WxCC

Administrator Guide

WebEx Contact Centre

Administrator Training Guide

DATE: **20/05/20**

VERSION: **1.0**

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1. WebEx Contact Center Service Overview

What does WebEx Contact Center do?

For the Caller

- Call routing based on menu prompts and selections
- Call queuing and distribution

For the Agent

- Call management (hold, consult, conference and transfer)
- Make calls (outbound)
- Agent state management (available, break, meeting etc.)
- Personal statistics

For the System Administrators

- ACD administration
- Access control rights
- Agent provisioning

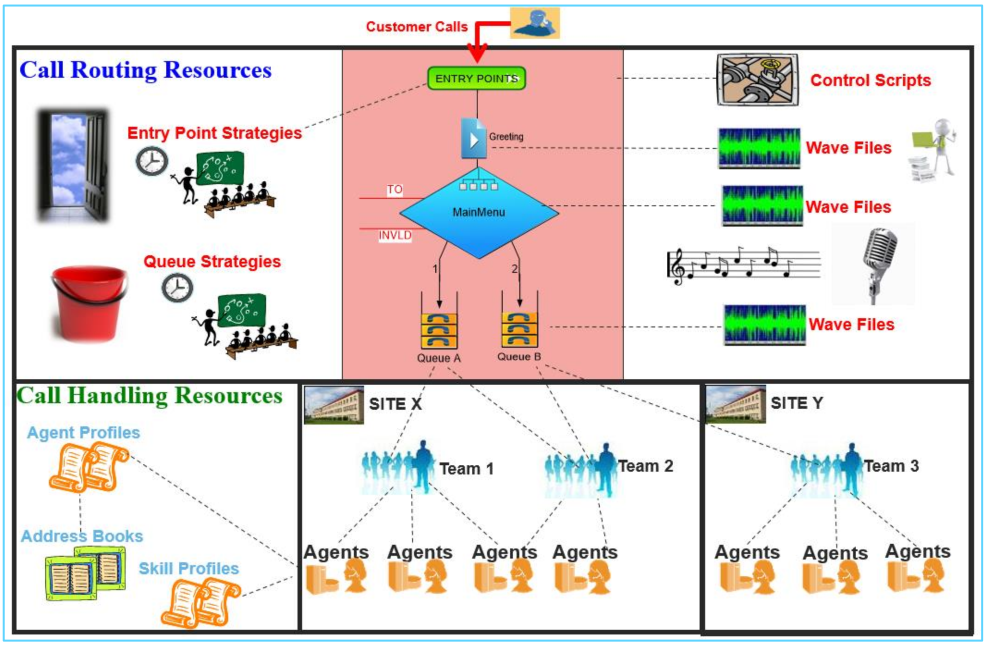
For the Management Team (including QA)

- Call monitoring
- Call recording
- Real-time reports
- Historical reports

1.1 Provisioning

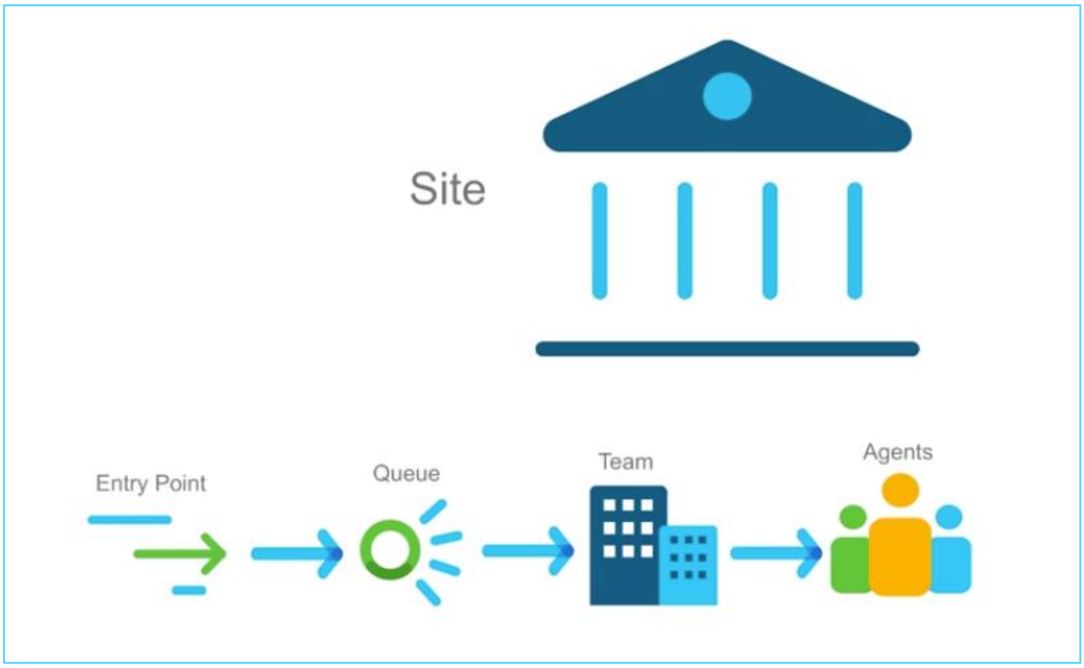
WebEx Contact Center Provisioning Framework

Below is a Top-Level diagram of the WebEx Contact Center Provisioning Framework



1.1.1 Basics

- An '**Entry Point**' is the initial landing place for a customer call
- A '**Queue**' is where active calls are stored before being connected to Teams and Agents
- A '**Team**' is a group of Agents at a specific site who handle calls
- An '**Agent**' is the person at the end of the call flow who handles calls
- A '**Site**' is a physical Contact Centre location under control of the Tenant
    - Teams are provisioned under Sites. Sites are not used for Routing Strategies, but they can be used to run specific reports
    - Every single inbound call will consist of at least one Entry Point and one Queue



1.2 Call Routing & Teams

Calls in queues are distributed to teams

- Calls in a specific queue can be routed to one or more teams
- The queue Routing Strategy determines the grouping, order, and timing of team distribution
- Calls can be distributed to agents in a team, based on 'longest available', 'skills-based', 'load-based' or 'priority-based'

Types of Team

Agent-based

- Is the most-commonly used type of team
- Composed of agents who select their team when logging in to the Agent Desktop
- When an agent is selected, a call is placed to the phone number he or she entered at the log in (or the phone number the administrator has specified in their user settings)
- An agent can only log into one team at a time

Capacity-based

- A different type of team

- Each capacity-based team has an associated phone number
- When a capacity-based team is selected, a call is placed to that phone number
- Calls in excess-of the specified capacity for the team will be queued

1.3 Call Handling & Management

For Call Handling and Management, Contact Center Administrators can handle the following:

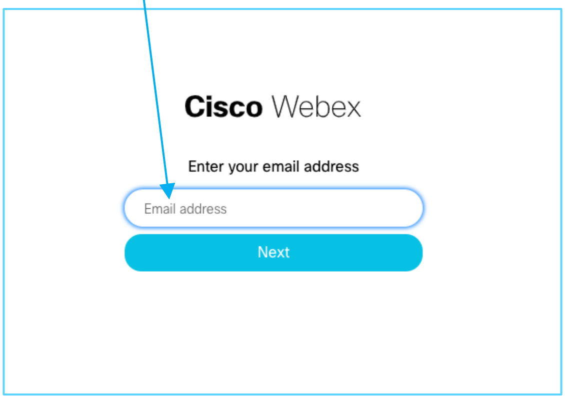
- Provisioning
- Call Recording, Recording Management & Monitoring
- Release Notes
- Reporting and Analytics
- Routing Strategies & Control Scripts
- Music & Message files (.WAV)

2. Management Portal Dashboard Training and Additional Features

2.1 Login

To Log in to the WxCC Management Portal, follow the link provided to your Organisation during the Onboarding process.

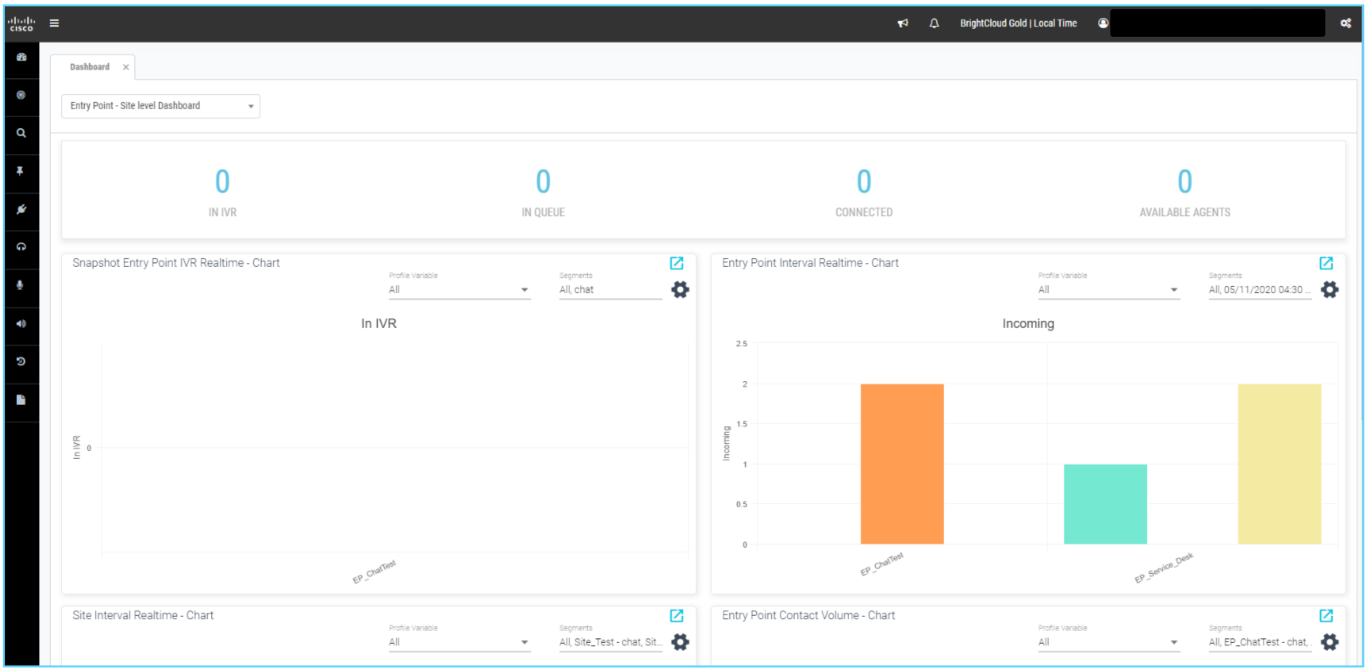
Enter your **Email address** that you set up when you followed the steps in the Cisco WebEx Teams provisioning email.

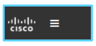


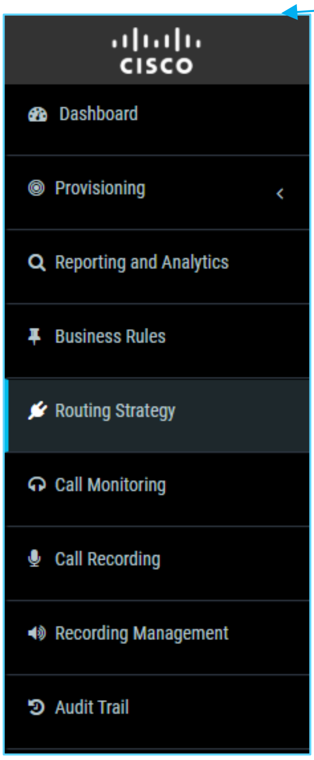
Enter the **Password** that you created when you followed the steps in the Cisco WebEx Teams provisioning email.

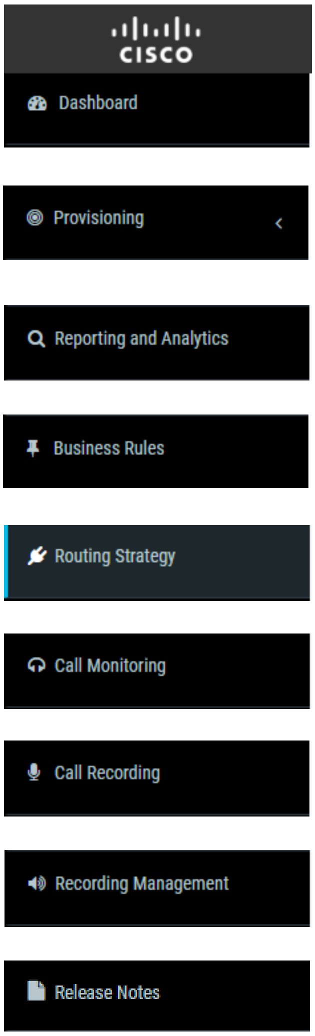
2.2 Management Portal Dashboard

Once you have logged in, the **Management Portal Dashboard** will appear as follows:



Click on the 3 bars to the right of the Cisco logo  and the **Management Portal <u>Navigation bar</u>** will appear.





- Dashboard allows you to toggle between: Entry Point – Site level Dashboard, Contact Center Overview Realtime or Contact Center Overview Historic to view the different Dashboard displays.
- The Provisioning tab allows you to manage Entry Points/Queues, Teams, Users, User Profiles, Work Types, Auxiliary Codes, Agent Profiles, Address Book, Outdial ANI, CAD Variables, Multimedia Profiles, Skills, Threshold Rules, Entry Point Mappings, Bulk Ops, Templates and Reports.
- Reporting and Analytics opens the Analyzer in a new browser tab
- The Business Rules is a feature that will soon be available in WxCC in an upcoming Cisco release
- Routing Strategy opens in a new browser tab. You can view and edit Routing Strategies, Global Routing Strategies, Team Capacity, Resources including Audio Files, Predefined Emails and Predefined Chat responses as well as Queue Precedence.
- Call Monitoring opens in a new browser tab. You can Set up Monitoring Schedules, Monitor Next Call, Mid-Call Monitor and Continuous Monitor.
- Call Recording opens in a new browser tab. You can view and edit any queue specific Recording Schedules.
- Recording Management opens in a new browser tab. You can search for recordings by filtering on specific information.
- Release Notes contain documents that describe recent enhancements, bug fixes and open issues relevant to the WebEx Contact Center. You should be authorized to access this module.

3. Provisioning

3.1 Entry Points/ Queues

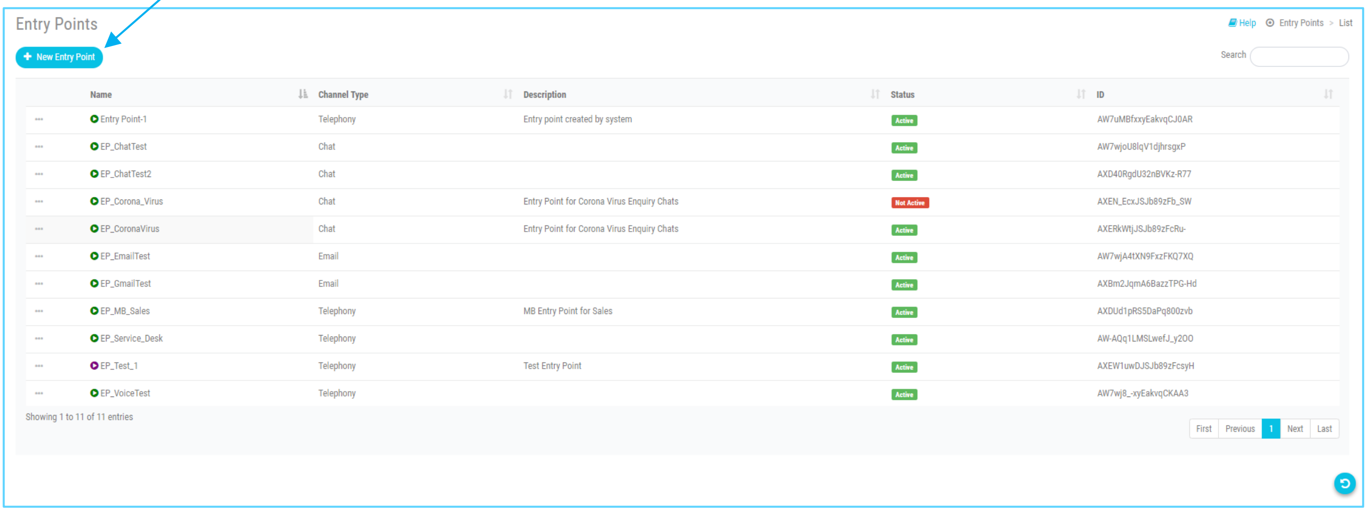
- Entry Points and Queues are types of virtual teams. A virtual team is a holding place for incoming customer requests.
- Use the WebEx Contact Center **Management Portal** to create entry points and queues. You can create entry points and queues depending on how the WebEx Contact Center administrator has configured your profile.
- An entry point is the initial landing place for customer chats, calls, or emails in the WebEx Contact Center system. For the customer calls, you can associate one or more toll-free or dial numbers with a given entry point. The system uses IVR call treatment for a call while it is in the entry point.
- **Outdial Entry Point** is a virtual team for Outdial calls.
- To use entry points for the telephony channel type, ensure that you do the following:
    - Map a dial number to the entry point.
    - Contact your WebEx Contact Center administrator for other **Provisioning** configurations.
- A queue is where the customer chats, calls, or emails wait before the system assigns them to any agent.
- **Outdial Queue** is a virtual team for Outdial calls.

Entry Points

From the WebEx Contact Center portal navigation bar, choose **Provisioning** and **Entry Point** or **Outdial Entry Point.**

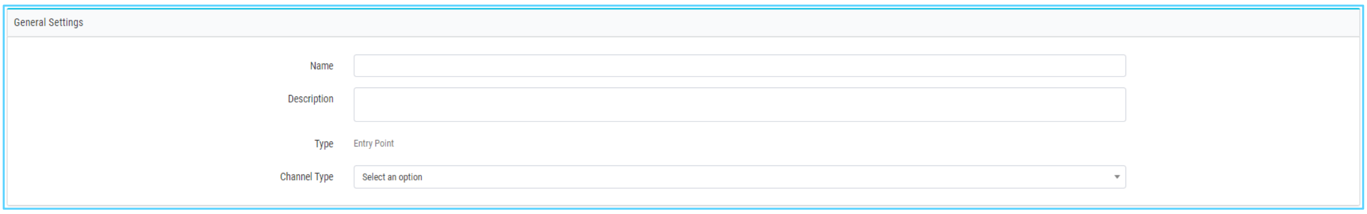
The Entry Point or Outdial Entry Point page appears. The page lists all the entry points, if any.

- Click the <u>**+ New Entry Point**</u> or <u>**+ New Outdial Entry Point**</u>.



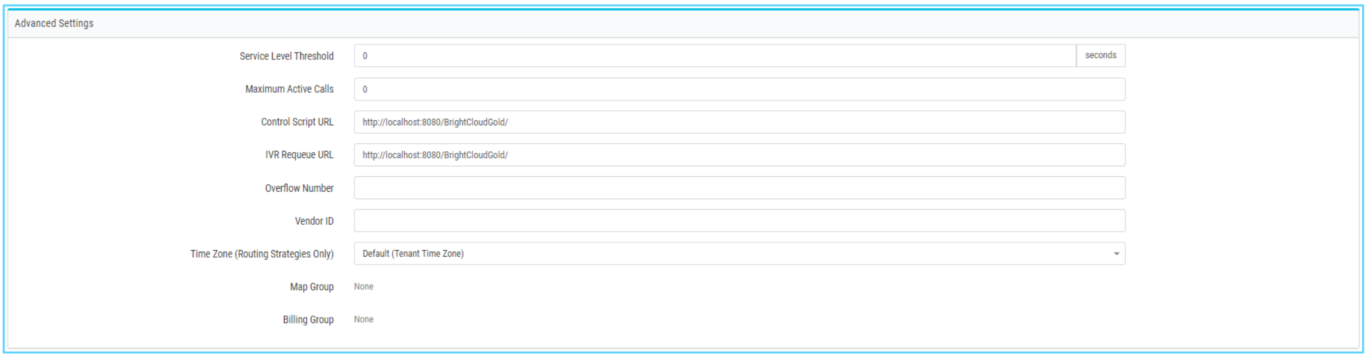
- You can copy an existing Entry Point or Queue by clicking the <u>**Three Dots**</u> next to the **Name** and  selecting **Copy**
- Enter the following settings for the entry point and click **Save**:
    - **Note**: There are some settings that you cannot edit.

General Settings:



- **Name:** The name for the entry point.
- **Description:** (Optional) A short description of the entry point.
- **Channel Type:** Select a channel type. Supported channel types are Telephony, Email, or Chat.
    - The default value for Outdial Entry Point is Telephony.
    - **Outdial Primary DID URL:** The full pathname of the DID .xml file that supports outbound dialing. The WebEx Contact Center administrator configures this field.
    - This setting is applicable only for Outdial Entry Point.
    - **Outdial Backup DID URL:** The full pathname of the backup DID .xml file. The WebEx Contact Center administrator configures this field.
    - This setting is applicable only for Outdial Entry Point.

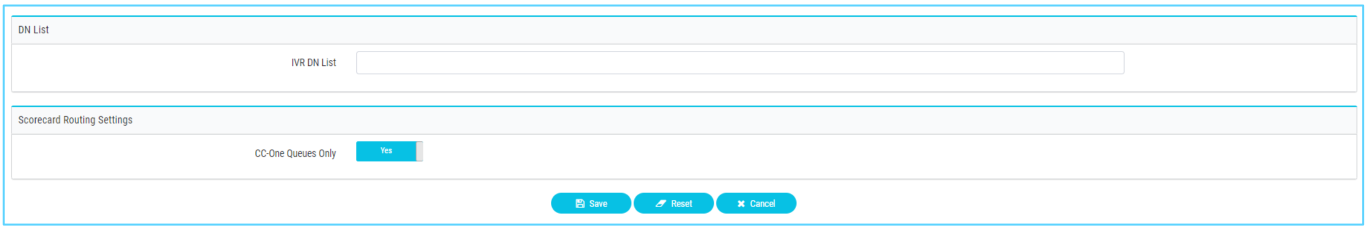
Advanced Settings



- **Service Level Threshold:** Enter the time that a customer request can be in a queue before the system flags it as outside the service level. If the agent completes a customer service request within this time interval, the system considers it within the service level.
- **Maximum Active Calls:** Enter the maximum number of simultaneous calls that you allow for this entry point. The system busies out any call that is beyond this number.
    - This setting is available for the Telephony channel type.
- **Maximum Active Chats:** Enter the maximum number of simultaneous chats that you allow for this entry point.
    - This setting is available for the Chat channel type.
- **Maximum Active Emails:** Enter the maximum number of simultaneous emails that you allow for this entry point.
    - This setting is available for the Email channel type.
- **Control Script URL:** The system automatically populates this field with the URL for this entry point or the default control script of the queue. It happens when you do not configure the control script using the WebEx Contact Center Routing Strategy module.
    - This setting is available for the Telephony channel type.
- **IVR Requeue URL:** Currently we do not support this setting.
- **Overflow Number:** Enter the destination phone number to which the system diverts the customer calls when they exceed the Maximum Time in Queue that you have set in the routing strategy.
    - This setting is applicable only for the Telephony channel type.
- **Vendor ID:** Enter the unique alphanumeric string that maps this entry point to the vendor.

- Currently we do not support this setting.

- **Time Zone:** (Routing Strategies Only) (Optional) BrightCloud will set this according to your Organisation's requirements.



DN List

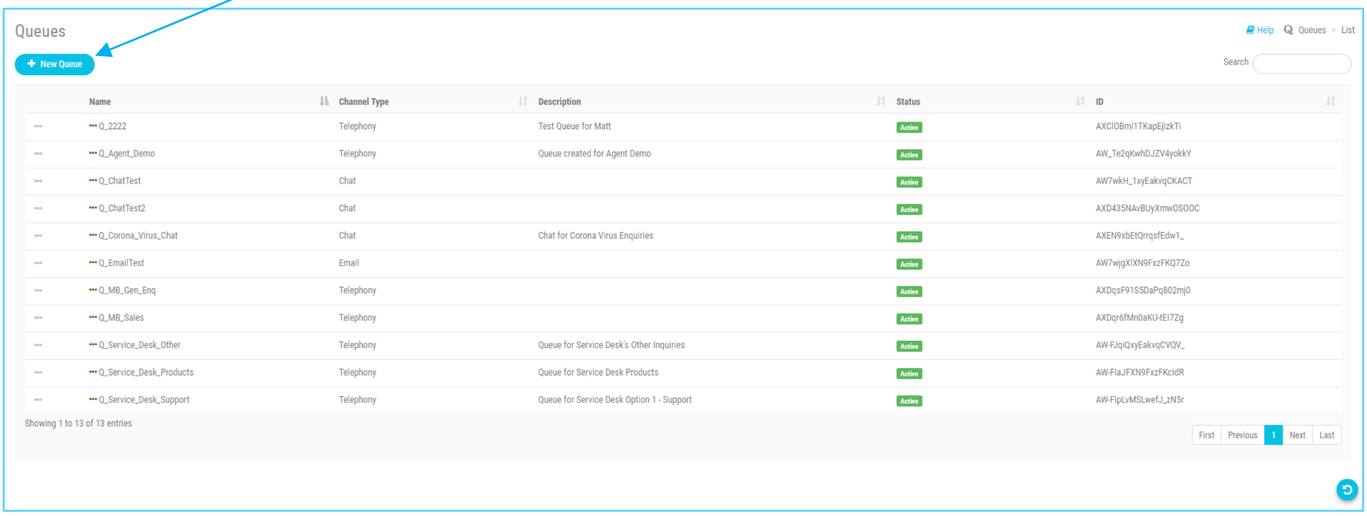
- **IVR DN List:** Enter the DN pool list numbers if you want to integrate this entry point with an external IVR.
    - This setting is available for the Telephony channel type.
- **Scorecard Routing Settings:** The setting is for Scorecard Routing.
    - This setting is applicable for the Telephony channel type in Entry Point.
    - Currently we do not support this setting.

Queues

In the WebEx Contact Center portal navigation bar, click **Provisioning**. Select **Queue** or **Outdial Queue**.

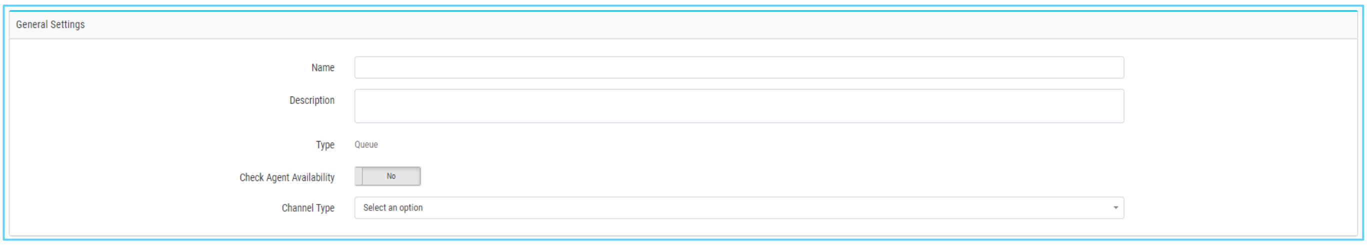
The **Queue** or **Outdial Queue** page appears. The page lists all the queues, if any.

- Click the **+ New Queue** or **+ New Outdial Queue**.



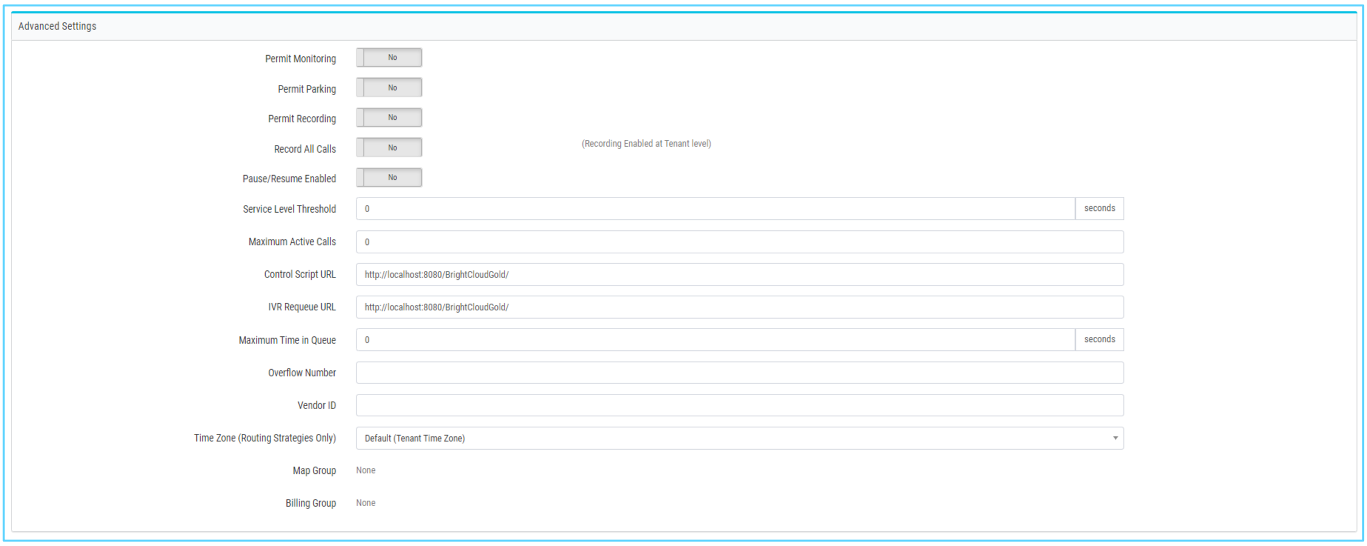
- Enter the following settings for the queue and click **Save.**

General Settings



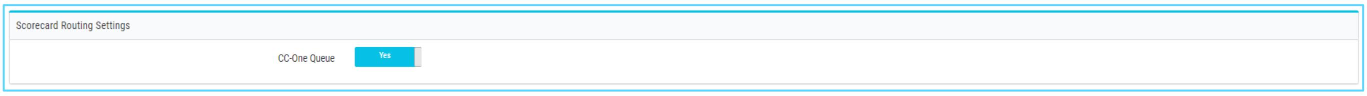
- **Name**: Enter the name for the queue.
- **Description**: (Optional) Enter a short description of the queue.
- **Type**: (Read-only) This read-only field displays whether the settings are for an entry point, a queue, an Outdial entry point, or an Outdial queue.
- **Check Agent Availability**: This setting specifies whether the system can exclude teams with no logged in agents for the relevant routing strategies. This setting is not available for Outdial Queues.
    - If you enable the Check Agent Availability feature in the Tenant settings, you cannot disable it from here.
- **Channel Type**: The channel type for the queue.
    - For Outdial entry points, the default channel type is Telephony.

Advanced Settings



- **Permit Monitoring**: Select **Yes** or **No** to specify whether you can monitor the calls.
    - This setting is available only for the Telephony channel type.
- **Permit Parking**: Select **Yes** or **No** to specify whether the system can queue the calls.
    - This setting is available only for the Telephony channel type.
- **Permit Recording**: Select **Yes** or **No** to specify whether the system can record the calls.
    - If you enable **Record All Calls** in the **Tenant** settings, you cannot disable **Permit Monitoring** from here.
    - This setting is available only for the Telephony channel type.
- **Record All Calls**: This setting is available only if you enable **Permit Recording**.
    - Select **Yes** or **No** to indicate whether the system can record all the calls for this queue.
    - If **Record All Calls** is enabled in the **Tenant** settings, you cannot disable this setting from here.
    - This setting is available only for the Telephony channel type.
- **Pause/Resume Enabled:** Select **Yes** or **No** to specify whether the agents can pause and resume a call recording. For example, the agent can pause call recording while discussing sensitive information from the customer, such as credit card details.
    - If you enable the **Pause/Resume Enabled** feature in the **Tenant** settings, the system overrides a **No** setting here. For more information, see **Tenant Settings**.
    - **Note**: Agents can use this feature, only if the **Privacy Shield** feature is enabled in the WebEx Contact Center service configuration, BrightCloud will set this according to your Organisation's requirements.
- **Recording Pause Duration**: This setting is available only if you set **Pause/Resume Enabled** to **Yes**.
    - This setting specifies the time in seconds, after which the recording resumes automatically.

  - This setting is available only for the Telephony channel type.
- **Service Level Threshold**: Enter the time that a customer request can be in a queue before the system flags it as outside the service level. If you complete a customer service request within this time interval, the system considers it within the service level.
- **Maximum Active Calls**: Enter the maximum number of simultaneous calls allowed for this queue. The system busies out any call that is beyond this number.
  - This setting is available only for the Telephony channel type.
- **Maximum Active Chats**: Enter the maximum number of simultaneous chats allowed for this queue.
  - This setting is available only for the **Chat** channel type.
- **Maximum Active Emails**: Enter the maximum number of simultaneous emails allowed for this queue.
  - This setting is available only for the **Email** channel type.
- **Control Script URL**: The URL for the queue or the default control script of the queue. If you do not use the routing strategy module to configure the control script, the system automatically populates the URL.
  - This setting is available only for the Telephony channel type.
- **IVR Requeue URL**: Currently we do not support this setting.
  - This setting is available only for the Telephony channel type.
- **Maximum Time in Queue**: Enter the time after which the system distributes the queued customer request to the overflow number that you provision for this queue. The value that you enter is the default value for the **Maximum Time in Queue** field in the routing strategy for this queue. If you enter different value while defining the routing strategy using this queue, the systems ignores this value.
  - For an email queue, enter high value to avoid overflow.
- **Overflow Number**: Enter the destination phone number to which the system distributes the customer calls when they exceed the **Maximum Time in Queue** that you have set in the routing strategy.
  - This setting is applicable only for the Telephony channel type.
- **Vendor ID**: Enter the unique alphanumeric string that maps this queue to the vendor.
  - This setting is available only for the Telephony channel type.
  - Currently we do not support this setting.
- **Time Zone**: (**Routing Strategies** only) (Optional) If **Multiple Time Zone** is enabled, you can select the time zone of the queue. BrightCloud will set this according to your Organisation's requirements. Any routing strategy for this queue uses the time zone that you select here.



- **Scorecard Routing Settings**: The setting for **Scorecard Routing**.
  - This setting is available only for the Telephony channel type.
  - Currently we do not support this setting.

Deactivate an Entry Point or a Queue

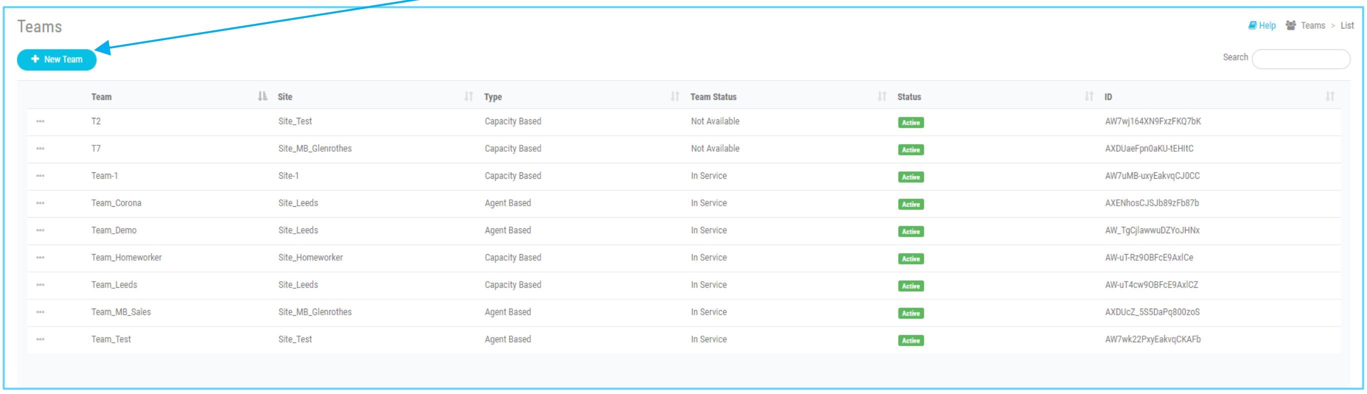
- You cannot deactivate an entry point or queue if you associate it with any other entities such as, dial numbers or any other routing strategy. When you try to deactivate such entry points or queues, you get an error message. Click the **Information icon** at the end of the message to view the list of all the associated entities.
- After you deactivate an entry point or queue, you can still see it in the **Entry Points/Queues** page as **Not Active**. Historical reports also display details of the deactivated entry points or queues.
- In the **Entry Points/Queues** page, you can click the **Three Dots** and then the restore icon to reactivate an entry point or queue.
- From the WebEx Contact Center Portal navigation bar, choose **Provisioning**.
- Choose **Entry Points/Queues** and then select the type of entry point or queue you want to deactivate.

- The page for the type of entry point or queue page appears. The page displays the list of existing entry points or queues.
- Click the **Three Dots**  to the left of an entry point or queue and click **Delete**.
- The **Heads Up!** dialog box appears. Click **Yes** to confirm.

3.2 Teams

From the WebEx Contact Center Portal navigation bar, choose **Provisioning**. Choose **Teams**.

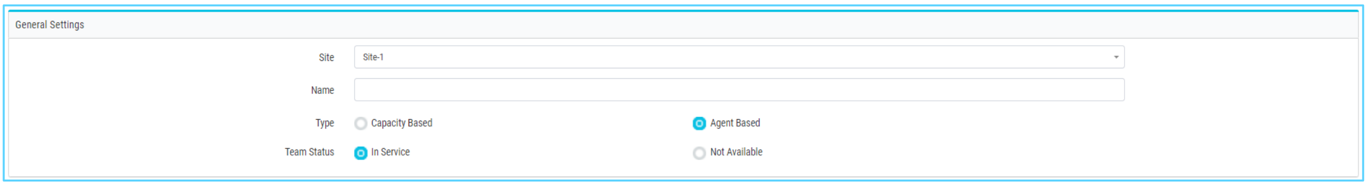
The Teams page appears. This page displays a list of teams. Click **+ New Team**.



	Team	Site	Type	Team Status	Status	ID
•••	T2	Site_Test	Capacity Based	Not Available	Active	AW7wj164XN9FxzFKQ7bK
•••	T7	Site_MB_Glenrothes	Capacity Based	Not Available	Active	AXDUaeFpn0aKU-tEHItC
•••	Team-1	Site-1	Capacity Based	In Service	Active	AW7uMB-uxyEakvqCJ0CC
•••	Team_Corona	Site_Leeds	Agent Based	In Service	Active	AXENhosCJSJb89zFb87b
•••	Team_Demo	Site_Leeds	Agent Based	In Service	Active	AW_TgCjlawwuDZYoJHNx
•••	Team_Homeworker	Site_Homeworker	Capacity Based	In Service	Active	AW-uT-Rz9OBFcE9AxlCe
•••	Team_Leeds	Site_Leeds	Capacity Based	In Service	Active	AW-uT4cw9OBFcE9AxlCZ
•••	Team_MB_Sales	Site_MB_Glenrothes	Agent Based	In Service	Active	AXDUcZ_5S5DaPq800zoS
•••	Team_Test	Site_Test	Agent Based	In Service	Active	AW7wk22PxyEakvqCKAFb

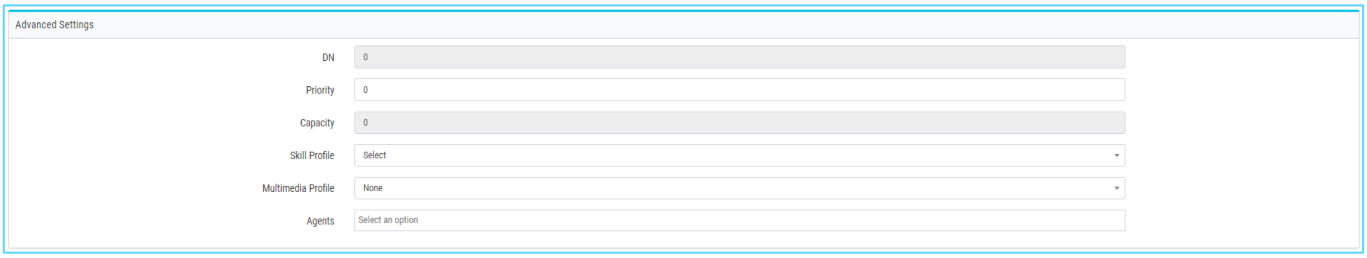
Enter the following details and click **Save**.

General Settings



- **Site**: Select the site from the drop-down. You cannot edit the site later.
- **Name**: Enter the name for the team. Generally, use names that indicate the function of the team, such as **Billing** or **Customer Support**.
- **Type**: Choose the team type from the following:
- **Agent Based**: You assign a specific number of agents to the team.
- **Capacity Based**: You do not assign any specific number of agents to the team. You use capacity-based teams for voice mailboxes or agent groups that are not managed by the WebEx Contact Center system.
  - The capacity setting determines the capacity of such teams. But the team capacity strategy in the Routing Strategy module overwrites the capacity setting.
- **Team Status**: Select the status of the team to indicate whether the team is available to handle customer contacts. You cannot change the team status if the team is part of any routing strategy.
- **Status**: This setting appears on the Edit page to specify whether the team is **Active** or **Not Active**.

Advanced Settings



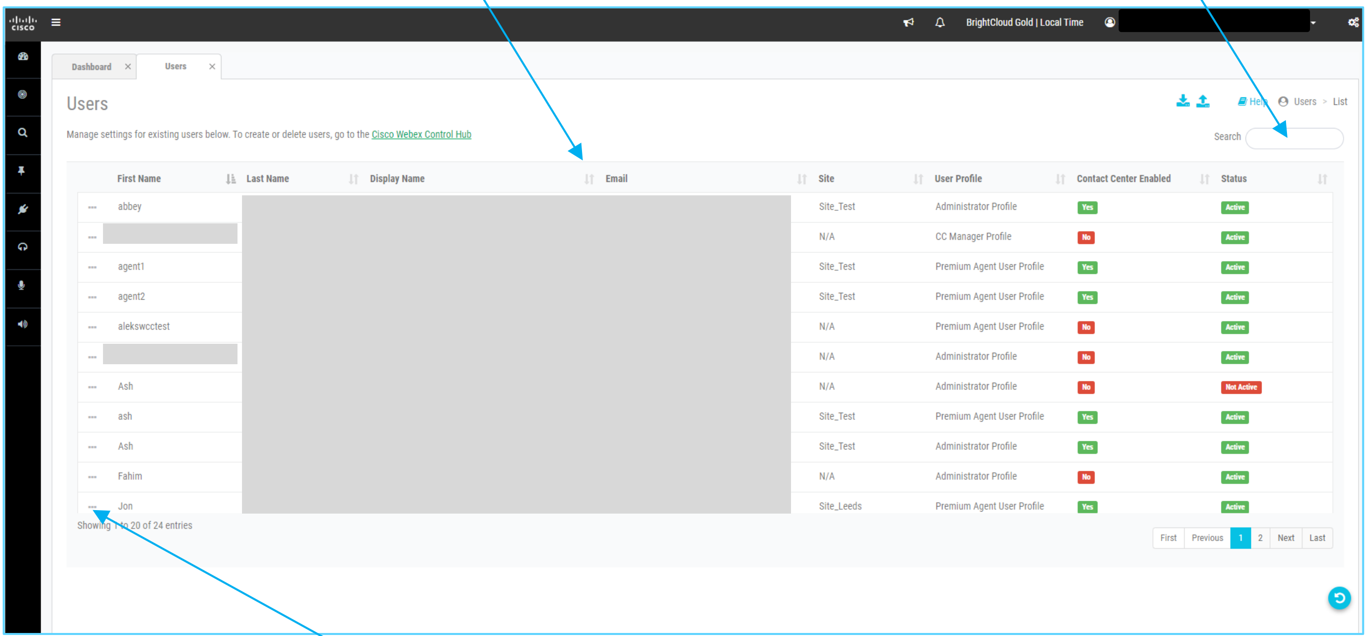
- **DN**: Enter the dial number where the system distributes the calls for this team. This setting is applicable only for capacity-based teams.
- **Priority**: The priority of the team. Currently we do not support this feature.
- **Capacity**: Enter the maximum number of simultaneous contacts that this team can handle. The system routes any contacts beyond this number as per the routing strategy. And, if there are no routing strategies, then the system queues the contacts.
    - This setting is applicable only for capacity-based teams.
    - You can create scheduled team capacity strategies to override this setting for dynamic contact center conditions. If you do not create any team capacity strategy for a capacity-based team, the system uses this capacity value.
- **Skill Profile**: (Optional) If your enterprise uses the optional **Skills-Based Routing** feature, you can select a skill profile for this team. For more information, see **Skill Profiles**.
    - You cannot assign a skill profile to a capacity-based team.
- **Multimedia Profile**: (Optional) If **Multimedia** is enabled, you can select a multimedia profile for this team. BrightCloud will set this according to your Organisation's requirements. For more information, see **Multimedia Profiles**. This profile overrides the multimedia profile that you assign to the site of this team.
    - You cannot assign a multimedia profile to a capacity-based team.
- **Agents**: Assign agents to the team from the drop-down list. You can only assign the agents that your organization administrator provisions for your enterprise.
    - This setting is applicable only for agent-based teams.

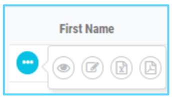
- To edit a team, click the **Three Dots** beside the team you want to edit and click **Edit** 
- To deactivate a team, click the **Three Dots** beside the team you want to edit and click **Delete** 
- The **Heads Up!** dialog box appears. Click **Yes** to confirm.
- The status of the team changes to **Not Active**.
- In the **Teams** page, you can click the **Three Dots** and then the restore icon to reactivate a team.

3.3 Users

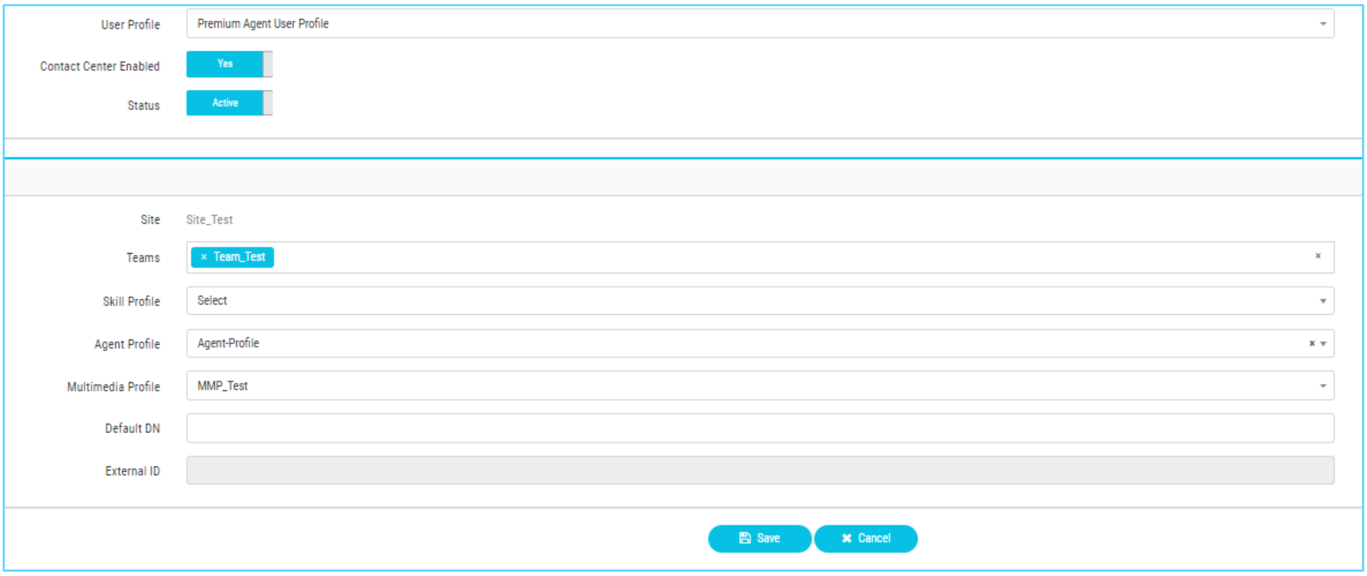
Users tab will open within the **Management Portal**. You can search for users by typing in the **Search bar**.

You can also filter users by the **Field headers.**





- To edit the User, click on the **Three Dots** next to their first name.
- The options are to **View**, **Edit**, **Export in Excel** and **Export as PDF**.
- To Make changes, select **Edit**, the below settings page will appear:



You can:

- Fill in **User** and **Work Location** information
- Assign **User Profile** by clicking the drop – down menu

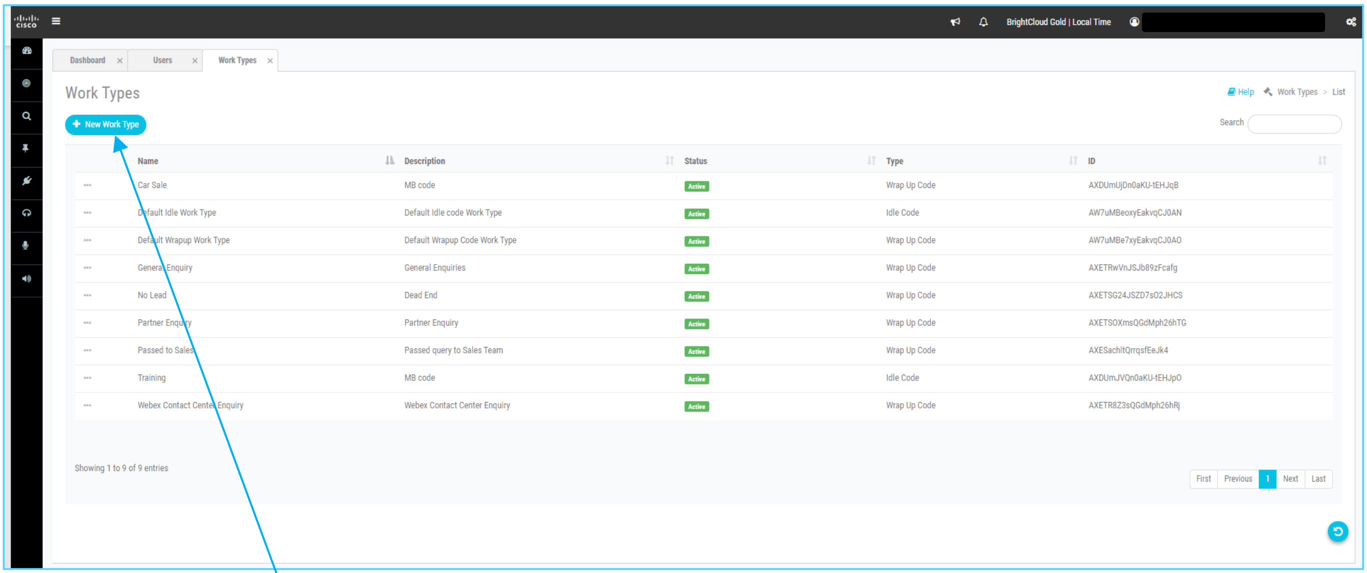
- Choose whether they can use the Agent Desktop by using the **Yes/No** toggle next to **Contact Center Enabled**
- Assign a user's **Team**
- Select a **Skill Profile**
- Select an **Agent Profile**
- Select a **Multimedia Profile**
- Assign a **Default DN** if you only want the user to use a certain number to make and receive call
- Click **Save** to keep the settings you have made or **Cancel** to dismiss them.

3.4 Work Types

Work Types are used to group Idle and Wrap-Up codes in Auxiliary Reports.

From the WebEx Contact Center Portal navigation bar, choose **Provisioning** and then **Work Types**.

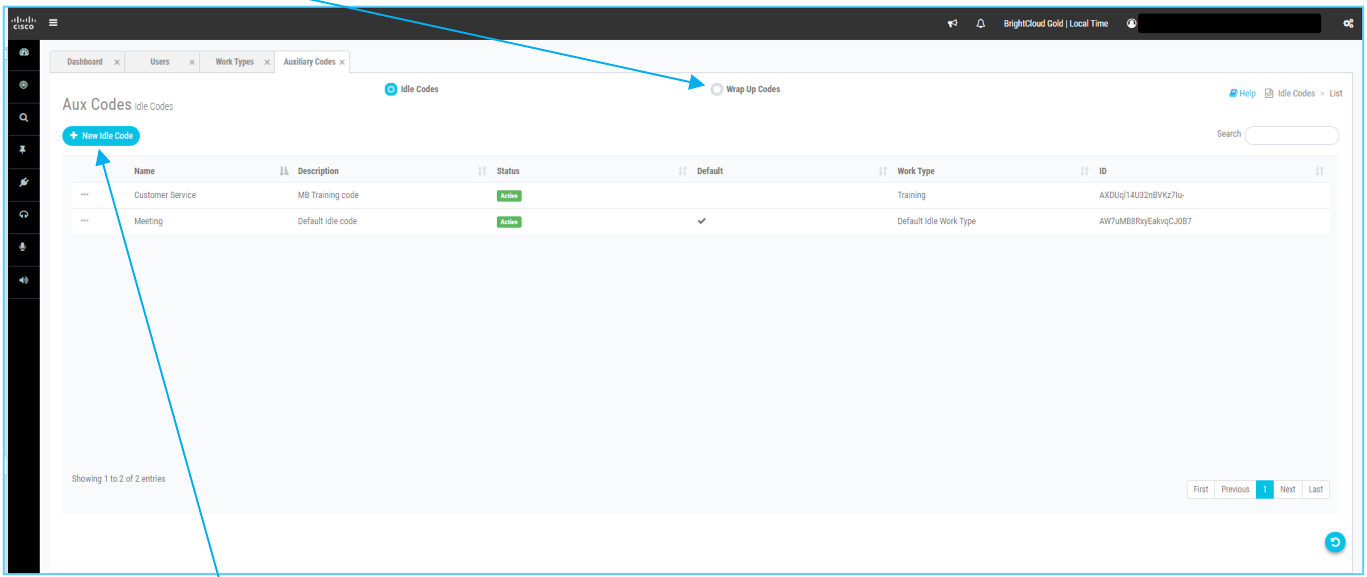
The Work Types page appears. This page displays a list of work types.



- Click <u>+ New Work Type</u>.
- The Work Type page appears.
- Enter the following details and click **Save**:
  - **Name**: Enter a name for the work type.
  - **Description**: (Optional) Enter a description of the work type.
  - **Type**: Specify the type of auxiliary code you can associate the work type with.

3.5 Auxiliary Codes

From the WebEx Contact Center Portal navigation bar, choose **Provisioning** and then **Auxiliary Codes**.
The Aux Codes page appears. By default, the system displays the Idle Codes. To view the list of wrap-up codes, select **Wrap Up Codes** at the top of the page.

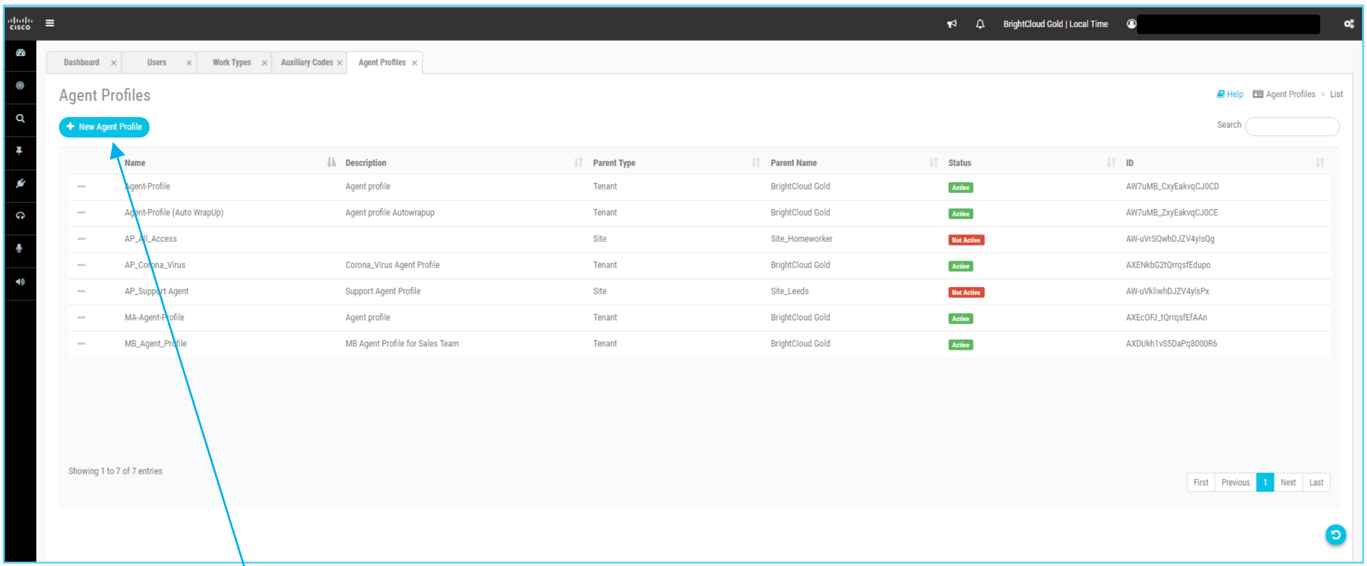


- Click **+ New Idle Code** or **+ New Wrap Up Code**.
  The **Aux Codes Idle Codes** or **Aux Codes Wrap Up Codes** page appears.
- Enter the following details and click **Save**:
  - **Name**: Enter the code name
  - **Description**: (Optional) Enter a description of the code.
  - **Is Default**: Select **Yes** or **No** to indicate whether this is the default code.
- If this is the first idle or wrap-up code for your organization, you must make it the default. You can modify it later after you create more codes.
- When you make a code default, the system overrides the existing default code. At one point, there can be only one default code each for Idle and Wrap Up.
- You must assign the default idle and wrap-up codes in agent profiles.
  - The default wrap-up code is used when the agent's profile specifies Auto Wrap Up. Such agents do not enter wrap-up codes. Instead, they automatically go into the Available state after completing an incoming call and automatically go into the Idle state after making an Outdial call.
  - The default idle code is used when the agent initially logs in and after the agent makes an Outdial call if the agent's profile specifies Auto Wrap Up.
- **Work Type**: Select the work type you want to associate with this code.
- On the Idle Codes or Wrap Up Codes List page:
  - To add a new code, click **New Idle Code** or **New Wrap Up Code**.
  - To edit the settings for a code, click the **Three Dots** to the left of a listed code and select **Edit**.
  - To delete a code, click the **Three Dots** to the left of a listed code and select **Delete**. Then, in the confirmation dialog box, click **OK**.

3.6 Agent Profiles

An Agent Profile is a group of permissions and Agent Desktop behaviours that you assign to specific agents. Each agent profile specifies the following permissions and settings:

- Queue Transfer
- Agent Consult and Transfer
- Wrap Up and Idle Codes
- Wrap-up timeout values
- Agent auto available
- Dialing capabilities
- Dial number capabilities
- Access to the agent personal statistics



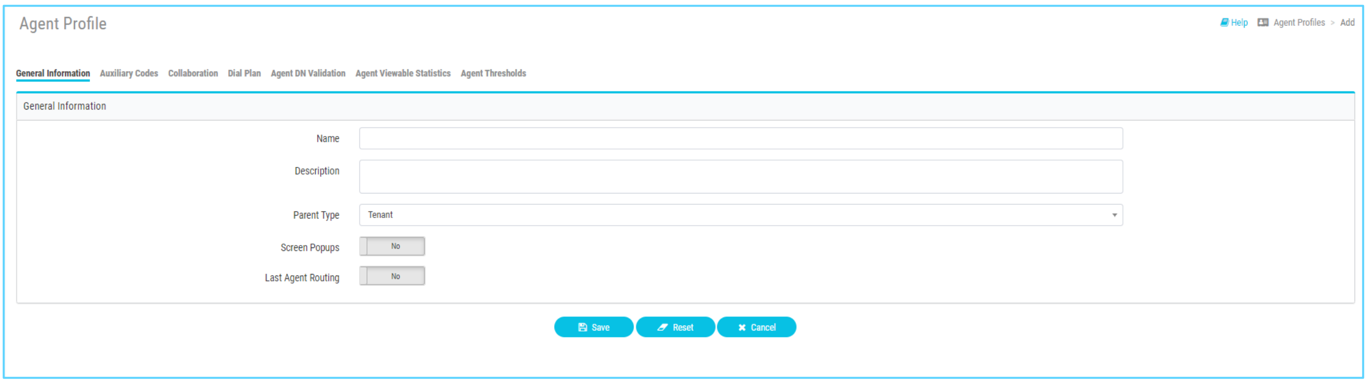
Create an Agent Profile:

From the WebEx Contact Center Portal navigation bar, choose **Provisioning** and then **Agent Profiles**.

The Agent Profiles page appears. This page displays a list of agent profiles.

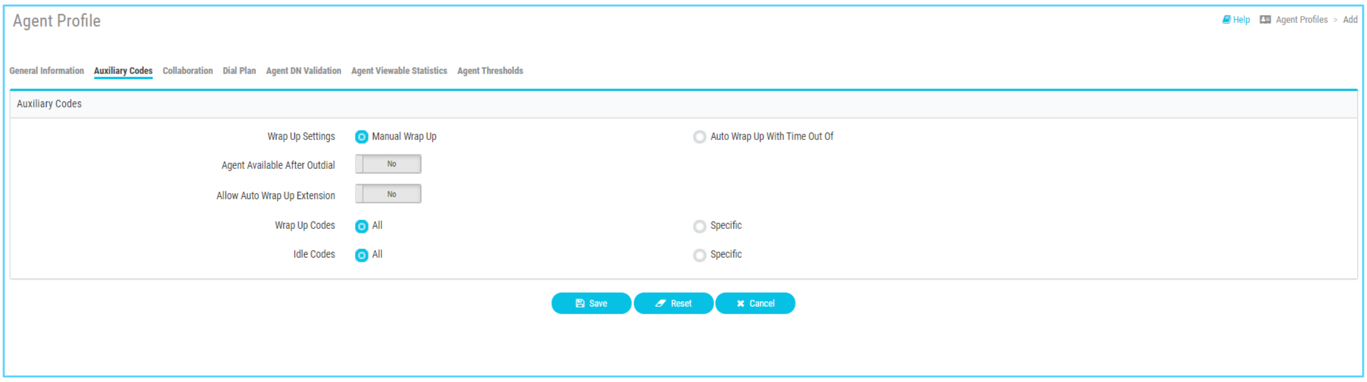
- Click the **+ New Agent Profile** and enter the following settings:

General Information:



- **Name**: Enter a name for the agent profile. The system appends the words 'copy_of' before the name of the original agent profile. You can keep the same name or edit it as per your requirement.
- **Description**: (Optional) Enter a description of the profile.
- **Status**: This setting appears only on the Edit page to indicate whether the profile is active or not.
- **Active**: You can assign the profile to an agent.
- **Not Active**: You cannot assign the profile to an agent.
- **Parent Type**: Select a parent type:
    - **Tenant**: The agent profile is available to all sites at your enterprise.
    - **Site**: The agent profile is available to a specific site.
- **Parent Name**: This setting is available if you choose Parent Type as Site. Select the site for which this agent profile is available.
- **Screen Popups**: Select **Yes** or **No** to specify whether you want to allow external pop-up screens.
- **Last Agent Routing**: This setting appears only if your administrator enables the Last Agent Routing feature for your enterprise.
    - Select **Yes** or **No** to specify whether to display the Last Agent Routing check box on the Agent Desktop during wrap-up.
    - When an agent selects this checkbox during wrap-up, the system routes the calls to them the next time the customer calls for the same issue.

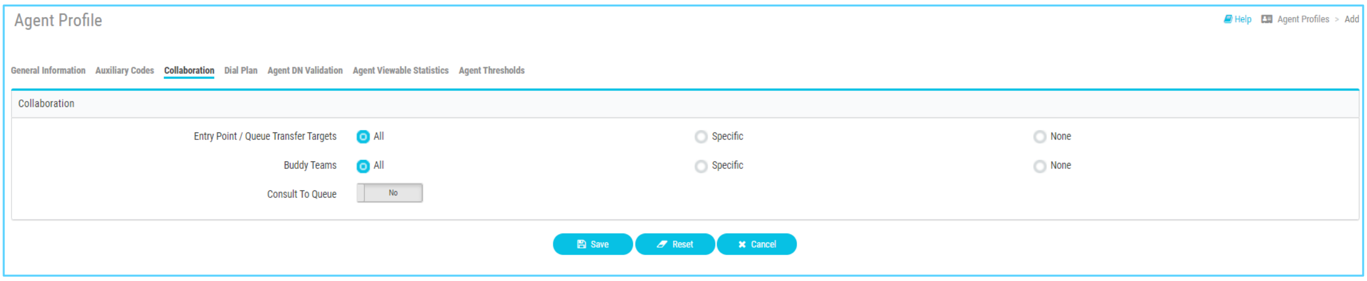
Auxiliary Codes:



- **Wrap Up Settings**: When you select **Auto Wrap Up with Time Out Of** and enter the time, the system automatically enters the default wrap-up code after an agent completes a conversation. The agent, however, can select a different code within the time-period that you specify here.
    - Select **Manual Wrap Up** if you want the agent to select a wrap-up code after completing a call.
    - No timeout is associated with manual wrap-up.
- **Agent Available After Outdial**: Select **Yes** if you want the agent to go into the **Available** state after completing and wrapping up an Outdial call.
    - The agent can also manually select an Idle state from the **STATUS NOW** drop-down list before selecting a wrap-up code.
    - Select **No** if you want the agent to go into the Idle state after completing and wrapping up an Outdial call.
- **Allow Auto Wrap Up Extension**: Select **Yes** if you want agents to cancel the auto wrap-up time and extend the wrap-up time.
    - When this option set to Yes, the system displays the **Cancel Auto Wrap Up** option when the agent is in auto wrap-up mode.
- **Wrap Up Codes**: Specify the wrap-up codes that the agents can select when they wrap up a contact:
    - Select **All** to make all wrap-up codes available.
    - Select **Specific** to make specific codes available; then select **Codes** from the drop-down list. To remove a code, click **X** on the left side of the listed code name.

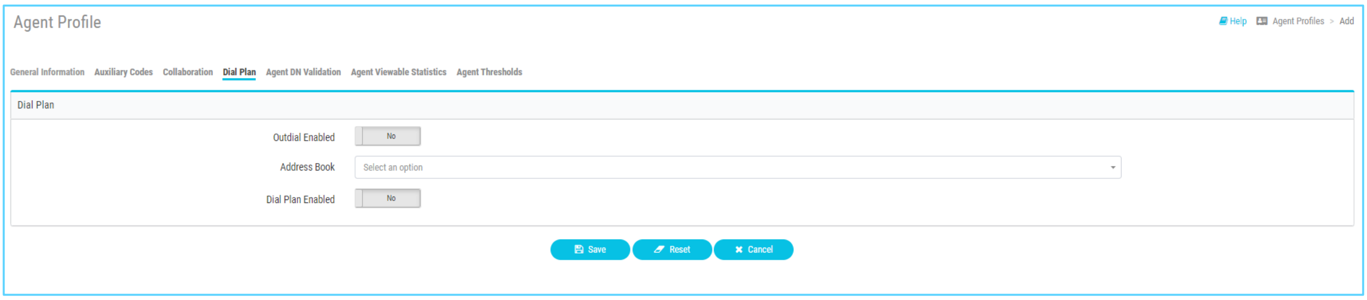
    - You must add the default wrap-up code in the **Selected Codes** list. The system uses the default code when you have enabled **Auto Wrap Up** in the profile of the agent. Such agents do not enter wrap-up codes.
- **Idle Codes**: Specify the Idle codes that the agents can select in **Agent Desktop**:
    - Select **All** to make all idle codes available.
    - Select **Specific** to make specific codes available; then select **Codes** from the drop-down list. To remove a code, click **X** on the left side of the listed code name.
- You must add the default idle code in the **Selected** list. The system uses default codes in the following scenarios:
    - When the agent initially logs in.
    - After the agent makes an Outdial call if you have enabled **Auto Wrap Up** in the profile of the agent.

Collaboration:



- **Entry Point/Queue Transfer Targets**: Specify the entry points or queues that the agents can select from the **Queue drop-down list** on the **Agent Desktop**:
    - Select **All** to make all entry points and queues available.
    - Select **Specific** to make specific entry points and queues available; then select **Entry Points and Queues** from the drop-down list.
    - Select **None** if you do not want to make any entry points or queues available as transfer targets.
- **Buddy Teams**: Specify the teams that the agents can select from the Agent drop-down list on the **Agent Desktop**. Agents can consult with, conference with, and transfer calls to the agents from the teams that they select.
    - Select **All** to make the agents on all teams available.
    - Select **Specific** to make agents on specific teams available; then select **Teams** from the drop-down.
    - Select **None** if you do not want to make any teams available for consultation, conference, or call transfer.
- **Consult to Queue**: Select **Yes** if you want the agent to be able to select a queue in the Queue drop-down as a target for a consultation. The target must be an inbound WebEx Contact Center queue.
    - If the agent selects an entry point as the target, the system disables the **Consult** button.
    - The system supports **Consult to Queue** only for queues that have teams serving them. If the agent attempts to consult to a queue that only redirects to another entry point or queue, the system displays a **Consult Failed** message.

Dial Plan:

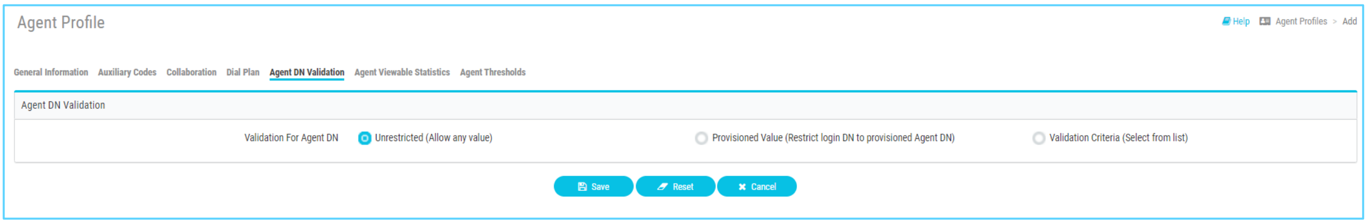


- **Outdial Enabled:**
  - If you want the agent to be able to make Outdial calls, select **Yes**.
  - If you do not want the agent to make Outdial calls, select **No**. This setting prevents the Dialpad from appearing on the **Agent Desktop**.

Note: To display the Dialpad, you must have an appropriate setup. Contact your administrator for the setup.

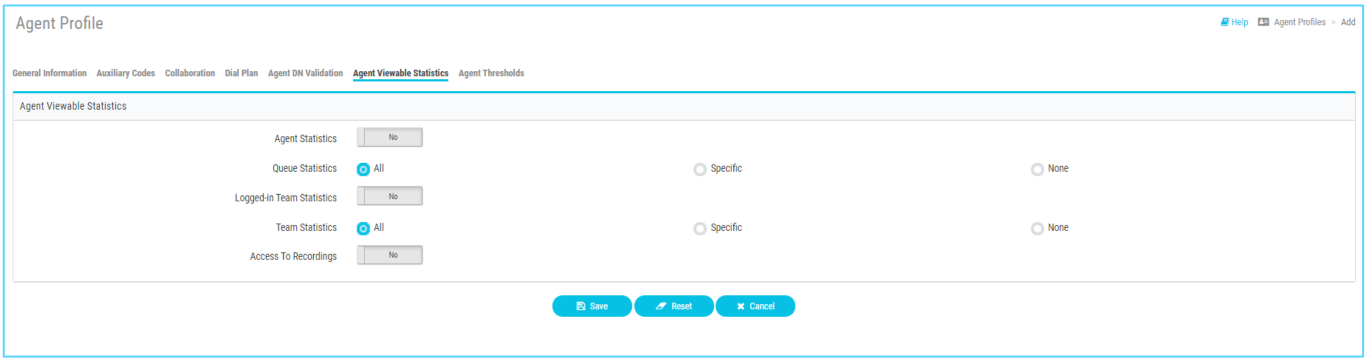
- **Outdial Entry Points**: If you set **Outdial Enabled** to **Yes**, select the Outdial entry point that the agent can use to make Outdial calls.
- **Address Book**: Select the address book that includes the speed-dial numbers that the agent can select to make Outdial and consult calls.
  - If you set **Outdial Enabled** to **No** and you select an address book, the agent can select a name from the address book for consults and transfers but cannot make Outdial calls.
  - Select **None** if you do not want to make an address book available to the agent.
- Dial Plan Enabled:
  - If you want the agent to be able to make ad-hoc Outdial calls, select **Yes**.
  - If you specify **No**, the agent cannot make ad-hoc Outdial calls. However, if you set **Outdial Enabled** to **Yes**, the agent can make an Outdial call, but only by either selecting an entry from the address book or typing a name from the address book in the **Start a new call** field on the Dialpad.
- Select **Dial Plan**:
  - This setting appears only if you set **Dial Plan Enabled** to **Yes**. Select the dial plans that determine the inputs that the system accepts in the Start a new call field. Two system-supplied dial plans are available. Your administrator can also create other dial plans for your enterprise. The included dial plans are:
  - **US** accepts input text such as the following: 18005551234, 1-800-555-1234, 1 (800) 555-1234
  - **Any Format** accepts any sequence of alphanumeric characters, hyphens, parentheses, and spaces, plus, non-sequential, underscores, and periods. The input cannot begin with an underscore or period. The system strips hyphens, spaces, and parentheses, but not the periods and underscores. You can use this format for any phone number as well as for the first part of an e-mail address or SIP URI. For example: (011X) xxx xxxx, 0500 xxxxx, 0800-1111, 17070, 1470, 999
- **Outdial ANI**: This setting appears only if you set **Outdial Enabled** to **Yes**. Optionally, select the list of phone numbers that the agent can select before making an Outdial call. The system uses the number that you select as the caller ID for the call.

Agent DN Validation:



- **Validation for Agent DN:** Select **Unrestricted** to allow agents to use any DN to log in to the **Agent Desktop**.
- To restrict the DN that the agent can enter, select one of the following:
  - **Provisioned Value** restricts the login DN to the default value that you provision for the agent. Note: If you do not provision any DN value, the agent can enter any DN value.
  - Validation Criteria restricts the login DN to the format specified in the **Validation Criteria** setting.
- **Validation Criteria**: This setting appears only if you select **Validation Criteria** in the **Validation for Agent DN**. Select the formats for the DN:
  - Select **All** to restrict the DN to all available formats.
  - Select **Specific** and then select formats from the Select **Validation Criteria** drop-down.

Agent Viewable Statistics:



- **Agent Statistics**: Select **Yes** or **No** to specify whether you want the agents to view their personal statistics in **Agent Desktop**.
- **Queue Statistics**: This setting controls whether the agent can display statistics for all or some queues in the Agent Personal Statistics tab. Do one of the following:
  - Select **All** to enable the agent to display statistics for all queues.
  - Select **Specific** and then the queues from the Select **Queues** drop-down to enable the agent to display statistics for specific queues.
  - Select **None** to prevent the agent from displaying queue statistics.
- **Logged-in Team Statistics**: Select **Yes** or **No** to specify whether the agent can view statistics for their team.

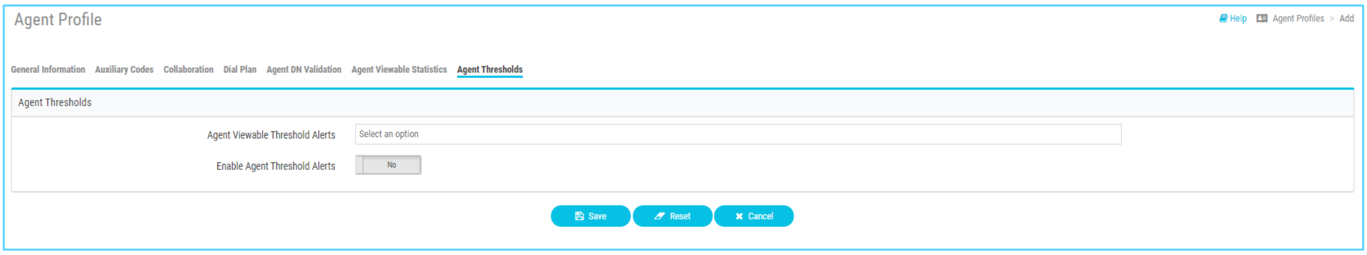
Note: Settings for **Logged-in Team Statistics** and **Team Statistics** are independent of each other.

Team Statistics: This setting controls whether the agent can display statistics for all or some teams in the **Agent Personal Statistics** tab. Do one of the following:

- Select **All** to enable the agent to display statistics for all teams.
- Select **Specific** and then the teams from the Select **Teams** drop-down to enable the agent to display statistics for specific teams.
- Select **None** to prevent the agent from displaying team statistics.

- **Access to Recordings**: This setting appears only if your enterprise uses the **Agent Access to Recordings** feature. Select **Yes** or **No** to specify whether the agent can access recordings of calls that they have handled in the last 24 hours.

Agent Thresholds:



The **Agent Thresholds** page appears only if your enterprise uses the **Threshold Alerts feature**. This page provides settings for specifying which, if any, agent-viewable alerts the agent can display in the Agent Personal Statistics tab on the **Agent Desktop**.

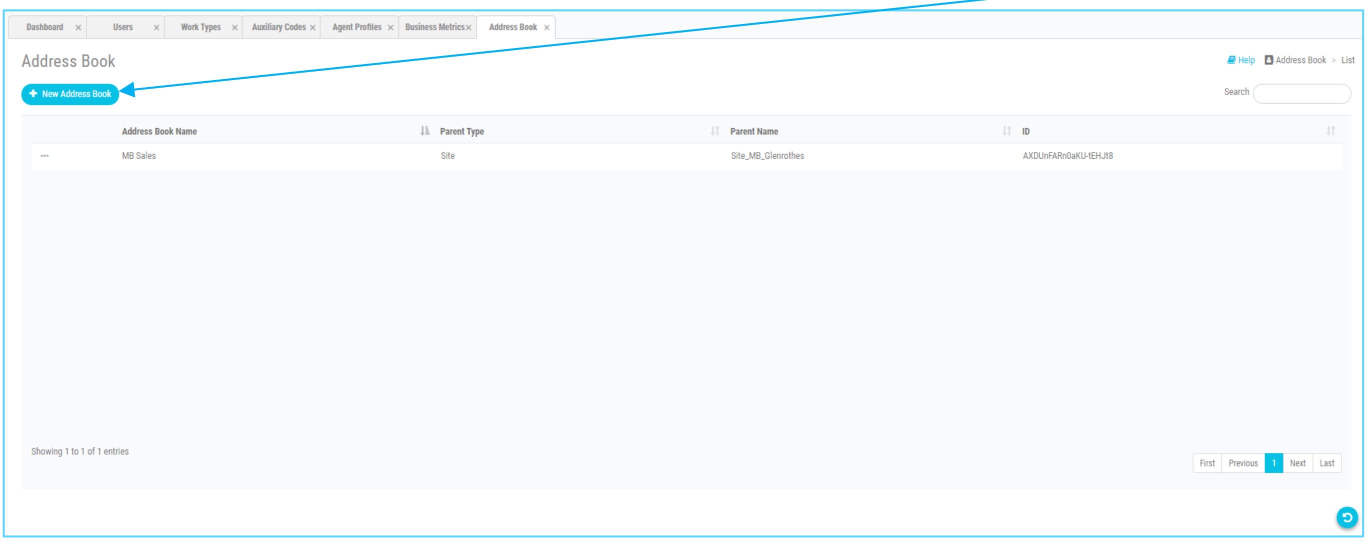
Threshold Rules are further explained in **Section 3.14**.
If your enterprise uses the **Agent Threshold Alerts feature**, the page also provides settings for specifying which, if any, thresholds are associated with the agent.

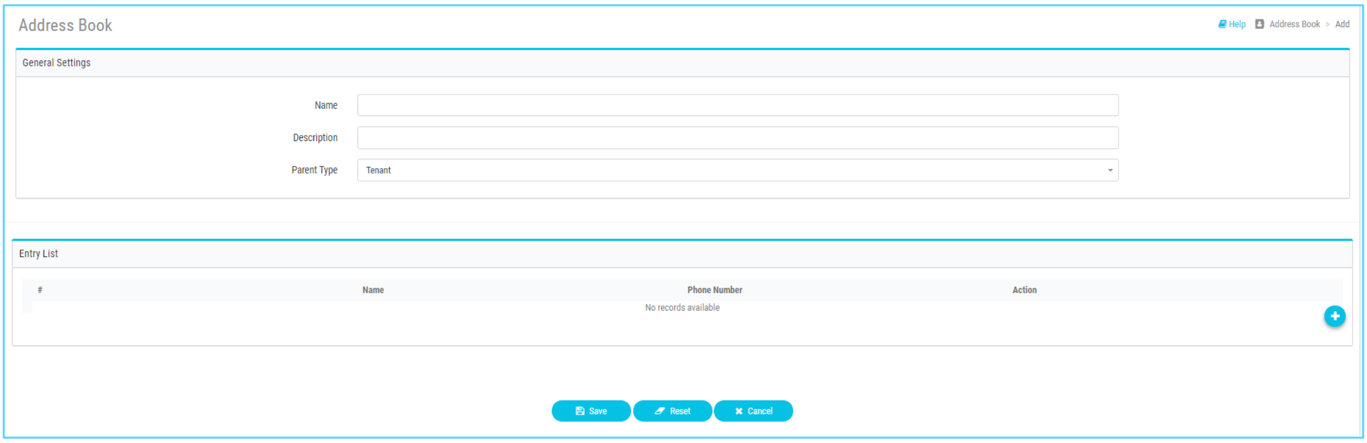
- **Agent Viewable Threshold Alerts**: Specify the alerts that you want the agent to receive by selecting rules from the drop-down. When an agent breaches a threshold rule, the system generates an alert and displays it in the Agent Personal Statistics tab in **Agent Desktop**.
- Enable **Agent Threshold Alerts**: Select **Yes** or **No** to specify whether you want the agent and the supervisor to receive alerts when the agent breaches specified threshold rules. If the agent breaches a selected rule, the system generates the alert and displays it in the **Agent Threshold Alerts** section of the **Agent Personal Statistics** tab. The supervisor also receives the alert in their **WebEx Contact Center Management Portal.**
- **Threshold Alerts**: This is available if you enable threshold alerts. If agent viewable threshold alerts are available, select the rules for triggering the alerts from the drop-down.

3.7 Address Book

From the WebEx Contact Center Portal navigation bar, choose **Provisioning** then **Address Book**.

- The **Address Book** page appears. This page displays a list of address books. Click **+ New Address Book.**



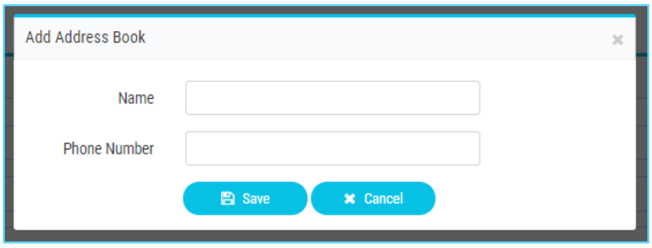


Note: The maximum number of entries in the Address Book is 150.

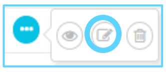
Enter the following details and click **Save**.

- **Name:** Enter a name for the address book.
- **Description:** (Optional) Enter the description of the address book.
- **Parent Type:** Select a parent type:
    - **Tenant:** The address book is available to all sites at your enterprise.
    - **Site:** The address book is only available for a specific site.
- **Parent Name:** Select the site for the address book. This field is available only if you select Parent Type as Site.
- (Optional) In Entry List, click the **+** icon to add new entries to the address book.
- The **Add Address Book** dialog box appears.

In the **Add Address Book** dialog box enter the following details:



- **Name:** Enter the name of the entry.
- **Phone Number:** Enter phone number of the entry.

- To edit an Address Book, click the **Three Dots** beside the Address Book you want to edit and click **Edit** 
- To delete an Address Book, click the **Three Dots** beside the Address Book you want to delete and click **Delete** 
- The **Heads Up!** dialog box appears. Click **Yes** to confirm.

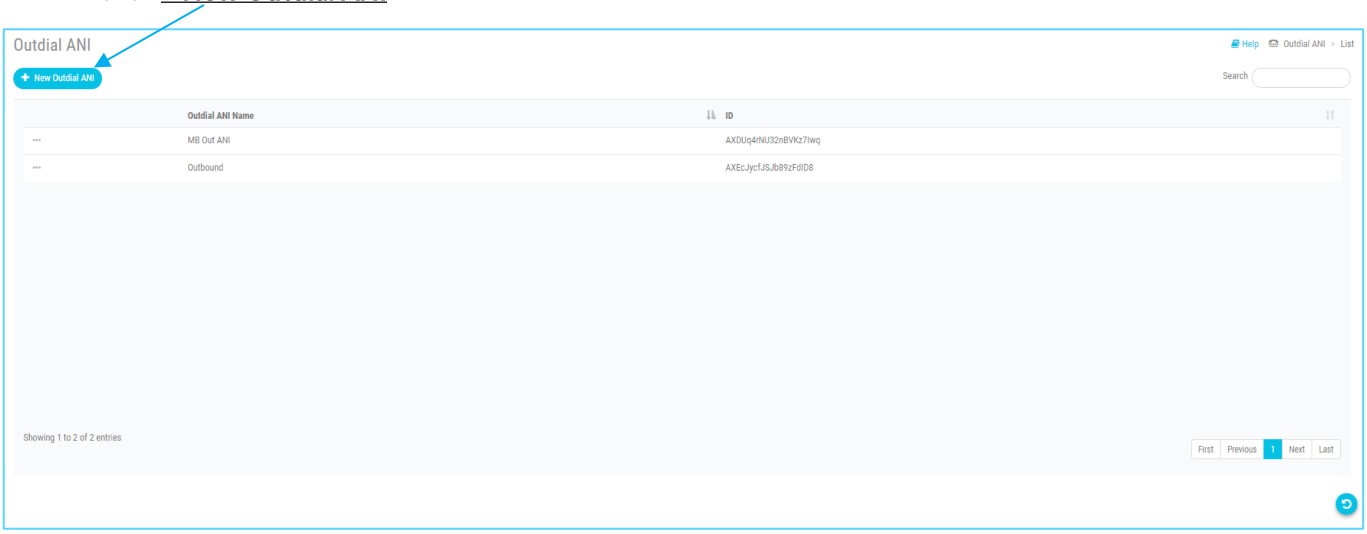
Note: You cannot delete an address book if you associate it with any other entities such as, agent profile. When you try to delete such address books, you get an error message. Click the information icon at the end of the message to view the list of all the associated entities.

3.8 Outdial ANI

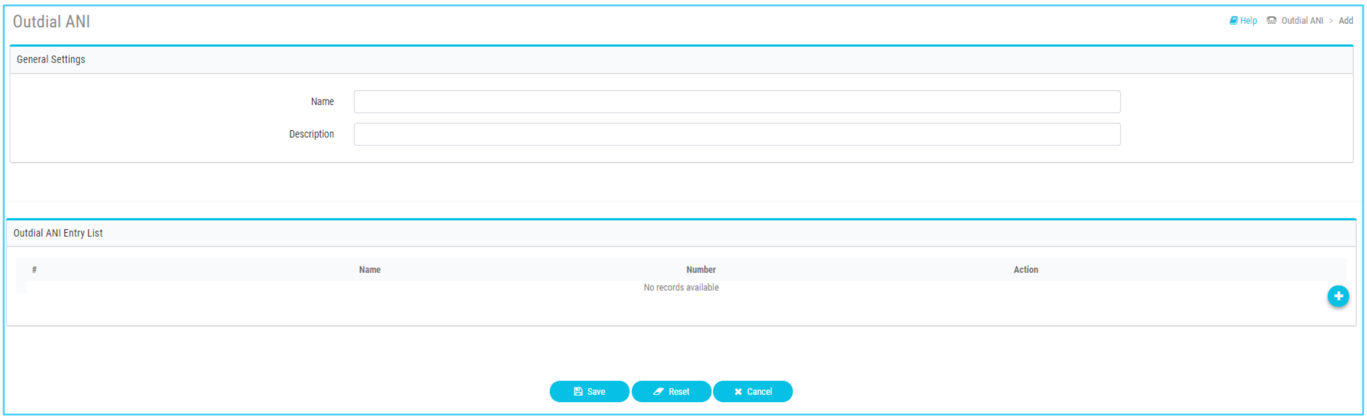
From the WebEx Contact Center Portal navigation bar, choose **Provisioning** then **Outdial ANI**.

The **Outdial ANI** page appears. This page displays a list of **Outdial ANIs**.

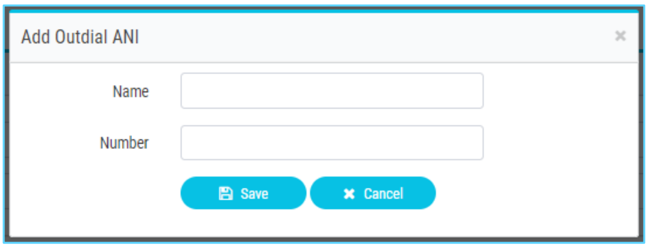
- Click **+ New Outdial ANI**



- Enter the following details and click **Save**
    - **Name**: Enter a name for the Outdial ANI.
    - **Description:**(Optional) Enter the description of the Outdial ANI.

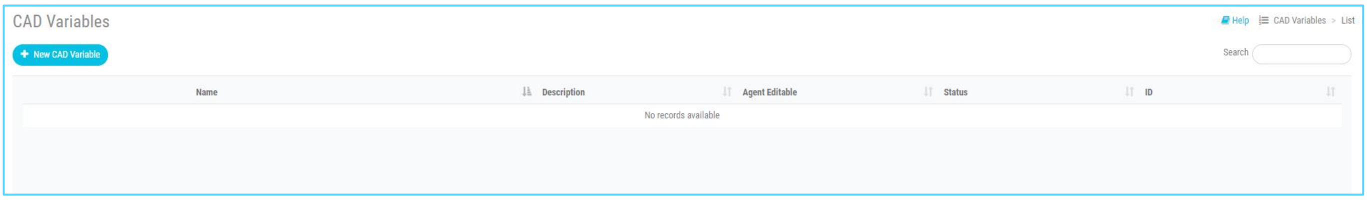


(Optional) In the **Outdial ANI Entry List**, click the **+** icon to add new entries to the Outdial ANI.



- The **Add Outdial ANI** dialog box appears.
- In the **Add Outdial ANI** dialog box enter the following details:
    - **Name**: Enter the name of the entry.
    - **Number**: Enter phone number of the entry.

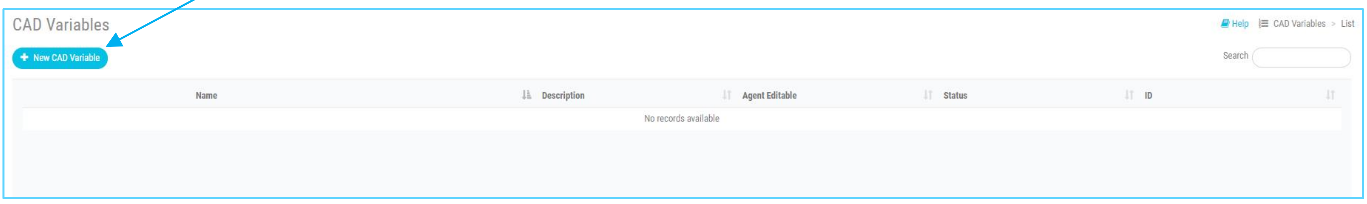
3.9 CAD Variables



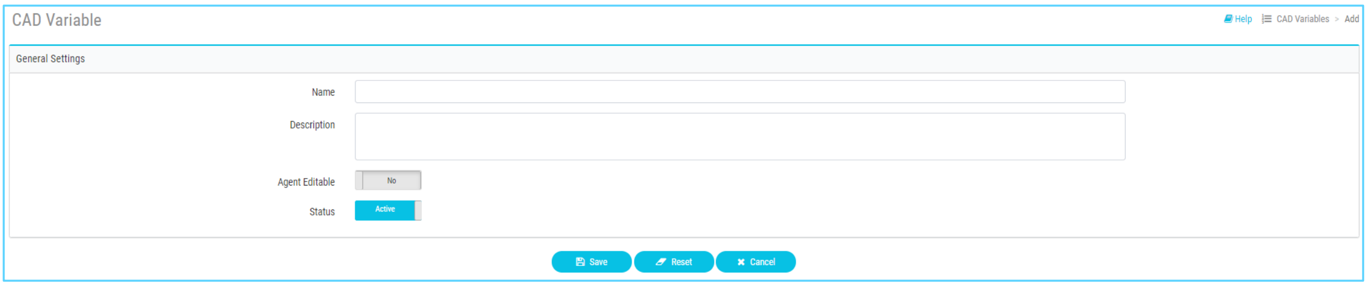
- You define **Call-Associated Data** (CAD) variables using the **Provisioning** module for use in call control scripts to collect one of the following types of data values:
- **Caller-entered data**: The data that the customer enters using IVR during a call, such as the account number.
- **Agent-entered** data: The data the agent enters, such as a case number or any action code.
- The system stores the CAD values in the cumulative call detail records (CCDRs). **WebEx Contact Center Management Portal** users can display and export to Excel or .csv files.
- **Note** the following:
    - The system stores a CAD variable that is used in a call control script only if the variable name matches the name of an active CAD variable that the organization administrator provisions for your enterprise.
    - You can view a list of the CAD variables used in a call control script in the Call Control section of the **Create Routing Strategy** or **Edit Routing Strategy** page.
- The system saves an agent-entered CAD value after the agent completes the Wrap-up state for that call. If due to some reason **Agent Desktop** connectivity is lost, the system does not store the CAD value that is entered by the agent. When an agent transfers a call, then the CAD variable that the last agent enters is saved.
- Note that: CAD variable values are visible to all individuals who have access to historical records on the **Management Portal**. You should not store secure data such as credit card numbers, PINs, and social security numbers should not be stored through use of CAD variables.
- The system stores the CAD data subject to network availability and other operation considerations. CAD variables provide reference data only and are not intended to provide **Customer Relationship Management** (CRM) functionality.
- You cannot delete a CAD variable but can deactivate it. You cannot use an inactive CAD variable to store data.
- Your organization administrator provisions the maximum number of CAD variables that you can define.

From the WebEx Contact Center Portal navigation bar, choose **Provisioning** and then **CAD Variables**.
The **CAD Variables** page appears. This page displays a list of CAD Variables.

- Click **+ New CAD Variable**.



The CAD Variable page appears.



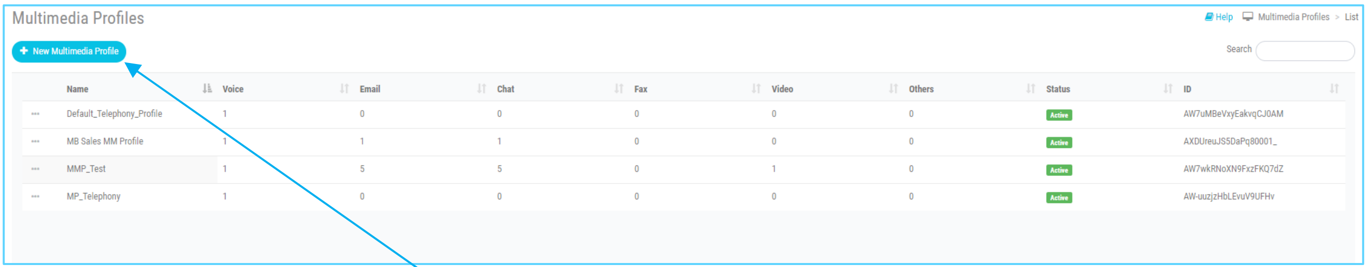
- Enter the following details and click **Save**.
- **Name**: Enter a name for the CAD variable. The name can include alphanumeric characters and the following characters:
    - **hyphen (-)**
    - **underscore (_)**
    - **space character**
    - The name cannot begin with space and cannot include two or more hyphens, underscores, or spaces in a row. You cannot edit the name later.
- **Description**: (Optional) Enter a description of the CAD variable.
- **Agent Editable**: Select **Yes** or **No** to specify whether agents can edit the value of the variables from the **WebEx Contact Center Agent Desktop**.
- **Status**: Select the **Status** of the CAD variable.
- As an example: You may want to create a CAD variable for CED (Caller Entered Digits) so that you can use a decision to send it to a certain queue. For Example, if caller enters 1, your **Administrator** can use this in a **Control Script** to send it to **Option 1 Queue**.

3.10 Multimedia Profiles

- If your administrator enables multimedia for your enterprise, you can assign each agent with a multimedia profile. Each profile specifies the number of each type of media, such as email, chat, or telephone, the agent can handle simultaneously.
- You can assign multimedia profiles to sites, teams, or individual agents. By default, the system assigns the 'Default_Telephony_Profile' to every site. You cannot edit or delete this profile but can re-assign a different multimedia profile to the site.
- All the teams under a site have the same multimedia profile as that of the site - unless you assign a different profile to the teams. Similarly, all the agents under the teams have the same profile as that of the team, unless you change the profile for the agents.

On the WebEx Contact Center Portal navigation bar, choose **Provisioning** and then **Multimedia Profiles**.

The **Multimedia Profiles** page appears. This page displays a list of multimedia profiles.



- To add a profile, click **+ New Multimedia Profile**.

- To view or edit a profile, click the **Three Dots** to the left of a listed profile and select **View** or **Edit**.
  - If you are adding or editing a profile, specify or change the settings on the page that appears, and then click Save. Settings are described below.
- To delete a profile, click the **Three Dots** to the left of a listed profile and select **Delete**.
  - You cannot delete a profile that is assigned to a site, team, or agent.
- **Profile Details**:
  - **Name**: Enter a name for the multimedia profile.
  - **Description**: Optionally, enter a description of the profile.
- **Allow agents to simultaneously handle multiple Realtime interactions**
  - If set to **Yes**, multiple Realtime contacts can be routed to the agent at the same time.
  - If set to **No**, only one Realtime contact can be routed to the agent at a time. For example, the agent cannot receive a chat contact while handling a voice contact.
- **Status**: Displayed on the **View** and **Edit** pages to specify whether the profile is **Active** or **Not Active**.
- **Media Details:**
  - **Voice**: For each media type, specify the number of concurrent contacts of that type an agent can handle or specify 0 if no contacts of that type can be sent to the agent. Currently, only email, chat, and telephony media types are available.
  - For **Voice**, you can specify only **0** or **1**.
- The maximum number of media channels is determined by the **Maximum Channels Per Profile** provisioned on the **Module Permissions** page of the tenant settings for your enterprise.
  - **Email**: Enter a value
  - **Fax**: Enter a value
  - **Chat**: Enter a value
  - **Video**: Enter a value
  - **Others**: Enter a value

3.11 Skills: Skill Profiles & Skill Definitions

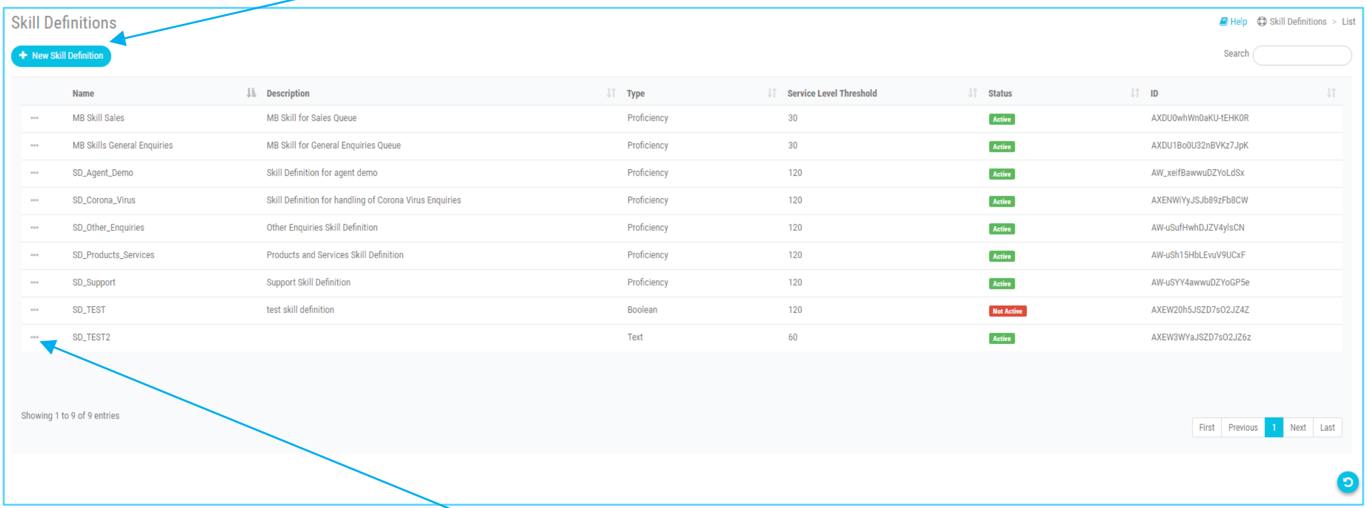
- **Skills-Based Routing** is an optional WebEx Contact Center feature that enables you to assign skill requirements, such as language fluency or product expertise, to incoming calls so they can be distributed to agents with a matching set of skills.
- The **Skill Definitions** page provides an interface for viewing, creating, and editing the skills that can be assigned to calls and to skill profiles, which can then be assigned to teams or individual agents.
- The maximum number of active skills that you can create is determined by the **Maximum Skills** and **Maximum Text Skills** values provisioned for your enterprise.
- To create, view, or edit skill definitions:

Skill Definitions

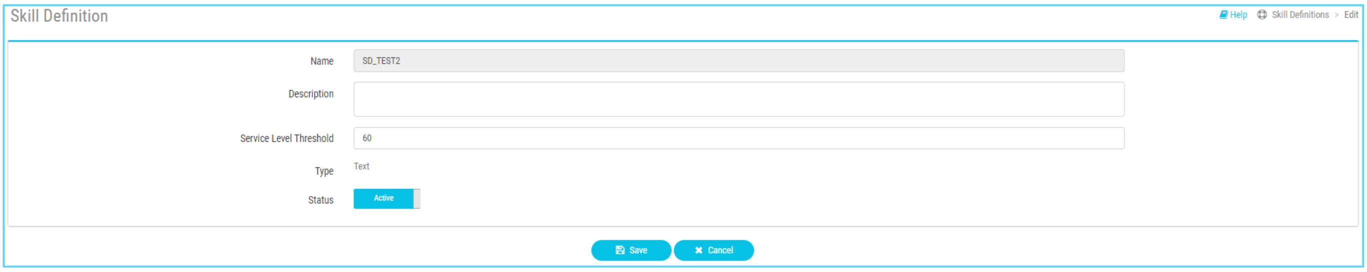
On the Portal navigation bar, select **Provisioning** > **Skills** > **Skill Definition**.

On the **Skill Definitions** page:

- To add a new skill definition, click <u>**+ New Skill Definition**</u>.



- To edit a skill definition, click the <u>**Three Dots**</u> to the left of a listed skill and select **Edit.**



Specify or change the settings for the skill as described below, and then click **Save**.

- **Name**: Enter a name for the skill.
- **Description**: Optionally, enter a description of the skill.
- **Service Level Threshold**: Specify how many seconds a customer call can be in queue for this skill before being flagged as outside service level. If a call is completed within this time interval, it is considered to have been handled within service level for this skill.
- **Type**: If you are creating a new skill, specify the skill type (you cannot change the skill type):
  - **Text**: A free-form text skill that must be matched exactly. For example, you might define a skill named **Extension** that will let you route a call to a specific agent's extension number based on digits entered by the caller in response to a prompt. The text value can include up to 40 characters, including spaces.
  - **Proficiency**: Can have a value ranging from 0 to 10 that represents the agent's level of expertise in the skill. For example, you might define a skill for each language that your agents speak.
  - **Boolean**: Can have the value of True or False to indicate whether or not the agent has the skill. For example, you might define a skill named '**PlatinumService**' to ensure that your most valuable customers get the best service. Your most experienced agents can be assigned a value of True, and your least experienced agents can be assigned a value of **False**

- ◦ **Enum**: A named set of predefined values. For example, a skill named **Line of Business** might have a set of three values: **Sales**, **Service**, and **Billing**. Each value can include up to 20 characters, including spaces.
- **List Values**: If the skill type is **Enum**, specify the values that can be associated with this skill. For example, for an **Enum** skill named **Operating System**, you might define three values: **Windows**, **Linux**, and **Unix**. Each value is limited to a maximum length of 20 characters, including spaces.
  - To add a value, type the value name in the **List Value** field and then press **Enter**. Repeat for each value you want to add.
  - To delete a value, click the **x** on the left side of the value entry.
- Status: Select **Active** or **Not Active**. A skill cannot be made inactive if it is used in a skill profile or a routing strategy.

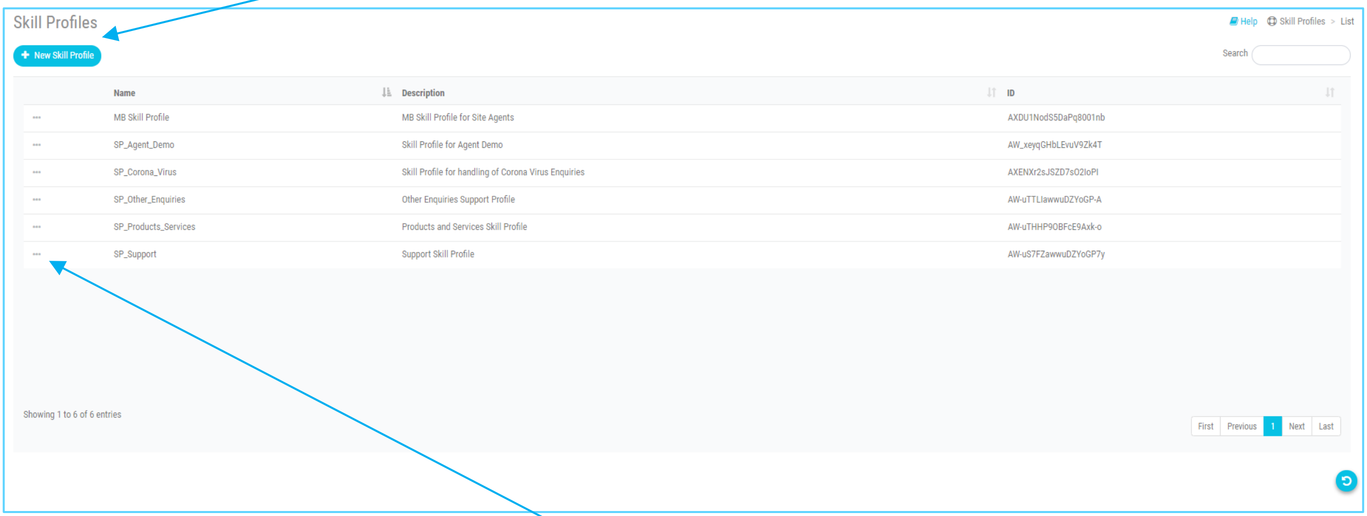
Skill Profiles

- A **Skill Profile** is a set of skills, each with an assigned value, that can be assigned to an agent-based team or to an individual agent. For example, a skill of English might be assigned a high level of proficiency in one skill profile and a lower level in another profile.
- If a skill profile is assigned to a team, all agents logged in to that team are associated with that skill profile unless the agent is assigned a specific skill profile.

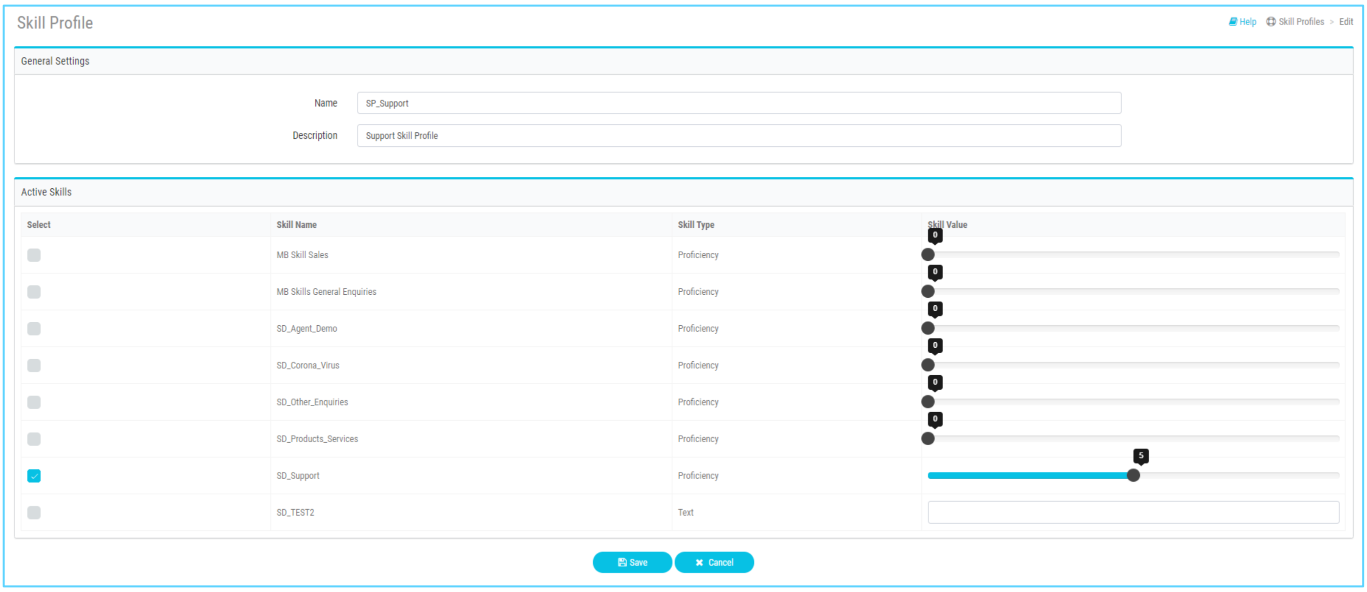
On the WebEx Contact Center Portal navigation bar, select **Provisioning** > **Skills** > **Skill Profiles**.

On the **Skill Profiles** page:

- To add a skill profile, click <u>**+ New Skill Profile**</u>.



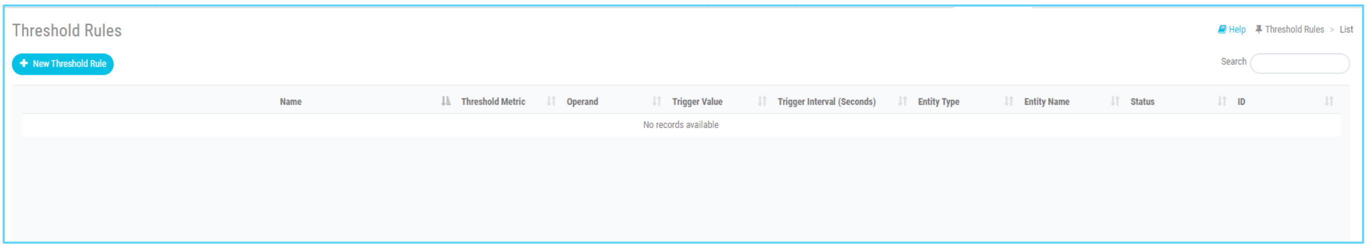
- To copy or edit the settings for a skill profile, click the <u>**Three Dots**</u> to the left of a listed skill profile and select Copy or Edit.
- Enter or change the name and optional description of the skill profile on the **Add**, **Copy**, or **Edit** page.



- Select or clear the check box to the left the name of each skill you want to add to or remove from the skill profile and specify the value of each selected skill as described below.
  - **Proficiency**: Drag the slider to a number between 0 and 10 to indicate how proficient the agent is in this skill.
  - **Boolean**: Click one of the radio buttons to specify whether the agent has this skill (**True**) or does not have the skill (**False**).
  - **Text**: Enter a maximum of 40 characters (including spaces).
  - **Enum**: Select the check box next to each list value that represents a skill the agent has.
- Click **Save** to save the skill profile.

3.12 Threshold Rules

- If your enterprise uses the **Threshold Alerts** feature, authorized users can create threshold rules to monitor agent and call data.
- A threshold alert can be displayed in the **Agent Personal Statistics** tab on the **Agent Desktop** if **Agent Viewable** is set to **Yes** for the threshold rule and the threshold alert is selected in the agent profile assigned to the agent.



- Threshold rules can be configured for the call and agent metrics listed in the following table. For each rule, you specify a value that will trigger the alert and one of the following operands:
  - > Greater than
  - >= Greater than or equal to
  - < Less than
  - <= Less than or equal to
  - = Equal to

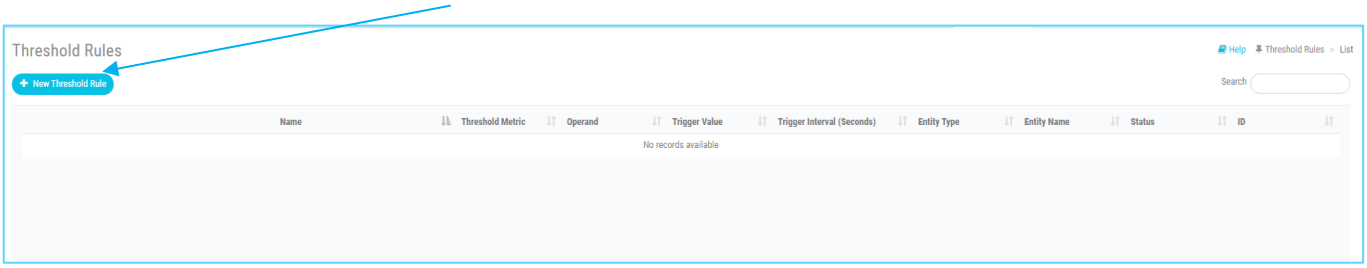
Threshold Table

Metric	Entity Type	Trigger Value Type
Abandoned Calls	Queue	Count
Average Queue Time	Queue	Duration
Average Speed of Answer	Queue	Duration
Blind Transferred Calls	Queue	Count
IVR Calls	Entry Point	Count
Longest Time in Queue	Queue	Duration
Number of Calls in Queue	Queue	Count
Overflow Calls	Queue	Count
Service Level Threshold	Queue	Percentage
Short Calls	Entry Point or Queue	Count
Transferred Calls	Queue	Count
Available Agents	Site or Team	Count
Connected Agents	Site or Team	Count
Current Available Time	Agent	Duration
Current Connected Time	Agent	Duration
Current Hold Time	Agent	Duration
Current Idle Time	Agent	Duration
Current Wrap-up Time	Agent	Duration
IB Average Handle Time	Site or Team	Duration
Idle Agents	Site or Team	Count
Not Responding Agents	Site or Team	Count
Number of Agents in Outdial	Site or Team	Count
Number of Logged in Agents	Site or Team	Count
OB Average Handle Time	Site or Team	Duration
Occupancy	Site or Team	Percentage
Total Available Time	Agent	Duration
Total Idle Time	Agent	Duration

- The maximum number of threshold rules that you can create is determined by the **Maximum Threshold Rules** value provisioned for your enterprise.

On the WebEx Contact Center Portal navigation bar, select **Provisioning** > **Threshold Rules**.

- To add a new rule, click **+ New Threshold Rule**.



- To view, copy or edit the settings for a threshold rule, click the **Three Dots** to the left of a listed rule and select **Copy** or **Edit**.
- To delete a threshold rule, click the **Three Dots** to the left of a listed rule and select **Delete.** Then, in the confirmation dialog box, click **OK**.

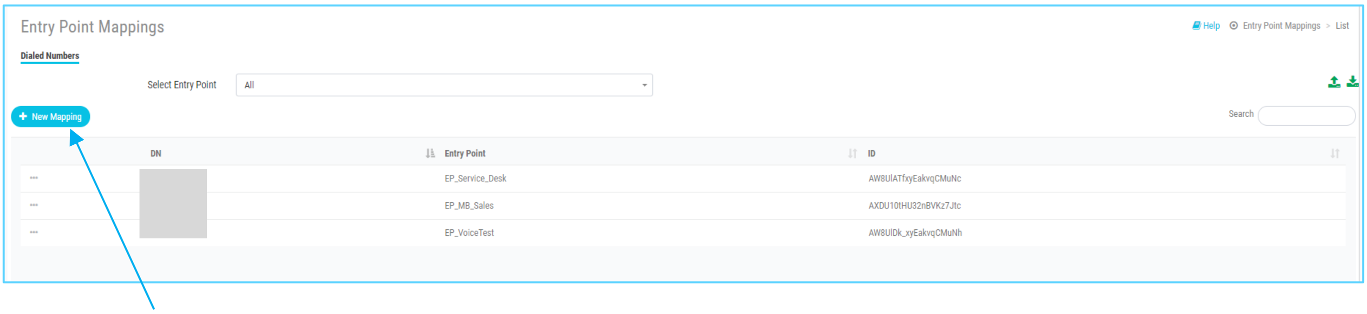
If you are adding, copying, or editing a threshold rule, specify or change the settings for the rule as described below and click **Save**.

- **General Settings**
  - **Name**: Enter a name for the rule.
  - **Description**: Enter a short description of the rule.
  - **Agent Viewable**: Select **Yes** or **No** to specify whether an alert can be sent to agents when the threshold rule is breached. If **Yes**, this rule will be available for selection on the **Agent Profiles > Agent Thresholds** page when you create or edit an agent profile (see **Agent Profiles**).
  - **Entity Type**: Select the entity type that the threshold rule will apply to: **Entry Point**, **Queue**, **Site**, **Team**, or (if your enterprise uses the **Agent Threshold Alerts** feature) **Agent**.
  - **Status**: This setting appears on the **Edit** page to specify whether the threshold is **Active** or **Not Active**.
- **Entity Information**
  - **Metric Type**: Specify whether this is an agent threshold or a call threshold.
  - **Entity**: Select the entry point, queue, site, or team that the rule will apply to. This setting is not applicable if the entity type is **Agent**.
- **Threshold Information**
  - **Threshold Metric**: Select a value from the drop-down list. The list displays only those metrics that are applicable to the selected entity type.
  - **Operand**: Select a value from the drop-down list:
    - (greater than), >= (greater than or equal to), < (less than), <= (less than or equal to), = (equal to)
  - **Trigger Value**: Specify the value that will trigger a threshold alert. The value type (duration, count, or percentage) is based on the metric selected.
  - The trigger value must be greater than 0 for all metrics except **Available Agents**, **Connected Agents**, **Number of Agents in Outdial**, and **Number of Logged in Agents**.
  - **Trigger Interval**: Specify the interval, in seconds, during which the system will generate only one alert for the threshold rule check.
- **Email Information**
  - **Notification Receivers**: If you want an email alert or text message to be sent to an individual when the threshold is triggered, enter the email address in either the **Notification Receivers** or the **Text Notification Receivers** field, and then press **Enter**. Repeat for each address you want to add.
  - **Text Notification Receivers**: To remove an address, click the **x** on the left side of the listed address.

3.13 Entry Point Mappings

The **DN to Entry Point Mappings** page is an interface for managing the mappings between **Dial Numbers** (DN) and entry points.

- To use an entry point you must map a dial number to the entry point.
- You can also add and remove multiple DN mappings using a .csv file.
- From the WebEx Contact Center Portal navigation bar, click **Provisioning**. Click **DN to Entry Point Mapping**.
- The DN to Entry Point Mapping appears. This page lists all the available mappings.



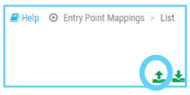
- Click **+ New Mapping**.

Enter the following settings and click **Save**.

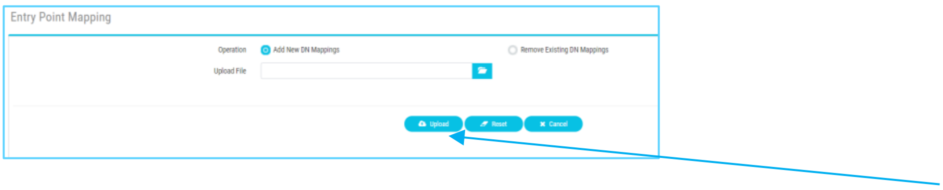
- **DN**: Enter the ingress toll-free or DID number. The format must match with the number that you receive from the inbound carrier. You can only enter numbers.
  - If WebEx Calling is enabled, you can select a DN from the drop-down. BrightCloud will set this according to your Organisation's requirements. Your Service Provider can configure the DNs from Control Hub.
- **Entry Point**: Select the entry point to which you want to map the DN. If you want to map the entry point later, select **None** from the drop-down.
- **Note**: The changes take effect after the system automatically synchronizes the associated files per hour.
- You can **Edit**/ **Delete** a mapping as long as it is not in use by clicking on the **Three Dots** next to **DN.**

To add or remove dial number to entry point mappings in bulk:

- Before you begin:
  - Create a CSV file with new-line separated entries and save it in your local system. Each line must include a comma-separated dial number and entry point ID pair. For example: 8005551234, AVx90dWsbxpvzWSp3Tso



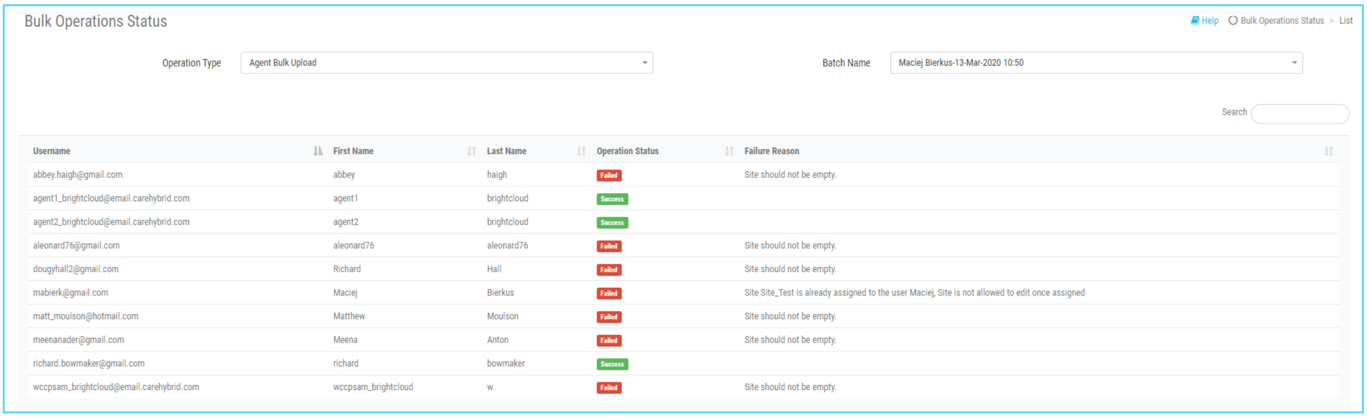
- From the **DN to Entry Point Mapping** page, click **Bulk Update**
- Do one of the following:
  - Add **New DN Mappings**: To add new dial number and entry point mappings in bulk.
  - **Remove Existing DN Mappings**: To overwrite the existing mappings with new mappings in bulk.



- Upload the new CSV file from your local system and click **Upload**.

3.14 Bulk Operation Status

On the WebEx Contact Center Portal navigation bar, select **Provisioning** > **Bulk Operation Status**.



Username	First Name	Last Name	Operation Status	Failure Reason
abbey.haigh@gmail.com	abbey	haigh	Failed	Site should not be empty.
agent1_brightcloud@email.carehybrid.com	agent1	brightcloud	Success	
agent2_brightcloud@email.carehybrid.com	agent2	brightcloud	Success	
aleonard76@gmail.com	aleonard76	aleonard76	Failed	Site should not be empty.
dougyhall2@gmail.com	Richard	Hall	Failed	Site should not be empty.
mabierk@gmail.com	Maciej	Bierkus	Failed	Site Site_Test is already assigned to the user Maciej, Site is not allowed to edit once assigned
matt_moulson@hotmail.com	Matthew	Moulson	Failed	Site should not be empty.
meenanader@gmail.com	Meena	Anton	Failed	Site should not be empty.
richard.bowmaker@gmail.com	richard	bowmaker	Success	
wccpsam_brightcloud@email.carehybrid.com	wccpsam_brightcloud	w	Failed	Site should not be empty.

Here you can view:

- **Operation Type**
- A list of **Users** who have been added via a **Bulk Upload**
- Which **Administrator** added the batch of users
- The time and date that your **Administrator** added the batch of Users
- Whether the Operation **Passed** or **Failed** and the **Failure Reason**

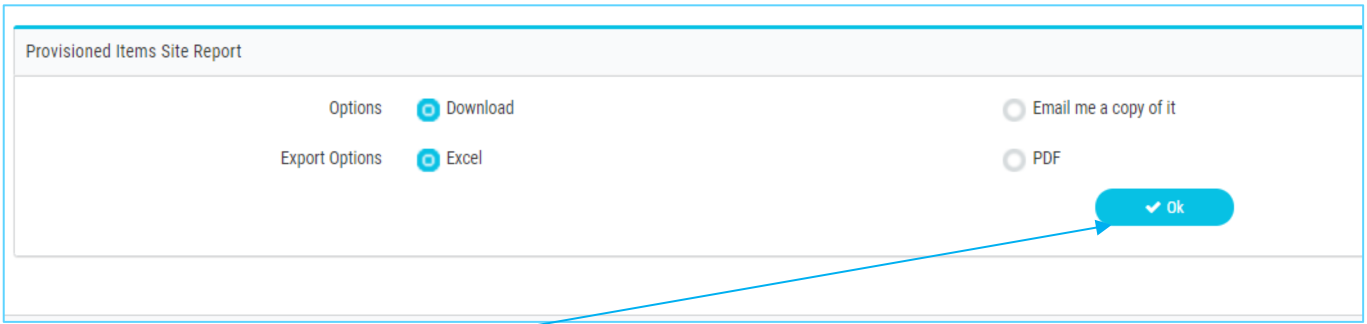
Click on **Provisioning** > **Templates** and you can download an **Agent Update Template** for your **Administrator** to upload.

3.15 Reports

You will find this under **Provisioning** > **Reports.**

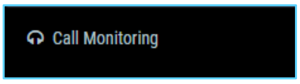
You can select from a drop-down list of reports to either:

- **Download/ Export** in Excel or PDF format
- **Email** yourself a copy



Click **OK** to save your choice and proceed.

4. Call Monitoring



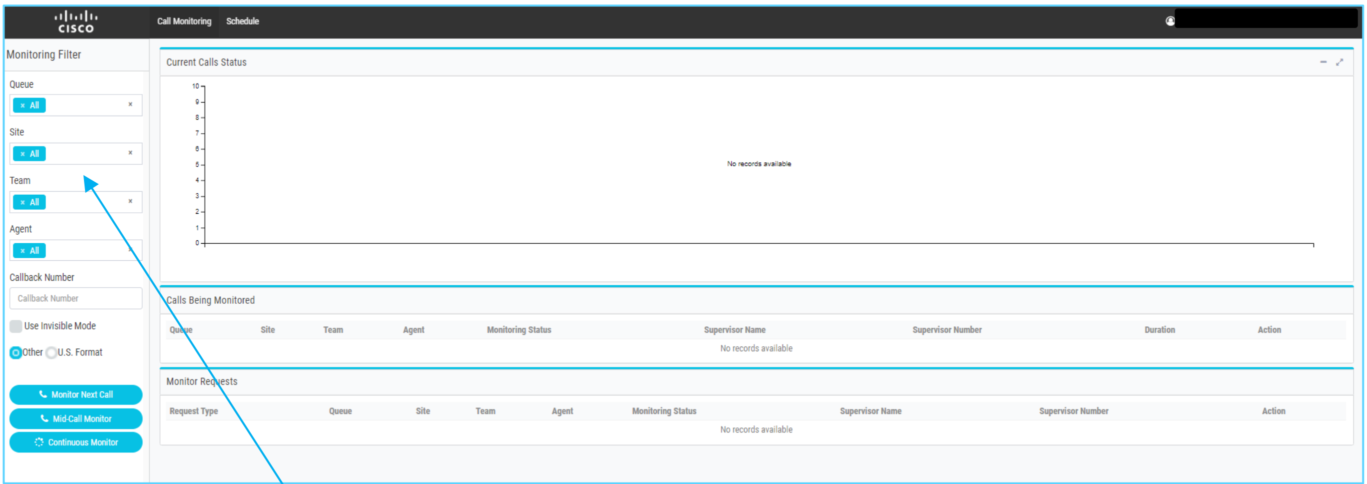
The WebEx Contact Center Call Monitoring module enables contact centre managers to monitor the quality of service being delivered across their multi-source contact centres. Authorised users can select a combination of one or more queues, sites, and teams, as well as a specific agent they want to monitor. After these criteria have been entered, the system places a request to monitor the next call that matches the combination of all the criteria when the call is distributed to the destination site. Monitoring can be done on a continuous, one time only (ad hoc), or scheduled basis, and authorised users can monitor a call that is already in progress.

The audio for the call is delivered through an inbound phone call using a phone number associated with the user engaged in monitoring. Authorised supervisors can coach an agent during a connected call by providing comments that only the agent can hear and can barge in on a call and become part of the conversation between the agent and the customer.

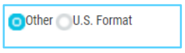
Note the following:

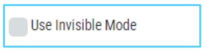
- You cannot make a continuous monitoring request and an ad-hoc request for the same target at the same time.
- If a scheduled request and a continuous request are made for the same target, the continuous request takes precedence. When the continuous request is paused or cancelled, the scheduled request is enabled.
- If a scheduled request and an ad-hoc request are made for the same target, the ad-hoc request takes precedence. When the ad-hoc request is either cancelled or completed, the scheduled request is enabled.
- If you sign out of the Management Portal while a monitoring request is still active, a message asks if you want to cancel the monitor request or continue monitoring.
- If you select Yes, any active mid-call, ad-hoc, or continuous monitoring requests will be cancelled after you log out and any scheduled requests will be suspended.

To open the **Call Monitoring** Page, click on the 'headphones'  icon in the navigation bar of the **Management Portal**.



- In the Monitoring Filter Panel on the left side of the page, specify one or more queues, sites, teams, and agents you want to monitor. If you leave a **Queue**, **Site**, **Team**, or **Agent list** set to **All**, only those entities to which you have access will be included in the request.

- In the Callback Number field, enter the phone number where you want the audio to be sent and click Register. Enter all the digits required to reach that phone, without hyphens or other special characters.
- Select **Other** Format. 

Other indicates that the phone number format is other than U.S. format.
- If you want to prevent this monitoring session from being displayed on other users' **Management Portals**, select the Use Invisible Mode 

check box.
- Click one of the following buttons to submit your monitor request.
  - 

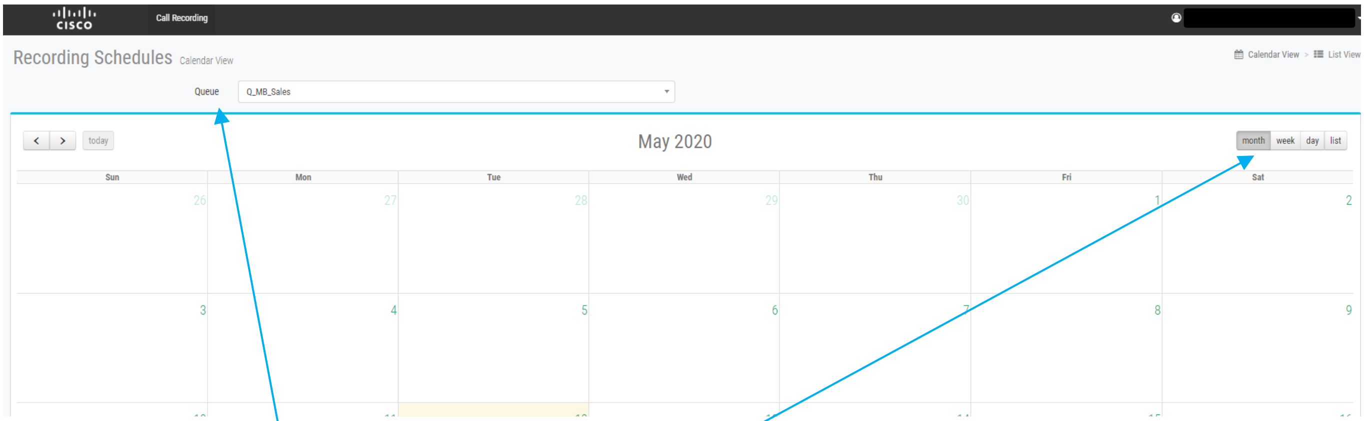
Monitor next call: Monitor the next incoming call that fits the specified criteria.
  - 

Mid-call Monitor: Monitor a call that is already in progress and connected to an agent. This button is available only if mid-call monitoring is authorized by your user profile. If no call is in progress, the request fails.
  - 

Continuous Monitoring: Continuously monitor calls that fit the specified criteria. After you click this button, a dialog box appears where you can enter the duration of the monitoring session in minutes or leave the default set to Unlimited. Then, click Monitor to dismiss the dialog box and submit your request.
- **Note:** After the monitor duration has expired, the system may take up to 5 minutes to remove the monitor request, during which time one additional call might be delivered to you.
- If authorized by your user profile, you can click the **Coach** or **Barge In** button in the **Action** column to coach the agent or barge in on the monitored call.
- When the call has ended, click **Monitor Next Call** to monitor the next call in the queue, or, if you selected **Continuous**, the next call in the queue is automatically sent to you.
- Click the **Cancel** button to cancel monitoring activity for that request. If you selected **Continuous**, you could click the **Pause** button to temporarily halt the calls sent to your number. Then you can click the **Resume** button to resume monitoring.
- Note: If an agent goes into the **Not Responding** state, the call goes back to queue and the caller hears music on hold. If during this time, a supervisor is monitoring the call, the supervisor is disconnected as well. If the supervisor is scheduled to monitor the call but has not yet picked up, the call disappears from the **Monitor Requests** list and the phone stops ringing.
- If the **Whisper Coach** feature is enabled in your user profile, you can speak to an agent who is being monitored without being heard by the customer.
  - The coaching session continues, even if the call is transferred to another agent, until the call either ends or is transferred to another number (agent-to-DN transfer).
  - If the coached agent consults with another agent, you will hear music on hold and will not be able to continue coaching the agent until the caller is taken off hold.
- While coaching an agent, you can barge in on the call if the **Barge In** feature is enabled in your user profile. To silently coach an agent:
  - While you are monitoring a call (as described in Monitoring Calls and the call is connected to an agent, click the **Coach** button.
  - Do not click the Coach button if the call is waiting in a queue after having been transferred by the agent to another queue. Doing so will cause your coach request to fail.
  - The Coach button is not available when the agent transfers the call to another number (DN transfer).
  - Provide verbal instructions to the agent.
  - To remove yourself from the call, hang up. The call is removed from the **Calls Being Monitored** list.

5. Call Recording and Recording Management

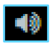
For **Call Recording**, click on the 'Microphone'  icon in the left panel of the **Management Portal**.

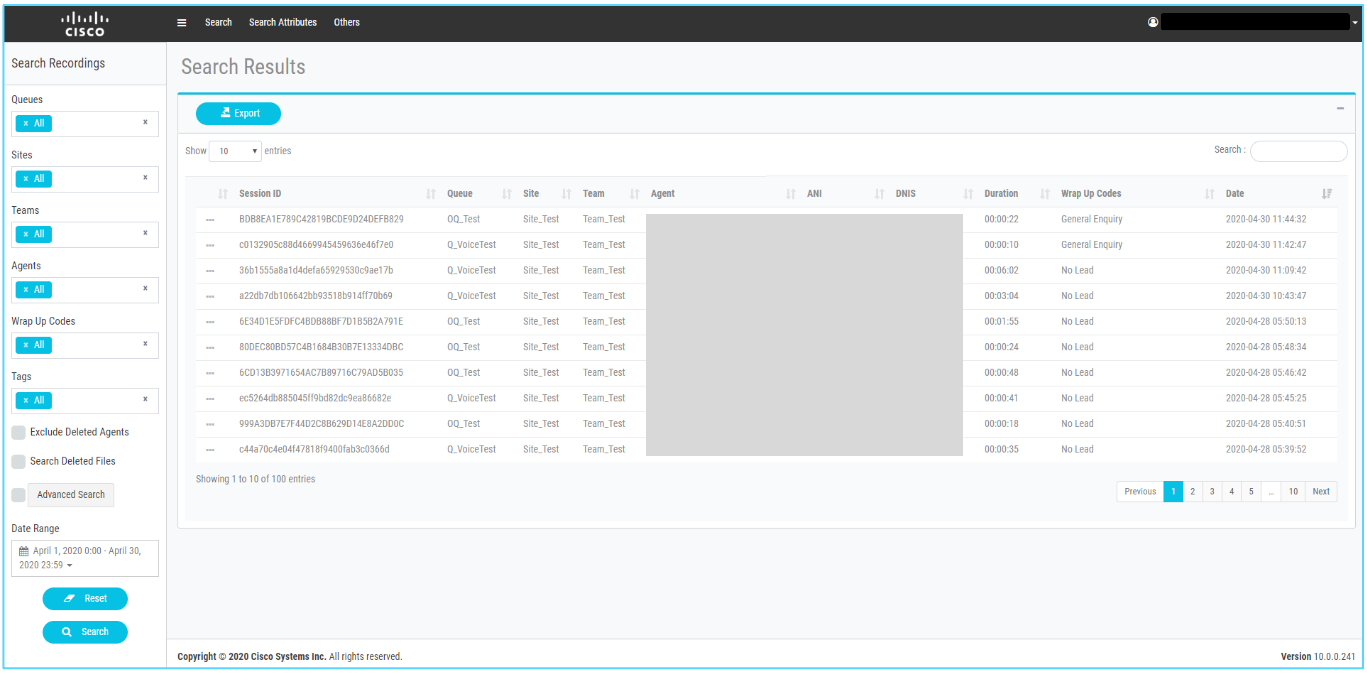


Here you can View any call **Recording Schedules** IF these are set up by your **Administration**.

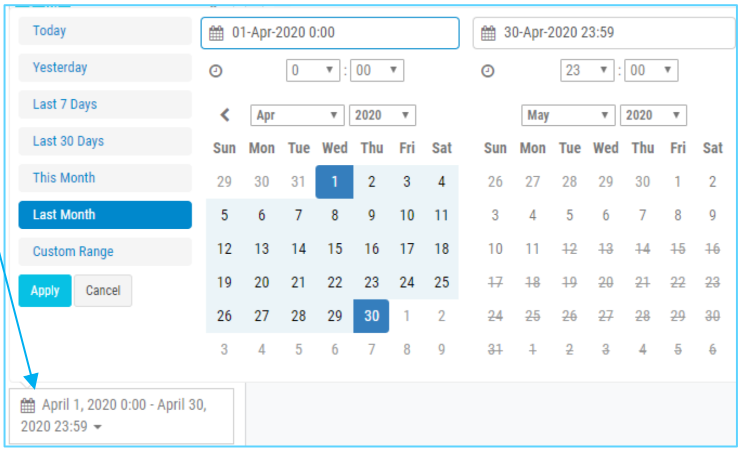
You can view these by clicking on the **Date/Time Range buttons.**

You can also **Filter** by **Queue**.

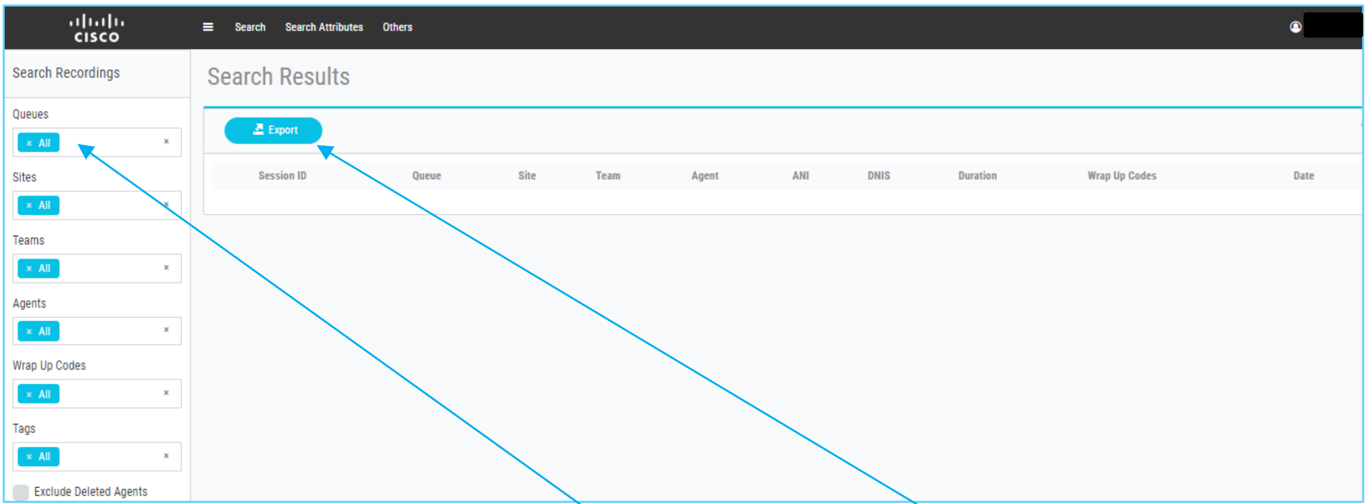
For **Recording Management**, click on the 'Speaker'  icon in the left panel of the **Management Portal**.



Select the **Calendar** icon to select your date range. You can choose between the pre-configured date ranges or select your own dates and times.



- You can search recordings you would like to play back.

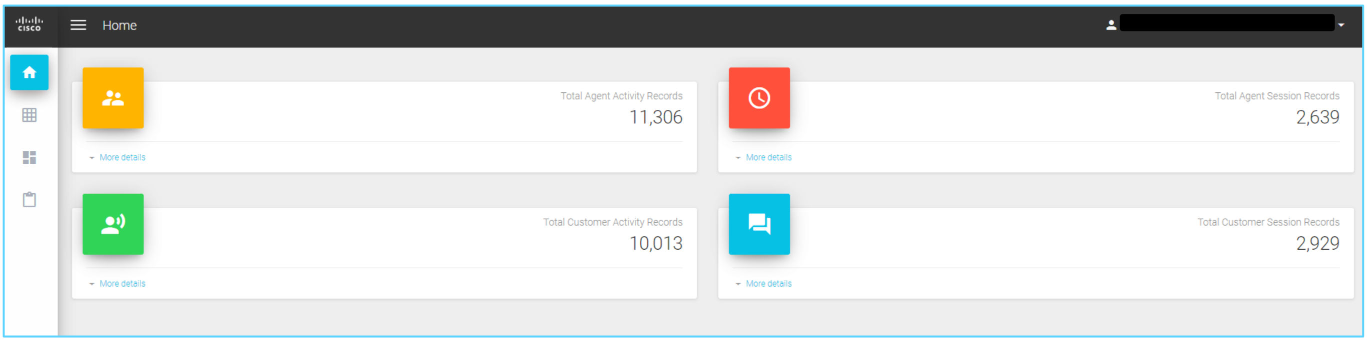


You can **Filter** by any of the choices in the **Search Panel** on the left. You can **Export** the list of recordings you wish to view to Excel.

	A	B	C	D	E	F	G	H	I	J	K
1	Session ID	Queue	Site	Team	Agent	ANI	DNIS	Duration	Wrap Up Codes	Date	
2	b154b5f40c2d4033994ff28735170240	Q_VoiceTest	Site_Test	Team_Test	agent1 brightcloud	7711404530	2037479370	00:00:27	General Enquiry	11/05/2020 05:39	
3	544dce4904524dcf85a1410bc4053179	Q_VoiceTest	Site_Test	Team_Test	agent1 brightcloud	7711404530	2037479370	00:06:40	Passed to Sales	07/05/2020 05:28	
4											
5											
6											

6. Reporting and Analytics

To access **Reports**, click on the 'Search tool' [Reporting and Analytics] icon left panel of the **Management Portal**. A new tab will open. Use the same credentials you used for **Management Portal** to log into **Reports**.

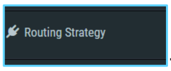


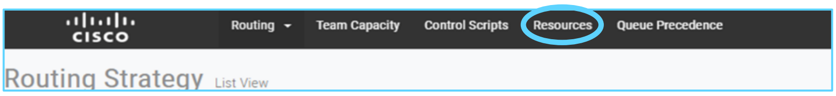
Please see the **WebEx Contact Center Customer Journey Analyzer User Guide** for further information. This was sent to your lead **Administrator** during the **Onboarding** process.

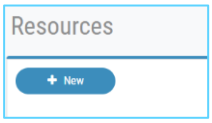
7. Message and Music Files (.WAV)

- All **Audio Files** the caller hears within WxCC are in the format of a **.wav** file (wav: u-Law, 8.000 kHz. 64 Kbps, mono)
- **Music on hold**
- **IVR message**
- **Closed messages**
- **Message while on hold**
- All wav files are stored in application under **Resources** tab of **Routing Strategies**
- **Routing Strategy** > **Resources**
- If supervisors/administrators need to implement a new .wav file, they can upload it to the resources tab and then attach it to the correct Routing Strategy
- Use the following file format and settings:

To upload a new .wav file:

- Go to the **Routing Strategy** tab (plug icon) 

from the left panel of the **Management Portal**
- Open the Resources Tab 



- Click on the '**+ New**' resource
- Browse to your files to attach the correct .wav file
- The .wav file name will automatically populate when the file is attached
- **IMPORTANT**: Be sure there are no spaces in the .wav file name. If there are the wav file will not be compatible and will cause an error

Version	Author	Release Date	Signed by
1.0	Abbey Haigh	20/05/2020	Alex Morrison

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