diane	05-08-01	15	12 13 11 10	
Phillips, Judd	08-12-98	4	1 2 3 4 8 9 10 11 12 13	
Sasaki, Kazuhiro	06-25-01	55	12 13 3 4	
Shaffer, Casey	03-25-01	87	16 17 12 13	
Smith, Brian	05-10-00	10	3 4	
Stillman, Lenore	02-28-00	55	12 13 3 4	
Sulikowski, Samuel	03-03-00	99	1 2	
Thompson, Terry	04-19-99	85	3 4 12 13	
Torla, Michael	02-09-00	25	3 4 1 2	
Warren, Raymond	05-01-99	15	16 17 12 13	

## Assign Agents

- Assign all, or some of the agents in the day's agent list to be included in the schedule.
- Unassign agents that are on vacation or otherwise absent.
- Click the Run Schedule button to create an optimal schedule.
- Each of the possible shifts that each agent is available to work, and all possible break and lunch assignments are considered by the scheduler.



**Agent Schedules for MONDAY, 5/12/2009**

Use agent requirements from:  Day Planner  SimACD Agent priority:  Hire Date  Rank Display agents by:  Name  Priority Agent optimization: Change > 100 % Swap Schedules with Swap Graph >> Print

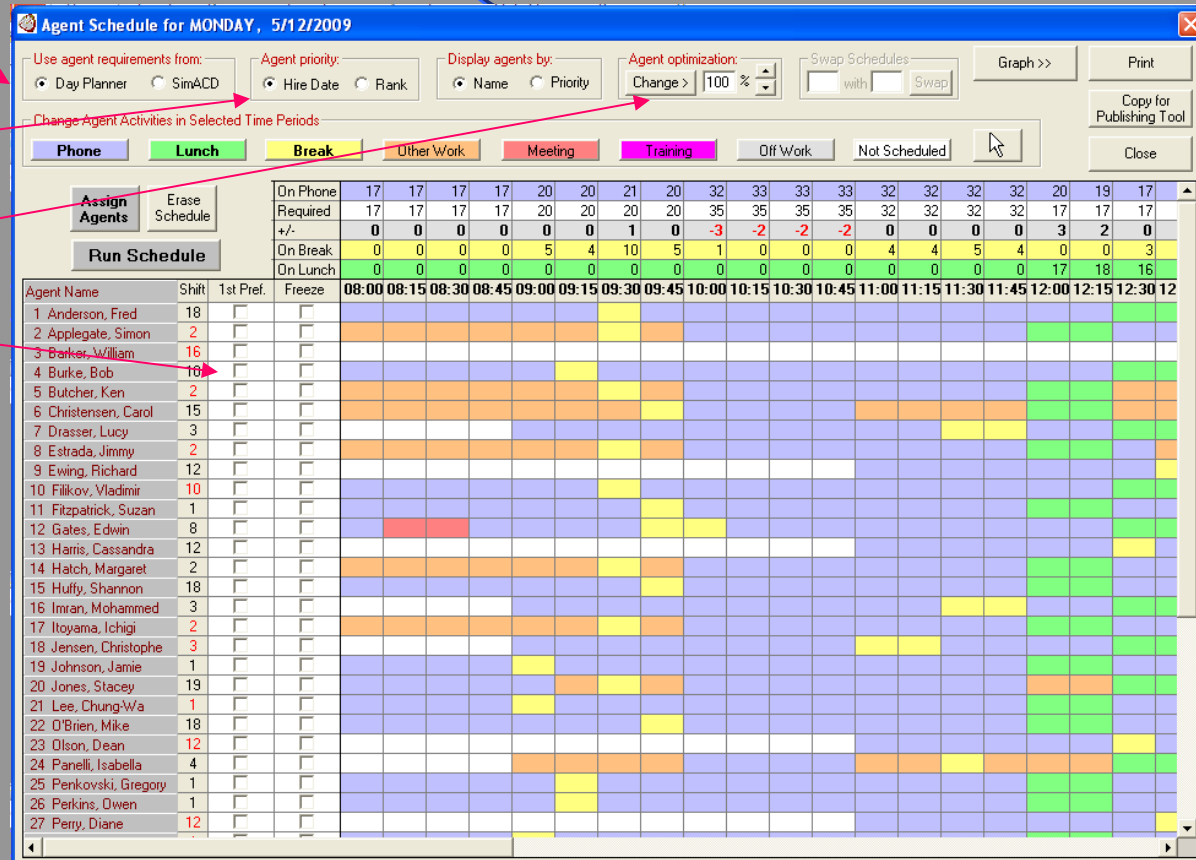
Change Agent Activities in Selected Time Periods: Phone Lunch Break Other Work Meeting Training Off Work Not Scheduled

Assign Agents Erase Schedule Run Schedule

Agent Name	Shift	1st Pref.	Freeze	08:00	08:15	08:30	08:45	09:00	09:15	09:30	09:45	10:00	10:15	10:30	10:45	11:00	11:15	11:30	11:45	12:00	12:15	12:30	12	
1 Anderson, Fred	18																							
2 Applegate, Simon	2																							
3 Barker, William	16																							
4 Burke, Bob	10																							
5 Butcher, Ken	2																							
6 Christensen, Carol	15																							
7 Drasser, Lucy	3																							
8 Estrada, Jimmy	2																							
9 Ewing, Richard	12																							
10 Filkov, Vladimir	10																							
11 Fitzpatrick, Suzan	1																							
12 Gates, Edwin	8																							
13 Harris, Cassandra	12																							
14 Hatch, Margaret	2																							
15 Huff, Shannon	18																							
16 Imran, Mohammed	3																							
17 Itoyama, Ichigi	2																							
18 Jensen, Christophe	3																							
19 Johnson, Jamie	1																							
20 Jones, Stacey	19																							
21 Lee, Chung-Wa	1																							
22 O'Brien, Mike	18																							
23 Olson, Dean	12																							
24 Panelli, Isabella	4																							
25 Penkovski, Gregory	1																							
26 Perkins, Owen	1																							
27 Perry, Diane	12																							

## Run the Schedule

- Take required agent levels from Day Planner or SimACD.
- Schedule for shift preferences by seniority or a ranking system.
- Allow some agents, or a percentage, to always get their first preferred shift.
- The scheduler tries each shift each agent is available for and picks the best one to meet the required agent levels.
- It attempts to give the agents' their more preferred shifts.
- Optimal break/lunch placement and blending of outbound duty.



**Agent Schedule for MONDAY, 5/12/2009**

Use agent requirements from:  Day Planner  SimACD Agent priority:  Hire Date  Rank Display agents by:  Name  Priority Agent optimization: Change > 100 % Swap Schedules: with Swap Graph >> Print Copy for Publishing Tool Close

Change Agent Activities in Selected Time Periods: Phone Lunch Break Other Work Meeting Training Off Work Not Scheduled

Assign Agents Erase Schedule Run Schedule

On Phone Required	17	17	17	17	20	20	20	20	21	20	35	35	35	35	32	32	32	32	20	19	17
+/-	0	0	0	0	0	0	1	0	-3	-2	-2	-2	0	0	0	0	0	0	3	2	0
On Break	0	0	0	0	5	4	10	5	1	0	0	0	4	4	5	4	0	0	0	0	3
On Lunch	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	17	18	16

Agent Name	Shift	1st Pref.	Freeze	08:00	08:15	08:30	08:45	09:00	09:15	09:30	09:45	10:00	10:15	10:30	10:45	11:00	11:15	11:30	11:45	12:00	12:15	12:30	12		
1 Anderson, Fred	18	<input type="checkbox"/>	<input type="checkbox"/>																						
2 Applegate, Simon	2	<input type="checkbox"/>	<input type="checkbox"/>																						
3 Barker, William	16	<input type="checkbox"/>	<input type="checkbox"/>																						
4 Burke, Bob	16	<input type="checkbox"/>	<input type="checkbox"/>																						
5 Butcher, Ken	2	<input type="checkbox"/>	<input type="checkbox"/>																						
6 Christensen, Carol	15	<input type="checkbox"/>	<input type="checkbox"/>																						
7 Drasser, Lucy	3	<input type="checkbox"/>	<input type="checkbox"/>																						
8 Estrada, Jimmy	2	<input type="checkbox"/>	<input type="checkbox"/>																						
9 Ewing, Richard	12	<input type="checkbox"/>	<input type="checkbox"/>																						
10 Filkov, Vladimir	10	<input type="checkbox"/>	<input type="checkbox"/>																						
11 Fitzpatrick, Suzan	1	<input type="checkbox"/>	<input type="checkbox"/>																						
12 Gates, Edwin	8	<input type="checkbox"/>	<input type="checkbox"/>																						
13 Harris, Cassandra	12	<input type="checkbox"/>	<input type="checkbox"/>																						
14 Hatch, Margaret	2	<input type="checkbox"/>	<input type="checkbox"/>																						
15 Hufty, Shannon	18	<input type="checkbox"/>	<input type="checkbox"/>																						
16 Imran, Mohammed	3	<input type="checkbox"/>	<input type="checkbox"/>																						
17 Itoyama, Ichigi	2	<input type="checkbox"/>	<input type="checkbox"/>																						
18 Jensen, Christophe	3	<input type="checkbox"/>	<input type="checkbox"/>																						
19 Johnson, Jamie	1	<input type="checkbox"/>	<input type="checkbox"/>																						
20 Jones, Stacey	19	<input type="checkbox"/>	<input type="checkbox"/>																						
21 Lee, Chung-Wa	1	<input type="checkbox"/>	<input type="checkbox"/>																						
22 O'Brien, Mike	18	<input type="checkbox"/>	<input type="checkbox"/>																						
23 Olson, Dean	12	<input type="checkbox"/>	<input type="checkbox"/>																						
24 Panelli, Isabella	4	<input type="checkbox"/>	<input type="checkbox"/>																						
25 Penkovski, Gregory	1	<input type="checkbox"/>	<input type="checkbox"/>																						
26 Perkins, Owen	1	<input type="checkbox"/>	<input type="checkbox"/>																						
27 Perry, Diane	12	<input type="checkbox"/>	<input type="checkbox"/>																						

## Run the Schedule cont'd

Agent Schedule for MONDAY, 10/6/2003

Use agent requirements from:  Day Planner  SimACD

Agent priority:  Hire Date  Rank

Display agents by:  Name  Priority

Agent optimization: Change > 100 %

Print Schedules Graph >>

Change Agent Activities in Selected Time Periods

Phone Lunch Break Other Work Meeting Training Away Not Scheduled

Assign Agents Erase Schedule

Run Schedule

Agent Name	Shift	1st Pref.	Freeze	08:00	08:15	08:30	08:45	09:00	09:15	09:30	09:45	10:00	10:15	10:30	10:45	11:00	11:15	11:30	11:45	12:00	12:15	12:30	12:45
1 Anderson, Fred	1																						
2 Applegate, Simon	2																						
3 Barker, William	16																						
4 Burke, Bob	10																						
5 Butcher, Ken	2																						
6 Christensen, Carol	14																						
7 Drasser, Lucy	1																						
8 Estrada, Jimmy	2																						
9 Ewing, Richard	12																						
10 Filikov, Vladimir	10																						
11 Fitzpatrick, Suzan	1																						
12 Gates, Edwin	8																						
13 Harris, Cassandra	12																						
14 Hatch, Margaret	2																						
15 Huff, Shannon	1																						
16 Imran, Mohammed	3																						
17 Itovama, Ichiqi	2																						
18 Jensen, Christophe	3																						
19 Johnson, Jamie	1																						
20 Jones, Stacey	12																						
21 Lee, Chung-Wa	1																						
22 O'Brien, Mike	3																						
23 Olson, Dean	12																						
24 Panelli, Isabella	3																						
25 Penkovski, Gregor	1																						
26 Perkins, Owen	1																						
27 Petty, Diane	12																						

- “+/-” row shows difference between # on phone and # required for each time period. The scheduler tries to make each equal to zero.
- Breaks, lunches and other activities may be moved around manually if needed.
- “Freeze” agent schedules that are changed and re-run schedule for further optimization.

## Complete the Week

### Week and Days of Week

**Week Starting Sunday:**

10-05-03 ▾

**Work Start Time:**

08:00 AM ▾

**Work End Time:**

07:00 PM ▾

**Time Period Length:**

60 min ▾

- Sunday
- Monday
- Tuesday
- Wednesday
- Thursday
- Friday
- Saturday

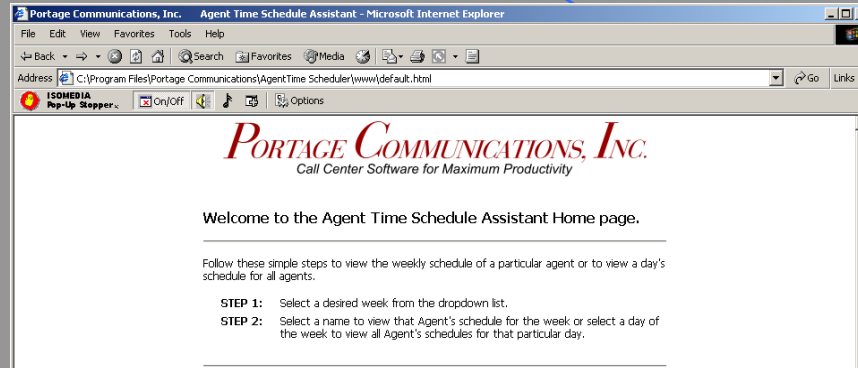
Copy to Week	Copy to Week	Copy to Week	Copy to Week	Copy to Week
Day Planner	SimACD	Shifts	Agent List	Schedule
None	None	Entered	None	None
Calculated	Calculated	Entered	Entered	Calculated
None	None	Entered	None	None
None	None	Entered	None	None
None	None	Entered	None	None
None	None	Entered	None	None
Entered	None	Entered	None	None

After creating a day's schedule, the shift definitions, agent lists and other modules can be copied to the rest of the week.

Modify the shifts and agent lists, and run a schedule for each day to complete the week.

## Publish Schedules

- Daily schedules for the entire agent group, or weekly schedules for each agent may be published.
- Reports for printing or an Excel and HTML formats may be created for publishing the schedules on a web site or server drive.
- Reports can be color-coded or character-coded.

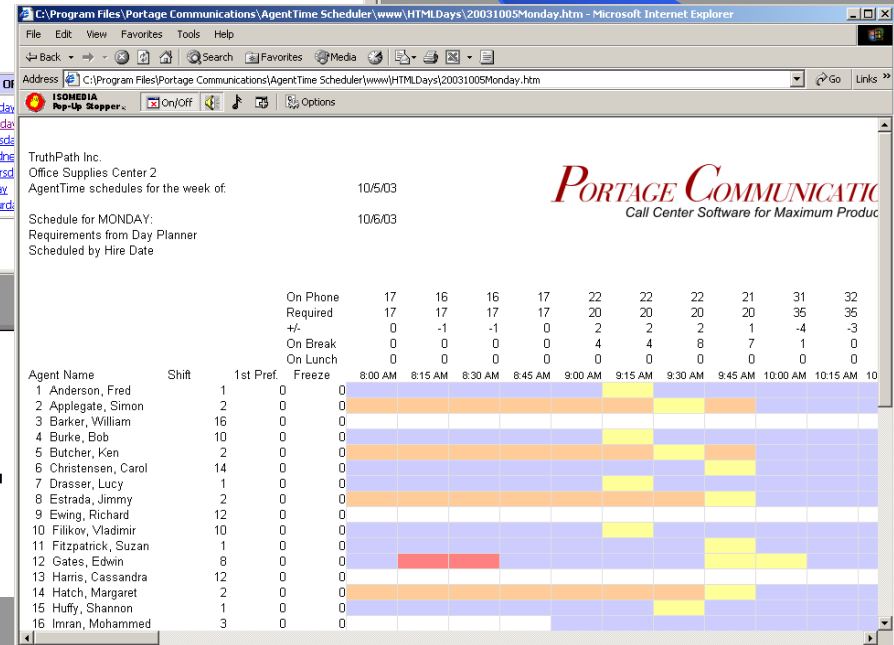


Week of:

AGENT
<a href="#">Anderson, Fred</a>
<a href="#">Applegate, Simon</a>
<a href="#">Barker, William</a>
<a href="#">Burke, Bob</a>
<a href="#">Butcher, Ken</a>
<a href="#">Christensen, Carol</a>
<a href="#">Drasser, Lucy</a>
<a href="#">Estrada, Jimmy</a>
<a href="#">Ewing, Richard</a>
<a href="#">Filkov, Vladimir</a>

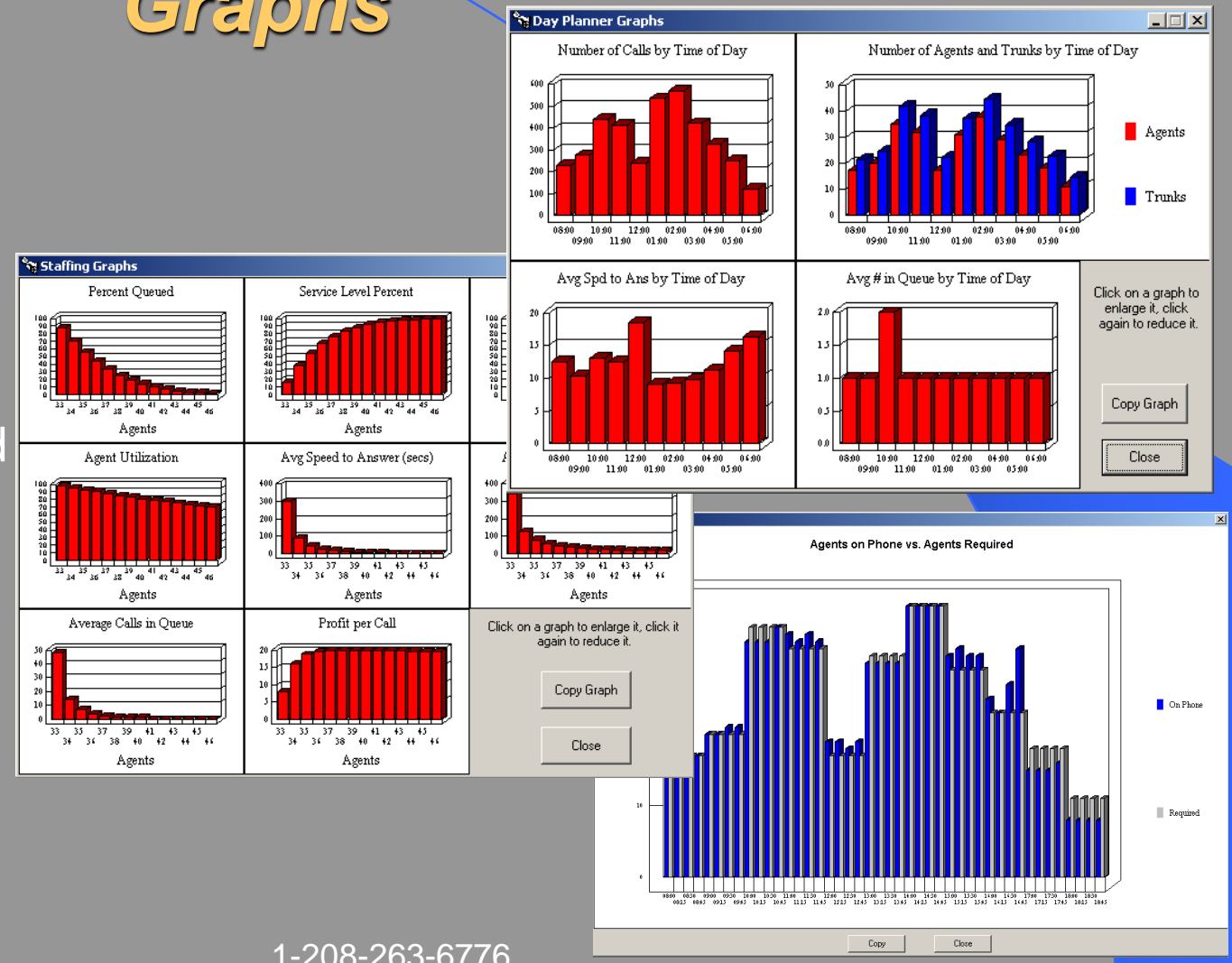
Portage Communications AgentTime Schedule for the Week of Sunday, January 27, 2002

		8:00 AM	8:15 AM	8:30 AM
Anderson, Fred	Monday, January 28, 2002	PPPP	PPPP	BBBB
	Wednesday, January 30, 2002	PPPP	PPPP	BBBB
	Thursday, January 31, 2002	PPPP	PPPP	BBBB
	Friday, February 01, 2002	PPPP	PPPP	BBBB



## Graphs

- Calculated data is also presented graphically.
- All data and graphs may be printed, or copied and pasted to spreadsheets and other applications for custom calculations and presentations.



1-208-263-6776

www.portagecommunications.com

## Financial Projection

- Financial data is calculated in *Day Planner* and *SimACD* based on expense and revenue factors in the call center.
- Projected revenues and profits or losses are calculated for each time period.
- Percentages for agent availability and attendance take shrinkage into account.

**Call Center Costs and Agent Utilization**

**Call Center Costs**

Agent Cost per Hour:

Inbound Line Cost per Hour:

Other Costs per Hour:

Revenue per Call:

Revenue per Minute:

**Agent Utilization**

Percent Available:  %

Percent Attendance:  %

Financials

Time	Agent Cost	Trunk Cost	Other Cost	Revenue	Profit	Profit/Call
08:00 AM	\$425.00	\$104.71	\$35.00	\$5,082.00	\$4,517.29	\$19.56
09:00 AM	\$500.00	\$123.40	\$35.00	\$6,050.00	\$5,391.60	\$19.61
10:00 AM	\$875.00	\$236.05	\$35.00	\$9,658.00	\$8,511.95	\$19.39
11:00 AM	\$800.00	\$213.55	\$35.00	\$9,108.00	\$8,059.45	\$19.47
12:00 PM	\$425.00	\$111.74	\$35.00	\$5,280.00	\$4,708.26	\$19.62
01:00 PM	\$775.00	\$205.13	\$35.00	\$11,770.00	\$10,754.87	\$20.10



## **Conclusion**

- **Affordable.** \$2,800.00 to \$6,400.00 depending on the number of agents to be scheduled.
- **Easy to use,** with a short learning curve.
- **Optimal scheduling** solution designed specifically for small to medium sized call centers.
- Advanced, and unrivaled **simulation** functionality.
- **Self contained** desktop solution, no integration costs.
- **Please contact us for an online demo:**

**208-263-6776**

**info@portagecommunications.com**

1-208-263-6776

www.portagecommunications.com

## *Terms and Support*

- Free telephone customer support and training help 9am to 5pm PT
- Free upgrades to new versions as they become available.
- No ongoing fees or subscription costs. The one time purchase is the only expense.
- The software can be installed on multiple managers' workstations as long as they are physically located at one call center.

1-208-263-6776

[www.portagecommunications.com](http://www.portagecommunications.com)