Webex Contact Center Expert

Tenant Portal Provisioning

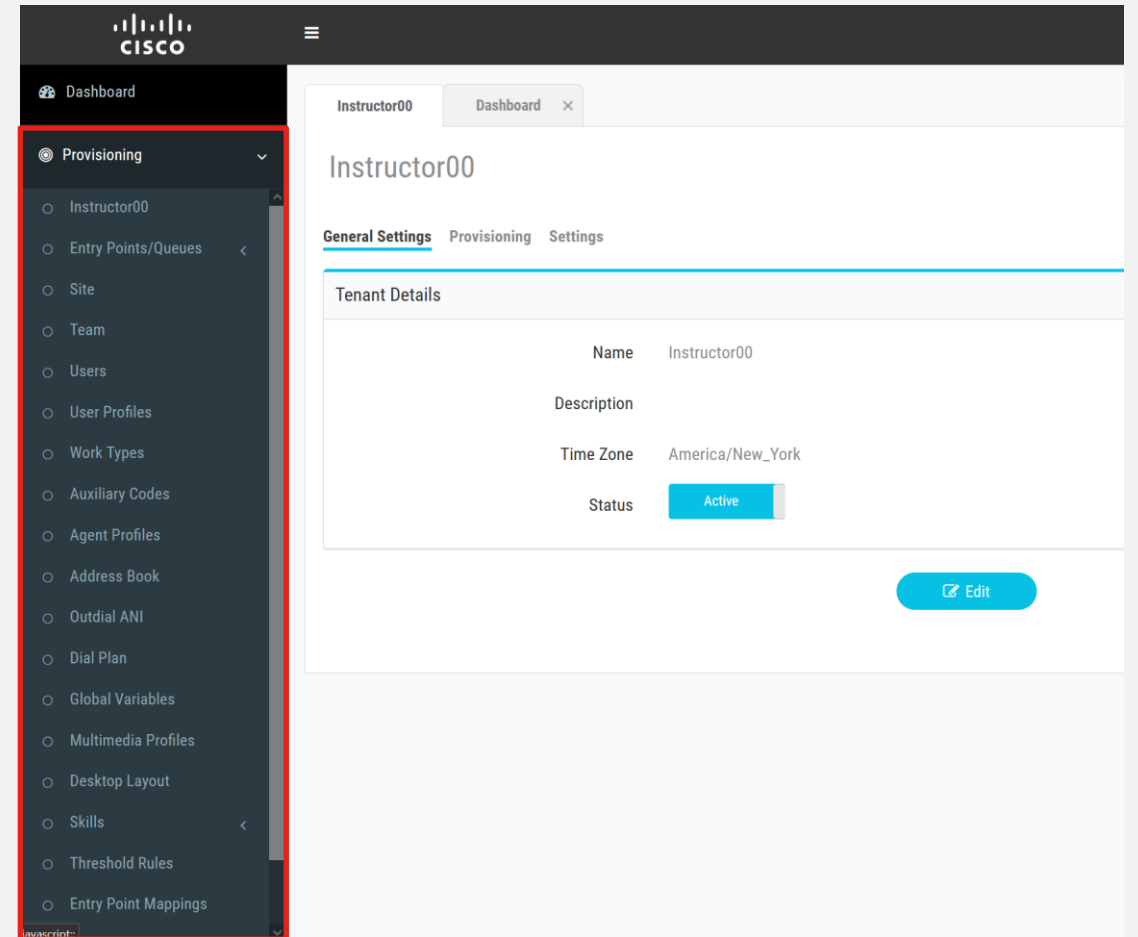Module 4

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by CISCO

Module Objectives

- Understanding the WXCC Tenant Structure and its Roles

- Learning the logical steps of provisioning a new Contact Center

  - Multimedia Profile

  - Sites and Teams

  - Agent Profile

  - User Profiles

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Tenant Portal

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Tenant Portal

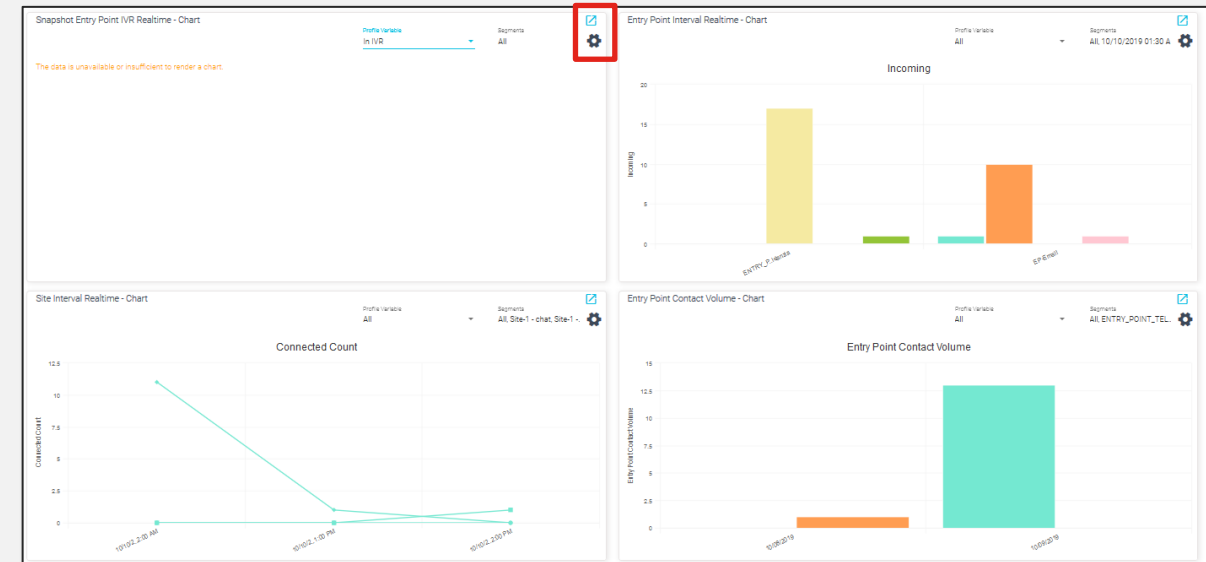## Provisioning

- Simple menu Structure

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Tenant Portal

Real-Time Dashboard

The Dashboard Entry Screen provides a quick overview of the Contact Center

- **Snapshot Entry Point** IVR Realtime (Chart)
- **Interval Entry Point** Realtime (Chart)
- **Interval Site** Realtime (Chart)
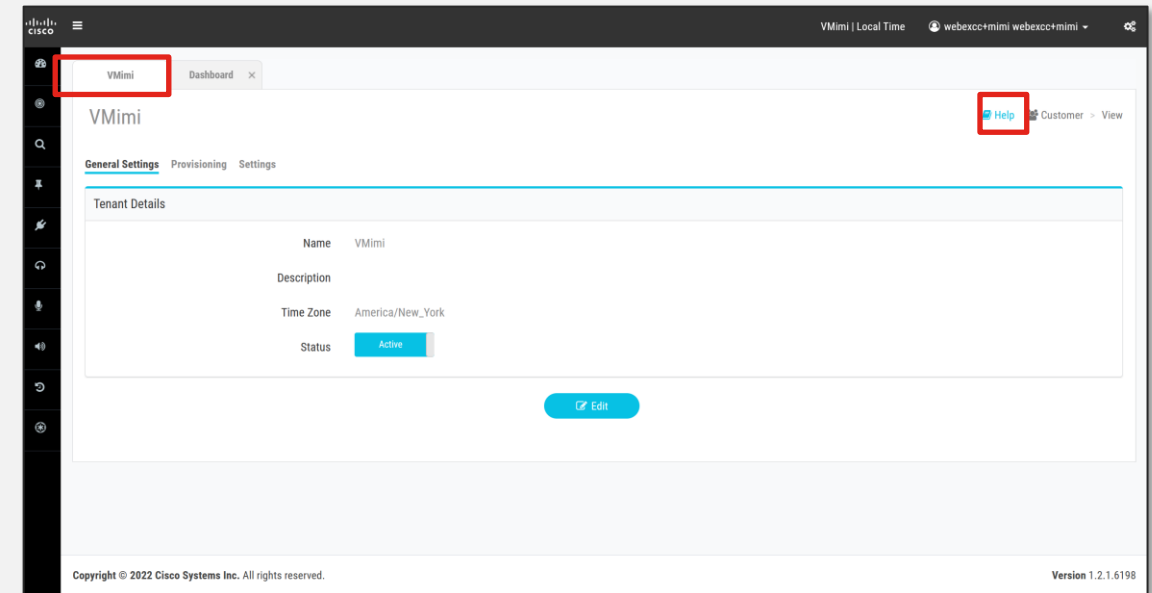- **Entry Point Contact** Daily Volume (Chart)

Each Report can be opened in **Analyzer**

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Tenant Portal

Tenant Settings

- Tenant Admin can manage the following Tenant Settings:
  - General Settings
  - Provisioning
  - Settings
- The online Help can be useful to better understand these settings

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Tenant Portal

General Settings

- Settings like:
  - Tenant Name,
  - Time Zone

- The Settings in gray cannot be changed by the Tenant Admin

General Settings Provisioning Settings

Tenant Details

Name	Instructor00
Description	
Time Zone	America/New_York
Status	Active

Edit

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Tenant Settings

Provisioning

- These settings cannot be changed by the Tenant Admin

- They are enabled according to the Add-on licenses purchased via CCW

General Settings **Provisioning** Settings

System Profile

Workforce Options   No

Campaign Management   No

Speech Enabled IVR   No

 Edit

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Tenant Settings

Settings

- Settings like:
  - Call Settings
    - Thresholds
  - Concurrent Voice Contact Settings
  - Timeout Settings
  - Other Settings
    - Recording
    - Pause Duration
- These are global default settings applicable to all Tenant

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Lab 2

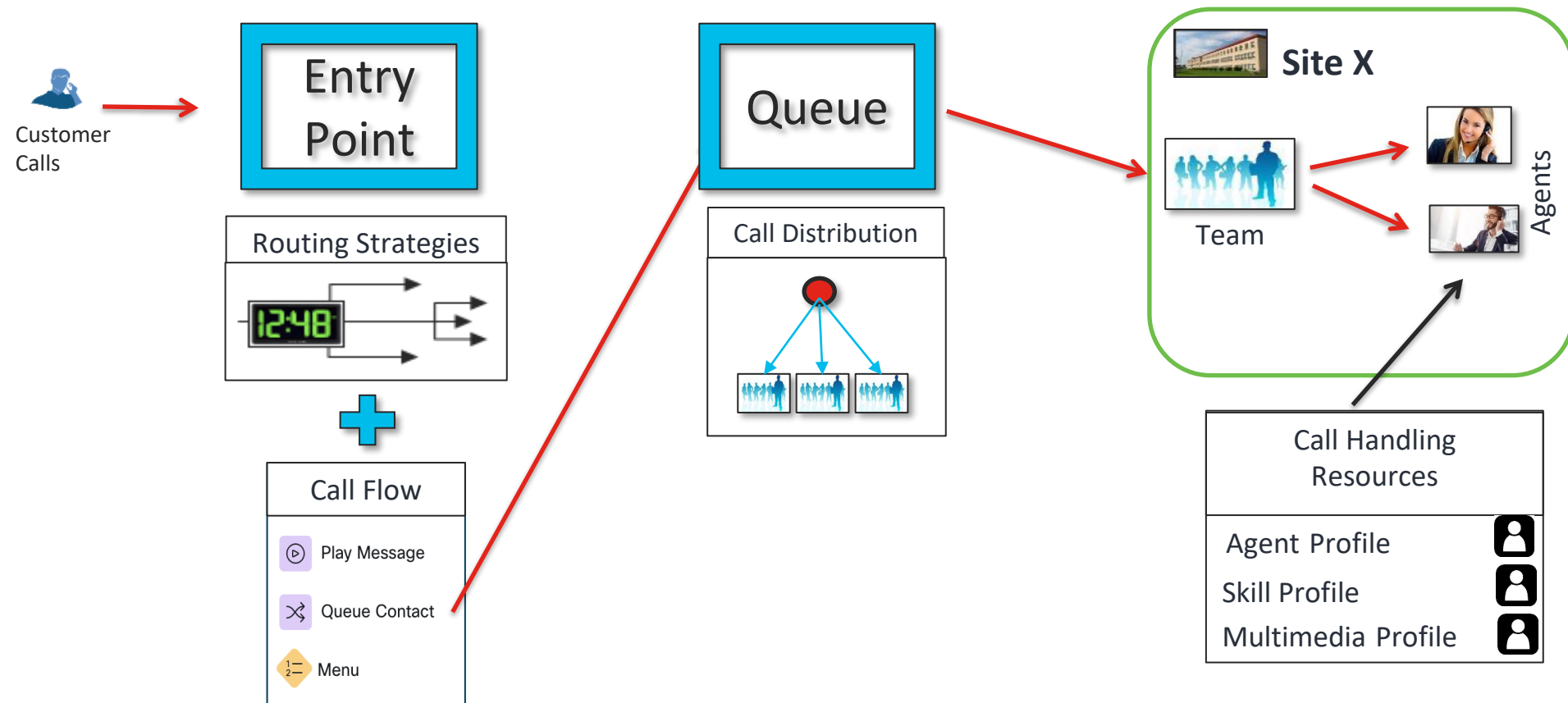## Configuring Tenant Global Settings

- *Estimated Time: 30 minutes*

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Contact Center Concepts
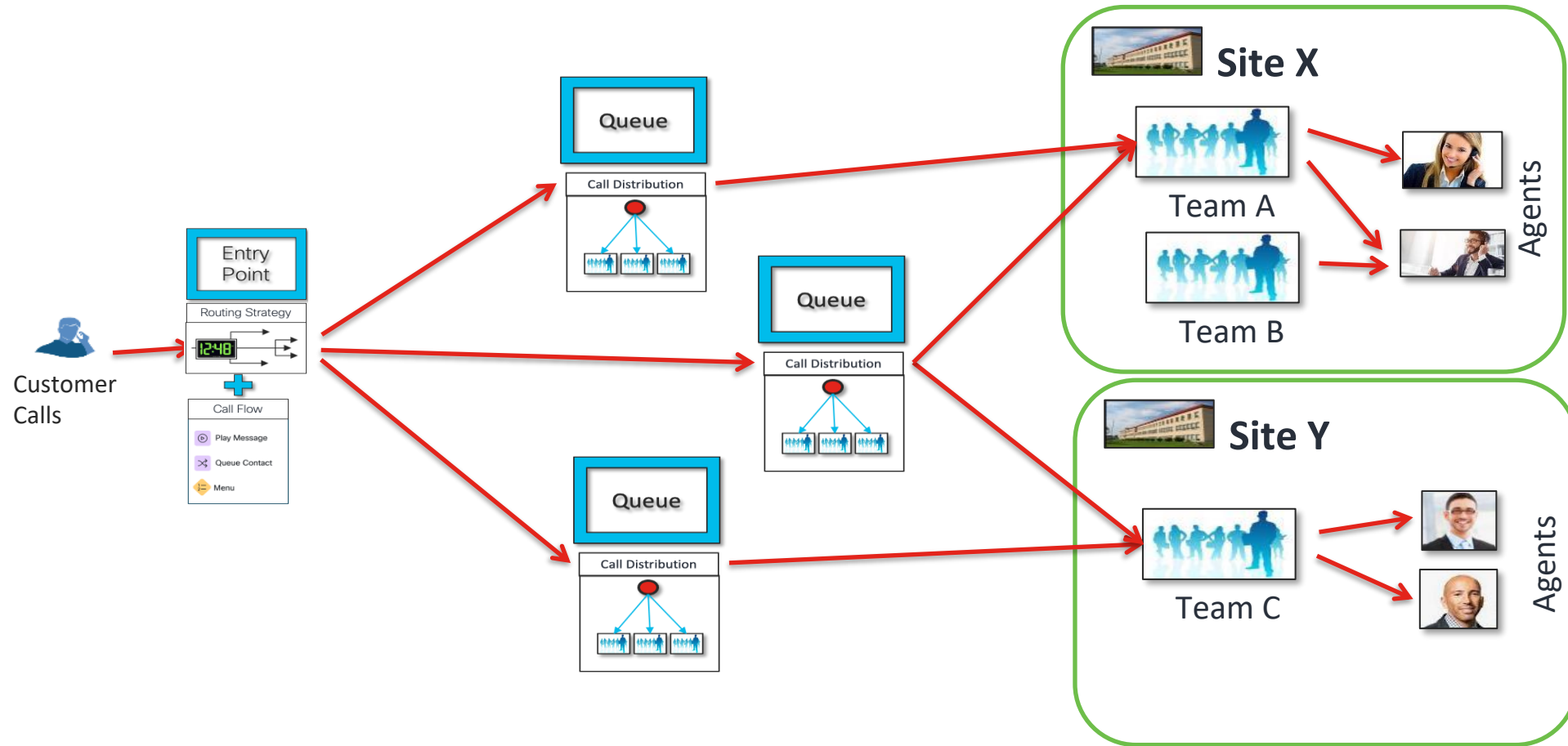
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Definitions

Tenant	An Enterprise (Customer) that has Contact Center services at one or more Sites
Tenant Admin	Webex Contact Center Administrator (Customer Level), assigned in Control Hub.

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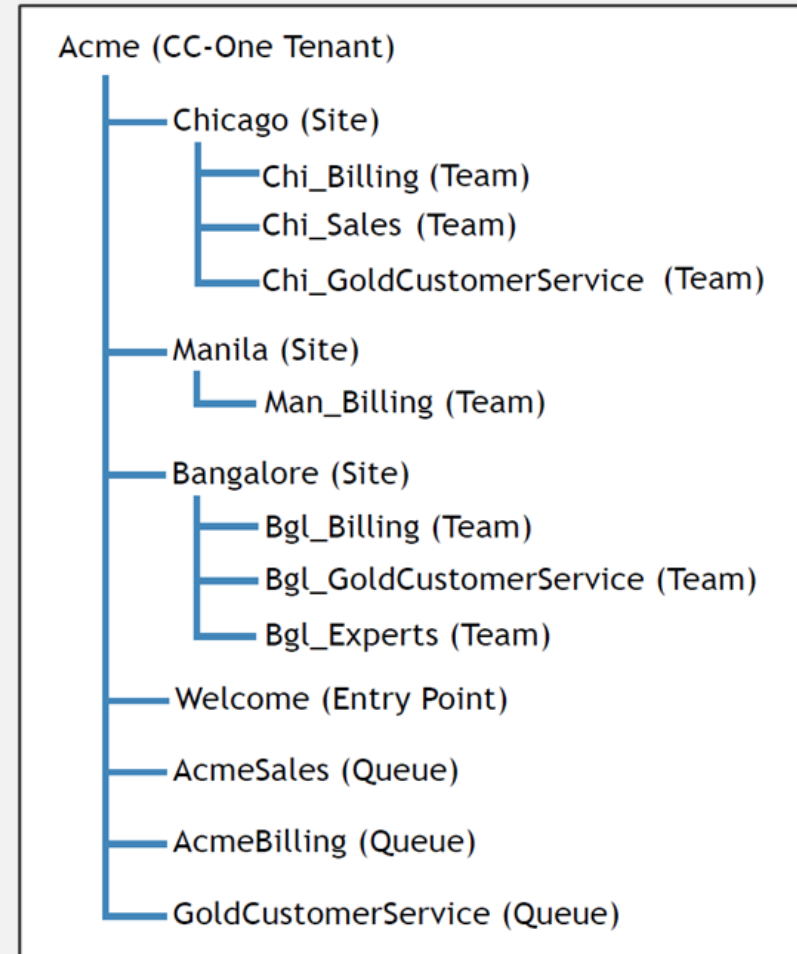# Concepts and Terminology

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Concepts and Terminology

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Definitions

Tenant	An Enterprise that has CC services at one or more Sites
Tenant Admin	Webex Contact Center enterprise administrator
Entry Point	Initial landing place for customer calls in case of Telephony channel* Entry Points can also serve other channels: Chat, Email, etc
Site	Webex Contact Center location controlled by the Tenant
Team	Group of Agents at a specific site
Queue	It is where calls/multimedia are kept while they await handling by an Agent
Agent	User who handles incoming or outgoing customer calls/multimedia for a Tenant

*One or more numbers can be associated with an entry point.

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Example of
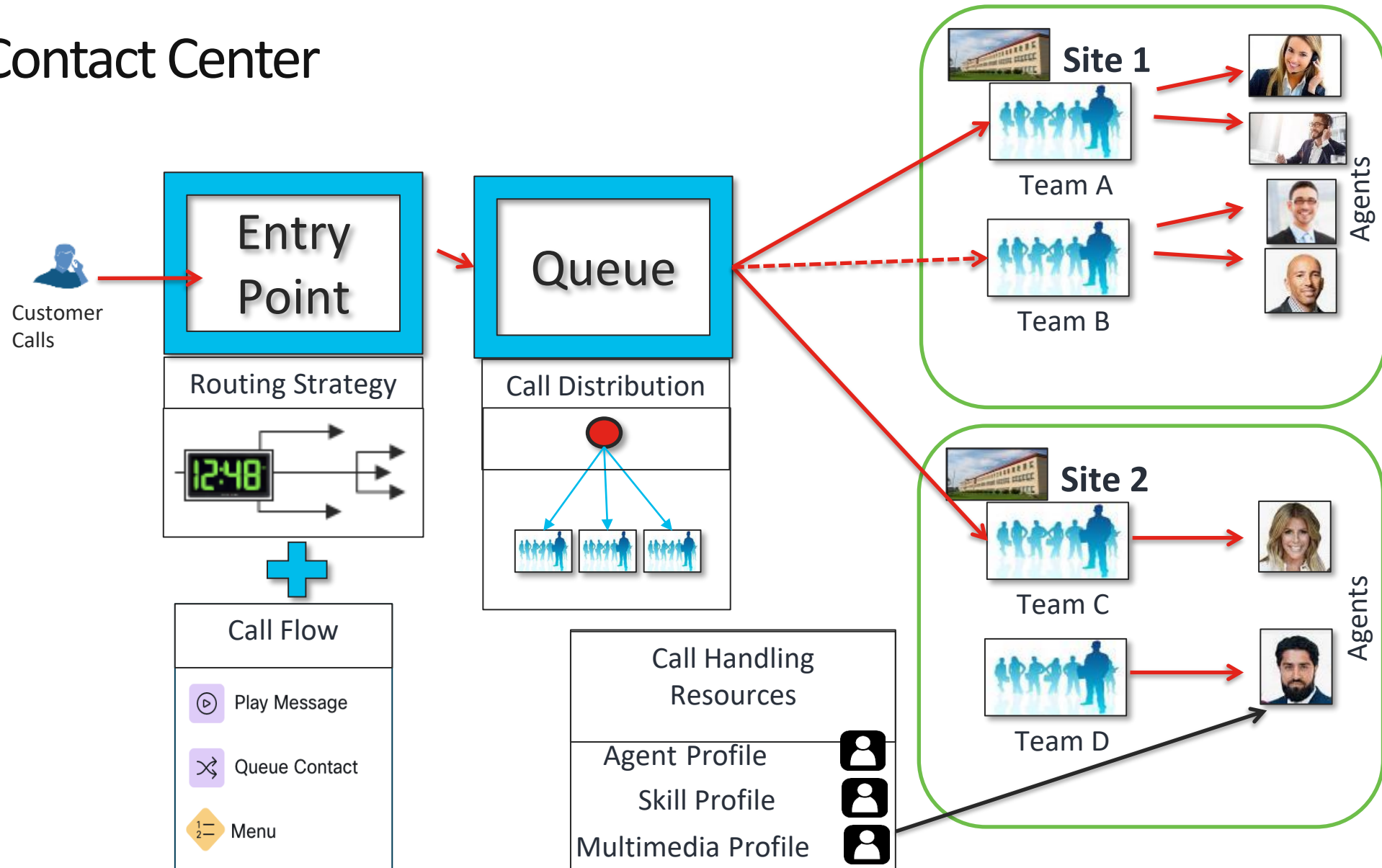
- Example Tenant Profile Hierarchy

Tenant Hierarchy

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Building a New Contact Center

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Our Contact Center

Customer Calls

Entry Point

Routing Strategy

Call Flow

- ▷ Play Message
- ⤫ Queue Contact
- ◇ Menu

Queue

Call Distribution

Call Handling Resources

Agent Profile

Skill Profile

Multimedia Profile

Site 1

Team A

Team B

Agents

Site 2

Team C

Team D

Agents

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Definitions

Skill	It represents a characteristic to allow incoming calls to be distributed to Agents. It can be proficiency, boolean, text, enum

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Skill

- Proficiency

  - Can have a value ranging from 0 to 10 that represents the agent's level of expertise in the skill.

- Boolean

  - Can have the value of True or False to indicate whether or not the agent has the skill.

- Text

  - A free-form text skill that must be matched exactly.

- Enum

  - A named set of predefined values. For example, a skill named Line of Business might have a set of three values: Sales, Service, and Billing.

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Definitions

Skill	It represents a characteristic to allow incoming calls to be distributed to Agents. It can be proficiency, boolean, text, enum
Skill Profile - Agents	A skill profile is a set of Skills, each with an assigned value, that can be assigned to an agent-based Team or to an individual Agent

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Skill Profile

- Select the skills required for the Agent's Profile.

- Set the level of the skills

- If a skill profile is assigned to a team, all agents logged in to that team are associated with that skill profile unless the agent is assigned a specific skill profile.

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Definitions

Skill	It represents a characteristic to allow incoming calls to be distributed to Agents. It can be proficiency, boolean, text, enum
Skill Profile - Agents	A skill profile is a set of Skills, each with an assigned value, that can be assigned to an agent-based Team or to an individual Agent
Multimedia Profile- Agents	It specifies how many of each media type the agent can handle concurrently. Multimedia profiles can be assigned to Teams and individual Agents

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Multimedia Profile

- Each profile specifies the number of each type of media the agent can handle depending on the mode selected.

  - Blended

  - Blended Real-Time

  - Exclusive

- You can assign multimedia profiles to sites, teams, or individual agents.

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Relationship Model

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Lab 3

Provisioning Skills, Skill Profiles and MM Profiles

- *Estimated Time: 25   minutes*

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LAB 3 Expected Outcomes

Call Handling Resources	
Skill Profile	👤
Multimedia Profile	👤

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LAB 3

Skills

SKILL	TYPE
English	Proficiency
German	Proficiency
WXCC Certified	Boolean

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LAB 3

Skill Profiles

| PROFILE	ENGLISH	GERMAN	WXCC CERTIFIED
Profile 1	9	3	Yes
Profile 2	9	3	No
Profile 3	3	9	Yes
Profile 4	3	9	No

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Definitions

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Multimedia Profile-Agents	It specifies how many of each media type the agent can handle concurrently. Multimedia profiles can be assigned to Teams and individual Agents
Team	A team is a group of people who support a specific group of functions.

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Agent Based Teams

- Agents have to use the Desktop clients

- An Agent can only log in to one Team at a time

- When an agent is selected, a call is placed to the phone number Agent entered at login

  - Queued calls are distributed to Teams according to the Queue Routing Strategy

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Capacity Based Teams

- Each capacity-based Team has an associated phone number

- When a capacity-based team is selected, a call is placed to that phone number

- Calls in excess of the specified capacity for the Team are queued

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Definitions

Skill	It represents a characteristic to allow incoming calls to be distributed to Agents. It can be proficiency, boolean, text, enum
Skill Profile - Agents	A skill profile is a set of Skills, each with an assigned value, that can be assigned to an agent-based Team or to an individual Agent
Multimedia Profile- Agents	It specifies how many of each media type the agent can handle concurrently. Multimedia profiles can be assigned to Teams and individual Agents
Team	A team is a group of people who support a specific group of functions.
Site	A Site is usually a physical call center location under the control of the enterprise.

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Sites

- When you create a site, the system automatically adds a team and a multimedia profile to the new site. You can change the team name and other settings, but cannot change the team type from Capacity based to Agent based. Do not delete the team without adding another team for the new site

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Relationship Model

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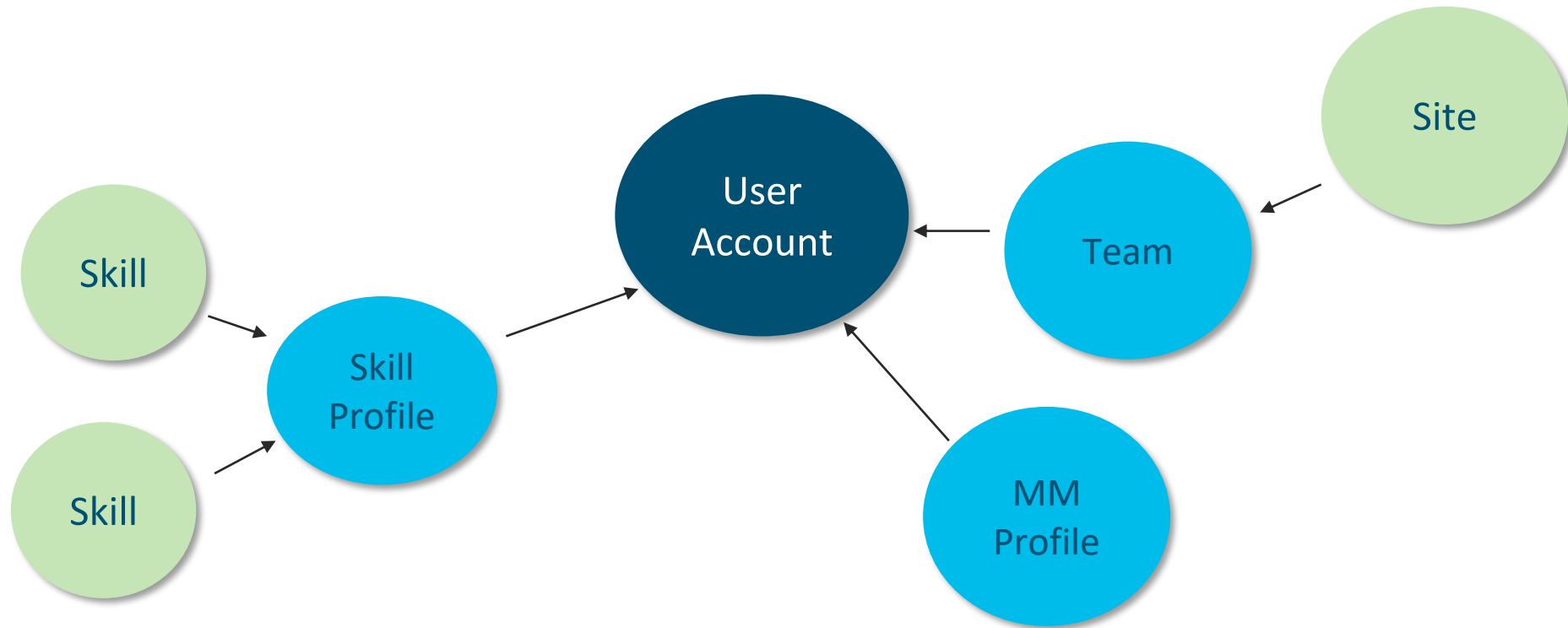
Lab 4

Provisioning Sites and Teams

- *Estimated Time: 25 minutes*

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LAB 4 Expected Outcomes
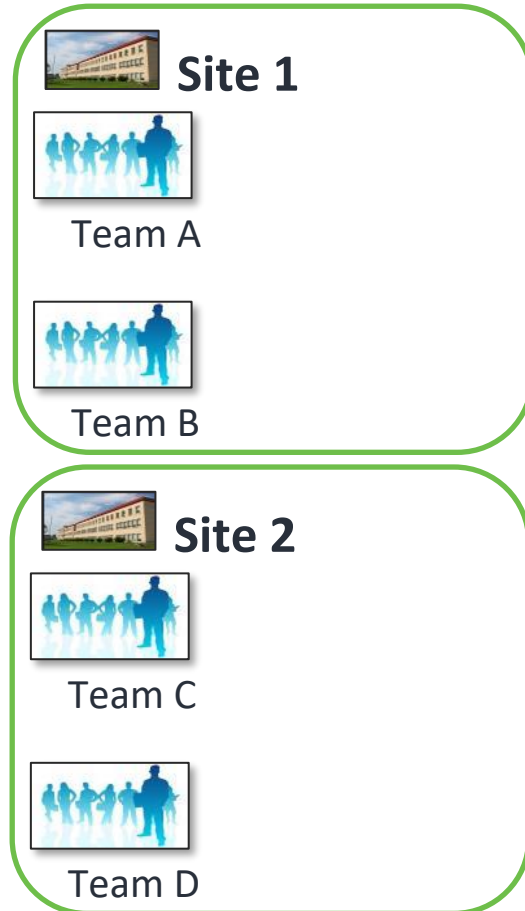
Call Handling Resources
Skill Profile
Multimedia Profile

Site 1
Team A
Team B

Site 2
Team C
Team D

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Definitions

Agent Profile	An agent profile is a group of permissions and Agent Desktop behaviors that you assign to specific **agents**. Each agent profile specifies the following permissions and settings: Queue Transfer Agent Consult and Transfer Wrap up and Idle Codes. Wrap-up Timeout Values Agent Auto Available Dialing Capabilities Dial Number Capabilities Agent Timeout Access to the agent personal statistics

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Agent Profile

General

- Specify whether you want to allow external pop-up screens.

- Only if your administrator enables the Last Agent Routing feature for your enterprise can you select whether to display the Last Agent Routing check box on the Agent Desktop during wrap-up.

  - When an agent selects this checkbox during wrap-up, the system routes the calls to them the next time the customer calls for the same issue.

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Agent Profile

Auxiliary Codes

- Specify the wrap-up codes that the agents can select when they wrap up a contact

- Specify the Idle codes that the agents can select in Agent Desktop

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Agent Profile

Collaboration

- Specify the entry points or queues that the agents can select from the Queue drop-down list on the Agent Desktop

- Specify the teams that the agents can select from the Agent drop-down list on the Agent Desktop

- Select if you want the agent to be able to select a queue in the Queue drop-down as a target for a consultation.

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Agent Profile

Dial Plan

- If you want the agent to be able to make outdial calls (With the Address Book), select Outdial Enabled.

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

- If you want the agent to be able to make ad-hoc outdial calls, enable the Dial Plan.

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Agent Profile

Agent DN Validation

- Select **Unrestricted** to allow agents to use any DN to log in to the Agent Desktop.

- **Provisioned Value** restricts the login DN to the default value that you provision for the agent.

  - **Note**: If you do not provision any DN value, the agent can enter any DN value.

- **Validation Criteria** restricts the login DN to the format specified in the Validation Criteria setting.

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Agent Profile

Agent Viewable Statistics

- Specify whether you want the agents view their personal statistics in Agent Desktop.

- Specify whether the agent can view statistics for their team.
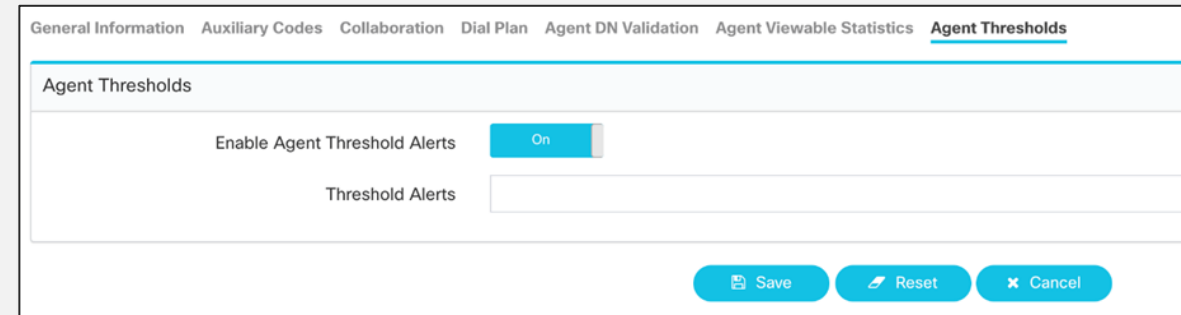
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Agent Profile

Agent Thresholds

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

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Agent Profile

Agent Timeout

- The Agent Timeout specify an Idle inactivity timeout for the Agent Desktop. The Default Value will take the configuration from the Tenant settings. Custom Value will override the tenant settings.

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Definitions

Agent Profile	An agent profile is a group of permissions and Agent Desktop behaviors that you assign to specific **agents**. Each agent profile specifies the following permissions and settings: Queue Transfer Agent Consult and Transfer Wrap up and Idle Codes. Wrap-up Timeout Values Agent Auto Available Dialing Capabilities Dial Number Capabilities Access to the agent personal statistics
Work type	Work types are values that the system uses to group idle and wrap-up codes in auxiliary reports.
Auxiliary Codes	Agents select Idle or Wrap-Up codes in Webex Contact Center Agent Desktop to indicate their unavailability or status of the customer contacts. Idle codes typically indicate why an agent is not available to take customer contacts, such as during lunch break or meeting. Wrap-up codes indicate the result of the customer contacts, for example, the agent escalated the contact, or sold any service.

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Work Type

- Select the type of Work type group Idle or Wrap Up code

Work Type

Name	
Description	

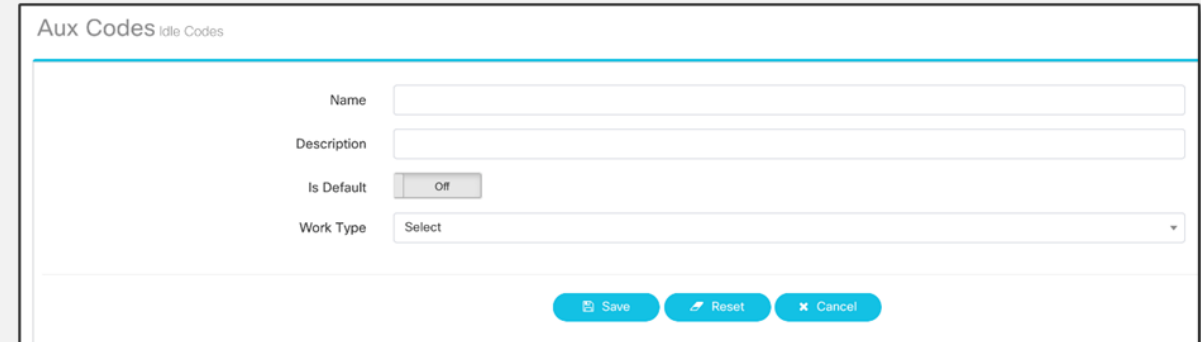Type ● Idle Code   ○ Wrap Up Code

[Save] [Reset] [Cancel]

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Auxiliary Codes

- Select Idle or Wrap Up codes to administer

- Select a Work Type for new code.

- Work types group idle and wrap-up codes in auxiliary reports.

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Definitions

User Profile	A User Profile specifies the level of access to the Tenant Portal Modules and the access rights to entry points, queues, sites, and teams. It can be used over multiple User Accounts. An Administrator assigns a User Profile to a User Account when creating the User Account.

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Default User Profiles

- There are 5 default User Profiles

  - Administrator only Profile – full access to the Tenant without Agent License

  - Administrator Profile – full access to the Tenant plus Agent capabilities

  - Supervisor – full access to the Tenant except Tenant Settings

  - Premium Agent – only access to the Agent Desktop app and MM

  - Standard Agent – only access to the Agent Desktop app

Name	Description	Profile Type
Administrator Only Profile	Profile for Administrator without Agent License	Administrator Only
Administrator Profile	Administrator profile	Administrator
Premium Agent User Profile	Premium agent user profile	Premium Agent
Standard Agent User Profile	Standard agent user profile	Standard Agent
Supervisor Profile	Supervisor Profile	Supervisor

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User Profiles

- While configuring a new user profile, you can control access for the user profile to the various Webex Contact Center modules using the **Module Settings** tab. You can also modify the settings when you edit or copy a user profile. However, you cannot change the Module Access settings when you copy an existing user profile.

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Definitions

A User Account with a license assigned, sets the default User Profile associated to it. You can then change the User Profile to any other that is created of the same type.

User Account	It is a person's account in the Tenant Portal, with contact details of that specific person.
	Example: Tenant Administrators are User Accounts

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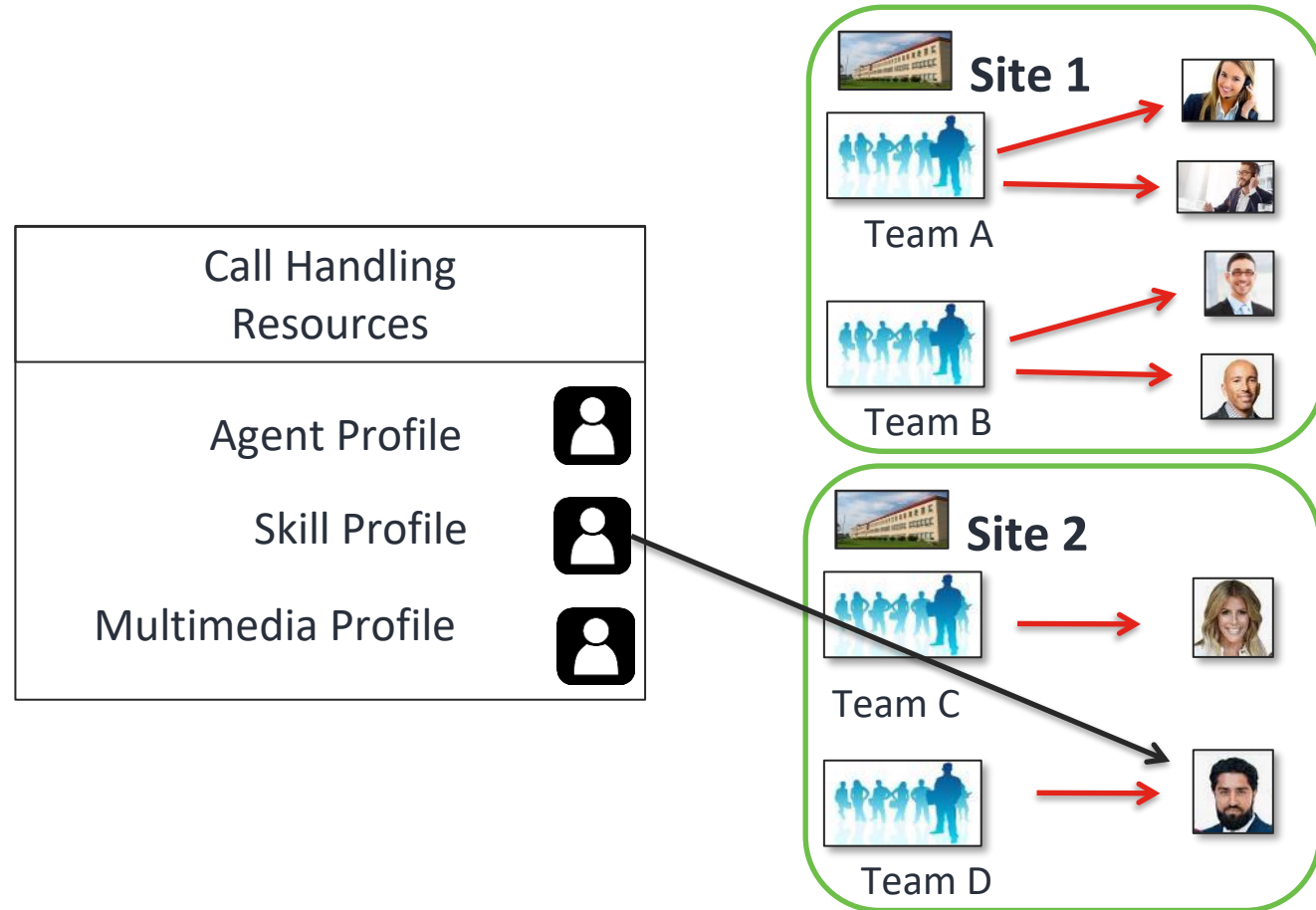# Relationship Model

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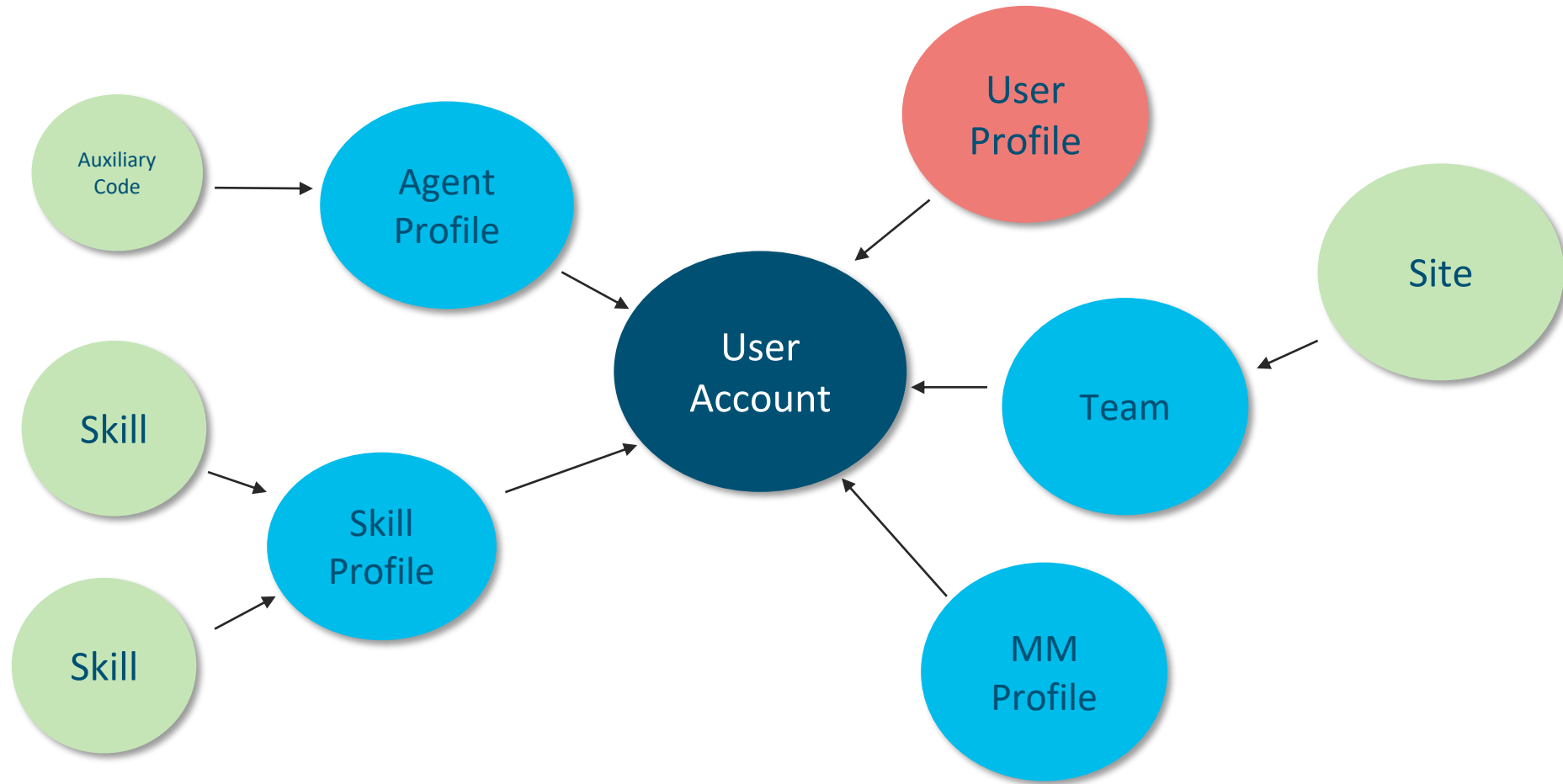
Lab 5

Configuring Agents and Creating a Supervisor.

- *Estimated Time: 40   minutes*

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LAB 5 Expected Outcomes

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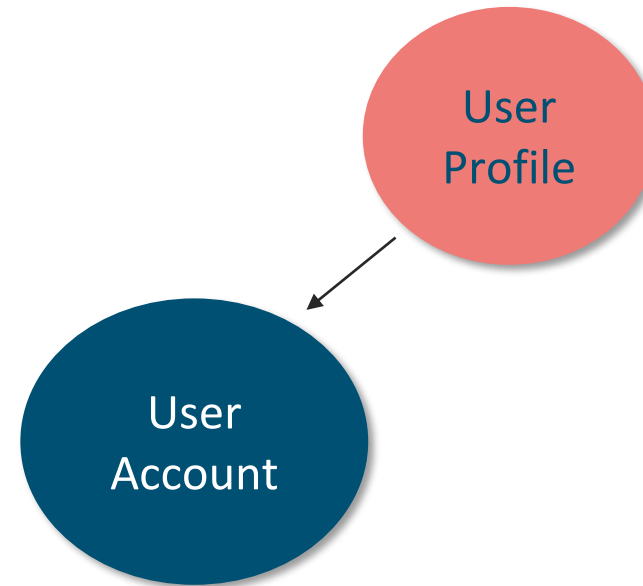# LAB 5

Agent Profiles

- Auxiliary Codes

AGENT PROFILE	WRAP-UP	IDLE
Agent-Profile-Aux-Codes	Sale (default) Support Issue	Busy Meeting (default)

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LAB 5

Agents

AGENT	SITE	TEAM	MM PROFILE
Agent 1	1	A	Omni-Channel
Agent 2	1	A	Omni-Channel
Agent 3	1	B	Omni-Channel
Agent 4	1	B	Omni-Channel
Agent 5	2	C	Omni-Channel
Agent 6	2	D	Omni-Channel

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Supervisor Relationship Model

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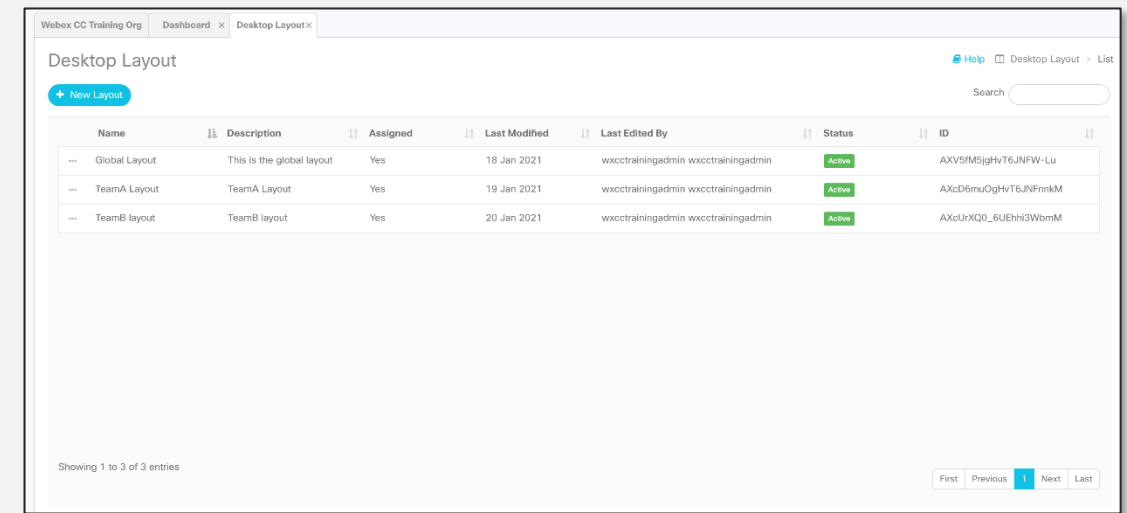
LAB 5

Expected Outcomes

PROFILE	Type	Module	Access Rights
Supervisor-Recordings	Supervisor	Recordings and Recording management	Site 1 and 2 Teams

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Desktop Layout

- There are two types of desktop layouts:

- Default Layout: A system-generated desktop layout which is available for all the teams.

- Custom Layout: The layout that the administrator creates based on the requirements of specific teams and assigns to one or more teams.

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Custom Layout

- Title and Logo

- Drag-and-drop and resize widgets

- Notification timer and maximum notification count

- Custom icons, custom tabs, custom header, custom pages, and custom widgets

- Persistent Widgets: Any custom widget can be defined to be persistent. Persistent widgets are displayed on all pages of the Agent Desktop.

- Screen Pop: The browser pops up on the Agent Desktop when an agent accepts an incoming call. The agent can view screen pop details either in a new browser tab, existing browser tab, or the Screen Pop tab of the Auxiliary Information pane based on the screen pop display and the desktop layout settings.

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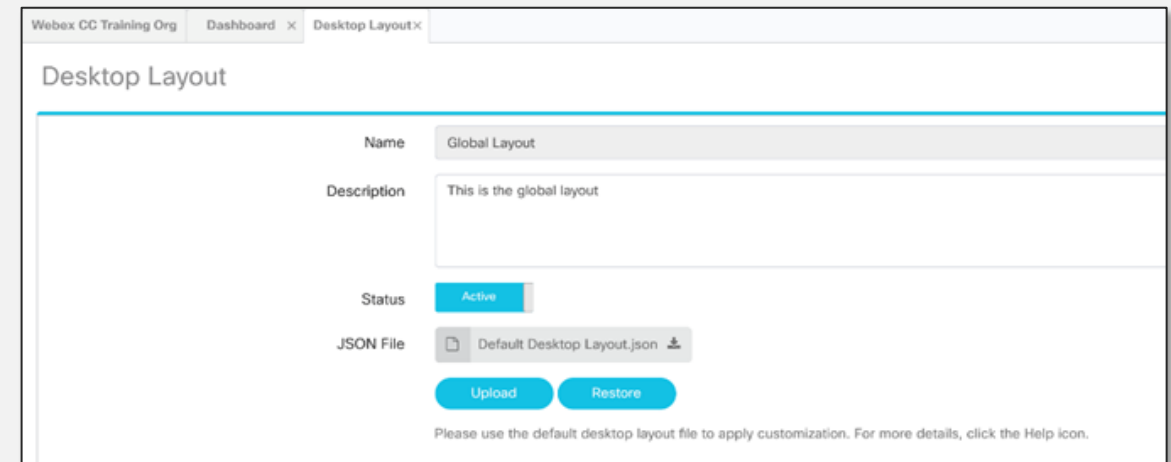
Review Questions

What is a Multimedia Profile?

It determines the media types that the agent can handle depending on the option selected:

- Blended

- Blended Real-Time

- Exclusive

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Review Questions

What is an Agent Profile?

It is a group of permissions and Agent Desktop behaviors that can be assigned to specific Agents

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Module Objectives Wrap-up

- Understanding the WXCC Tenant Structure and its Roles

- Learning the logical steps of provisioning a new Contact Center

  - Multimedia Profile

  - Sites and Teams

  - Agent Profile

  - User Profiles

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