



Provisioning

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Tenant Settings

You can use the Webex Contact Center Management Portal to configure the tenants that your administrator provisions for your enterprise. To view the tenant settings for your enterprise, click your enterprise name under the Provisioning module in the navigation bar.

Click the following tabs to configure the tenant settings:

- [General Settings, on page 2](#)
- [Desktop settings](#)
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General Settings

The **General Settings** tab displays the following settings.

In the following table, the cross mark (✓) at the Tenant column indicates the settings that the authorized users of your enterprise specify. Similarly the ✓ mark in the Partner column identifies the settings that the partner administrator specifies. The ✓ in the Webex Contact Center column identifies the settings that the Webex Contact Center administrator specifies.

To modify the settings, click **Edit** at the bottom of the page.

Setting	Description	Tenant	Partner	Webex Contact Center
Tenant Details				
Name	The name of your enterprise.	✓	✓	✓
Description	(Optional) The description for your enterprise.	✓	✓	✓
Time Zone	The time zone that you provision for your enterprise. For more information, see About Time Zones .	✓	✓	✓
Status	The status of the tenant. You cannot change the status of the tenant.			

Desktop settings

The **Desktop** section displays the following settings.

- **Agent experience:** Set the inactivity timeout and auto wrap-up interval.
- **Voice features:** Enable or disable force default DN, end call, and end consult.
- **RONA timeouts:** Configure RONA (Redirection on No Answer) timeouts for unanswered calls.
- **System settings:** Set lost connection recovery timeouts.

Manage RONA timeouts

The contact center administrators can manage the Redirection on No Answer (RONA) timeout settings for agents and customers.

To configure the RONA timeout settings for both inbound and outbound call scenarios:

Procedure

- Step 1** Log in to the customer organization on [Control Hub](#).
- Step 2** Navigate to **Services > Contact Center > Settings > Desktop**.
- Step 3** In the **RONA timeouts** section, enter the timeout values in seconds, for the channels.

The table shows the default value and the allowed range for the RONA timeout settings.

Channels	Default Value (seconds)	Minimum Value (seconds)	Maximum Value (seconds)
Telephony (inbound and outbound)	18	1	120
Chat	30	1	6000
Email	300	1	6000
Social	30	1	6000

Note

- For inbound call scenarios, Webex Contact Center connects the customer call to the agent session for the duration of the unanswered call. The call is then redirected to another agent or skill group. For example, if the Telephony default value is set to 18 seconds and the agent does not receive the call within the specified time, the call goes to RONA state. Webex Contact Center returns the call to the queue and re-routes it to another agent or skill group.
- For outbound call scenarios, the configured time is inclusive of both agent and customer accepting the expected call for the specified duration. Webex Contact Center will first connect to the agent for the time specified and the remaining time will be utilized to connect to the customer. For example, if the Telephony default value is set to 18 seconds and it takes 2 seconds to connect to the agent, the remaining 16 seconds will be utilized to connect to the customer. It is recommended to set an optimal time that balances both the time of the agent and the customer/devices handling the calls.

- Step 4** Click **Save**.

Provisioning

The **Provisioning** tab displays the following settings. The partner administrator and the Webex Contact Center administrator specify these settings.

To modify the settings, click **Edit** at the bottom of the page.

Setting	Description
System Profile	

Setting	Description
Workforce Options	<p>Allows the supervisors to manage the human resources. Supervisors can proactively analyze and adjust for daily realities and make smarter decisions to manage resources to optimize service levels.</p> <p>Workforce Options enable one or more of the following Workforce Optimization options for your enterprise:</p> <ul style="list-style-type: none"> • Quality Management • Workforce Management • WFO Analytics • Workforce Analytics with Transcriptions • Workforce Optimization Bundle <p>The availability of these features depends on your license. Contact your organization administrator for more information.</p>
Campaign Management	<p>Enables the third-party software List and the Campaign Manager (LCM) module for a tenant. LCM manages the upload, selection, and rescheduling of contacts. It also provides campaign manager reports.</p> <p>The availability of this feature depends on your license. Contact your organization administrator for more information.</p>
Speech Enabled IVR	<p>If this setting is Yes, your enterprise allows customers to post questions or concerns in plain language to the system.</p> <p>The availability of this feature depends on your license. Contact your organization administrator for more information.</p>
Web Callback Option	<p>It is a default feature that enables Web Callback for your enterprise. For more information, see About Web Callback.</p>
Recording Storage	<p>The number of months for which the system stores the call recordings.</p> <p>The system calculates the time using the formula:</p> <p>There are 31 days in a month. The system adds a day to the total number of days before deleting the recordings. Thus, 1 month means 32 days, 2 months mean $((31*2)+1)$ days = 63 days, and so on.</p> <p>Note</p> <ul style="list-style-type: none"> • The system hides this field if you do not use the time-based pruning strategy. For more information, see View the pruning details section. • For some tenants, this field shows the value in days. • The system deletes the recordings after the specified number of days.

Settings

The **Settings** tab displays the following settings. An asterisk (*) indicates that the settings are not available to tenants with standard licenses.

In the table below, the ✓ mark in the Tenant column indicates the settings that authorized users of your enterprise specify. Similarly, the ✓ mark in the Partner column identifies the settings that the partner administrator specifies. The ✓ in the Webex Contact Center column identifies the settings that the Webex Contact Center administrator specifies.

To modify the settings, click **Edit** at the bottom of the page.

Setting	Description	Tenant	Partner	Webex Contact Center
Call Settings				
Short Call Threshold	The time interval, in seconds, to determine whether the call is short or abandoned.	✓	✓	✓
Sudden Disconnect Threshold	The time interval, in seconds, to determine whether the agent handles the call or the call ends. The time determines if there is an issue with the connectivity or with the behavior of the agent. You can consider a call as disconnected if the call terminates within this time interval after it reaches a destination site.	✓	✓	✓
Maximum Active Contacts	The maximum number of active conversations that you allow for the channel type. The maximum number of inbound or outbound conversations cannot exceed this value. Note The maximum number of active contacts depends on your license. Contact your organization administrator for more information.		✓	✓
Inbound Maximum Active Contacts	The maximum number of active inbound conversations for any channel. This includes calls, emails, or chats from all the sites, teams, DNAs, queue, and ongoing calls, emails, or chats. The system drops any contact beyond this number.		✓	✓
Outdial Maximum Active Contacts	The maximum number of active outdial calls, emails, or chats across the tenant at any point in time.		✓	✓
Other Settings				
Allow Agent Threshold	If you set Yes , the system enables the Agent Threshold Alert feature for your enterprise. All tenants with a Standard or a Premium license have Agent Threshold Alert. Note: As of now, this feature is not available.	✓	✓	✓

Setting	Description	Tenant	Partner	Webex Contact Center
Maximum Callback Attempts	The number of times the system attempts a requested callback if the initial callback attempt fails.	✓	✓	✓
Retry Callback Interval	The number of seconds between the callback attempts in case the initial callback attempt fails.	✓	✓	✓
Pause/Resume Enabled	<p>If you set Yes, agents can pause and resume recording a call. For example, the agent can pause a call recording while obtaining sensitive information from the customer, such as credit card information.</p> <p>If you set No, you can later enable this feature for individual queues.</p> <p>Note You can use this feature only if your administrator enables the Privacy Shield feature for your enterprise. For more information, contact your administrator.</p>	✓	✓	✓
Recording Pause Duration	This setting specifies the time for which the system pauses the call recording. After the time has elapsed, the system automatically starts recording the call.	✓	✓	✓
Record All Calls	<p>If you set Yes, the system records all inbound and outdial calls.</p> <p>If you set No, the system records calls based on the settings for each queue.</p>	✓	✓	✓

Module Permissions



Note These configurations are accessible only to the Cisco Solution Assurance team. To configure these settings, contact the Cisco Solution Assurance team.

In the following table, the check mark (✓) at the Tenant column indicates the settings that the authorized users of your enterprise specify. Similarly, the ✓ mark in the Partner column identifies the settings the partner administrator specifies. The ✓ in the Webex Contact Center column identifies the settings that the Webex Contact Center administrator specifies.

To modify the settings, click **Edit** at the bottom of the page.

Setting	Description	Tenant	Partner	Webex Contact Center
SBR Enabled	Set to Yes to enable the Skills-Based Routing (SBR) feature for your enterprise.			✓
Maximum Skills	The maximum number of skills that you can define for your enterprise.			✓
Maximum Text Skills	The maximum number of text skills that you can define for your enterprise.			✓
Multimedia Enabled	Set to Yes to enable the Multimedia feature for your enterprise. For more information, see Configure Multimedia Profiles .			
Maximum Channels Per Profile	The maximum number of channels that you can specify for a multimedia profile. You can use this feature, only if your administrator enables the Multimedia feature for your enterprise. For more information, see Multimedia Profiles, on page 58 .			✓
Voice Callback Enabled	Set Yes to enable the Callback call control block for call control scripts. For more information, see Callback Block . A Yes setting here automatically enables Web Callback Enabled.			✓
Web Callback Enabled	Set Yes to enable the Web Callback feature for your enterprise. Note: When you enable Voice Callback Enabled, the system automatically enables Web Callback Enabled. You cannot disable it from here.			✓
Recording Management Enabled	Set to Yes to enable the Recording Management module for your enterprise.			✓
Recording Pruning Strategy	Enable the Recording Management module to specify the recording pruning strategy for your enterprise.			✓
Pruning Value	Specify the value for the recording pruning strategy. Time Based strategy is the only available strategy. The system calculates the Time Based pruning strategy according to your Additional Recording Storage license. For the Time Based strategy, define the number of days to retain the recordings. The system deletes the recordings after the specified number of days.			✓
Analytics Enabled	Set to Yes to enable the Reporting and Analytics module and the Business Rule module.			✓

Setting	Description	Tenant	Partner	Webex Contact Center
Pruning Value	<p>Specifies the value for the selected recording pruning strategy as either 0 for No Pruning or one of the following values:</p> <ul style="list-style-type: none"> For the Time-Based strategy, the number of days to retain recordings. Recordings made before the specified number of days are removed. For the Agent Minutes strategy, the maximum number of minutes of recordings per agent. When the maximum number of minutes is reached, the oldest recordings are removed to make room for new recordings. For the Storage Based strategy, the limit on the total recording size in megabytes. When the limit is reached the oldest recordings beyond the specified storage value are removed. 			✓
Recording Pruning Strategy	<p>If the Recording Management module is enabled for your enterprise, specify the recording pruning strategy for the enterprise: No Pruning, Time Based, Agent Minutes, or Storage Based.</p> <p>When a change is made to this setting, an email is sent to all users who are authorized to change the setting.</p>			✓

Other Permissions

Only the Cisco Solution Assurance team can configure the settings described in the table below. To configure these settings, contact the Cisco Solution Assurance team.

Setting	Description
Number of CAD Variables	The maximum number of active call-associated data (CAD) variables that you can configure. For more information, see Call-Associated Data Variables, on page 55 .
Maximum Address Books	The maximum number of address books that you can configure for your enterprise. For more information, see Create an Address Book, on page 46 .
Maximum Entry Points and Queues	The maximum number of entry points and queues that you can configure for your enterprise.

Setting	Description
Enabled Leg Recording	<p>Set this option to Yes to create the following files for each recorded call:</p> <ul style="list-style-type: none"> • The audio of both the customer and the agent. • The audio of only the customer. • The audio of only the agent. <p>Currently, Enabled Leg Recording is a custom setting.</p> <p>Set this option to No to disable Enabled Leg Recording.</p>
Multiple Time Zone Enabled	<p>Set this option to Yes to associate the entry points and queues with time zones.</p> <p>If you do not specify a time zone, the system provisions a time zone for your enterprise.</p> <p>Set this option to No to disable Multiple Time Zone Enabled.</p>

Entry Points and Queues

Entry points and queues are types of virtual teams. A virtual team is a holding place for incoming customer requests.

You can create entry points and queues depending on how the Webex Contact Center administrator has configured your profile.

Entry Point

The inbound entry point is the initial landing place for a customer contact in the Webex Contact Center system. For the customer calls, you can associate one or more toll-free or dial numbers with a given entry point. The system performs IVR call treatment for a call while the call is in the entry point.

We strongly recommend you to assign new flows directly to an entry point using the business hours activity. For the existing flows, you should also plan to migrate their routing strategy flow configurations to entry point using business hours.

If a flow is associated to an entry point and uses business hours, it will take precedence over the same flow that is associated with a routing strategy as well.

To use entry points for the telephony channel type, ensure that you do the following:

- Map a dial number (DN) to the entry point. For more information, see [Entry Point Mappings, on page 74](#).
- Contact your Webex Contact Center administrator for other Provisioning configurations.

Queue

An inbound queue is where the customer contact waits before the system assigns the customer to an agent or DN.

Create an Entry Point

To create an entry point:

Procedure

Step 1 From the Management Portal navigation bar, choose **Provisioning > Entry Points/Queues**.

Step 2 Choose **Entry Point**.

Step 3 Click **+ New Entry Point**.

Step 4 In the **General Settings** area, enter the following settings:

Setting	Description
Name	The name of the entry point. Note The Name can't exceed 80 characters. It can contain alphanumeric characters, underscores, and hyphens.
Description	A short description of the entry point.
Channel Type	Choose a channel type, such as Telephony, Email, and Chat. The default channel type is Telephony.
Outdial Primary DID URL	The full pathname of the DID .xml file that supports outbound dialing. The Webex Contact Center administrator configures this field. This setting is applicable only for Outdial Entry Point.
Outdial Backup DID URL	The full pathname of the backup DID .xml file. The Webex Contact Center administrator configures this field. This setting is applicable only for Outdial Entry Point.

Step 5 In the **Advanced Settings** area, enter the following settings:

Setting	Description
Service Level Threshold	Enter the duration for which a customer request can be in a queue before the system flags it as outside the service level. If the agent completes a customer service request within this time interval, the system considers it within the service level.
Control Script URL	The system automatically populates this field with the URL for this entry point or the default control script of the queue. It happens when you don't configure the control script using the Webex Contact Center Routing Strategy module. This setting is available for the Telephony channel type.
IVR Requeue URL	Currently we don't support this setting.

Setting	Description
Overflow Number	Enter the destination phone number to which the system diverts the customer calls when they exceed the Maximum Time in Queue that you have set in the routing strategy. This setting is applicable only for the Telephony channel type.
Vendor ID	Enter the unique alphanumeric string that maps this entry point to the vendor. Currently, we don't support this setting.
Time Zone (Routing Strategies Only)	(Optional) Enter the time zone that routing strategies use for this entry point. The default time zone is the time zone of the tenant.
DN List	
IVR DN List	Enter the DN pool list numbers if you want to integrate this entry point with an external IVR. This setting is available for the Telephony channel type.

Step 6 Click **Save**.

View the Details of an Entry Point

To view an entry point:

Procedure

- Step 1** From the Management Portal navigation bar, choose **Provisioning > Entry Points/Queues**.
- Step 2** Choose **Entry Point**.
- Step 3** Click the ellipsis icon beside an entry point and click **View**. You can view the following details:

Setting	Description
Name	The name of the entry point. Note The Name can't exceed 80 characters. It can contain alphanumeric characters, underscores, and hyphens.
Description	A short description of the entry point.
Channel Type	Choose a channel type, such as Telephony, Email, and Chat. The default channel type is Telephony.
Outdial Primary DID URL	The full pathname of the DID .xml file that supports outbound dialing. The Webex Contact Center administrator configures this field. This setting is applicable only for Outdial Entry Point.

Setting	Description
Outdial Backup DID URL	The full pathname of the backup DID .xml file. The Webex Contact Center administrator configures this field. This setting is applicable only for Outdial Entry Point.

Edit an Entry Point

To edit an entry point:

Procedure

- Step 1** From the Management Portal navigation bar, choose **Provisioning > Entry Points/Queues**.
- Step 2** Choose **Entry Point**.
- Step 3** Click the ellipsis icon beside an entry point and click **Edit**.
- Step 4** You can edit the following fields:

Setting	Description
Name	The name of the entry point. Note The Name can't exceed 80 characters. It can contain alphanumeric characters, underscores, and hyphens.
Description	A short description of the entry point.
Channel Type	Choose a channel type, such as Telephony, Email, and Chat. The default channel type is Telephony.
Outdial Primary DID URL	The full pathname of the DID .xml file that supports outbound dialing. The Webex Contact Center administrator configures this field. This setting is applicable only for Outdial Entry Point.
Outdial Backup DID URL	The full pathname of the backup DID .xml file. The Webex Contact Center administrator configures this field. This setting is applicable only for Outdial Entry Point.

Copy an Entry Point

To copy an entry point:

Procedure

- Step 1** From the Management Portal navigation bar, choose **Provisioning > Entry Points/Queues**.
- Step 2** Choose **Entry Point**.
- Step 3** Click the ellipsis icon beside an entry point and click **Copy**.
A copy of the selected entry point appears. The fields have the same values as the original entry point.
You can save the same entry point with a different name or edit and save the entry point.
- Step 4** You can edit the following details:
- Note** There are some settings that you cannot edit. You can edit the Chat Template settings from <https://admin.webex.com/>.

Setting	Description
Name	The name of the entry point. Note The Name can't exceed 80 characters. It can contain alphanumeric characters, underscores, and hyphens.
Description	A short description of the entry point.
Channel Type	Choose a channel type, such as Telephony, Email, and Chat. The default channel type is Telephony.
Outdial Primary DID URL	The full pathname of the DID .xml file that supports outbound dialing. The Webex Contact Center administrator configures this field. This setting is applicable only for Outdial Entry Point.
Outdial Backup DID URL	The full pathname of the backup DID .xml file. The Webex Contact Center administrator configures this field. This setting is applicable only for Outdial Entry Point.

Create a Queue or an Outdial Queue

To create a queue or an outdial queue:

Procedure

- Step 1** From the Management Portal navigation bar, choose **Provisioning > Entry Points/Queues**.
- Step 2** Choose **Queue** or **Outdial Queue**.
- Step 3** Click the **+ New Queue** or **+ New Outdial Queue**.
- Step 4** Enter the following settings for the queue and click **Save**:

View the Details of a Queue or an Outdial Queue

To view a queue or an outdial queue:

Procedure

- Step 1** From the Management Portal navigation bar, choose **Provisioning > Entry Points/Queues**.
 - Step 2** Choose **Queue** or **Outdial Queue**.
 - Step 3** Click the ellipsis icon beside a queue and click **View**. You can view the following details:
-

Edit a Queue or an Outdial Queue

To edit a **Queue** or **Outdial Queue** queue:

Procedure

- Step 1** From the Management Portal navigation bar, choose **Provisioning > Entry Points/Queues**.
- Step 2** Choose **Queue** or **Outdial Queue**.
- Step 3** Click the ellipsis icon beside a queue and click **Edit**.
- Step 4** You can edit the following fields:

Note There are some settings that you cannot edit. You can edit the Chat Template settings from [Cisco Webex Control Hub](#).

Copy a Queue or an Outdial Queue

To copy a **Queue** or **Outdial Queue**:

Procedure

- Step 1** From the Management Portal navigation bar, choose **Provisioning > Entry Points/Queues**.
- Step 2** Choose **Queue** or **Outdial Queue**.
- Step 3** Click the ellipsis icon beside a queue and click **Copy**.
A copy of the **Queue** or **Outdial Queue** page appears. The fields have the same values as the original queue.
You can save the same queue with a different name or edit the queue.
- Step 4** You can edit the following details and click **Save**:

Note You cannot edit some settings. You can edit the Chat Template settings from <https://admin.webex.com/>.

Deactivate an Entry Point or a Queue

You cannot deactivate an entry point or queue if you associate it with any other entities such as dial numbers or other routing strategy. When you try to deactivate these entry points or queues, you get an error message. Click the information icon at the end of the message to view the list of all the associated entities.

After you deactivate an entry point or queue, you can still see it in the Entry Points/Queues page as Not Active. Historical reports also display details of the deactivated entry points or queues.

In the Entry Points/Queues page, you can click the ellipsis icon and then the restore icon to reactivate an entry point or queue.

To deactivate an entry point or queue:

Procedure

- Step 1** From the Management Portal navigation bar, choose **Provisioning > Entry Points/Queues**.
- Step 2** Choose the type of entry point or queue that you want to deactivate.
- Step 3** Click the ellipsis icon beside an entry point or queue and click **Mark Inactive**.
- Step 4** Click **Yes** to confirm.

Note Once the object is marked inactive, it can be permanently deleted. For more information, see [Delete inactive objects permanently, on page 80](#).

Activate an Entry Point or a Queue

Procedure

- Step 1** From the Management Portal navigation bar, choose **Provisioning > Entry Points/Queues**.
 - Step 2** Choose the type of entry point or queue that you want to activate.
 - Step 3** Click the ellipsis icon beside the entry point or queue with the status Not Active and click **Restore**.
 - Step 4** Click **Yes** to confirm.
The status of the entry point or queue changes to Active.
-

Sites

A site is a physical contact center location under the control of your enterprise. For example, enterprise Acme can have sites in Chicago, Manila, and Bangalore with agents to handle customer contacts.

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

Create a Site

To create a site:

Procedure

- Step 1** From the Management Portal navigation bar, choose **Provisioning > Entry Points/Queues**.
- Step 2** Click **+ New Site**.
- Step 3** Enter the following details and click **Save**:

Settings	Description
General Settings	
Name	Enter a name for the site.
Latitude	Enter the geographical coordinates of the site.
Longitude	
Advanced Settings	
Multimedia Profile	This setting is available, if your administrator enables Multimedia for your enterprise. Select a multimedia profile for the site. If you do not assign, the system assigns the <i>Default_Telephony_Profile</i> . For more information, see Multimedia Profiles, on page 58 .
Block Area Codes	Click Yes or No to specify whether to block the routing of calls to this site for the area codes. When you click Yes , the Area Codes To Block field appears. Click the icon below the Area Codes To Block field to display the Choose Area Codes. Select the area codes that you want to block. For more information, see Block an Area Code, on page 16 .

Block an Area Code

You can block area codes when you create a new site or edit an existing site. To block an area code:

Procedure

Step 1 From the Management Portal navigation bar, choose **Provisioning > Site**.

Step 2 Do one of the following:

- Click + **New Site**.
- Click the ellipsis icon beside a site that you want to edit and click **Edit**.

Step 3 Set Block Area Codes to **Yes**.

Step 4 Click the edit icon in the Area Codes to Block text box.

Step 5 In the Choose Area Codes, enter the following details, and click **Save**:

Setting	Description
State	Select the state from the drop-down list. Note: You can select multiple states. For each state that you select, you must enter area codes.
Area Codes	Enter the area code. You can enter multiple area codes.

You can see the area codes and the corresponding states in the Selected Area Code Details panel.

Step 6 (Optional) Click **Delete** under Action, if you want to delete the area codes.

View the Details of a Site

To view the details of a site:

Procedure

Step 1 From the Management Portal navigation bar, choose **Provisioning > Site**.

Step 2 Click the ellipsis icon beside the site that you want to view, and click **View**.

Step 3 You can view the following settings:

Setting	Description
General Settings	
Name	The name of the site. Generally, the name is the geographical location.
Latitude	The geographical coordinates of the site.
Longitude	
Advanced Settings	
Status	The status of the site.

Setting	Description
Multimedia Profile	The multimedia profile for the site. If you do n't assign a profile to the site, the system assigns the <i>Default_Telephony_Profile</i> . This setting is available, if the administrator enables Multimedia for your enterprise. For more information, see Multimedia Profiles, on page 58 .
Block Area Codes	The area codes that you want to block. Or, add area codes to block. For more information, see Create a Site, on page 16 and Block an Area Code, on page 16 .

Edit a Site

To edit a site:

Procedure

- Step 1** From the Management Portal navigation bar, choose **Provisioning > Site**.
- Step 2** Click the ellipsis icon beside the site that you want to edit, and click **Edit**.
- Step 3** You can edit the following settings. Click **Save** after you have made the changes:

Setting	Description
General Settings	
Name	Edit the name of the site. Generally, it is the name of the geographical location.
Latitude	Edit the geographical coordinates of the site.
Longitude	
Advanced Settings	
Status	Modify the status of the site.
Multimedia Profile	Modify the multimedia profile for the site. If you do not assign a profile to the site, the system assigns the <i>Default_Telephony_Profile</i> . This setting is available if the administrator has enabled Multimedia for your enterprise. For more information, see Multimedia Profiles, on page 58 .
Block Area Codes	Modify the area codes that you want to block. Or, add area codes to block. For more information, see Create a Site, on page 16 and Block an Area Code, on page 16 .

Deactivate a Site

You cannot deactivate a site if agents or active teams are associated with the site. If you try to deactivate such a site, a message informs you that you cannot deactivate the site. You can click the information icon in the message to view the list of entities that are associated with this site.

If you deactivate a site, you can still see it in the Sites page as Not Active. Historical reports also display details of the deactivated sites.

To deactivate a site:

Procedure

- Step 1** From the Management Portal navigation bar, choose **Provisioning > Site**.
- Step 2** Click the ellipsis icon beside the site you want to deactivate, and click **Mark Inactive**.
- Step 3** Click **Yes** to confirm.
The status of the site changes to Not Active.

Note Once the object is marked inactive, it can be permanently deleted. For more information, see [Delete inactive objects permanently, on page 80](#).

Activate a Site

Procedure

- Step 1** From the Management Portal navigation bar, choose **Provisioning > Site**.
 - Step 2** Click the ellipsis icon beside the site that you want to activate and click **Restore**.
 - Step 3** Click **Yes** to confirm.
The status of the site changes to Active.
-

Teams

A team is a group of people who support a specific group of functions. For example, supporting the Gold customers or managing billing, and so on. A team consists of agents and is associated with a specific site.

Create a team

Procedure

- Step 1** From the Management Portal navigation bar, choose **Provisioning > Team**.

Step 2 Click **+ New Team**.

Step 3 Enter the following details:

Setting	Description
General Settings	
Site	Choose the site from the drop-down list. You can't edit the site later.
Name	Enter a name for the team. Use names that indicate the function of the team, such as Billing or Customer Support.
Type	Choose a team type: <ul style="list-style-type: none"> • Agent Based: You assign a specific number of agents to the team. • Capacity Based: You don't assign any specific number of agents to the team. You use capacity-based teams for voice mailboxes or agent groups that Webex Contact Center does not manage.
Advanced Settings	
DN	Enter the dial number where the system distributes the calls for this team. This setting is applicable only for capacity-based teams.
Priority	The priority of the team. Currently Cisco doesn't support this feature.
Skill Profile	(Optional) If your organization administrator enables the optional Skills-based Routing feature for your enterprise, you can select a skill profile for this team. For more information, see Skill Profiles, on page 64 .
Multimedia Profile	(Optional) If your organization administrator enables Multimedia for your enterprise, you can select a multimedia profile for this team. For more information, see Multimedia Profiles, on page 58 . This profile overrides the multimedia profile that you assign to the site of this team. <p>Note You can't assign this profile to a capacity-based team.</p>
Agents	From the drop-down list, choose the agents you want to add to the team. You can assign only the agents that your organization administrator configures for your enterprise. For more information, see View the Details of a User, on page 23 . <p>Note You can't assign this profile to a capacity-based team.</p>

Step 4 Click **Save**.

View a team

Procedure

- Step 1** From the Management Portal navigation bar, choose **Provisioning > Team**.
- Step 2** Click the ellipsis icon beside the team that you want to view, and click **View**. You can view all of the configured details.

Edit a team

Procedure

- Step 1** From the Management Portal navigation bar, choose **Provisioning > Team**.
- Step 2** Click the ellipsis icon beside the team that you want to edit, and click **Edit**. You can edit the following settings:

Setting	Description
General Settings	
Site	Choose the site from the drop-down list. You can't edit the site later.
Name	Enter a name for the team. Use names that indicate the function of the team, such as Billing or Customer Support.
Type	Choose a team type: <ul style="list-style-type: none"> • Agent Based: You assign a specific number of agents to the team. • Capacity Based: You don't assign any specific number of agents to the team. You use capacity-based teams for voice mailboxes or agent groups that Webex Contact Center does not manage.
Advanced Settings	
DN	Enter the dial number where the system distributes the calls for this team. This setting is applicable only for capacity-based teams.
Priority	The priority of the team. Currently Cisco doesn't support this feature.
Skill Profile	(Optional) If your organization administrator enables the optional Skills-based Routing feature for your enterprise, you can select a skill profile for this team. For more information, see Skill Profiles, on page 64 .

Setting	Description
Multimedia Profile	<p>(Optional) If your organization administrator enables Multimedia for your enterprise, you can select a multimedia profile for this team. For more information, see Multimedia Profiles, on page 58. This profile overrides the multimedia profile that you assign to the site of this team.</p> <p>Note You can't assign this profile to a capacity-based team.</p>
Agents	<p>From the drop-down list, choose the agents you want to add to the team. You can assign only the agents that your organization administrator configures for your enterprise. For more information, see View the Details of a User, on page 23.</p> <p>Note You can't assign this profile to a capacity-based team.</p>

Deactivate a team

You cannot deactivate teams associated with agents or active routing strategies. When you try to deactivate such teams, Management Portal displays a message that the team cannot be deactivated. You can click the information icon in the message to view the list of entities associated with a team.

If you deactivate a team, you still see the Teams page as Not Active. Historical reports also display details of deactivated teams.

Procedure

-
- Step 1** From the Management Portal navigation bar, choose **Provisioning > Team**.
- Step 2** Click the ellipsis icon beside the team that you want to deactivate, and click **Mark Inactive**.
- Step 3** Click **Yes** to confirm.
The status of the team changes to Not Active.
- Note** Once the object is marked inactive, it can be permanently deleted. For more information, see [Delete inactive objects permanently, on page 80](#).
-

Activate a Team

Procedure

-
- Step 1** From the Management Portal navigation bar, choose **Provisioning > Team**.
- Step 2** Click the ellipsis icon beside the team that you want to activate and click **Restore**.
- Step 3** Click **Yes** to confirm.

The status of the team changes to **Active**.

Users

Users of a contact center are agents, supervisors, and managers. A user profile defines a user's access privileges for the Management Portal. Management Portal modules provide users with real-time visibility and control over resources for which they are responsible.

An agent user account must include a user profile granting access to the Agent Desktop module, and must include an agent profile, as described in [Agent Profiles, on page 37](#). Agents use the Webex Contact Center Desktop to manage customer interactions .



Note You can create and delete users through [Control Hub](#).

Management Portal synchronizes users with contact center licenses from Control Hub, irrespective of their status.

By default, you are shown only active users. To view inactive users, check the **Show Inactive Users** check box.

View the Details of a User

Procedure

- Step 1** From the Management Portal navigation bar, choose **Provisioning > Users**.
- Step 2** To view the details of a user, click the ellipsis icon beside the first name, and then click **View**.
-

Edit a User

Procedure

- Step 1** From the Management Portal navigation bar, choose **Provisioning > Users**.
- Step 2** To edit the details of a user, click the ellipsis button next to the first name of the user and then click **Edit**. You can edit the following settings:

Setting	Description
General Settings	
Country	Edit the country in which the user resides.
State	Edit the state in which the user resides.

Setting	Description
City	Edit the city in which the user resides.
Street	Edit the street in which the user resides.
Work	Edit the work phone number of the user.
Mobile	Edit the mobile phone number of the user.
Zip Code	Edit the postal code of the user.
User Profile	Edit the profile of the user. For more information, see Manage a User Profile, on page 27 .
Contact Center Enabled	Click On to provide the user access to Agent Desktop.
Status	Edit the status of the user.
Supervisor Settings	
Agent Settings	
Site	<p>The site of the agent. For more information, see Create a Site, on page 16.</p> <p>Ensure that the following conditions are met when you change the site of a user:</p> <ul style="list-style-type: none"> • The agent isn't signed in to the Agent Desktop when the site is changed. You can sign out the agent explicitly or change the site during a scheduled maintenance. • If the site attribute is changed while an agent is signed in, the agent experiences errors and unexpected desktop behavior. <p>When you change the site:</p> <ul style="list-style-type: none"> • The team assigned to the agent is automatically reset. You must assign a new team to the agent. • The agent profile is reset if its parent type attribute is Site. The agent profile isn't reset if its parent type attribute is Tenant. • The agent can't see the data that is related to the previously assigned site in the Agent Performance Statistics Reports on the Agent Desktop.
Teams	The teams to which the agent belongs. To assign the agent to one or more teams, choose the teams from the drop-down list.
Skill Profile	<p>Edit the skill profile of the agent. Choose a profile from the drop-down list.</p> <p>This feature is available if your administrator enables the optional Skills-Based Routing feature for your enterprise. This profile overrides any skill profile at the team level that is associated with the agent. For more information, see Skill Profiles, on page 64.</p>

Setting	Description
Agent Profile	Edit the profile of the agent. Choose a profile from the drop-down list. For more information, see Agent Profiles, on page 37 . Note: An agent can belong to several teams, but has a single agent profile.
Multimedia Profile	Edit the multimedia profile of the agent. Choose a profile from the drop-down list. Note You can't assign custom multimedia profiles to standard agents. This field is grayed out by default when you choose a standard agent. This feature is available if your administrator enables the optional Multimedia feature for your enterprise. This profile overrides the multimedia profile of the team that the agent uses to log in to the Agent Desktop. For more information, see Multimedia Profiles, on page 58 .
Default DN	(Optional) Edit the dial number of the agent. If a dial number isn't specified for the agent, you can add a dial number.
External ID	(Optional) Edit the identification details of the agent, such as the employee number.

You can edit the following settings from [Cisco Webex Control Hub](#):

Setting	Description
General Settings	
Username	The name that the user uses to log in to Management Portal.
First Name	The first name of the user.
Last Name	The last name of the user.
Email	The email address of the user.

Export Items Provisioned for a User

To export the details of the items that you have provisioned for a user:

Procedure

- Step 1** From the Management Portal navigation bar, choose **Provisioning > Users**.
- Step 2** Click the ellipsis icon beside a username and click **Excel** or **PDF**. The report contains details of the following items:

Setting	Description
Active Inbound Entry Point Details	The details of the entry points that you map to the user.
Outdial Entry Points	The details of outdial entry points that you map to the user.
Inbound Queues	The details of inbound queues that you map to the user.
Outdial Queues	The details of outdial queues that you map to the user.
Sites	The details of the sites that you map to the user.
Teams	The details of the teams that you map to the user.
Agents	The details of the agents that you map to the user.

Revoke API Key for a User

To revoke API key for a user:

Procedure

Step 1 From the Management Portal navigation bar, choose **Provisioning > Users**.

Step 2 Click the ellipsis icon beside the required user and click **Revoke API Key**.
A message appears that you have successfully revoked the API Key for the user.


If you do not map an API key to the profile of that user, an error message appears that the user does not have an API key.

Update and Upload Agent Template

To upload the details of multiple agents simultaneously:

Procedure

Step 1 From the Management Portal navigation bar, choose **Provisioning > Users**.

Step 2 To download the template, click the **Export as CSV** () icon.

Step 3 Click **Bulk Update** () icon.

Step 4 Browse the Agent Update template from your local system and choose the template.

- Step 5** Click **Upload**.
- Step 6** (Optional) Check the status of the upload from Bulk Operations Status in Provisioning.

User Profiles

Manage a User Profile

To create a user profile:

Procedure

- Step 1** From the Management Portal navigation bar, choose **Provisioning > User Profiles**.
- Step 2** Click the + **New User Profile**.
- Step 3** Enter the details in the following tabs and click **Save** in each tab.
- [General Settings, on page 27](#)
 - [Module Settings, on page 28](#)
 - [Access Rights, on page 30](#)

General Settings

When you configure a new user profile or edit an existing user profile, you can change the following settings in the General Settings tab.

Parameter	Description
Name	Enter a name for the user profile. When you copy a user profile, the system appends the words <i>copy_of</i> before the name of the original user profile. You can keep the same name or edit it as per your requirement.
Description	(Optional) Enter a description for the profile.
Profile Type	Choose a type to determine the privilege level for this profile. For Management Portal, generic profile and module mapping are: <ul style="list-style-type: none"> • Premium Agent—Has access to Agent Desktop and Multimedia module. • Supervisor—Has access to all modules but can't manage tenants in the Provisioning module. • Administrator—Has access to all modules. You can't edit the profile type later.

Parameter	Description
Status	You can view and change this setting only when you edit or copy a user profile.

Module Settings

You can use user profiles to control access to Management Portal. The **Module Settings** tab allows you to specify permissions to the Management Portal modules. You can set module access when you create a new user profile, or edit or copy an existing user profile.

The **Module Access** has the following options:

If you click **All** for Module Access, then the user profile can access all of the modules. Click **Specific** if you want to provide the user access to selected modules only.

You can specify access to the following specific modules.

Setting	Description
Agent Desktop	Allows the user to access the Desktop.
Call Monitoring	<p>Allows the user to silently monitor the quality of service that is delivered to customers across multisource contact centers. The user can silently monitor a selected queue, team, site, or agent if you enable Call Monitoring for the user.</p> <p>To enable the following settings, click the toggle button:</p> <ul style="list-style-type: none"> • Whisper Coach: Allows the user who is monitoring the call to speak to the agent (who is handling the call), without the customer hearing the conversation. • Barge-In: Allows the user to join any call that the user is monitoring and participate in the conversation between the agent and the customer. • Restricted Monitor Only: Prevents the user from viewing and editing monitoring schedules that the user did not create. • View Blind Monitor Requests: Allows the user to view blind monitoring requests of other users.
Call Recording	Allows the user to record any active Webex Contact Center call. The user can select the call from a queue, team, site, or agent, and specify the duration for which to record the call.
Multimedia	<p>Allows authorized users to choose a multimedia profile for the user, that includes all types of media such as voice, chat, email, and social. If Multimedia is not enabled, when you edit the user's details via Provisioning > Users, the Multimedia Profile drop-down list displays only the default telephony profile.</p> <p>Note Users with Standard Agent user profile have access to Digital Channels only.</p>

Setting	Description
Provisioning	<p>Provides the user access to the Provisioning module. The user can perform provisioning activities for the enterprise only if you select Edit in the Provisioning drop-down list. You can control access for an administrator user to perform the following provisioning activities for the enterprise:</p> <ul style="list-style-type: none"> • Manage Entry Points/Queues: Allows the user to manage Webex Contact Center entry points and queues. • Manage Sites: Allows the user to manage Webex Contact Center sites. • Manage Teams: Allows the user to manage Webex Contact Center teams. • Manage Users: Allows the user to manage Webex Contact Center users. • Manage User Profiles: Allows the user to manage Webex Contact Center user profiles. • DN Mappings: Allows the user to map DNs to entry points. • Manage Dial Plans: Allows the user to create and edit dial plans. • Audit Trail: Allows the user to access the Audit Trail interface. This interface allows users to view details of the provisioning changes for the enterprise. • Branding: Provides the user access to the Custom Theme settings on the Management Portal landing page. The user can customize the banner color and images on the Management Portal pages. • Manage Tenants: Allows the user to edit some of the tenant settings in the Provisioning module.
Recording Management	<p>Provides access to the Recording Management module, which allows the user to search for and play audio files recorded through the Webex Contact Center Call Recording feature. You can enable the following permissions to the Recording Management module:</p> <ul style="list-style-type: none"> • Tags: Allows the user to access the Tags tab to view, create, and edit tags that can be assigned to audio files. You can use these tags as search criteria. • Custom Attributes: Allows the user to access the Custom Attributes tab to create and modify custom attributes whose values can be saved with the recordings and can be later searched for. • Security Keys: Allows the user to access the Security Keys tab to view and change the schedule for generating security key pairs.
Reporting and Analytics	<p>Provides access to the Reporting and Analytics module. The Reporting and Analytics module allows the user to segment, profile, and visualize the data in contact center systems. This module also helps to identify the key variables that impact productivity and desired business outcomes. Users can configure and modify the Analyzer schemas using this module.</p> <p>You can provide the user access to Business Rules if you have enabled View or Edit permissions for the Reporting and Analytics module. Business Rules enable the user to incorporate customer data into the Webex Contact Center environment for custom routing and other generic implementation.</p>

Setting	Description
Routing Strategy	<p>Provides you access to the web-based user interface for managing and configuring call handling strategies.</p> <p>You can create and schedule global call routing and team capacity strategies and alter them in real-time in response to changes in business dynamics.</p> <p>You can enable the following permissions to the Routing Strategy module:</p> <ul style="list-style-type: none"> • Manage Call Flow Scripts: Allows you to upload and update call control scripts. A control script defines how calls are handled. • Manage Flows: Allows you to create and manage flows. A flow defines how you handle the calls. • Manage Media Files: Allows you to upload and update media resources such as audio-on-hold files for use in routing strategies. Resource files with .wav, .ulaw, .au, .php, and .xml extensions are supported along with other formats, depending on how the tenant's system is configured.

Access Rights

You can configure the following settings from the **Access Rights** tab when you configure a new user profile or edit an existing user profile:

- Entry Points
- Cloud Connect Deployments
- Queues
- Sites
- Teams

From the drop-down list, choose the specific entities that the user can access. You can choose **All** to provide access to all entities of that type.



Note The Cloud Connect Deployments field appears only for Cloud Connect users. Deployments that you have already configured appear in the drop-down list. The Queues and Sites drop-down list appears according to the deployments that you select.

View the Details of a User Profile

To view the details of a user profile:

Procedure

- Step 1** From the Management Portal navigation bar, choose **Provisioning > User Profiles**.

Step 2 Click the ellipsis icon beside a user profile and click **View**.

Step 3 You can view the following details:

- [General Settings, on page 27](#)
 - [Module Settings, on page 28](#)
 - [Access Rights, on page 30](#)
-

Edit a User Profile

To edit a user profile:

Procedure

Step 1 From the Management Portal navigation bar, choose **Provisioning > User Profiles**.

Step 2 Click the ellipsis icon beside a user profile that you want to edit and click **Edit**.

Step 3 You can edit the details in the following tabs and click **Save** in each tab:

- [General Settings, on page 27](#)
 - [Module Settings, on page 28](#)
 - [Access Rights, on page 30](#)
-

Deactivate a User Profile

Before you begin

Ensure that you do not associate the user profile to any entity before you deactivate the user profile.

To deactivate a user profile:

Procedure

Step 1 From the Management Portal navigation bar, choose **Provisioning > User Profiles**.

Step 2 Click the ellipsis icon beside a user profile and click **Mark Inactive**.

Step 3 Click **Yes** to confirm.

The status of the user profile changes to Not Active.

Note Once the object is marked inactive, it can be permanently deleted. For more information, see [Delete inactive objects permanently, on page 80](#).

Activate a User Profile

Procedure

- Step 1** From the Management Portal navigation bar, choose **Provisioning > User Profiles**.
- Step 2** Click the ellipsis icon beside the user profile that you want to activate and click **Restore**.
- Step 3** Click **Yes** to confirm.
The status of the user profile changes to Active.
-

Copy a User Profile

You can copy an existing user profile, update the details, and save the profile with a different name.

To copy a user profile:

Procedure

- Step 1** From the Management Portal navigation bar, choose **Provisioning > User Profiles**.
- Step 2** Click the ellipsis icon beside a user profile that you want to copy, and click **Copy**.
- Step 3** Enter the details in the following tabs and click **Save** in each tab.
- [General Settings, on page 27](#)
 - [Module Settings, on page 28](#)
 - [Access Rights, on page 30](#)
-

Work Types

When you create an idle or wrap-up code, you associate it with a work type. Work types group idle and wrap-up codes in auxiliary reports.

Create a Work Type

To create a work type:

Procedure

- Step 1** From the Management Portal navigation bar, choose **Provisioning > Work Types**.
- Step 2** Click **+ New Work Type**.

Step 3 Enter the following details and click **Save**:

Setting	Description
Name	Enter a name for the work type.
Description	(Optional) Enter a description of the work type.
Type	Specify the type of auxiliary code to associate with the work type.

Edit a Work Type

To edit a work type:

Procedure

Step 1 From the Management Portal navigation bar, choose **Provisioning > Work Types**.

Step 2 Click the ellipsis icon beside the work type that you want to edit and click **Edit**. Except the Type, you can edit the following settings:

Setting	Description
Name	Edit the name for the work type.
Status	You cannot edit the status. It can only be changed if the Restore option is used. You cannot assign an inactive work type to an auxiliary code.
Description	(Optionally) Edit the description of the work type.
Type	Specifies the type of auxiliary code. You cannot edit this setting.

Deactivate a Work Type

You cannot deactivate a work type if there are any auxiliary codes that are associated with the work type. When you try to deactivate such a work type, a message informs you that you cannot deactivate the work type. You can click the information icon in the message to view the list of entities that you have associated with this work type.

After you deactivate a work type, you can still see it in the Work Types page as Not Active work types. Historical reports also display details of the deactivated work types.

To deactivate a work type:

Procedure

- Step 1** From the Management Portal navigation bar, choose **Provisioning > Work Types**.
- Step 2** Click the ellipsis icon beside the work type that you want to deactivate and click **Mark Inactive**.
- Step 3** Click **Yes** to confirm.
The status of the work type changes to Not Active.

Note Once the object is marked inactive, it can be permanently deleted. For more information, see [Delete inactive objects permanently, on page 80](#).

Activate a Work Type

To activate a work type:

Procedure

- Step 1** From the Management Portal navigation bar, choose **Provisioning > Work Types**.
- Step 2** Click the ellipsis icon beside the work type that you want to activate and click **Restore**.
- Step 3** Click **Yes** to confirm.
The status of the work type changes to Active.
-

Auxiliary Codes

Idle or wrap up codes are two types of Auxiliary codes. Agents select Idle or Wrap-Up codes in Webex Contact Center Agent Desktop to indicate their unavailability or status of the customer contacts. Idle codes typically indicate why an agent is not available to take customer contacts, such as during a lunch break or meeting. Wrap-up codes indicate the result of the customer contacts, for example, the agent escalated the contact, or sold a service.

You associate each idle or wrap-up code with a work type. Work types are values that the system uses to group idle and wrap-up codes in auxiliary reports. For more information, see [Create a Work Type, on page 32](#).

Agents can use an idle or wrap-up code if you assign the code to their profile. You must add at least one idle code and one wrap-up code in an agent profile. For more information, see [Agent Profiles, on page 37](#).



Note If your enterprise uses the outdial feature, it is recommended that you create a wrap-up code such as `Outdial Failed`. Agents can use this code when they are in the wrap-up state after initiating an outdial call that fails to connect.

Create Idle or Wrap-Up Codes

To create an idle or wrap-up code:

Procedure

- Step 1** From the Management Portal navigation bar, choose **Provisioning > Auxiliary Codes**. The Aux Codes Idle Codes page appears. To view the list of wrap-up codes, click **Wrap Up Codes** at the top of the page.
- Step 2** Click **+ New Idle Code** or **+ New Wrap Up Code**.
- Step 3** Enter the following details and click **Save**.

Setting	Description
Name	Enter the code name.
Description	(Optional) Enter a description of the code.
Is Default	<p>Click Yes or No to indicate whether this is the default code.</p> <ul style="list-style-type: none"> If this is the first idle or wrap-up code for your organization, you must make it the default. You can modify it later after you create more codes. When you make a code default, the system overrides the existing default code. At one point, there can be only one default code each for Idle and wrap-up. <p>You must assign the default idle and wrap-up codes in agent profiles. For more information, see Agent Profiles.</p> <ul style="list-style-type: none"> The default wrap-up code is used when the agent's profile specifies Auto Wrap Up. These agents do not enter wrap-up codes. Instead, they automatically go into the Available state after completing an incoming call and automatically go into the Idle state after making an outdial call. The default idle code is used when the agent initially logs in and after the agent makes an outdial call if the agent's profile specifies Auto wrap-up.
Work Type	Select the work type that you want to associate with this code.

Edit Idle or Wrap-Up Codes

Procedure

- Step 1** From the Management Portal navigation bar, choose **Provisioning > Auxiliary Codes**.
- Step 2** Click the ellipsis icon beside the idle or wrap-up code that you want to edit and click **Edit**.
- Step 3** Enter the following details and click **Save**.

Setting	Description
Name	Enter the code name.
Description	(Optional) Enter a description of the code.
Is Default	<p>Click Yes or No to indicate whether this code is the default code.</p> <ul style="list-style-type: none"> If this code is the first idle or wrap-up code that you create, you must make it the default code. You can modify it later after you create other codes. <p>You must include the default idle and wrap-up codes in agent profiles. For more information, see Agent Profiles, on page 37.</p> <ul style="list-style-type: none"> The system uses the default wrap-up code when the profile of the agent specifies Auto Wrap Up. These agents do not enter wrap-up codes. Instead, they automatically go into the Available state after completing an incoming call and automatically go into the Idle state after making an outdial call. The system uses the default idle code when the agent profile has Auto Wrap enabled.
Is System Auxiliary Code	Click Yes or No to indicate whether this code is the system code. The multimedia subsystem uses the System auxiliary codes.
Work Type	Select the work type that you want to associate with this code.

Delete Idle or Wrap-up Codes

You cannot delete the idle or wrap-up code that is set as default. A message informs you that you cannot suspend or delete the default aux-code if you try to delete it. You must set another idle or wrap-up code to

default before deleting the chosen wrap-up or idle code. See [Edit Idle or Wrap-Up Codes, on page 36](#) to change the default setting.

Procedure

Step 1 From the Management Portal navigation bar, choose **Provisioning > Auxiliary Codes**.

Step 2 Click the ellipsis icon beside the idle or wrap-up code and click **Mark Inactive**.

Step 3 Click **Yes** to confirm.

The status of the idle or wrap-up code changes to Not Active.

Note Once the object is marked inactive, it can be permanently deleted. For more information, see [Delete inactive objects permanently, on page 80](#).

Agent Profiles

An agent profile is a group of permissions and Agent Desktop behaviors that you assign to specific agents. Each agent profile specifies the following permissions and settings:

- Queue Transfer
- Agent Consult and Transfer
- Wrap-up and Idle Codes
- Wrap-up Timeout Values
- Agent Auto Available
- Dialing Capabilities
- Dial Number Capabilities
- Access to the agent personal statistics
- Auto Answer

For reports in the **Agent Personal Statistics** (APS) pane on Agent Desktop, agent profile settings are applied.

Create an Agent Profile

To create an agent profile:

Procedure

Step 1 From the Management Portal navigation bar, choose **Provisioning > Agent Profiles**.

Step 2 Click the **+ New Agent Profile** and enter the following settings:

- [General Information, on page 38](#)

- [Auxiliary Codes](#), on page 38
- [Collaboration](#), on page 39
- [Dial Plan](#), on page 40
- [Agent DN validation](#), on page 41
- [Agent Viewable Statistics](#), on page 42
- [Agent Thresholds](#), on page 43
- [Agent Timeout](#), on page 43

General Information

The **General Information** tab displays the following settings.

Setting	Description
Name	Enter a name for the agent profile. You can create an agent profile from a copy of another agent profile. When you copy a profile, the system renames the copy. The copy name consists of the name of the profile from which the copy is made and the words <i>copy_of</i> appended as a prefix. You can retain the name the system assigned to the file or rename it.
Description	(Optional) Enter a description for the profile.
Status	This setting appears only on the Edit page to indicate if the profile is active. <ul style="list-style-type: none"> • Active: You can assign the profile to an agent. • Not Active: You can't assign the profile to an agent.
Parent Type	Choose a parent type: <ul style="list-style-type: none"> • Tenant: The agent profile is available to all sites at your enterprise. • Site: The agent profile is available to a specific site.
Parent Name	This setting is available if you choose Parent Type as Site. Choose the site for which this agent profile is available.
Screen Popups	Click On or Off to specify whether you want to allow external pop-up screens.

Auxiliary Codes

The **Agent Profile > Auxiliary Codes** page displays settings for the wrap up and idle codes and permissions that are related to wrap up and agent availability.

Setting	Description
Wrap Up Settings	<p>When you click Auto Wrap Up with Time Out Of and enter the time, the system automatically enters the default wrap-up code after an agent completes a conversation. The agent, however, can select a different code within the time period that you specify here.</p> <p>Click Manual Wrap Up if you want the agent to select a wrap-up code after completing a call. No timeout is associated with manual wrap-up.</p>
Agent Available After Outdial	<p>Click On if you want the agent to go into the Available state after completing and wrapping up an outdial call. The agent can also manually choose an Idle state from the STATUS NOW drop-down list before selecting a wrap-up code.</p> <p>Click Off if you want the agent to go into the Idle state after completing and wrapping up an outdial call.</p>
Allow Auto Wrap Up Extension	<p>Click On if you want agents to cancel the auto wrap-up time and extend the wrap-up time.</p> <p>When this option set to On, the system displays the Cancel Auto Wrap Up option when the agent is in auto wrap-up mode.</p>
Wrap Up Codes	<p>Specify the wrap-up codes that the agents can select when they wrap up a contact:</p> <ul style="list-style-type: none"> • Click All to make all wrap-up codes available. • Click Specific to make specific codes available; then choose codes from the drop-down list. To remove a code, click X on the left side of the listed code name. <p>You must add the default wrap-up code in the Selected Codes list. The system uses the default code when you have enabled Auto Wrap Up in the profile of the agent. These agents do not enter wrap-up codes.</p>
Idle Codes	<p>Specify the Idle codes that the agents can select in Agent Desktop:</p> <ul style="list-style-type: none"> • Click All to make all idle codes available. • Click Specific to make specific codes available; then select codes from the drop-down list. To remove a code, click X on the left side of the listed code name. <p>You must add the default idle code in the Selected list. The system uses default codes in the following scenarios:</p> <ul style="list-style-type: none"> • When the agent initially logs in. • After the agent makes an outdial call if you have enabled Auto Wrap Up in the profile of the agent.

Collaboration

The Agent Profile > Collaboration page displays the following settings:

Setting	Description
Entry Point/Queue Transfer Targets	<p>Specify the entry points or queues that the agents can choose from the Queue drop-down list on the Agent Desktop:</p> <ul style="list-style-type: none"> • Click All to make all entry points and queues available. • Click Specific to make specific entry points and queues available; then choose entry points and queues from the drop-down list. • Click None if you do not want to make any entry points or queues available as transfer targets.
Buddy Teams	<p>Specify the teams that the agents can choose from the Agent drop-down list on the Agent Desktop.</p> <p>Agents can consult with, conference with, and transfer calls to the agents from the teams that they choose.</p> <ul style="list-style-type: none"> • Click All to make the agents on all teams available. • Click Specific to make agents on specific teams available; then select teams from the drop-down list. • Click None if you do not want to make any teams available for consultation, conference, or call transfer.
Consult To Queue	<p>Click On if you want the agent to be able to select a queue in the Queue drop-down list as a target for a consultation. The target must be an inbound Webex Contact Center queue.</p> <ul style="list-style-type: none"> • If the agent selects an entry point as the target, the system disables the Consult button. • The system supports Consult to Queue only for queues that have teams serving them. If the agent attempts to consult to a queue that only redirects to another entry point or queue, the system displays a Consult Failed message.

Dial Plan

The **Agent Profile > Dial Plan** page allows you to configure settings related to agent outdialing. The following table describes these settings.

Setting	Description
Outdial Enabled	<p>If you want the agent to be able to make outdial calls, click the Outdial Enabled field to toggle to Yes.</p> <p>If you don't want the agent to make outdial calls, click the Outdial Enabled field to toggle to No. This setting prevents the dial pad from appearing on the Agent Desktop.</p> <p>Note To display the dial pad, you must have an appropriate setup. Contact the full administrator for the setup.</p>

Setting	Description
Outdial Entry Points	If you set Outdial Enabled to Yes , choose an entry point that the agent can use to make outdial calls from the drop-down list in the Outdial Entry Point field.
Address Book	<p>Choose an address book from the drop-down list in the Address Book field. An address book includes the speed-dial numbers that the agent can choose from to make outdial and consult calls.</p> <p>If you set Outdial Enabled to No and you choose an address book, the agent can select a name from the address book for consults and transfers, but can't make outdial calls.</p> <p>Choose None if you don't want to make an address book available to the agent.</p> <p>See Create an Address Book, on page 46 for more information.</p>
Dial Plan Enabled	<p>If you want the agent to be able to make ad-hoc outdial calls, click the Dial Plan Enabled field to toggle to Yes.</p> <p>If you don't want the agent to be able to make ad-hoc outdial calls, click the Dial Plan Enabled field to toggle to No.</p> <p>When the Dial Plan Enabled setting is No, and the Outdial Enabled setting is Yes, the agent can make an outdial call, but only by either selecting an entry from the address book or typing a name from the address book in the Enter number to call field on the dial pad.</p>
Select Dial Plan	<p>This setting appears only if you set Dial Plan Enabled to Yes. Choose one or more dial plans for the system to use to validate the Dial Numbers (DN) that the agent enters in the Enter number to call field.</p> <p>Two default dial plans are available. You can also create custom dial plans for your enterprise. The default dial plans are:</p> <ul style="list-style-type: none"> • US accepts input text such as the following: 18005551234 1-800-555-1234 1 (800) 555-1234 • Any Format accepts input such as the following: 123 5551234 555-1234 1-800-FLOWERS (800) 555-1234 John.Smith
Outdial ANI	This setting appears only if you set Outdial Enabled to Yes . Optionally, from the drop-down list in the Outdial ANI field, choose the name associated with the list of phone numbers that the agent can use to make an outdial call. The system uses the number that the agent uses as the caller ID for the call. For more information, see Create an Outdial ANI, on page 48 .

Agent DN validation

The **Agent Profile > Agent DN Validation** page displays the following settings.

Setting	Description
Validation for Agent DN	<p>Click Unrestricted to allow agents to use any DN to sign in through the Station Credentials prompt on the Agent Desktop.</p> <p>Note If an agent enters an ad-hoc DN and the entry does not meet the sign-in syntax rules, the system rejects the agent sign-in.</p> <p>To restrict the DN that the agent can enter, click one of the following:</p> <ul style="list-style-type: none"> • Provisioned Value restricts the sign-in DN to the default value you provision for the agent. <p>Note: To provision or change an agent's default DN, edit the agent's user settings. Choose Provisioning > User > Edit > Agent Settings and enter a DN in the Default DN field. If you do not provision a DN, the agent can enter any DN to sign in.</p> <ul style="list-style-type: none"> • Validation Criteria (Select from list) restricts the sign-in DN to the one or more dial plans you specify in the Validation Criteria setting.
Validation Criteria	<p>This setting appears only if you set Validation for Agent DN to Validation Criteria.</p> <p>Select the dial plan to use for the DN validation:</p> <ul style="list-style-type: none"> • Click All to validate the DN against all available dial plan formats. • Click Specific to validate the DN against one or more dial plans that you can choose from the Select Validation Criteria drop-down list. For more information, see Dial Plan, on page 40.

Agent Viewable Statistics

The **Agent Profile > Agent Viewable Statistics** page displays the following settings.

Setting	Description
Agent Statistics	Click On or Off to specify whether you want the agents to view their personal statistics in Agent Desktop.
Queue Statistics	<p>This setting controls whether the agent can display statistics for all or some queues in the Agent Personal Statistics tab. Do one of the following:</p> <ul style="list-style-type: none"> • Click All to enable the agent to display statistics for all queues. • Click Specific and then choose the queues from the Select Queues drop-down list to enable the agent to display statistics for specific queues. • Click None to prevent the agent from displaying queue statistics.
Logged-in Team Statistics	<p>Click On or Off to specify whether the agent can view statistics for the team.</p> <p>Note</p> <ul style="list-style-type: none"> • Settings for Logged-in Team Statistics and Team Statistics are independent of each other.

Setting	Description
Team Statistics	<p>This setting controls whether the agent can display statistics for all or some teams in the Agent Personal Statistics tab. Do one of the following:</p> <ul style="list-style-type: none"> • Click All to enable the agent to display statistics for all teams. • Click Specific and then choose the teams from the Select Teams drop-down list to enable the agent to display statistics for specific teams. • Click None to prevent the agent from displaying teams statistics.

Agent Thresholds

The **Agent Thresholds** page appears only if your enterprise uses the Threshold Alerts feature. This page provides settings to specify the alerts that the agent can display in the Agent Personal Statistics tab on the Agent Desktop.



Note This feature is not supported. Enabling or disabling the **Allow Agent Threshold** under tenant settings to show the agent threshold on the agent profile page will be removed in sometime.

If your enterprise uses the Agent Threshold Alerts feature, the page also provides settings to specify the thresholds associated with the agent.

For more information, see [Threshold Rules, on page 66](#).

Setting	Description
Agent Viewable Threshold Alerts	<p>Choose rules from the drop-down list to specify the alerts that you want the agent to receive.</p> <p>When an agent breaches a threshold rule, the system generates an alert and displays it in the Agent Personal Statistics tab in Agent Desktop.</p>
Enable Agent Threshold Alerts	<p>Click On or Off to specify whether you want the agent and the supervisor to receive alerts when the agent breaches specified threshold rules.</p> <p>If the agent breaches a selected rule, the system generates the alert and displays it in the Agent Threshold Alerts section of the Agent Personal Statistics tab. The supervisor also receives the alert in their Webex Contact Center Management Portal.</p>
Threshold Alerts	<p>This is available if you enable threshold alerts. If agent viewable threshold alerts are available, choose the rules for triggering the alerts from the drop-down list.</p>

Agent Timeout

Agent Timeout enables you to automatically sign out an agent from the desktop after being idle for the specified time.

Setting	Description
---------	-------------

Desktop Inactivity Timeout	<p>Choose an idle timeout setting for an agent from the following options:</p> <p>Default Value: Select this to inherit the values given in Timeout Settings at the tenant level configuration.</p> <p>Custom Value: Type the value in minutes to set the idle timeout. Enter any value from 3 to 10,000 minutes in the text box. This overrides the value given in Timeout Settings at the tenant level configuration.</p>
----------------------------	---

View the Details of an Agent Profile

Procedure

- Step 1** From the Management Portal navigation bar, choose **Provisioning > Agent Profiles**.
- Step 2** Click the ellipsis icon beside the agent profile you want to view and click **View**. You can view the following details:
- [General Information, on page 38](#)
 - [Auxiliary Codes, on page 38](#)
 - [Collaboration, on page 39](#)
 - [Dial Plan, on page 40](#)
 - [Agent DN validation, on page 41](#)
 - [Agent Viewable Statistics, on page 42](#)
 - [Agent Thresholds, on page 43](#)
 - [Agent Timeout, on page 43](#)
- Step 3** (Optional) Click **Edit** in each tab to edit the settings.
-

Edit an Agent Profile

Procedure

- Step 1** From the Webex Contact Center Portal navigation bar, choose **Provisioning**.
- Step 2** Choose **Agent Profiles**.
- The Agent Profiles page appears. This page displays a list of agent profiles.
- Step 3** Click the ellipsis icon beside the agent profile you want to edit and click **Edit**. You can edit the following details:
- [General Information, on page 38](#)

- [Auxiliary Codes, on page 38](#)
 - [Collaboration, on page 39](#)
 - [Dial Plan, on page 40](#)
 - [Agent DN validation, on page 41](#)
 - [Agent Viewable Statistics, on page 42](#)
 - [Agent Thresholds, on page 43](#)
 - [Agent Timeout, on page 43](#)
-

Copy an Agent Profile

Procedure

- Step 1** From the Management Portal navigation bar, choose , **Provisioning** > **Agent Profiles**.
- Step 2** Click the ellipsis icon beside the agent profile you want to copy and click **Copy**. You can edit the following details in the copied agent profile:
- [General Information, on page 38](#)
 - [Auxiliary Codes, on page 38](#)
 - [Collaboration, on page 39](#)
 - [Dial Plan, on page 40](#)
 - [Agent DN validation, on page 41](#)
 - [Agent Viewable Statistics, on page 42](#)
 - [Agent Thresholds, on page 43](#)
 - [Agent Timeout, on page 43](#)
- Step 3** (Optional) Click **Edit** in each tab to edit the settings.
-

Deactivate an Agent Profile

You cannot deactivate an agent profile if you associate it with any other entities such as, dial numbers or any other routing strategy. When you try to deactivate these agent profiles, you get an error message. Click the information icon at the end of the message to view the list of all the associated entities.

After you deactivate an agent profile, you can still see it in the Agent Profiles page as Not Active. Historical reports also display details of the deactivated agent profile.

Procedure

Step 1 From the Management Portal navigation bar, choose **Provisioning > Agent Profiles**.

Step 2 Click the ellipsis icon beside an agent profile and click **Mark Inactive**.

Step 3 Click **Yes** to confirm.
The status of the agent profile changes to Not Active.

Note Once the object is marked inactive, it can be permanently deleted. For more information, see [Delete inactive objects permanently, on page 80](#).

Activate an Agent Profile

To activate an agent profile:

Procedure

Step 1 From the From the Management Portal navigation bar, choose **Provisioning > Agent Profiles**.

Step 2 Click the ellipsis icon beside an agent profile with the status Not Active and click **Restore**.

Step 3 Click **Yes** to confirm.
The status of the agent profile changes to **Active**.

Address Books

Address books contain entries with phone numbers. Instead of entering a number manually when starting a call, agents can use the address book to select an entry to dial. Agents can access an address book after you add it to their Agent Profile. For more information, see [Dial Plan, on page 40](#) in [Agent Profiles, on page 37](#).

You can create address books that are available to all sites or only to a specific site. The value of Maximum Address Books in the tenant settings of your enterprise determines the number of address books that you can create. For more information, see [Tenant Settings, on page 1](#).

Create an Address Book

To create a new address book:

Procedure

Step 1 From the Management Portal navigation bar, choose **Provisioning > Address Book**.

Step 2 Click **+ New Address Book**.

Step 3 Enter the following details and click **Save**.

Setting	Description
Name	Enter a name for the address book.
Description	(Optional) Enter a description for the address book.
Parent Type	Select a parent type: <ul style="list-style-type: none"> • Tenant: The address book is available to all sites at your enterprise. • Site: The address book is only available for a specific site.
Parent Name	Select the site for the address book to be available. This field is available only if you select the Parent Type as Site.

Step 4 (Optional) In the Entry List, click the + icon to add new entries in the address book.

Step 5 In the **Add Address Book** dialog box, enter the following details:

Setting	Description
Name	Enter the name of the entry.
Phone Number	Enter the phone number for the entry.

Note The maximum number of entries in an Address Book is 150.

Edit an Address Book

You can edit the general settings and the entries of an address book.

Procedure

Step 1 From the From the Management Portal navigation bar, choose **Provisioning > Address Book**.

Step 2 Click the ellipsis button beside the address book that you want to edit and click **Edit**.

You can edit the following fields in the General Settings tab:

Setting	Description
Name	Edit the name of the address book.
Description	Edit the description of the address book.
Parent Name	Edit the site for the address book. This field is available only if the parent type is Site.

Step 3 In the **Entry List** section, under the **Action** column, click the edit button to edit an entry.

Step 4 You can edit the following in the **Edit Address Book** dialog box:

Setting	Description
Name	Edit the name of the entry.
Phone Number	Edit the phone number of the entry.

Step 5 (Optional) In the **Entry List** section, under the **Action** column, click **Delete** to delete an entry.

Step 6 (Optional) Click the + icon to add a new entry to the entry list.

Step 7 Click **Save**.

Delete an Address Book

You cannot delete an address book if you associate it with any other entities such as, agent profile. When you try to delete these address books, you get an error message. Click the information icon at the end of the message to view the list of all the associated entities.

Procedure

Step 1 From the Management Portal navigation bar, choose **Provisioning > Address Book**.

Step 2 Click the ellipsis icon beside the address book that you want to delete and click **Delete**.

Step 3 Click **Yes** to confirm.

Outdial Automatic Number Identification (ANI)

The Outdial Automatic Number Identification (ANI) feature allows an agent to select a phone number as the caller ID for an outdial call.

To make an outdial ANI list available to an agent, add the outdial ANI list to an agent profile, and assign the profile to the agent. For more information, see [Agent Profiles, on page 37](#).

Create an Outdial ANI

To create an outdial ANI:

Procedure

Step 1 From the Management Portal navigation bar, choose **Provisioning > Outdial ANI**.

Step 2 Click **+ New Outdial ANI**.

Step 3 Enter the following details in the **General Settings** section:

Field	Description
Name	Enter a name for the outdial ANI.
Description	(Optional) Enter a description for the outdial ANI.

Note The **Name** and **Description** fields allow alphanumeric characters, space, hyphen (-), and underscore (_).

Step 4 Click the + icon in the **Outdial ANI Entry List** section to add a new outdial ANI entry.

Step 5 Enter the following details in the **Add Outdial ANI** dialog:

Field	Description
Name	Enter a name for the outdial ANI entry. The field allows alphanumeric characters, space, hyphen (-), and underscore (_).
Number	Enter a valid phone number or valid SIP URI.

Step 6 Repeat Step 5 and Step 6 to add another outdial ANI entry to the list.

Step 7 Click **Save**.

Newly added entries are in the **Outdial ANI Entry List** section.

Edit an Outdial ANI

To edit an outdial ANI:

Procedure

Step 1 From the Management Portal navigation bar, choose **Provisioning > Outdial ANI**.

Step 2 Click the ellipsis icon beside the outdial ANI that you want to edit and click **Edit**.

Step 3 You can edit the following:

- **General Settings** section—Edit the **Name** or **Description** of the outdial ANI.
- **Outdial ANI Entry List** section—Edit the name or dial number of an outdial ANI entry.
 - a. In the **Action** column, click the **Edit** icon next to an entry.
 - b. Edit the outdial ANI entry **Name** or **Number**.
 - c. (Optional) To delete an entry, click the corresponding **Delete** icon in the **Action** column.
Click **Yes** to the prompt message to confirm the deletion.

Step 4 Click **Save**.

Delete an Outdial ANI



Note You cannot delete an outdial ANI if you have associated it with any entity, for example, an agent profile.

To delete an outdial ANI:

Procedure

- Step 1** From the Management Portal navigation bar, choose **Provisioning > Outdial ANI**.
- Step 2** Click the ellipsis icon beside the outdial ANI that you want to delete and click **Delete**.
- Step 3** Click **Yes** to confirm.
-

Dial Plans

The **Dial Plan** page allows you to define validation criteria for the:

- Dial Number (DN) that an agent uses to sign in to the Agent Desktop.
- DN that an agent uses for outdialing.

If you satisfy the validation prerequisites, the system validates DNs that agents enter in the Desktop environment against the syntax rules that are defined in one or more dial plans. The following table describes the validation prerequisites.

DN usage	Validation prerequisites
Agent Desktop sign-in	Configure Agent Profile > Agent DN Validation as follows: <ul style="list-style-type: none"> • Set Validation for Agent DN to Validation Criteria (Select from list). • Set Validation Criteria field to Specific. • Choose a dial plan from the drop-down list in the Select Validation Criteria field. Default dial plans and any dial plan you create appear in this list.

DN usage	Validation prerequisites
Outdial calls	Configure Agent Profile > Dial Plan as follows: <ul style="list-style-type: none"> • Set Outdial Enabled to Yes. • Set Dial Plan Enabled to Yes. • Choose a dial plan from the drop-down list in the Select Dial Plan field. Default dial plans and any dial plan you create appear in this list. <p>Note Note: Agents use the Desktop dial pad to make outbound calls. To display the dial pad, you must have the correct setup. Contact your administrator for the setup.</p>



Note If you allow agents to enter DNs without requiring validation and their entries don't comply with valid syntax, the Desktop rejects sign-ins and outbound calls fail.

You can choose from two default dial plans and create new dial plans. The default dial plans are:

- **US**
- **Any Format**

The default **US** dial plan accepts entries such as:

- 1-800-555-1234
- 1 (800) 555-1234
- 18005551234
- 18005551234,,222

In this example, commas indicate pauses before entry of an extension number.

The default **Any Format** dial plan accepts entries such as:

- 123
- 5551234
- 555-1234
- 8005551234
- 1800FLOWERS
- bruce.matthews



Note You can use the **Any Format** dial plan to validate a DN, the first part of an email address, or a Session Initiation Protocol (SIP) uniform resource identifier (URI).

All dial plans require a regular expression for the system to recognize what defines a valid entry. The regular expression comprises the syntax rules that the system uses to interpret what is valid.

You can create separate dial plans with appropriate regular expressions to specify the required syntax for the:

- DN that an agent uses to sign in to the Desktop **Station Credentials** pop-up window.
- DN an agent enters in the **Enter number to call** field of the Desktop dial pad.

Optionally, you can specify a prefix and characters that the system must strip from the entry in the dial pad.

The regular expressions of the default dial plans are described in the following sections. You can refer to the syntax rules that are described in these sections to guide you in formulating regular expressions for the dial plans you create.

- [Regular expression for the default US dial plan, on page 52](#)
- [Regular expression for the default Any Format dial plan, on page 53](#)

For an outdial call, the system performs the following steps to determine the validity of an entry an agent makes in the **Enter number to call** field of the Desktop dial pad:

1. Strip the characters specified in the dial plan's **Stripped Characters** field from the entry in the **Enter number to call** field.



Note In the default **US** and **Any Format** dial plans, the specified **Stripped Characters** are left parenthesis, right parenthesis, space, and hyphen.

2. Validate the resulting entry according to the criteria defined in the regular expression of the chosen dial plan. If the entry meets the criteria, it's deemed valid.
3. If the entry is invalid, prepend the entry that is specified in the **Prefix** field.



Note In the **US** dial plan, the specified prefix is number 1.

4. Validate the resulting entry according to the defined regular expression again.

Regular expression for the default US dial plan

The regular expression that is specified for the **US** dial plan is:

```
1[0-9]{3}[2-9][0-9]{6}([,]{1,10}[0-9]+){0,1}
```

Following is a description of what this regular expression specifies.

- The first digit must be 1.
- Three digits in the range of 0–9 must follow.
 {3} means 3 digits in the preceding range [0-9]
- One digit in the range of 2-9 must follow.

- Six digits in the range of 0-9 must follow.
 {6} means six digits in the preceding range [0-9]
- Zero or one occurrence of the following sequence can follow: between one and ten commas [,] followed by one or more digits [0-9].
 {1,10} means one to ten pauses as specified by one comma [,] per pause
 + means one or more digits in the preceding range [0-9]
 {0,1} means zero or one occurrence of the sequence of pauses [,] followed by one or more digits in the preceding range [0-9]

Regular expression for the default Any Format dial plan

The regular expression that is specified for the **Any Format** dial plan is:

```
(([0-9a-zA-Z]+[-._])*[0-9a-zA-Z]+
```

Following is a description of what this regular expression specifies.

- The dial pad entry can start with zero or more sets of the following sequence:
 one or more alphanumeric characters [0-9a-zA-Z] followed by one hyphen, period, or underscore [-._].
 - + means one or more alphanumeric characters in the preceding range [0-9a-zA-Z]
 - * means zero or more of the preceding sequence of alphanumeric characters [0-9a-zA-Z] followed by one hyphen, period, or underscore [-._].
- One or more alphanumeric characters [0-9a-zA-Z] must follow.

Create a Dial Plan

Before you begin

You require Administrator privileges to complete this procedure.

Procedure

-
- Step 1** From the Management Portal navigation bar, choose **Provisioning > Dial Plan**.
 The **Dial Plan** page appears. This page displays a list of existing dial plans.
- Step 2** Click **+ New Dial Plan**.
- Step 3** Configure the following settings.

Setting	Description
Name	Enter a name for the Dial Plan . You can assign one or more dial plans to an agent when you create or edit the agent's profile, and when you configure Agent DN validation .

Setting	Description
Regular Expression	<p>Enter a regular expression. The regular expression comprises the valid syntax for dial numbers (DN) the agent enters in the Desktop environment. Each dial plan requires a regular expression.</p> <p>For examples of the regular expressions of the default dial plans, see the following sections. Use the examples shown in these sections to formulate regular expressions for the dial plans you create.</p> <ul style="list-style-type: none"> • Regular expression for the default US dial plan, on page 52 • Regular expression for the default Any Format dial plan, on page 53
Prefix	<p>(Optional) Enter a prefix that the system automatically adds to the phone number that the agent enters. For example, enter the digit 1 for long-distance calls within the United States.</p> <p>The system adds a prefix only if the agent does not add it when entering a DN in the Desktop environment.</p>
Stripped Character	<p>Enter the characters that the system removes from the DN that an agent enters in the Desktop environment.</p> <p>The system automatically removes the following characters from the number that an agent enters: left and right parentheses, space, and hyphen.</p>

Step 4 Click **Save**.

Edit a Dial Plan

Before you begin

You require Administrator privileges to complete this procedure.

Procedure

Step 1 From the Management Portal navigation bar, choose **Provisioning > Dial Plan**.

The **Dial Plan** page appears. This page displays a list of existing dial plans.

Step 2 Click the ellipsis icon beside the dial plan you want to edit and choose **Edit**.

The **Edit Dial Plan** page appears.

Step 3 You can edit the settings described in the following table. When you are done editing, click **Save**.

Setting	Description
Name	Edit the name of the Dial Plan .

Setting	Description
Regular Expression	Edit the Regular Expression . The regular expression comprises the valid syntax for dial numbers (DN) the agent enters in the Desktop environment. Each dial plan requires a regular expression.
Prefix	Enter a DN in the Desktop environment.
Stripped Character	Edit the Stripped Character . The system automatically removes the following characters from the number that the agent enters: left and right parentheses, space, and hyphen.

Delete a Dial Plan

Before you begin

- You require Administrator privileges to complete this procedure.
- Before deleting a dial plan, ensure that it isn't provisioned for an agent profile or used to validate an agent's sign-in Dial Number (DN). If you can't delete a dial plan, contact your Full Administrator.

Procedure

- Step 1** From the Management Portal navigation bar, choose **Provisioning > Dial Plan**.
The **Dial Plan** page appears. This page displays a list of all existing dial plans.
- Step 2** Click the ellipsis icon beside the dial plan you want to delete and choose **Delete**.
The Heads Up! dialog box appears.
- Step 3** Click **Yes** to confirm.

Call-Associated Data Variables

You define Call-associated data (CAD) variables using the Provisioning module for use in call control scripts to collect one of the following types of data values:

- Caller-entered data: The data that the customer enters using IVR during a call, such as the account number.
- Agent-entered data: The data the agent enters, such as a case number or any action code.

The system stores the CAD values in the cumulative call detail records (CCDRs). Webex Contact Center Management Portal users can display and export to Excel or .csv files. Note the following:

- The system stores a CAD variable that is used in a call control script only if the variable name matches the name of an active CAD variable that the organization administrator provisions for your enterprise. You can view a list of the CAD variables used in a call control script in the Call Control section of the Create Routing Strategy or Edit Routing Strategy page. For more information, see [Assigning Call Control Scripts and Parameters](#).
- The system saves an agent-entered CAD value after the agent completes the Wrap-up state for that call. If due to some reason Agent Desktop connectivity is lost, the system does not store the CAD value that is entered by the agent. When an agent transfers a call, then the CAD variable that the last agent enters is saved.

Note that:

- CAD variable values are visible to all individuals who have access to historical records on the Management Portal. You should not store secure data such as credit card numbers, PINs, and social security numbers should not be stored through use of CAD variables.
- The system stores the CAD data subject to network availability and other operation considerations. CAD variables provide reference data only, and are not intended to provide Customer Relationship Management (CRM) functionality.

You cannot delete a CAD variable, but can deactivate it. You cannot use an inactive CAD variable to store data.

Your organization administrator provisions the maximum number of CAD variables that you can define. For more information, see [Tenant Settings, on page 1](#).

Create a CAD Variable

To create a CAD variable:

Procedure

- Step 1** From the Webex Contact Center Portal navigation bar, choose **Provisioning**
- Step 2** Choose **CAD Variables**.
The CAD Variables page appears. This page displays a list of CAD Variables.
- Step 3** Click **+ New CAD Variable**.
The CAD Variable page appears.
- Step 4** Enter the following details and click **Save**.

Setting	Description
Name	<p>Enter a name for the CAD variable. The name can include alphanumeric characters and the following characters:</p> <ul style="list-style-type: none"> • hyphen (-) • underscore (_) • space character <p>The name cannot begin with space and cannot include two or more hyphens, underscores, or spaces in a row. You cannot edit the name later.</p>
Description	(Optional) Enter a description of the CAD variable.
Agent Editable	Select Yes or No to specify whether agents can edit the value of the variables from the Webex Contact Center Agent Desktop.
Status	Select the status of the CAD variable.

Edit a CAD Variable

To edit a CAD variable:

Procedure

- Step 1** From the Webex Contact Center Portal navigation bar, choose **Provisioning**
- Step 2** Choose **CAD Variables**.
The CAD Variables page appears. This page displays a list of CAD Variables.
- Step 3** Click the ellipsis icon beside any CAD variable and click **Edit**.
The CAD variable appears.
- Step 4** You can edit the following details and click **Save**.

Setting	Description
Description	(Optional) Edit the description of the CAD variable.
Agent Editable	Edit the settings to specify whether the agents can edit the value of the variable from the Webex Contact Center Agent Desktop.

Setting	Description
Status	Edit the status of the variable.

Multimedia Profiles

If your administrator enables multimedia for your enterprise, you can assign each agent with a multimedia profile. Each profile specifies the number of each type of media, such as email, chat, or telephone, that the agent can handle simultaneously.

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

All of the teams under a site have the same multimedia profile as that of the site, unless you assign a different profile to the teams. Similarly, all of the agents under the teams have the same profile as that of the team, unless you change the profile for the agents.

Create a Multimedia Profile

To configure a multimedia profile:

Procedure

Step 1 From the Management Portal navigation bar, choose **Provisioning > Multimedia Profiles**

Step 2 Click **+ New Multimedia Profile**.

Step 3 Do the following:

a) In the **Profile Details** area, enter the following details:

Setting	Description
Name	Enter a name for the multimedia profile.

b) In the **Media Details** area, enter the following details:

Setting	Description
Profile Details	
Allow agents to handle multiple realtime interactions simultaneously	If set to Yes, you can route multiple realtime contacts to the agent at the same time. If set to No, you can route only one realtime contact to the agent at a time. For example, the agent can't receive a chat contact while handling a voice contact.
Status	Displayed in the View and Edit pages to specify whether the profile is Active or Not Active.

Step 4 Click **Save**.

View the Details of a Multimedia Profile

To view the details of a multimedia profile:

Procedure

Step 1 From the Webex Contact Center Portal navigation bar, choose **Provisioning**.

Step 2 Click the ellipsis icon beside a multimedia profile and click **View**.

a) In the **Profile Details** area, view the following information about the multimedia profile:

Setting	Description
Name	The name of the multimedia profile.
Description	The description of the profile.
Status	The status of the multimedia profile. The status can be either Active or Inactive .

b) In the **Media Details** area, view the following information about the multimedia profile:

Setting	Description
Voice	Displays the number of contacts for the voice channel.
Chat	Displays the number of contacts for the chat channel.
Email	Displays the number of contacts for the email channel.

Note You can define the maximum number of media types in Maximum Channels Per Profile in the Module Permissions page of the tenant settings for your enterprise. For more information, see [Tenant Settings, on page 1](#).

Setting	Description
Profile Details	
Name	Shows name for the multimedia profile.
Description	(Optional) Shows description for the profile.
Media Details	
Blended	Shows configured contacts to simultaneously handle different channel types.

Setting	Description
Blended Real-time	Shows configured contacts to simultaneously handle different real-time and non real-time channel types.
Exclusive	Shows configured contacts to handle one channel types at a time.

Step 3 (Optional) Click **Edit** to change the settings. For more information, see [Edit a Multimedia Profile, on page 60](#).

Step 4 (Optional) Click **Delete** to deactivate the settings. For more information, see [Deactivate a Multimedia Profile, on page 61](#).

Edit a Multimedia Profile

To edit a multimedia profile:

Procedure

Step 1 From the Management Portal navigation bar, choose **Provisioning > Multimedia Profiles**.

Step 2 Click the ellipsis icon beside a multimedia profile and click **Edit**.

Step 3 Do the following:

a) In the **Profile Details** area, edit the following details:

Setting	Description
Name	Enter a name for the multimedia profile.

b) In the **Media Details** area, edit the following details:

Setting	Description
Profile Details	
Allow agents to handle multiple realtime interactions simultaneously	If set to Yes , you can route multiple realtime contacts to the agent at the same time. If set to No , you can route only one realtime contact to the agent at a time. For example, the agent can't receive a chat contact while handling a voice contact.
Status	Displayed in the View and Edit pages to specify if the profile is Active .

Step 4 Click **Save**.

Deactivate a Multimedia Profile



Note You cannot deactivate a multimedia profile if you associate it with any entity.

To delete a multimedia profile:

Procedure

- Step 1** From the Management Portal navigation bar, choose **Provisioning > Multimedia Profiles**.
- Step 2** Click the ellipsis icon beside the multimedia profile that you want to deactivate, and click **Mark Inactive**.
- Step 3** Click **Yes** to confirm.
The status of the multimedia profile changes to **Not Active**.

Note Once the object is marked inactive, it can be permanently deleted. For more information, see [Delete inactive objects permanently, on page 80](#).

Activate a Multimedia Profile

Procedure

- Step 1** From the Management Portal navigation bar, choose **Provisioning > Multimedia Profiles**.
- Step 2** Click the ellipsis icon beside a multimedia profile with the status **Not Active** and click **Restore**.
- Step 3** Click **Yes** to confirm.
The status of the multimedia profile changes to **Active**.
-

Skill Definitions

Skills-based routing is an optional Webex Contact Center feature that enables you to assign skill requirements, such as language fluency or product expertise, to incoming calls so they can be distributed to agents with a matching set of skills.

The Skill Definitions page provides an interface for viewing, creating, and editing the skills that can be assigned to calls and to skill profiles, which can then be assigned to teams or individual agents. For more information, see [Skill Profiles, on page 64](#).

The maximum number of active skills that you can create is determined by the Maximum Skills and Maximum Text Skills values provisioned for your enterprise. For more information, see [Tenant Settings, on page 1](#).

Create a Skill Definition

Procedure

Step 1 On the Portal navigation bar, choose **Provisioning > Skills > Skill Definition**.

Step 2 On the Skill Definitions page, click + **New Skill Definition**.

Step 3 Specify the skill settings as described in this table.

Setting	Description
Name	Enter a name for the skill.
Description	Optionally, enter a description of the skill.
Service Level Threshold	Specify how many seconds a customer call can be in queue for this skill before being flagged as outside the service level. If a call is completed within this time interval, it is considered to have been handled within service level for this skill.
Type	<p>If you are creating a new skill, specify the skill type:</p> <ul style="list-style-type: none"> • Text: A free-form text skill that must be matched exactly. For example, you might define a skill named Extension that will let you route a call to a specific agent's extension number based on digits entered by the caller in response to a prompt. The text value can include up to 40 characters, including spaces. • Proficiency: Can have a value ranging from 0 to 10 that represents the agent's level of expertise in the skill. For example, you might define a skill for each language that your agents speak. • Boolean: Can have the value of True or False to indicate whether or not the agent has the skill. For example, you might define a skill named PremierService to ensure that your most valuable customers get the best service. Your most experienced agents can be assigned a value of True, and your least experienced agents can be assigned a value of False • Enum: A named set of predefined values. For example, a skill named Line of Business might have a set of three values: Sales, Service, and Billing. Each value can include up to 20 characters, including spaces. <p>Note You can't change the skill type later.</p>
Status	Select Active or Not Active . You can't inactivate a skill, if it is used in a skill profile or a routing strategy.

Step 4 Click **Save**.

Step 5 To reset the settings in all fields, click **Reset**.

Edit a Skill Definition

Procedure

To view and edit a skill definition:

- Step 1** On the Management Portal navigation bar, choose **Provisioning > Skills > Skill Definition**.
- Step 2** Click the ellipsis icon beside the listed skill and click **Edit**.
- Step 3** Edit the skill settings as described in this table.

Setting	Description
Name	Displays the name of the skill. You can't edit the name of the skill.
Description	Optionally, enter a description of the skill.
Service Level Threshold	Specify how many seconds a customer call can be in the queue for this skill before being flagged as outside the service level. If a call is completed within this time interval, it is considered to have been handled within the service level for this skill.
Type	Displays the skill type. You can't edit the skill type.
List Values	<p>This field is displayed only if the skill type is enum. Specify the values that can be associated with this skill. For example, for an enum skill named Operating System, you might define three values: Windows, Linux, and Unix. Each value is limited to a maximum length of 20 characters, including spaces.</p> <ul style="list-style-type: none"> • To add a value, type the value name in the List Value field and then press Enter. Repeat for each value you want to add. • To delete a value, click x on the value entry.
Status	Select Active or Not Active . You can't inactivate a skill, if it is used in a skill profile or a routing strategy.

- Step 4** Click **Save**.

Deactivate a Skill Definition

Procedure

- Step 1** On the Management Portal navigation bar, choose **Provisioning > Skills > Skill Definition**.
- Step 2** Click the ellipsis icon besides the skill that you want to delete and click **Mark Inactive**.
- Step 3** Click **Yes** to confirm.

Note Once the object is marked inactive, it can be permanently deleted. For more information, see [Delete inactive objects permanently, on page 80](#).

Activate a Skill Definition

Procedure

-
- Step 1** On the Management Portal navigation bar, choose **Provisioning > Skills > Skill Definition**.
- Step 2** Click the ellipsis icon beside a skill with the status **Not Active** and click **Restore**.
- Step 3** Click **Yes** to confirm.
The status of the skill changes to **Active**.
-

Skill Profiles

A skill profile is a set of skills, each with an assigned value, that you assign to an agent-based team or to an individual agent. For example, you can assign a skill of English a high level of proficiency in one skill profile and a lower level in another profile.

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



-
- Note**
- As an administrator, you can update the skill profile of agents. These changes are applied to all relevant agents without the need for these agents to sign out and sign back in to the Agent Desktop.
 - The number of agents who share the same skill profile is limited to 500 to ensure effective performance of the system. You can assign the skill profile to the agent directly or to a team (Choose **Provisioning > Skills > Skill Profiles**). When you add an agent to a team, the agent is assigned the team's skill profile.
-

Create a Skill Profile

Procedure

-
- Step 1** On the Management Portal navigation bar, choose **Provisioning > Skills > Skill Profiles**.
- Step 2** On the Skill Profiles page, click + **New Skill Profile**.
- Step 3** Enter the name of the skill profile and description.
- Step 4** Select the active skills you want to assign from the Active skills list.
- Step 5** Provide the appropriate skill value. For more information, see [Create a Skill Definition](#).

- Step 6** Click **Save** to save the skill profile.
 - Step 7** (Optional) Click **Reset** to reset the values in all fields.
-

Edit a Skill Profile

Procedure

- Step 1** On the Management Portal navigation bar, choose **Provisioning > Skills > Skill Profiles**.
 - Step 2** Click the ellipsis icon beside the skill profile and click **Edit**.
 - Step 3** Edit the name, description, and active skills.
 - Step 4** Click **Save** to save the skill profile.
-

Copy a Skill Profile

Procedure

- Step 1** On the Management Portal navigation bar, choose **Provisioning > Skills > Skill Profiles**.
 - Step 2** Click the ellipsis icon beside a skill profile and click **Copy**.
 - Step 3** Edit the necessary details.
 - Step 4** Click **Save** to save the skill profile.
-

Deactivate a Skill Profile

Procedure

- Step 1** On the Management Portal navigation bar, choose **Provisioning > Skills > Skill Profiles**.
 - Step 2** Click the ellipsis icon beside the skill profile that you want to delete and choose **Delete**.
 - Step 3** Click **Yes** to confirm.
-

Activate a Skill Profile

Procedure

-
- Step 1** On the Management Portal navigation bar, choose **Provisioning > Skills > Skill Profiles**.
- Step 2** Click the ellipsis icon beside a skill profile with the status **Not Active** and click **Restore**.
- Step 3** Click **Yes** to confirm.
The status of the skill profile changes to **Active**.
-

Threshold Rules

If your enterprise uses the Threshold Alerts feature, authorized users can create threshold rules to monitor agent and call data.

Call Metrics

You can configure threshold rules for call metrics. For each rule, specify a value that triggers the alert. Configure call metrics as described in this table.

Table 1: Call Metrics

Metric	Entity Type	Trigger Value Type
Abandoned Calls	Queue	Count
Average Queue Time	Queue	Duration
Average Speed of Answer	Queue	Duration
Blind Transferred Calls	Queue	Count
IVR Calls	Entry Point	Count
Longest Time in Queue	Queue	Duration
Number of Calls in Queue	Queue	Count
Overflow Calls	Queue	Count
Service Level Threshold	Queue	Percentage
Short Calls	Entry Point	Count
Transferred Calls	Queue	Count

Agent Metrics

You can configure threshold rules for agent metrics. For each rule, specify a value that triggers the alert. Configure agent metrics as described in this table.

Table 2: Agent Metrics

Metric	Entity Type	Trigger Value Type
Available Agents	Site or Team	Count
Connected Agents	Site or Team	Count
Current Available Time	Agent	Duration
Current Connected Time	Agent	Duration
Current Hold Time	Agent	Duration
Current Idle Time	Agent	Duration
Current Wrap-up Time	Agent	Duration
IB Average Handle Time	Site or Team	Duration
Idle Agents	Site or Team	Count
Not Responding Agents	Site or Team	Count
Number of Agents in Outdial	Site or Team	Count
Number of Logged in Agents	Site or Team	Count
OB Average Handle Time	Site or Team	Duration
Occupancy	Site or Team	Percentage
Total Available Time	Agent	Duration
Total Idle Time	Agent	Duration

By default, the maximum number of threshold rules that are allowed for a tenant is 50. To increase this to a higher limit, contact Cisco Support.

Create a Threshold Rule

A threshold alert is displayed in the Agent Performance Statistics report on the Agent Desktop if you set **Agent Viewable** to **Yes** for the threshold rule and select the threshold alert in the agent profile. For more information, see [Agent Profiles, on page 37](#).

Procedure

-
- Step 1** From the Management Portal navigation bar, choose **Provisioning > Threshold Rules**.

Step 2 On the **Threshold Rules** page:

- Click **+ New Threshold Rule**.
- To delete a threshold rule, click the ellipsis button beside a listed rule and click **Delete**. In the confirmation dialog box, click **OK**.

Step 3 Specify or change the settings for the rule. You can specify or change the following settings in the **General Settings** area:

Setting	Description
Name	Enter a name for the rule.
Description	Enter a short description for the rule.
Agent Viewable	Choose Yes or No to specify whether agents can receive an alert when a threshold rule is breached. If you choose Yes , this rule is available for selection on the Agent Profiles > Agent Thresholds page when you create or edit an agent profile (see Agent Profiles, on page 37).
Entity Type	Choose the entity type to which the threshold rule is applicable: Entry Point, Queue, Site, Team, or Agent (if your enterprise uses the Agent Threshold Alerts feature).
Status	This setting appears on the Edit page to specify whether the threshold rule is Active or Not Active.

You can specify or change the following settings in the **Entity Information** area:

Setting	Description
Metric Type	Specify whether this is an Agent Threshold or a Call Threshold.
Entity	Choose the entry point, queue, site, or team to which the rule is applicable. This setting is not applicable if the entity type is Agent.

You can specify or change the following settings in the **Threshold Information** area:

Setting	Description
Threshold Metric	Choose a value from the drop-down list. The list displays only those metrics that are applicable to the selected entity type.

Setting	Description
Operand	Choose a value from the drop-down list: <ul style="list-style-type: none"> • > (greater than) • >= (greater than or equal to) • < (less than) • <= (less than or equal to) • = (equal to)
Trigger Value	Specify the value that triggers a threshold alert. The value type (duration, count, or percentage) is based on the metric selected. The trigger value must be greater than 0 for all metrics except Available Agents, Connected Agents, Number of Agents in Outdial, and Number of Logged in Agents.
Trigger Interval	Specify the interval, in seconds, during which the system generates only one alert for the threshold rule check.

You can specify or change the following settings in the **Email Information** area:

Setting	Description
Notification Receivers	If you want an individual to receive an email alert in the HTML format when the threshold is triggered, enter the email address in the Notification Receivers field and press Enter. Repeat for each address that you want to add. To remove an address, click x on the left side of the listed address.
Text Notification Receivers	If you want an individual to receive an email alert in the text format when the threshold is triggered, enter the email address in the Text Notification Receivers field and press Enter. Repeat for each address that you want to add. To remove an address, click x on the left side of the listed address.

Step 4 Click **Save**.

Copy a Threshold Rule

Procedure

- Step 1** From the Management Portal navigation bar, choose **Provisioning > Threshold Rules**.
- Step 2** On the **Threshold Rules** page, click the ellipsis button beside a listed rule and click **Copy**.
- Step 3** Specify or change the settings for the rule. You can specify or change the following settings in the **General Settings** area:

Setting	Description
Name	Enter a name for the rule.
Description	Enter a short description for the rule.
Agent Viewable	Choose Yes or No to specify whether agents can receive an alert when a threshold rule is breached. If you choose Yes , this rule is available for selection on the Agent Profiles > Agent Thresholds page when you create or edit an agent profile (see Agent Profiles, on page 37).
Entity Type	Choose the entity type to which the threshold rule is applicable: Entry Point, Queue, Site, Team, or Agent (if your enterprise uses the Agent Threshold Alerts feature).
Status	This setting appears on the Edit page to specify whether the threshold rule is Active or Not Active.

- Step 4** You can specify or change the following settings in the **Entity Information** area:

Setting	Description
Metric Type	Specify whether this is an Agent Threshold or a Call Threshold.
Entity	Choose the entry point, queue, site, or team to which the rule is applicable. This setting is not applicable if the entity type is Agent.

- Step 5** You can specify or change the following settings in the **Threshold Information** area:

Setting	Description
Threshold Metric	Choose a value from the drop-down list. The list displays only those metrics that are applicable to the selected entity type.

Setting	Description
Operand	Choose a value from the drop-down list: <ul style="list-style-type: none"> • > (greater than) • >= (greater than or equal to) • < (less than) • <= (less than or equal to) • = (equal to)
Trigger Value	Specify the value that triggers a threshold alert. The value type (duration, count, or percentage) is based on the metric selected. The trigger value must be greater than 0 for all metrics except Available Agents, Connected Agents, Number of Agents in Outdial, and Number of Logged in Agents.
Trigger Interval	Specify the interval, in seconds, during which the system generates only one alert for the threshold rule check.

Step 6 You can specify or change the following settings in the **Email Information** area:

Setting	Description
Notification Receivers	If you want an individual to receive an email alert in the HTML format when the threshold is triggered, enter the email address in the Notification Receivers field and press Enter. Repeat for each address that you want to add. To remove an address, click x on the left side of the listed address.
Text Notification Receivers	If you want an individual to receive an email alert in the text format when the threshold is triggered, enter the email address in the Text Notification Receivers field and press Enter. Repeat for each address that you want to add. To remove an address, click x on the left side of the listed address.

Step 7 Click **Save**.

Edit a Threshold Rule

Procedure

Step 1 From the Management Portal navigation bar, choose **Provisioning > Threshold Rules**.

Step 2 On the Threshold Rules page:

- To edit the settings for a threshold rule, click the ellipsis icon beside a listed rule and click **Edit**.

Note After you create the Entity Information while creating a Threshold Rule, you cannot edit Metric Type and Entity options in this field.

Step 3 Specify or change the settings for the rule. You can specify or change the following settings in the **General Settings** area:

Setting	Description
Name	Enter a name for the rule.
Description	Enter a short description for the rule.
Agent Viewable	Choose Yes or No to specify whether agents can receive an alert when a threshold rule is breached. If you choose Yes , this rule is available for selection on the Agent Profiles > Agent Thresholds page when you create or edit an agent profile (see Agent Profiles, on page 37).
Entity Type	Choose the entity type to which the threshold rule is applicable: Entry Point, Queue, Site, Team, or Agent (if your enterprise uses the Agent Threshold Alerts feature).
Status	This setting appears on the Edit page to specify whether the threshold rule is Active or Not Active.

Step 4 You can specify or change the following settings in the **Threshold Information** area:

Setting	Description
Threshold Metric	Choose a value from the drop-down list. The list displays only those metrics that are applicable to the selected entity type.

Setting	Description
Operand	Choose a value from the drop-down list: <ul style="list-style-type: none"> • > (greater than) • >= (greater than or equal to) • < (less than) • <= (less than or equal to) • = (equal to)
Trigger Value	Specify the value that triggers a threshold alert. The value type (duration, count, or percentage) is based on the metric selected. The trigger value must be greater than 0 for all metrics except Available Agents, Connected Agents, Number of Agents in Outdial, and Number of Logged in Agents.
Trigger Interval	Specify the interval, in seconds, during which the system generates only one alert for the threshold rule check.

Step 5 You can specify or change the following settings in the **Email Information** area:

Setting	Description
Notification Receivers	If you want an individual to receive an email alert in the HTML format when the threshold is triggered, enter the email address in the Notification Receivers field and press Enter. Repeat for each address that you want to add. To remove an address, click x on the left side of the listed address.
Text Notification Receivers	If you want an individual to receive an email alert in the text format when the threshold is triggered, enter the email address in the Text Notification Receivers field and press Enter. Repeat for each address that you want to add. To remove an address, click x on the left side of the listed address.

Step 6 Click **Save**.

Deactivate a Threshold Rule

Procedure

- Step 1** From the Management Portal navigation bar, choose **Provisioning > Threshold Rules**.
- Step 2** Click the ellipsis icon beside the threshold rule that you want to deactivate and click **Mark Inactive**.
- Step 3** Click **Yes** to confirm.
The status of the threshold rule changes to **Not Active**.

Note Once the object is marked inactive, it can be permanently deleted. For more information, see [Delete inactive objects permanently, on page 80](#).

Activate a Threshold Rule

Procedure

- Step 1** On the Management Portal navigation bar, choose **Provisioning > Threshold Rules**.
- Step 2** Click the ellipsis icon beside a threshold rule with the status **Not Active** and click **Restore**.
- Step 3** Click **Yes** to confirm.
The status of the threshold rule changes to **Active**.
-

Entry Point Mappings

The Entry Point Mappings page is an interface for managing the mappings between entry points and the following:

- Dial Numbers (DN)

By default, all the DN to entry point mappings are listed. If required, you can filter the list by selecting an entry from the **Select Entry Point** drop-down list. The list displays DN, Entry Point, and ID.



- Note** The following points apply if you've a Cisco PSTN add-on:
- The Number Type column displays if the number is a toll number or toll-free number.
 - If your tenant contains any DN that is recognized as toll-free and you do not have Cisco **Bundle 2: Inbound toll-free number access** add-on, then a banner appears saying "Some mappings need to be deleted". Remove the toll-free numbers as the entitlement does not exist.
-

To use an entry point, you must map a dial number to the entry point.

You can also add and remove multiple DN mappings using a .csv file. For more information, see [Bulk Add or Remove Dial Number to Entry Point Mappings, on page 77](#).

Map an Entry Point

To map an entry point:

Procedure

- Step 1** On the Management Portal navigation bar, click **Provisioning > Entry Point Mappings**.
- Step 2** Click **DN to Entry Point Mappings**.
- Step 3** Click **+ New DN to EP Mapping**.
- Step 4** Enter the following fields:

- For DN mapping:

Setting	Description
Available Numbers / DN	<ul style="list-style-type: none"> • For Webex Calling: <p>Select the number that you want to map to this entry point.</p> <p>Note</p> <ul style="list-style-type: none"> • The Webex Calling location main number doesn't appear in this list. If you need to use that main number for mapping, change the main number. For details on managing numbers, see the article Manage Numbers in Locations. • A toll-free number cannot be used for Entry Point mapping without the appropriate entitlement. If the Telephony type is Cisco PSTN and you do not have Cisco Bundle 2: Inbound toll-free number access add-on, use a toll number to map an entry point.
Entry Point	Choose the entry point to which you want to map the DN.
PSTN Region (Only for RTMS voice platform)	<p>Choose a region in which you want to enable regional voice media services. The dial number (DN) must be configured in the selected region to accept incoming calls. The entry point is mapped to the dial number that belongs to the selected region. Mapping the dialed number to a region keeps the voice media local to that region.</p> <p>If you don't choose a region, the Default region is selected. The default region is the data center corresponding to the country of operation that is configured on Control Hub when you provision the contact center tenant.</p> <p>Note The PSTN region is applicable only for the new customers who provision their contact center tenant with the RTMS voice platform and want to use the regional media services.</p>

Step 5 Click **Save**.

Edit Dial Number to Entry Point Mappings

To edit the mapping of a dial number to an entry point:

Procedure

Step 1 From the Management Portal navigation bar, click **Provisioning > Entry Point Mappings**.

Step 2 Choose the appropriate list:

- Dialed Numbers
- Social Messaging

For dial numbers, you can do the following:

- In the **Select Entry Point** drop-down list, search for the dial number that you have mapped to an entry point.
- From the **Select Entry Point** drop-down list, choose **Not Mapped**. All of dial numbers that are not mapped to entry points display. You can then map a dial number to an entry point as required.
- (Optional) To export the dial numbers and the related entry points as a CSV file, click **Export as CSV**.

Step 3 To edit a mapping, click the ellipsis icon beside a dial number , and click **Edit**.

Step 4 Make the edits and click **Save**.

Delete Dial Number to Entry Point Mappings

To delete the mapping of a dial number to an entry point:

Procedure

Step 1 From the Management Portal navigation bar, click **Provisioning > Entry Point Mappings**.

Step 2 Choose the appropriate list:

- Dialed Numbers
- Social Messaging

Step 3 Click **DN to Entry Point Mappings**.

Step 4 Click the ellipsis icon beside the entry that you want to delete and click **Delete**.

Step 5 Click **Yes** to confirm.

Bulk Add or Remove Dial Number to Entry Point Mappings

To add or remove Dial Number to Entry Point mappings in bulk:

Before you begin

Create a CSV file with new-line separated entries and save it in your local system. Each line must include a comma-separated dial number and entry point ID pair. For example:

```
8005551234,AVx90dWsbxpvzWSp3TSo
```

Procedure

- Step 1** From the Webex Contact Center Portal navigation bar, choose **Provisioning**.
- Step 2** Click **DN to Entry Point Mappings** .
The DN to Entry Point Mappings page appears. This page lists all the available mappings.
- Step 3** Click **Bulk Upload**.
- Step 4** Do one of the following:
- **Add New DN Mappings:** To add new dial number and entry point mappings in bulk.
 - **Remove Existing DN Mappings:** To overwrite the existing mappings with new mappings in bulk.
- Step 5** Upload the new CSV file from your local system and click **Upload**.
- Note** The following points apply if you've a Cisco PSTN add-on:
- The Number Type column displays if the number is a toll number or toll-free number.
 - If your tenant contains any DN that is recognized as toll-free and you do not have Cisco **Bundle 2: Inbound toll-free number access** add-on, then a banner appears saying "Some mappings need to be deleted". Remove the toll-free numbers as the entitlement does not exist.
-

Manage Entry Point or Queue Groups

The Entry Point or Queue Group is an interface for creating groups to use with the Map View and Billing Report. After you add an Entry Point or Queue group, you can assign the group to an entry point or a queue.

For more information, see [Create an Entry Point, on page 10](#) and [Create a Queue or an Outdial Queue, on page 13](#).

To view, add, edit, or delete an entry point or queue group:

Procedure

- Step 1** From the Webex Contact Center Portal navigation bar, click **Provisioning**.
- Step 2** Click **Entry Point/Queue Group**.
The Entry Point/Queue Group page appears. The page lists all the entry point or queue groups, if any.

Step 3 You can do the following:

- To add a new group, click the + **New EntryPoint/Queue Group**.
- To edit an existing entry point or queue group, click the button to the left of a group and click **Edit**.
- To delete an existing entry point or queue group, click the button to the left of a group and click **Delete**.
The Heads Up! dialog box appears. Click **Yes** to confirm.

Step 4 If you are adding or editing an entry point or queue group, update the following fields and click **Save**.

Setting	Description
Name	Enter the name of the group.
Type	<p>Select the group type:</p> <ul style="list-style-type: none"> • Billing: The system adds the group to the Billing Group drop-down in the configuration for entry points and queues. • Map: The system adds the group to the Map Group drop-down in the configuration for entry points and queues. <p>For more information, see Create an Entry Point, on page 10 and Create a Queue or an Outdial Queue, on page 13.</p> <p>You cannot change the Type for an existing entry point or queue group.</p>
Status	<p>Select the status of the group.</p> <p>This setting is available when you edit an entry point or a queue group.</p> <p>You cannot deactivate an entry point or queue group if that is the only entry point or queue group for your tenant.</p>

Reports for the Provisioned Items

Use the Management Portal to generate reports about the active resources that the Webex Contact Center administrator provisions for your enterprise. You can view the following reports:

Report	Description
Site Report	<p>The details of the sites for your enterprise.</p> <p>For more information, see About Sites, Teams, Entry Points, and Queues</p>
Team Report	<p>The details of the teams for your enterprise.</p> <p>For more information, see About Sites, Teams, Entry Points, and Queues</p>

Report	Description
Agent Report	<p>The details of the agents for your enterprise.</p> <p>For more information, see Agent Profiles, on page 37.</p>
Inbound EP Report	<p>The details of the entry points for your enterprise.</p> <p>For more information, see Entry Points and Queues, on page 9.</p>
Inbound Queues Report	<p>The details of the queues for your enterprise.</p> <p>For more information, see Entry Points and Queues, on page 9.</p>
Outdial EP Report	<p>The details of the outdial entry points for your enterprise.</p> <p>For more information, see Entry Points and Queues, on page 9.</p>
Outdial Queues Report	<p>The details of the outdial queues for your enterprise.</p> <p>For more information, see Entry Points and Queues, on page 9.</p>
Agent Profile Report	<p>The details of the agent profiles for your enterprise.</p> <p>For more information, see Agent Profiles, on page 37.</p>
Skill Report	<p>The details of the skills that are available for your enterprise.</p> <p>This report is available if your enterprise uses the Skill-Based Routing.</p> <p>For more information on how to define the skills for your enterprise, see Skill Definitions, on page 61.</p> <p>Note Currently we do not support Skill-Based Routing.</p>
Skill Profile Report	<p>The details of the mapping of the skills and the corresponding profiles.</p> <p>This report is available if your enterprise uses the Skill-Based Routing.</p> <p>For more information on how to define the profiles for the skills, see Skill Profiles, on page 64.</p>

Report	Description
Routing Report	<p>The details about the mapping of the routing strategies with the entry points, queues, and teams.</p> <p>For more information on how to define routing strategies, see About Contact Routing.</p>
Agent Skills Report	<p>The details about the agents and their corresponding skills.</p> <p>This report is available if your enterprise uses the Skill-Based Routing.</p> <p>For more information on how to define the skills for your enterprise and Agent profiles, see Skill Definitions, on page 61 and Agent Profiles, on page 37.</p> <p>Note: Currently we do not support Skill-Based Routing.</p>

Manage Reports for the Provisioned Items

To email the report or download the report for any provisioned item:

Procedure

Step 1 From the Management Portal navigation bar, choose **Provisioning > Reports**.

Step 2 Select the required type of report.

For more information on the types of the reports, see [Reports for the Provisioned Items, on page 78](#).

Step 3 Download the report as either an Excel sheet or PDF.

Note For the Routing Report, you have to select the type of the routing strategy for which you want to generate the report. The options are:

- Current
- Active
- All

Delete inactive objects permanently

Webex Contact Center allows administrators to permanently delete configuration objects that have been marked inactive. This helps customers remove unwanted configurations, keep a lightweight configuration footprint, and improve application performance. Before deleting a configuration object permanently, you will

need to mark it inactive. You can also periodically delete inactive objects using an automatic purge tenant level setting.

You can permanently delete the following configuration object types:

- Users
- User Profiles
- Agent Profiles
- Work Types
- Auxiliary Codes
- Threshold Rules
- Skill Profile
- Teams
- Sites
- Entry Points
- Outdial Entry Points
- Queues
- Outdial Queues
- Desktop Layouts
- Global Variables
- Multimedia Profiles
- Skill Definitions

The maximum number of inactive users is 5000. The maximum inactive objects for all other object types is 100. If this limit is reached, you must delete inactive objects to be able to deactivate more objects. If the configuration object has associated objects, you must inactivate all the referenced objects.

Procedure

- Step 1** From the Management Portal navigation bar, choose **Provisioning**.
- Step 2** Select an entity.
- Step 3** To permanently delete a configuration object manually, on the entity page, click the ellipsis icon beside the object. Select **Delete**.
- Step 4** On the dialog box that informs you that the object will be permanently deleted and can't be recovered, click **Yes**. A message appears that the object is permanently deleted.
- Note** To configure an automatic purge of inactive objects for permanent deletion, see the article [Configure auto-purge of inactive entities](#).
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