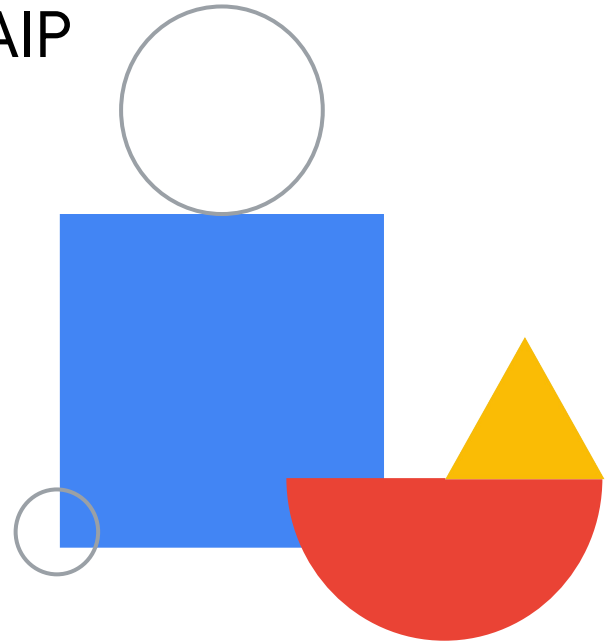


Module 1: Getting Started with CCAIP

Manager Training



In this module, you learn to ...

01 Recognize CCAIP manager permissions

02 Log into CCAIP (via the Portal or SSO)

03 Modify your profile information

04 Locate CCAIP technical documentation



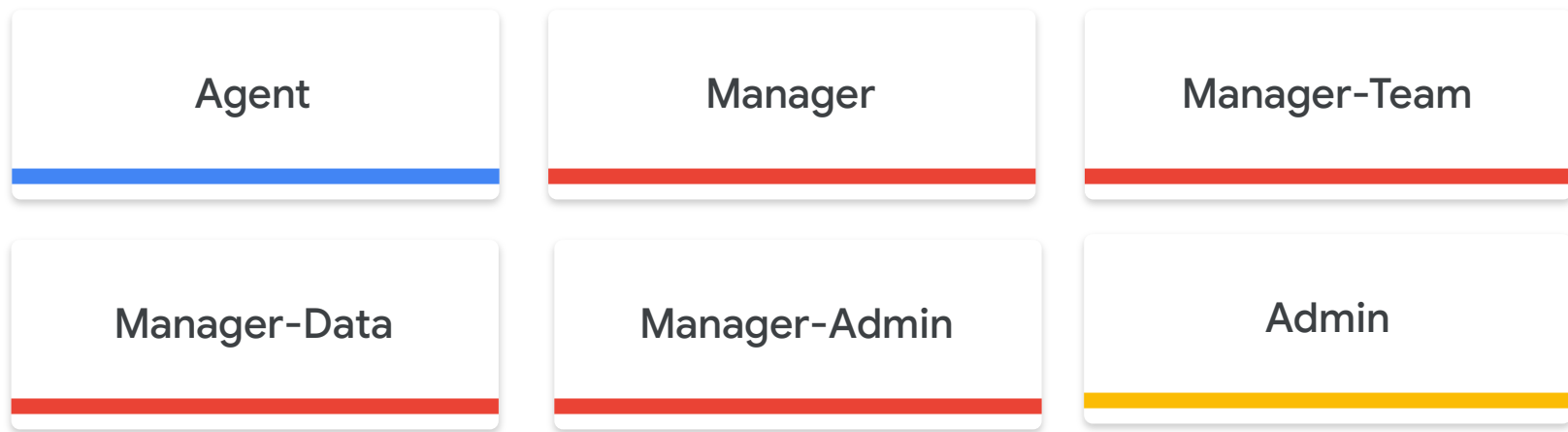


01

Recognize CCAIP manager permissions

User roles and permissions

- Roles define your configuration, monitoring, and reporting access within CCAIP.
- There are six predefined roles with CCAIP platform:



- Users can be assigned multiple roles to have a combination of accesses.

User roles: Agent

| Permissions | CCAIP portal access | No access | Available actions |
|--|---|--|--|
| <p>This is the only role that has access to the CCAIP call/chat adapter. The adapter can be utilized in the portal or CRM.</p> | <p>Agents will receive calls/chats based on the queue assignment.</p> | <ul style="list-style-type: none">• Settings• Monitoring• External storage• Reports | <ul style="list-style-type: none">• Take inbound calls and chats• Place outbound calls• Listen to voicemails• Take escalation calls |

The **manager role** can refer to the overall contact center supervisor or team managers who work with a specific group of agents.

User roles: Manager

General settings

General settings information

- Managers have no access to queue configuration (in the Settings menu).
- Managers can assign agents and teams to queues or modify assignments.
- Users who only have the Managers permission designation will not be able to take calls and chats.
- Ensure managers also have agent user permissions take escalated calls and chats.

Managers can

- Add agents, create teams, and remove users.
- Edit the Language and Messages area of the portal.
- Create and edit chat shortcuts.

User roles: Manager

Monitoring and reporting

The manager role has access to the following monitoring and reporting data points:

- Call/chat dashboards
- Agent data
- Calls/chats (connected, queued, or completed)
 - Call/chat IDs are a clickable link when the session ID checkbox is selected.
- Call recordings and transcripts in external storage
- Queue data
- Users in the manager role will have access to historical reporting.

Note: Team Managers will have access to all of the above but only for their specific team of agents.

If a user needs access outside of what is offered in one of the six pre-established roles, custom access can be created.

For more information on custom access creation, please refer to the [Custom Roles and Permissions](#) article.

Each of the four different types of managers have different settings, visibilities, and features. Take a look at the charts on the next few slides to learn more about each manager type.

Manager: queue and settings configuration access

| Role | Queue Configuration: Assignments | Queue Priorities | Settings Configuration |
|---------------|---|---------------------------|--|
| Manager | Assign agents/teams to queues | Able to create priorities | Access to Users and Teams and Languages and Messages |
| Manager-Team | Assign agents/teams to queues (team-specific) | Able to create priorities | No Access |
| Manager-Data | Assign agents/teams to queues (team-specific) | Able to create priorities | No Access |
| Manager-Admin | Assign any agents or teams to queues | Able to create priorities | Full access, including target metrics |

Manager: live monitoring access

| Role | Call and Chat Dashboards | Agents | Calls and Chats | Queue |
|---------------|--------------------------|-------------------------|---|-----------------------------------|
| Manager | All dashboard data | All agent data | All connected, completed, or queued | Access to all queue data |
| Manager-Team | Team specific data only | Team specific data only | Connected, completed, or queued (team-specific) | Access to team specific data only |
| Manager-Data | Team specific data only | Team specific data only | Connected, completed, or queued (team-specific) | Access to team specific data only |
| Manager-Admin | All dashboard data | All agent data | All connected, completed, or queued | Access to all queue data |

Manager: monitoring actions access

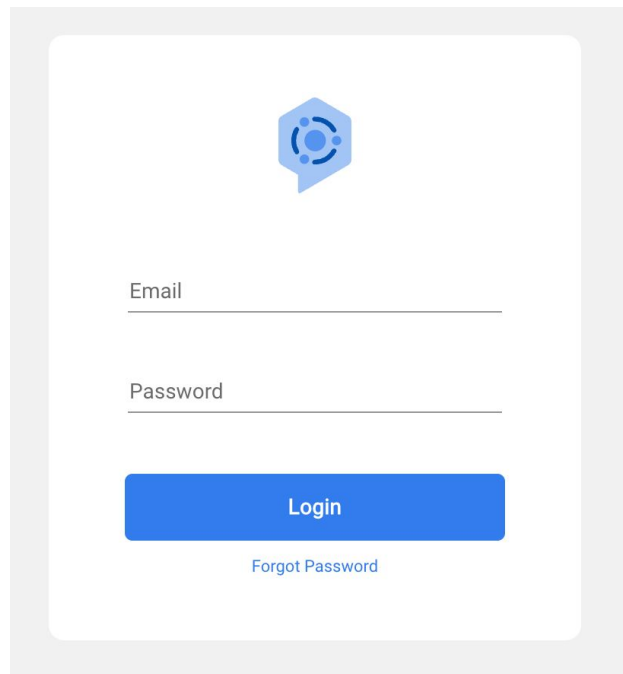
| Role | Reporting |
|---------------|--|
| Manager | Access to reports for all teams and agents |
| Manager-Team | Access to reports for all assigned teams |
| Manager-Data | Access to reports for all assigned teams |
| Manager-Admin | Access to reports for all teams and agents |



Log into CCAIP (via the portal or SSO)

Account setup

- A CCAIP admin will add you to the platform as a manager user.
- You will receive a welcome email.
- Select the link to create your password and activate your account.
- Passwords should be at least 10 characters long, include capital letters, and special characters.
- Upon activation, you will be taken to the CCAIP portal.

A screenshot of a login portal for the CCAIP system. At the top center is a blue hexagonal logo with a white circular icon inside. Below the logo are two input fields: the first is labeled "Email" and the second is labeled "Password". Both fields have horizontal lines indicating where to enter text. Below these fields is a prominent blue rectangular button with the word "Login" in white text. Underneath the button is a smaller, blue, underlined link that says "Forgot Password". The entire login form is set against a light gray background.

Browser settings

Prerequisites

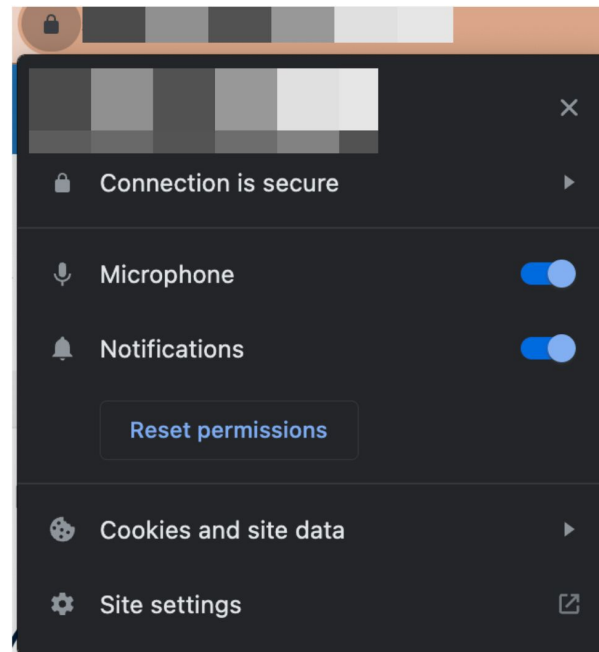
- Google Chrome browser is up to date

Useful tips

- Disable ad blockers
- Do not use full-screen mode in Chrome as it disables browser notifications.
- Click “Forgot Password” to send an email with password change instructions to your manager email address

Browser settings

- 1 Click the padlock icon on the left side of the browser window.
- 2 Toggle the button to the on position to enable microphone use to talk to customers.
- 3 Toggle the button to the on position to enable desktop notifications for incoming calls, chats, and voicemails.



Logging in

Via the platform:

- Navigate to your company's CCAI Platform page. Enter your manager email address and password on the sign-in page and click login.

Via SSO:

- Navigate to your company's CCAI Platform page. Click the "Sign in with SSO" button. Enter your credentials and login.



03




Modify your profile information

Personalize your account

- You can personalize your profile information so that the image and first name shown to customers during support interactions are unique to you.
- Navigate to **Manager > My Profile** to upload a profile picture. *Please note: in some customer configurations, this will be disabled by admins.*

Profile Photo



Select a file to upload

No file chosen

Want to look your best? Make sure to upload a photo that's at least 512px in width and height.

Basic Information

First Name

Jeralyn

Last Name

Abbate

Email Address

jonalyn.abbate@ujet.cx

Verify Current Password

Change Password

Verify Current Password


New Password

Confirm New Password

Personalize your account

- Edit your first and last name.
- You can also verify and change your password in this area of the platform.
- Click “Update” to save all changes.

Profile Photo



Select a file to upload

[Choose File](#) | No file chosen

Want to look your best? Make sure to upload a photo that's at least 512px in width and height.

[Upload Photo](#)

Basic Information

First Name
Jeralyn

Last Name
Abbate

Email Address
jeralyn.abbate@ujet.cx

Verify Current Password

[Update](#)

Change Password

Verify Current Password

New Password

Confirm New Password



Locate CCAIP technical documentation

Documentation and release notes

To access documentation and release notes for CCAIP please access the link below:

<https://cloud.google.com/contact-center/ccai-platform/docs>