



# The Low-Risk Transition to Webex Contact Center

## Transition Methodology

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CCBU

April 2023

# Let's take a quick survey



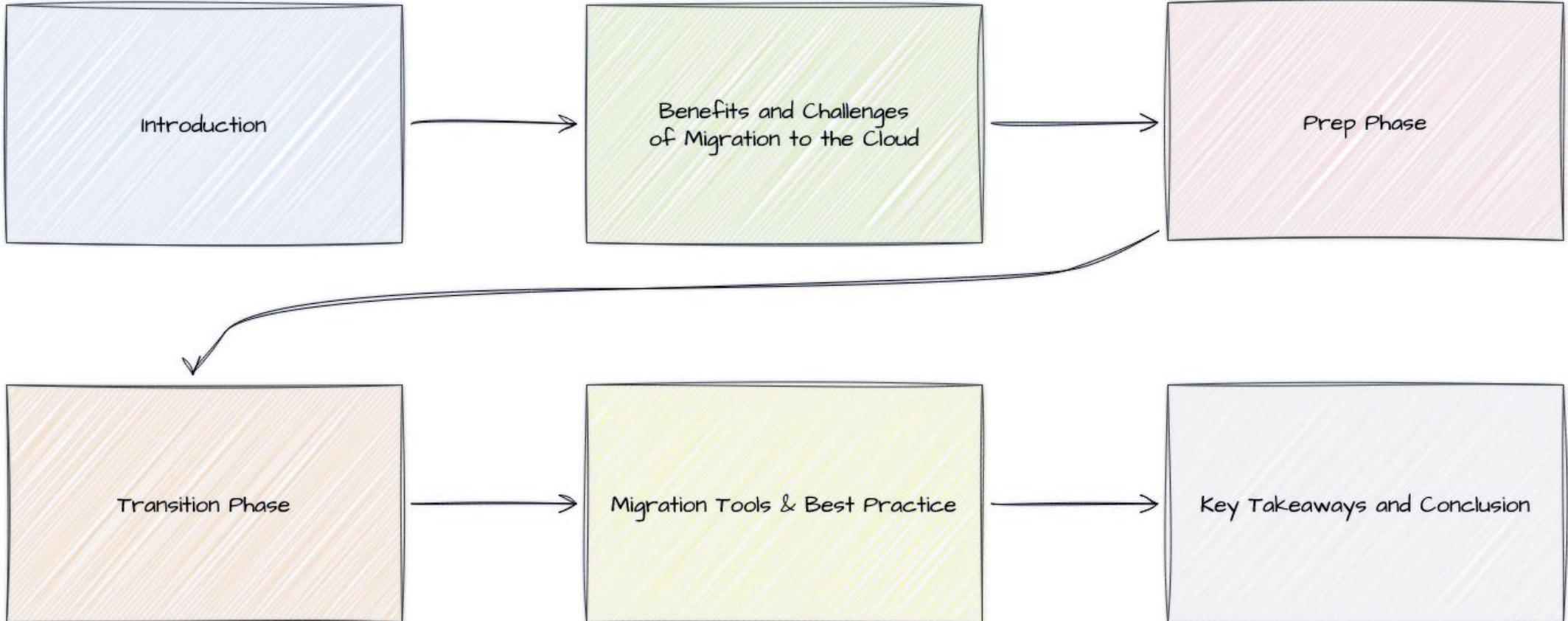
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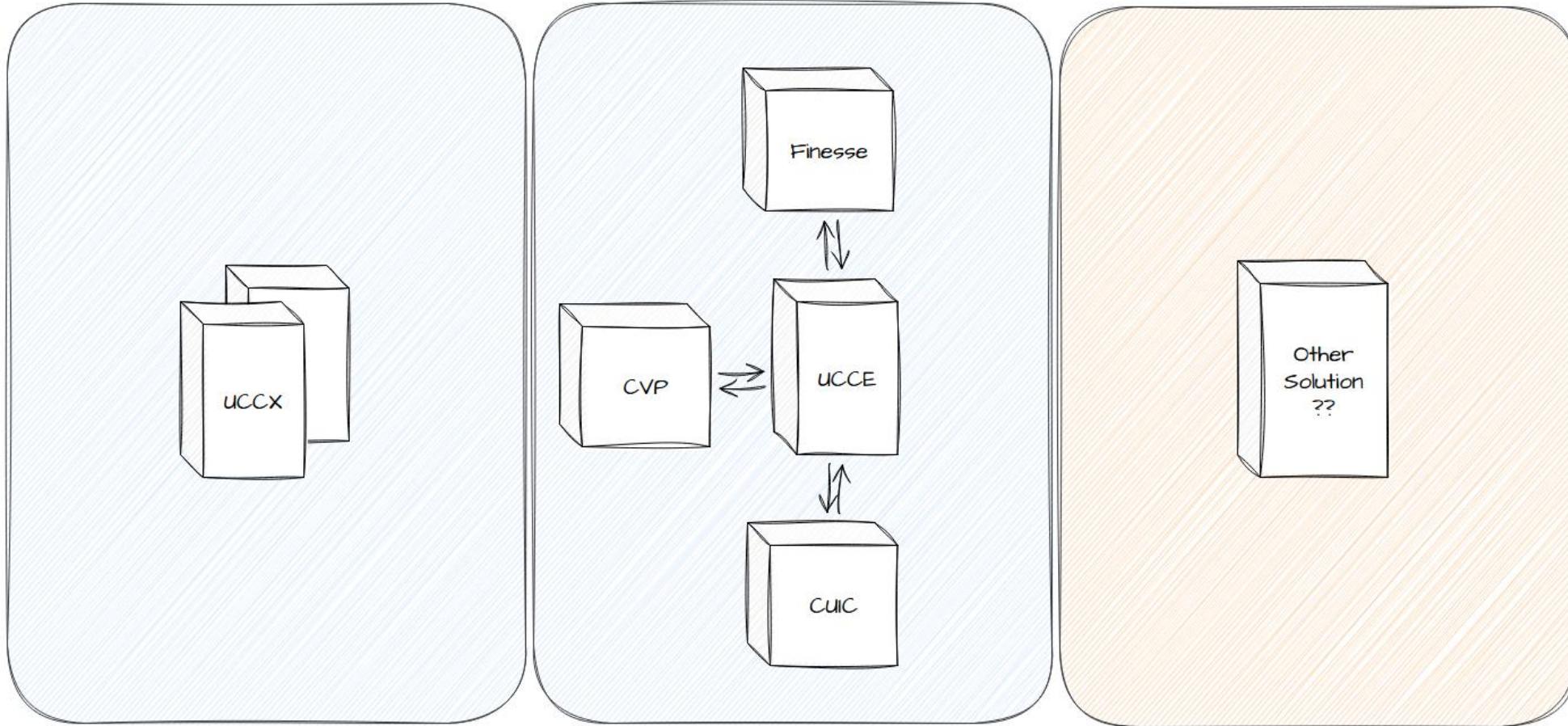
Join at  
**slido.com**  
**#1832 362**

Passcode:  
**pguj01**

# Agenda



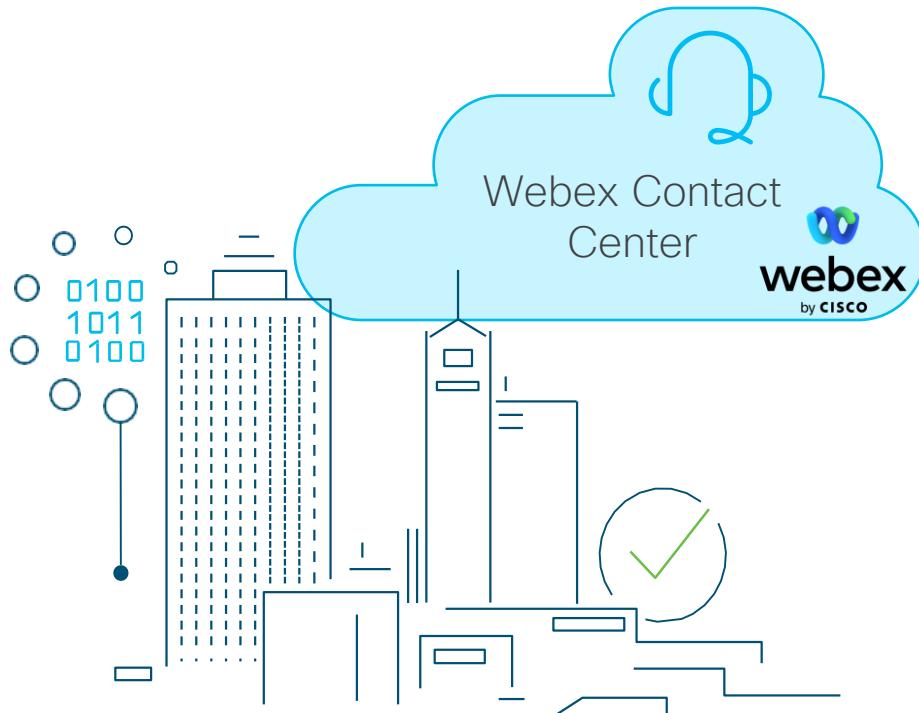
# Where are we migrating from?



# Introduction



# Benefits of moving your contact center to the cloud

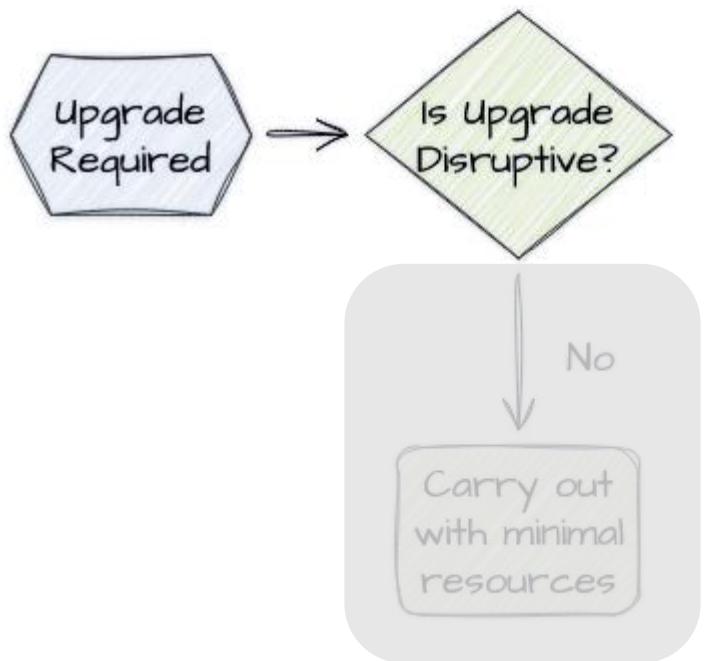


## Faster deployment of new services

- Frequent updates to latest features
- No IT planning required
- No disruption to your employees

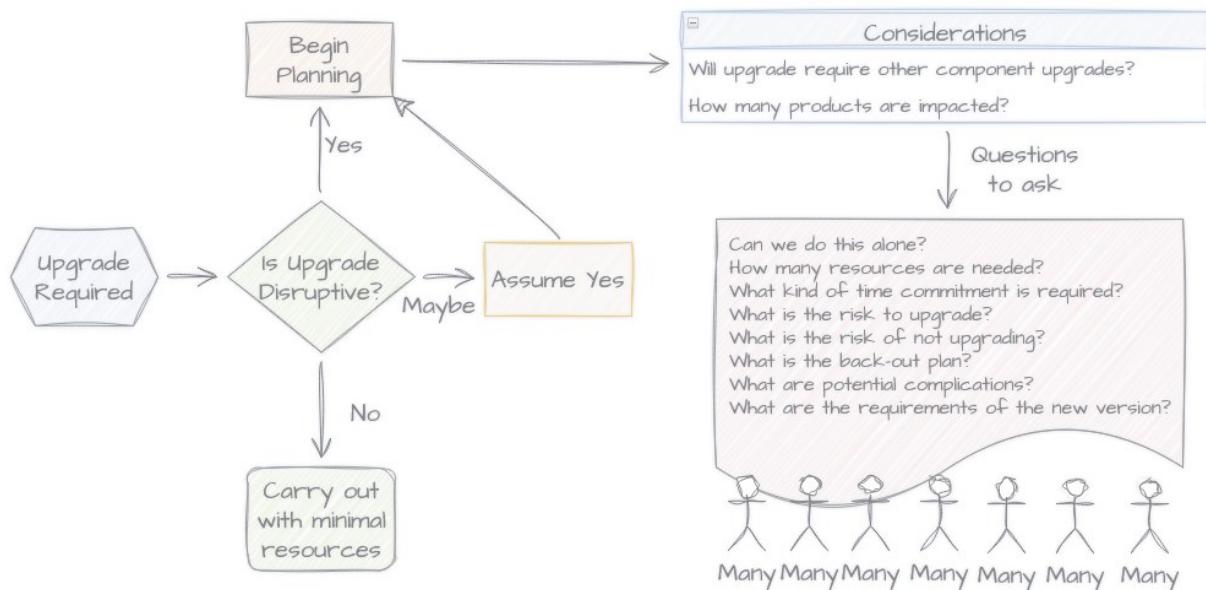
## Reduced costs

- More predictable costs, simplified TCO
- Reduced capital outlays, more accurate budgeting
- Pay for what you use





## Webex Contact Center



Upgrades happen automatically, after hours, and any features are available immediately if GA or by flag enablement if EFT.

# Benefits of moving your contact center to the cloud



## Faster deployment of new services

- Frequent updates to latest features
- No IT planning required
- No disruption to your employees

## Improved agility and access

- Faster adoption of customer experience innovation
- Unlock scale and work from anywhere
- Integration with major cloud apps
- Work-from-anywhere with collaboration innovation

## Higher security measures

- Strict regulatory and legal compliance
- Cisco-trusted security standards and investment
- SSO, VPN work-from-home

## Reduced costs

- More predictable costs, simplified TCO
- Reduced capital outlays, more accurate budgeting
- Pay for what you use

## Easier solution management

- More time strategically innovating vs. fixing
- Exit from staffing upgrades, patching, support
- Simplified infrastructure
- Centralized administration

But ... what do you think the most challenging item in technology migration?



Organization Challenges

# Challenges

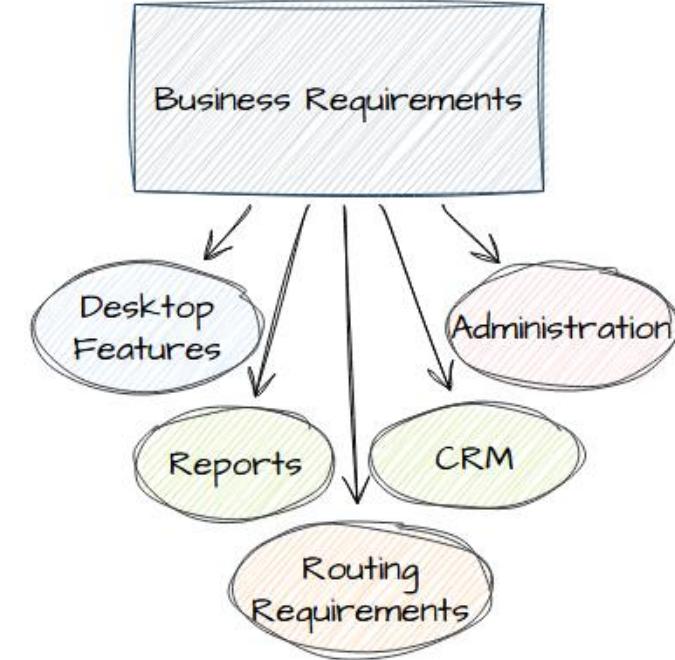
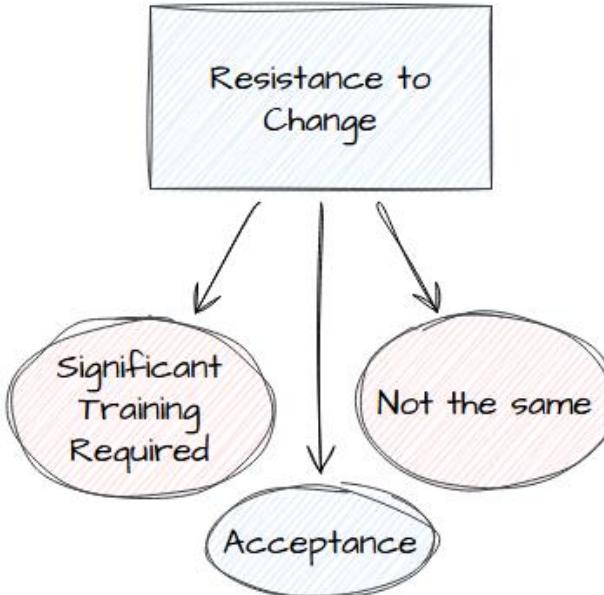
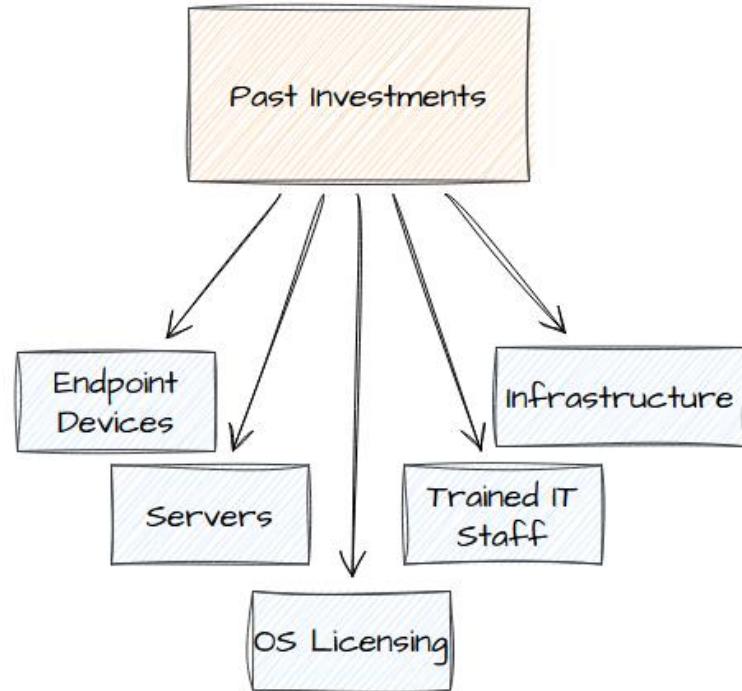
Past Investments

Resistance to Change

Business Requirements

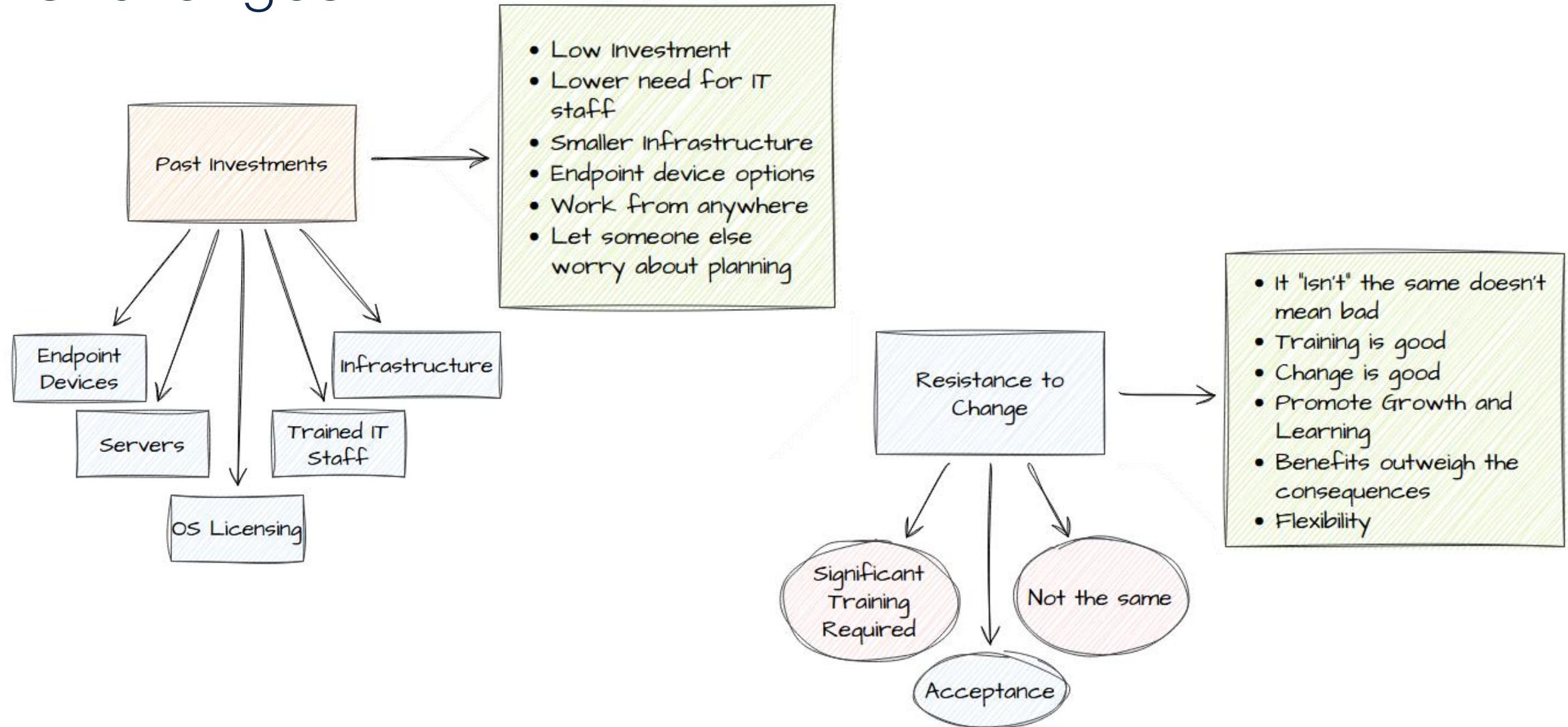
- May create the feeling of a “Loss of Control”
- Customer may think there is excessive uncertainty
- Unwelcome surprises
- Resistance to change (<https://hbr.org/2012/09/ten-reasons-people-resist-change.html>)

# Challenges

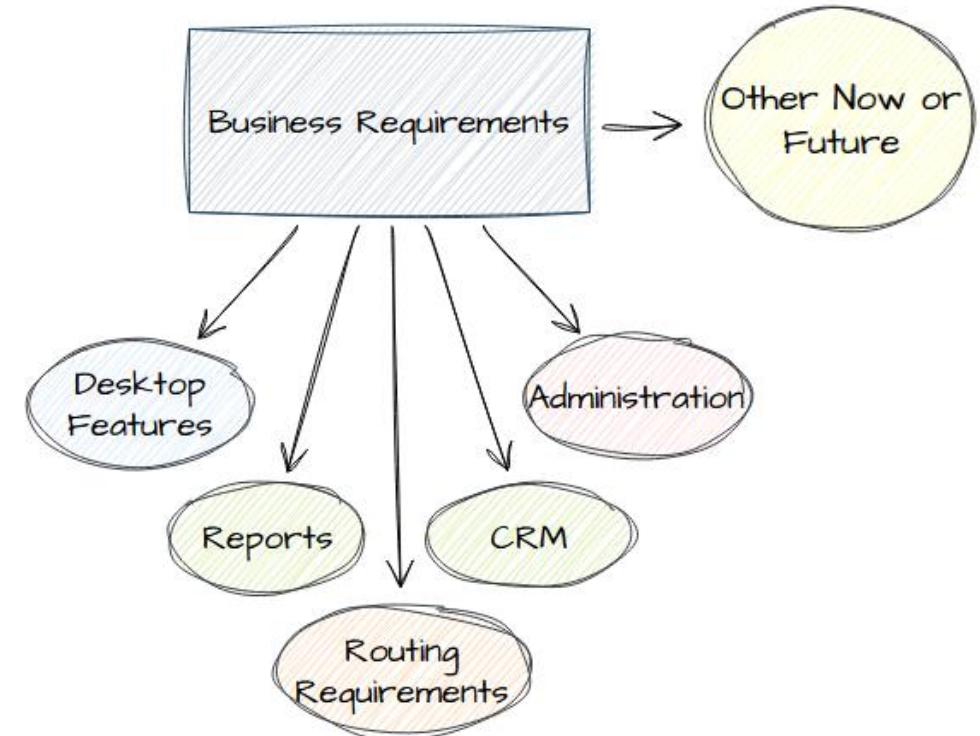


- May create the feeling of a “Loss of Control”
- Customer may think there is excessive uncertainty
- Unwelcome surprises
- Resistance to change (<https://hbr.org/2012/09/ten-reasons-people-resist-change.html>)

# Challenges



# Challenges



# Moving?



# Check List

Set dates to turn utilities on and off at the new and old house.

	NEW	OLD
WATER	<input type="checkbox"/>	<input type="checkbox"/>
GAS	<input type="checkbox"/>	<input type="checkbox"/>
INTERNET	<input type="checkbox"/>	<input type="checkbox"/>
WASTE	<input type="checkbox"/>	<input type="checkbox"/>
ELECTRICITY	<input type="checkbox"/>	<input type="checkbox"/>
CABLE	<input type="checkbox"/>	<input type="checkbox"/>
LANDLINE	<input type="checkbox"/>	<input type="checkbox"/>

## UTILITIES

## CHANGE ADDRESS

- POST OFFICE
- SUBSCRIPTIONS
- BANK
- PHONE
- EMPLOYER
- STUDENT LOANS
- CAR INSURANCE
- HOME/RENTER INSURANCE
- HEALTH INSURANCE
- VOTER REGISTRATION
- STREAMING SERVICES

HIRE RENTERS/RENT MOVING VAN

CREATE BINDER TO TRACK MOVE

CREATE HOME INVENTORY LIST

REQUEST TIME OFF AT WORK

PACK, THROW AWAY AND DONATE ITEMS

ARRANGE PLANS FOR PETS AND PLANTS DURING MOVE

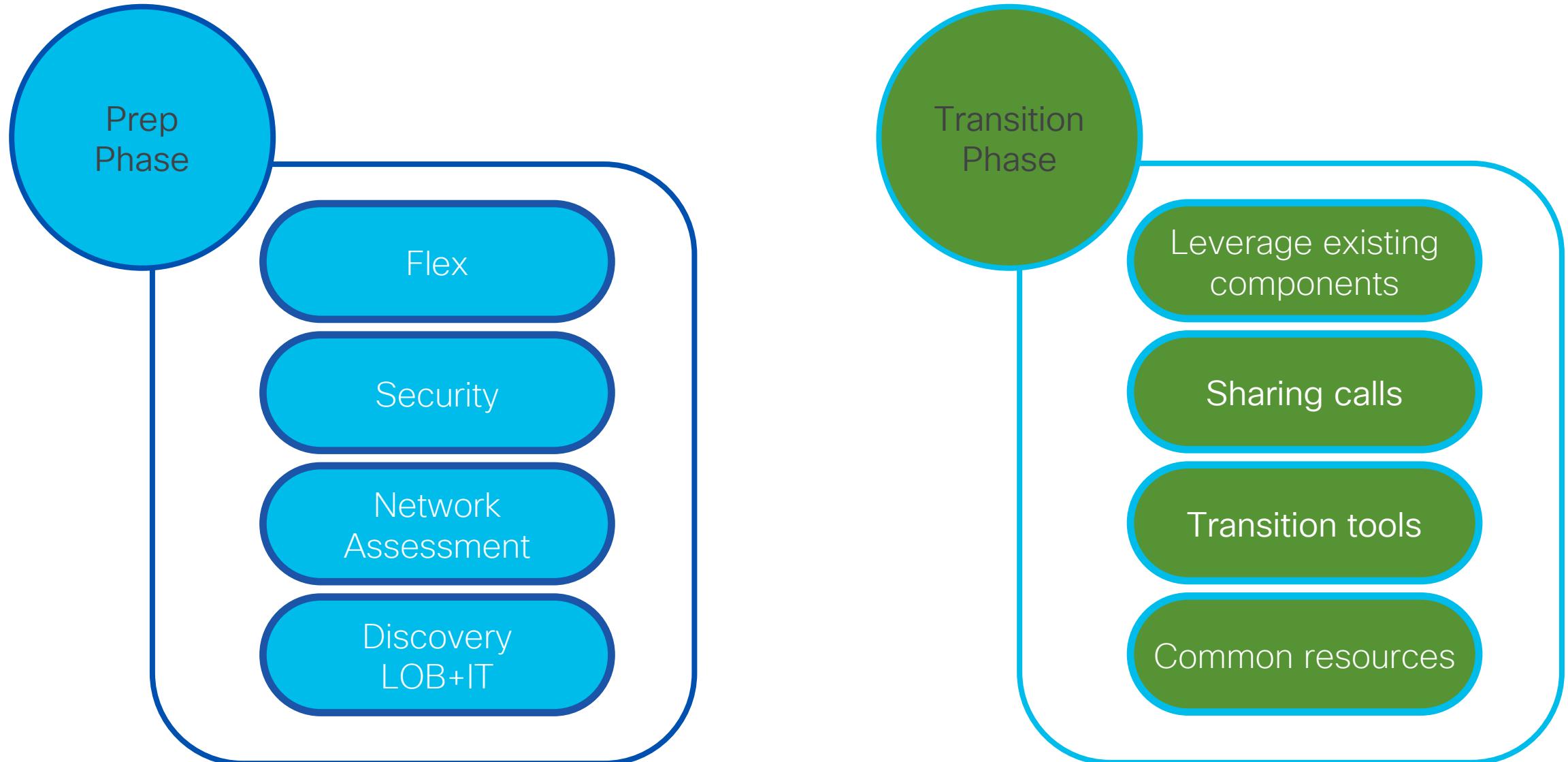
MAKE PLANS FOR CHILDREN'S SCHOOL

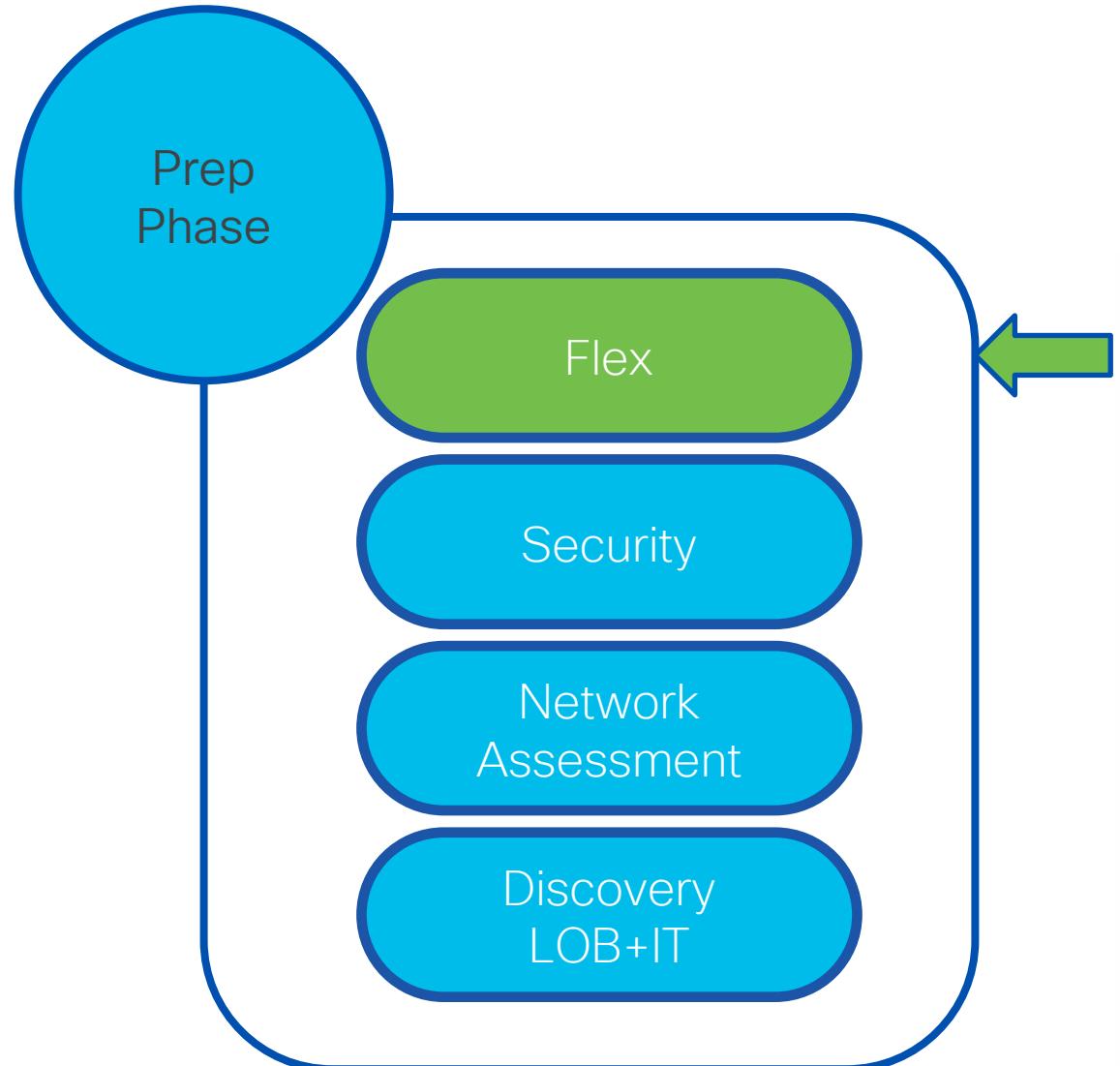
EAT WHAT'S IN FRIDGE/PANTRY

SCHEDULE CLEANING SERVICE

## OTHER

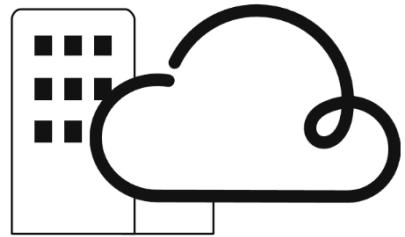
# Transition Phases





# Flex For Contact Center

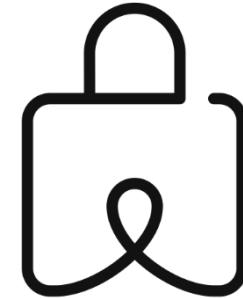
Cloud and on-premises



Subscription



Investment Protection

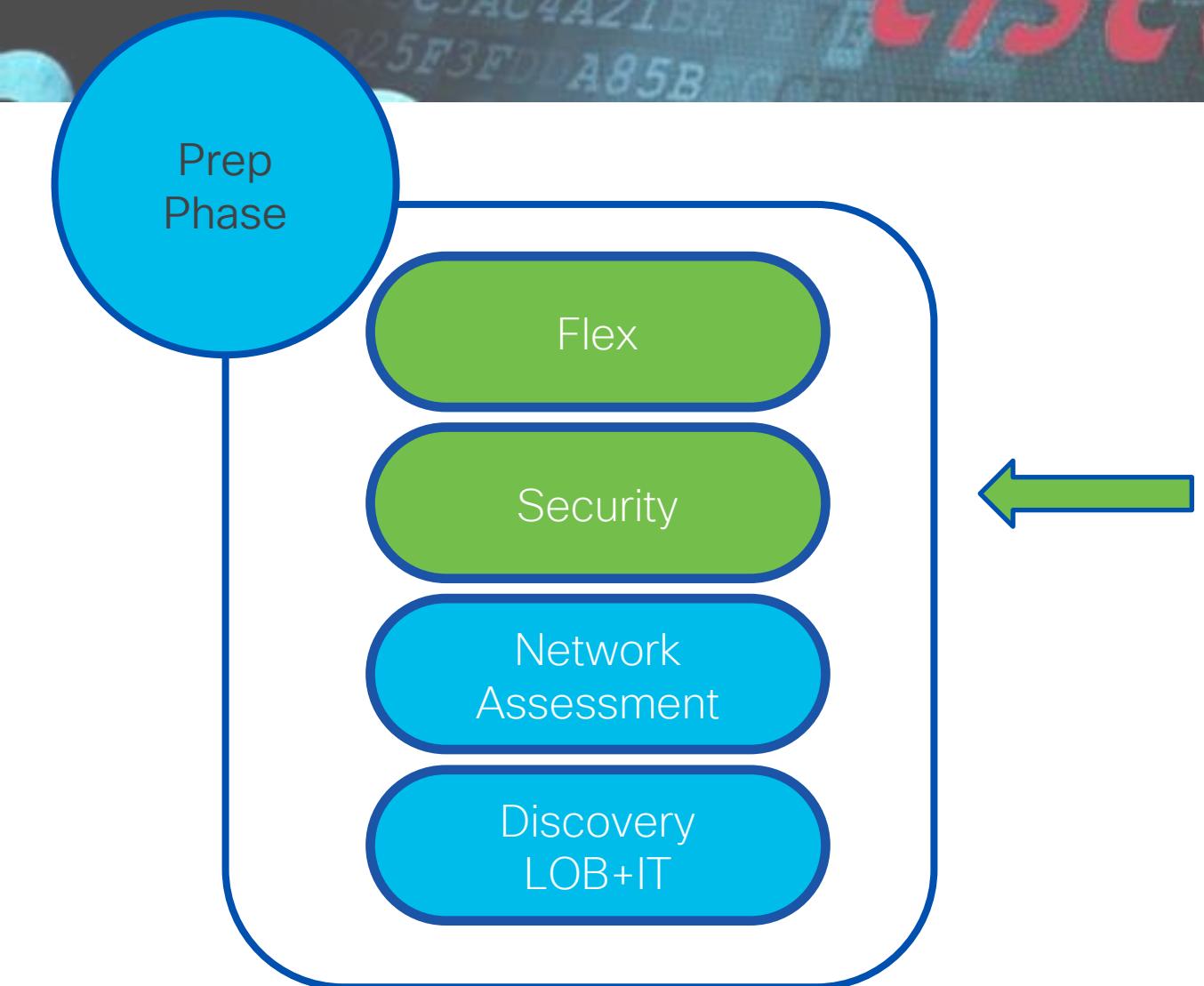


Subscribe once, deploy  
and grow [how you want](#)

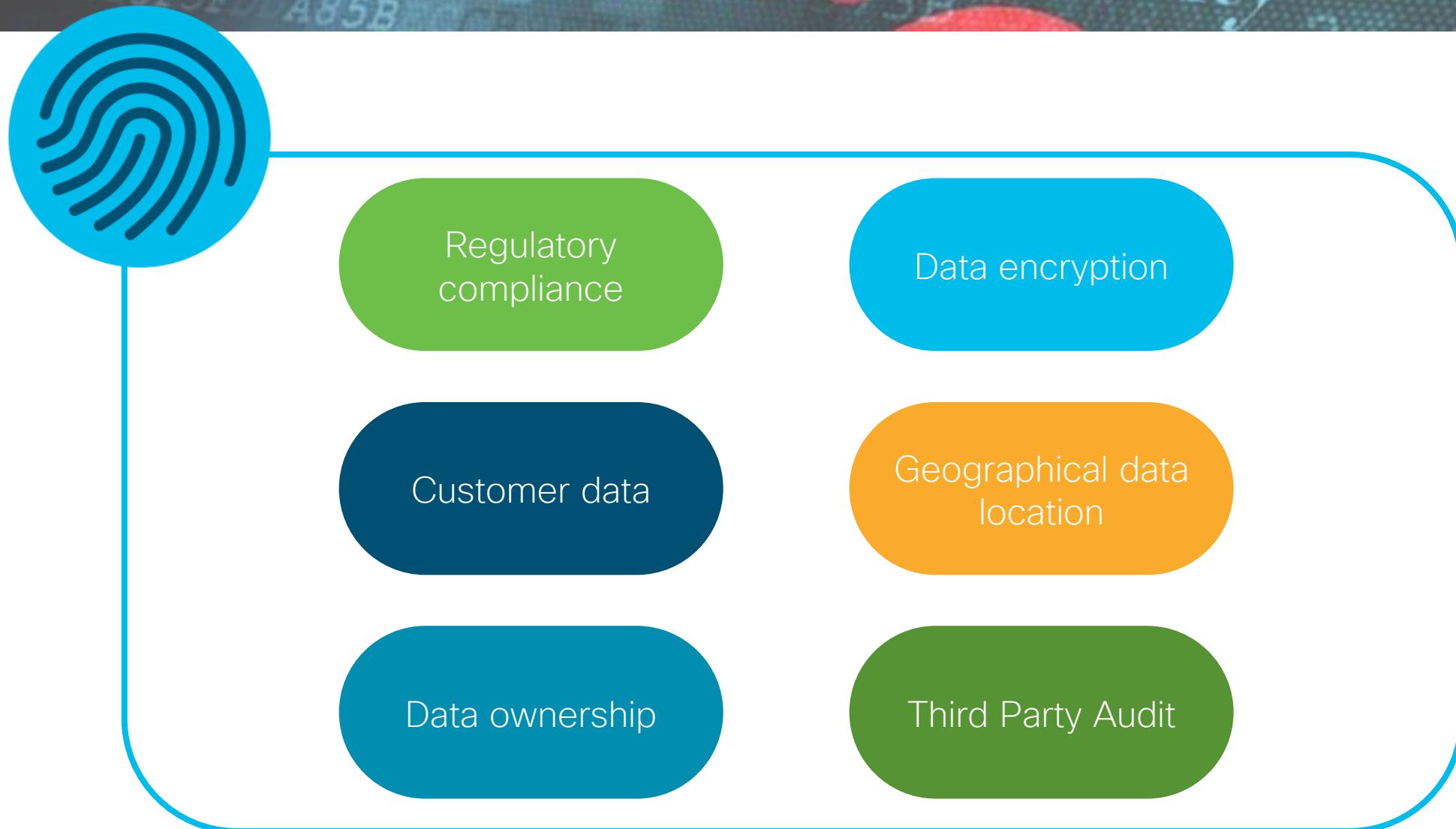
Easy OpEx budgeting via  
[a single subscription](#)

Migration of installed base  
via [Flex Plan](#)

The Contact Center Flex Plan offers a term-based subscription model  
to increase choices and remove barriers for migrating to the cloud



# Engage your security and risk team!



# Security is Shared Responsibility!

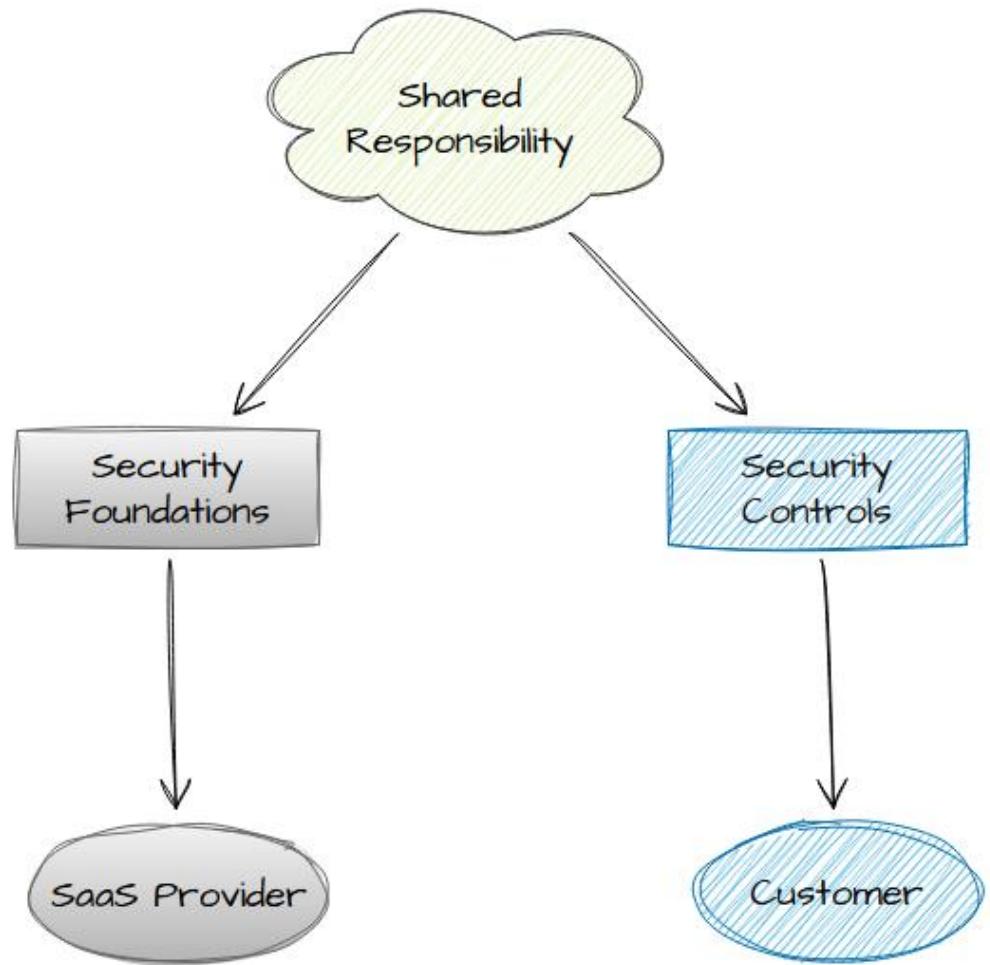


SaaS Provider



Customer

# Premise vs Cloud Security



Responsibility	On-Prem	IaaS	PaaS	SaaS
Data classification & accountability	Blue	Blue	Blue	Blue
Client & end-point protection	Blue	Blue	Blue	Blue
Identity & access management	Blue	Blue	Blue	Blue
Application level controls	Blue	Blue	Blue	Blue
Network controls	Blue	Blue	Gray	Gray
Host infrastructure	Blue	Blue	Gray	Gray
Physical security	Blue	Gray	Gray	Gray

Legend: Blue square = Cloud Customer, Gray square = Cloud Provider

Fig. 1: Shared Responsibility in the Cloud, source: Microsoft

# More security information

- Webex Contact Center Security White paper
  - <https://www.cisco.com/c/en/us/products/contact-center/webex-contact-center/white-paper-listing.html>
- Cisco Trust Portal
  - <https://trustportal.cisco.com/c/r/ctp/trust-portal.html?solutioncategory=Collaboration>
- Trust Portal: Customer Invite Demo
  - <https://salesconnect.cloudapps.cisco.com/vid/index.html?cid=7bc82826-eb3c-423a-8a58-e9807bc973ed>



# Security Settings for Webex Contact Center

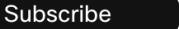
[help.webex.com](https://help.webex.com) > "Security Settings"

Content Security  
Settings

On-Premise Firewall  
settings

WebexCC Source IP  
Addresses

Allow-listing Domains

Product: Webex Control Hub, W... Operating System: Web Browser For: Administrator, Custom...  

Mar 4, 2022 | 2641 view(s) | 17 people thought this was helpful

## Security Settings for Webex Contact Center

You can use this article to set up Security Settings for Webex Contact Center.

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Enable or Disable Privacy Shield for Call 

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Enable or Disable Attachments for Chat and Email 

---

Configure Redact and Drop for Chat and Email 

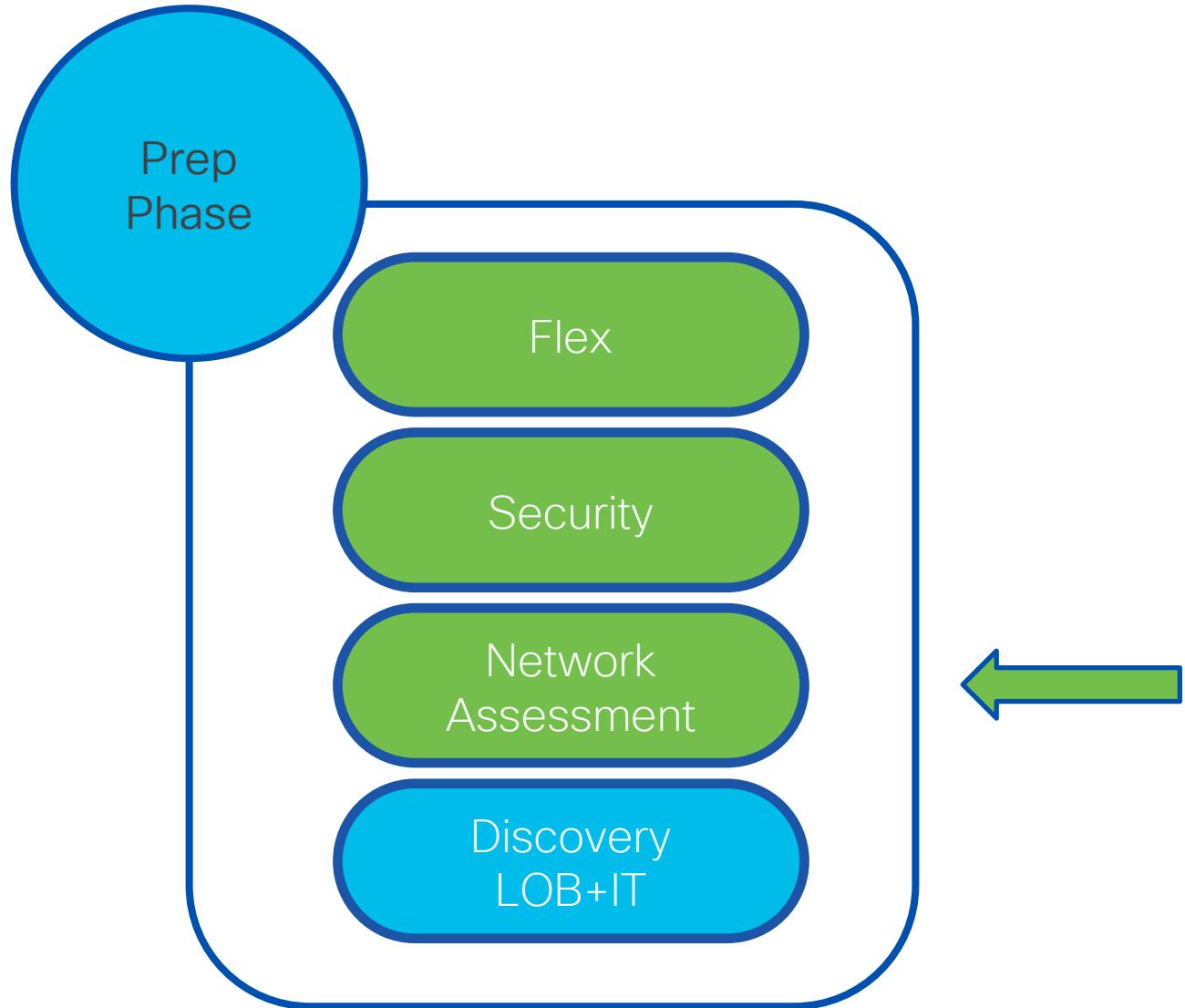
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Content Security Policy for Webex Contact Center 

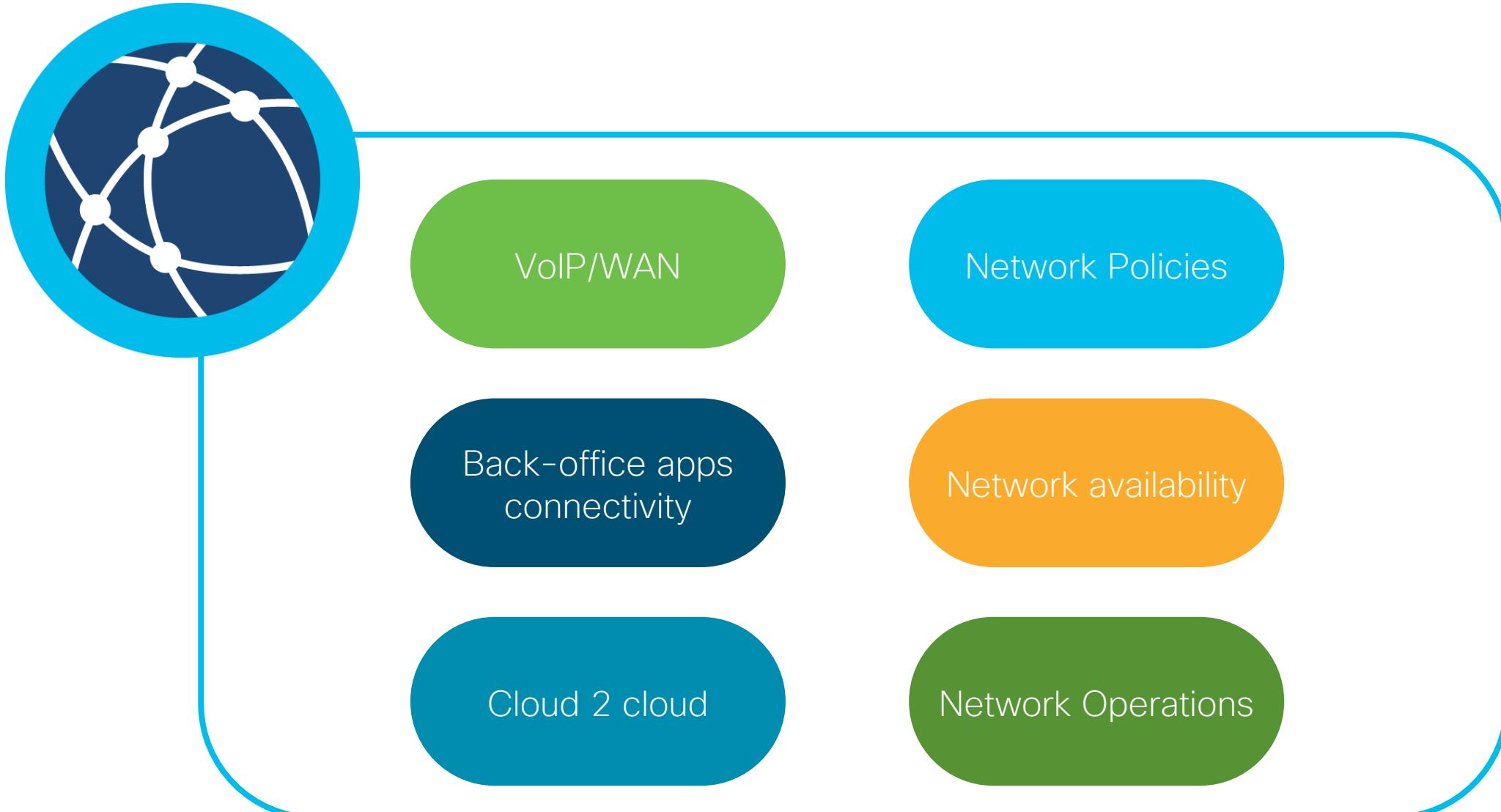
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Source IP Addresses for Webex Contact Center 

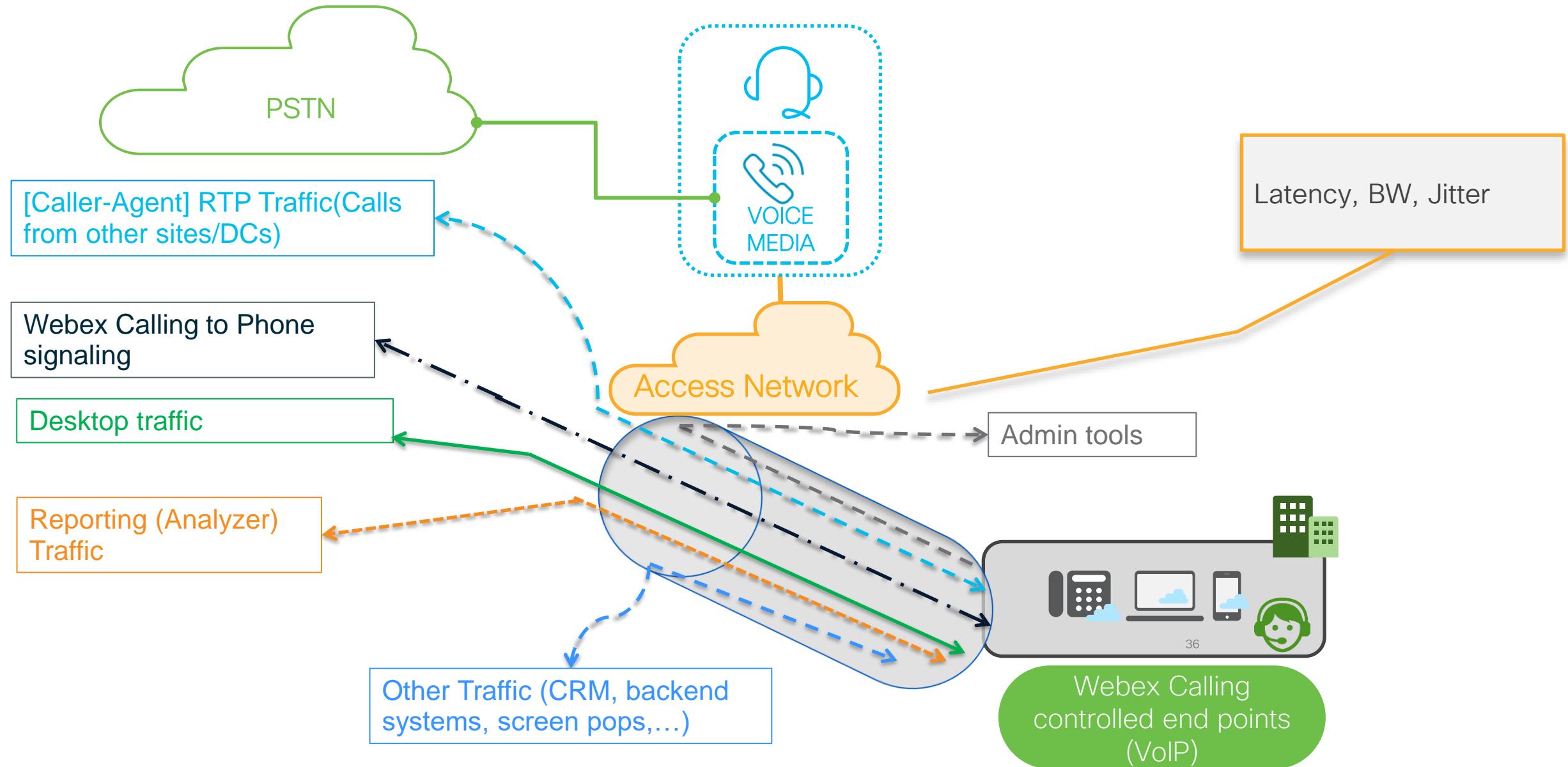
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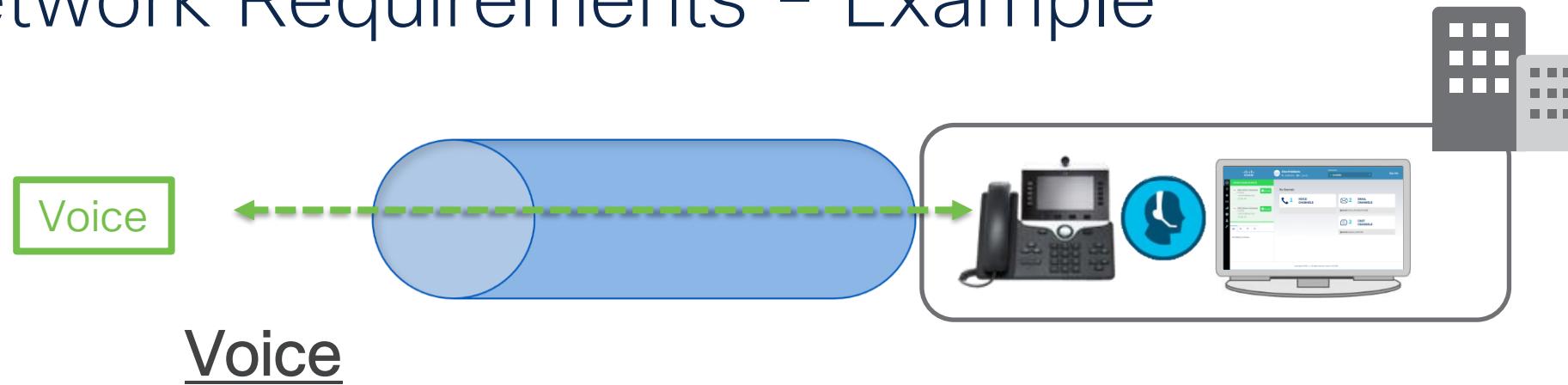
# Conduct a network assessment/evaluate the new design



# Network Requirements – Example



# Network Requirements - Example



- VoIP industry standards:
  - Latency: < 150ms end-to-end
  - Jitter: < 30ms
  - Packet loss: < 1%

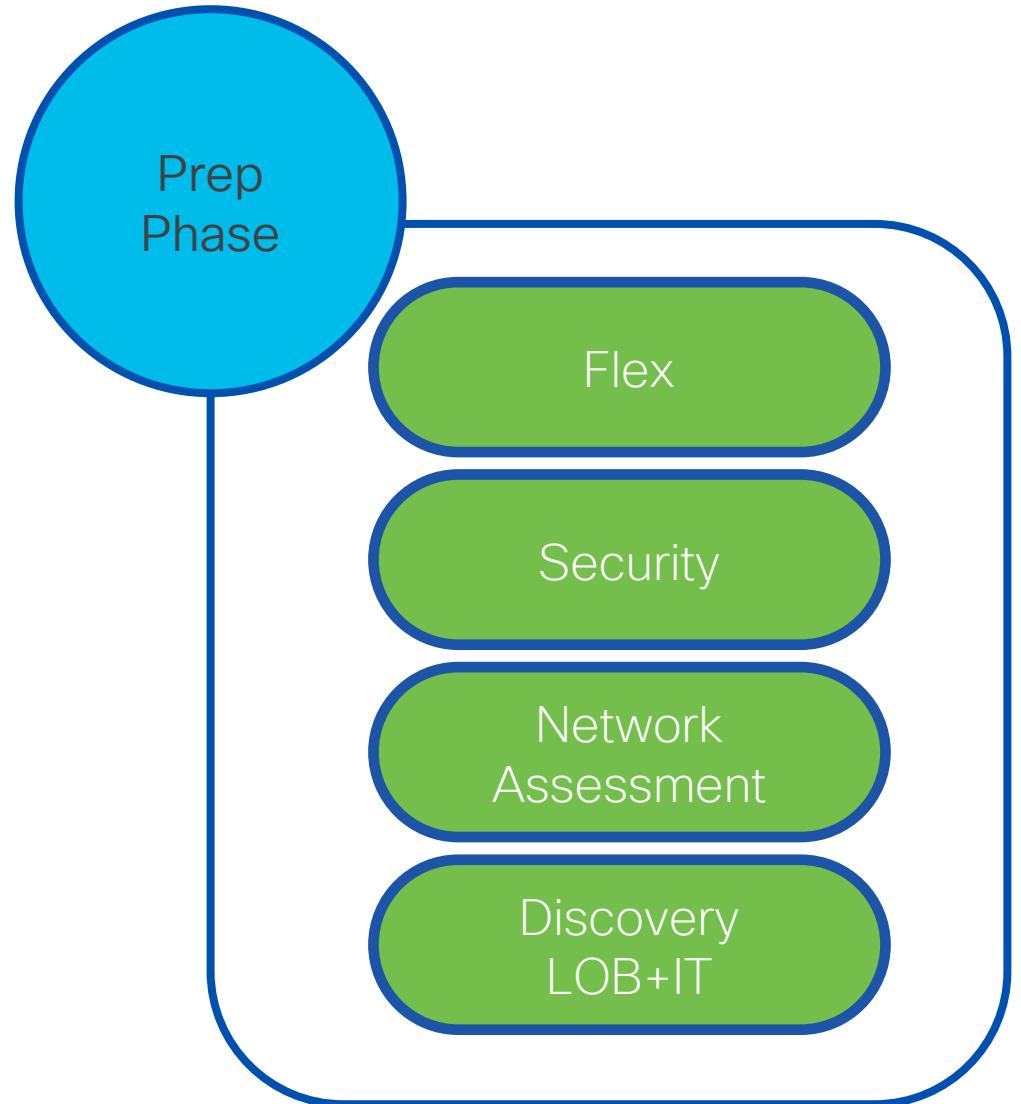
	Good	Fair	Poor
Delay	<=100ms	100~300ms	>300ms
Bandwidth	>=2Mbps	100Kbps~2Mbps	<100Kbps
Lossrate	<=1%	1%~20%	>20%



Webex Network Test: <https://mediatest.ciscospark.com/>

Webex Network Requirements:

<https://collaborationhelp.cisco.com/en-us/article/WBX000028782/Network-Requirements-for-Webex-Services>



# Discovery



# Business vs. End Customer



of businesses believe they deliver a superior experience...

of their customers agreed



Wrong move!



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67%

Of customers favorably view brands that engage in **proactive** customer service.<sup>1</sup>

68%

Of customers prefer **digital engagement** channels such as chat, text, and social to a phone call.<sup>2</sup>

77%

Of customers favor **intelligent self-service** after trying it during the pandemic.<sup>3</sup>

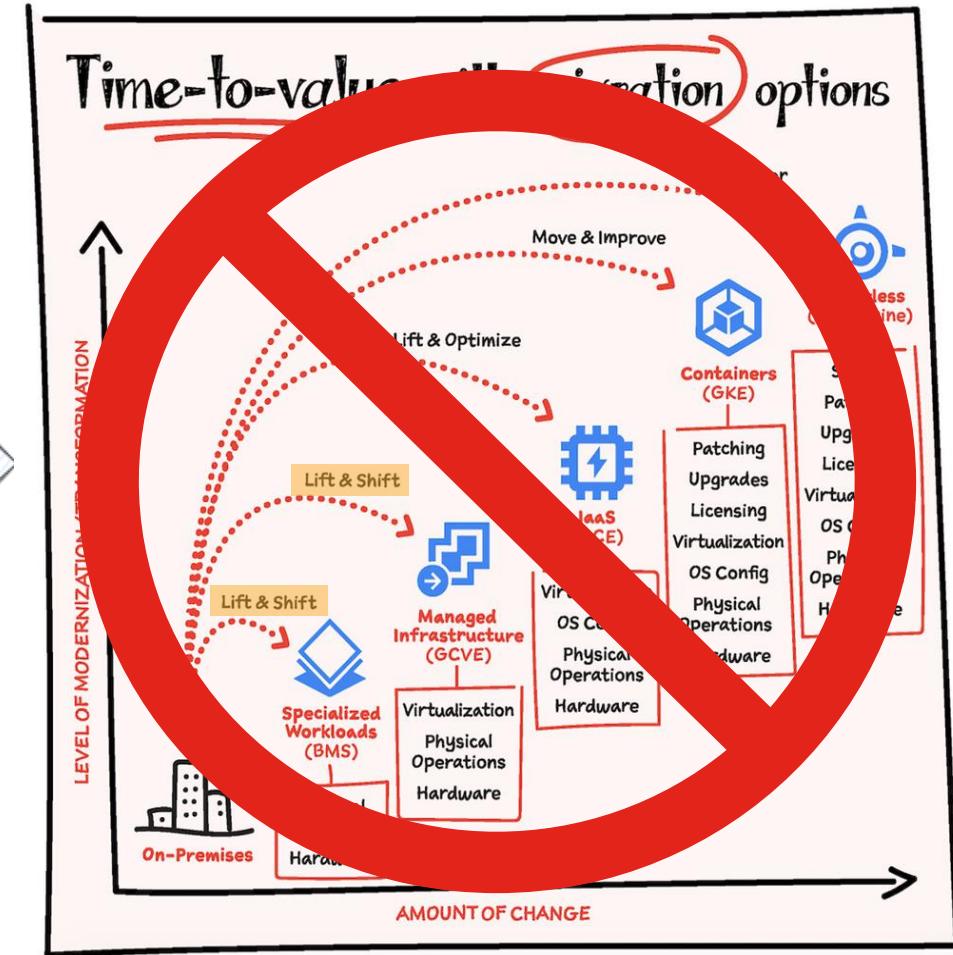
66%

Of customers expect companies to understand and **personalize engagement** for their unique needs.<sup>4</sup>

<sup>1</sup> Microsoft – “Global State of Customer Service”; <sup>2</sup> OnDevice Research; <sup>3</sup> Northridge Group – 2020 State of Customer Service Experience Report; <sup>4</sup> Salesforce “State of the Connected Customer, 4th Edition”

# Business goals & IT alignment

- Assess your current contact center, see what it does well and what needs improving to meet the required business outcomes
- IT will need to be more engage with the business and go beyond setting up infrastructure
- Technology should be viewed to **enable** business strategic goals/business outcomes
- Working together to build a roadmap for the future of your contact center to meet the desired business outcomes
- Translate the roadmap into contact center capabilities



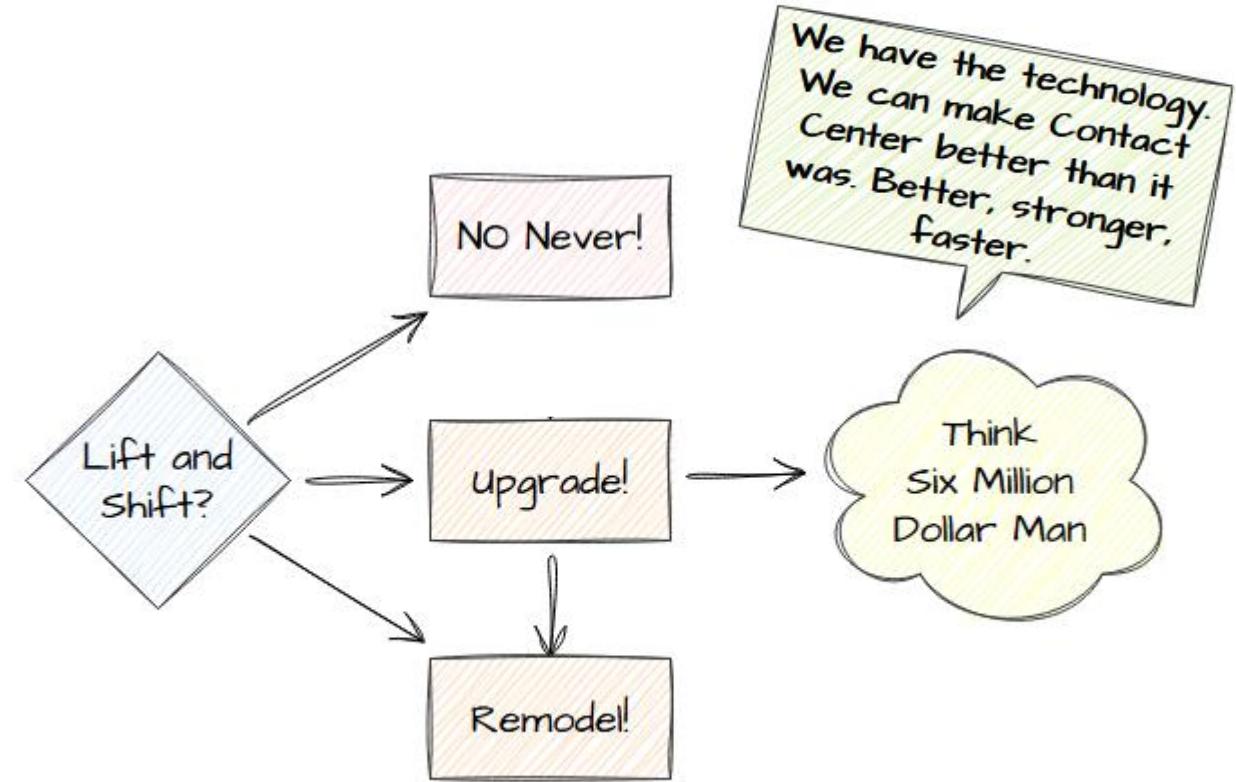
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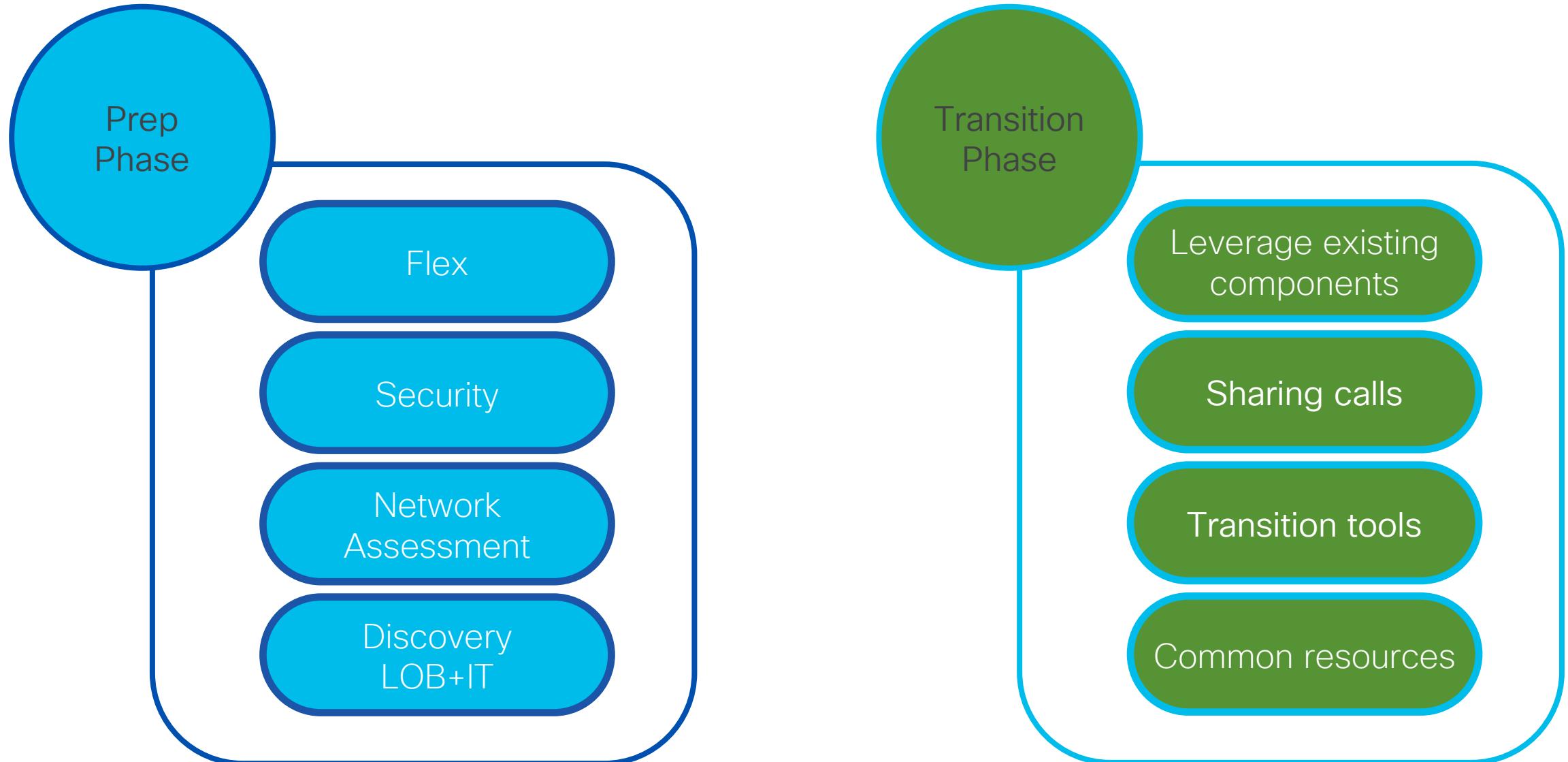


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# Transition Phases



# Transition Phase





## Transition Phase

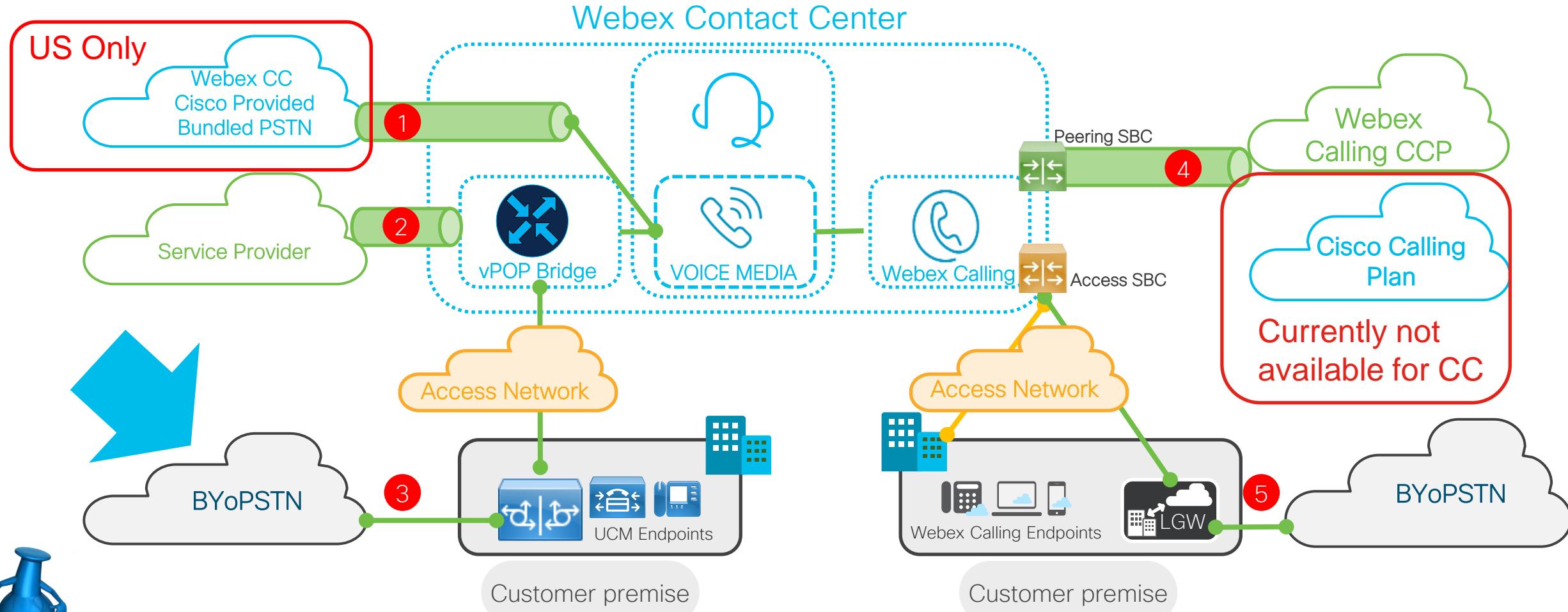
Leverage existing components

Sharing calls

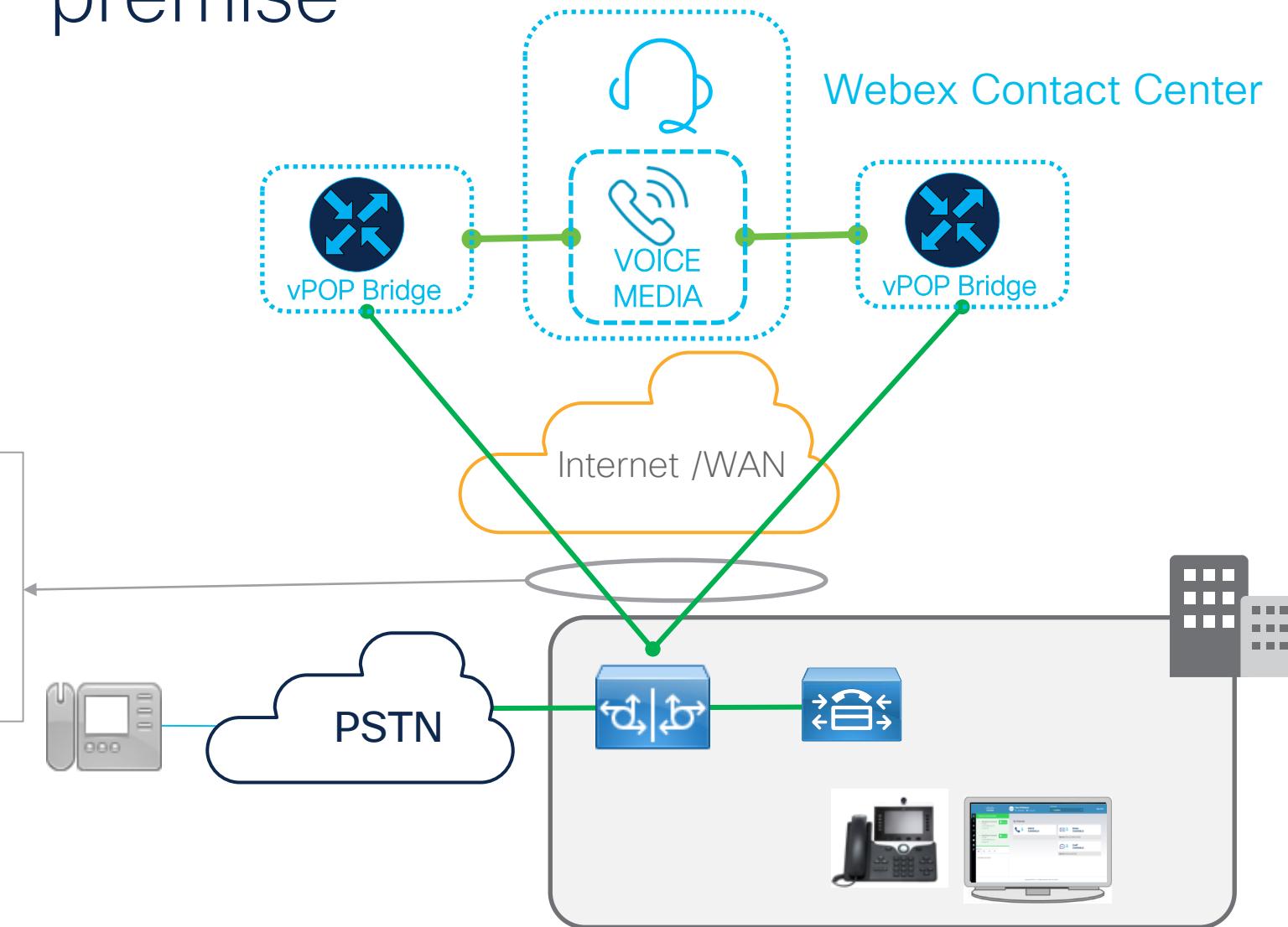
Transition tools

Common resources

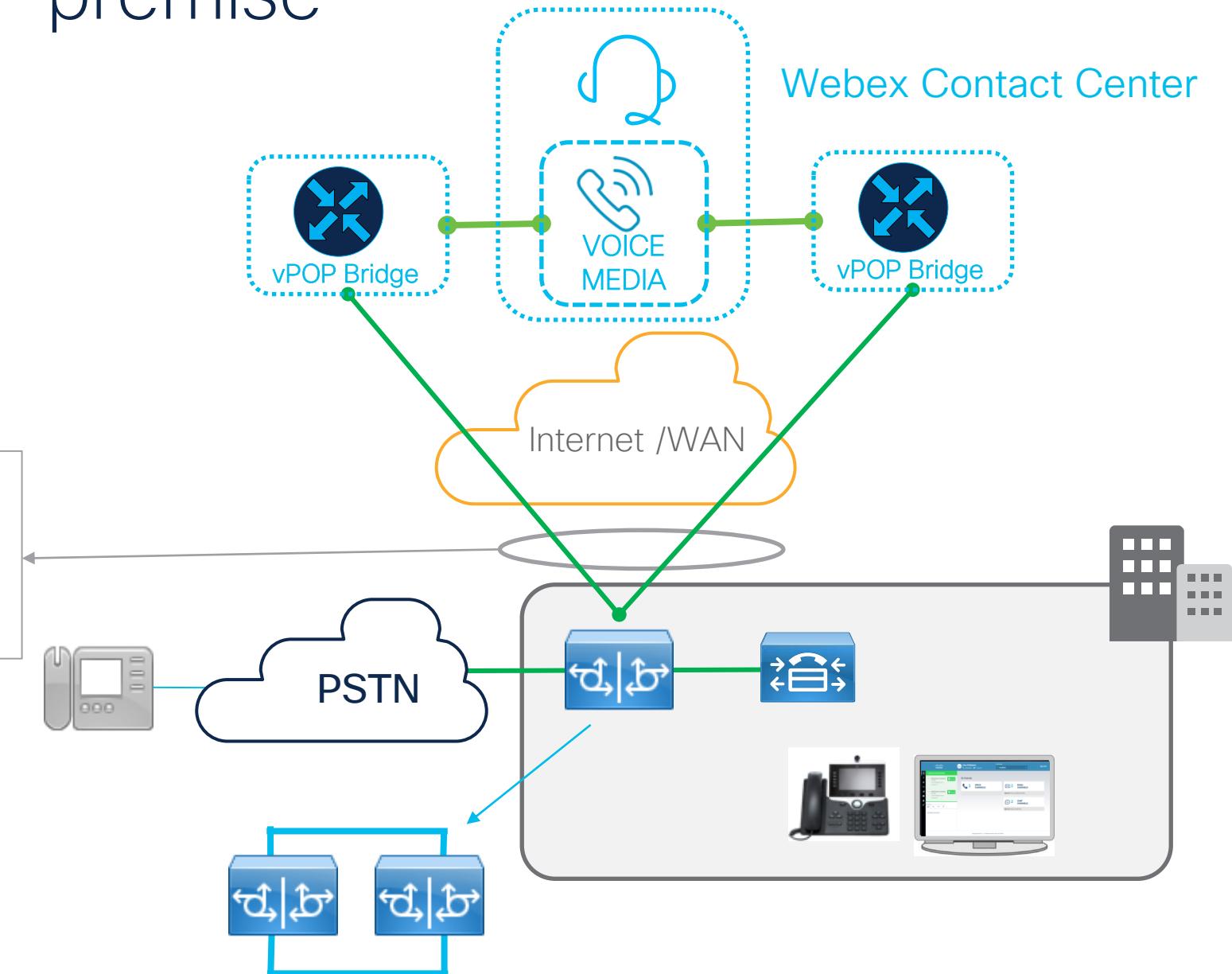
# Webex Contact Center

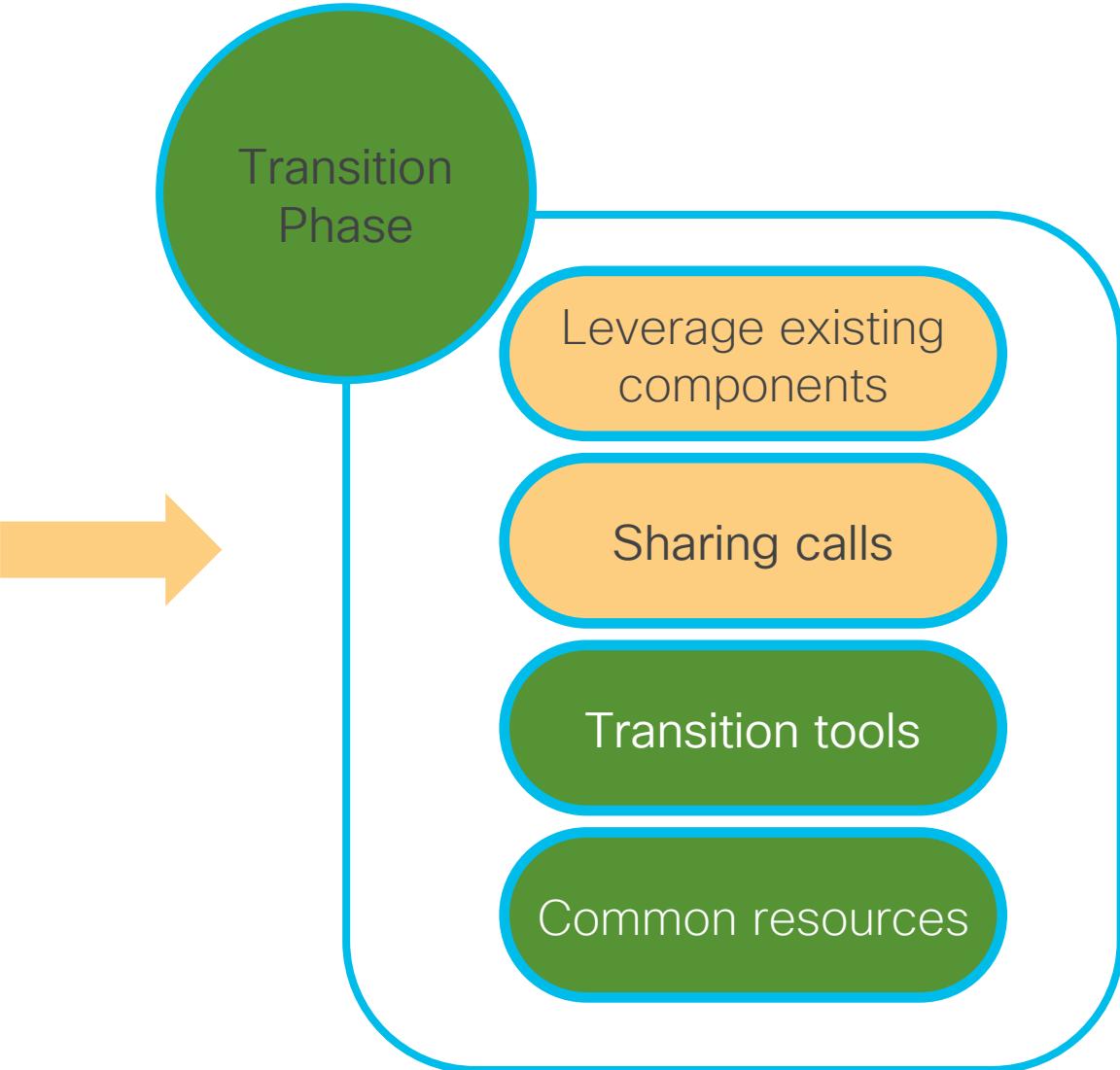


# Integration with on-premise

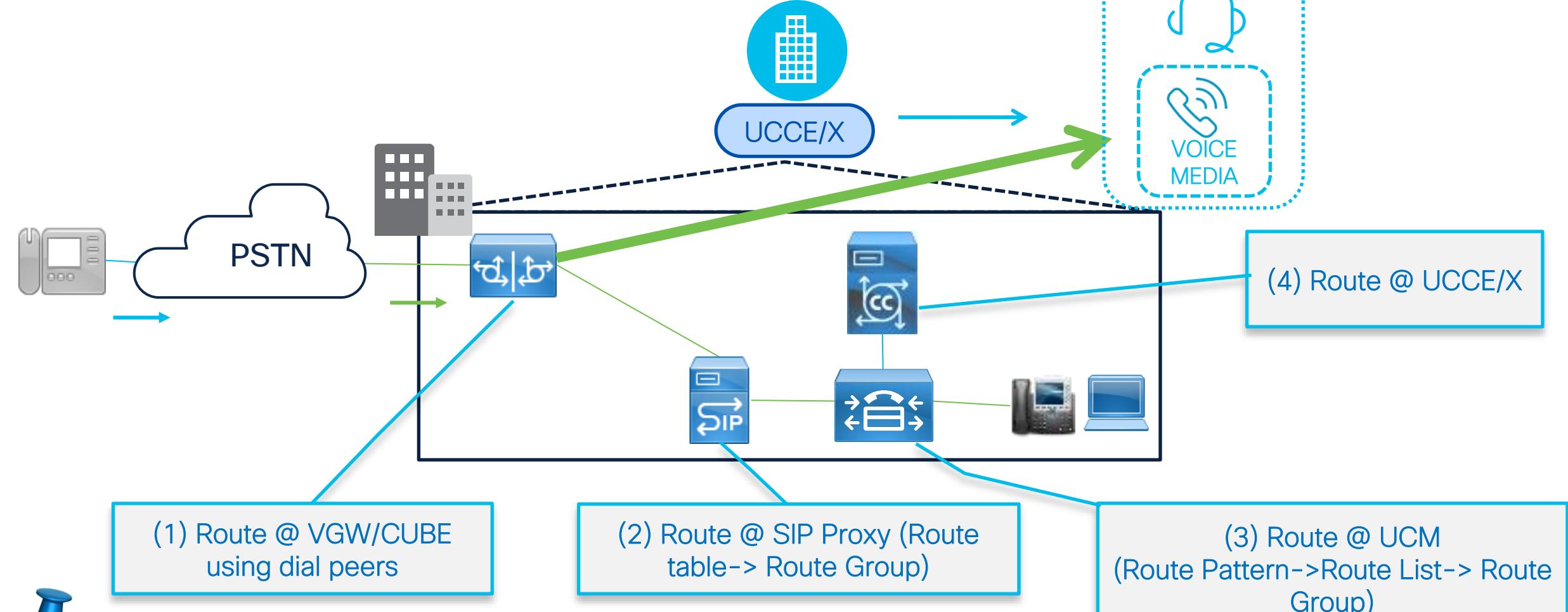


# Integration with on-premise



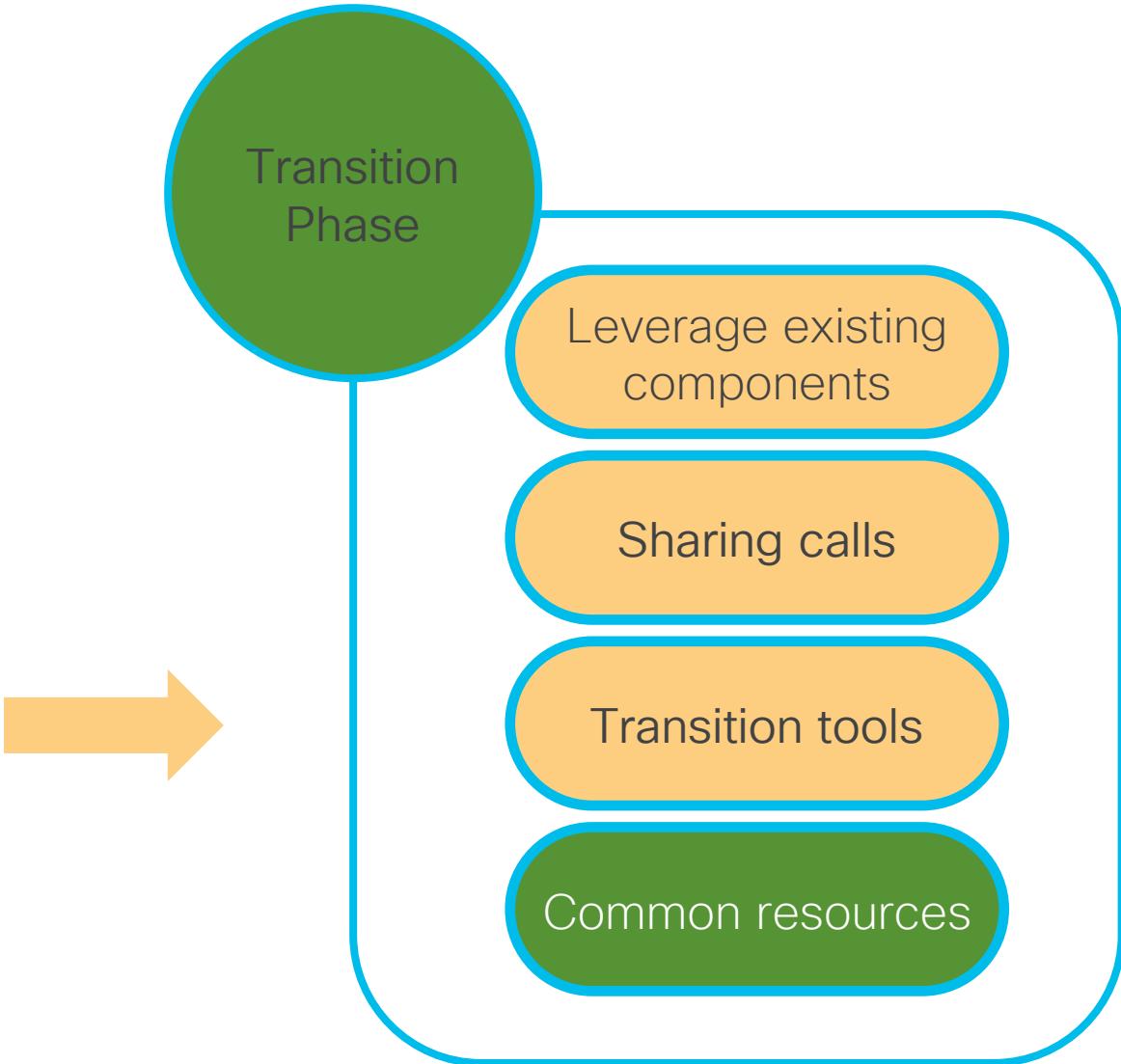
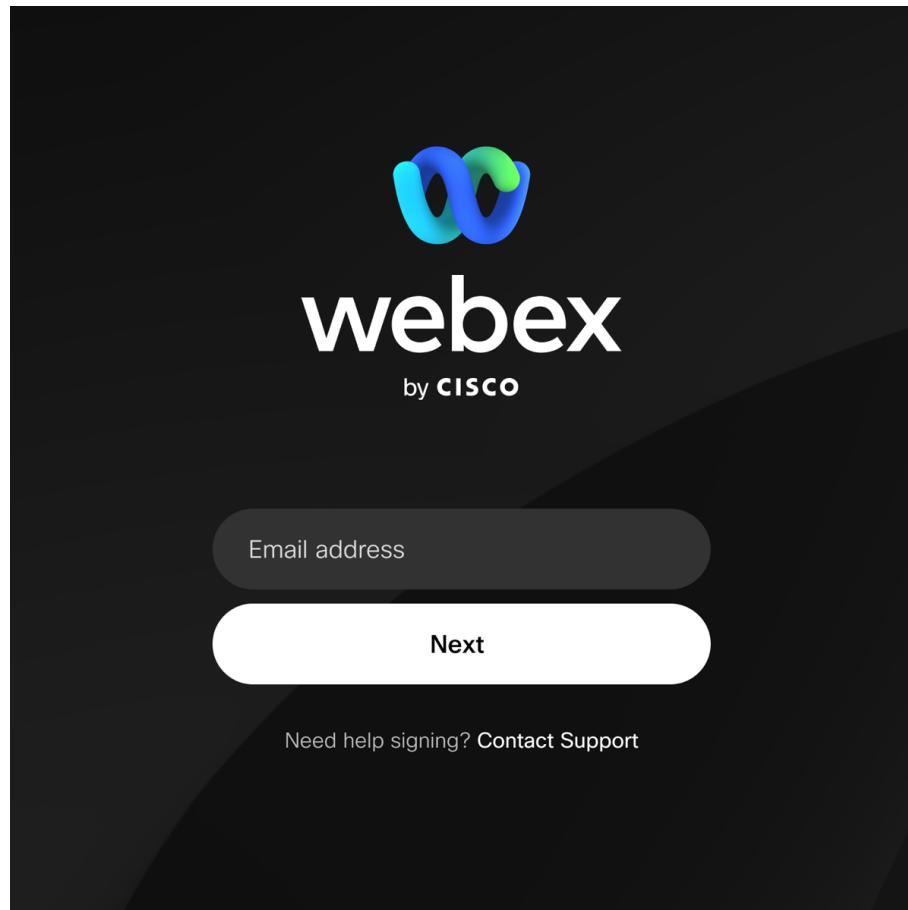


# Route Calls to Webex CC



CiscoLive Session: Intelligently Handling Call Traffic Between Premise & Cloud Contact Centre – BRKCCT-3735

<https://www.ciscolive.com/on-demand/on-demand-library.html?search.event=1675713481674001JK6C&zid=pp&search=Paul%20Indal#/session/1675722349972001tzKt>



# Migration Tools



# UCCX to Webex CC Toolbox Overview

UCCX



1  
UCCX Extraction Tool



2  
Partner/CSM  
Manual Config

Queue Name	Description	Channel Type	Queue Routing Type	Agent Selection	Call Details
100Calls	Calls	VOICE	Skill Based	<Perform Agent Selection if Queue Routing is Skill Based only>	<Customer provided>
email120	email120	EMAIL	Skill Based	Best Available Agent	<Customer provided>
chat120	chat120	CHAT	Longest Available	<Perform Agent Selection if Queue Routing is Skill Based only>	<Customer provided>
FBM120-1	FBM120-1	CHAT	Longest Available	<Perform Agent Selection if Queue Routing is Skill Based only>	<Customer provided>
FBM120-2	FBM120-2	CHAT	Longest Available	<Perform Agent Selection if Queue Routing is Skill Based only>	<Customer provided>
FBM120-3	FBM120-3	CHAT	Longest Available	<Perform Agent Selection if Queue Routing is Skill Based only>	<Customer provided>
queue1	queue1	VOICE	Longest Available	<Perform Agent Selection if Queue Routing is Skill Based only>	<Customer provided>
queue2	queue2	VOICE	Longest Available	<Perform Agent Selection if Queue Routing is Skill Based only>	<Customer provided>
queue3	queue3	VOICE	Longest Available	<Perform Agent Selection if Queue Routing is Skill Based only>	<Customer provided>



3  
Bulk Upload CSV  
Files

Webex CC

CCX to Webex CC Transition Tool currently helps migrate approximately 50% of CCX configuration elements and will soon increase that value as tool features continue to develop



# Toolbox Description

1

## CCX Extraction Tool

The CCX Extraction tool is used to extract all CCX configs and Prompts

- An Excel spreadsheet is created with tabs for each config object
- Extraction tool also used to create .csv files for bulk uploader
- Prompts are downloaded to a zip file

2

## Partner/CSM

Partner and CSM should review and revise the Data Discovery Sheet

- Each tab contains downloaded config data as well as config elements still needed *<shown in brackets>*
- Ensure all required config info is completed prior to using the Bulk Upload Tool

3

## Bulk Upload Tool

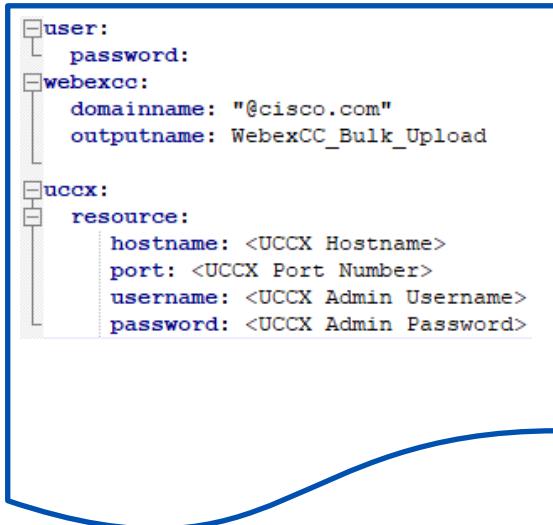
Using the same Java executable with the -zip flag to create individual .csv files for each object

- Individual objects can be uploaded using the bulk upload tool
- Order is important for some objects
- Some configuration must still be manually done..
  - For now..



# Extraction Tool Components and Usage

Application-pro.yml



Java Executable



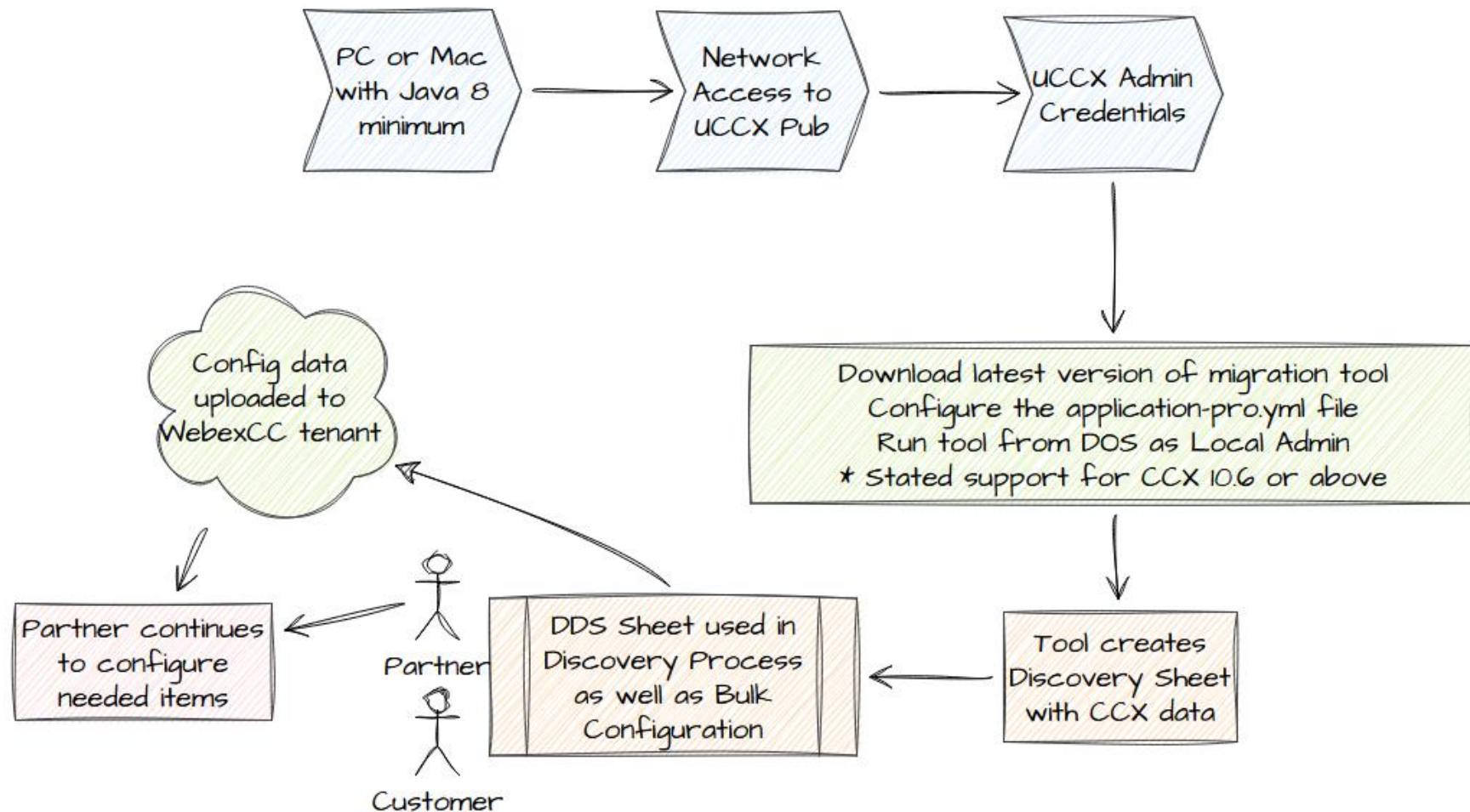
uccx-to-webexcc-v3.x.jar

Documentation



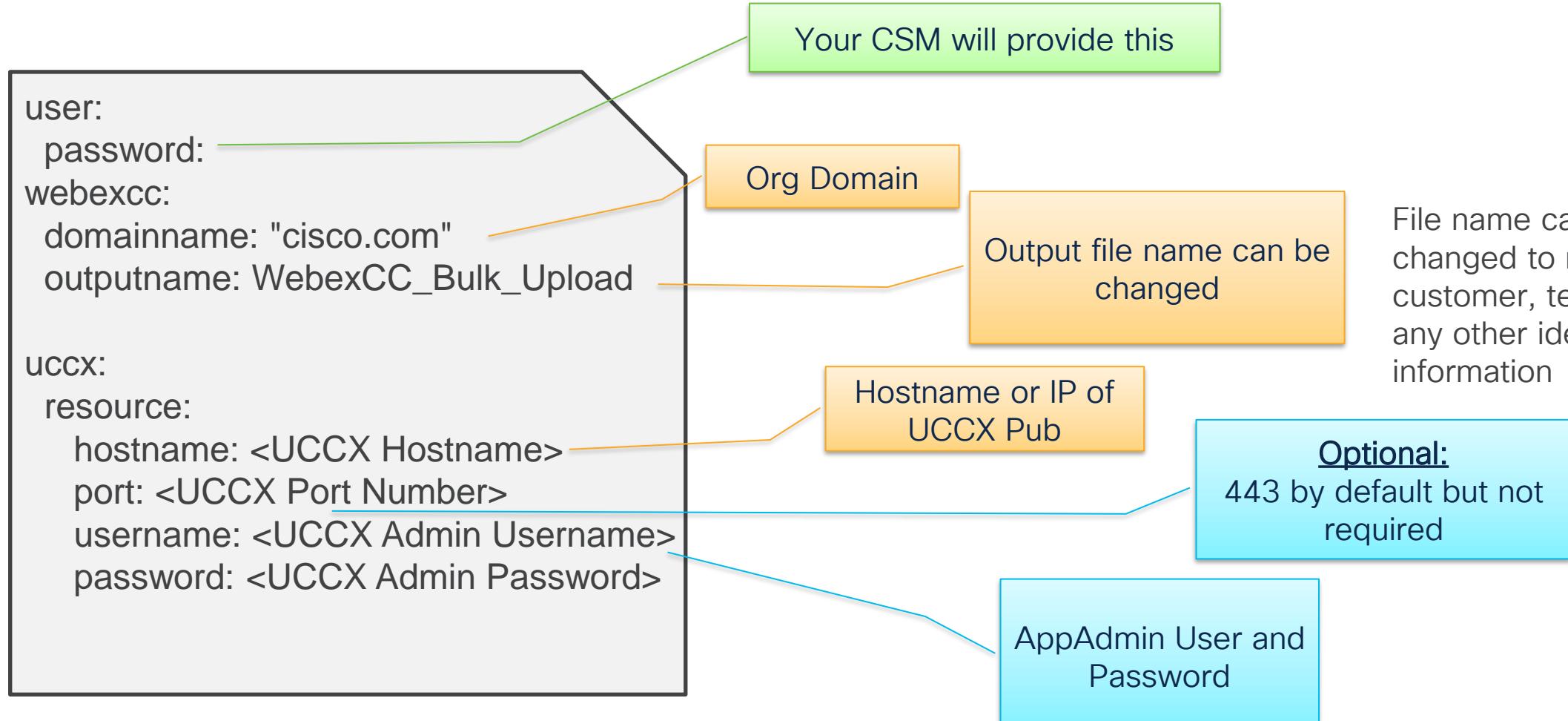
Unified CCX to Webex CC  
Discovery Tool Version 3

# Prerequisite & Tool Usage



\*API's that don't exist in older versions are simply skipped (fail).

# Extraction Tool Configuration



# Java Executable

## Uses:

- Extract data from UCCX to the DDS Excel sheet (-extract flag)
- Reformat the completed DDS into individual .csv files for Bulk Uploader (-zip flag)

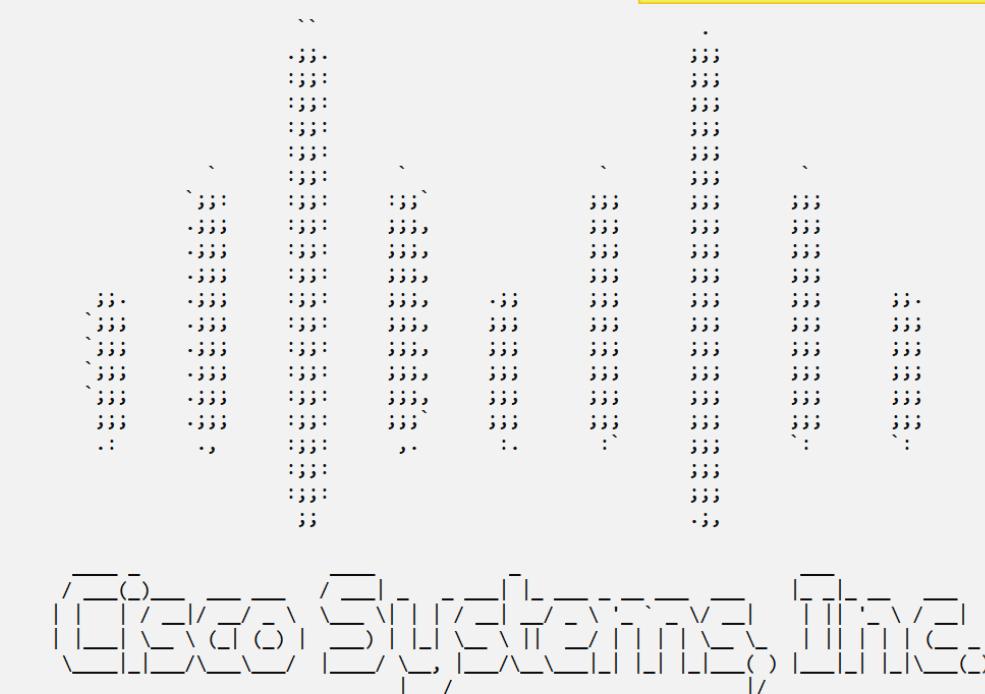
## Dependencies:

- Java version 8 or above on Mac or PC
- Run from system with network access to UCCX Pub
- Run in DOS with Admin privileges

## Usage:

```
'-extract' to generate the DDS Excel File.  
'-i -extract' to generate the DDS Excel File ignoring SSL  
Certs.  
'-zip' to generate the CSV ZIP File.
```

```
C:\Users\miturnbo\Desktop\Migration\UCCX-WXCC-Migration-tools>java -jar uccx-to-webexcc-v3.0.jar -i -extract
```



```
*****  
?Unified CCX to Webex Contact Center Data Discovery Tool?  
Authorized Users Only. Cisco Confidential.  
Copyright ? 2022 Cisco Systems Inc.  
  
This tool should only be used to collect UCCX Configuration Data for Discovery, Assessment and Import.  
Based on customer approval this tool should be used by an authorized Cisco UCCX personnel during off-peak hours.  
  
For more information: uccxdiscoverytool@cisco.com  
*****
```

# Extraction Demo

# Notes on New 3.3 Version

Extraction demo was recorded on the older version of the tool. The new v3.3 version is available on CCO.

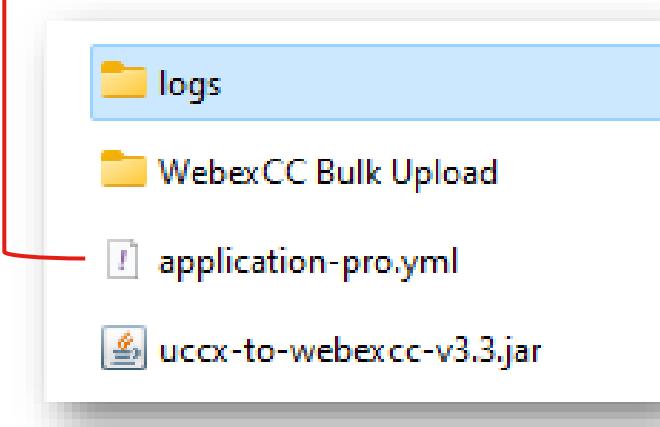
- 3.3 version does not come with a separate application-pro.yml configuration file
- Application-pro.yml gets created the first run through the tool
- Subsequent tool runs will utilize the existing .yml file
- The tool will not save CCX login credentials entered in the process of creating the .yml
- CCX credentials may be saved manually in the .yml and read by the tool

# Extraction Tool Configuration

```
C:\Users\miturnbo\OneDrive - Cisco\Desktop\Temp\tool>java -jar uccx-to-webexcc-v3.3.jar  
Configuration file is missing. Do you wish to create a file (y/n) : y  
  
Please enter the missing Configuration details.  
Migration Password :  
Domain name : @cisco.com  
Hostname : uccx125pub.css.com  
Port : 443  
Username : appuser  
Password :  
  
Configuration file saved successfully!
```

The new tool allows the .yml file to be created and filled out in the process of running the tool

The tool will recognize if application-pro.yml exists and will not prompt to create again



## Question:

We currently only download en\_US prompts. If given the option, would you rather:

1. Tool asks which language you want to download
2. Tool appends language to all prompts prior to downloading and all are downloaded. E.g.. en\_US\_greeting.wav

# Software Download

File is “signed” with the .sgn extension. No need to remove this extension

Downloads Home / Special Release

Search...

Expand All

Selected Releases  
**12.5(1)**

## Details

Description : Discovery Tool is used to collect current configuration data from the UCCX servers in a "Read-only" manner and convert it into WebexCC Discovery document. This tool is intended to be used only to collect UCCX and Finesse Configuration data

Release : 12.5(1)

Release Date : 10-Apr-2023

FileName : **uccx-to-webexcc-v3.3.jar.sgn**

Size : 63.99 MB ( 67095710 bytes)

MD5 Checksum : b214d835d364f8eaf0dbd15948a9e5bb [Copy](#)

SHA512 Checksum : 557f80bad5a906692918a2039222fcc0 ... [Copy](#)

[Readme](#) [Advisories](#) [Up](#)



# What it does & doesn't TODAY...

## Does

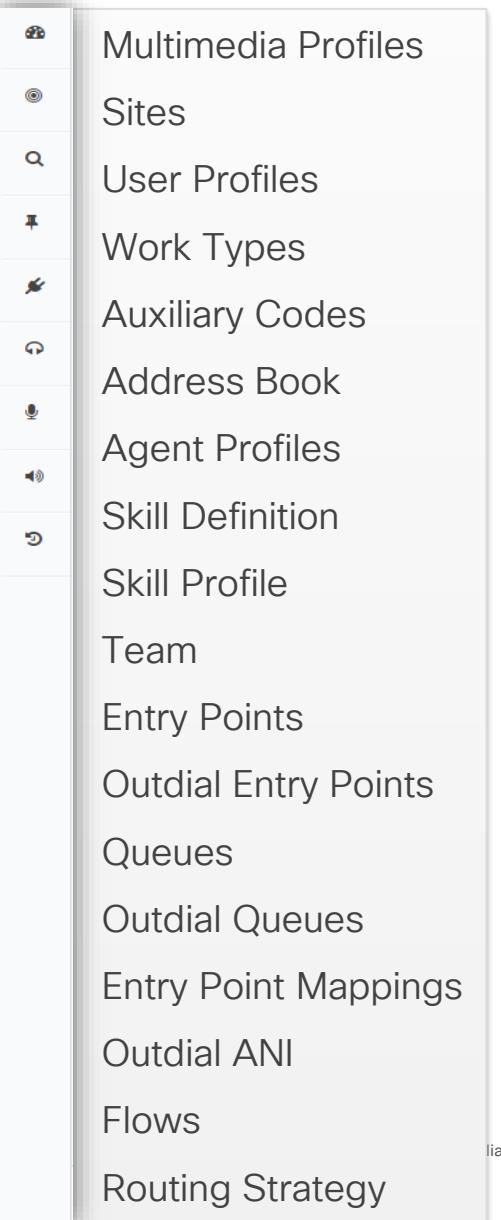
- Currently Voice Only
- Automated configuration data collected from UCCX Pub
- Converts UCCX configuration data into Webex CC specific configuration elements
- Some missing configuration info will be converted to defined default values
- Tool will convert completed DDS form into individual CSV files used by the Bulk Operations tool
- Discovery Sheet (DDS) can be used as a baseline discovery sheet outside of a CCX migration
- UCCX Prompts are downloaded

## Doesn't

- No digital channel configuration (skill data is downloaded)
- Does not migrate UCCX Scripts or calendars
- Does not migrate recordings, reporting data, Finesse gadgets or workflows
- Does not create users - Users are downloaded into the DDS but must be created in Control Hub
- Limited outbound
- No add-ons such as ASR/TTS, CRM, etc...
- Does not fill in all needed data - this is an opportunity to create a better customer experience.

Currently only en\_US messages are downloaded automatically

# Bulk Upload Order



The bulk upload tool requires a certain order

# UCCX to WxCC – Conceptual Mapping

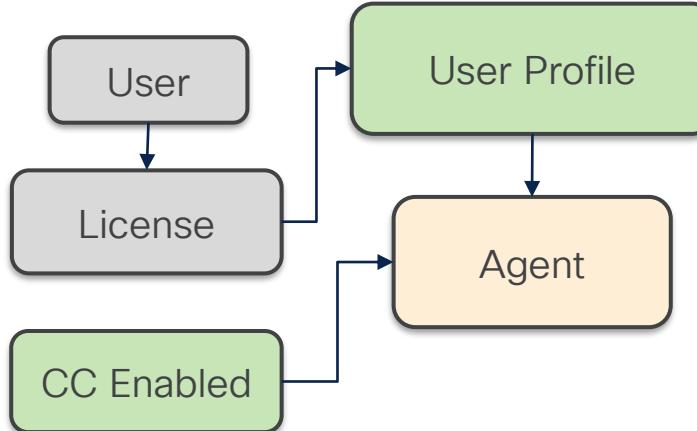
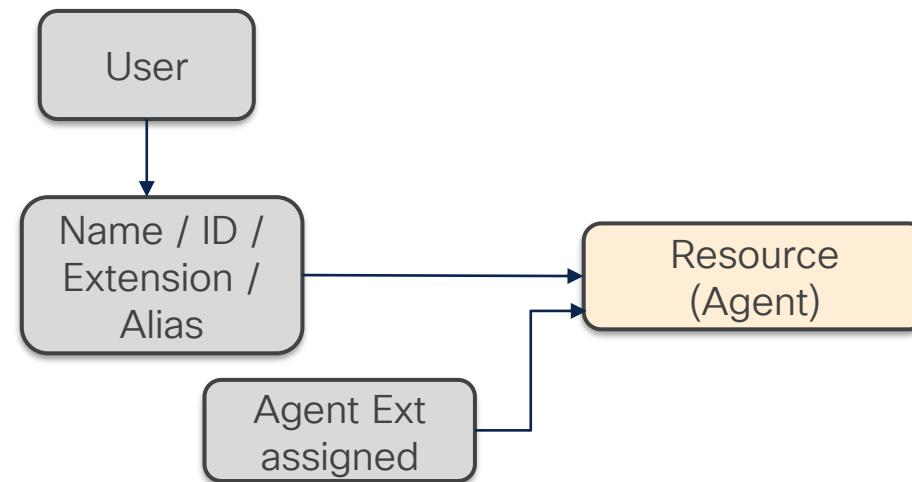


CUCM



CCX

Multimedia Profiles
Sites
User Profiles
Work Types
Auxiliary Codes
Address Book
Agent Profiles
Skill Definition
Skill Profile
Team
Entry Points
Outdial Entry Points
Queues
Outdial Queues
Entry Point Mappings
Outdial ANI
Flows
Routing Strategy



Portal



Control Hub

# UCCX to WxCC – Conceptual Mapping



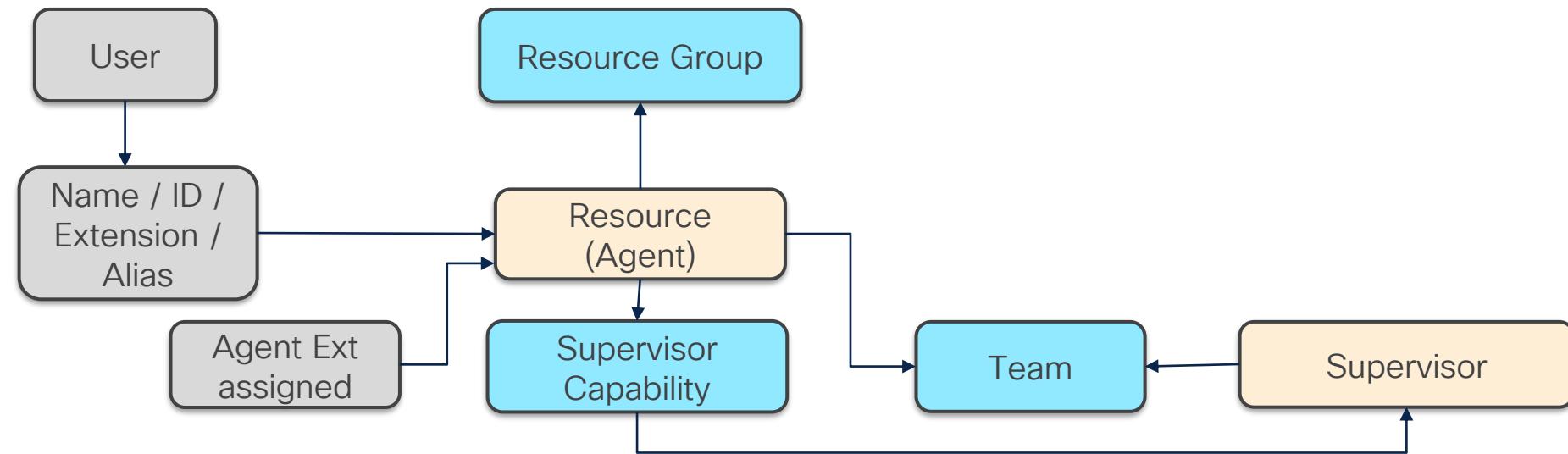
CUCM



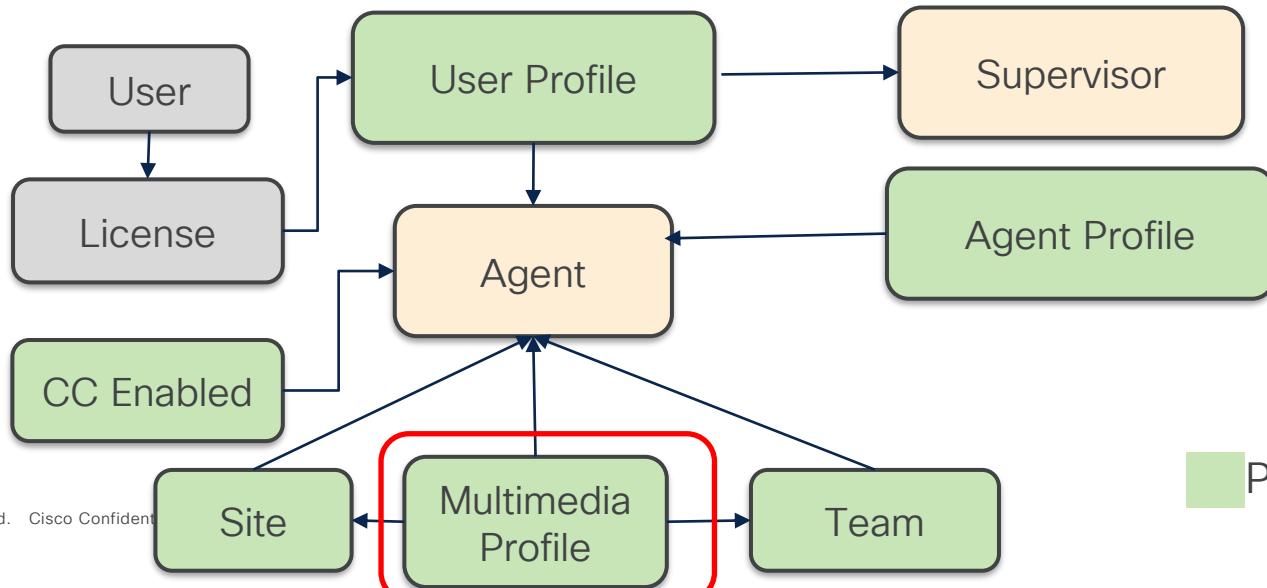
CCX

Multimedia Profiles
Sites
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Work Types
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Outdial Entry Points
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Routing Strategy

UCCX



Webex CC



Portal

Control Hub

# Deployment Discovery Sheet Elements

Mandatory

Optional

Blank

## Multimedia Profiles

Sites

User Profiles

Work Types

Auxiliary Codes

Agent Profiles

Address Book

Skill Definition

Skill Profile

Team

Entry Points

Outdial Entry Points

Queues

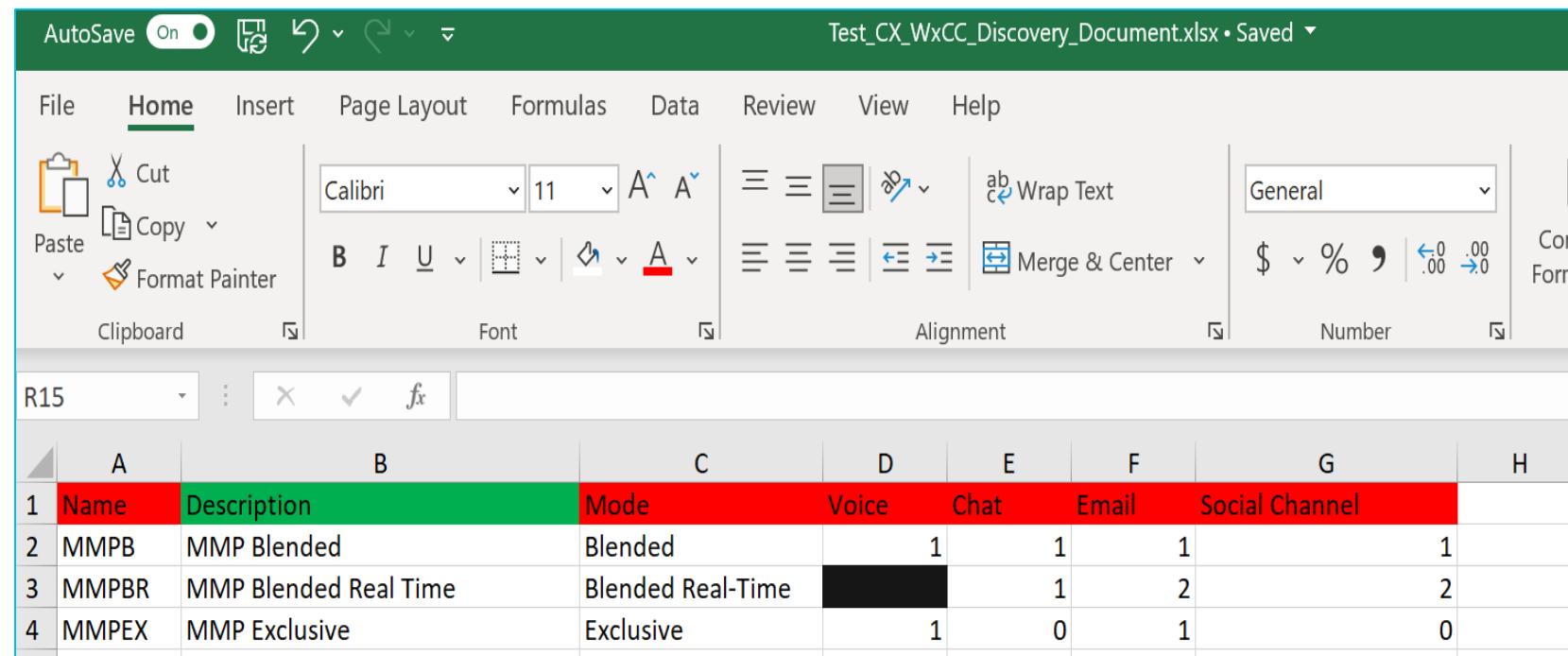
Outdial Queues

Entry Point Mappings

Outdial ANI

Flows

Routing Strategy



	Name	Description	Mode	Voice	Chat	Email	Social Channel
1	MMPB	MMP Blended	Blended	1	1	1	1
2	MMPBR	MMP Blended Real Time	Blended Real-Time		1	2	2
3	MMPEX	MMP Exclusive	Exclusive	1	0	1	0

Multimedia profiles do not exist in CCX so default values will be posted. **Default\_Telephony\_Profile** and **Default\_Multimedia\_Profile** exist already

- Voice can only be 1
- Digital channels are 0 to 5
- For a Blended Real-time multimedia profile , Voice is left blank
- For exclusive multimedia profile the value is either 0 or 1 for all the channels

# UCCX to WxCC – Conceptual Mapping



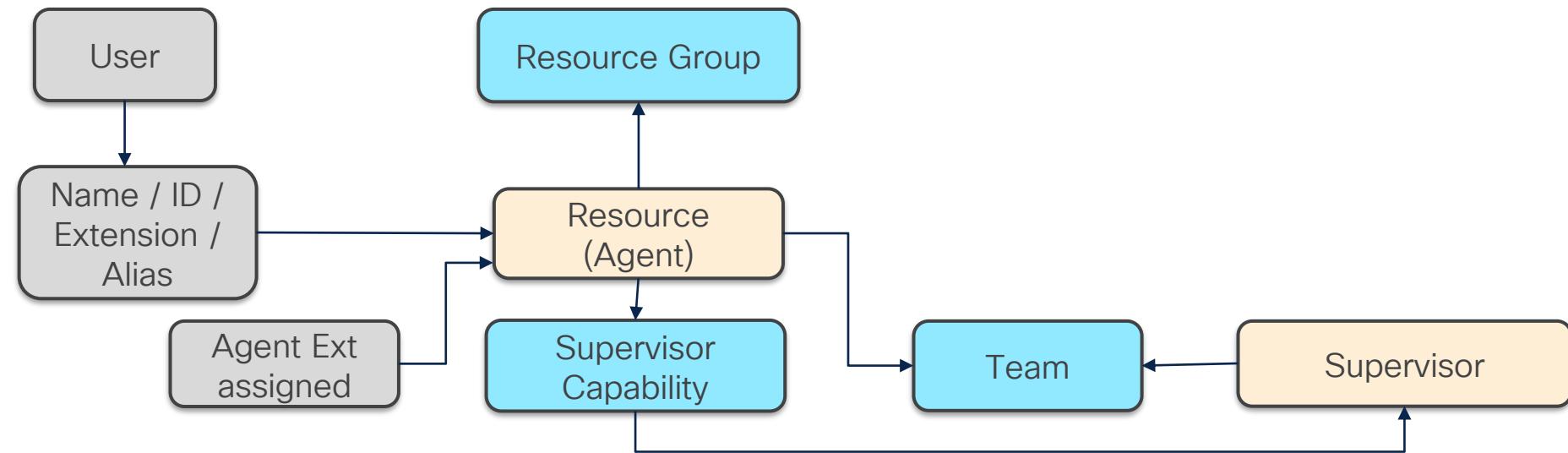
CUCM



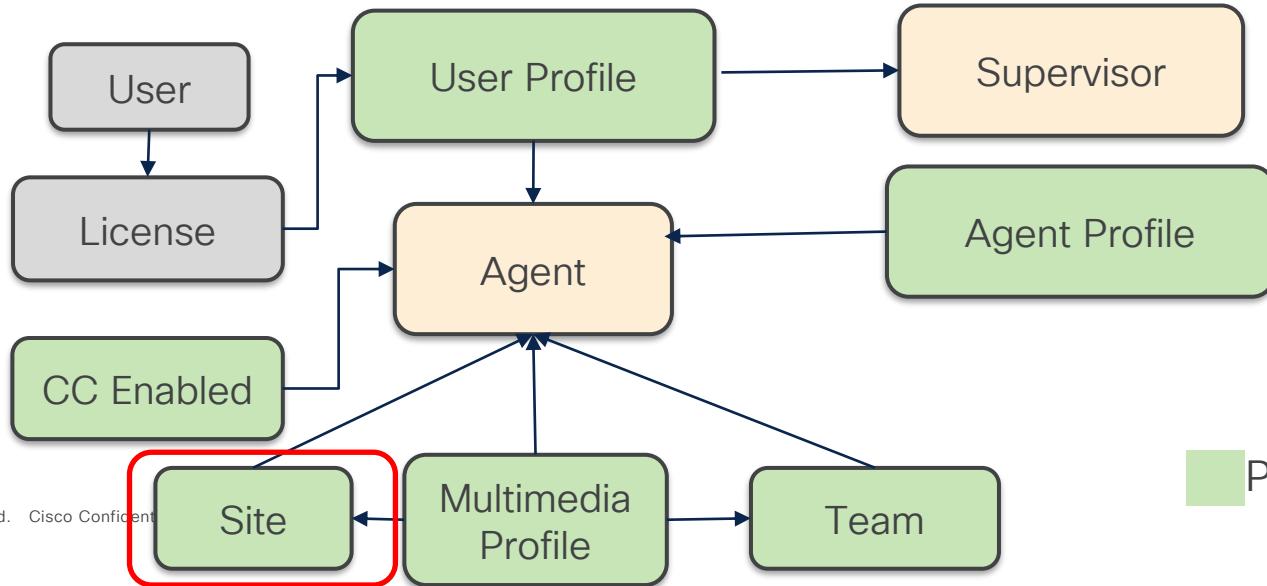
CCX

Multimedia Profiles
Sites
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Work Types
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Routing Strategy

UCCX



Webex CC



Portal

Control Hub

# UCCX to WxCC – Conceptual Mapping

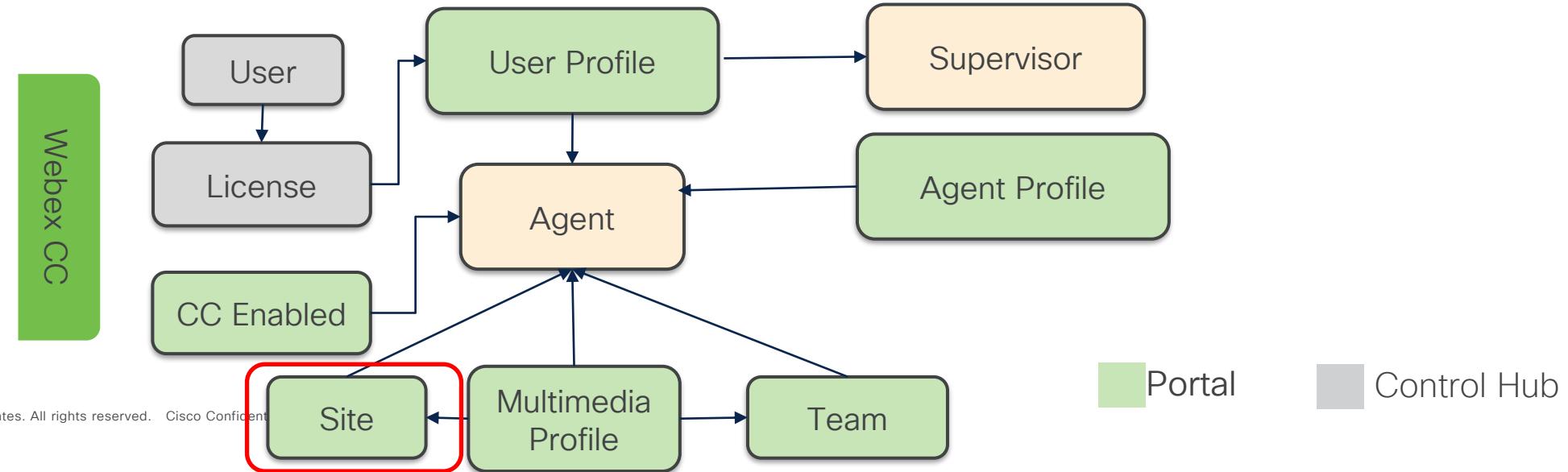
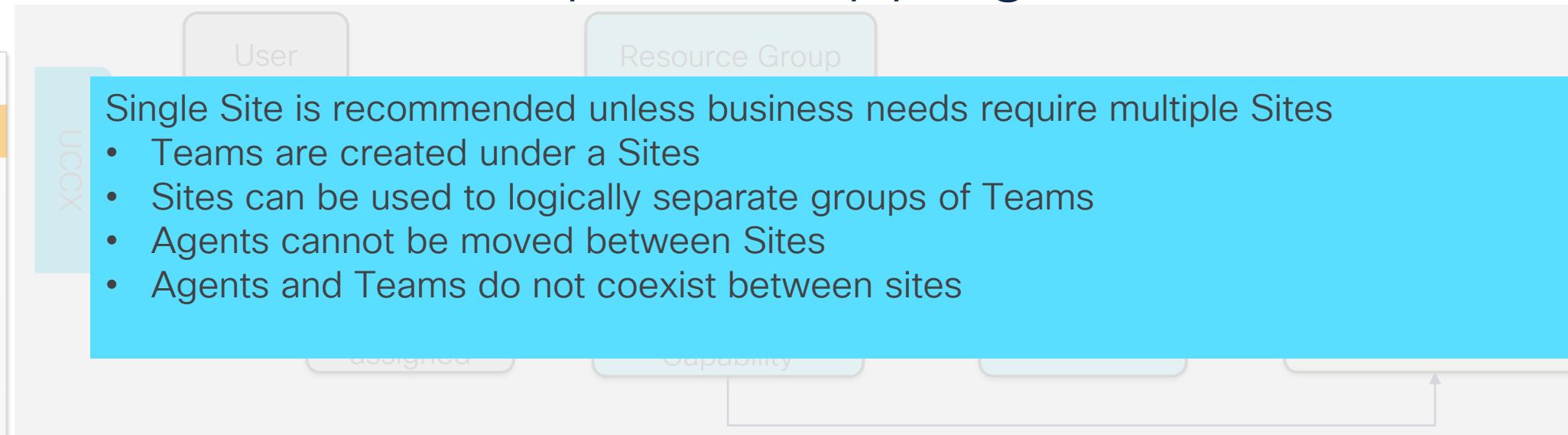


CUCM



CCX

- Multimedia Profiles
- **Sites**
- User Profiles
- Work Types
- Auxiliary Codes
- Agent Profiles
- Address Book
- Skill Definition
- Skill Profile
- Team
- Entry Points
- Outdial Entry Points
- Queues
- Outdial Queues
- Entry Point Mappings
- Outdial ANI
- Flows
- Routing Strategy

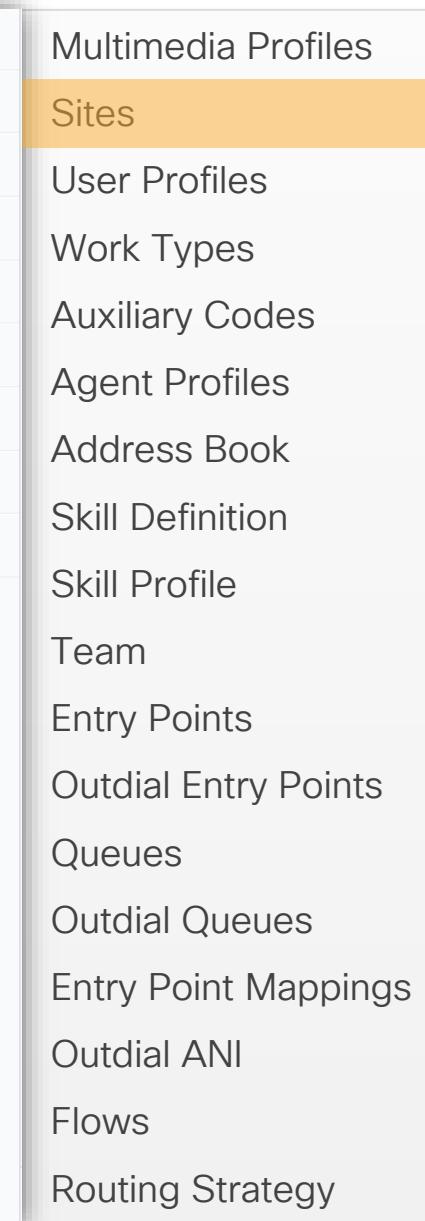


# Deployment Discovery Sheet Elements

Mandatory

Optional

Blank



	A	B	C	D
1	Name	Multimedia Profile		
2	aSite	Default_Telephony_Profile		
3	bSite	Default_Telephony_Profile		
4	cSite	Default_Telephony_Profile		

- Single Site is recommended unless business needs require multiple Sites
- Teams are created under a Sites
  - Sites can be used to logically separate groups of Teams
  - Agents cannot be moved between Sites
  - Agents and Teams do not coexist between sites

**Site**

General Settings

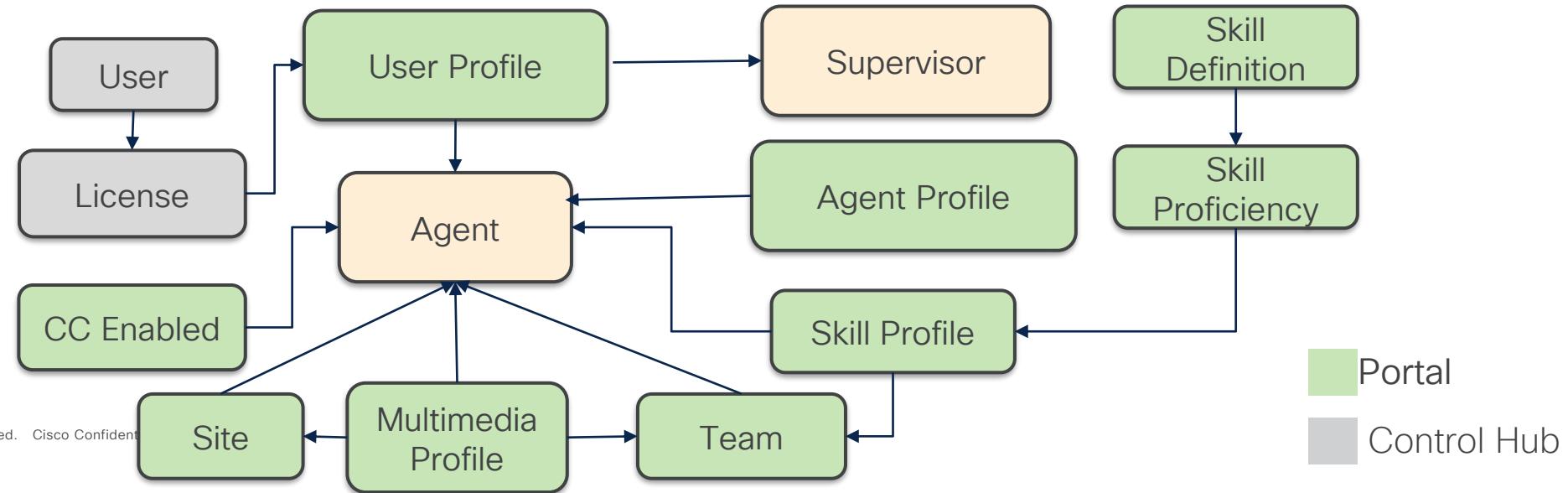
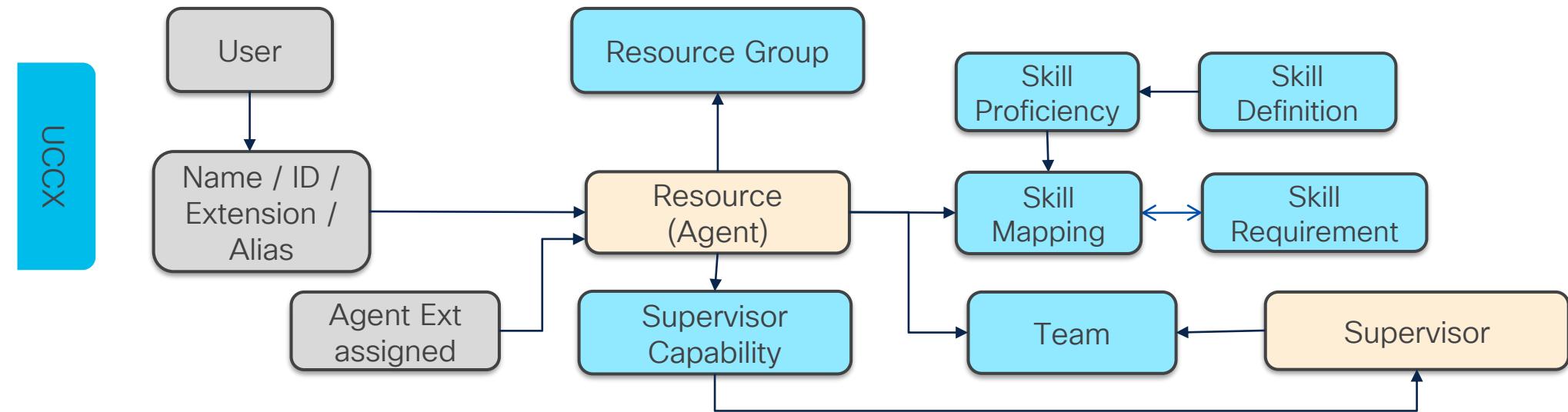
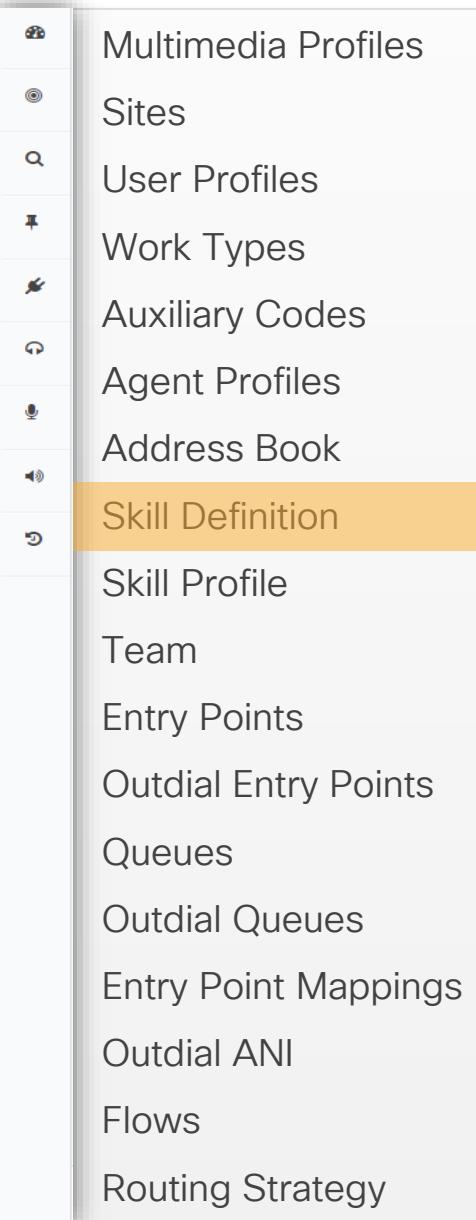
Name:

Advanced Settings

Multimedia Profile:

Default\_Telephony\_Profile  
Default\_Multimedia\_Profile

# WUCCX / Webex CC Conceptual Mapping



Portal  
Control Hub

# Deployment Discovery Sheet Elements

Mandatory

Optional

Blank

Multimedia Profiles

Sites

User Profiles

Work Types

Auxiliary Codes

Agent Profiles

Address Book

**Skill Definition**

Skill Profile

Team

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Routing Strategy

A	B	C	D	E
Name	Description	Service Level Threshold	Type	List Values For Enum
Chat_Skill	Ability to Chat	30	Proficiency	10
CustomerService_skill	Customer Service	30	Proficiency	10
Sales_skill	Sales	30	Proficiency	10
Email_skill	Ability to Email	30	Proficiency	10
Voice_skill	Ability to take a call	30	Proficiency	10
Bowstaff_skill	Napoleon complex	30	Boolean	TRUE

## Skill Definitions

+ New Skill Definition

Name	Description	Type
... Bowstaff_skill	Napoleon complex	Boolean
... Chat_Skill	Ability to Chat	Proficiency
... CustomerService_skill	Customer Service	Proficiency
... Email_skill	Ability to Email	Proficiency
... Sales_skill	Sales	Proficiency
... Voice_skill	Ability to take a call	Proficiency

# Deployment Discovery Sheet Elements

Mandatory

Optional

Blank

Multimedia Profiles

Sites

User Profiles

Work Types

Auxiliary Codes

Agent Profiles

Address Book

Skill Definition

Skill Profile

Team

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Flows

Routing Strategy

	A	B	C	D
1	Name	Description	Skill Name	Skill Values
2	Chat Profile	Chat Skillz	Chat_skill	10
3	Chat Profile	Customer Service Sk	CustomerService_sk	10
4	Chat Profile	Bowstaff Skillz	Bowstaff_skill	TRUE
5	Email Profile	Email Skillz	Email_skill	10
6	Email Profile	Customer Service Sk	CustomerService_sk	10
7	Voice Profile	Voice Skillz	Voice_skill	10
8	Voice Profile	Sales skillz	Sales_skill	10

- Skill Profile does not exist in UCCX and must be created for any Skill Definitions
- Mandatory Fields
  - Name
  - Skill Name
  - Skill Type
  - Skill Values
- Use a separate row to define each skill assigned to the same profile

# Deployment Discovery Sheet Elements

Mandatory

Optional

Blank

Multimedia Profiles

Sites

User Profiles

Work Types

Auxiliary Codes

Agent Profiles

Address Book

Skill Definition

**Skill Profile**

Team

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Routing Strategy

## Skill Profile

### General Settings

Name: Chat Profile

Description: Chat Skillz

### Active Skills

Select	Skill Name	Skill Type	Skill Value
<input checked="" type="checkbox"/>	Bowstaff_skill	Boolean	<input type="radio"/> True <input type="radio"/> False <span>10</span>
<input checked="" type="checkbox"/>	Chat_Skill	Proficiency	<div style="width: 100%;">10</div>
<input checked="" type="checkbox"/>	CustomerService_skill	Proficiency	<div style="width: 100%;">10</div>
<input type="checkbox"/>	Email_skill	Proficiency	<div style="width: 0%;">0</div>
<input type="checkbox"/>	Sales_skill	Proficiency	<div style="width: 0%;">0</div>
<input type="checkbox"/>	Voice_skill	Proficiency	<div style="width: 0%;">0</div>

Note: All Skill Definitions exist in Skill Profiles but are only activated if Select is checked and a value is assigned

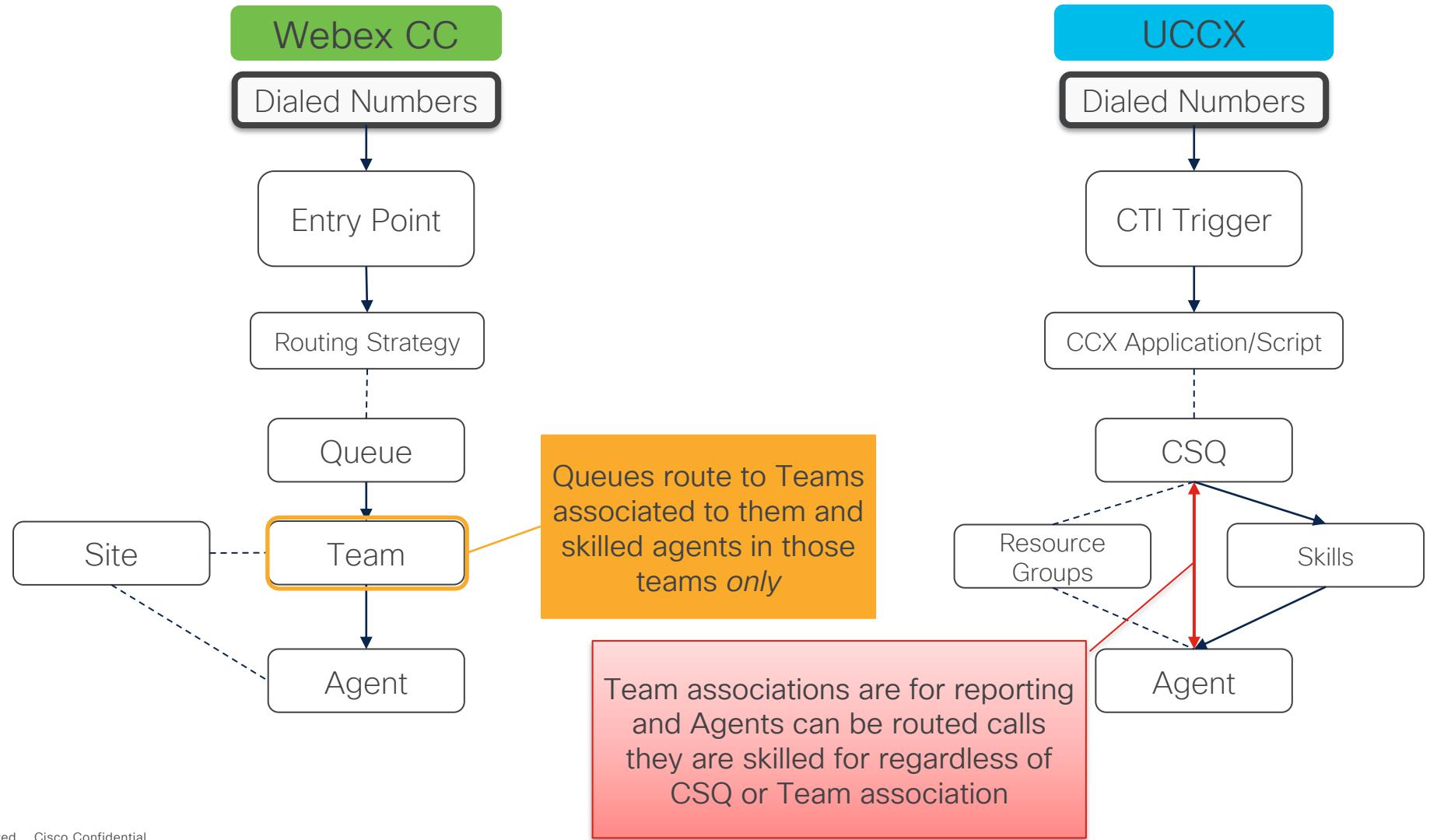
A	B	C	D
1 Name	Description	Skill Name	Skill Values
2 Chat Profile	Chat Skillz	Chat_skill	10
3 Chat Profile	Customer Service Sk	CustomerService_sk	10
4 Chat Profile	Bowstaff Skillz	Bowstaff_skill	TRUE
5 Email Profile	Email Skillz	Email_skill	10
6 Email Profile	Customer Service Sk	CustomerService_sk	10
7 Voice Profile	Voice Skillz	Voice_skill	10
8 Voice Profile	Sales skillz	Sales_skill	10

[Help](#) [Skill Profiles](#) > Edit

# Routing Differences Between Platforms



- Multimedia Profiles
- Sites
- User Profiles
- Work Types
- Auxiliary Codes
- Agent Profiles
- Address Book
- Skill Definition
- Skill Profile
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- Queues
- Outdial Queues
- Entry Point Mappings
- Outdial ANI
- Flows
- Routing Strategy



# Java Executable

## Uses:

- Extract data from UCCX to the DDS Excel sheet (-extract flag)
- Reformat the completed DDS into individual .csv files for Bulk Uploader (-zip flag)

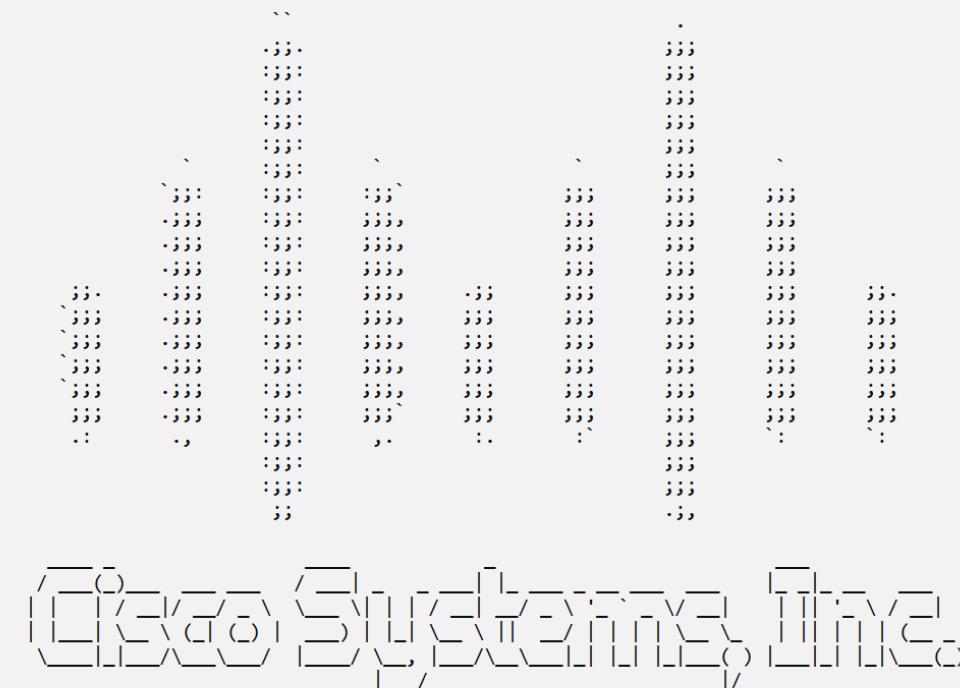
## Dependencies:

- Java version 8 or above on Mac or PC
- Run from system with network access to UCCX Pub
- Run in DOS with Admin privileges

## Usage:

```
<C:\>java -jar uccx-to-webexcc-v3.3.jar -zip
```

```
C:\Users\miturnbo\Desktop\Migration\UCCX-WXCC-Migration-tools>java -jar uccx-to-webexcc-v3.0.jar -i -extract
```



```
*****
```

?Unified CCX to Webex Contact Center Data Discovery Tool?

Authorized Users Only. Cisco Confidential.

Copyright ? 2022 Cisco Systems Inc.

This tool should only be used to collect UCCX Configuration Data for Discovery, Assessment and Import.  
Based on customer approval this tool should be used by an authorized Cisco UCCX personnel during off-peak hours.

For more information: [uccxdiscovetool@cisco.com](mailto:uccxdiscovetool@cisco.com)

```
*****
```

# Demo - Upload Config to Webex CC

# How to get the migration tool

1. Check the Webex Space for a link to request the download info for the tool.
2. Fill out the form
3. Check the box “Send me a copy of my responses”
4. Check your email for a link to the tool on CCO



The form is titled "CCX Migration Tool Request" and is a "Request form for partners wanting to download the latest version of CCX to WebexCC migration tool". It contains the following fields:

- Partner Name \*
- Business name of the partner
- CCX Customer Name
- Last Name \*
- First Name \*
- Email Address \*
- CCX From Version
- Select or enter value
- Form Date Field
- Send me a copy of my responses

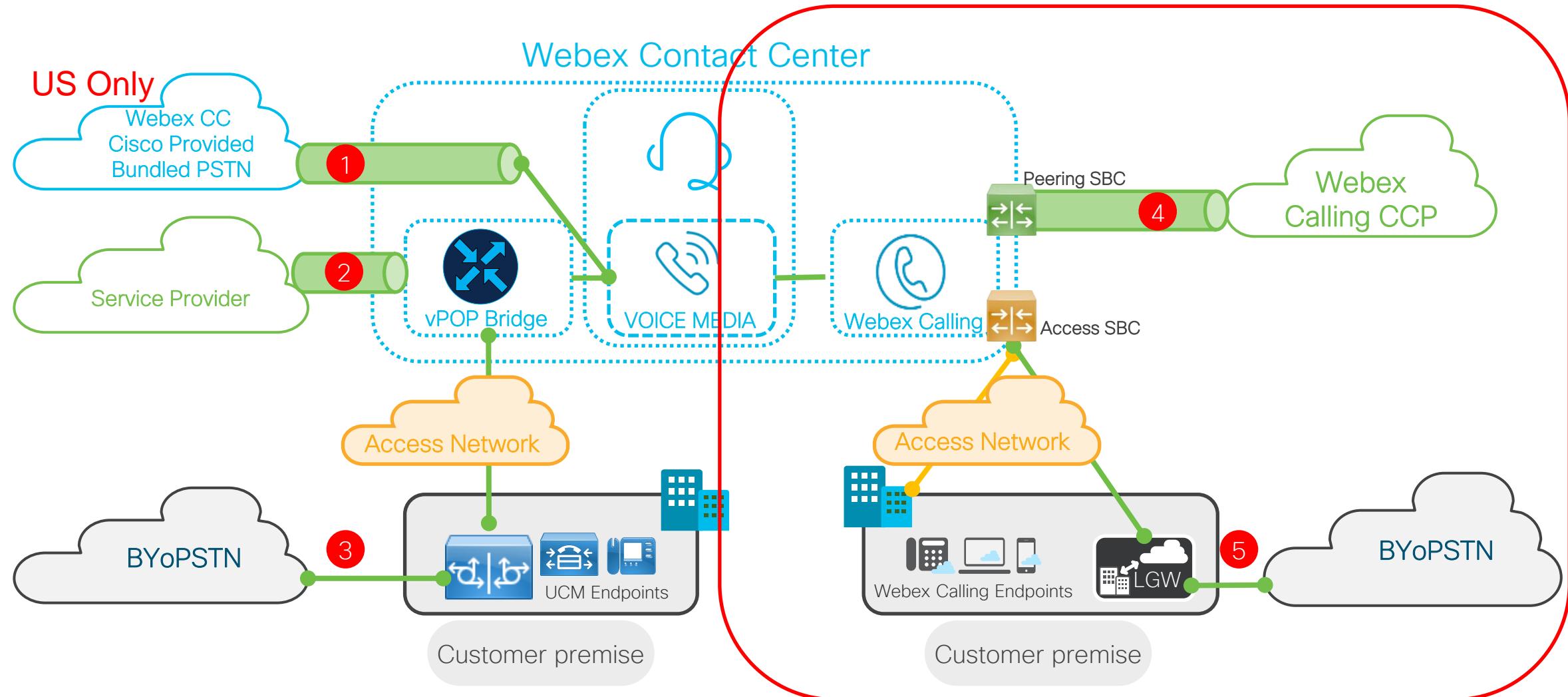
At the bottom right are links for "Powered by smartsheet", "Privacy Notice", and "Report Abuse".

# Transition to Webex Calling?



With Webex Calling

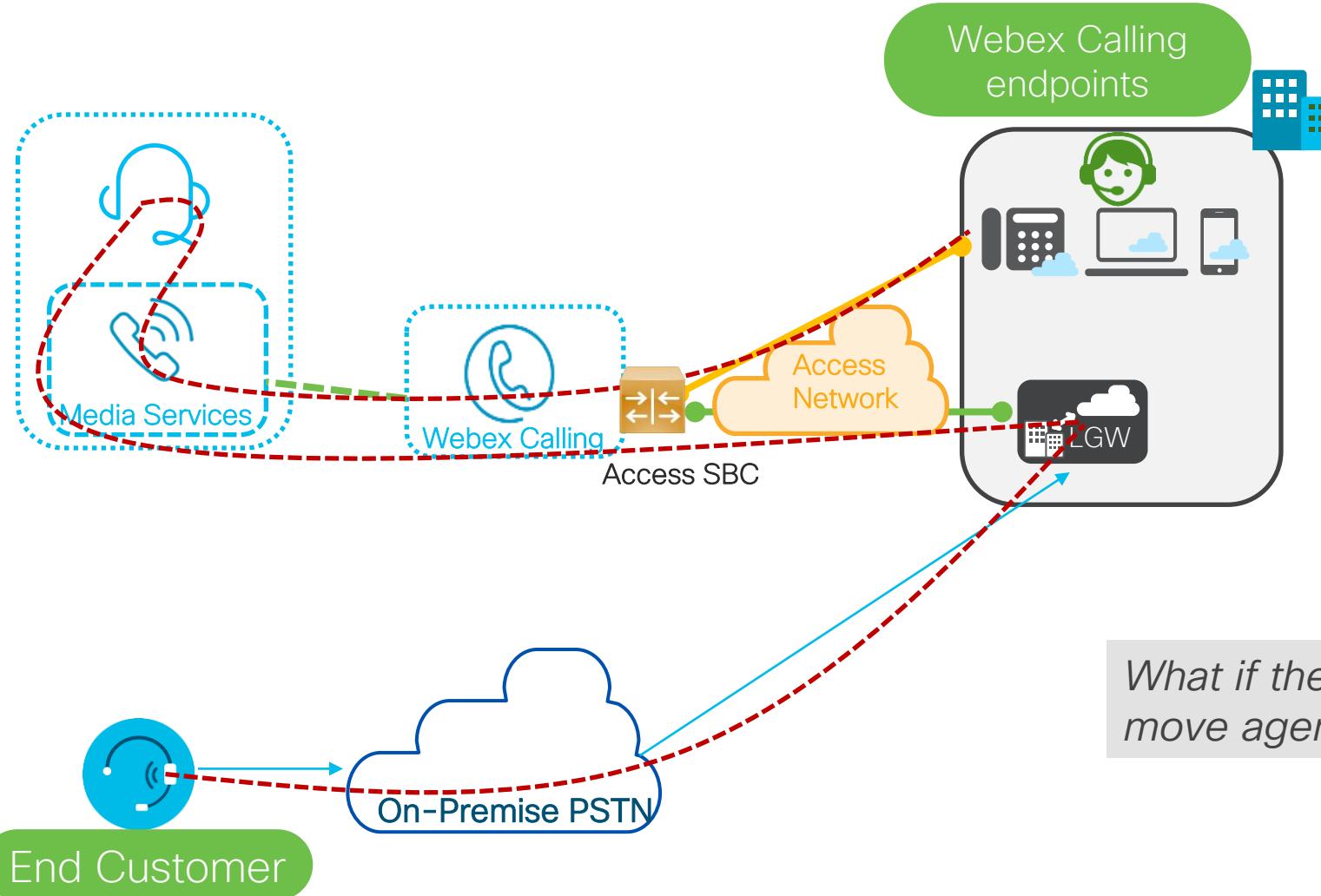
# Webex Contact Center



# Transition from UCM/UCCX to Webex CC & Webex Calling



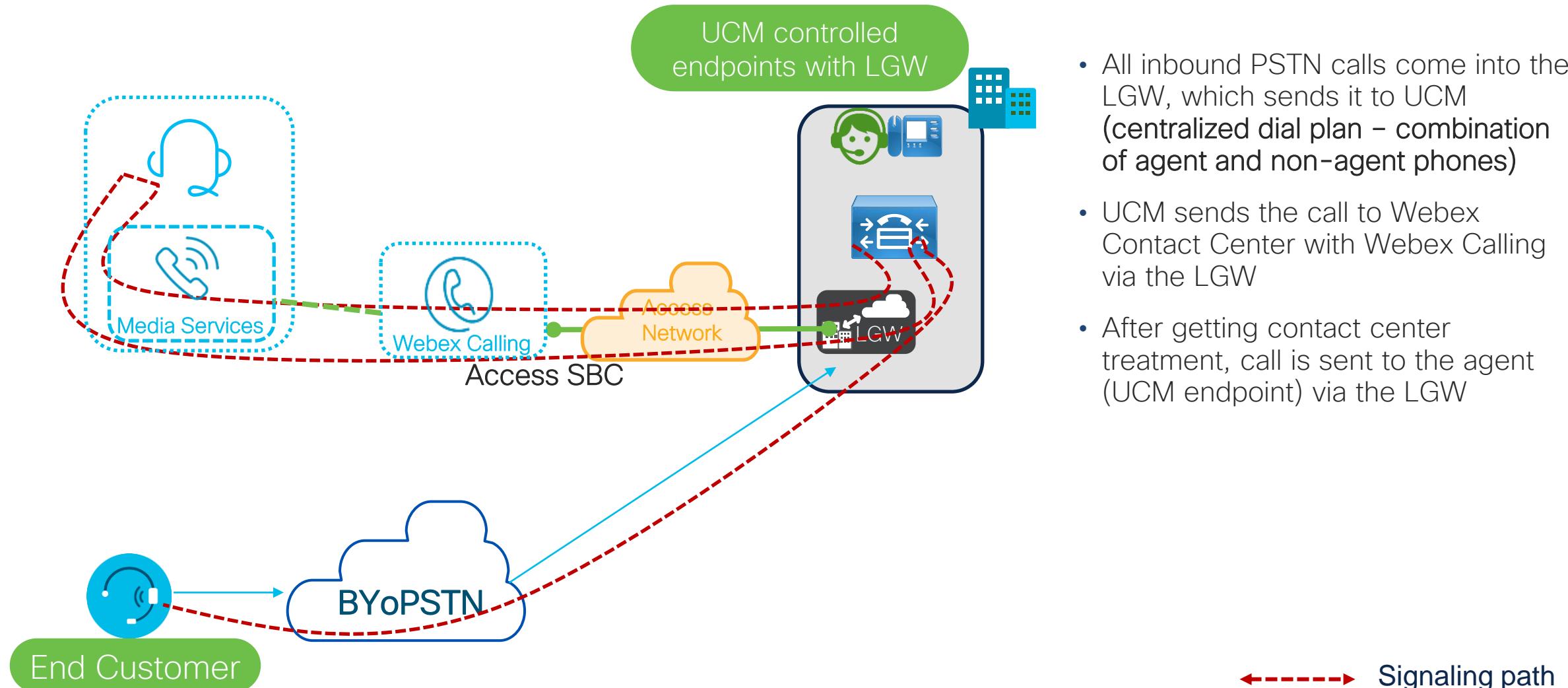
# Recall ... Webex Calling with Premises-based PSTN

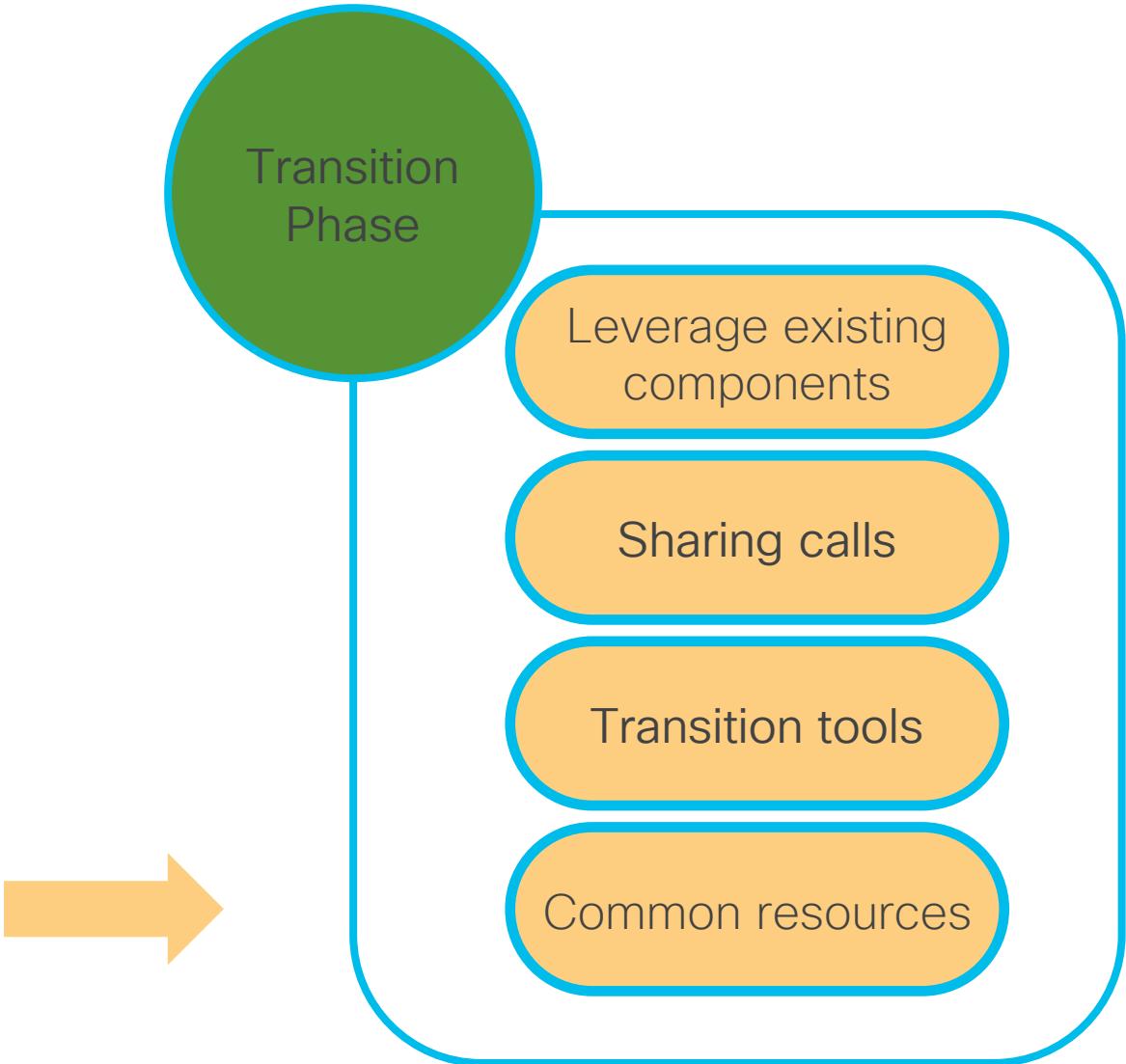


- Call comes in via customer owned PSTN service, terminating on LGW
- LGW delivers the call to the Webex Calling Access SBC/Webex Contact Center with Webex Calling
- After getting contact center treatment, call is sent to the agent (Webex Calling endpoint) over the Internet

*What if the customer has UCM and want to move agents to Webex Calling?*

# Transition from UCM/UCCX to Webex CC & Webex Calling





# Top 10 CUIC Reports

# Top 10 CUIC Reports available on Webex Contact Center

## CCX CUIC

1. Abandoned Call Detail Activity
2. CSQ Agent Summary
3. Agent All Fields
4. Agent Detail
5. Agent Summary
6. CSQ Activity by Window Duration
7. CSQ Call Distribution Summary
8. CSQ All Fields Report
9. Multichannel Agent Summary
10. Application Summary

Default is Disabled



# Top 10 CUIC Reports available on Webex Contact Center

## CCX CUIC

1. Abandoned Call Detail Activity
2. CSQ Agent Summary
3. Agent All Fields
4. Agent Detail
5. Agent Summary
6. CSQ Activity by Window Duration
7. CSQ Call Distribution Summary
8. CSQ All Fields Report
9. Multichannel Agent Summary
10. Application Summary



Your CSM Can Enable

# Top 10 CCX Reports in Webex CC

The screenshot shows the Cisco Webex CC Visualization interface. The top navigation bar includes the Cisco logo, a menu icon, the word "Visualization", a tenant selection dropdown (Tenant (UTC-06:00) Cent...), a threshold alerts icon, and a user profile for Mike Turnbow. Below the navigation is a search bar with "Search Folders & Visualizations" and a "Show: Everything" dropdown. A breadcrumb trail at the top left shows the path: Home > Visualization > Stock Reports > Transition Reports. This breadcrumb trail is highlighted with a red rectangle. The main area is titled "Visualizations" and contains a grid of report cards. Each card has a yellow folder icon and a title, ID, temporal scope, creator, and modification date.

Report Title	ID	Temporal Scope	Created By	Modified
Abandoned Call Detail Activity Report	ID -1258	Historical	Cisco	Nov 13, 2022 10:24:56 PM
Agent Call Summary Report	ID -1263	Historical	Cisco	Mar 6, 2022 10:40:35 PM
Agent Detail Report	ID -1259	Historical	Cisco	Nov 13, 2022 10:24:56 PM
Agent Summary Report	ID -1266	Historical	Cisco	Apr 10, 2022 11:39:50 PM
Application Summary Report	ID -1264	Historical	Cisco	Sep 22, 2022 12:14:15 AM
CSQ Activity Report by Window Duration	ID -1260	Historical	Cisco	Mar 6, 2022 10:40:35 PM
CSQ Agent Summary Report	ID -1261	Historical	Cisco	Mar 6, 2022 10:40:35 PM
CSQ All Fields Report	ID -1265	Historical	Cisco	Apr 10, 2022 11:39:50 PM
Multichannel Agent Summary	ID -1262	Historical	Cisco	Mar 6, 2022 10:40:35 PM

# Few things you should do on the first night in your new home



# Don't Forget Training!



## Agent

- Login / Logout
- State Changes
- Outbound Call
- Hold/Retrieve/Transfer/Conference
- Wrap up Codes
- ..etc

## Supervisor

- Reskilling
- Reports
- Analyzer
- Login / Logout
- State Changes
- Supervisor View
- Monitor Agent
- Barge In & Drop Agent
- Wrap up Codes
- ..etc

## Administrators

- Scripting
- Provisioning
- System monitor
- ....etc

### Reporting!

- Don't forget to cover reporting differences with the customer prior to go-live
- Don't wait for customer to find out the hard way about differences from their current platform
- Preparing the customer in advance will help the business transition be much easier



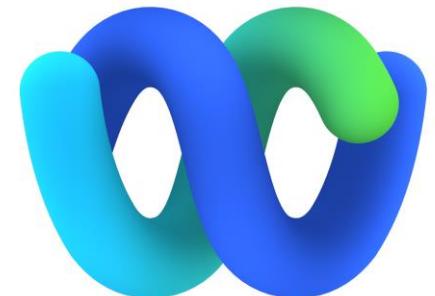
## Key Takeaways

- Bring Security & Network team early
- Leverage what you have
- Transition creates opportunities
- Cisco offers proven low risk Transition methodology
- The new CCX to Webex CC migration utility is available now



# References

- Migrating the Premise Contact Center to the Cloud - BRKCCT-1013
  - <https://www.ciscolive.com/on-demand/on-demand-library.html?search.event=1654953906132001zSK6&zid=pp&search=Arunabh#/session/1655424279363001QTqX>
- Intelligently Handling Call Traffic Between Premise & Cloud Contact Center - BRKCCT-2026
  - <https://www.ciscolive.com/on-demand/on-demand-library.html?search.event=1654953906132001zSK6&zid=pp&search=Paul%20TIndal#/session/1655424278481001QqGP>
- Deep Dive CCX to Webex CC
  - <https://salesconnect.cisco.com/#/search/-%2520UCCX%2520to%2520Webex%2520Contact%2520Center/content>
- Webex CC Data Sheet
  - <https://www.cisco.com/c/en/us/products/collateral/contact-center/webex-contact-center/datasheet-c78-744541.html>
- What's New in Webex Contact Center
  - <https://help.webex.com/en-us/article/a1gx3h/What's-New-in-Webex-Contact-Center>





The bridge to possible

# Appendix

# Updating the discovery sheet

# Deployment Discovery Sheet Elements

Mandatory

Optional

Blank

Multimedia Profiles

Sites

User Profiles

Work Types

Auxiliary Codes

Agent Profiles

Address Book

Skill Definition

Skill Profile

Team

Entry Points

Outdial Entry Points

Queues

Outdial Queues

Entry Point Mappings

Outdial ANI

Flows

Routing Strategy

The screenshot shows the Cisco Deployment Discovery Sheet interface. On the left, there's a navigation sidebar with various configuration items. The 'User Profiles' item is highlighted with an orange background. The main area displays two views of user profiles: a table view at the top and a detailed edit view below it.

**Table View:**

E6	A	B	C	D	E
1	Name	Description	Profile Type	Module Option	Agent Desktop
2	AdminProfile	admin profile test	Administrator	All	None
3	SupervisorProfile	supervisor profile test	Supervisor		
4	PremiumAgentProfile	premium agent profile test	Premium Agent		
5	StandardAgentProfile	standard agent profile test	Standard Agent		

**Edit View:**

**User Profile**

General Settings    Module Settings    Access Rights

**General Settings:**

Name	Supervisor Profile
Description	Supervisor Profile
Profile Type	Supervisor
Status	On

- User Profile Name required
- User Profile Type required
- All options can be edited later in the portal if desired or configured here
- Unavailable configuration elements for user type will result in default values

# Deployment Discovery Sheet Elements

## Optional

Blank

## Multimedia Profiles

## Sites

## User Profiles

## Work Types

## Auxiliary Codes

## Agent Profiles

## Address Book

## Skill Definition

## Skill Profile

Team

## Entry Points

## Outdial Entry Points

## Queues

## Outdial Queues

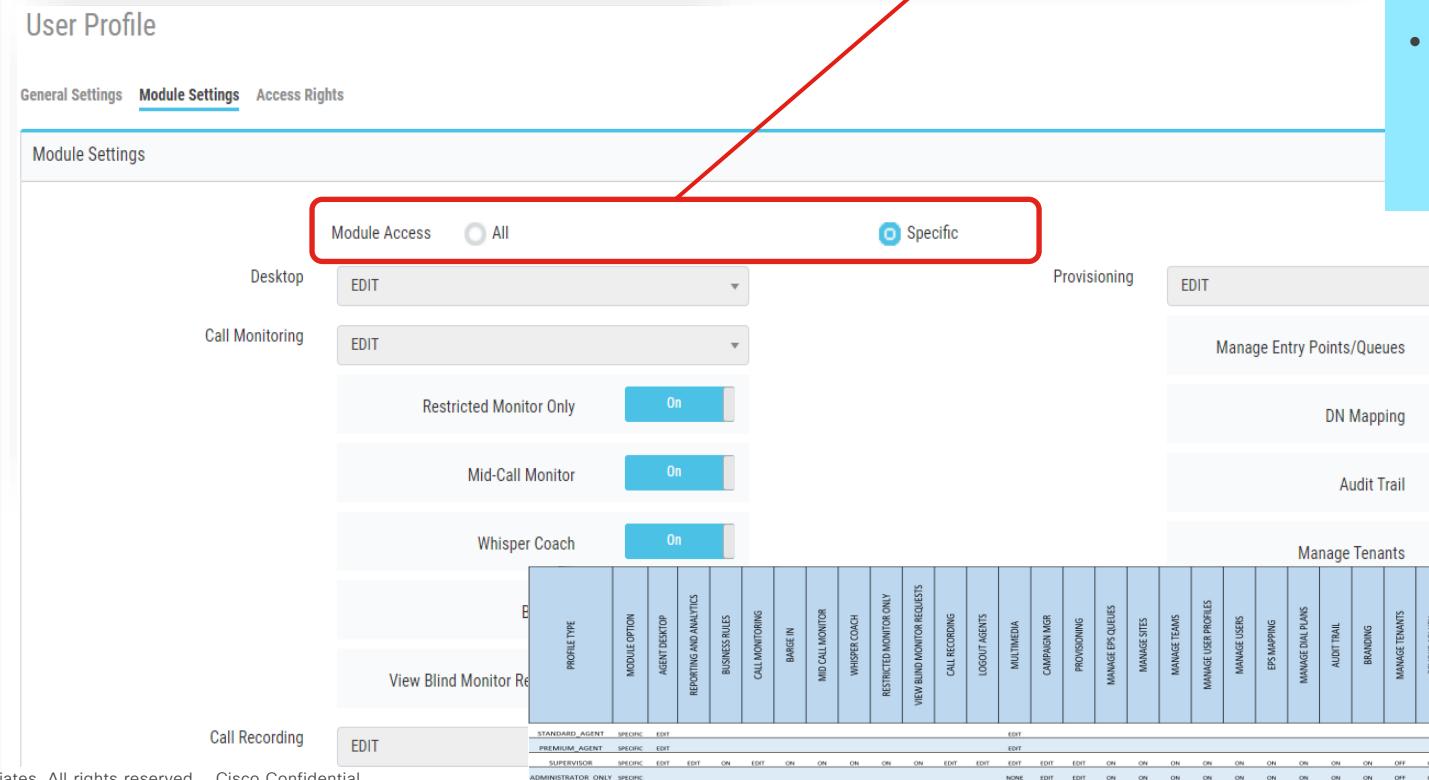
## Entry Point Mappings

## Outdial ANI

## Flows

## Routing Strategy

	A	B	C	D	E
1	Name	Description	Profile Type	Module Option	Agent Desktop
2	AdminProfile	admin profile test	Administrator	All	None
3	SupervisorProfile	supervisor profile test	Supervisor		
4	PremiumAgentProfile	premium agent profile test	Premium Agent		
5	StandardAgentProfile	standard agent profile test	Standard Agent		



- User Profile Name required
  - User Profile Type required
  - All options can be edited later in the portal if desired or configured here
  - Unavailable configuration elements for user type will result in default values

# Profiles

PROFILE TYPE	MODULE OPTION	AGENT DESKTOP	REPORTING AND ANALYTICS	BUSINESS RULES	CALL MONITORING	BARGE IN	MID CALL MONITOR	WHISPER COACH	RESTRICTED MONITOR ONLY	VIEW BLIND MONITOR REQUESTS	CALL RECORDING	LOGOUT AGENTS	MULTIMEDIA	CAMPAIN MGR	PROVISIONING	MANAGE EPS QUEUES	MANAGE SITES	MANAGE TEAMS	MANAGE USER PROFILES	MANAGE USERS	EPS MAPPING	MANAGE DIAL PLANS	AUDIT TRAIL	BRANDING	MANAGE TENANTS	REVOKE API KEY	RECORDING MGMT	MANAGE RECORDINGS	TAGS	CUSTOM ATTRIBUTES	SECURITY KEYS	ROUTING STRATEGY	MANAGE FLOW SCRIPTS	MANAGE MEDIA FILES	WORKFORCE OPTIMIZATION	ACCESS ENTRY POINTS	ACCESS QUEUES	ACCESS SITES	ACCESS TEAMS
STANDARD_AGENT	SPECIFIC	EDIT									EDIT																			ALL	ALL	ALL	ALL						
PREMIUM_AGENT	SPECIFIC	EDIT									EDIT																			ALL	ALL	ALL	ALL						
SUPERVISOR	SPECIFIC	EDIT	EDIT	ON	EDIT	ON	ON	ON	ON	ON	EDIT	EDIT	EDIT	ON	ON	ON	ON	ON	ON	ON	ON	ON	ON	ON	OFF	ON	EDIT	ON	ON	ON	EDIT	ON	ON	ALL	ALL	ALL	ALL		
ADMINISTRATOR_ONLY	SPECIFIC										NONE	EDIT	EDIT	ON	ON	ON	ON	ON	ON	ON	ON	ON	ON	ON	OFF	ON				EDIT	ON	ON	EDIT	ALL	ALL	ALL	ALL		



# Deployment Discovery Sheet Elements

Mandatory

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Blank

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Routing Strategy

A	B	C
Name	Description	Type
1 Relocation discussion		Wrap_Up_Code
2 Service comparison		Idle_Code
3 Issue resolution		Wrap_Up_Code
4 Event planning discuss		Wrap_Up_Code
6 Trash removal discus		Wrap_Up_Code
7 Issue resolution		Wrap_Up_Code
8 Mortgage discussion		Wrap_Up_Code
9 Problem resolution		Wrap_Up_Code
10 Credit card discussio		Wrap_Up_Code
11 Student loan		Wrap_Up_Code
12 Elderly care discussio		Wrap_Up_Code
13 Home accessories di		Wrap_Up_Code
14 Issue resolution		Wrap_Up_Code
15 Flights discussion		Wrap_Up_Code
16 Hotel discussion		Wrap_Up_Code
17 Excursions discussio		Wrap_Up_Code
18 Issue resolution		Wrap_Up_Code
19 Mountain Avenger Re		Wrap_Up_Code
20 New Customer		Wrap_Up_Code
21 Finance		Wrap_Up_Code
22 General Questions		Wrap_Up_Code
23 Work Type		

- Work Types are a grouping of Auxiliary Codes and can be found in reporting under Auxiliary Reports
- Work Types must be created prior to Auxiliary Codes
- Wrap-Up Codes from UCCX are pulled into the Work Types tab of the DDS form

Did you know: CCX also has Wrap Up Reasons as 'categories' with associated wrap up codes under Subsystems – Chat and Email – Wrap Up Reasons

Name	<input type="text"/>
Description	<input type="text"/>
Type	<input checked="" type="radio"/> Idle Code <input type="radio"/> Wrap Up Code
<input type="button" value="Save"/> <input type="button" value="Reset"/> <input type="button" value="Cancel"/>	

# Deployment Discovery Sheet Elements

Mandatory

Optional

Blank

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Routing Strategy

A	B	C
Name	Description	Type
1 Relocation discussion		Wrap_Up_Code
2 Service comparison		Idle_Code
3 Issue resolution		Wrap_Up_Code
4 Event planning discus		Wrap_Up_Code
5 Trash removal discus		Wrap_Up_Code
6 Issue resolution		Wrap_Up_Code
7 Mortgage discussion		Wrap_Up_Code
8 Problem resolution		Wrap_Up_Code
9 Credit card discussio		Wrap_Up_Code
10 Student loan		Wrap_Up_Code
11 Elderly care discussi		Wrap_Up_Code
12 Home accessories di		Wrap_Up_Code

## Wrap-Up Reasons

Save X Cancel

Status: Ready

Category*	City Services Maximum 40 characters
Wrap-Up Reason(s)* (At least one is mandatory)	<input type="text" value="Event planning discussion"/> <input type="text" value="Trash removal discussion"/> <input type="text" value="Issue resolution"/> Maximum 40 characters <span style="float: right;">Add</span>
Tags*	<input checked="" type="radio"/> Global for all CSQs <input type="radio"/> Customize

Save Cancel

## Wrap-Up Reasons

Add New

Status

5 record(s) found

List of Wrap-Up Reasons

Category	Wrap Up Reasons
City Services	Event planning discussion, Issue resolution, Trash removal discussion
Finance	Credit card discussion, Mortgage discussion, Problem resolution, Student loan
HealthCare	Elderly care discussion, Home accessories discussion, Issue resolution
Travel	Excursions discussion, Flights discussion, Hotel discussion, Issue resolution
Utility	Issue resolution, Relocation discussion, Service comparison

Did you know: CCX also has Wrap Up Reasons as 'categories' with associated wrap up codes under Subsystems – Chat and Email – Wrap Up Reasons

# Deployment Discovery Sheet Elements

Mandatory

Optional

Blank

Multimedia Profiles

Sites

User Profiles

Work Types

Auxiliary Codes

Agent Profiles

Address Book

Skill Definition

Skill Profile

Team

Entry Points

Outdial Entry Points

Queues

Outdial Queues

Entry Point Mappings

Outdial ANI

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Routing Strategy

The screenshot shows the 'Auxiliary Codes' section of the Deployment Discovery Sheet. The main table has columns A (Name), B (Description), C (Default), and D (Work Type). The 'Default' column is highlighted with a red box. Below the table is a sub-table titled 'Aux Codes' with tabs for 'Idle Codes' (selected) and 'Wrap Up Codes'. The 'Idle Codes' tab displays a list of codes with columns: Name, Description, Status, Default, and Work Type. Most entries have 'Active' status and '✓' in the Default column, except for 'Email' which has 'Active' in the Status column and '✗' in the Default column.

A	B	C	D
1 Name	Description	Default	Work Type
2 Mountain Avenger	<Customer provided>	On	Default Wrapup Work Type
3 New Customer	<Customer provided>	On	Default Wrapup Work Type
4 Finance	<Customer provided>	On	Default Wrapup Work Type
5 General Questions	<Customer provided>	On	Default Wrapup Work Type
6 Customer Issues	<Customer provided>	On	Default Wrapup Work Type
7 Break	<Customer provided>	On	Default Idle Work Type
8 Lunch	<Customer provided>	On	Default Idle Work Type
9 Meeting	<Customer provided>	On	Default Idle Work Type
10 Training	<Customer provided>	On	Default Idle Work Type
11 End of Shift	<Customer provided>	On	Default Idle Work Type
12 PTO			
13 Supervi			
14 Outbou			
15 Email			
16 Chat			
17 Withdraw			
18 Manual			
19 Omnic			
20 Custom			
21 Non AC			
22 Call Car			
23 Extensi			
24 Skip Pre			
25 Cancel I			
26 Restrict			
27 Restrict			
28 Call End			
29 Phone V			
30 CUCM F			
31 Wrap U			

**Aux Codes** Idle Codes

Name	Description	Status	Default	Work Type
... Agent Logon	<Customer provided>	Active	✓	Default Idle Work Type
... Break	<Customer provided>	Active	✓	Default Idle Work Type
... Call Cancel	<Customer provided>	Active	✓	Default Idle Work Type
... Call Ended	<Customer provided>	Active	✓	Default Idle Work Type
... Call Not Answered	<Customer provided>	Active	✓	Default Idle Work Type
... Cancel Reservation Preview Call	<Customer provided>	Active	✓	Default Idle Work Type
... Chat	<Customer provided>	Active	✓	Default Idle Work Type
... CUCM Failover	<Customer provided>	Active	✓	Default Idle Work Type
... Customer Call Back	<Customer provided>	Active	✓	Default Idle Work Type
... Email	<Customer provided>	Active	✗	Default Idle Work Type

+ New Idle Code

- Values pulled from Finesse Auxiliary Codes
- Requires Name and Type
- Type can be Wrap up or Idle codes

Mandatory

Optional

Blank

# Deployment Discovery Sheet Elements

Multimedia Profiles

Sites

User Profiles

Work Types

Auxiliary Codes

Agent Profiles

Address Book

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Skill Profile

Team

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Flows

Routing Strategy

## Agent Profile

General Information

Auxiliary Codes

Collaboration

Dial Plan

Agent DN Validation

Agent Viewable Statistics

Agent Thresholds

Agent Timeout

### General Information

Name

Agent-Profile

Description

Agent profile

Status

Active

Parent Type

Tenant

Screen Popups

No

Last Agent Routing

No

Parent Type

Site

Parent Name

Site-1

	A	B	C	D	E	F	G	H	I	J
1	Name	Description	Parent Site	Screen Popups	Last Agent Routing	Wrap Up Type	Auto Wrap Up Time	Auto Answer Enabled	Agent Available After OutDial	Alloc
2	<Customer provided>			Off	Off	Manual	60	Off	Off	Off
3										
4										

Confusing? 2 Profiles already exist in the tenant.

- Agent-Profile
- Agent-Profile(Auto\_WrapUp)

- Many elements under Agent Profile that do not exist in UCCX
- Drop down selections available on first line items. Copy/Paste if desired
- Mandatory items are “Name” and “Parent Site”
  - Parent Site will be ‘Tenant’ if left blank

Mandatory

Optional

Blank

# Deployment Discovery Sheet Elements

Multimedia Profiles

Sites

User Profiles

Work Types

Auxiliary Codes

Agent Profiles

**Address Book**

Skill Definition

Skill Profile

Team

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Flows

Routing Strategy

	A	B	C	D	E
1	Name	Description	Parent Site	Entry Name	Phone Number
2	Cumulus		SiteA	Sandra Jefferson	1080
3	Cumulus		SiteA	Josh Peterson	1086
4	Cumulus		SiteA	Rick Barrows	1082
5	Cumulus		SiteA	Ethan Warner	1302
6	Cumulus		SiteA	Evan Woods	1300
7	Cumulus		SiteA	John Whitehead	1304
8	Cumulus		SiteA	Louis Hancock	1303
9	Cumulus		SiteA	Madison Myers	1301
10			SiteA		

- Address book entries come from Finesse.
- The Finesse API will create the entries but may require changes on the DDS
- Label each row with the name of the Address Book followed by a new entry
- Ensure all entries are tied to the correct Address Book name and Site Name

Mandatory

Optional

Blank

# Deployment Discovery Sheet Elements

Multimedia Profiles

Sites

User Profiles

Work Types

Auxiliary Codes

Agent Profiles

Address Book

Skill Definition

Skill Profile

Team

Entry Points

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Outdial Queues

Entry Point Mappings

Outdial ANI

Flows

Routing Strategy

A	B	C	D	E
Name	Description	Service Level Threshold	Type	List Values For Enum
Chat_Skill	Ability to Chat	30	Proficiency	10
CustomerService_skill	Customer Service	30	Proficiency	10
Sales_skill	Sales	30	Proficiency	10
Email_skill	Ability to Email	30	Proficiency	10
Voice_skill	Ability to take a call	30	Proficiency	10
Bowstaff_skill	Napoleon complex	30	Boolean	TRUE

## Skill Definitions

+ New Skill Definition

Name	Description	Type
... Bowstaff_skill	Napoleon complex	Boolean
... Chat_Skill	Ability to Chat	Proficiency
... CustomerService_skill	Customer Service	Proficiency
... Email_skill	Ability to Email	Proficiency
... Sales_skill	Sales	Proficiency
... Voice_skill	Ability to take a call	Proficiency

Mandatory

Optional

Blank

# Deployment Discovery Sheet Elements

Multimedia Profiles

Sites

User Profiles

Work Types

Auxiliary Codes

Agent Profiles

Address Book

Skill Definition

**Skill Profile**

Team

Entry Points

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Outdial Queues

Entry Point Mappings

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Routing Strategy

	A	B	C	D
1	Name	Description	Skill Name	Skill Values
2	Chat Profile	Chat Skillz	Chat_skill	10
3	Chat Profile	Customer Service Sk	CustomerService_sk	10
4	Chat Profile	Bowstaff Skillz	Bowstaff_skill	TRUE
5	Email Profile	Email Skillz	Email_skill	10
6	Email Profile	Customer Service Sk	CustomerService_sk	10
7	Voice Profile	Voice Skillz	Voice_skill	10
8	Voice Profile	Sales skillz	Sales_skill	10

- Skill Profile does not exist in UCCX and must be created for any Skill Definitions
- Mandatory Fields
  - Name
  - Skill Name
  - Skill Type
  - Skill Values
- Use a separate row to define each skill assigned to the same profile

# Deployment Discovery Sheet Elements

Mandatory

Optional

Blank

Multimedia Profiles

Sites

User Profiles

Work Types

Auxiliary Codes

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Routing Strategy

## Skill Profile

[Help](#) [Skill Profiles](#) > Edit

### General Settings

Name Chat Profile

Description Chat Skillz

### Active Skills

Select	Skill Name	Skill Type	Skill Value
<input checked="" type="checkbox"/>	Bowstaff_skill	Boolean	<input checked="" type="radio"/> True <input type="radio"/> False
<input checked="" type="checkbox"/>	Chat_Skill	Proficiency	<div style="width: 100%;">10</div>
<input checked="" type="checkbox"/>	CustomerService_skill	Proficiency	<div style="width: 100%;">10</div>
<input type="checkbox"/>	Email_skill	Proficiency	<div style="width: 0%;">0</div>
<input type="checkbox"/>	Sales_skill	Proficiency	<div style="width: 0%;">0</div>
<input type="checkbox"/>	Voice_skill	Proficiency	<div style="width: 0%;">0</div>

Note: All Skill Definitions exist in Skill Profiles but are only activated if Select is checked and a value is assigned

Mandatory

Optional

Blank

# Deployment Discovery Sheet Elements

Multimedia Profiles

Sites

User Profiles

Work Types

Auxiliary Codes

Agent Profiles

Address Book

Skill Definition

Skill Profile

Team

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Outdial Queues

Entry Point Mappings

Outdial ANI

Flows

Routing Strategy

A	B	C	D	E
Name	Description	Service Level Threshold	Type	List Values For Enum
Chat_Skill	Ability to Cha	30	Proficiency	10
CustomerService_skill	Customer Ser	30	Proficiency	10
Sales_skill	Sales	30	Proficiency	10
Email_skill	Ability to Ema	30	Proficiency	10
Voice_skill	Ability to take	30	Proficiency	10
Bowstaff_skill	Napoleon cor	30	Boolean	TRUE
			Text Proficiency Boolean Enum	

A	B	C	D
Name	Description	Skill Name	Skill Values
Chat Profile	Chat Skillz	Chat_skill	10
Chat Profile	Customer Ser	CustomerService_skill	10
Email Profile	Email Skillz	Email_skill	10
Email Profile	Customer Ser	CustomerService_skill	10
Voice Profile	Voice Skillz	Voice_skill	10
Voice Profile	Sales skillz	Sales_skill	10
Bowstaff Profile	Bowstaff Skill	Bowstaff_skill	TRUE

List Profile rows associated to individual skills for each skill assignment

Mandatory

Optional

Blank

# Deployment Discovery Sheet Elements

Multimedia Profiles

Sites

User Profiles

Work Types

Auxiliary Codes

Agent Profiles

Address Book

Skill Definition

Skill Profile

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Outdial ANI

Flows

Routing Strategy

	A	B	C	D	E	F	G	H
1	Name	Site	Type	Multimedia Profile	Skill Profile	DN	Capacity	Desktop Layout
2	Default	Site-1	Agent	Default_Telephony_Profile	Voice Profile	0	0	Global Layout
3	CumulusMain	SiteA	Agent	Default_Telephony_Profile	Voice Profile	0	0	Global Layout
4	CumulusCorporation	SiteA	Capacity				1	
5	2Ring	SiteB	Agent	Default_Telephony_Profile	Voice Profile	0	0	Global Layout
6	CumulusCRM	SiteA	Agent	Default_Telephony_Profile	Voice Profile	0	0	Global Layout
7								

- “Type” is a drop-down field for either Agent or Capacity Based
  - Capacity based teams do not have MM Profiles, Skill Profiles, DN or Desktop Layout
- Assign Mandatory (red) fields to define the team information
- Capacity should be 1 for any Capacity based team or blank for an Agent based team
- Optional fields will be set to default values if not defined

# Deployment Discovery Sheet Elements

Mandatory  
Optional  
Blank

-  Multimedia Profiles
-  Sites
-  User Profiles
-  Work Types
-  Auxiliary Codes
-  Agent Profiles
-  Address Book
-  Skill Definition
-  Skill Profile
-  Team
-  Entry Points
-  Outdial Entry Points
-  Queues
-  Outdial Queues
-  Entry Point Mappings
-  Outdial ANI
-  Flows
-  Routing Strategy

A	B	C	D	E	F	G	H
1	Name	Site	Type	Multimedia Profile	Skill Profile	DN	Capacity
2	Default	Site-1	Agent	Default_Telephony_Profile	Voice Profile	0	0
3	CumulusMain	SiteA	Agent	Default_Telephony_Profile	Voice Profile	0	0
4	CumulusCorporation	SiteA	Capacity				1
5	2Ring	SiteB	Agent	Default_Telephony_Profile	Voice Profile	0	0
6	CumulusCRM	SiteA	Agent	Default_Telephony_Profile	Voice Profile	0	0
7							

Team

General Settings

Site: Site-1

Name:

Type:  Capacity Based  Agent Based

Advanced Settings

DN:	<input type="text" value="0"/>
Capacity:	<input type="text" value="0"/>
Skill Profile:	<input type="text" value="Select"/>
Multimedia Profile:	<input type="text" value="None"/>
Agents:	<input type="text" value="Select an option"/>
Desktop Layout:	<input type="text" value="Global Layout"/>

This team uses an unmodified Desktop Layout. Therefore, new layout features appear on Desktop upon reload or when the user signs into the Desktop next time.

# Deployment Discovery Sheet Elements

Mandatory

Optional

Blank

Multimedia Profiles

Sites

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Work Types

Auxiliary Codes

Agent Profiles

Address Book

Skill Definition

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Flows

Routing Strategy

	A	B	C	D	E	F
1	Name	Description	Service Level Threshold	Timezone	Channel Type	Social Channel Type
2	UCCX125Voice	UCCX125AppVoice	60	Default (Tenant Time Zone)	Telephony	
3	UCCX125Chat	UCCX125AppChat	60	Default (Tenant Time Zone)	chat	
4	UCCX125Email	UCCX125AppEmail	60	Default (Tenant Time Zone)	Email	
5	UCCX125Social	UCCX125AppSocial	60	Default (Tenant Time Zone)	Social Channel	Facebook Messenger

- Channel Type and Social Channel Type are mandatory drop-down fields
  - If Social Channel is selected it is necessary to choose the Social Channel Type as well
  - Channel Type cannot be changed later once EP has been created
- Entry Point Name and Service Level Threshold are mandatory
- Default Timezone will be used which is the timezone of the Tenant Org

Mandatory

Optional

Blank

# Deployment Discovery Sheet Elements

Multimedia Profiles

Sites

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Auxiliary Codes

Agent Profiles

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Skill Profile

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Flows

Routing Strategy

	A	B	C	D	E
1	Name	Description	Service Level Threshold	Timezone	Channel Type
2	outboundep	outdial ep		60 default	Telephony
3	outboundepsecond	outdial ep 2		60 default	Telephony

- Provide Name , Service Level Threshold and Channel Type for the Outdial Entry Point to be created
- If this sheet is left blank, then no Outdial EP will be created

Mandatory

Optional

Blank

# Deployment Discovery Sheet Elements

 Multimedia Profiles Sites User Profiles Work Types Auxiliary Codes Agent Profiles Address Book Skill Definition Skill Profile Team Entry Points Outdial Entry Points Queues Outdial Queues Entry Point Mappings Outdial ANI Flows Routing Strategy

- Mandatory Fields (drop-down)
  - Queue Routing Type
  - Skill Based Agent Selection
  - Channel Type
  - Routing Type
- For Skill Based Queue Routing Type, select the Agent Selection type from the dropdown
- At least one Call Distribution (CD) group is required.
- If Pause/Resume Enabled is True then provide Recording Pause Duration else default (10 seconds) will be used.
- Default Timezone (tenant default) if no value is posted
- Default music in Queue will be used if not provided.
- Leave all the other columns as it is.



TMI Mike!  
Can we see  
some  
examples?

# Deployment Discovery Sheet Elements

Mandatory

Optional

Blank

- Name, Queue Routing Type, Skill Based Agent Selection, Channel Type and Routing Type are mandatory drop-down fields
- For Skill Based Queue Routing Type, select the Agent Selection type from the dropdown
- Each Queue requires a Distribution Group and Team association. Refer to the included documentation for this extraction tool.

	DISTRIBUTION GROUP	Group 1	Specify each Distribution Group in a new row with the same Queue name. Ex: Group 1, Group 2, etc
	GROUP TEAMS	My_Team1:My_Site My_Team2:My_Site	Provide Team Name and Site Name separated by colon. Multiple such pairs can be specified by using the pipe separator.

A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P
1 Name	Description	Distribution Group	Distributio	Group Failb	Group Teams	Skill Based Agent Sel	Channel Type	Routing Type	Permit Mc	Permit Reco	Record All C	Pause Or Re	Recording P	Service Level T	Max Time in Queue
2 Chat Recall	Chat Recall	Group 1		1	0	CumulusMain:SiteA	BEST_AVAILABLE_AGI TELEPHONY	SKILL_BASED	Off	Off	Off	Off	10	5	60
3 ChatBot	ChatBot	Group 1				CumulusCorporation:Si	BEST_AVAILABLE_AGI CHAT	LONGEST_AVAILABLE_AGOFF	Off	Off	Off	Off	10	5	60
4 Cumulus Travel	Cumulus Tra	Group 1		1	0	CumulusMain:SiteA	BEST_AVAILABLE_AGI OTHERS	LONGEST_AVAILABLE_AGOFF	Off	Off	Off	Off	10	5	60
5 Sales_CSQ	Sales_CSQ	Group 1		1	0	CumulusMain:SiteA	BEST_AVAILABLE_AGI TELEPHONY	LONGEST_AVAILABLE_AGOFF	Off	Off	Off	Off	10	5	60

Queues

Call Distribution

Add a Call Distribution Group to associate one or more teams with this queue. Add multiple groups to distribute calls to more teams as time in queue progresses. Note that call distribution acts independently from other queue login defined in routing flows.

+ Add Group



# Deployment Discovery Sheet Elements

Mandatory

Optional

Blank

- Name, Queue Routing Type, Skill Based Agent Selection, Channel Type and Routing Type are mandatory drop-down fields
- For Skill Based Queue Routing Type, select the Agent Selection type from the dropdown
- Each Queue requires a Distribution Group and Team association. These must be on a separate row in the csv for Bulk Operations.

	DISTRIBUTION GROUP	Group 1	Specify each Distribution Group in a new row with the same Queue name. Ex: Group 1, Group 2, etc
	GROUP TEAMS	My_Team1:My_Site My_Team2:My_Site	Provide Team Name and Site Name separated by colon. Multiple such pairs can be specified by using

A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	
1	Name	Description	Distribution Group	Distributio	Group Fallb	Group Teams	Skill Based Agent Sel	Channel Type	Routing Type	Permit Mc	Permit Reco	Record All C	Pause Or Re	Recording F	Service Level T Max Time in Queue	
2	Chat Recall	Chat Recall	Group 1		1	0 CumulusMain:SiteA	BEST_AVAILABLE_A	TELEPHONY	SKILL_BASED	Off	Off	Off	Off	10	5	60
3	ChatBot	ChatBot	Group 1			CumulusCorporation:Si	BEST_AVAILABLE_A	CHAT	LONGEST_AVAILABLE_A	Off	Off	Off	Off	10	5	60
4	Cumulus Travel	Cumulus Tra	Group 1		1	0 CumulusMain:SiteA	BEST_AVAILABLE_A	OTHERS	LONGEST_AVAILABLE_A	Off	Off	Off	Off	10	5	60
5	Sales_CSQ	Sales_CSQ	Group 1		1	0 CumulusMain:SiteA	BEST_AVAILABLE_A	TELEPHONY	LONGEST_AVAILABLE_A	Off	Off	Off	Off	10	5	60

Queues

Call Distribution

Add a Call Distribution Group to associate one or more teams with this queue. Add multiple groups to distribute calls to more teams as time in queue progresses. Note that call distribution acts independently from other queue login defined in routing flows.

+ Add Group



# Deployment Discovery Sheet Elements

Mandatory

Optional

Blank

- Name, Queue Routing Type, Skill Based Agent Selection, Channel Type and Routing Type are mandatory drop-down fields
- For Skill Based Queue Routing Type, select the Agent Selection type from the dropdown
- Each Queue requires a Distribution Group and Team association. These must be on a separate row in the csv for Bulk Operations.

	DISTRIBUTION GROUP	Group 1	Specify each Distribution Group in a new row with the same Queue name. Ex: Group 1, Group 2, etc
	GROUP TEAMS	My_Team1:My_Site My_Team2:My_Site	Provide Team Name and Site Name separated by colon. Multiple such pairs can be specified by using the pipe separator.

A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q
1	Name	Description	Distribution Group	Group Selection	Group Fallback Time	Group Teams	Skill Based Agent Selection	Channel Type	Routing Type	Permit Monitor	Permit Record	Record All Calls	Pause Or Re-Recording	Service Level	Max Time in Call	Default Music in Time
2	Chat Recall	Chat Recall				BEST_AVAILABLE_SITE	TELEPHONY	SKILL_BASED	Off	Off	Off	Off	10	5	60	defaultmusic_on_hold
3	Chat Recall		Group 1		1	CumulusMain:SiteA	BEST_AVAILABLE_CHAT	LONGEST_AVAILABILITY	Off	Off	Off	Off	10	5	60	defaultmusic_on_hold
4	ChatBot	ChatBot				CumulusCorporation:SiteA	BEST_AVAILABLE_OTHERS	LONGEST_AVAILABILITY	Off	Off	Off	Off	10	5	60	defaultmusic_on_hold
5	ChatBot		Group 1			CumulusMain:SiteA	BEST_AVAILABLE_TELEPHONY	LONGEST_AVAILABILITY	Off	Off	Off	Off	10	5	60	defaultmusic_on_hold
6	Cumulus Travel	Cumulus Travel				CumulusMain:SiteA	BEST_AVAILABLE_EMAIL	LONGEST_AVAILABILITY	Off	Off	Off	Off	10	5	60	defaultmusic_on_hold
7	Cumulus Travel		Group 1		1	CumulusMain:SiteA	BEST_AVAILABLE_SOCIAL_CHANNEL	LONGEST_AVAILABILITY	Off	Off	Off	Off	10	5	60	defaultmusic_on_hold
8	Sales_CSQ	Sales_CSQ				CumulusMain:SiteA										
9	Sales_CSQ		Group 1		1	CumulusMain:SiteA										
10	Web Guest	Web Guest				CumulusMain:SiteA										
11	Facebook	Facebook				CumulusMain:SiteA										

## Call Distribution

Add a Call Distribution Group to associate one or more teams with this queue. Add multiple groups to distribute calls to more teams as time progresses. Note that call distribution acts independently from other queue login defined in routing flows.

Queues

[+ Add Group](#)


# Deployment Discovery Sheet Element

- Name, Queue Routing Type, Skill Based Agent Selection, Channel Type and Routing Type are mandatory drop-down fields
- For Skill Based Queue Routing Type, select the Agent Selection type from the dropdown
- Each Queue requires a Distribution Group and Team association. These must be on a separate row in the csv for Bulk Operations.

A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	
1 Name	Description	Distribution Grc	Distribution Group Se	Group Fallback Tim	Group Teams	Skill Based Agent S	Channel Type	Routing Type	Permit Monit	Permit Record	Record All Ca	Pause Or Re:	Recording	Service Level	Max Time in C	Default Music in Tim	
2 Chat Recall	Chat Recall					BEST_AVAILABLE_ATELEPHONY		SKILL_BASED	Off	Off	Off	Off	10	5	60	defaultmusic_on_h	
3 Chat Recall		Group 1															
4 ChatBot	ChatBot		Group 1	1	0 CumulusMain:SiteA		BEST_AVAILABLE_CHAT		LONGEST_AVAILAB	Off	Off	Off	10	5	60	defaultmusic_on_h	
5 ChatBot																	
6 Cumulus Travel	Cumulus Travel					CumulusCorporation:SiteA											
7 Cumulus Travel							BEST_AVAILABLE_OTHERS										
8 Sales_CSQ	Sales_CSQ					1	0 CumulusMain:SiteA		LONGEST_AVAILAB	Off	Off	Off	10	5	60	defaultmusic_on_h	
9 Sales_CSQ																	
10 Web Guest	Web Guest						1	0 CumulusMain:SiteA		LONGEST_AVAILAB	Off	Off	Off	10	5	60	defaultmusic_on_h
11 Facebook	Facebook							BEST_AVAILABLE_EMAIL									

**New Row with Queue Name**

**CumulusMain:SiteA**

**Queue Routing Type Skills Based**

**Agent Selection**

Longest Available Agent  
If multiple agents meet the skill criteria for the contact, select the agent who has been idle for the longest.

Best Available Agent  
If multiple agents meet the skill criteria for the contact, select the agent with highest proficiency in the required skills.

**Chat Distribution**

**Group1**

**Teams**

**Team Name** CumulusMain      **Site Name** SiteA

**Team Type** Agent Based

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# DDS Queues Explained

	DISTRIBUTION GROUP	Group 1	Specify each Distribution Group in a new row with the same Queue name. Ex: Group 1, Group 2, etc
	GROUP TEAMS	My_Team1:My_Site My_Team2:My_Site	Provide Team Name and Site Name separated by colon. Multiple such pairs can be specified by using the pipe separator.

- Queue Routing Type, Skill Based Agent Selection, Channel Type and Routing Type are mandatory drop-down fields
- For Skill Based Queue Routing Type, Please select the Agent Selection type from the dropdown
- Each Queue requires a Distribution Group and Team association. Refer to the included documentation for this extraction tool.

A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	
1 Name	Description	Distribution Group	Distributio	Group Fallb	Group Teams	Skill Based Agent Sel	Channel Type	Routing Type	Permit Mc	Permit Reco	Record All C	Pause Or Re	Recording P	Service Level T	Max Time in Queue	
2 Chat Recall	Chat Recall	Group 1		1	0 CumulusMain:SiteA	BEST_AVAILABLE_AGI	TELEPHONY	SKILL_BASED	Off	Off	Off	Off	10	5	60	
3 ChatBot	ChatBot	Group 1			CumulusCorporation:Si	BEST_AVAILABLE_AGI	CHAT	LONGEST_AVAILABLE_AC	Off	Off	Off	Off	10	5	60	
4 Cumulus Travel	Cumulus Tra	Group 1		1	0 CumulusMain:SiteA	BEST_AVAILABLE_AGI	OTHERS	LONGEST_AVAILABLE_AC	Off	Off	Off	Off	10	5	60	
5 Sales_CSQ	Sales_CSQ	Group 1			1	0 CumulusMain:SiteA	BEST_AVAILABLE_AGI	TELEPHONY	LONGEST_AVAILABLE_AC	Off	Off	Off	Off	10	5	60

Queue Routing Type Skills Based

Agent Selection  Longest Available Agent  
If multiple agents meet the skill criteria for the contact, select the agent who has been idle for the longest.

Best Available Agent  
If multiple agents meet the skill criteria for the contact, select the agent with highest proficiency in the required skills.

Chat Distribution

Group1

Teams

Team Name Site Name Team Type

CumulusMain SiteA Agent Based

# DDS Queues Explained

	DISTRIBUTION GROUP	Group 1	Specify each Distribution Group in a new row with the same Queue name. Ex: Group 1, Group 2, etc
	GROUP TEAMS	My_Team1:My_Site My_Team2:My_Site	Provide Team Name and Site Name separated by colon. Multiple such pairs can be specified by using the pipe separator.

- Queue Routing Type, Skill Based Agent Selection, Channel Type and Routing Type are mandatory drop-down fields
- For Skill Based Queue Routing Type, Please select the Agent Selection type from the dropdown
- Each Queue requires a Distribution Group and Team association. Refer to the included documentation for this extraction tool.

AutoSave (● Off) Mike Turnbow (miturnbo) MT

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M15

Name	Description	Distribution Group	Distribution Group S	Group Fallback Tim	Group Teams	Skill Based Agent Selection	Channel Type	Routing Type	Permit Monitoring	Permit Recording	Record All Calls	Pause Or Resume	Enable Recording	Pause Duration	Service Level Threshold	Max
1 Chat Recall	Chat Recall	Group1				BEST_AVAILABLE_AGENT	TELEPHONY	SKILL_BASED	Off	Off	Off	Off	10	5	60	
2 ChatBot	ChatBot					BEST_AVAILABLE_AGENT	CHAT	LONGEST_AVAILABLE_AGENT	Off	Off	Off	Off	10	5	60	
3 administrator	administrator					BEST_AVAILABLE_AGENT	FAX	LONGEST_AVAILABLE_AGENT	Off	Off	Off	Off	10	5	60	
4 Cumulus Travel	Cumulus Travel					BEST_AVAILABLE_AGENT	OTHERS	LONGEST_AVAILABLE_AGENT	Off	Off	Off	Off	10	5	60	
5 Sales_CSQ	Sales_CSQ					BEST_AVAILABLE_AGENT	TELEPHONY	LONGEST_AVAILABLE_AGENT	Off	Off	Off	Off	10	5	60	
6 Facebook	Facebook					BEST_AVAILABLE_AGENT	EMAIL	LONGEST_AVAILABLE_AGENT	Off	Off	Off	Off	10	5	60	
7 Web Guest	Web Guest					BEST_AVAILABLE_AGENT	SOCIAL_CHANNEL	LONGEST_AVAILABLE_AGENT	Off	Off	Off	Off	10	5	60	

TestTeam:SiteA

Queue Routing Type Skills Based

Agent Selection  Longest Available Agent  
If multiple agents meet the skill criteria for the contact, select the agent who has been idle for the longest.

Best Available Agent  
If multiple agents meet the skill criteria for the contact, select the agent with highest proficiency in the required skills.

Chat Distribution

Group1

Teams

Team Name Site Name Team Type

TestTeam SiteA Agent Based

# Deployment Discovery Sheet Elements

Mandatory

Optional

Blank

Multimedia Profiles

Sites

User Profiles

Work Types

Auxiliary Codes

Agent Profiles

Address Book

Skill Definition

Skill Profile

Team

Entry Points

Outdial Entry Points

Queues

Outdial Queues

Entry Point Mappings

Outdial ANI

**Outdial Queue**

**General Settings**

Name	Outdial Queue-1
Description	Outdial Queue created by system
Type	Outdial Queue
Channel Type	Telephony
Status	Active

**Contact Routing Settings**

Enable Outbound Campaign or Web Callback	No
--	----

**Advanced Settings**

Permit Monitoring	No
Permit Recording	No
Record All Calls	No
Pause/Resume Enabled	No
Service Level Threshold	120
Maximum Time in Queue	600
Default Music in Queue	defaultmusic_on_hold.wav
Time Zone (Routing Strategies Only)	(GMT-06:00) Central Standard Time (America/Chicago)

**Refer Queue slide to populate Call Distribution groups.**

- If Pause/Resume Enabled is True then provide Recording Pause Duration else default (10 seconds) will be used.
- Default Timezone will be used which is the time zone of the Tenant Org
- Default music in Queue will be used if not provided.
- If Enable Outbound Campaign or Web Callback is toggled to YES
  - Add Group to the DDS Spreadsheet in the same way as done for Queue

A	B	C	D	E	F	G	H	I	J	K	L	M
1 Name	Description	Max Time in Queue	Service Level Threshold	Timezone	Distribution Group	Permit Monitor	Permit Rec	Record All	Pause Or Resu	Recording Pau	Default Music in Queue	Routing Type
2 CumulusOutboundPreview	Cumulus Outbound Prev60	60			Off	Off	Off	Off	Off	10	defaultmusic_on_hold.wav	LONGEST_AVAILABLE_AGENT

Mandatory

Optional

Blank

# Deployment Discovery Sheet Elements

Multimedia Profiles

Sites

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Work Types

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Flows

Routing Strategy

	A	B
1	Dialed Number	Entry Point
2	6021	CumulusSetOpenClose
3	6016	CumulusInbound
4	7706XXXXXXXXXX	CumulusConversationalIVR
5	6017	CumulusMobile
6	6018	CumulusWXM
7	6019	Cumulus2Ring
8	6100	Cumulus2RingPark
9	3015	Survey
10	4050	HTTP_Callback
11	7805	Cumulus Utility
12	7801	Cumulus Finance
13	7802	Cumulus Travel
14	7803	Cumulus HealthCare
15	7804	Cumulus City
16	4000	CumulusOutboundIVR

- Refer to Entry Point Sheet to use the Entry Points to map the dialed numbers here
  - Note: Ensure Entry Point Name appears exactly as it does on the Entry Point sheet
  - Note: Not all Entry Points require a DN mapping
  - Note: Dialed Numbers must exist in Control Hub

# Deployment Discovery Sheet Elements

Mandatory

Optional

Blank

Multimedia Profiles

Sites

User Profiles

Work Types

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Outdial Entry Points

Queues

Outdial Queues

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Flows

Routing Strategy

	Name	Description	Entry Name	Entry Number
1	Sales	Sales Outdial	Product Sales	2149871313
2	Sales	Sales Outdial	Warranty Sales	9729873131
3	Sales	Sales Outdial	Sales Support	8009991111
4				
5				
6				

Outdial ANI

General Settings

Name: Sales  
Description: Sales Outdial

Outdial ANI Entry List

#	Name	Number	Action
No records available			

Save Reset Cancel

- If there are multiple rows for the same Outdial ANI name, create multiple rows in the sheet having the same Outdial ANI name but separate Entry Name.



The bridge to possible