



User Manual for Cisco Unified Contact Center Management Portal

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Corporate Headquarters

Cisco Systems, Inc.
170 West Tasman Drive
San Jose, CA 95134-1706
USA
<http://www.cisco.com>
Tel: 408 526-4000
800 553-NETS (6387)
Fax: 408 526-4100



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Preface

Purpose

This document explains how to use the Unified Contact Center Management Portal (Unified CCMP) to view and alter your system.

Audience

This document is intended for all users of Unified CCMP, from high-level administrators to team supervisors. The reader needs no technical understanding beyond a basic knowledge of how to use computers.

Organization

Chapter 1, "Welcome"

Provides basic information on the Unified CCMP environment and how to use the context-sensitive online help.

Chapter 2, "Settings"

Describes how a user can change their settings, or the settings of others, such as email address, timezone, or security privileges.

Chapter 3, "Information Notices"

Explains how to view and edit information notices.

Chapter 4, "Reports"

Describes how to set up and view audit reports.

Chapter 5, "System Management"

Describes the folder structure of Unified CCMP and explains how to set up and maintain agents, contacts, equipment, and other resources using Unified CCMP.

Chapter 6, "Security Management"

Explains how to set up security settings for individual users by means of roles and tasks, and how users with the same permissions can be added to groups to simplify management.

Chapter 7, "Service Management"

Explains how supervisor users can use Unified CCMP for management of agents, teams, and skill groups.

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Welcome

About the Unified Contact Center Management Portal

Overview

Unified CCMP is a browser-based management application designed for use by contact center/system administrators, business users, and supervisors. It is a dense, multi-tenanted provisioning platform that overlays the contact center equipment. The contact center equipment is viewed as consisting of configuration items, generally known as resources, such as agents or skill groups, and events logged when the resources are used by the equipment, such as call record statistics.

Unified CCMP partitions the resources in the equipment using a familiar folder paradigm, and these folders are then secured using a sophisticated security structure that allows administrators to specify which users can perform which actions within the specified folder(s). Unified CCMP supplies a number of tools that operate on the configuration and statistics data. The tools are all inherently multi-tenanted and those supported currently are:

- The Information Notices tool that implements the "Message of the Day" functionality.
- The Security Management tool that implements the user and group task/role based security strategies.
- The System Management tool that implements the resource partitioning strategies and provisioning operations.

Unified CCMP's focus on supplying dense, multi-tenancy functionality plays to the business plans of hosts and large enterprises as it allows the distributed or disparate contact center equipment to be partitioned or segmented to satisfy the following business goals:

- Unified CCMP abstracts and virtualizes the underlying contact center equipment, thereby allowing centralized deployment and decentralized control, which in turn gives economies of scale while supporting multi-level user command and control.
- Unified CCMP allows the powerful and flexible native Unified CCE/Unified CCH provisioning operations to be abstracted into simple, high level tasks that enable business users to rapidly add and maintain contact center services across the virtualized enterprise (or portion thereof).
- A Portal user sees only the resources in the platform that he/she is entitled to see, thereby giving true multi-tenancy.
- A Portal user can manipulate only those resources visible to them by using Unified CCMP tools and features he/she has been authorized to use, thereby giving role-based task control.

How does it work?

Unified CCMP maintains a complete data model of the contact center equipment to which it is connected, which is periodically synchronized with the equipment. Unified CCMP data model and synchronization activity allow for items to be provisioned either through Unified CCMP's Web interfaces or from the standard equipment specific user interfaces.

Getting Started

Overview

A useful view of the Web Portal is to consider that there are typically a small number of classes of user:

- The **host administrator** who is responsible for the whole platform and therefore has a view across all the equipment, tenants and their resources.
- The **tenant administrator** who is responsible for the slice of the system assigned to that tenant by the host administrator.
- The **tenant user** who has access just to the resources and tools assigned by the tenant administrator. Several sub-classes of tenant user can be created by the tenant administrator using user groups and roles to achieve business requirements, for example one class of users might be able to add information notices.

On a new system, the host and tenant administrators perform their respective tasks before the tenant user is given access to the system. These tasks are detailed below.

Host Administrator First Steps

The Host administrator is responsible for:

- Ensuring that the tenant equipment (peripherals) are correctly located in the tenant or Shared folders.
- Creating an administrator user for each tenant.
- Adding them to the tenant administrators group and assigning any specific roles.

Tenant Administrator First Steps

The tenant administrator is responsible for:

- Creating a resource folder structure that maps onto the tenant's business.
- Moving the tenant's resources into the relevant subfolders.
- Creating security groups that provide the required role based access to the subfolders.
- Creating the required number of users and assigning them to the security group(s) relevant to the role of the user.

Tenant User First Steps

The tenant user (usually just called the user) created by the tenant administrator may now log in to the system. Select the appropriate tool from your home page:

- To view or manage information notices, select the Information Management tool.
- To manage users/security groups, select the Security Management tool.
- To manage resources (dimensions), select the System Management tool.
- To view or manage audit reports, select the Reporting tool.
- To perform re-skilling or agent team changes, go to the Service Manager tool.

Open the Online Help

For security purposes, the online help is available only after the user is logged in. To open the online help, click the Help link in the top right corner of the screen. The help provides:

- Instructions for using, provisioning and managing the system.
- A comprehensive glossary.
- Logical indexing to help you quickly find the topics you need.
- Search facilities.

The help dialog consists of a main panel in which the topic text is displayed.

To the left of the main panel are four tabs. Click the tab header to display the tab contents. The tabs are as follows:

- Contents** displays the topic list as a table of contents, to help you locate the topic you require.
- Index** lists the keywords that you can use to find related topics.
- Search** enables you to search through all the topics for a particular word or phrase. Enter the text in the field provided and click Go. A list of all the topics in which the text occurs are then listed. You can also use the search field displayed in the top right of the dialog window.
- Glossary** comprehensively covers and explains the terms and entities comprising Unified CCMP.

Log in and log out

Logging in

To log in to the system:

1. Open your web browser and enter the URL address of the web server in the browser's address field.

This will be in the format: `http://<Portal server>/portal`

Or for SSL deployments: `https://<Portal server>/portal`

For example, one possible web server address might be: `https://webserver1/portal`

2. The security access banner is displayed to inform the user that access to the platform is restricted to authorized users.

Note This banner can be changed by the administrator for the whole platform to meet the needs of the specific deployment. (For further information see the Change Your System Settings topic.)

Note If your system has been set up to use Single Sign On (SSO), you will see no login page. See the Single Sign On section for more details.

3. Press **agree** to display the Login page.
4. Enter your User Name and Password details in the fields, then click Login. A **successful login opens** the user's home page.

Note Before the first time the system is used, the **User Name** for the host administrator is automatically set to *administrator*, with a blank password. A new password should be set immediately.

Note If you do not perform any action on the system for twenty minutes, the system automatically logs you out.

If the web page is already open, click Logout to log out the previous user and display the normal login window.

First Time Users

- The first time you access the Web Tool you might be prompted to accept a security certificate. Accept this security certificate and then proceed.
- After you have first logged in, you might have to change your password. If prompted to change your password, do so immediately, otherwise further access will be denied. For further information see the Change Password topic.

Note: The password field is case sensitive. If you have difficulty logging in, make sure that you have not accidentally pressed the caps lock key.

For tips on how to create a secure password that you can remember, see the Change Your Password section.

By default, you have a maximum of three attempts to log in to the system correctly. If, after three attempts, you still have not logged in correctly, your user account will be locked out. If this is the case, contact the administrator responsible for re-enabling it.

The system automatically logs out a user when the web browser window is closed.

Logging out

Once your user session is finished, close your browser session to ensure that no other user can interfere with your account.

To log out of the tool, click the **Logout** button located on the top right side of your browser window. Alternatively, close the web browser window to log out automatically.

Single Sign On

The administrator might have set up Unified CCMP such that it recognizes the Windows users who are able to access it. In this case, as long as you are logged in to Windows as yourself, you should not need to log in to Unified CCMP at all.

The first time you access Unified CCMP using Single Sign On (SSO), a dialog box might pop up, requesting your Windows username and password. To sign in automatically in future, you need to add Unified CCMP website to your browser's list of local intranet sites.

To do this in Internet Explorer:

1. Click **Tools > Internet Options** and click the **Security** tab.
2. Select the **Local intranet** icon and click **Sites**.
3. Click the **Advanced** button to add the Unified CCMP site to IE's list of local intranet sites.
4. Enter the URL of Unified CCMP website and click **Add**.
5. Click **Save** on each pop-up until you are returned to the browser window.

Home Page

Your Home Page

Once you have logged in, you are presented with your personalized home page, which is the launch pad for accessing the rest of the system.

For a basic mode user, the main central panel displays your most frequently used reports, which are organized into related report groups. For further information, see the basic mode options section below.

For an advanced mode user, the main central panel displays the system management functions that you can access. For further information, see the advanced mode options section below.

The **Toolbar** at the top right of the screen displays further functions, which vary depending upon the system functions you are using and the permissions granted to you.

The very top of the page displays a list of the pages you have navigated through to access your current page. This is called the breadcrumb trail. Each page in the trail is displayed as a link to help you quickly return to previous pages.

To the right of the breadcrumb trail are following options:

- Home** Click to return to your homepage.
- Help** Click to display the online help. It contains everything you need to understand and use the system features, reports and report analysis. See the Online Help topic.
- Settings** Click to select the settings you need to change. See the Manage Settings topic.
- Logout** Click to end your session. See the Logging in and logging out topic.

If any of these terms are unfamiliar to you, please look them up in the **Glossary**.

Modes

There are two modes in which Unified CCMP can be used.

- Basic users** need to view reports and define their own user settings, but do not require system management functions.
- Advanced users** can navigate the folder tree. Advanced users manage the system and the resources it contains, system reports and analyses, as well as defining the users who can access the system and their user rights.

Basic mode options

On logging in, if you are a basic user (or if you are an advanced user using *basic mode*) you see a flat list of the reports you have access to or, if you do not have access to reports, your team management page. You can always return to this page by clicking **Home** at the top right of the screen.

In the bar above the list of reports are a number of menu options:

- Delete** - deletes selected reports.
- Run** - runs selected reports.

Next to the **Home** link in the header, a shortcut menu displays the following links:

- Agent Team Manager - allows you to manage your agent teams.
- Skill Group Manager - allows you to manage your skill groups.
- Users – allows you to manage the users in your folder.
- Self-Skilling – allows you to manage the skills to which your associated agent is assigned.

Note Some of the above mentioned links are only available if the appropriate permissions and memberships exist.

Advanced mode options

Advanced users require access to system management functions. To access these functions, you must be in *advanced mode*.

To switch between basic mode and advanced mode, click on **Settings > User Settings**. Check the **Advanced Mode** checkbox in the middle of the user settings to view the functions you have access to. This is the **Tools** page.

You can set a commonly-used tool to be your homepage using the Settings page.

Which tools you can use depends on your security permissions, as determined by the *global* and *folder roles* that have been assigned to you.

Shortcuts to all of the tools available to you are in the menu located next to the **Tools** link in the header.

Note If you think you should have access to some of these tools but cannot see them in the **Tools** page, contact your system administrator.

- The Reports section enables you to view and manage audit reports, which provide information about changes made to the system.
- The Security Manager section enables you to create and manage users and groups, their roles, which define the tasks they may perform and manage security; the customer data and system functions they may access.
- The System Manager section enables you to provision and manage the entire system, the reports and the resources they report on.
- The Information Notices section enables you to create and manage online notices; a messaging feature which informs and updates system users with important information.
- The **Service Manager** section enables a user with the appropriate agent mapping to manage skill groups and agent teams for either themselves or for other members of a team that they are supervising.

Further advanced functions include:

- **Settings** This section covers the creation and administration of system, display, user and password settings. See the Manage Settings topic.

Change Your Password

To display the Settings page, click **Settings**. Click **Change Password**. The Change your password settings page will be displayed.

You will need to change your password if:

- You have logged into the Web Portal for the first time.
- The system has been configured to request you to change it after a specific length of time.
- Your password has become known to others.

To change your password:

1. Enter your Old Password.
2. Enter your (New) Password.
3. Re-enter your new password in the Confirm Password field.
4. Click **OK**.

Note

- Your password must normally consist of at least 3 characters. There may also be other requirements, commonly that it must include lower case letters, upper case letters and numbers. Contact your system administrator for more details.
- Your previous passwords are stored in memory, therefore you cannot reuse passwords.

Tip You can create a password that is both memorable and secure by choosing a memorable phrase such as a proverb or a line of your favorite poem, selecting the first letters of each word in that phrase, and turning some of those letters into numbers. For example, the proverb 'a chain is no stronger than its weakest link' shortens to 'acinstiwl', which can be turned into a password 'AC1nst1WL' which is easy to remember but difficult for a hacker to crack.

Web Tool Commands and Browser Interaction

Supported Browsers

This Web Tool is designed for use with Internet Explorer 6 (SP2) or later.

If you are working on a computer running Windows 2000, you will need to use Internet Explorer (IE) 7.

Using Popup Blockers

This Web Tool may be adversely affected by browser or third-party popup blocking utilities. When using this tool, either disable popup blocking or exclude this tool's domain from popup blocking.

To disable popup blocking (in other words, to enable popups) in Internet Explorer (IE):

1. Click on **Tools** and select **Internet Options**.
2. Select the **Privacy** tab.
3. At the bottom of the window, click on the **Block pop-ups** box to remove the checkmark. If the box is already empty, leave it as it is.
4. Click **OK**.

Alternatively, you can enable popups for the Web Tool only. To do this using IE, use the Web Tool normally until a message is displayed at the top of the browser window telling you a popup has been blocked. By clicking on this you may choose to permanently allow popups from the Web Tool, while still remaining protected against popups from other sites.

Different browsers have different methods of disabling popup blocking.

Settings

Manage Settings

To display the Settings page, click the **Settings** link at the top right of the page.

The settings that you can customize are as follows:

- User Settings** Enable you to change your time-zone, name and description. Advanced users may also change their homepage settings.
- Password Settings** Enable you to change your password.
- System Settings** Enable users with host administrator privileges to set system options such as the login message.
- Security Settings** Enable users with host administrator privileges to set system security options such as password requirements or the default security groups created in each policy root.
- Provisioning Settings** Enable users with host administrator privileges to set resource management options such as whether agent states can be traced.
- About** enables you to see the version of Unified CCMP that is being used.

Change Your User Settings

Basic Options

To display the Settings page, click the **Settings** link. Then click **User Settings**. The Update settings for this user page will be displayed.

To change your user settings, select or overwrite the required fields and click **OK**. These fields are explained below.

- Time-zone** Select your local region from the drop down list
- Culture** Select the culture from the drop down list of available cultures. This changes date/time formats in the application and localizes the user interface for cultures with a supporting language pack.
- First Name** and **Last Name** Change your name. You may want to do this if you have married, or if you normally use a name other than the **First Name** entered here (such as a middle name).
- Email** Enter the email address you want Unified CCMP to send your emails to, if any.
- Description** Enter a suitable description of yourself (such as job title or departmental role).
- Data Paging Size** This field dictates the number of selected items to be displayed per page, for example in the central Items panel of the System Manager. Numbers above 20 are not recommended.

- Text Only Mode** Check this box to set your display to a simplified text-only view. You must log out and log back in for your display to change.

Advanced Options

If you have sufficient security credentials, you can access further functions. Select or overwrite the required fields and click **OK**. These fields are explained below:

- Advanced Mode** This checkbox changes your homepage view from a set of reports (this view is the only view possible for basic users) to the homepage specified by the **Default Homepage** field below. By default, this will be a view of the tools you have access to.
- Show Deleted Resources** Check this checkbox to view all deleted items you have permission to see, or uncheck it to view only active and pending items.
- Default Tool** Allows you to change your homepage. Select a tool from the drop-down menu to display that tool as your homepage when you are in Advanced Mode. To see all your tools in your homepage, select the **Tools View**.
- Tools Layout** Allows you to change the format of the Tools Page. You may choose between a list of tools or a table.

Click **OK** to save your settings.

Change the System Settings

Typically, only a user with sufficient permissions has the right to access and manage system settings. System settings mostly enable a user to define user password requirements.

To display the Settings page, click the **Settings** link. Then click **System Settings**.

To edit the system settings:

1. Display the **System Settings** page as described above
2. Change any or all of the following:

The Product Name field displays the name of the application.

The Login Message field contains the message displayed to a user when the user logs into the system. By default a WYSIWYG editor is used, but by clicking on the <> button you can choose to work in plain text or insert your own HTML tags instead.

Note The login message should not exceed 250 characters in the default 8pt font.

Note To use the WYSIWYG editor to format the login message, you must highlight the text to be formatted and use the appropriate editor function. The editor functions do not allow you to format the text as you type, that is, clicking the *I* button (for example) will not 'switch on' italics mode for the text typed afterwards.

The Message Agreement Link field contains the text shown on the button that the user must click to proceed from the login message set above to the login page. This text should be no longer than 40 characters

Customize the Top Menu

To add your own links to the top menu (the options displayed at the top right of every page):

1. Click the **Customize Top Menu** option in the toolbar to open the **Customize Top Menu** page.
2. In the **Create a new menu item** section:
 - Name** Enter the text to be shown in the top menu.
 - Link** Enter the URL to link to. You can check that this is valid by clicking on the icon to the right.
3. Click **Add**.
 - Note** Changes to the top menu are system-wide and will be applied to all tenants.

To edit existing custom links:

1. Click the **Customize Top Menu** option in the toolbar to open the **Customize Top Menu** page.
2. In the **Existing editable menu items** section at the bottom are listed all custom links.
3. Mouse over each to bring up the edit and delete icon.
4. Click the edit (pen and paper) icon.
5. Change the link details as desired.
6. Click the check icon to save your changes, or the cross icon to exit editing without saving.

To delete existing custom links:

1. Click **Customize Top Menu** in the toolbar to open the **Customize Top Menu** page.
2. In the **Existing editable menu items** section at the bottom are listed all custom links.
3. Mouse over each to bring up the edit and delete icons.
4. Click the delete (red cross) icon and confirm.
5. Click **Back** to return to the **System Settings** page. This removes the custom link.

View the Application Log

To view information regarding system events which have occurred in the Management Portal:

1. Click the **View application log** option in the toolbar. The information is displayed in a table, which has 4 columns:

Event displays information regarding the event.

Date Time displays the date and the time when the event occurred.

Source displays the data source the system was connected to when the event occurred.

Message displays any pertinent information relating to the event.

2. When you have finished viewing the log, click **Back** to return to the System Settings page

Change the Security Settings

Typically, only a user with host administrator permissions has the right to access and manage security settings. Security settings cover all aspects of system security, from password restrictions to security groups.

To change the system's security settings, click the **Settings** link. Then click **Security Settings**.

Edit Security Settings

- If the **New Folder Inheritance Default** field is checked then, when creating new folders, the Inherit Permissions field is checked by default.
- The Password Format field contains the required format for the password entered by a user. The options are:
 - Custom** This is for users with high privileges only. It requires regular expressions and a knowledge of system configuration.
 - Low** Any string.
 - Medium** Any string between the minimum and maximum password length.
 - Medium/High** Any string between the minimum and maximum password length, which must contain lowercase, uppercase and numeric values.
 - High** Any string between the minimum and maximum password length, which must contain lowercase, uppercase, numeric values and any of the following characters: @ # \$ % ^ & + = !
- The **Minimum Password Length** field indicates the minimum number of characters the system will accept as valid for a password.
- The **Maximum Password Length** field indicates the maximum number of characters the system will accept as valid for a password.
- The **Minimum Password Age** field shows how long a user must wait between changing passwords.
- The **Password Expiry (days)** field displays the length of time the system will accept a password before the user is requested to change it.
- The **Number of previous passwords to check** field displays the number of previous passwords the system accepted for a specific user.

If any one of these previous passwords is used, the user will be denied further access to the system.

- The **Login attempts before logout** field indicates the number of times a user can enter the wrong password before being locked out of the system.
- The **User Folder Default Role** specifies the permissions that a new user is given on the folder that is created when the **Create a new folder for this user** option is checked during user creation. Note that you will still need to give the user the correct global roles to actually use these permissions.
- Optionally, the **User Folder Suffix** field allows you to choose a suffix which, when added to a user's name, becomes the name of the personal folder created when the **Create a new folder for this user** option is checked during user creation. This is disabled when using single sign on.
- The **Groups to create when removing inheritance section** allows you to change the groups that are automatically created when a folder becomes a policy root, and the permissions that they are assigned within that folder and its child folders. You may choose to uncheck all the groups, in which case no groups will be created automatically, or to assign them custom roles. See the Security Manager section for more information on policy roots.

Note It is not currently possible to change the global roles that groups are assigned by default. The Basic User and Supervisor User groups will therefore always have the permissions of the Basic global role, and the Advanced User group will have the permissions of the Advanced global role.

Click **OK** to save your settings.

Change the Provisioning Settings

Typically, only a user with host administrator permissions has the right to access and manage provisioning settings.

To change your resource management settings, click the **Settings** link. Then click **Provisioning Settings**.

Edit Provisioning Settings

Agent State Trace Enabled Allows agent states, such as Available or Wrap, to be tracked by the system. An individual agent's state will only be traced if the State Trace option is checked for that agent.

About Settings

To display the Settings page, click the Settings link. Then click **About**.

The about this installation page describes the version of Portal that you have installed on your system.

Information Notices

Manage Information Notices

Overview

Information notices (also sometimes called system notices) are similar to a notice board or Message of the Day feature. Information notices are a useful way to inform all contact center staff of general information in one action and in one location, rather than having to inform each staff member individually. Notices typically include changes to agent assignments or important customer information. Once you have logged in, any information notices that apply to you are displayed in your homepage in a scrolling window at the top right corner of the screen.

Basic Mode options

To view an information notice:

3. Click your mouse pointer over the information notices icon located at the bottom right hand side of the basic mode home page. A list of information notices will be displayed.
4. Click the name of the required notice from the list. The notice text will be displayed in full.
5. Once you have finished reading the notice, click **Cancel**.

Note

- The information notices panel will only display current or valid notices. Notices that are out of date or pending are not displayed.
- If you have sufficient user privileges, you can edit the notice. Click the **Edit this Notice...** link. Further information can be found in the Advanced Mode options section below.

Advanced Mode options

To open the Information Notices tool as your homepage:

1. Click the **Settings** link.
2. In the Settings page, select **User Settings**.
3. Select **Information Notices** from the Default Homepage drop-down list.
4. Click **OK**.
5. Click **Home**. The All System Notices page will be displayed.

Alternatively, you may access the Information Notices section by clicking **Tools**. The Tools page will be displayed. Click the Information Notices header. The All System Notices page will be displayed.

Note The **Tools** page can only be accessed by users who have been granted Advanced Mode status. See the User Settings topic.

To create an information notice:

1. Click **New**. The New System Notice page will be displayed

The screenshot shows the 'New System Notice' page in the Cisco Unified Contact Center Management Portal. The page title is 'Create a new system notice in '/Root''. The left sidebar contains a tree view of folders: Root, Aarque, ABC Comms, Acme, Acorn, Anacomp, Archibus, Bajor Meter, BBC, Bernados, Birse Group, Shared, and Unallocated. The main content area has a 'Subject' field, a rich text editor with a toolbar (font, size, bold, italic, underline, link, unlink, list, ul, indent, outdent, undo, redo, print, close), 'Valid From' and 'Valid To' date pickers, and 'Save' and 'Create Another' buttons.

2. Select the folder in the tree, whose users are the target audience for the new notice. The folder name will be displayed at the top of the page. Then perform the following:
 - In the **Subject** field, enter a title for the notice
 - In the **Content** field, enter the text. You can format the text as required by using the editor functions displayed above the text field. Functions include: text formatting, justification, bullet points and numbering, indenting, web linking and table add-ins. Click the <> icon to remove the editor functions or display them if they have been removed from the view.
 - In the **Valid From** and **Valid To** fields, enter start and end dates to define the lifetime of the notice, by clicking on the calendar icons and selecting the appropriate months and days.
 - Select the **Create Another** checkbox if you wish to add another notice after the creation of the current notice.
3. Click OK

Alternatively, click **Tools**. The Tools page will be displayed. Click Create a Notice. The New System Notice page will be displayed, and you may proceed as per the bulleted list above.

To edit an information notice

1. Click the name of the notice to be modified beneath the Information Notices header. The notice will be displayed.
2. Click **Edit**. The Edit Information Notices page will be displayed.

3. Make the required modifications to the notice in the fields provided, as explained for creating an information notice above.

You may also edit an information notice by clicking **Tools**. The Tools page will be displayed. Select the notice to be edited from the **Edit a Notice** drop down list and click **Edit**. The Edit Information Notices page will be displayed.

Note To format the information notice, you must highlight the text to be formatted and use the appropriate editor function. The editor functions do not allow you to format the text as you type, that is, clicking the *I* button (for example) will not 'switch on' italics mode for the text typed afterwards.

To delete an information notice, click the red cross displayed next to the name of the notice to be deleted.

Alternatively, click the name of the notice where it is displayed beneath the Information Notices header. The notice will be displayed. Click **Delete**.

To move an information notice

1. Click **Tools**. The Tools page will be displayed.
2. Click the **System Manager** header. The System Manager page will be displayed.
3. Select the folder in the tree whose users or groups are the audience for the intended notice.
4. In the Items drop down list select **Information Notices**. All the information notices for the selected folder will be displayed.
5. Select the checkbox of the notice to be moved and click **Move**. The folder tree will be displayed.
6. Select the folder to move the notice to and click **OK**.

Audit Reports

Understanding Reports

A report is a 'snapshot' or overview of contact center operations; the customers, their resources and the agents (and agent groups) who provide them with customer service. Reports enable users to understand what is happening in the contact center; they provide information for auditing purposes.

A report is a combination of three factors:

- Report Data
- Report Template
- Report Parameters

Report Data consists of **resources** (such as Dialed Numbers) and the **agents** who provide Customer Service. These entities are stored in a hierarchical folder structure or Report Tree.

Report Template determines the exact ways in which the report can display data, and the data that it displays. Four audit report templates are included with Unified CCMP. These are:

- **Audit Data Report** This report shows every change to a resource that has occurred within the system during the specified time period. This includes the name of the resource, the name of the user who made the edit, and whether the change was successful.
- **Daily Audit Summary** This summarizes the changes made to resources during the day, showing the percentage and total of successful and failed changes at different times for individual items.
- **Weekly Audit Summary** This summarizes the changes made to resources during the last week, showing the percentage and total of successful and failed changes on different days for individual items.
- **Monthly Audit Summary** This summarizes the changes made to resources during the last month, showing the percentage and total of successful and failed changes on different days for individual items.

Report Parameters provide the means of controlling the type and amount of information you wish to see in your report, as well as determining how the report is displayed. Not all reports have the same parameters. However some common parameters are as follows:

- **Sort Column** This is used to arrange the report columns so that you can focus on the column data which is of interest to you.
- **From Date and To Date** The start and end dates of the time period covered by the report.
- **Rows per page** The maximum number of report table rows displayed per page.

View a Report

A report is displayed as a table; column headers display the name of the resources whose data is used in the report, for example agent or dialed number, and the rows display the data values for each column header.

Once you have logged in, all of the reports which you can view are displayed.

To open a report:

1. Select a report from the report group list(s) in your homepage by clicking the underlined report name. The View Report page will be displayed.

Alternatively, you may open the report in one of the following formats, by clicking the associated icon:

PDF Click this icon to display the report in an Adobe Portable Document Format

Excel Click this icon to display the report in an Excel spreadsheet

Enhanced HTML Renderer Click this icon to display the report in HTML format

2. Before the report can be displayed, select the parameters that apply to the selected report. These help you control how the report is displayed, the report format, and how to search through the report data. Options include the following:

Parameter Set The parameter set to view the audit report for. Some audit reports require parameter sets based on certain resource types. In these cases the resource type (such as Tenant) will be shown instead. The default <new> must be changed to a parameter set before you can run the report.

Show only exceptions If you check the **Yes** radio button, only items outside the report's exception thresholds will be shown, and it will be necessary to set exception thresholds to see any data at all.

Header Text Set a subtitle to be displayed under the main report title. This should explain the purpose of the report, for example 'Successful provisioning operations'.

Date/Time From/To The time periods that this report shows data for. You can choose to either set specific dates (**Absolute**) or set the date to Yesterday, Last Week and so on (**Relative**)

Sort On Select what field the report is to be ordered by. This should be the aspect of the report that interests you most. For example, if you are most interested in which provisioning operations have failed, you should sort the report by Event Outcome, which will group the data into Success and Failure within each resource type.

Sort Order Whether the field you chose to sort on is to be displayed in alphabetical (**Ascending**) or reverse alphabetical (**Descending**) order.

The following options are available from the toolbar:

Edit Enables you to modify the report details (not the report contents). For further information see the Edit a Report topic.

Save Saves the changes you have made to the report's parameters.

Create Link Click to display the Enter details of the report to be saved page. Then perform the following:

In the **Name** field enter a unique name for the new report.

In the **Question** field enter a question which reflects the report contents, such as 'How many provisioning operations have failed?'

Note *Linking* means that the new report version is automatically linked back to the original report in the system.

Delete Removes the report from the system.

Thresholds Allows you to set thresholds for the report.

Caution A report saved under a different name shares the same references as the original and is therefore linked together in the system. Deleting a report may result in all linked reports being deleted.

3. Click **View Report**. The following options become available:

If the report is too large to display on one page, it will be displayed across multiple pages. You can enter the number of the required page in the page number field or use the forward and backward navigation buttons to locate the page you need.

The displayed report can be resized on the screen. Select the report size from the drop down list. 100% indicates that the report is displayed at the size it would be if printed.

The Search field is used to look for specific items within the report. Enter the name or value you are looking for and click the Find button. You will be taken to the first occurrence of the data you are looking for. If the item occurs more than once, click the Next button to be taken to the next occurrence.

Select the format you wish to view the report in from the drop down list. The following options are available:

Extensible Markup Language (XML) The report is displayed as pure XML script. This is useful if the report data is to be imported into a different system and can also be used with later versions of Microsoft Office to create Excel spreadsheets or Access databases.

Comma Separated Variable (CSV) The report is displayed in a spreadsheet, with all data values separated by a comma.

Acrobat Portable Document Format (PDF) This format enables you to distribute and print the report on any machine, provided the Adobe Acrobat reader software is installed.

Excel The report is displayed in a Microsoft Excel spreadsheet, which is useful if you wish to manipulate the report values at a later date.

Click **export** to view the report in the selected format.

Click **Refresh** to update the data displayed in the report.

On the upper right of the **Report Parameters** panel, there is a double arrow icon. Click this to hide the parameters section of the page. This is useful if you have a large report and need the full screen to display it.

You may also open the report by clicking Tools > View Reports, selecting the folder in the tree which contains the report to be viewed, and selecting the correct report from the list.

Note The Tools page can only be accessed by users who have been granted Advanced Mode status. See the User Settings topic.

Manage Reports

Manage Reports

Report management involves moving reports within the Web Portal folder tree. Reports can be moved individually or in bulk. System users with sufficient security privileges can also edit multiple reports in one operation.

To display the Reports section:

1. Click the name of the report in your homepage. The View Report page will be displayed.
2. Select the folder in the tree which contains the required report. A list of reports will be displayed for the selected customer/folder.
3. Select the required report. The View Reports page will be displayed.
4. Select the required parameters.
5. Click View Report. The report will be displayed.

Alternatively, click Tools. The Tools page will be displayed. Click View Reports. The View Reports page will be displayed. Then proceed as above.

Note The Tools page can only be accessed by users who have been granted Advanced Mode status. See the User Settings topic.

To save a report, click **Save**.

To save a report into a specified location:

1. Click **Create Link**. The Create Link Report page will be displayed
2. Select a folder location for the new report to be saved in. Then perform the following:

In the **Name** field enter a name for the new report (parameter set).

In the **Sub Title** field enter a simple question which reflects the report contents and which is used as the displayed title for the report. For example, 'How many calls are queued?'

3. Click **OK**.

To move a report:

1. Click **Edit**. The Edit Report Details page will be displayed.
2. Click **Move**. The folder tree will be displayed in a new section.
3. Select the folder to move the report to and click **OK**.

To delete a report, click **Delete** or click the red cross displayed alongside the report name in your homepage.

To print a report, click the print icon. The Printer dialog will be displayed. Select the print parameters and click **OK**.

Manage Parameter Sets

Parameter sets determine what data is displayed. For example, a report parameter that is a single tenant will produce a report that displays only data associated with that tenant.

To display the report's parameter sets:

1. Click **Parameter Sets**. The Parameter Sets page will be displayed.
2. Select a folder. All the parameter sets for the selected folder will be displayed. The following options are available in the toolbar:

New

Delete

Move

To create a new parameter set:

1. Click **Parameter Sets**. The Parameter Sets page will be displayed.
2. Select a folder. All the parameter sets for the selected folder will be displayed.
3. Click on **New** to display the Create a new parameter set page.
4. Select the item type to view from the Item type drop down list.
5. Click **Create Parameter Set**.
6. From the **Folders** tab, select the folder containing the resources, and choose whether you will be adding items in subfolders as well.
7. From the **Resources** tab, select the resources. You may choose to see resources only from the folder you have selected, or from its sub folders also.
8. Click **Add** to add the specified resources to the parameter set
9. You may also remove resources from the parameter set by checking them and clicking **Remove**.
10. Select the **Save As** option.

11. In the Name field enter a name for the new report (parameter set).
12. Click **OK**.

Note If a report is specified as using a particular type of parameter, such as tenant, you will not be able to use parameter sets that use different resource types, like Agent or Agent Team, with that report.

To modify the properties of a parameter set:

1. Click **Parameter Sets**. The Parameter Sets page will be displayed.
2. Select a folder. All the parameter sets for the selected folder will be displayed.
3. Click the properties icon displayed next to the required parameter set. The Edit an existing parameter set page will be displayed. Then perform the following:

In the **Name** field modify the name of the report.

Click the **Enabled** checkbox to ensure that the report is available to system users.

Click the **Hidden** checkbox to prevent users from accessing it.

4. Click **OK**.

To delete a parameter set:

1. Click **Parameter Sets**. The Parameter Sets page will be displayed.
2. Select a folder. All the parameter sets for the selected folder will be displayed.
3. Check the box of the parameter set (or sets) you wish to delete.
4. Select the **Delete** option.
5. Click **OK**.

Edit a Report

The Web Portal provides the basic reports you need in order to understand your operations. You can, however, edit a report by selecting an existing report and modifying the parameters that define it. Parameters enable you to control the type and amount of information displayed in your report and the way in which it is presented.

Note When editing a report, you cannot change the type of resource, for example from *dialed number* to *call type*, used in the report.

To display the Reports section, click the name of the report from the basic mode homepage or from the **View Reports** page accessed from the tools page. The View Report page will be displayed.

Note The **Tools** page can only be accessed by users who have been granted Advanced Mode status. See the User Settings topic.

To edit a report:

1. Click the name of the report in your homepage. The View Reports page will be displayed.

2. Click **Edit**. The Edit Report Details page will be displayed.
3. In the **Name** field enter a new name for the report.
4. In the **Sub Title** field enter a simple question which reflects the report contents and which is used as the displayed title for the report, such as How many calls are queued?
5. In the **Description** field enter any explanatory text, if required.
6. Click the **Enabled** checkbox to ensure that the report is available to system users.
7. Click the **Hidden** checkbox to prevent users from accessing it.
8. Click **Save** to apply the new parameters.

In the Toolbar, a number of options are available:

- Thresholds** For further information about applying threshold values to report data, see the Set Report Exception Thresholds topic
- Move** Click to display the report tree and select a folder to relocate the report to. For further information see the Manage Reports topic

Set Report Exception Thresholds

Reports may contain many hundreds, even thousands of rows. Most of the data displayed in those rows reflects normal operational conditions and would fall within acceptable limits. Exception thresholds enable you to set conditions on the data displayed in the report. Any data value which fails those conditions can be highlighted, enabling you to quickly identify areas of poor performance.

To create or edit a report exception threshold:

1. Click the name of the report in your homepage.
2. Click **Thresholds**. The Set Threshold page will be displayed.
3. Select a threshold to edit. Then perform the following:

In the Name field enter the name to identify the threshold value

From the Relation drop down list, select one of the following:

1. = (equals)
2. <>(does not equal)
3. IIN (If In)

Then enter the value in the field provided.

If however, you selected the IIN option, two value fields will be displayed. Enter the lowest and highest value, or a comma-separated list of values to match.

Select the Back color, Font color and Font size from the relevant drop down lists. Then select the radio buttons of the font attributes; Bold, Italic or Underlined.

4. Click **OK**.

System Manager

Manage the System

Page Access and Use

Use the Systems Management tool page to create resource folders and resources.

To display the System Manager section, click Tools then click the System Manager header and the System Manager tools page will be displayed.

Tip Alternatively, if you use the System Manager tool regularly you may wish to make it your default page. To do this:

1. Click **Settings** and the Settings page will be displayed.
2. Click **User Settings**.
3. Select System Manager from the Default Homepage drop-down list.
4. Click **OK**.
5. Click **Home**. The System Manager will be displayed as your homepage.

Note The **Tools** page can only be accessed by users who have been granted Advanced Mode status. See the User Settings topic.

Using Portal with other Provisioning Systems

Unified CCMP can be used alongside other provisioning systems, such as the Hosted Unified Communication System (HUCS) and Cisco Unified Provisioning Manager (CUPM), but should not be used to provision resources normally provisioned by the alternate system, as these resources may be deleted.

What are Resources?

Resources are the entities in the system which reports display data about. Each tenant in the system has resources assigned to them, such as dialed numbers, agents and so on. These resources are used on a daily basis as a part of contact center network operations. Reports show you how these resources are used. However it is important to differentiate between the types of resources used by the system. There are two different types:

- System Items** (users, folders and so on) are entities which can be created and managed in the system. For further information see the resource links below.
- Resource Items** (agents, dialed numbers and so on)

The system resources you can create and manage are:

- Code Group** This item is not required or used by Unified CCMP.
- Dashboard** This item is not required or used by Unified CCMP

- **Dashboard Layout** This item is not required or used by Unified CCMP.
- **Folder** The placeholders in the system for related information. For further information see the Manage Folders topic.
- **Group** The contact center team members who are permitted to access Unified CCMP. For further information see the Manage Groups topic.
- **Information Notice** A means of displaying information to all users. For further information see the Manage Information Notices **topic**.
- **Report Parameter Set** The means by which contact center data is organized and displayed. For further information see the Manage Reports topic.
- **Report Data Source** This item is not required or used by Unified CCMP.
- **Report Style Sheet** This item is not required or used by Unified CCMP.
- **User** The contact center members who are permitted to access Unified CCMP. For further information see the Manage Users topic.

The resource items you can create and manage are:

- **Person** The representation of a physical person on the system. A person can be a user and/or one or more agents. For further information see the Manage Persons topic.
- **Agent** A person who handles customer contacts. For further information see the Manage Agents topic.
- **Agent Desktop** A set of permissions or settings for a particular agent, such as how much time is allocated to wrap-up and what outbound calls can be made. For further information see the Manage Agent Desktops topic.
- **Agent Team** A group of agents, managed by one or more supervisors. For further information see the Manage Agent Teams topic.
- **Skill Group** A collection of agents with the same skills and assigned to a single media routing domain. For further information see the Manage Skill Groups topic.
- **Enterprise Skill Group** A logical grouping of skill groups. These may be from different media routing domains. For further information see the Manage Enterprise Skill Groups topic.
- **Call Type** A category of incoming routable task. The call type determines the routing script that is run for the call. For further information see the Manage Call Types topic.
- **Dialed Number** The number dialed by the caller. This helps to determine the call type. For further information see the Manage Dialed Numbers topic.
- **Label** A string that is passed to a routing client for each network target. For further information see the Manage Labels topic.

- **IP Phone** An IP device with a single line used by an agent to make and receive calls. For further information see the Manage IP Phones topic.
- **Directory Number** The line connected to an IP Phone. For further information see the Manage Directory Numbers topic.
- **Device Profile** The profile of a user from Unified Communications Manager which will be applied to the phone to which they login.
- **User Variable** A named object that holds a value - often used in routing scripts. For further information see the Manage User Variables topic.
- **VRU Script** A script used by the voice response unit to play a message at the caller. For further information see the Manage VRU Scripts topic.

Note You cannot provision a VRU Script through the Management Portal, you may only change its associated audio file.

Note You may also view the details of items provisioned through Unified CCE/ Unified CCH, such as Media Routing Domain or Script, but you will not be able to edit these.

Note A resource can be successfully provisioned in Unified CCMP even if it cannot be provisioned within Unified CCE/ Unified CCH. In this case it will remain in the Pending Active state.

What is the System Manager tool?

The System Manager tool allows the user to partition their resources in a hierarchical structure. This is achieved by the use of a folder tree located at the left hand side of the tool. The user may view the subfolders of specific folders by selecting them. Users with sufficient security privileges can access and manage the entire contents of the system via the **System Manager** interface. The Web Administration Portal lets you remotely configure and administer key aspects of your Unified CCE/ Unified CCH system including:

- Agents, agent teams, skill groups and desktop settings
- Dialed numbers and call types

Note You cannot manage security in the System Manager. See the Manage Security topic for details of how to manage security in the Management Portal.

The System Manager tool consists of the following panels:

- **The standard toolbar, breadcrumb trail** (which shows the path by which the user accessed the current page) and **Information Management panels** are displayed at the top of the browser.
- The **Folder Tree** panel is displayed on the left of the browser. The folder structure partitions all the resources the user is allowed to see based on their security rights (for further information see the Tree Structures topic). Selecting a folder allows you to see its contents in the Items panel. There is a minimize arrow located on the right edge of

this panel to give the user more screen space if the folder tree is not required.

- The **Items** panel is displayed in the middle of the browser. The Items panel shows the items contained in the currently selected folder. Selecting a type of resource displays a list of items of that resource type in the currently selected folder. Selecting a particular item allows you to see its contents in the Details panel. There is a minimize arrow located on the right edge of this panel to give the user more screen space if the resource items list is not required.

Note Not all of the item types displayed can be provisioned or edited through Unified CCMP

- The **Details** panel is displayed on the right hand side of the browser. This panel displays the details of the resource item currently selected in the Items panel. If you have sufficient security permissions, you may be able to edit these.

Anchor Resources

If a tab is selected in the right-hand Details panel, then when the selected item is changed in the center Items panel the view is anchored by the Details panel so that the same tab will be viewed for the new item.

The reverse is also true: if you select an associated resource that is shown in the Details panel (for example, a skill group would be an associated resource shown for an Agent), the type of resources shown in the Items panel will also change.

Tree Structures

The tree structure is organized into folders and tenant folders, which contain all the information relevant to reporting; the resources (such as dialed numbers) whose data is used in reports, the customers who own those resources and system security; the system users and user groups who provide customer service, their assigned user or group rights, called roles, and the system functions, or tasks which comprise them.

Organizing the tree contents

All the information relevant to the system is organized into tenant and resource folders. Each customer in the system is represented by a unique tenant folder and each system resource (dialed numbers, IVR scripts, and so on) owned by that customer are contained in related resource folders.

System security is based on the permissions that users have on these folders and the items within them. Security roles define how the user may access the customer and resource information in the system (a user may not even be permitted to see information that is not relevant to them), for example you may be allowed to run a report, but not change or delete it. More information on security is available in the Security Management section.

Navigating the Folder Tree

Tree structures can be expanded and contracted using the + (plus) and - (minus) icons displayed next to a folder. Folders are organized into a parent and child structure. Any folder with the + icon displayed next to it is a parent folder, which contains related subfolders or child folders. Click on the + icon to expand the tree and display the list of child folders contained in the parent folder. Similarly, click the - icon to collapse the tree and hide child folders.

Managing the Tree

The tree contains the entire contents of the system, but will only display the folders and tenants that are relevant to you as defined by your security (login) credentials.

Resource Folder Tree Panel

Panel Access and Use

This panel is displayed at the left of the browser and shows the user of the System Management tool the hierarchical partitioning structure typically setup by the tenant administrator. The user may select one folder at a time and view the items inside. The folder tree can be minimized using the arrow at the right of the panel.

What is a Resource Folder?

Users, customers and resources are contained in folders, which are organized into a tree hierarchy. The tree is organized into a standard, familiar structure with the root folder at the top of the tree; this is usually the service provider. Beneath the root folder, customers, their resources and the users who can access them are organized into parent/child folders. Folder management is accessed via the System Manager section. Each customer in the system is represented by a unique tenant folder and each system resource (dialed numbers, agent teams and so on) owned by that customer are contained in related resource folders.

Note

It is possible to have many layers of resource folders

There are several types of folder:

- Unallocated* system folder. This is a single system folder that contains all the resources that are not allocated to a tenant or shared across all tenants. It may only be accessed by the host Administrator.
- Shared* system folder. This is a single system folder that contains resources that may be shared across tenants. It may only be accessed by the host Administrator.
- Tenant* folder. There is one folder per tenant recorded in the system and each is normally created by the host Administrator.

How to Create a Resource Folder

To create a folder:

1. Select the position in the folder tree where you wish the new folder to be added (for example, the tree root folder or within a customer folder).
2. In the Items panel, select New ▼ > System Item > Folder.
3. The Create a new Folder page will be displayed.

Alternatively, click **Tools**. The Tools page will be displayed. Click **Create a Folder**. The Create a new folder page will be displayed.

Caution It is not possible to modify a folder once it has been created, therefore choose the information to be entered into the following fields with care:

- In the **Name** field enter a name for the new folder.
- In the **Description** field enter any explanatory text for the folder, if required.
- Uncheck the **Inherit Permissions** box to turn this folder into a *policy root* that does not inherit security permissions from its parent folder.
- Click **Save** to save the new folder in the tree.
- Select the **Create Another** checkbox if you wish to create further folders to be placed into the tree structure at the same level.

Note A folder inherits the security properties of the parent folder. Tenant folders stand alone and do not inherit any security permissions from a parent folder.

How to Bulk Create Folders

In addition to creating folders one at a time, you can also bulk load folders previously output to a CSV (comma separated values) file. In this version bulk folder upload is only available to users assigned the “Manage Site” task. This is because security checks are not performed on the actions resulting from the upload. See the Bulk Upload section for further information.

How to Delete a Resource Folder

To delete a folder:

1. Move all the resources in the folder and child folders to a different folder, or delete them.
2. In the resource items list panel, select the checkbox of the folder to be deleted.
3. Click the **Delete** button. The folder and its subfolders will be removed from the tree.

How to Move a Resource Folder

To move a folder:

1. In the Items panel, select the checkbox of the folder to be moved.
2. Click the **Move** button.
3. The Move the current items page will be displayed, showing the folder tree.
4. Select the folder location in the tree that you wish to move the selected folder to.
5. Click **OK**.

Items Panel

Panel Access and Use

The **Items** panel is designed to show the items contained in the folder selected in the Folder Tree panel. It has its own tool bar containing **New**, **Upload**, **Move** and **Delete** buttons that represent operations that can be performed within that selected folder. From the displayed list, you can perform various actions on the item, such as edit, move or copy. *The actions that can be performed depend upon the item selected.*

List Resource Items

To list resource items:

1. From the left hand Folder Tree panel select a folder using a left mouse click. A list of summary totals of the resources available in this folder will be displayed.
2. In the Items panel, click on the type of resource you wish to view.

Note You can return from viewing a particular item type to viewing the summary list of resources by clicking on the folder in the left hand Folder Tree panel again.

Note The paging of the resources is an essential feature since the folder may contain many thousands of items. An attempt to list this many items would cause the browser great difficulties, perhaps even causing it to crash.

Tip The list of paged resource items may further be refined by using the Find facility. If the user enters text into the Find box and presses Find then the returned list shows only those resources that contain that text.

By default items are identified by their user-entered names, but the icon located next to the search box allows you to toggle the view of unique Enterprise Names of items instead.

Select a Resource Item

Resource items are selected in two different ways for two different purposes.

To select one or more resource items to move or delete, click on the checkboxes to the left of the items. You can select or deselect the entire list by clicking on the checkbox above the list.

To view or edit the properties of a single resource item, click on the item located in the list. The properties will be shown in the Details panel.

Create a Resource Item

To create a new resource item:

1. On the Items panel, hover your mouse pointer over the down arrow ▼ beside the New option. Select the correct category of item (choose between system items such as folders and groups, and resource items such as agents), and select the correct resource.
2. A new page will be displayed. The contents of this page depend on the resource that is being created. Fill in the details and press **OK** to confirm or **Back** to cancel the operation.
3. You will be returned to the System Manager and the new resource item will appear in the resource item list.

Tip You can create a resource item of the same type as those you are currently viewing by simply clicking the **New** button.

Move Resource Item(s)

To move a resource item(s):

1. On the resource items list select one or more resource entries checkboxes.
2. Click the Move toolbar button and the right hand panel will display a confirmation dialog.
3. Press the OK button to cause the Web Portal to begin the move operation.

Delete Resource Items

To delete a resource item(s):

1. On the resource items list select one or more resource entries checkboxes.
2. Click the Delete toolbar button and a confirmation dialog will be displayed.
3. Press the OK button to cause the Web Portal to begin the delete operation.

Merge Resource Items

Some item types allow merging. This means that multiple items of similar type located on different equipment may be combined into one single resource.

To merge resource item(s)

1. On the resource items list select one or more resource entries checkboxes.
2. Click the Merge toolbar button.

You will navigate to a new page allowing you to define the merge behavior.

On the merge resource interface perform the following steps to combine your selected items:

1. Ensure the selected items are correct, adding any addition items from the data grid located on the right
2. Remove any items from the selected items on the left of the page that should be merged
3. Ensure that the nominated master record is correct. This should be the record to which other items will be merged into
4. Press the **Merge** button
5. Confirm that the changes are correct, select the **Clean-up old items** checkbox to remove any old items that are not mapped to other pieces of equipment
6. Press the **Confirm** button to complete the change and return to the system manager

Details Panel

Page Access and Use

Use the resource items page to enter or change the details and associations of the selected resource type, such as agent.

To create a new resource item from the Web Administration menu select System Manager > Resource Folder > Resource Item > New > <resource type>.

To edit an existing resource item from the Web Administration menu select System Manager > Resource Folder. Select the resource type from the list in the middle panel and then select the item to be updated by clicking on its name.

The user is presented with a tabbed dialog, each tab representing an operation to be performed.

Details Tab

The details tab is a form which contains a series of fields for information that belong to the resource, such as First Name in the case of an Agent.

Each field may be either mandatory, optional or read-only (that is, Unified CCMP fills it in automatically). Each field has a help text item to guide the user on its use and an indication as to whether it is mandatory or not.

Associations Tab

Depending on the type of resource there may be one or more association tabs that allow the user to associate other resources with this resource. For example, if a skill group has been selected then there will be an Agents tab to allow the user to specify which agents are to be associated with this skill group.

Tip The associations are normally symmetrical in that they can be modified from each "side" of the association, so for example to add an agent to a skill group you can either select the skill group and use its agents tab or select the agent and use its skill group tab.

Each association tab has two sub-panels, one above the other. The top sub-panel shows the resource items that are already associated with this resource, the bottom sub-panel shows the available resources that may be added. The contents of this available items sub-panel is filtered by the logged in user's security privileges and any other pertinent business rule. For example, if adding agents to a skill group then the sub-panel will only show those agents who are on the same peripheral as the skill group.

The user may move resource items between the top and bottom sub panels in order to get the required associations.

Advanced Tab

Depending on the type of resource there may also be an advanced tab. This shows information that is normally set by the system but may be overridden by the user.

History Tab

The history tab shows audit information for the resource.

Where an event involves another resource, for example adding an agent to a skill group, the resource is linked to in the description. If a drop-down arrow is shown beneath an event, you can click on it for more information (such as the user who performed the event). A Request event indicates a change made using the Management Portal's user interface; an Execution event indicates that the requested changes were successfully made on Unified CCE/ Unified CCH. Success or failure of the event is shown by a green tick or red cross.

If the audit history for a resource is long, you can use the Edit Filter link to show only certain events, such as unsuccessful change attempts.

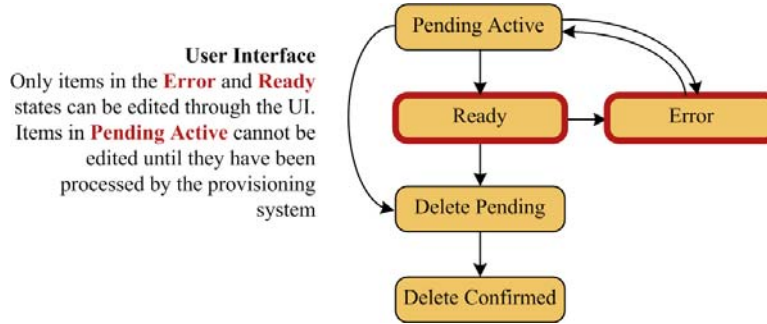
Status Tab

The status tab shows the current status of the resource and its related resources. This enables you to see whether any problem with a resource originates with that resource or with its related resources. For example,

when creating an Agent, if it enters the Error state that might indicate a problem with provisioning the related Person.

Resource States

Each resource in Unified CCMP can be in one of five states that indicate its stage in the resource life cycle.



Pending Active

When a resource is successfully created or changed using the Management Portal's web interface, its state is set to **Pending Active** (sometimes shortened to just **Pending**). This indicates that while it has been provisioned successfully within Unified CCMP, it has not yet been fully provisioned within Unified CCE/ Unified CCH. A resource can be deleted while it is in this state.

Note A resource can be successfully provisioned in Unified CCMP even if it cannot be provisioned within Unified CCE/ Unified CCH. In this case it will remain in the **Pending Active** state.

Ready

When a resource has been successfully provisioned within both Unified CCMP and Unified CCE/ Unified CCH its state will be set to **Ready**. A resource will normally remain in this state until it is deleted.

Error

Where Unified CCMP is unable to provision the resource on Unified CCE/ Unified CCH, it will enter the **Error** state. You can attempt to fix this either by editing the item, in which case its state will become **Pending Active** again, or you can delete it, in which case it will be set to **Awaiting Deletion** (also know as **Delete Pending**).

Awaiting Deletion

When you delete a resource through the web interface (or when Unified CCMP automatically deletes a resource that has reached its **Active to date**) it enters the **Awaiting Deletion** state, which means that it has been

successfully marked as deleted within Unified CCMP but has not yet been deleted from Unified CCE/ Unified CCH.



Deleted

Once the resource has been successfully deleted from Unified CCE/ Unified CCH it enters the state **Deleted**. Resources are never actually deleted from the Management Portal, only set to the state **Deleted**, as their histories are kept for audit reporting purposes.

Uploading Resources

The bulk upload tool is used to import hundreds of resource items into the Unified CCMP platform. It is used to generate dimensions such as an Agent or a Skill-Group by filling in dimension attributes using the standard CSV format.

All CSV files require headers which dictate where each value goes. To facilitate this Unified CCMP uses CSV templates. There is a Template for every dimension type; for example, one for Agents, one for Skill-Groups, and so forth.

Note Templates do not inform you the value type allowed in the field, for example, numeric values.

Member Attributes

Member attributes such as Peripheral Member or Desk Setting Member can always be removed from the CSV file completely, this means the relationship will never be set in any row in the CSV file. Alternatively you can leave this field blank, so there will be no relationship for that particular row.

Editing CSV files

You can use Notepad, or any other text-based editor to edit CSV files. Excel also offers support for CSV files so you can edit these in a familiar environment whilst maintaining the integrity of the CSV format.

Note There are a few known issues with Excel and the CSV format. If you find the CSV is corrupt after editing it in Excel, edit the file in a standard text editor such as Notepad and check the file for missing commas.

Template Guide

This section runs through every Template and describes the columns included in the Template.

For further information about the Data Type column in the tables below see the **Data Types** on page 47.

Global Template Columns

These columns are common to every template file.

The **Required?** column in the tables below tells you if you can remove the column should you not wish to set a value. An asterisk indicates that this column cannot support a field that is empty.

The **Description** column tells you if you may leave the field blank. Anything with **No** in this column must appear in every CSV file otherwise the upload will fail.

COLUMN NAME	DATA-TYPE	REQUIRED?	DESCRIPTION
Path	Path	No	Describes where in the Tree the dimension will be created. If you wish to supply the path in the bulk upload screen, you must remove this column. Note If you leave the column present and do not set a value, it will attempt to upload into the Root directory, which is valid for items such as folders, but not for resources such as Agent or Skill Group. Removing the column completely allows you to control the path via the bulk upload control screen.
Name	SNC	Yes*	The name of the dimension in Unified CCMP. This must be unique and won't ever be provisioned.
Description	-	Yes	Describes the dimension being created. This never gets provisioned.
Enterprise Name	SNC	Yes*	The name for the dimension being created. This does get provisioned and cannot be omitted. If you leave it blank an Enterprise name is generated for you.
Effective From	Date	No*	The date from which the dimension is active from, default is today.
Effective To	Date	No*	The date from which the dimension is inactive default is today.

Agent Template

COLUMN NAME	DATA-TYPE	REQUIRED?	DESCRIPTION
Peripheral Member	Enterprise Name	Yes*	The Peripheral to assign this Agent to.
Desk Setting Member	Enterprise Name	No*	The Desktop this Agent will use.
Person Member	Enterprise Name	Yes	The Person that this Agent represents.
Agent Team Member	Enterprise Name	No*	The team this agent belongs to. The team must be on the same Peripheral otherwise provisioning will fail. This column may also be subject to capacity limitations. For example, there may only be so many agents allowed in a team and that team has already reached its capacity.
Portal Login	-	No	This column is a placeholder for a future feature and cannot be used yet. It is recommended that you remove it before uploading.
First Name	SNC	Yes*	The first name of the agent.
Last Name	SNC	Yes*	The last name of the agent.
Login Name	SNC	Yes*	The peripheral login name for the agent.
Pass Phrase	Password	Yes	The peripheral login password for the agent.
Supervisor	Boolean	No	Indicates whether the agent is a supervisor. This won't create a Portal user, as this is a future feature, however it enables you to bind this agent to a domain login name.
Peripheral Number	Numeric	Yes*	The service number as known at the peripheral, note that you cannot leave this field empty.

COLUMN NAME	DATA-TYPE	REQUIRED?	DESCRIPTION
Agent State Trace	Y/N	No	Indicates whether the software collects agent state trace data for the agent.
Domain Login Name	NETBIOS Login Name	No - if Agent is not a supervisor	The login name for the domain user the agent is bound to. This is only relevant if the Supervisor field is set to TRUE. Example: DOMAIN\USERNAME
Domain User Name	NETBIOS Username	No - if Agent is not a supervisor	The username of the domain user. So for the <i>Login-name</i> : DOMAIN\USERNAME, the Username is simply USERNAME.

Folders Template

COLUMN NAME	DATA-TYPE	REQUIRED?	DESCRIPTION
Security	CSS Styled List	No	Allows you to set security on the folder you upload. To see an example, see Incorrect Data type Example on page 47.

Agent Desktop Template

COLUMN NAME	DATA-TYPE	REQUIRED?	DESCRIPTION
Wrap up Incoming Mode	Numeric	Yes *	Indicates whether the agent is allowed or required to enter wrap-up data after an inbound call. 0= Required 1 = Optional 2= Not allowed
Wrap up Outgoing Mode	Numeric	Yes *	Indicates whether the agent is allowed or required to enter wrap-up data after an outbound call. 0= Required 1 = Optional 2= Not allowed

COLUMN NAME	DATA-TYPE	REQUIRED?	DESCRIPTION
Wrap-up Time	Numeric	Yes*	The amount of time in seconds (1-7200) allocated to an agent to wrap up the call
Remote Agent Type	Numeric	Yes *	Even though this field is mandatory, it is not actually used until version 7.2 of ICM, see the ICM documentation for more details.

Agent Team Template

COLUMN NAME	DATA-TYPE	REQUIRED?	DESCRIPTION
Peripheral Member	Enterprise Name	Yes *	Same as Agent Peripheral Member.
Dialed Number Member	Enterprise Name	No	The dialed number to use for this Agent team.

Enterprise Skill Group Template

This does not contain any dimension specific columns.

Skill Group Template

COLUMN NAME	DATA-TYPE	REQUIRED?	DESCRIPTION
Peripheral Member	Enterprise Name	Yes *	Same as Agent Peripheral Member.
Peripheral Number	Numeric	Yes *	Same as Agent Peripheral Number.
Peripheral Name	SNC	No *	The name of the Peripheral as it is known on the site.
Available Hold-Off Delay	Numeric	No	The value for this Skill Group instead of using the one associated with this peripheral.
IPTA	Y/N	No	Indicates whether the ICM picks the agent.

COLUMN NAME	DATA-TYPE	REQUIRED?	DESCRIPTION
Service Level Threshold	Numeric	No	The service level threshold, in seconds, for the service level. If this field is negative, the value of the Service Level Threshold field in the Peripheral table is used.
Service Level Type	Numeric	No	For Non-UCCE, indicates how the ICM software calculates the service level for the service. See the ICM documentation to determine value meanings. Valid Values are 0, 1, 2 or 3.
Default Entry	Numeric	No	Normal entries are 0 (zero). Any records with a value greater than 0 are considered a default skill group for configuration purposes. Records having a value of 1 are used by OPC as the default target skill group.
Extension	Numeric	Yes *	The extension number for the service (used by Lucent DEFINITY ECS).

User Variable Template

This does not contain any dimension specific columns.

Using the Bulk Upload Tool

To use the bulk upload tool, perform the following:

1. Open the System Management page.
2. Select the required tenant.
3. Click **Upload** and then select the item types you want to bulk upload from the drop down list. The Bulk Upload Control page is displayed.

Note This path will only be used if you have removed the **Path** column in the CSV file. This is not relevant for folders as the path option is not available.

4. Select a template for your chosen dimension. The template link is present in the horizontal toolbar near the top of the page. Once

selected, a download box is presented allowing you to save this CSV file onto your machine.

5. Once saved you can open it in the editor you require and begin to enter your data or paste it from another source.
6. Return to the Bulk Upload Control page and make sure the path is set correctly.
7. Browse to the CSV file you have just entered the data into. Click Upload. A progress bar at the bottom of the screen displays the upload progress.

Note Do NOT upload more than 500 items per CSV file.

If something goes wrong, pause the upload and check why an item failed. For further information about how an upload can fail, please see the **Reasons for Upload Failure** later in this document.

If the upload tool encounters a problem that affects all rows and not just the current one, an alert box appears that describes the problem's description and will return you back to the **Bulk Upload Control** page.

Once every row has been processed a summary dialog appears to inform you of how many rows failed and how many passed. Please note this dialog does not give you the result of provisioning these items; only the result of uploading the items into the Unified CCMP system.

Data Types

The following data types are used:

- SNC** means Standard Naming Convention and is the same as the UI allows in the name fields on the provisioning pages. That is, alphanumeric characters, no exclamation mark or hyphens, and so on
- BOOLEAN** means one of the following values:
 - TRUE
 - FALSE
 - Empty field. Leaving these fields empty defaults the field to FALSE
- Y/N** is similar to Boolean however it can only contain the values Y or N
- Date format** is the universal date format <Year>-<Month>-<Day> for example 2006-08-30
- Any Data Type marked with a hyphen (-) means that there are no constraints on what you can put in the field (except for the constraints imposed by the native CSV format)

Incorrect Data Type example

It is vital to make sure that the values you place in the template are of a valid data-type. In the example below, an alphabetic data type has been used instead of a numeric one for a single field.

Name,Description,PortalLogin,FirstName,LastName,LoginName,PeripheralNumber,BadAgent,importedagent,bada,bada,bada,bada,p

Note Some required columns have been omitted for the sake of simplicity.

This produces the following error:

```
System.InvalidCastException: The Peripheral Number is not numeric
```

Agent Security Field Example

Dos-styled Syntax Example:

```
<USERORGROUPNAME>:<ROLENAME>;<USERORGROUPNAME>:<ROLENAME>[:<MULTIPLEROLENAME>]
```

This is an example of what can be put into the **Security** field in the agent CSV file.

```
// #1 a single user with a single role
Administrator:Tenant User
// #2 a single user with more than one role
Administrator:Tenant User:Tenant Supervisor
// #3 multiple users
Administrator:Tenant User:Tenant Supervisor;User1:Tenant User
```

Users are separated by semicolons, and the user and roles are separated by colons. This is very similar to the CSS syntax with the exception that a user or group can have multiple roles rather than one value.

Reasons for Upload Failure

The table below details the causes as to why an upload can fail.

EXCEPTION TYPE	REASON
No Capacity Left	The capacity limit has been reached.
Enterprise Name Already Exists	The enterprise name already exists.
Login Name Already Exists	The peripheral login name already exists.
SQL Exception	The SQL error during upload, usually due to bad data.
Argument Exception	An attribute contains a bad value. It is usually an exception because you have an empty string in the Path column when attempting to upload items which cannot live in the Root folder.
Security Exception	You do not have security permissions to upload to here.
Format Exception	Invalid data in a column.
No Identity Available	Identity not available.

Agent Management

Manage Persons

Page Access and Use

Use the **Persons** page to create, edit, and delete individual persons, and to define their access to Unified CCMP(if any) and their associated agents. To open the page, from the Web Administration menu, select **System Manager > Resource Folder > New ▼> Resource Item > Person**.

What is a Person?

Each person item represents a single physical person who handles customer contacts or uses the Management Portal. This person may be associated with a user account on the Management Portal, with one or more Agents or Unified Communications Manager users.

Note To associate a person with more than one Agent, each Agent must be on a different peripheral

How to Create a Person

To create a person:

1. On the **Items** panel, click **New ▼ > Resource Item > Person**.
2. Enter a first name, last name, login name and password for the person. They will use the details specified in the **Login Name** box to log on to their Agent Desktop. Names can be up to 24 characters long, and must consist of letters, numbers, underscores and periods only.
Note The login name details cannot be edited once the agent has been created.
3. Complete fields as described in the Persons fields table below. Active from and to dates can be set in the **Advanced** tab.
4. If the person is to have a Portal account, fill in the fields in Unified CCMP tab.
5. Click **Save**.

Note Once created, a Person's Portal Account details cannot be edited via the agent. You must edit the user directly

How to Bulk Create Persons

In addition to creating persons one at a time, you can also bulk load person records previously output to a CSV (comma separated values) file. See the Uploading Resources section for further information.

How to Change a Person's Peripheral Login

To change a person's peripheral login:

1. On the **Equipment** tab, check the **Change Password** checkbox.
2. Enter a new password and confirm.
3. Click **Save**.

How to Delete a Person

To delete one or more persons:

1. On the Items panel, select the person record(s) you want to delete.
2. Click **Delete**.
3. A message prompts you to confirm the deletion. Click **OK**.

All agents associated with those persons will also be deleted.

Person Fields

Field	Description	Entry	Default	Required?
<i>Default Details Tab</i>				
First Name	The person's first name.	Up to 24 characters.	Null	Yes
Last Name	The person's last name.	Up to 24 characters.	Null	Yes
Description	A description of the person.	Up to 255 characters.	Null	No
Login Name	<p>A unique login name for the person to allow them to login to the peripheral. This is the default entry that will be used for all equipment mappings unless overridden in the equipment tab.</p> <p>Note: The Unified CCE/ Unified CCH database is case-insensitive in determining whether a login name is unique - for example, it considers "joe_smith" and "JOE_SMITH" to be the same. Further, agent login to agent desktop software (such as CTI OS) is not case-sensitive.</p>	Unique. Up to 24 characters, letters, numbers, and underscore characters only. Must begin with letter or number.	Null	Yes

Field	Description	Entry	Default	Required?
Password	The default password used by equipment mappings unless explicitly set in the equipment tab	Unique. At least five letters long. Longer passwords, including numbers and other characters, may be required. Ask your system administrator for details.	Null	Yes
Password Confirmation			Null	Yes
Changes to the default details will only be reflected on equipment mappings that have not been customized.				
<i>Equipment Tab</i>				
Unified ICM	A selection as to whether or not this person exists on Unified ICMH/ Unified ICME	Checkbox, true or false	True	N/A
Unified ICM Equipment	The Unified ICMH/ Unified ICME instances to which this person record is assigned	The list of Unified ICM's to which the person may be added. Check box list	False	N/A
Unified CM	A selection as to whether or not this person exists as a user on the associated Unified Communications Manager	Checkbox, true or false	False	N/A
Unified CM Equipment	The Unified Communications Manager from the cluster that this person is tied to	The list of Unified Communications Managers to which the person may be added. Check box list	False	N/A
The above mentioned equipment lists provide a mechanism for customizing the details on a per equipment basis.				

<i>Portal Tab</i>				
Create Account	Check this box to create a basic Portal user account for this person. It is advantageous for supervisors to have a Portal account in order to manage their teams.	Checkbox	Unchecked	No
Login Name	The unique name of Unified CCMP user account.	Unique. Up to 24 characters, letters, numbers, and underscore characters only. Must begin with letter or number.	Null	If Create Account checked
Password	The password that the person will use to log in to the system.	Unique. At least five letters long. Longer passwords, including numbers and other characters, may be required. Ask your system administrator for details.	Null	If Create Account checked
Confirm Password	The same as for the Password field. This ensures that the person is not prevented from logging into Unified CCMP by typographical errors made when setting his or her password.		Null	If Create Account checked
Groups	Allows you to assign the user to one or more security groups, such as the Supervisors group. You can only assign a user to groups you have permission to modify.	Check the boxes of the security groups this user should be a member of.	Unchecked	No

<i>Advanced Tab</i>				
Active From Date	The date from which the person will be active in the system.	Select from calendar.	Current date	Yes
Active To Date	The date after which the person should be deleted from the system.	Select from calendar.	Forever	No

Manage Agents

Page Access and Use

Use the Agents page to create, edit, and delete agents and supervisor agents, and to define agent properties such as passwords, voice skill group associations, and desk settings. To open the page, from the Web Administration menu, select **System Manager > Resource Folder > New ▼ > Resource Item > Agent**.

What is an Agent?

An agent is a person who handles customer contacts. In Unified CCE/ Unified CCH, each agent can be a member of one or more skill groups. You can group agents into agent teams, which associate each with a specific supervisor or supervisors.

Each agent record must be associated with a Person. During agent creation, you can choose either to associate the agent with an existing person, or to create a new person for that agent. Multiple agents can be associated with a single person, should it be necessary (for example, someone who provides cover for teams on different peripherals will need to be represented by a separate agent account on each peripheral used).

Note In order to use non-voice applications (that is, Cisco Collaboration Server and Cisco E-Mail Manager), agents must be enabled for non-voice use and assigned to non-voice skill groups via the administration interfaces for these multi-channel applications. Thus, while you can create all of your new agent records using the Management Portal, you will need to use the administration interfaces of these non-voice applications to configure agents for their use.

How to Create an Agent

To create an agent:

1. On the **Items** panel, click New ▼ > Resource Item > Agent
2. Enter a first name, and select a peripheral and Person to associate the agent with. You can choose either to associate the agent with an existing Person, or to create a new Person for that agent.

Select Existing Person Select a person from the drop-down list, or search for a specific person by typing a part of their name in the

Search box. The new agent will use the details specified in that Person's **Peripheral Login** box to log on to their Agent Desk Setting.

Create New Person Enter the first name and last (or family) name for the person, and fill in the details they will use to login to the peripheral. The person will be automatically created and associated with the agent.

Note Multiple Agents may be associated with a single Person, if all Agents involved are on different peripherals.

3. Complete fields as described in the Agents fields table below. Active from and to dates can be set in the **Advanced** tab.
4. Click **Save**.

Once you've created an agent, you can assign that user as the member of an Agent Team, and to one or more Skill Groups

What is a Supervisor Agent?

A supervisor agent is an agent who has a user account on Unified CCMP that allows them to view reports and administer agents and agent teams. While a supervisor agent does not have to be assigned to supervise a specific team, an agent must be a supervisor agent to supervise a team.

A team supervisor may be a *primary* or *secondary* supervisor. A team may have any number of secondary supervisors, but only one primary supervisor.

You can define an agent to be a supervisor agent by checking the **Supervisor** checkbox.

Note When an agent is set to be a supervisor agent, then if the associated Person has a Portal user account, that user should be added to the Supervisors security group, which allows users to edit agents and agent teams

Adding an Agent to a Team

You can use the Agent Teams tab to change the team an agent is a member of and, in the case of a supervisor agent, to set the agent as primary or secondary supervisor for one or more teams.

Note A supervisor agent does not need to be a member of a team to supervise it.

To Add an agent to a team as either a supervisor or a member:

1. On the Items panel, select the agent record you wish to add to one or (if a supervisor) more teams.
2. In the Details panel, click on the **Agent Teams** tab.

Details Supervisor **Agent Teams** Skill Groups Advanced

Listed below are the selected Agent Team items to be associated with this resource total 3

Name	Status	Active Dates	Primary Supervisor	Member	Supervisory Role
<input type="checkbox"/> AARQU.CM1_1.DOMESTIC_SALES_6.AT	Ready	Forever	None	<input type="checkbox"/>	Primary
<input type="checkbox"/> AARQU.CM1_1.DOMESTIC_SALES_7.AT	Ready	Forever	None	<input checked="" type="checkbox"/>	No
<input type="checkbox"/> AARQU.CM1_1.DOMESTIC_SALES_13.AT	Ready	Forever	None	<input type="checkbox"/>	No

Selected Path

Name	Status	Active Dates	Primary Supervisor
<input type="checkbox"/> AARQU.CM1_1.DOMESTIC_SALES_13.AT	Ready	Forever	None
<input type="checkbox"/> AARQU.CM1_1.DOMESTIC_SALES_6.AT	Ready	Forever	None
<input type="checkbox"/> AARQU.CM1_1.DOMESTIC_SALES_7.AT	Ready	Forever	None
<input type="checkbox"/> AARQU.CM1_1.DOMESTIC_SALES_8.AT	Ready	Forever	None
<input type="checkbox"/> AARQU.CM1_1.DOMESTIC_SALES_9.AT	Ready	Forever	None
<input type="checkbox"/> AARQU.CM1_1.FIRST_LINE_SUPPOR.AT	Ready	Forever	None

1 2 > >>
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12 Items

Shown in the upper box is a list of teams the agent is currently assigned to, and shown in the lower box is a list of teams available in the current folder. You may see teams in other folders using the Selected Path drop-down folder list. The dates between which each team is active are displayed, as is the primary supervisor for that team.

3. Select teams in the lower box and click on the **Add** button to add the agent to them. They will automatically be moved into the upper box.
4. Check the **Member** box if the agent is to be a member of the team. This box should be checked in most cases.

Note An agent cannot be a member of more than one team, though a supervisor can supervise multiple teams.

5. If the agent is a supervisor agent, you may choose to assign them as a supervisor to that team. Select Primary or Secondary supervisor from the drop-down list. A team can have multiple secondary supervisors but only one primary supervisor.

Note If you replace an existing primary supervisor, then the replaced supervisor will automatically become a secondary supervisor for that team.

6. You can remove the agent from a team by selecting the team (or teams) in the upper box and clicking on the **Remove** button.
7. Click **Save**.

How to Bulk Create Agents

In addition to creating agents one at a time, you can also bulk load agent records previously output to a CSV (comma separated values) file. See the Uploading Resources section for further information.

How to Delete an Agent

To delete one or more agents:

1. On the Items panel, select the agent record(s) you want to delete.
2. Click **Delete**.
3. A message prompts you to confirm the deletion. Click **OK**.

Note Deleting an agent or agent supervisor will automatically remove that agent from any associated teams or skill groups, including multi-channel skill groups.

Note Deleting an agent or agent supervisor does not delete the associated person.

Agent Example

ExampleCorp has ten agents in its New York contact center, and five in San Francisco. These agents are to be divided into three teams.

First, ExampleCorp creates two teams (Green and Blue) in New York, and one (Red) in San Francisco. Then it creates five Persons in San Francisco and ten Persons in New York, creates an Agent associated with each, and adds each Agent to a team.

ExampleCorp wants the two teams in New York to be supervised by the same senior supervisor agent. ExampleCorp therefore edits this agent to make her into a supervisor agent, and adds her as a Primary Supervisor to both teams. An agent can only be a member of a single team, however, so this supervisor supervises the Blue Team without being a member of it.

The user account of the Person associated with this supervisor agent is added to the ExampleCorp_Supervisors user group.

A primary supervisor is also assigned to the Red Team.

ExampleCorp then assigns secondary supervisors. It decides that the senior supervisor agent in New York should also be a secondary supervisor of the Red Team in San Francisco. Since it is possible to have any number of secondary supervisors for each team, this does not prevent them assigning a San Francisco agent as secondary supervisor to this team as well.

Agent Fields

Field	Description	Entry	Default	Required?
<i>Details Tab</i>				
Name	A unique name for the entry. This may be the same as the login name, last name or first name fields. Your company may specify a convention for this field (such as <first name>_<last name>) to make it easier to identify agents.	Unique. Up to 24 characters, letters, numbers, and underscore characters only. Must begin with letter or number.	Null	Yes
Description	A description of the agent.	Up to 255 characters.	Null	No
Peripheral	The peripheral the agent should be created on. This will affect what teams and skill groups they may be associated with	Select from list	Default peripheral	Yes
Create New Person	Select this option if the agent record is for a new employee, or one who has not previously existed as a Person within the Management Portal.	Radio button	Checked	If Select Existing Person unchecked
First Name	The person's first name.	Up to 24 characters.	Null	Yes
Last Name	The person's last name.	Up to 24 characters.	Null	Yes

Field	Description	Entry	Default	Required?
Login Name	A unique login name for the person to allow them to login to the peripheral. Note: The Unified CCE/ Unified CCH database is case-insensitive in determining whether a login name is unique - for example, it considers "joe_smith" and "JOE_SMITH" to be the same. Further, agent login to agent desktop software (such as CTI OS) is not case-sensitive.	Unique. Up to 24 characters, letters, numbers, and underscore characters only. Must begin with letter or number.	Null	Yes
Password	The password that the person will use to log in to the system.	Unique. At least five letters long. Longer passwords, including numbers and other characters, may be required. Ask your system administrator for details.	Null	Yes
Confirm Password	The same as for the Password field. This ensures that the person is not prevented from logging in by typographical errors made when setting his or her password.		Null	Yes

Field	Description	Entry	Default	Required?
Select Existing Person	This option is used where the correct person to be associated with this agent record already exists within the system, for example if the Person record for a new employee was created before it was clear which peripheral they would be using. Select the correct person from the drop-down list.	Select from list. Filter list of persons by typing part of the person's name into the search box.	Unchecked	If Create New Person checked
<i>Supervisor Tab</i>				
Supervisor	Check this box if an agent is to be considered a supervisor. This does not require that they supervise a team.	Checkbox	Unchecked	No
Associate with Domain Account	Associates a supervisor agent with an existing domain login	Checkbox	Unchecked	If Supervisor box checked
Login Name	The existing domain login name to be used by the supervisor agent	Existing domain login name. Select from list of possibilities by typing part of the login name.	Null	If Supervisor box checked
<i>Agent Teams Tab</i>				
Agent Teams	The supervisory team with which the agent is associated.	Select from list.	Null	No

<i>Skill Groups Tab</i>				
Skill Group	<p>The voice skill group(s) of which the agent is a member. Changes to an agent's skill group membership take place immediately within the agent's current session.</p> <p>Note: Skill groups for non-voice media routing domains (such as e-mail or chat) do not display in the Unified CCE/ Unified CCH Web Configuration Tool. To enable an agent for non-voice and assign an agent to a non-voice skill group, you must do it through your multi-channel application administration tool.</p> <p>Note: You may not add an agent to a skill group if that skill group already has the maximum number of agents associated with it. This maximum number depends on the configuration of your installation of Unified CCE/ Unified CCH.</p>	Click Add to select from list.	Null	No
<i>Advanced Tab</i>				
Enterprise Name	The name used to identify the agent within the system	Unique. Up to 24 characters, letters, numbers, and underscore characters only. Must begin with letter or number.	Auto-generated from the first and last names	Yes
Agent ID	The internal extension number that can be used to call the agent.	Up to 24 numbers.	Auto-generated	Yes

Agent Desktop	The desktop settings to be associated with the agent.	Select from list.	None	No
State Trace	Enables the system to track the agent's state, such as Logged Off or Talking	Checkbox	Unchecked	No
Active From Date	The date from which the agent will be active in the system.	Select from calendar.	Current date	Yes
Active To Date	The date after which the agent should be deleted from the system.	Select from calendar.	Forever	No

Manage Agent Desktops

Page Access and Use

Use the Desktops page to create, edit, and delete agent desktops (also sometimes called agent desk settings). To open the page, from the Web Administration menu, select System Manager > *Resource Folder* > New ▼ > Resource Item > Agent Desktop.

What is a Desktop?

Agent Desktops associate a set of permissions or characteristics with specific agents. The settings are comparable to Class of Service settings on a PBX or ACD. You assign desk settings to each agent via the agent record.

When you create a desktop definition, you specify the amount of non-active time after which an agent is automatically logged out, whether wrap up is required following incoming and outbound calls, the amount of time allocated for wrap up, and the method used for assist and emergency calls. You also specify settings for the Re-route on No Answer feature.

Unified CCE/ Unified CCH ships with a system default desktop. New agent records are automatically assigned this default unless you specify otherwise when creating an agent.

How to Create a Desktop

To create a Desktop record:

1. On the **Items panel**, click New > Desktop.
2. Enter unique name of up to 24 characters for the record. This name can use alphanumeric characters, periods, and underscores.
3. Complete fields as described in the Desktop Fields table below.
4. Click **Save**.

How to Delete a Desktop

To delete one or more desktop:

On the Items panel, select the desktop record(s) you want to delete.

Note You cannot delete a desktop if it is being referenced by an Agent record or if it is specified as the Default Desktop.

Click **Delete**.

A message prompts you to confirm the deletion. Click **OK**.

How to Bulk Create Agent Desktops

In addition to creating agent desktop one at a time, you can also bulk load agent desk setting records previously output to a CSV (comma separated values) file. See the Bulk Upload section for further information.

Desktop Fields

Field	Description	Entry	Default	Required?
<i>Details Tab</i>				
Name	A unique name for the record.	Unique. Up to 24 characters, alphanumeric, period, and underscore characters only. Must begin with alphanumeric.	Null	Yes
Ring no answer time	The maximum number of seconds Unified CCE/ Unified CCH will allow a call to ring at the agent's station before redirecting the call. This can be from 1 to 120 seconds.	1 to 120	Null	No

Field	Description	Entry	Default	Required?
Ring no answer dialed number	Identifies the dialed number for a new re-route destination in the case of a ring no answer. The selection list consists of the dialed numbers configured for the system.	Select from list	Null	No
Logout non-activity time	The number of seconds during which the agent has been in the not ready state and inactive that Unified CCE/ Unified CCH will wait before logging out the agent. A blank entry will disable the timer.	10 to 7200	Null	No
Incoming work mode	Indicates whether the agent is allowed or required to enter work mode after an incoming call.	Select from Required, Optional, Not Allowed, and Required With Wrap-up Data.	Optional	Yes
Outgoing work mode	Indicates whether the agent is allowed or required to enter work mode after an outgoing call.	Select from Required, Optional, and Not Allowed.	Optional	Yes
Wrap-up time	The amount of time in seconds allocated to an agent to wrap up the call.	1 to 7200	7200	Yes

Field	Description	Entry	Default	Required?
Assist call method	Indicates whether Unified CCE/ Unified CCH will create a consultative call or a blind conference call for the supervisor assistance request.	Select from consultative call or blind conference call.	Consult	No
Emergency call method	Indicates whether Unified CCE/ Unified CCH will create a consultative call or a blind conference call for an emergency call request.	Select from consultative call or blind conference call.	Consult	No
Default Device Port Address	Changes the default port for the agent telephone.	Unique. Up to 24 characters, letters, numbers, and underscore characters only. Must begin with letter or number.	Null	No
* Quality Recording Rate	How frequently calls to the agent are recorded, in seconds.	1-99999	Null	No
* Recording Mode	Specifies whether calls are routed through the Unified Communications Manager Peripheral Interface Manager (PIM)	Select from list	Bypass	No
Remote Agent Type	Indicates how mobile agent call routing is handled.	Select from list	Local Only	Yes

Field	Description	Entry	Default	Required?
Description	A description of the desktop.	Up to 500 characters.	Null	No
<i>Miscellaneous</i>				
Auto answer	Indicates calls to the agent are automatically answered.	Checked or Unchecked	Unchecked	No
Idle reason required	Indicates the agent must enter a Not Ready reason before entering the Idle state.	Checked or Unchecked	Unchecked	No
Logout reason required	Indicates the agent must enter a reason before logging out.	Checked or Unchecked	Unchecked	No
Auto record on emergency	Specifies that a record request (a request to record the call) is automatically sent when an emergency call request starts.	Checked or Unchecked	Unchecked	No
* Silent Monitor Audible Indication	Specifies whether to indicate that silent monitoring has begun by a click.	Checked or Unchecked	Unchecked	No
* Silent Monitor Warning Message	Specifies whether to indicate that silent monitoring has begun with a message box on the agent's desktop.	Checked or Unchecked	Unchecked	No
* Available after Incoming	Whether the agent is to be automatically considered available after handling an incoming call.	Checked or Unchecked	Unchecked	No

Field	Description	Entry	Default	Required?
* Available after Outgoing	Whether the agent is to be automatically considered available after handling an outgoing call.	Checked or Unchecked	Unchecked	No
* Remote Login Without Desktop	Allows the agent to log in to the contact center without using an agent desktop	Checked or Unchecked	Unchecked	No
<i>* Outbound Access</i>				
Outbound Access	For deployments where agents can make outbound calls, determines the type of outbound calls they can make.	Select one or more from International, National, Local private network, Operator assisted, PBX, Agent to Agent, Non ACD Calls, Initiate Supervisor Calls Allowed.	Unchecked	No
<i>Agent Tab</i>				
Agents	The agents with which the desktop is associated.	Select from list.	Null	No
<i>Advanced Tab</i>				
Enterprise Name	The name used to identify the desktop within the system.	Unique. Up to 24 characters, letters, numbers, and under-score characters only. Must begin with letter or number.	Auto-generated from the name	Yes

Field	Description	Entry	Default	Required?
Active From Date	The date from which the desktop will be active within the system.	Select from calendar.	Current date	Yes
Active To Date	The date after which the desktop will be deleted from the system.	Uncheck Forever box and select from calendar.	Forever	No

Manage Agent Teams

Page Access and Use

Use the Agent Teams page to create, edit, and delete agent teams, and to assign agents and supervisors to a team. To open the page, from the Web Administration menu, select System Manager > *Resource Folder* > New ▼ > Resource Item > Agent Team.

What is an Agent Team?

Unified CCE/ Unified CCH allows you to group individual agents into agent teams that can be managed by supervisors. Agents are assigned to agent teams individually. When configuring agent teams, be aware of the following rules:

- An agent can be a member of only one agent team (or of no teams)
- An agent team can have only one Primary Supervisor
- A supervisor can be a supervisor of any number of agent teams
- A supervisor for an agent team can also be a member of that agent team

How to Create an Agent Team

To create an agent team:

1. On the Items panel, click New > Resource Item > Agent Team.
2. Enter a unique name for the team.
3. Complete fields as described in the Agent Team Fields table below.
4. To assign agents to the team, check the boxes of one or more agents in the **Agents** tab, and click on the Add button above the list.

Note The **Selected Path** drop-down opens up a folder tree so that you can also select agents from other folders to add to the team.

5. Once an agent is added to the team, you must also check their Member box to make them a member of the team. This is because it is possible to be involved with a team without being a member, by supervising it.
6. If an agent is a supervisor, a drop-down list appears in the right-hand column. You can use this to specify whether the agent has a supervisory role for this particular team.

Note A team may have multiple secondary supervisors, but only one primary supervisor. If you replace an existing primary supervisor, then the replaced supervisor will automatically become a secondary supervisor for that team.

7. Click **Save**.

How to Bulk Create Agent Teams

In addition to creating agent teams one at a time, you can also bulk load agent team records previously output to a CSV (comma separated values) file. See the Uploading Resources section for further information.

How to Edit an Agent Team

To edit an agent team, select the agent team in the Items panel. Click through the tabs and edit the fields you want to change.

To remove agents from a team, click on the agents tab and check the boxes of the agents you wish to remove from the team. Click the **Remove** button.

How to Delete an Agent Team

To delete one or more agent teams:

1. On the **Items panel**, select the agent team record(s) you want to delete.
2. Click **Delete**.
3. A message prompts you to confirm the deletion. Click **OK**.

Agent Team Fields

Field	Description	Entry	Default	Required?
<i>Details Tab</i>				
Name	A unique name for the record.	Unique. Up to 24 characters, alphanumeric, period, and underscore characters only. Must begin with alphanumeric.	Null	Yes
Description	A description of the team.	Up to 500 characters.	Null	No
Supervisor script dialed number	The dialed number identifier for the agent team.	Select from list.	None	No
<i>Agents Tab</i>				
Agents	Individual agents associated with this team.	Select from list.	Null	No

<i>Advanced Tab</i>				
Enterprise Name	The name that will represent the team within the network	Unique. Up to 24 characters, alphanumeric, period, and underscore characters only. Must begin with alphanumeric.	From Name and Peripheral	Yes
Peripheral	The peripheral to associate with the team.	Select from list.	Default peripheral	Yes
Active From Date	The date from which this team must be active within the network	Select from calendar	Current date	Yes
Active To Date	The date after which this team will be deleted from the system	Uncheck Forever and select from calendar	Forever	No

Manage Skill Groups

Page Access and Use

Use the Skill Groups page to create, edit, and delete voice skill groups, and to assign agents to these groups. To open the page, from the Web Administration menu, select System Manager > *Resource Folder* > New ▼ > Resource Item > Skill Group.

What is a Skill Group?

A skill group is a collection of agents that share a common set of skills. Unified CCE/ Unified CCH agents are assigned one or more skills by associating the agent with the desired skill groups.

Note You may not add an agent to a skill group if that skill group already has the maximum number of agents associated with it. This maximum number depends on the configuration of your installation of Unified CCE/ Unified CCH.

Each skill group is associated with a specific media routing domain such as voice, chat, or e-mail. In a multi-channel deployment (that is, an Unified CCE/ Unified CCH deployment that includes non-voice applications like Cisco Collaboration Server or E-Mail Manager), when an agent logs in (via phone, or Collaboration Server, or E-Mail Manager) the agent automatically logs into skill groups associated with that agent within the correct MRD. Then, as a task request for a specific MRD begins script execution, the Agent/IVR Controller considers only the skill groups

associated with that specific MRD. This allows one script to be written to handle many MRDs.

Note Unified CCMP does not support "sub-skill groups" - skill groups defined as a subset of a parent group.

How to Create a Skill Group

To create a skill group:

1. On the Items panel, click New > Resource Item > Skill Group
2. Enter a unique name for the group
3. Complete fields as described in the Skill Groups Fields table below
4. To assign agents to the team, check the boxes of one or more agents, and click on the Add button above the list

Note The **Selected Path** drop-down at the top allows you to select agents from other folders to add to the team.

5. Click OK

How to Bulk Create Skill Groups

In addition to creating skill groups one at a time, you can also bulk load skill group records previously output to a CSV (comma separated values) file. See the Uploading Resources section for further information.

How to Edit a Skill Group

To edit a skill group, select the skill group in the Items panel. Click through the tabs and edit the fields you want to change.

To remove agents from a skill group, click on the agents tab and check the boxes of the agents you wish to remove from the team. Click the **Remove** button.

How to Delete a Skill Group

To delete one or more skill groups:

1. On the **Items panel**, select the skill group record(s) you want to delete
Note You cannot delete a skill group that is referenced in a script. This reference must be removed before the skill group can be deleted.
2. Click **Delete**.
3. A message prompts you to confirm the deletion. Click **OK**.

Note Deleting a skill group automatically removes it from any enterprise skill groups in which it is referenced.

Skill Group Fields

Field	Description	Entry	Default	Required?
<i>Details Tab</i>				
Name	A unique enterprise name for the record.	Unique. Up to 24 characters, letters, numbers, periods, and underscore characters only. Must begin with letter or number.	Null	Yes
Description	A description of the skill group.	Up to 255 characters.	Null	No
Service Level Type	Optionally, use to indicate how abandoned calls should be factored in calculating service levels.	Select from Default, Ignore Abandoned Calls, Abandoned Calls Have Negative Impact, and Abandoned Calls Have Positive Impact. Note: "Default" = Ignore Abandoned Calls.	Default	No
Service Level Threshold	The threshold, in seconds, for the ICM service level.	1-99999	Null	No
IPTA	Whether the ICM picks the agent.	Checkbox	Y	No

Field	Description	Entry	Default	Required?
Media Routing Domain	The routing domain used for calls or emails to this skill group. This cannot be changed after skill group creation.	Select from list.	Cisco_Voice	Yes
<i>Agents Tab</i>				
Agents	Agents associated with this skill group.	Select from list and click Add .	Null	No
<i>Advanced Tab</i>				
Enterprise Name	The name that will represent the team within the network	Unique. Up to 24 characters, alphanumeric, period, and underscore characters only. Must begin with alphanumeric.	From Name and Peripheral	Yes
Peripheral	The peripheral to associate with the skill group	Select from list.	Default peripheral	No
Peripheral Number	The number to be used on the peripheral for the Skill Group	0-999999999999	Generated automatically	Yes
Active From Date	The date from which the Skill Group should be active in the system	Select from calendar.	Current date	Yes
Active To Date	The date after which the Skill Group should be deleted from the system	Uncheck Forever and select from calendar.	Forever	No

Manage Enterprise Skill Groups

Page Access and Use

Use the Enterprise Skill Groups page to create, edit, and delete enterprise skill groups. To open the page, from the Web Administration menu, select

System Manager > *Resource Folder* > New ▼ > Resource Item > Enterprise Skill Group.

What is an Enterprise Skill Group?

An Enterprise Skill Group is a logical grouping of skill groups joined together for reporting purposes. Enterprise skill groups can include skill groups from different media routing domains.

Note Unlike the Skill Groups page in Unified CCE/ Unified CCH Web Administration that displays only voice skill groups, the Enterprise Skill Groups page displays non-voice skill groups such as chat, multi-session chat, and email.

How to Create an Enterprise Skill Group

To create an enterprise skill group:

1. On the Items panel, click New > Resource Item > Enterprise Skill Group.
2. Enter a unique name for the group.
3. Complete fields as described in the Enterprise Skill Group Fields table below.
4. To assign skill groups to the group, click the **Add** button below the **Skill Groups** box and select one or more skill groups.

Note The **Selected Path** drop-down at the top allows you to select agents from other folders to add to the team.

5. Click **Save**.

How to Bulk Create Enterprise Skill groups

In addition to creating enterprise skill groups one at a time, you can also bulk load enterprise skill group records previously output to a CSV (comma separated values) file. See the Uploading Resources section for further information.

How to Delete an Enterprise Skill Group

To delete one or more enterprise skill groups:

1. On the Items panel, select the enterprise skill group record(s) you want to delete.
2. Click **Delete**.
3. A message prompts you to confirm the deletion. Click **OK**.

Enterprise Skill Group Fields

Field	Description	Entry	Default	Required?
<i>Details Tab</i>				
Name	A unique name for the record.	Unique. Up to 24 characters, letters, numbers, periods, and underscore characters only. Must begin with letter or number.	Null	Yes
Description	A description of this enterprise skill group.	Up to 255 characters.	Null	No
<i>Skill Groups Tab</i>				
Skill Groups	Skill groups associated with this enterprise skill group.	Select from list and click Add .	Null	No
<i>Advanced Tab</i>				
Enterprise Name	The name by which the Enterprise Skill Group will be known within the system.	Unique. Up to 24 characters, letters, numbers, periods, and underscore characters only. Must begin with letter or number.	Auto generates	No
Active From Date	The date from which the Enterprise Skill Group should be active in the system.	Select from calendar.	Current date	No
Active To Date	The date from which the Enterprise Skill Group should be deleted from the system.	Uncheck Forever then select from calendar.	Forever	No

Contact Management

Manage Dialed Numbers

Page Access and Use

Use the Dialed Numbers page to create, edit, and delete dialed numbers and associate them with other resources such as Agent Desktops or Labels. To open the page, from the Web Administration menu, select System Manager > *Resource Folder* > New ▼ > Resource Item > Dialed Number.

Note It is not currently possible to associated Dialed Numbers with Call Types in Unified CCMP.

What is a Dialed Number?

A dialed number (DN) is the number a caller dials to initiate a call. It is sent as part of the call detail information in the route request message sent from the routing client. In Unified CCE/ Unified CCH, you set up a Dialed Number List, which identifies all of the phone numbers in your contact center that customers can dial to initiate contact. The Dialed Number plays an integral role in routing calls. Dialed Numbers are required pieces of call types, which are used to identify the appropriate routing script for each call. In addition to answered calls, Dialed Numbers also need to be set up for ring on no answer, dialed number plan entries, and for supervisor/emergency calls.

How to Create a Dialed Number

To create a dialed number:

1. On the Items panel, click New > Dialed Number.
2. Enter unique name of up to 24 characters for the Dialed Number. This must consist of alphanumeric characters, periods, and underscores only.
3. Complete fields as described in the Dialed Number Fields table below.
4. Click **Add** to specify the call types and other dialing information to be associated with this dialed number.

Note The order of the entries in the Dialed Number mapping table reflects the order in which call types are processed for the Dialed Number.

5. Click **Save**.

How to Delete a Dialed Number

To delete one or more dialed numbers:

1. On the Items panel, select the Dialed Number record(s) you want to delete/

Note You cannot delete a Dialed Number that is referenced in a script. This reference must be removed before the Dialed Number can be deleted.

2. Click **Delete**.

3. A message prompts you to confirm the deletion. Click **OK**.

Dialed Number Fields

Field	Description	Entry	Default	Required?
<i>Details Tab</i>				
Name	A unique name for the record.	Unique. Up to 24 characters, alphanumeric, period, and underscore characters only. Must begin with alphanumeric.	Null	Yes
Description	A description of the record.	Up to 255 characters	Null	No
Dialed Number	For voice MRD only, the string value by which the Agent/IVR Controller identifies this Dialed Number. This must be the value the Agent/IVR Controller uses for calls to this number. For example: 8005551212	Up to 32 characters	Null	Yes
Routing Client	The routing client (such as NIC or PG) that this number should use to submit routing requests to the ICM	Drop-down list		Yes
Media Routing Domain	The media routing domain associated with this dialed number	0-99999999	Null	Yes
Permit Application Routing	Whether this dialed number can be routed remotely by a CTI client	Checkbox	Unchecked	No
Outbound	Whether this dialed number should use an outbound Routing Client	Checkbox	Unchecked	No

<i>Agent Desktops Tab</i>				
Agent Desktops	The Agent Desktops associated with this Dialed Number.	Select from list and click Add .	Null	No
<i>Agent Teams Tab</i>				
Agent Teams	The Agent Teams associated with this Dialed Number.	Select from list and click Add .	Null	No
<i>* Labels Tab</i>				
Labels	The Labels associated with this Dialed Number.	Select from list and click Add .	Null	No
<i>Call Type Tab</i>				
Call Line ID	Required for Dialed Numbers mapped to voice media routing domains.	Select from the list	All	Yes
Call Entered Digits	Required for Dialed Numbers mapped to voice media routing domains.	Select from the list	All	Yes
App String 1	Required for Dialed Numbers mapped to non-voice media routing domains	Select from the list	All	Yes
App String 2	Required for Dialed Numbers mapped to non-voice media routing domains.	Select from the list	All	Yes
<i>Advanced Tab</i>				
Active From Date	The date from which the Dialed Number will be active in the system.	Select from calendar.	Current date	Yes
Active To Date	The date after which the Dialed Number should be deleted from the system.	Uncheck Forever then select from calendar.	Forever	No

Manage Call Types

Page Access and Use

Use the Call Types page to create, edit, and delete call types. To open the page, from the Web Administration menu, select **System Manager > Resource Folder > New ▼> Resource Item > Call Type**.

What is a Call Type?

A call type is a category of incoming routable task. Specific call types are associated in Unified CCE/ Unified CCH with Dialed Numbers. In this association, each call type has a schedule that determines which routing script or scripts are active for that call type at any time.

Note It is not currently possible to associate Dialed Numbers with Call Types in the Management Portal.

There are two classes of call type/dialed number associations:

- **Voice:** Voice call type/dialed number combinations such as phone calls are categorized by the dialed number (DN), caller-entered digits (CED), and calling line ID (CLID). The CED and CLID can be optional, depending on the call.
- **Non-voice:** Non-voice type/dialed number combinations (such as e-mail and text chat) are categorized by the Script Type Selector, Application String 1, and Application String 2. Application String 1 and Application String 2 can be optional, depending on the application.

Because the call type determines which routing script is run for a call, the call type defines call treatment in a Unified CCE system. Therefore, the call type is the highest level reporting entity. Reporting on call type activity provides insight into end-to-end customer interactions with the system and with agents by providing data such as service level adherence, transfers, average speed of answer, calls handled, and calls abandoned.

In routing scripts you can change the call type at specific points in the script to indicate that a transaction has been completed. For example, if the customer is calling a bank and successfully checks his or her account balance using a Self-Service script, you may want to change the call type to indicate that the account balance transaction has completed and a new transaction has begun. You can also change call type in a script to invoke a new routing script associated with that call type. For example, if a call is not answered at an agent's desktop, you can change the call type in the script to redirect the call to a different script designed for Redirection on No Answer. The Redirection on No Answer script assigns a different agent to handle the call.

How to Create a Call Type

To create a call type:

1. On the Items Panel, click **New > Resource Item > Call Type**.
2. Enter a unique name of up to 24 characters for the call type. This can contain alphanumeric characters, periods, and underscores only.
3. Complete fields as described in the Call Type Fields table below.
4. Click **Save**.

Task Result

Once you have created a call type you can reference it in a dialed number configuration through Unified CCE/ Unified CCH.

How to Delete a Call Type

To delete one or more call types:

1. On the Items Panel, select the call type record(s) you want to delete
Note You cannot delete the default call type
2. Click **Delete**.
3. A message prompts you to confirm the deletion. Click **OK**.

Note Deleting a call type automatically removes it from any dialed number mappings in which it is referenced.

Call Type Fields

Field	Description	Entry	Default	Required?
<i>Details Tab</i>				
Name	A unique name for the record.	Unique. Up to 24 characters, alphanumeric, period, and underscore characters only. Must begin with alphanumeric.	Null	Yes
Description	An internal description of the record.	Up to 255 characters.	Null	No
Service level threshold	Optionally, use to indicate whether this call type will use a service level threshold other than the system default.	Select from Use global setting, None, and Use specified. For Use specified, you must also enter a number in seconds from 0-99999	Use global setting	No
Service level type	Optionally, use to indicate how abandoned calls should be factored in calculating service levels.	Select from Use global setting, Ignore Abandoned Calls, Abandoned Calls Have Negative Impact, and Abandoned Calls Have Positive Impact.	Use global setting	No

Field	Description	Entry	Default	Required?
Bucket Interval	Use to indicate how the call type data should be stored for reporting purposes. The bucket interval chosen determines what time intervals are used for grouping calls of that type.	Select from drop-down	Null	No
<i>Advanced Tab</i>				
Enterprise Name	The name that will represent the Call Type within the network.	Unique. Up to 24 characters, alphanumeric, period, and underscore characters only. Must begin with alphanumeric.	From Name	Yes
Active From Date	The date from which this Call Type should be active within the system	Select from calendar	Current date	Yes
Active To Date	The date after which this Call Type should be deleted from the system	Uncheck Forever box and select from calendar	Forever	No

Manage Labels

Page Access and Use

Use the Labels page to create, edit, and delete labels. To open the page, from the Web Administration menu, select System Manager > Resource Folder > New ▼ > Resource Item > Label.

What is a Label?

In Unified CCE/ Unified CCH the label represents a string that is passed to a routing client for each network target. Unified CCMP will automatically create labels for many high level operations but the functionality is included for specific label creation such as blind transfers. The only label type supported will be type Normal, the only network target is device target.

How to Create a Label

To create a label:

1. On the Items panel, click New > Resource Items > Label.
2. Enter a unique name of up to 24 characters for the label. This must contain alphanumeric characters, periods and underscores only.
3. Complete fields as described in the Label Fields table below.
4. Click **OK**.

How to Delete a Label

To delete one or more labels:

1. On the Items panel, select the label record(s) you want to delete. Click **Delete**.
2. A message prompts you to confirm the deletion. Click **OK**.

Label Fields

Field	Description	Entry	Default	Required?
<i>Details Tab</i>				
Name	A unique name for the record.	Unique. Up to 24 characters, alphanumeric, period, and underscore characters only. Must begin with alphanumeric.	Null	Yes
Description	A description of the record.	Up to 255 characters.	Null	No
Routing Client	The enterprise name of the routing client associated with this label	Select from the supplied list of routing clients that the logged in user has the security privileges to see.	Null	Yes
<i>Dialed Numbers Tab</i>				
Dialed Numbers	The Dialed Numbers to associate with this label	Select from list and click Add .	Null	No
<i>Advanced Tab</i>				
Active From Date	The date from which	Select from calendar	Current date	Yes

Field	Description	Entry	Default	Required?
	this label should be active within the system			
Active To Date	The date after which this label should be deleted from the system	Uncheck Forever box and select from calendar	Forever	No

Equipment Management

Manage IP Phones

Page Access and Use

Use the IP phones page to create, edit, and delete telephones. To open the page, from the Web Administration menu, select System Manager > *Resource Folder* > New ▼ > Resource Item > IP Phone.

Using Portal with Other Provisioning Systems

When using a separate provisioning system to add IP phones to a Unified Communications Manager, check the Contact Center enabled checkbox for all the Directory Numbers provisioned by the external system to ensure that they are added correctly to the Unified CCE/ Unified CCH. Do not attempt to make any other changes to phones on that Unified Communications Manager using Portal.

What is an IP Phone?

A telephone is the IP device that the contact center agent uses to make or receive calls. The telephone has a single line (typically line 1 if using a Cisco multi-line phone), whose number is known to the call routing software. The agent logs into the contact center using the Cisco CTI OS client desktop using the login name and password allocated by the Manage Agent portal page and the line number allocated in this page.

How to Create an IP Phone

To create an IP Phone:

1. On the Items panel, click New > Resource Items > IP Phone.
2. Select the phone type from the drop down.
3. Complete fields as described in the IP Phone Fields table below.
4. Optionally add directory numbers by checking the boxes of numbers to add and clicking **Add**.
5. Click **Save**.

Once you have created an IP phone its status will initially be shown as Not Ready. The telephone will not be ready to use until this status changes to Available. This change usually occurs within a few minutes of saving.

How to Delete an IP Phone

To delete one or more telephones:

1. On the Items panel, select the telephone record(s) you want to delete.
2. Click **Delete**.
3. A message prompts you to confirm the deletion. Click **OK**.

IP Phone Fields

Field	Description	Entry	Default	Required?
<i>Details Tab</i>				
Name	A unique name for the record.	Unique. Up to 24 characters, alphanumeric, period, and underscore characters only. Must begin with alphanumeric.	Null	Yes
Description	An internal description of the record.	Up to 255 characters.	Null	No
Type	The model of telephone.	Select from list.	Null	Yes
Template / Change Template	The XML template to be used to configure the IP Phone on the Unified Communications Manager.	Select from list of templates available for the specific phone model. When editing an IP Phone, you must check Change Template to show the Template field.	Null	Yes
Button Template	The configuration to use for the buttons on the Unified Communications Manager	Select from list of button templates set up for the Unified Communications Manager.	Null	Yes

Field	Description	Entry	Default	Required?
MAC Address	The MAC Address of the IP phone used to uniquely identify it.	12-digit hexadecimal number.	Null	Yes
<i>Directory Numbers Tab</i>				
Directory Numbers	The lines to be associated with the IP Phone.	Select from list.	Null	No
Index	The port on the IP Phone that the line is plugged into.	Number.	Null	No
<i>Advanced Tab</i>				
Unified Communications Manager	The Unified Communications Manager to be associated with the IP Phone.	Select from the list of Unified Communications Manager available for the tenant.	Default Unified Communications Manager	Yes
Extension Mobility	Enables the Extension Mobility Service on the phone allowing a user access via their associated device profile	Checkbox	False	No
Peripheral	The Peripheral to be associated with the IP Phone.	Select from the list of Peripherals associated with the selected Unified Communications Manager.	Default Peripheral	Yes
Device Pool	A pool of phones that have similar character.	Select from the list of Device Pools available to the logged in user.	Default Device Pool	No
Active From Date	The date from which the IP Phone will be active in the system.	Select from calendar.	Current date	Yes

Field	Description	Entry	Default	Required?
Active To Date	The date after which the IP Phone should be deleted from the system.	Uncheck Forever and select from calendar.	Forever	No

Advanced Information

The Web Portal automatically links or adds default additional information to Unified CCE/ Unified CCH as follows:

- Links the Unified Communications Manager *calling search space* from the tenant owning folder
- Links the Unified Communications Manager *route partition* from the tenant owning folder
- Links the Unified Communications Manager *owner user ID* from the PG user id allocated to the tenant
- Links the Unified Communications Manager *location* from the parent folder
- Creates an Unified CCE/ Unified CCH *device target* for the phone/line.
- Creates an Unified CCE/ Unified CCH *label* for each combination of *device target* and routing client (to route calls to an Unified CCE/ Unified CCH agent, you must have defined a *label* associated with the *device target*).

Manage Directory Numbers

Page Access and Use

Use the Directory Numbers page to create, edit, and delete numbers. To open the page, from the Tools page, select System Manager > Resource Folder > New ▼ > Resource Item > Directory Number.

What is a Directory Number?

A directory number is an extension line which is attached to an IP Phone.

How to Create a Directory Number

To create a Directory Number:

1. On the Items panel, click New > Resource Items > Directory Number.
2. Select whether the number is **Contact Center Enabled**.
3. Complete fields as described in the Directory Number Fields table below.
4. Click **Save**.

How to Delete a Directory Number

To delete one or more numbers:

1. On the Items panel, select the number record(s) you want to delete.

2. Click **Delete**.
3. A message prompts you to confirm the deletion. Click **OK**.

Directory Number Fields

Field	Description	Entry	Default	Required?
<i>Details Tab</i>				
Name	A unique name for the record.	Unique. Up to 24 characters, alphanumeric, period, and underscore characters only. Must begin with alphanumeric.	Null	Yes
Description	An internal description of the record.	Up to 255 characters.	Null	No
Contact Center Enabled	Determines whether a Device Target must be created on the Unified CCE/ Unified CCH for this number. This must be checked for any phones added using a different provisioning system.	Checkbox	Unchecked	No
<i>Advanced Tab</i>				
Unified Communications Manager	The Unified Communications Manager to be associated with the Directory Number.	Select from the list of Unified Communications Manager available for the tenant.	Default Unified CM	Yes
Route Partition	The group of numbers (such as area codes or internal numbers) that this number is to be associated with.	Select from list.	Default Peripheral	Yes

Field	Description	Entry	Default	Required?
Automatically Allocate a Number Pattern/ Number Pattern	Whether to automatically allocate the number to be used for this Directory Number.	Checkbox. Uncheck box to enter number of 1-20 digits manually in the Number Pattern text box that appears.	Checked	Yes
Active From Date	The date from which the Directory Number will be active in the system.	Select from calendar.	Current date	Yes
Active To Date	The date after which the Directory Number should be deleted from the system.	Select from calendar.	Forever	No

Manage Device Profiles

Page Access and Use

Use the Device Profile page to create, edit, and delete Device Profiles. To open the page, from the Web Administration menu, select System Manager > *Resource Folder* > New ▼ > Resource Item > Device Profile.

What is a Device Profile?

A device profile is the profile of an IP device that the contact center agent uses when they logon to a specific phone. It allows a specific set-up and line associations to persist for a given user regardless of the phone to which they login on.

How to Create a Device Profile

To create a Device Profile:

1. On the Items panel, click New > Resource Items > Device Profile.
2. Select the device profile type from the drop down.
3. Complete fields as described in the Device Profile Fields table below.
4. Optionally add directory numbers by checking the boxes of numbers to add and clicking **Add**.
5. Optionally add users by checking the boxes of numbers to add and clicking **Add**.
6. Click **Save**.

Once you have created a device profile its status will initially be shown as Not Ready. The telephone will not be ready to use until this status changes to Available. This change usually occurs within a few minutes of saving.

How to Delete a Device Profile

To delete one or more device profiles:

1. On the Items panel, select the device profile record(s) you want to delete.
2. Click **Delete**.
3. A message prompts you to confirm the deletion. Click **OK**.

Device Profile Fields

Field	Description	Entry	Default	Required?
<i>Details Tab</i>				
Name	A unique name for the record.	Unique. Up to 24 characters, alphanumeric, period, and underscore characters only. Must begin with alphanumeric.	Null	Yes
Description	An internal description of the record.	Up to 255 characters.	Null	No
Type	The model of telephone to which the profile is associated.	Select from list.	Null	Yes
Template / Change Template	The XML template to be used to configure the Device Profile on the Unified Communications Manager.	Select from list of templates available for the specific phone model. When editing a device profile, you must check Change Template to show the Template field.	Null	Yes
Button Template	The configuration to use for the buttons on the Unified Communications Manager	Select from list of button templates set up for the Unified Communications Manager.	Null	Yes

Field	Description	Entry	Default	Required?
<i>Directory Numbers Tab</i>				
Directory Numbers	The lines to be associated with the IP Phone.	Select from list.	Null	No
Index	The port on the IP Phone that the line is plugged into.	Number.	Null	No
<i>Users Tab</i>				
Users	The associated Unified Communications Manager users that may use this profile	Select from list.	Null	No
<i>Advanced Tab</i>				
Unified Communications Manager	The Unified Communications Manager to be associated with the Device Profile.	Select from the list of Unified Communications Manager available for the tenant.	Default Unified Communications Manager	Yes
Peripheral	The Peripheral to be associated with the IP Phone.	Select from the list of Peripherals associated with the selected Unified Communications Manager.	Default Peripheral	Yes
Device Pool	A pool of phones that have similar character.	Select from the list of Device Pools available to the logged in user.	Default Device Pool	No
Active From Date	The date from which the IP Phone will be active in the system.	Select from calendar.	Current date	Yes
Active To Date	The date after which the IP Phone should be deleted from the system.	Uncheck Forever and select from calendar.	Forever	No

Audio Management

Manage VRU Scripts

Page Access and Use

Unified CCMP allows you to change the audio file associated with a network VRU script.

Note You cannot create a new VRU Script through the Management Portal.

To open the page, from the System Manager, navigate to the correct folder in the left-hand panel, choose Network VRU Script from the summary list of items, and select a specific VRU Script from the list shown in the Items panel. This will show you the details of the script.

What is a Network VRU Script?

A Network VRU (voice response unit) is a telecommunications computer, also called an Interactive Voice Response (IVR) unit, that responds to caller-entered touch-tone digits. This uses routing scripts to process a call. At various stages, this may run a VRU script to play a message to the caller, such as a repeated announcement when they are in a call queue.

How to Associate a VRU Script with an Audio File

To change the audio file associated with a VRU script:

1. On the **Items** panel, click on a VRU script to associate with an audio file. The details for this script will open in the right-hand Details panel
2. Select the **Audio** tab.

Note If no Audio tab is available, this may mean that the Network VRU Script has not been configured correctly. Contact your system administrator.

3. Click **Save**.

Note The audio file will be saved under the name configured in the VRU script, replacing any previous audio file.

Code and Variable Management

Manage User Variables

Page Access and Use

Use the Create a New User Variable page to create and delete user variables. User variables cannot be edited once created. To open the page, from the Web Administration menu, select **System Manager > Resource Folder > New ▼ > Resource Item > User Variable**.

What is a User Variable?

A user variable is a named object which can hold a value up to 40 characters long. Variables are used in routing scripts.

How to Create a User Variable

To create a user variable:

1. On the **Items** panel, click New ▼ > Resource Item > User Variable.
2. Complete fields as described in the User Variable Fields table below. Active from and to dates can be set in the **Advanced** tab.

Note Unified CCE/ Unified CCH requires that all user variable names begin with the string 'user'. The **Code Text** will therefore automatically be prefixed with this string on saving. For example, if you enter a **Code Text** of 'Temp', the resulting user variable will be called 'userTemp'.

3. Click **Save**.

Note User variables cannot be edited after creation.

How to Bulk Create User Variables

In addition to creating user variables one at a time, you can also bulk load user variable records previously output to a CSV (comma separated values) file. See the Bulk Upload section for further information.

How to Delete a User Variable

To delete one or more user variables:

1. In the Items panel, select the user variable(s) you want to delete.
2. Click **Delete**.
3. A message prompts you to confirm the deletion. Click **OK**.

User Variable Fields

Field	Description	Entry	Default	Required?
<i>Details Tab</i>				
Code Text	The name of the user variable.	Up to 32 characters, consisting of letters, numbers, periods and underscores only. This does not need to begin with the string 'user'.	Null	Yes
Object Type	The type of object with which to associate the variable. You may choose not to associate the user variable with an object by selecting	Select from list	Null	Yes

Field	Description	Entry	Default	Required?
	User Variable.			
Data Type	The data type for the variable.	Select from list	Long	Yes
Persistent	Whether the user variable retains value across Central Controller restarts.	Checkbox.	Checked	No
Description	A description of the variable and how it should be used.	Up to 255 characters.	Null	No
<i>Advanced Tab</i>				
Active From Date	The date from which the variable will be active in the system.	Select from calendar.	Current date	No
Active To Date	The date after which the variable should be deleted from the system.	Uncheck Forever and select from calendar.	Forever	No

Manage Expanded Call Variables

Page Access and Use

Use the Create an Expanded Call Variable page to create and delete expanded call (ECC) variables. To open the page, from the Tools page, select **System Manager > Resource Folder > New ▼ > Resource Item > Expanded Call Variable**.

What is an Expanded Call Variable?

An expanded call variable is a named object which is used by a VRU script to exchange call information with Unified CCE/ Unified CCH.

How to Create an Expanded Call Variable

To create an expanded call variable:

1. On the **Items** panel, click **New ▼ > Resource Item > Expanded Call Variable**.
2. Complete fields as described in the Expanded Call Variable Fields table below. Active from and to dates can be set in the Advanced tab.
3. Click **Save**.

How to Delete an Expanded Call Variable

To delete one or more expanded call variables:

1. In the Items panel, select the expanded call variable(s) you want to delete.
2. Click **Delete**.
3. A message prompts you to confirm the deletion. Click **OK**.

Expanded Call Variable Fields

Field	Description	Entry	Default	Required?
<i>Details Tab</i>				
Name	The name of the call variable	Unique. Up to 24 characters, letters, numbers, and underscore characters only. Must begin with letter or number.	Null	Yes
Description	The description of the call variable	Up to 255 characters	Null	No
Maximum Length	The maximum length of the value of the call variable	Up to 210	Null	Yes
Provided by Cisco	Whether the call variable provided by Cisco. This is normally determined by the system	Checkbox	Unchecked	No
Persistent	Whether the variable is written to the historical database with the TCD/RCD record	Checkbox	Unchecked	No

Field	Description	Entry	Default	Required?
Enabled	Whether the call variable is currently enabled	Checkbox	Checked	No
ECC Array	Whether the variable is an array	Checkbox	Unchecked	No
Maximum Array Size	The maximum size of elements in the array represented by the call variable	Up to 255. The equation $\langle \text{Maximum Length} \rangle * \langle \text{Maximum Array Size} \rangle + \langle \text{Maximum Array Size} \rangle + 5$ must not exceed 299. For example, if the Maximum Length was 97, the array size could not exceed 3.	Null	If ECC Array checked
<i>Advanced Tab</i>				
Enterprise Name	The name to be used for the expanded call variable within the system	Unique. Up to 24 characters, letters, numbers, and underscore characters only. Must begin with letter or number.	Created from variable name. Enterprise names for expanded call variables are automatically prefixed with 'user' by the system.	No
Active From Date	The date from which the variable will be active in the system.	Select from calendar.	Current date	No

Field	Description	Entry	Default	Required?
Active To Date	The date after which the variable should be deleted from the system.	Uncheck Forever and select from calendar.	Forever	No

Security Management

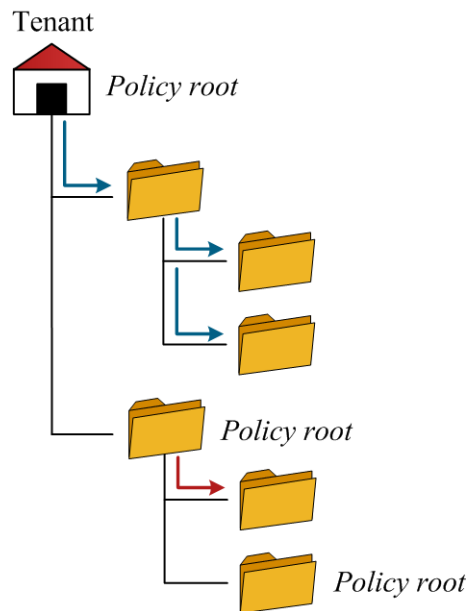
Overview

Security management in Unified CCMP is folder based, and therefore a basic folder structure needs to be in place before security can be set up. Users are granted permissions to perform certain tasks within specified folders, and these permissions are inherited by the child folders and on down through the folder tree.

Inheritance and Policy Root Folders

By default, all folders except the tenant folder inherit the permissions of their parent. The tenant folder is therefore considered the root folder for a single security policy.

This inheritance link can be broken for individual folders, allowing separate permissions to be applied to them. These folders become policy roots, with their child folders inheriting their permissions.



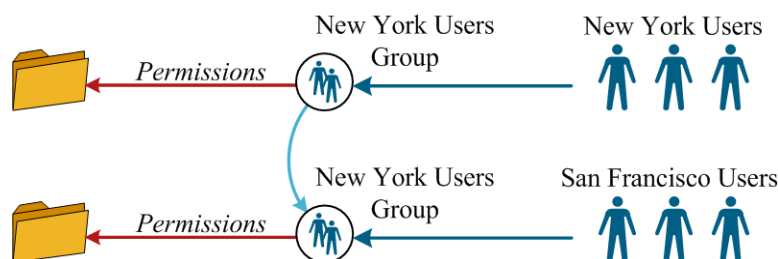
Note When changing a user's permissions on a folder, checking the Change permissions for sub-folders box forces the system to propagate the changes into any policy roots below it in the tree.

Users and Groups

Users can belong to groups of users that have the same permissions. The permissions assigned to that group apply to all members of that group.

Groups may be members of other groups. For example, if you wanted users with permissions over the San Francisco policy root to have permissions only within the San Francisco tree, but users with permissions

within the New York policy root to have permissions within both New York and San Francisco, you could create a group for each policy which had permissions only within that policy, and then make the New York group a member of the San Francisco group.



Both users and groups may be members of more than one group.

Users and groups are created, moved, edited and deleted from the **User Manager** and the **Group Manager** links on the **Tools** page. To assign permissions to a user or group use the **Security Manager**.

Default Groups

Creating a policy root automatically creates a number of default groups within the policy root folder, with permissions over that policy. The groups that are created, and the permissions they are assigned, can be set from the **System Settings** page.

Two default groups are also present in the Root folder. These are:

- Everyone** Allows users to browse the Shared and Unallocated folders, and to which users are automatically assigned on creation
- Administrators** Provides the host administrator with full permissions throughout the system

These groups cannot be edited, although users and groups may be assigned to them or removed from them as normal.

Permissions

Individual permissions (or tasks), such as creating agents or viewing resources, are gathered together into roles. Permissions for users and groups are then granted by means of these roles. There are two kinds of role that must be used to grant permissions:

- Global roles** globally ‘switch on’ the ability to perform certain kinds of action within the system, such as the ability to access the Security Manager tool
- Folder roles** specify the tasks which may be performed within individual folders, for example the ability to manage security within a specific tenant folder

For example, a user would need to have both a global role granting security management permissions, and a folder role granting permission to manage security within a particular folder, in order to manage security for that folder.

Global roles are created, edited and assigned to users and groups from the **Global Security Manager** link on the **Tools** page. Folder roles are created and edited from the **Role Manager** link on the **Tools** page. To assign folder roles to users or groups, use the **Security Manager**.

Default Roles

A number of default roles are provided with the system. These roles are shown below.

Default global roles:

- Global Advanced** – Contains tasks for advanced users allowing them to provision all items and access all tools
- Global Basic** – Contains tasks to perform basic report and provisioning for agents/ teams and skill groups
- Global Host** - All functions

Default folder roles:

- Advanced** – provides advanced functions on a given folder such as provisioning of item types, folder creation and security management
- Basic** – provides standard basic functionality e.g. reporting, team management and re-skilling
- Full Permissions** - All functions
- My Reports** – provides report access at a specified location
- Supervisor** – allows manage dimension and user permissions

Creating and Managing Global Roles

Global roles are collections of tasks that specify the permissions a user has the potential to perform within the system. For example, a user assigned a global role that includes the 'System Manager' task has the potential to access the System Manager tool if they are assigned folder roles that require this. Global roles are not contained within individual folders, but exist throughout the system and can be applied to any user or group.

Global Security can normally only be managed by Host Administrators, but it is possible to allow tenant administrators to grant users and groups global permissions without assigning them full global security permissions by setting up 'global permissions groups' in each tenant root, each of which has been uniquely assigned a particular global role.

Global roles can be managed from the **Global Security Manager** link on the Tools page.

Managing Global Roles

The roles that are needed in Unified CCMP are determined by the requirements of the different categories of user who will be working within that system.

To create a global role:

1. In the Global Security Manager, click the New option.
2. Give the new role a **Name** reflecting the permissions it grants or the category of user it is intended for.
3. Add a **Description** if necessary, such as a summary of the permissions granted.
4. Check the tasks to be included in this role.
5. **Save.**

To grant or remove global permissions

1. In the **Global Security Manager**, click on the name of the global role to be granted to users or groups. Its properties will be displayed
2. Click on the **Members** tab

From here, you can click on the cross by any member to remove that member. To add members:

1. Click the **Add Members** button. A pop-up will open
2. Navigate through the folder tree on the left to the folder containing the users or groups to be assigned this global role. You can use the fields at the top to filter this view to show only users or only groups, or to search for specific names
3. Check the checkbox of the new members. You may select users and groups from multiple folders
4. **Close** and **Save**

To edit a global role, click on its name and change its details, or add and remove tasks and members, as desired.

To delete a global role, check its checkbox, click **Delete**, and confirm.

Note You will not be able to delete a global role that still has members.

Creating and Managing Folder Roles

Folder roles are sets of permissions that users and groups may be granted on specific folders. They are not contained within individual folders, but exist throughout the system and can be applied to any user or group for any folder.

Folder roles can be managed from the Role Manager link on the Tools page. To grant users roles on specific folders, use the Security Manager.

Managing Folder Roles

The roles that are needed in Unified CCMP are determined by the requirements of the different categories of user who will be working within that system. For each folder role created there should be a global role which provides all the global permissions necessary to allow performance of the tasks specified. A global role that provides more

permissions than those required can normally be safely used for this purpose if necessary.

For example, if a folder role exists that contains the task 'Manage Dimensions', there should also be a global role containing the 'System Manager' task along with one or more of the 'Provision Agent', 'Provision AgentDesktop' etc tasks, depending on which dimensions the folder role is intended to allow users to manage.

Note By default, only host administrators can manage roles.

To create a folder role

1. In the **Role Manager**, click the **New** option.
2. Give the new role a **Name** reflecting the permissions it grants or the category of user it is intended for.
3. Add a **Description** if necessary, such as a summary of the permissions granted or a notation of which global roles are suitable for use with this folder role.
4. Check the tasks to be included in this role.
5. **Save.**

To edit a folder role, click on its name and change its details, or add and remove tasks as desired.

To delete a folder role, check its checkbox, click **Delete**, and confirm.

Note You will not be able to delete a folder role that is being used.

Creating and Managing Users

The **User Manager** link on the **Tools** page allows you to create, edit and delete users, or add them to groups. To grant users permissions on specific folders, use the **Security Manager**.

Creating a User

Unified CCMP treats user accounts similarly to resources. That is, each user account must be contained within a specific folder, and users with appropriate permissions on that folder can change the user's properties (such as the password) or move or delete the account.

The folder that contains a user account has no effect on the permissions of that user.

To create a user

1. Open the **User Manager**.
2. From the folder tree on the left, select the folder in which to create the new user.
3. Click the **New** option. The **Create a new user** page will open.
4. Enter the following details:

In the **User Name** field enter the name for the new user account.
The user will use this name to login to Unified CCMP

In the **Password** field enter the password for the new user.

In the **Confirm Password** field re-enter the selected password.

In the **First Name** and **Last Name** fields enter the user's details.

In the **Email** field enter the email address (if any) of the new user.

In the **Description** field, optionally enter any explanatory text, such as a job title.

Enter the **User Home Folder** that the user will start in when they log in. If you leave this blank, it will automatically be set to the folder the user is created in. Note that basic users will be unable to navigate out of this folder.

5. Select any of the following checkboxes which are applicable:

The **Advanced** checkbox if the user is to be assigned global roles that allow them to access Advanced Mode tools such as the System Manager.

Note The number of advanced users should be limited as far as is practical.

The **Enabled** checkbox to ensure that the user is live in the system. If unchecked the new user account will be saved in the system, but the user will not be able to login.

The **User must change password at next Logon** checkbox to prompt the new user to change their password after their first login.

The **Password Never Expires** checkbox to assign the password to the new user indefinitely.

The **User cannot change password** checkbox to prevent the new user from changing their own password (it can still be changed by administrators).

If you wish to create more than one user, select the **Create Another** checkbox to remain on the **Create a new user page**.

6. Click **OK**.

Managing Users

To edit a user's details:

1. Open the **User Manager**.
2. From the folder tree on the left, select the folder containing the user to be moved.
3. Click on the user. A page showing the user details will open.
4. Edit details as desired. The user's password can be changed from the **Password** tab, and the user can be added or removed from groups using the **Groups** tab.

To move a user:

1. Open the **User Manager**.

2. From the folder tree on the left, select the folder containing the user to be moved.
3. Check the user's checkbox.
4. Click the **Move** option. The **Move a user** page will open.
5. Navigate to the folder you want to move the user to.
6. Click **Save**.

Alternatively, click on the user name and click the **Move** option from the user details page.

To delete a user:

1. Open the **User Manager**.
2. From the folder tree on the left, select the folder containing the user to be deleted.
3. Check the user's checkbox.
4. Click the **Delete** option and confirm.

User Permissions

To grant a user permissions on specific folders, use the **Security Manager**. For ease of maintenance, permissions should usually be assigned through group memberships.

To see a user's permissions:

1. Open the **User Manager**.
2. From the folder tree on the left, select the folder containing the user.
3. Click on the user. A page showing the user details will open.
4. Click on the **Access** option. The roles the user can perform on each folder are shown.

Note The Access option does not show whether these permissions have been assigned directly to the user or through group memberships

To change a user's group memberships - the **Groups** tab

1. Open **the User Manager**.
2. From the folder tree on the left, select the folder containing the user.
3. Click on the user. A page showing the user details will open.
4. Select the **Groups** tab.

From the **Groups** tab, you can remove the user from groups by clicking on the cross icon beside each group. You can also add the user to new groups, as follows:

1. Click the **Add to Group** button. A pop-up will open.
2. Navigate through the folder tree on the left to the folder containing the group the user is to be added to.
3. Check the checkbox of the group or groups. You may select groups from multiple folders.
4. **Close** and **Save**.

Creating and Managing Groups

The **Group Manager** link on the **Tools** page allows you to create, edit and delete groups and their memberships. To grant groups roles on specific folders, use **the Security Manager**.

Creating a Group

Unified CCMP treats groups similarly to resources. That is, each group must be contained within a specific folder, and users with appropriate permissions on that folder can change the group's properties.

The folder that contains a group has no effect on the permissions of that group.

To create a group:

Open the **Group Manager**

1. From the folder tree on the left, select the folder in which to create the new user
2. Click the **New** option. The **Create a new group** page will open
3. Enter the following details:

In the **Name** field enter the name for the new group. Groups in different folders may have the same name.

In the **Description** field enter a description for the group, such as a summary of its permissions or the categories of users it is intended for.

4. If you wish to create more than one group, select the **Create Another** checkbox to remain on the **Create a new group** page.
5. Click **OK**.

Managing a Group

To edit a group's details:

1. Open the **Group Manager**.
2. From the folder tree on the left, select the folder containing the user to be moved.
3. Click on the group. A page showing the group details will open.
Edit details as desired. Members of the group can be added or removed using the **Members** tab, and the group itself can be added to or removed from others using the **Groups** tab.

To move a group:

1. Open the **Group Manager**.
2. From the folder tree on the left, select the folder containing the group to be moved.
3. Check the group's checkbox.
4. Click the **Move** option. The **Move a group** page will open.

5. Navigate to the folder you want to move the group to.
6. Click **Save**.

Alternatively, click on the group name and click the **Move** option from the details page.

To delete a group:

1. Open **the Group Manager**.
2. From the folder tree on the left, select the folder containing the group to be deleted.
3. Check the group's checkbox.
4. Click the **Delete** option and confirm.

Group Permissions

To see a group's permissions:

1. Open the **Group Manager**.
2. From the folder tree on the left, select the folder containing the group.
3. Click on the group. A page showing the group details will open.
4. Click on the **Access** option. The roles that members of this group can perform on each folder are shown.

Note The **Access** option does not show whether these permissions have been assigned directly to the group or are 'inherited' through membership of other groups.

To change the members of a group - the **Members** tab:

1. Open the **Group Manager**.
2. From the folder tree on the left, select the folder containing the group.
3. Click on the group. A page showing the group details will open.
4. Select the **Members** tab.

From the **Members** tab, you can remove members by clicking on the cross icon beside their names, or add members as follows:

1. Click the **Add to Group** button. A pop-up will open.
2. Navigate through the folder tree on the left to the folder containing the users or groups to be added to the current group. You can use the fields at the top to filter this view to show only users or only groups, or to search for specific names.
3. Check the checkbox of the new members. You may select users and groups from multiple folders.
4. **Close** and **Save**.

To change the groups a group is member of - the **Groups** tab:

1. Open the **Group Manager**.
2. From the folder tree on the left, select the folder containing the group to be added to, or removed from, others.
3. Click on the group. A page showing the group details will open.

4. Select the **Groups** tab.

From the **Groups** tab, you can remove the group from groups it is a member of by clicking the cross icon beside each, or add it to groups as follows:

1. Click the **Add to Group** button. A pop-up will open.
2. Navigate through the folder tree on the left to the folder containing the group the current group is to be added to.
3. Check the checkbox of the group or groups. You may select groups from multiple folders.
4. **Close** and **Save**.

Assigning Folder Permissions

Folder permissions are assigned using the **Security Manager** link from the **Tools** page. From the **Security Manager** you can also edit folder roles, users and groups by clicking on the name of the item to be edited.

To see the permissions users and groups have on a particular folder, select that folder from the folder tree on the left. All the permissions users or groups have on the selected folder are shown in the **Permissions** tab.

To grant folder roles to users or groups:

1. From the tree on the left, select the folder containing the user or group.
2. Click on the **Users** or **Groups** tab depending on whether you are applying permissions to a user or to a group.
3. Check the users or groups to be granted permissions (you may assign permissions to both users and groups at the same time).
4. Click **Change Permissions**. A pop-up will open.
5. Select the folder that permissions are to be granted on. If the folder is a policy root, a list of available folder roles will be displayed; if it is not, you will need to click **Edit Item Security** to break the inheritance link. If you break the inheritance link, the permissions that currently exist on the folder from inheritance will be copied in.
6. Check the permissions to be applied (or uncheck the permissions to be removed).
7. Optionally check the **Change permissions for sub-folders** box to copy the changed permissions into all policy roots beneath the selected folder.
8. Click **Save**. You will be shown a summary of the permissions that will be changed.
9. **Confirm** to apply the new permissions.

Note In order to provision some items, users may need browse permissions on related items. For example, in order to modify Agent and/or Skill Group configuration, a user must be able to see the Peripheral that they belong to.

To change a folder's inheritance:

1. From the tree on the left, select the folder to be made a policy root.
2. In the **Permissions** tab, uncheck the **Inherit permissions from parent** checkbox (or check it to reapply inheritance).
3. Click **OK** to confirm. If you break the inheritance link, the permissions that currently exist on the folder from inheritance will be copied in. These can then be changed if necessary.

It is also possible to make a folder into a policy root by applying permissions to it, as described above.

Service Management

Configuring Service Management

The **Team Management** and **Agent ReSkilling** tools available through the Service Management section of Unified CCMP rely on the user accessing Unified CCMP, being associated to a related Unified ICM Person resource.

To manage a set of agents using these tools the user must be associated to the Unified ICM Person resource, which is associated to the Supervisor Agent resource whom is supervising the Agent Team containing the agents which are to be managed.

These tools obviously rely on Agent Teams being configured with their associated supervisors set-up correctly within Unified ICM. Once these logical groups of agents exist then the following steps should be performed to create a Unified CCMP user that can utilize these tools:

1. Log in to the Unified CCMP using an Administrator account
2. Open the **System Manager** tool and navigate to the folder containing the **Supervisor Agent**
3. Open the **Supervisor Agent** and choose the **Person** tab
4. Click the **Edit Person** button (Green Arrow)
5. Go to the **Portal** tab
6. Specify **User Name** and **Password** for the new Unified CCMP user
7. Select the **Tenant User** and **Supervisor** groups for default permissions
8. Click **Save** to create the Unified CCMP user



Note In the case that a User has already been created, there is no interface to allow this user to be associated to the Agent – a new User must be created. The default system administrator user may not be associated to an ICM Person resource. Agents, Teams and Skill Groups should be managed through the System Manager Tool.

Team Management

The **Agents** option allows supervisor agents to manage the agents in their agent teams.

Each Agent is associated with a Person, which represents an actual physical person who performs customer contact duties. A Person may be associated with more than one Agent. For example a person who alternates between two teams on different peripherals would need to be associated with two Agents, one on each peripheral.

To see an agent team, click on the **My Agent Team** drop-down box and select the team you wish to work with. A list of the agents in the team will be shown below the box.

The agent list shows each agent's name, their status within the system (such as Ready or Pending), and the date from which they have been active in the system (an **Active From Date** in the future indicates an agent who has not yet started work). There is also an agent details icon  that allows you to view and edit agent details, and a copy icon  that allows you to create a copy of an agent (for example, if you wish to add to your team a new agent who has exactly the same skills as an existing agent).

To view or edit an agent:

1. Select an agent team from the drop-down list.
2. Click on the agent icon. The **Edit the current Agent** page will open, showing you the agent's details.
3. Make any changes to the agent. Selecting a different tab (such as Supervisor or Agent Teams) will show a different set of fields. You can always go back to previous tabs.
Note You are unlikely to need to use the Advanced tab unless you are changing start or finish dates for an agent.
4. Click **Save** to save your changes or **Cancel** to leave the agent's details as they were before you started editing.

To set an agent's starting or leaving date:

1. Select an agent team from the drop-down list
2. Click on the agent icon for the agent you wish to edit. The **Edit the current Agent** page will open, showing you the agent's details
3. To set or change an agent's starting or finishing date, select the Advanced tab. You may either type in the date manually (it is in the format day/month/year) or:

Click on the calendar icon beside the **Active To Date** (finish date) or **Active From Date** (start date) field. A calendar popup will appear.

Make sure the month and year shown at the top are correct.

To change the month, click on the pairs of arrows to the left and right to scroll through the months until you find the one you want.

To change the year, click on the pairs of arrows to the left and right. Going right from December will take you to January of the next year, and vice versa.

Select the date.

4. Set the time on the selected date on which the agent is starting or finishing (for example, 17h 00m for someone leaving at the end of business hours).
5. Click **Save** to save your changes or **Cancel** to leave the agent's details as they were before you started.

To add a new agent:

Note All agents must be associated with a person. If a person record for the new agent does not already exist on the system, you can create one as part of adding a new agent.

1. Click the **New** menu option. The **Create a New Agent** page will be displayed.
2. Fill in the fields for each tab.
3. All the fields that you must fill in are marked with a red asterisk. These fields are on the Details tab. The **Save** button will not be enabled until all the required fields have been filled in.

On the Details tab:

1. Fill in the Agent's Name (such as BOates or Beth_Oates).
2. Give a description of the agent (such as a job title).
3. Select a Peripheral to create the agent on (if you are a supervisor agent, this should usually be the same peripheral that you use). You will not be asked to select a peripheral if there is only one peripheral available.
4. Choose whether to associate the agent with an existing Person, or to create a new one. A Person can have more than one agent identity if all those agents are created on different peripherals

Select an existing person from the drop-down list, or search for a specific person by typing a part of their name in the Search box. The new agent will use the details specified in that Person's Peripheral Login box to log on to their Agent Desk Setting.

To Create a New Person, enter the first name and last (or family) name for the person, and fill in the details they will use to login to the peripheral. The person will be automatically created and associated with the agent.

Note Multiple Agents may be associated with a single Person, if all Agents involved are on different peripherals.

On the Supervisor tab:

1. If the agent is to be a supervisor, check the Supervisor checkbox. If this box is checked, you will also need to set a domain account.
2. If the agent is a supervisor, they must be associated with a domain account (the account they will use to log into a computer on the contact center network). Type in part of the account name, click Find and then select the correct account.

Note You cannot set up a domain account from the Management Portal. Contact your IT department if you are uncertain of the domain account to use.

On the Agent Teams tab:

1. Select an agent team for the agent to belong to. Agents may only be a member of a single team, but a supervisor can

supervise multiple teams. Use the **Selected Path** drop-down to see agent teams in other folders.

2. Click the **Add** button to associate the team with this agent.
3. Check the **Member** box to make the agent a member of the team. Supervisors can supervise a team without being a member.
4. If the agent is a supervisor, they can supervise the team without being a member. Select a primary or secondary supervisory role for any team they are to supervise.

On the Skillgroups tab:

1. Select skillgroups for the agent to belong to. Use the **Selected Path** drop-down to change folders.
2. Click **Add** to add the agent to the selected skill groups.

On the Advanced Tab:

Note You will probably only edit these settings to set an agent's start or finish date

1. Enterprise Name is the name the agent is known as within the Management Portal.
 2. Agent Extension is the internal extension number for the agent.
 3. Agent Desktop allows you to specify the agent's desk settings (also called the Agent Desk Setting).
 4. Check State Trace if you wish to let the system track the agent's state, such as whether they are logged off or talking.
 5. Use the Active From Date box to set the agent's starting time and date (you may enter the date manually in day/month/year format, or select a date from the calendar).
 6. Use the Active To Date box to set the agent's leaving date.
4. Check the Create Another checkbox to create another agent whose settings are identical to this agent's except for their name and login details.
 5. Click **Save** to create the agent, or **Cancel** to cancel agent creation and return to your homepage.

To change an agent's team:

1. Select the agent team to which the agent belongs from the drop-down list.
2. Click on the agent details icon (not the copy icon beside it) for the agent you wish to edit. The **Edit the current Agent** page will open, showing you the agent's details.
3. Click on the **Agent Teams** tab. The agent's current team membership is shown.
4. Select the agent team and click on the **Remove** button.

5. You may optionally select a team from the list below and click on **Add** to add the agent to that team. You can add the agent either as a member of that team by checking the **Member** box, or as a primary or secondary supervisor if they are a supervisor agent.
6. Click **Save**.

Agent Reskilling

The **Skill groups** option allows you to view and edit agent skill groups.

To see a skill group, click on the **Skill group** drop-down box and select the skill group you wish to work with. A list of the agents associated with the skill group will be shown below the box. A complete list of all the agents who can be associated with the skill group (those who are on the same peripheral as the skill group) is shown below that.

The agent list shows each agent's name, their status (such as R for Ready or S for Synchronizing), and the date from which they are active in the system (an **Active From Date** in the future indicates an agent who has not yet started work). Clicking on the green arrow icon allows you to edit the agent.

To add an agent to a skill group:

1. Select a skill group for the agent or agents to belong to.
2. Select agents to belong to the skill group using the checkboxes. Use the **Selected Path** drop-down to see agents in other folders.
3. Click the **Add** button to associate the agents with this skill group.
4. Click **Save** to save your changes, or **Cancel** to leave the details as they were before you started.

To remove an agent from a skill group:

1. Select a skill group to remove an agent or agents from.
2. In the top list, select agents to remove from the skill group using the checkboxes.
3. Click the **Remove** button to remove the agents from this skill group.
4. Click **Save** to save your changes, or **Cancel** to leave the details as they were before you started.

Self-Skilling

Self-Skilling is accessible through the basic mode tools menu or via the advanced mode Service Manager tool. Self-Skilling allows a Management Portal user associated with a valid Unified CCE/ Unified CCH person to update the skill groups to which they are assigned.

Adding yourself to a Skill Group

- If your Person is mapped to more than one Agent, select which Agent you wish to re-skill using the list-box provided
- Browse to the folder where the skill groups are you wish to add yourself to

- Check the box next to the skill groups you wish to join
- Press the **Add** button and they should appear in the Selected Skill Groups list
- Press the **Save** button to commit the changes

Removing yourself from a Skill Group

- If your Person is mapped to more than one Agent, select which Agent you wish to re-skill using the list-box provided
- Check the box next to the skill group you wish to remove yourself from in the Selected Skill Groups list
- Press the **Remove** button and they should disappear from this list
- If you are the last person in any of these skill groups (and removing yourself would effectively leave this skill group unmanned), you will be a confirmation dialog box appear. Click the **Ok** button if you wish to continue or the **Cancel** button to abort
- Press the **Save** button to commit the changes

Glossary

A

Agent

Any contact center operative dealing with customers, usually by answering incoming phone calls. Each agent is associated with a peripheral and can be a member of one or more skill groups

Agent Desk Settings

Settings for a Unified CCE or Unified CCH agent's phone or PC screen. Agent desk settings can be associated with each Unified CCE/ Unified CCH agent or with a Unified CCE/ Unified CCH peripheral. Also called agent desktop

Agent Desktop

See Agent Desk Settings

Agent Team

Any organizational or functional grouping of agents. An agent team is generally served by the same peripheral and has a common business focus such as a specific aspect of technical support. Agents may belong to several teams and skill groups

Aggregate

The sum total of many similar elements or a summary of underlying values. It may also refer to the minimum or maximum

Alphanumeric

Consisting of both letters and numbers

Announcement

A verbal message played to the caller

Application log

A folder in the system that records details of events which have occurred in the system. The data recorded can be any data; this is determined by an appropriate system administrator

Ascending

Defines a list as either starting with the letter A or with the lowest number (compare with Descending)

Assignment

The granting of specific task permissions to a user. See Role/Task

Attribute

Attributes are features of the graphic user interface that can be customized, such as the company logo, screen colors or icons

Audit

A report that provides data regarding the operation of the platform itself

Automate

To define a procedure that is carried out electronically, and independent of manual intervention

B**Breadcrumb Trail**

The route by which the user arrived at the current help page. Each previous page in the 'trail' can be accessed by clicking the displayed link

Browser

See Web Browser

C**Cache**

Memory on the application server, which stores the information used to generate a report for up to one month in case the information is required again

Call Type

A category of routable task determined by dialed number (DN), caller-entered digits (CED) and calling line ID (CLID). Each call type has a schedule that determines which routing script or scripts are active for that call type at any time

Cell

See Field

Chart

A graphical means of displaying report data

Checkbox

A small box displayed next to an entity in the system. By selecting the checkbox, the associated entity is made accessible for editing, deleting and so on

Child

In folder terms a child folder is one that is contained within another folder, called the parent. A child inherits the security permissions of its parent folder. Note that a single folder may be both the child of one folder and the parent of another. See Parent

Cluster

A grouping of similar resources, such as individual dialed numbers

Column

In a table, a column is a vertical slice through the table rows. Each column consists of a certain kind of data, indicated by the column header, whose values appear in the fields beneath. See Field, Row

Comma Separated Variable (CSV)

A method of representing a spreadsheet using a text file. The values are separated by commas, and each record is ended by a line break. The column headers are contained in the first record

Create

To add an entity to the system, such as a new user, customer, resource or mapping

Credentials

See Permissions

CSV

See Comma Separated Variable

Customize

To change an entity in the system to suit a unique purpose. Also to change the system settings to suit an individual user's requirements

D**Data**

The information generated by a computer based system

Data Field

In analysis services, data fields provide the total values to be summarized in a report view

Data Mart

A server running the Microsoft SQL Server analysis services application, which stores in memory the online analytical processing (OLAP) cubes used in report analysis

Database

A catalog within the Microsoft SQL Server application that stores in memory the data used in reporting

Default

The value that will be used when no alternative value is supplied by the user

Delete

To remove an entity, parameter or mapping from the system

Descending

Defines a list as either starting with the letter Z or with the highest number (compare with Ascending)

Destination

Code describing the target for an outgoing call (dialed number)

Destination Number

The telephone number to which the call was routed by the network. See Label

Detail Field

See Total Field

Dialed Number

The telephone number dialed by the calling party

Dimension

A means of grouping and separating contact center data of a similar type in the SQL Server Analysis Services database. Also another term for a resource

Drill down/up

To navigate through trees or data. Drill down to view child folders or data in finer detail and drill up to view parent folders or summarized data values

Drillthrough

To use a field in one report to link to the same data item in another report

E

Edit

To change the properties of an entity in the system

Enable

To make an entity in the system either accessible or functional

Enterprise

Collective term describing all parts of a company serviced by a single call distribution system. This may include several contact centers served by different peripherals

Enterprise Service

Organizational grouping of agents within a company, perhaps spanning several contact centers and served by different peripherals, providing a specific customer service, such as technical support

Enterprise Skill Group

Organizational association of contact center agents within a company, perhaps spanning several contact centers and served by different peripherals. Agents in a skill group share common talents such as technical or language abilities, or skills in dealing with complaints

Error

An event on the platform that prevents it from operating as expected

Excel

The spreadsheet application provided by Microsoft corporation

Exception

A value which falls outside set parameters. Exceptions may be highlighted for ease of identification. See Threshold

Expiry

A date and time, configured in the system, at which point a defined process or piece of information is rendered invalid

Export

To save a report as a document type that can be published and distributed independently of the platform

Extensible Markup Language (XML)

A markup language used to create special-purpose markup languages. It facilitates the sharing of data across different systems, particularly systems connected via the Internet

Extension (filenames)

Different report format file names use a character extension that is unique to each format type

Extension (telephone)

Either a telephone number that is local to the switch or a telephone station served by a PBX (Private Branch Exchange)

F

Field

An area in a table in which data can be included. The value in a field represents the value from the data represented by that specific row that belongs in the context defined by the column. See also Row, Column

Filter

A means of choosing what data to view

Folder

A system folder that can be linked to other folders in the system in parent/child relationships (compare with Tenant Folder). See also Parent, Child

G

Generate

To run a report

Global role

A role that applies throughout the entire system

Graphical User Interface (GUI)

The front-end to the application that provides the user with the means to define and generate reports

Group

A collection of users who share the same security permissions

GUI

See Graphical User Interface

H

Header

The field in a report grid which describes the contents of the column beneath it or the row beside it

Hierarchy

A tree structure in which the root folder at the top of the tree is the parent folder to all the folders beneath it. Folders are organized into parent/child relationships in which the subordinate child folders inherit the security permissions of a parent folder. Tenant folders are unusual in being stand alone and unable to inherit the permissions of a parent folder

Historical

Historical data reflects the past activities occurring in the organization

HTML

See Hypertext Markup Language

Hypertext Markup Language (HTML)

A markup language used to build web pages and other information which can be viewed in a web browser

I**Icon**

A picture displayed in the GUI that represents a system function or object. Some icons may be purely representative. Other icons, however, may be used as shortcuts to the object or function they represent. For example, the Properties icon acts as a link to the properties page in which the properties of the selected object may be modified

IE

See Internet Explorer

Import

To load data into the platform from an external source

Increment

One of a series of regular additions. Specifically, the adding of a new version of a report to a list of previous versions

Information Notice

Information notices are used to inform contact center staff of general information or new announcements. Information notices are displayed in the homepage

Interactive Voice Response (IVR)

Also called VRU (Voice Response Unit) or ARU (Audio Response Unit). A device that routes a call automatically using a customer's replies to a series of prompted messages. An IVR may respond directly to a customer's voice or to a sequence of dialed digits (CED)

Interface

See Graphical User Interface

Internet Explorer

The web browser developed by Microsoft Corporation. Several versions are available, providing different levels of functionality

IP Phone

A telephone that can be integrated into an IP network

IVR

See Intelligent Voice Response

J

Job

A task performed by the system

L**Label**

An identifier, usually a destination number, that is associated with a specific peripheral target or with a specific network target used for call routing purposes

Layout

The way in which information is displayed

Legend

A quick means of identifying the different elements displayed in a report.

Link

The system enables you to access certain functions or pages by clicking certain text or buttons. Link text is usually distinguished from normal text by being underlined or bold

Linked Report

When a report's parameters (items) are changed and saved under a new report name, the new report is linked in the system back to the original report

List

A series of alphabetical or numerical objects or values

Log in

For a user to identify themselves to the Web Portal. No user can use the Web Portal without logging in. This is a security measure which ensures that each user may only use those data and functions to which they have been granted access. This process is also called logging on (compare Log out). See Login ID, Password

Log out

To leave the system, disabling access to functions and data. A user should log out once they have finished working with the system to prevent other individuals gaining access to functions and data they are not authorized to use (compare Log in)

Login ID

This is the same as the user name. Along with a password, it allows a user to log in to the system. See Log in, Password

M**Mapping**

The process of associating one item with another. For example, you might associate a user with a security group that has permission to access particular resources, or a security group with a resource group, or a dialed number with a destination number (label)

Member

A user who belongs to a user group

Message

A piece of useful or instructional text

N**Navigate**

To search through a hierarchical folder structure in the tree, or to follow a set of commands to access a page or function within the system

Notice

See Information Notice

O**Office Web Components (OWC)**

Tools based on Microsoft Excel technology, but used in the web browser rather than the desktop. They consist of the Spreadsheet, Chart, Pivot Table and Data Source components

Online

To be able to communicate across a network

OWC

See Office Web Components

P

Parameters

Settings that enable you to define the type and amount of information displayed in a report as well as the way in which the data is presented

Parent

A folder that contains one or more sub-folders (child folders). A parent folder sets the default security permissions of its child folders (compare with Child)

Password

A word or specific string of characters, usually consisting of letters and numbers, that is used by a given user to access an application. The word is known only to that user and acts as a security measure to ensure that each user can only access their own data and functions. See Log in, Login ID

PDF

See Portable Document Format

Peripheral

An individual device or switch providing routed customer phone calls to contact center staff. The term peripheral is also used to describe parts of a contact center Enterprise receiving calls from the device

Permissions

A security measure. The set of roles a user can perform on a specific folder or folders. See also Role

Pivot Table

An office web component that is similar to a spreadsheet, except that the row and column data values are summarized values of underlying data, which can be drilled down into to explore highly detailed report values

Portable Document Format (PDF)

A file format developed by Adobe systems that stores documents independent of the software or hardware used to create them. A PDF document will appear exactly the same regardless of the platform on which it is displayed

Prefix

A character added to a folder to specify where to place imported resources

Print

To make a paper copy of a document or report

Privilege

See Permissions

Properties

The qualities possessed by an object which define it

R

Radio button

Similar to a checkbox. A small circle displayed next to an entity in the system. By selecting the button the associated entity is made accessible for editing, deleting, and so on

Refresh

To upload the latest data in a browser window

Render

The process of creating a report in a specific format

Report

A view of information or data, which is summarized and displayed numerically in a pivot table or graphically in a chart

Resource

An entity or value in the data mart that represents an asset belonging to a customer, such as a dialed number, agent, call route, and so on. Resources are stored in folders. Also called dimensions

Rights

See Permissions

Role

A defined set of tasks that determine how users can interact with folders. See also Task

Routing Script

Routing scripts are programs that determine the best way of handling a call. Reports on script activity show which reports have been called, the nodes executed within the scripts and so on

Routing Table

A table that states which dialed number is directed to which destination number (label)

Row

In a table, a row is a horizontal line of cells spanning the columns. Each row supplies values from a certain set of data that relate to the context described by the column header. See also Column, Field

S

Scroll

To display a new area of text within the current document or web page. This is normally accomplished using scrollbars that appear at the side or bottom of the window and indicate the user's location within the text

Security

Any process which prevents the data held in the data mart from being viewed by unwanted users, while at the same time enabling permitted users to access the data they require

Security Group

A collection of users who are associated with particular resources and perform particular functions according to the permissions granted to the group by the applicable user, such as creating, deleting or viewing reports

Security Tree

A hierarchical tree in which security groups and their associated users are organized. In Unified CCMP all system resources, users and groups are stored in folders in the tree

Session

A single period during which a user is logged into the system

Settings

Functions that define the manner in which the user interacts with the system

Skill Group

An organizational association of contact center agents sharing common talents such as technical or language abilities, or skills in dealing with customer complaints. Skill groups are associated with a particular peripheral and allow the ICM to route calls to the most appropriate available agent. Several skill groups at different contact centers are served by different peripherals and may be collectively combined in an enterprise skill group

Spreadsheet

A document which displays data numerically in fields organized into rows and columns

State

An item's provisioning status. There are five states: Synchronise, Error, Ready, Delete Pending and Deleted.

Subset

A subset of data is a portion of the data that when calculated together creates a summarized value

Summary

A high level view of data; the sum of underlying data values

Supervisor

A person responsible for a team of agents. A supervisor can add and remove agents and view statistics for the team that they supervise. A supervisor may also be an agent. See also Agent Team

System Administrator

The highest level of user in the management system, who is responsible for creating more users and granting user permissions and access rights

T**Table**

A matrix consisting of fields, separated into rows and columns, which display values

Tagged Image File Format (TIFF)

A standard image file format. The TIFF format supports multiple images and data in the same file, images of multiple pages and other options

Task

An action that a user is allowed to perform. Tasks are collected together to create a Role

Team

See Group, Agent Team

Tenant Folder

A folder exclusive to a particular tenant. It is the same as a system folder except that a tenant folder does not and cannot inherit the security permissions of a parent folder and is a stand-alone entity (compare with Folder)

Threshold

A limit defined on the application server and applied to report data. Data values breaching the threshold are displayed in a manner that easily differentiates them from other data values

TIFF

See Tagged Image File Format

Toolbar

A list of links above the report view panel. These links are used to access the various functions and options available to the user

Total Field

Totals fields display a value which represents a total or summary of all of the available data selected for analysis

U**Uniform Resource Locator (URL)**

The global address of a document or site on the World Wide Web (such as www.cisco.com)

Uniform Resource Name (URN)

A means of identifying resources on the Internet. An URN is a unique and unchangeable name (compare with Uniform Resource Locator)

URL

See Uniform Resource Locator

User

An individual granted access to the application

User Group

Users who share the same role assignments (security permissions)

V**View**

How an item (such as a report) is displayed

Voice Response Unit (VRU)

A device capable of routing a call automatically using a customer's replies to a series of prompted messages. A VRU may respond directly to a customer's voice or to a sequence of dialed digits. Also called IVR (Interactive Voice Response Unit) or ARU (Audio Response Unit)

W**Web Archive**

A stand alone HTML file with the extension .mhtml, which contains report data in HTML code

Web Browser

An application that allows a user to access the World Wide Web or locally held web pages. Web browsers include a graphical interface that lets users interact with and navigate through web pages

Web Server

The web server obtains data directly from the data mart in response to user queries.

Wrap

A call state in which activities such as paperwork or consultations arising as a direct result of, and associated with, a customer call are completed. Also called Post-Call Processing (PCP) or After-Call Work (ACW). An agent is not available to take calls during wrap up activities

WYSIWYG

What You See Is What You Get. Typically used to describe a text editor that displays formatted text

X

XML

See Extensible Markup Language

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