Manage Agents

Agents

Agents respond to contacts from customers. These contact requests are often phone calls, but can also be chat requests or emails.

You can configure the types of contacts that are routed to an agent. For example, if an agent is a member of a skill group that is set up for the Cisco_Voice routing domain only, that agent is a voice agent for that skill group. If an agent is a member of a skill group that is set up for a nonvoice routing domain, that agent is a multichannel agent for that skill group.

Agents can be located at a contact center site or designated as mobile agents who work elsewhere—perhaps from a home office. Setting up mobile agents is documented in the *Cisco Packaged Contact Center Enterprise Features Guide* , at https://www.cisco.com/c/en/us/support/customer-collaboration/packaged-contact-center-enterprise/products-maintenance-guides-list.html.

Agents can be assigned to skill groups and to one team. Teams are organizational units that reflect the reporting structure in a contact center. They can also be assigned attributes that indicate their proficiency—perhaps expertise in a certain language or technology.

Agents work from an agent desktop. Each agent is associated with one Desk Settings, either the current default desk settings or another desk settings. Desk settings are a set of permissions or characteristics that control the features agents can see and use while they are interacting with customers.

You can indicate that an agent is a supervisor. An agent with supervisor status can oversee multiple teams, can view reports that monitor activities of the agents on those teams, and can join and participate in agent/customer calls. Supervisors work from a supervisor desktop.

Navigate to **Unified CCE Administration** > **Manage** > **Agents** to view the Agent list. Based on their role and the departments they administer, Administrators can see and maintain all agents. Supervisors see a list of agents who are on teams they supervise.

Related Topics

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Add and Maintain Agents

This procedure explains how to add an agent. For information on maintaining agents, see Update Objects and Delete Objects.

You can add agents one at a time from the **List of Agents** window, using this procedure. You can also do the following:

- Create a new agent by copying an existing agent record (see Add an Agent by Copying an Existing Agent Record, on page 5).
- Run bulk jobs to add or edit multiple agent records (see Manage Bulk Jobs).
- Edit the skill group membership for multiple agents at once (see Edit Skill Group Membership for Multiple Agents, on page 12).
- Edit descriptions, desk settings, and teams for multiple agents at once (see Edit Description, Desk Settings, and Teams for Multiple Agents, on page 13).

Procedure

Step 1 Navigate to **Unified CCE Administration** > **Manage** > **Agents**.

Step 2 Click **New** to open the **New Agent** page.
This page has **General**, **Description**, **Attributes**, **Skill Groups**, **Supervised Teams** tabs. You cannot save the agent until you have entered all the required fields on the **General** tab. You can complete other tabs as needed and in any order.

Step 3 Complete the fields on the **General** tab:

Field	Required?	Description
Single Sign-On	no	Indicates whether the agent is set for single sign-on (SSO). When SSO is enabled, the agent uses Active Directory or other SSO credentials to sign into the agent desktop and other tools. You can check this check box to enable SSO for this agent if SSO is set globally to mixed mode. You cannot edit this setting if SSO is enabled or disabled globally. If SSO is enabled globally, saving the agent's new or updated record enables SSO for the agent.
Login Enabled	no	Checked by default. Uncheck the check box only if you do not want this agent to be able to sign in.
Is Supervisor	no	Check to configure this agent as a Supervisor.
Support Email & Chat	no	This check box appears only when ECE is configured for a peripheral set or a data center. By default, it is not checked.
Username	yes	Enter a unique username for the Agent. Enter up to 255 ASCII characters as the username for this agent. The login name supports the use of all characters from 33 to 126 in the ASCII character set, except for the following: double quotation mark ("), forward slash (/), backward slash (\), square brackets ([ ]), colon (:), semicolon (;), pipe (|), equal to (=), comma (,), plus sign (+), asterisk (*), question mark (?), angle brackets (< >), hash (#), percent (%), and SPACE. For supervisors and for agents with single sign-on (SSO) enabled, the username is the user's Active Directory or SSO account username. For supervisors who are not enabled for single sign-on (SSO), the Active Directory username must be in the user@domain format. **Remember** An agent who is designated as a supervisor signs in to Unified CCE Administration with this username.
First Name	yes	See Native Character Sets.
Last Name	yes	See Native Character Sets.
Agent ID	-	Enter a unique string of up to 11 digits. If you leave this field blank, Packaged CCE automatically generates a 7-digit agent ID, which you can later edit. The agent uses the Agent ID to sign in to Cisco Finesse.
Description	no	Enter a description of the agent. See Native Character Sets.

Field	Required?	Description
Desk Settings	-	The **Desk Settings** field defaults to show the current system-default. (See System Settings for Main Site.) To change it, click the **magnifying glass** icon to display the **Select Desk Settings** list where you can select a different desk setting.
Department	yes (for departmental administrators)	A departmental administrator must select one department from the pop-up list to associate with this agent. The list shows all administrator's departments. A global administrator can retain the default value for this field, which sets the agent as global (belonging to no departments), or can select a department for this agent. See Departments for more information about associating agents with departments.
Site	-	The **Site** field displays Main by default. To add a site: **a.** Click the **magnifying glass** icon to display the list of sites. **b.** Select the required site.
Team	no	The **Team** field defaults to *None*. To change the setting, click the **magnifying glass** icon to display the **Select Team** list and select a team. Only the teams associated to the selected site display. If the agent is associated with a department, you see global teams and teams that are associated with that department in the list. If the agent is a global agent, you see only global teams in the list.
Set Password	no	If single sign-on is not enabled, this setting is checked by default. Uncheck the check box if you do not want to create a password for this agent. If single sign-on is enabled, the password settings on the **General** tab are disabled.
Enter Password	no	Enter and reenter a maximum of 256 ASCII characters to establish and confirm a password for this agent. Password is case-sensitive. The default *Minimum Password Length* is set in system settings. (See System Settings for Global.) For a supervisor, the password must be the supervisor's Active Directory password. **Tip** An agent who is designated as a supervisor signs in to Unified CCE Administration with this password.
Re-enter Password	no	—

Step 4 Complete the **Attributes** tab:

This tab shows the attributes associated with this agent and their current values.

Click **Add** to open a pop-up list of all attributes, showing the name and current default value for each.

a) Click the attributes you want to add for this agent.
b) From the **Value** drop-down list, choose the attribute value as appropriate for this agent.

Step 5 Complete the **Skill Groups** tab:

This tab shows the skill group membership for this agent.

a) Click **Add** to open the **Add Skill Groups** pop-up. You can view only the skill groups associated to the selected site.Click the skill groups you want to add for this agent or supervisor.

Note You can view only the skill groups associated to the selected site in 2000 Agents deployment.

b) Select the default skill group for the agent from the **Default Skill Group** drop-down list.

Step 6 Complete the **Supervised Teams** tab, if **Is Supervisor** is checked.

To select a team, click **Add** to display the **Add Supervised Teams** list, and click the row to select a team.

Note
- You can view only the teams that are associated to the selected site in 2000 Agents deployment.
- If the supervisor is associated with a department, you see only teams associated with that department in the list. If the supervisor is a global supervisor, you see all global and departmental teams in the list.

Step 7 Click **Save** to return to the List window, where a message confirms the successful creation of the agent.

Caution You cannot add a new agent in the following conditions:

- Out of Compliance expiry: The system is operating with an insufficient number of licenses and the system is in enforcement mode.
- Authorization expiry: The system has not communicated with **Cisco Smart Software Manager** or satellite for 90 days and the system has not automatically renewed the entitlement authorizations.
- Evaluation expiry: The license evaluation period has expired.

Add an Agent by Copying an Existing Agent Record

You can create a new agent by copying an existing agent record.

The following fields are copied to the new agent record:

- Department
- Description
- Desk settings
- Team
- Attributes

- Skill Groups
- Default Skill Group
- Site

All other fields are either cleared or set to the default value.

Procedure

Step 1 Navigate to **Unified CCE Administration** > **Manage** > **Agents**.

Step 2 Click the agent you want to copy, and then click the **Copy** button in the **Edit Agent** page.
The **New Agent** page opens.

Step 3 Review the fields on the **General**, **Attributes**, and **Skill Groups** tabs that were copied from the original agent record, and make any necessary changes. Enter information for the fields that were not copied.

Step 4 If the new agent is a supervisor, complete the fields on the **Supervisor** tab.

Step 5 Click **Save** to return to the List window, where a message confirms the successful creation of the agent.

Search for Agents

The Search field in the Agents tool offers an advanced and flexible search.

Click the + icon at the far right of the **Search** field to open a popup window, where you can:

- Select to search for agents only, supervisors only, or both.
- Enter a username, agent ID, first or last name, or description to search for that string.
- Enter one or more site names separated by spaces. (Site is an OR search.)
- Enter one or more peripheral set names separated by spaces (Peripheral Set is an OR search). The search is case-insensitive and does not support partial matches.

Note Search by department is available only when departments are configured.

Search by site is available only when remote sites are configured.

Manage Agent Environment

All agents have a desk settings configuration. They work on an agent desktop and enter reason codes on their agent desktops. Most agents belong to a team.

This section explains these tools, which are selections on the **Manage** > **Agent menu**.

Desk Settings

Desk settings are a collection of permissions or characteristics for the agent, such as how and when calls to the agent are redirected, how and when the agent enters various work states, and how requests to the supervisor are handled.

To configure desk settings, go to **Unified CCE Administration** > **Manage** > **Desk Settings**.

Administrators have unlimited access to Desk Settings configuration. Supervisors cannot access Desk Settings.

Note For any change, you perform in the **Agent Desk Settings** to take effect, log out and then log in to the Finesse Agent Desktop.

Add and Maintain Desk Settings

Procedure

Step 1 Navigate to **Unified CCE Administration** > **Manage** > **Desk Settings**.

Step 2

Step 3 Click **New** to open the **New Desk Settings** window.

Step 4 Complete the following fields:

Field	Required?	Description
Name	yes	Enter a unique name that will identify the desk settings, using a maximum of 32 alphanumeric characters.
Description	no	Enter a description for the desk settings.
Logout Inactivity Time	no	Enter the number of seconds an agent can be inactive while in the Not Ready state before the system logs the agent out. This number can be from 10 seconds to 7200 seconds (2 hours). Leave this field blank to disable the timer. For agents who handle both voice and nonvoice tasks in the Cisco Finesse agent desktop, leave this field blank.
Wrapup on Incoming	yes	From the drop-down menu, select **Optional** (the default), **Required**, **Not Allowed**, to indicate whether the agent is allowed or required to enter wrap-up data after an incoming call. A selection of **Optional** means the agent can choose to enter wrap-up data or to answer another call.

Wrapup on Outgoing	yes	From the drop-down menu, select **Optional** (the default), **Required**, or **Not Allowed** to indicate whether the agent is allowed or required to enter wrap-up data after an outgoing call. A selection of **Optional** means the agent can choose to enter wrap-up data or to answer another call.
Wrapup Timer	no	Enter a value in seconds between 1 and 7200 to specify the time within which the agent can enter wrap-up data before being timed out. The default is 7200 seconds.
Supervisor Assist Call Method	no	From the drop-down menu, select either: • **Consultative Call** (default): The caller is aware when the supervisor joins the call. This option is supported in CTI OS and Finesse agent desktops. • **Blind Conference:** The caller is not aware when the supervisor joins the call. This option is supported only in CTI OS agent desktops.
Emergency Call Method	no	From the drop-down menu, select either: • **Consultative Call** (default): The caller is aware when the supervisor joins the call. This option is supported in CTI OS and Finesse agent desktops. • **Blind Conference:** The caller is not aware when the supervisor joins the call. This option is supported only in CTI OS agent desktops.
Agent State after RONA	no	From the drop-down menu select either: • **Not Ready** (default): The agent is set as not ready after RONA. • **Ready**: The agent is set as ready after RONA.
Mobile Agent	no	From the drop-down menu select one of the following: • **Not Allowed**: In this mode, Mobile Agent is not allowed. • **Call by Call**: In this mode, the Mobile Agent's phone is dialed for each incoming call. When the call ends, the Mobile Agent's phone is disconnected before being made ready for the next call. • **Nailed Up**: In this mode, the agent is called at login time and the line stays connected through multiple customer calls. • **Agent Chooses**: In this mode, an agent can select a call delivery mode at login.

Enable mobile agent	no	Unchecked by default. When checked, indicates that the agent is a Mobile Agent who can sign in remotely and take calls from any phone. With this selected, the agent can also sign in as a normal agent.
Require Idle Reason	no	Unchecked by default. When checked, indicates that the agent must enter a reason before entering the Idle state.
Require Logout Reason	no	Unchecked by default. When checked, indicates that the agent must enter a reason before logging out.
Play zip tone	no	Unchecked by default. Checked, will play a zip tone to the agent when call is auto-answered. **Note** Only if the administrator enables the Auto answer option, Play ziptone can be enabled.

Note There is no RONA timer field on the Desk Settings tool. The Requery on No Answer (RONA) timer on the Unified Cisco Unified Voice Portal (CVP) controls the agent desk settings for Packaged CCE.

Step 5 Save the desk settings to return to the List window, where a message confirms the successful creation.

Reason Codes

Agents enter reason codes on their agent desktops when they become idle (enter “Not Ready” state). Reason codes appear in Unified Intelligence Center reports and help identify agent behavior. Are agents taking an inappropriate number of breaks? How long are agents at lunch or in meetings?

If you configure reason codes in the agent desktop software, then configure the same reason codes in Unified CCE Administration to ensure consistency in reporting.

Navigate to **Unified CCE Administration** > **Manage** > **Reason Codes** to configure reason codes.

Supervisors cannot access the Reason Codes tool.

Add and Maintain Reason Codes

Procedure

Step 1 Navigate to **Unified CCE Administration** > **Manage** > **Reason Codes**.

Step 2 Click **New** to open the **New Reason Code** window.

Step 3 Complete the following fields:

Field	Required?	Description
Text	yes	Enter up to 40 characters to name the reason code.
Code	yes	Enter a unique positive integer between 0 and 65,535.

Description	no	Enter up to 255 characters to describe the reason code. There is no restriction of characters. See Native Character Sets.

Step 4 **Save** the reason code to return to the List window, where a message confirms the successful creation.

Teams

You can create teams to associate a set of agents with supervisors. Supervisors can run reports on the team and receive Supervisor Assist requests from the team members.

Note Supervisor Assist must be indicated in the Desk Settings tool and must be supported by the agent desktop.

Agent cannot be a member of more than one team.

Administrators can see and maintain teams .

Supervisors have display-only access to the Teams tool.

To configure teams, go to **Unified CCE Administration** > **Manage** > **Teams**.

Related Topics

Add and Maintain Teams, on page 10
Agents, on page 1
Manage Supervisors
Add and Maintain Desk Settings, on page 7

Add and Maintain Teams

Procedure

Step 1 Navigate to **Unified CCE Administration** > **Manage** > **Teams**.

Step 2 Click **New** to open the **New Team** window.

Step 3 Complete the fields on the General tab:

Field	Required?	Description
Name	yes	Enter up to 32 alphanumeric characters.
Description	no	Enter up to 255 characters to describe the team. See Native Character Sets.

Field	Required?	Description
Site	yes	The **Site** field displays Main by default. To add a different site: **a.** Click the **magnifying glass** icon to display the list of sites with Agent PG configured. **b.** Select the required site.
Supervisor Script Dialed Number	no	Click the **magnifying glass** icon to display the **Select Supervisor Script Dialed Number** list. The list includes all dialed numbers with a routing type of Internal Voice. Click a row to select a dialed number for supervisor assistance and close the list.

Step 4 Complete the Members tab:

This tab shows a list of agents on the team.

Click **Add** to open the **Add Agents** popup window.The agents associated to the selected site display. The row for each agent has four columns: a column that is either blank or that shows an “i” icon, a column with the agent's username, a column with the agent's last name, and a column with his first name.

If an agent already has an “i” icon indicating that the agent is a member of a team, hover over the icon to see the name of that team. Clicking an agent who already has a team removes that agent from that team and reassigns the agent to this team.

Step 5 Complete the **Supervisors** tab:

This tab shows the supervisors for the team and allows you to add supervisors.

a) Click **Add** to add supervisors to the team. The supervisors associated to the selected site display.
b) Click one or more rows to select supervisors. The supervisors are now in the List of Supervisors.
c) Continue to another tab, or click **Save** to return to the List window, where a message confirms the successful creation of the team.

Manage Agent Expertise

There are two ways that agents can be categorized such that calls are sent to them based on their experience and their expertise in handling specific types of customer concerns.

- You can add an agent to one or more skill groups. For example, agents who work on fulfilling orders might be added to a *Customer Service* or a *Tracking Orders* skill group.
- You can assign one or more attributes to an agent. For example, an agent who speaks fluent Spanish might be assigned an attribute of *Spanish*.

Agent Reskilling

Supervisors can reskill agents who are on teams that they supervise. This procedure explains how to reskill a single agent. For information on reskilling multiple agents at once, see Edit Skill Group Membership for Multiple Agents, on page 12.

Note If you remove an agent from the agent's default skill group, the agent's default skill group is changed to the system defined default skill group.

Procedure

Step 1 Navigate to **Unified CCE Administration Manage** > **Agent** > **Agents**.

Step 2 Click the agent you want to reskill.

Step 3 Click the **Skill Groups** tab.

Step 4 To add a skill group, click the **magnifying glass** icon to open the pop-up list of skill groups. Work in the pop-up window to add skill groups to the agent.

Step 5 To remove a skill group, click the skill group's **x** icon in the **List of Skill Groups** section of the **Skill Groups** tab.

Step 6 Click **Save**.

Edit Skill Group Membership for Multiple Agents

Using the Agent tool, you can edit skill group membership for up to 50 agents at once.

In Packaged CCE deployments only, the agents must all belong to the same site and same department, or all be global agents. The **Edit** button disables if you select:

- Agents from multiple sites or multiple departments.
- A mix of global and departmental agents.
- A mix of agents on main site and remote site.

If you remove an agent from the agent's default skill group, the agent's default skill group is changed to the system defined default skill group.

Tip Use the **Search** field to find the agents whose skill group membership you want to edit. For example, you could find agents belonging to a particular department, team, or skill group, or with certain attributes. (See Search for Agents, on page 6.)

Procedure

Step 1 Navigate to **Unified CCE Administration** > **Manage** > **Agents**.

Step 2 Check the check box for each agent whose skill group membership you want to edit.

To select all agents in a list, check the **select/deselect all** check box in the list header. (The check box is enabled for *select all* only when the number of agents in the list is less than or equal to 50.)

The total number of selected agents appears above the agent list. To uncheck all agents, click the **select/deselect all** check box. (The check box is enabled for *deselect all* when you check one or more agents in the list, regardless of the number of agents in the list.)

Step 3 Click **Edit** > **Skill Groups**.

The **Edit Skill Groups** dialog opens with a list of skill groups.

The **# of Selected Agents** column indicates how many of the selected agents currently belong to each skill group.

In Packaged CCE deployments only, if you select agents from a specific department and a site, global skill groups on that site, and skill groups for that department and site appear in the list. If you have selected global agents from a specific site, all global and departmental skill groups on that site appear in the list.

Step 4 In the **Action** column, click the **+** icon for each skill group to which you want to add the selected agents. Click the **x** icon for each skill group from which you want to remove the selected agents.

Note If all selected agents belong to a skill group, only the **x** icon appears for that skill group. If none of the selected agents belong to a skill group, only the **+** icon appears for that skill group.

The total number of skill groups that you are adding and removing appears at the bottom of the dialog.

Step 5 To undo a skill group membership change, click the **Undo Add** icon in the **Action** column for that skill group.

Step 6 Click **Save**, and then click **Yes** to confirm the changes.

Edit Description, Desk Settings, and Teams for Multiple Agents

Using the Agent tool, you can edit the description, desk settings assignment, and team membership for up to 50 agents at once.

The agents must all belong to the same site and same department, or all be global agents. The **Edit** button disables if you select:

- Agents from multiple sites or multiple departments.
- A mix of global and departmental agents.
- A mix of agents on main site and remote site.

Tip Use the **Search** field to find the agents whose settings you want to edit. For example, you could find agents belonging to a particular department, team, or skill group, or with certain attributes. (See Search for Agents, on page 6.)

Procedure

Step 1 Navigate to **Unified CCE Administration** > **Manage** > **Agents**.

Step 2 Check the check box for each agent whose description, desk settings, and team membership you want to edit.

To select all agents in a list, check the **select/deselect all** check box in the list header. (The check box is enabled for *select all* only when the number of agents in the list is less than or equal to 50.)

The total number of selected agents appears above the agent list. To clear all agents, check the **select/deselect all** check box. (The check box is enabled for *deselect all* when you check one or more agents in the list, regardless of the number of agents in the list.)

Step 3 Click **Edit** > **General**.

The **Edit General Details** pop-up windows opens.

Step 4 To change the description for all selected agents, check the **Description** check box and enter the description in the text field.

Step 5 To assign desk settings to all selected agents:

a) Check the **Desk Settings** check box.

b) Click the **magnifying glass** icon to display the **Select Desk Settings** list, and then select the desk setting.

Step 6 To assign all selected agents to a team:

a) Check the **Team** check box.

b) Click the **magnifying glass** icon to display the **Select Teams** list, and then select the team.

Step 7 Click **Save**, and then click **Yes** to confirm the changes.