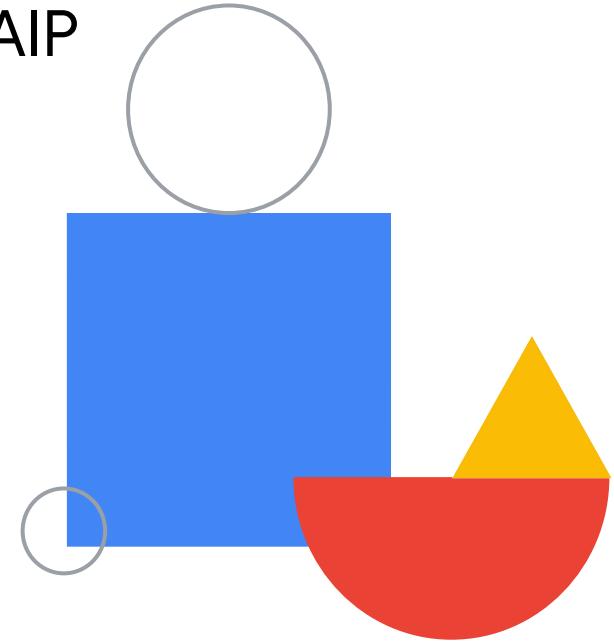


# Module 1: Getting Started with CCAIP



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





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:

Agent

Manager

Manager-Team

Manager-Data

Manager-Admin

Admin

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

# User roles: Agent

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

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

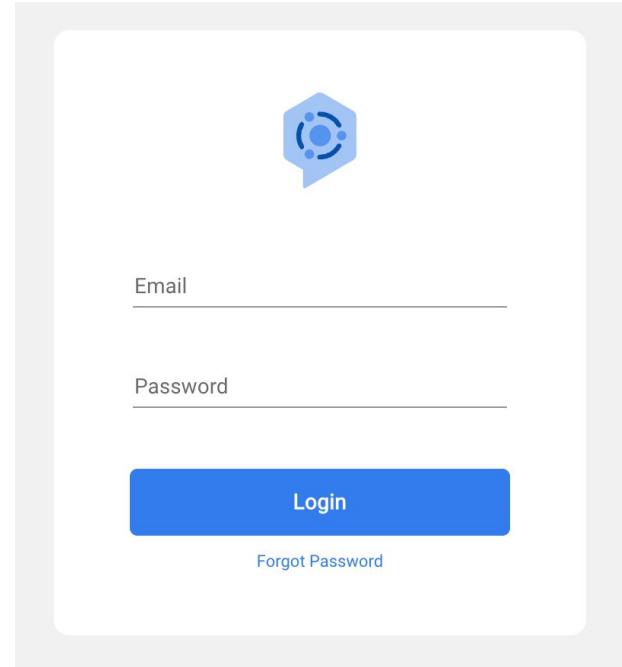
Role	Reporting
Manager	Access to reports for all teams and agents
Manager-Team	Access to reports for all assigned teams
Manager-Data	Access to reports for all assigned teams
Manager-Admin	Access to reports for all teams and agents



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.



# Browser settings

## Prerequisites

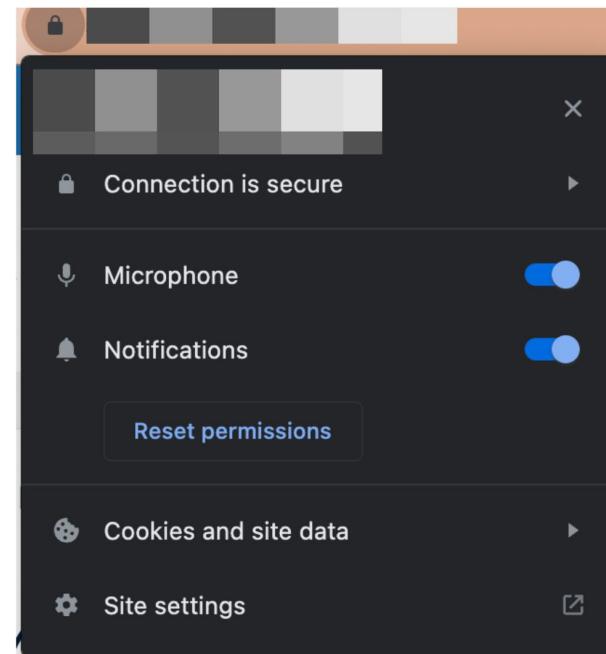
- Google Chrome browser is up to date

## 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  
 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**

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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.

Basic Information

First Name  
Jeralyn

Last Name  
Abbate

Email Address  
jeralyn.abbate@ujet.cx

Verify Current Password

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>