



ContactOne

Provisioning Module
User Guide

MOMENTUM
T E L E C O M

Momentum Telecom, Inc. © 2019. All Rights Reserved.

Any product names mentioned in this document may be trademarks or registered trademarks of Momentum Telecom, BroadSoft, or other entities, and their respective trademarks and ownership are hereby acknowledged.

Momentum Telecom reserves the right to update and modify documents as necessary with no prior notice.

CONTENTS

WELCOME	7
INTRODUCTION	7
GETTING STARTED	8
CONTACTONE PREREQUISITES	8
SIGN IN	8
MANAGEMENT PORTAL TOUR	9
PORTAL SECTIONS	9
<i>Toolbar</i>	9
<i>Reports Panel & Work Area</i>	10
<i>Portal Overview</i>	10
CUSTOMIZE YOUR PORTAL	12
<i>Change Your Password</i>	12
<i>Move Charts on the Dashboard</i>	12
<i>Change the Size of a Chart</i>	12
<i>Change the Color Theme</i>	12
<i>Create a Custom Theme</i>	13
GET HELP	13
<i>Display Online Help</i>	13
<i>Help Navigation</i>	13
<i>Print Help Topics</i>	14
PROVISIONING MODULE	15
TENANT SETTINGS	16
<i>Access Tenant Settings</i>	16
General Settings	16
Provisioning	17
Settings	18
Module Permissions	19
Other Permissions	20
Publishing Settings	21
SIP	21
ENTRY POINTS/QUEUES	21
<i>Manage Entry Points or Queues</i>	22
Add an Entry Point	22
View an Entry Point	23
Edit an Entry Point	23
Copy an Entry Point	23
Delete an Entry Point	23
Restore an Entry Point	23
Add a Queue	23
View a Queue	24
Copy a Queue	25
Edit a Queue	25
Delete a Queue	25

SITE	26
<i>Manage Sites</i>	26
Add a Site	26
View Site Settings	26
Edit a Site	27
Block Area Codes for a Site	27
Delete a Site	27
TEAM	28
<i>Manage Teams</i>	28
Add a Team	28
View Team Settings	28
Edit a Team	28
Delete a Team	28
USERS	29
<i>Manage User Accounts</i>	29
Unlock User Accounts	29
Add a User	29
Edit a User	30
Copy a User	31
Delete a User	31
Export User Setting Information to Excel	31
Export User Setting Information to PDF	31
Password Reset a User	31
Revoke API Key for a User	31
USER PROFILES	32
<i>Manage User Profiles</i>	32
Add a User Profile	32
View a User Profile	35
Copy a User Profile	35
Edit a User Profile	36
Delete a User Profile	36
WORK TYPES	37
<i>Manage Work Types</i>	37
Add a Work Type	37
Edit a Work Type	37
Delete a Work Type	37
AUXILIARY CODES	38
<i>Manage Idle Codes</i>	38
Add an Idle Code	38
Edit an Idle Code	38
Delete an Idle Code	38
<i>Manage Wrap up Codes</i>	39
Add a Wrap Up Code	39
Edit a Wrap Up Code	39
Delete a Wrap Up Code	39
AGENT PROFILES	40
<i>Manage Agent Profiles</i>	40
Add an Agent Profile	40
Edit an Agent Profile	42
Copy an Agent Profile	42
Delete an Agent Profile	42

PASSWORD POLICY	43
<i>Manage Password Policies</i>	43
Add a Password Policy	43
Edit a Password Policy	43
Delete a Password Policy	43
BUSINESS METRICS	44
<i>Manage Business Metrics</i>	44
Add a Business Metric	44
View Business Metric Settings	44
Edit a Business Metric	44
Delete a Business Metric	44
ADDRESS BOOK	45
<i>Manage Address Books</i>	45
Add an Address Book	45
Edit an Address Book	45
Delete an Address Book	45
OUTDIAL ANI	46
<i>Manage Outdial ANI</i>	46
Add an Outdial ANI	46
Edit an Outdial ANI	46
Delete an Outdial ANI	46
DIAL PLANS	47
<i>Manage Dial Plans</i>	47
Add a Dial Plan	47
Example System Supplied Any Format Dial Plan	48
Example System Supplied US Dial Plan	48
Edit a Dial Plan	49
Delete a Dial Plan	49
CAD VARIABLES	49
<i>Manage Call-Associated Data (CAD) Variables</i>	50
Add a CAD Variable	50
Edit a CAD Variable	50
Disable a CAD Variable	50
MULTIMEDIA PROFILES	51
<i>Manage Multimedia Profiles</i>	51
Add a Multimedia Profile	51
View a Multimedia Profile	52
Edit a Multimedia Profile	52
Delete a Multimedia Profile	52
MULTIMEDIA ENABLER	52
<i>Manage Multimedia Enablers</i>	52
Add a Multimedia Enabler	52
View Multimedia Enabler Settings	53
Copy a Multimedia Enabler	53
Edit a Multimedia Enabler	53
Delete a Multimedia Enabler	53
MULTIMEDIA EXTENSIONS	54
<i>Manage Multimedia Extensions</i>	54
Add a Multimedia Extension	54
View Multimedia Extension Settings	54

Edit a Multimedia Extension.....	54
Delete a Multimedia Extension	55
SKILLS	55
<i>Manage Skill Definitions</i>	55
Add a New Skill Definition.....	55
Edit a Skill Definition.....	56
<i>Manage Skill Profiles</i>	56
Add a Skill Profile	56
Edit a Skill Profile.....	56
THRESHOLD RULES	57
<i>Manage Threshold Rules</i>	57
Add a Threshold Rule	57
Edit a Threshold Rule.....	59
Copy a Threshold Rule	59
Delete a Threshold Rule	59
DN TO ENTRY POINT MAPPING	60
<i>Manage DN to Entry Point Mapping</i>	60
Filter the DN to Entry Point Mapping List.....	60
Add a DN to Entry Point Mapping	60
Edit a DN to Entry Point Mapping.....	60
Delete a DN to Entry Point Mapping	60
Upload Multiple DN to Entry Point Mappings	61
ENTRY POINT / QUEUE GROUPS	62
<i>Manage Entry Point/Queue Groups</i>	62
Add a Group.....	62
Edit a Group	62
Block Area Codes for a Group	62
Delete a Group.....	63
AGENT BULK UPLOAD.....	63
BULK OPERATION STATUS.....	64
BULK DELETE	65
TEMPLATES.....	65
<i>Upload a .CSV Template File</i>	65
REPORTS	66
<i>Run Provisioning Reports</i>	67
GLOSSARY OF TERMS	68
CUSTOMER SUPPORT	75

WELCOME

Thank you for being part of the Momentum Telecom family!

We are thrilled to have your business and we look forward to working together.

We also want to welcome you to the Momentum ContactOne - a hosted, unified Omni-channel contact center solution. The Momentum Team is constantly developing ways to improve your experience and offer new communications management tools that increase your productivity and make it easy to do what you do. At Momentum, we understand the critical nature of communications services to businesses and to *people*, and we take our responsibility seriously. It is our mission to make certain that you have the ultimate in state-of-the-art communications, unparalleled network reliability, and a consistently superior customer experience to ensure that you and your company are in a position to *thrive*.

Thank you for letting us help you communicate!

Sincerely,

The Entire Momentum Telecom Team

INTRODUCTION

This guide is a convenient, go-to resource for Contact Center Managers, Supervisors and Administrators getting started with the ContactOne Management Portal. It provides an overview of the application website and information about the settings within the Provisioning Module that may be available to various users who access the Portal, with instructions and tips for working with the contact center communication and agent features. This guide is designed to assist authorized users as they perform routine tasks. A complete Help file covering all aspects of the ContactOne Management Portal is provided within the portal, offering information and instructions to assist with more complex tasks. Please note that some add-on features are described here which may not be included in your subscription or offered to all users by your enterprise. Contact your organization's ContactOne Administrator to determine the features and services that you will manage.

We encourage you to take some time to review this document and keep it handy for future reference. Should you need further assistance, please reach out to us. We are always here to help you with fast, courteous, professional support, and we offer additional training upon request. Momentum Telecom is committed to doing everything possible to deliver an exceptional experience to help you and your business *thrive*.

GETTING STARTED

The ContactOne Management Portal offers a comprehensive administrative tool set with all the functionality you need to setup and administer your Contact Centers – locally or world-wide. ContactOne is a hosted, unified Omni-channel contact center solution delivered via the cloud. It offers constant access, cutting-edge features, and predictive analytics to improve operational and business performance. Combined with integrations from leading CRMs and other unified communications products, ContactOne arms agents with intelligent tools to handle customer interactions in-context, and on-demand collaboration with others in the enterprise to increase agent productivity and first call resolutions.

CONTACTONE PREREQUISITES

The ContactOne Management Portal requires the use of one of the following browsers:

Internet Explorer 10 or higher • Recommended: **Mozilla Firefox 38+** or **Google Chrome 44+**

Preliminary Browser Setup:

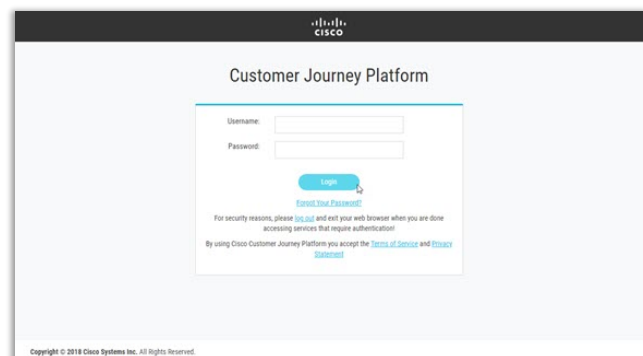
- Cookies set to Enabled
- Security level set to Medium
- Show Pictures option selected
- Pop-up blocker Disabled
- Javascript Enabled
- Browser cache cleared before starting the current (or new) release for the first time

Note: The MM Administrator and MM Agent Desktop modules require *Mozilla Firefox 38* or higher.

SIGN IN

The ContactOne Management Portal is accessed through a Web browser, using login information provided to you by your ContactOne service provider. Access to individual modules, features, and functionality within the portal is defined by the permissions assigned to you by your site administrator.

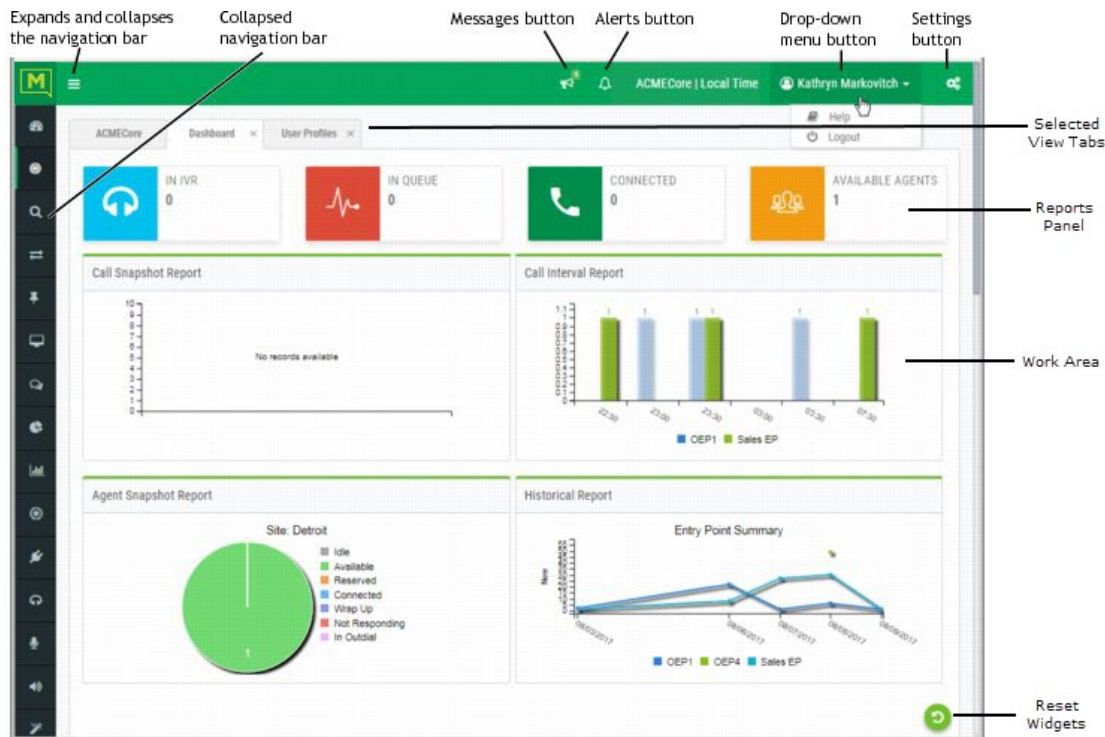
1. Open a Web browser (Chrome, Firefox recommended) and navigate to the URL provided to you by your service host via email.
<http://contactone.momentumtelecom.com>
2. Enter your user name and password.
(Passwords are case sensitive)
3. Click the **Login** button. The ContactOne Management Portal opens to the home page and Dashboard.



Note: When logging out, you should close all open ContactOne windows before logging in again to ensure you are not reviewing old information.


MANAGEMENT PORTAL TOUR

Once you have logged in, the ContactOne Management Portal home page provides access to the tools and features you manage.



PORTAL SECTIONS

TOOLBAR

 **NAVIGATION BAR / MENU** – The first icon in the toolbar expands | collapses the navigation bar on the left side of the screen. The navigation bar menu displays links to the modules that you are authorized to access. Each link displays either as the name of a module when expanded, or an icon that represents the module if the navigation section is collapsed.

 **SYSTEM MESSAGES** – Outages, important information, etc. Click this icon to see system message(s).

 **SUPERVISORY ALERTS** – Requests from Agents for midcall assistance from available supervisors.

 **<YOURNAME>** ▼ – Click this drop-down menu to display the following options:

HELP: Opens a Help file window with access to topics designed to assist you as you work.

LOGOUT: Closes and logs you out of the ContactOne Management Portal.

 **SETTINGS:** Expands and collapses the Settings panel which offers the following features:

- Choose a user interface skin (color theme) and (if enabled) Customize the user interface banner color and images shown on your Management Portal pages. *Access permissions are required.*
- Change your password.
- Change the time zone to display appropriate routing strategies.

REPORTS PANEL & WORK AREA

In the Dashboard view, the center of the screen displays a Reports Panel with widgets at the top that offer counts of the number of calls currently in *IVR*, *In Queue*, and *Connected*, along with the number of currently available agents, and Real-Time Data and/or Historical Data charts below, as defined in the Real-Time Reports and Historical Reports modules.

Click on a chart to display the corresponding Real-Time or Historical report in a new tab.





When a module is selected and opened, its page displays as a 'tab' above the Reports panel and the center of the screen becomes your Work Area where tasks will be performed and data may be reviewed.














PORTAL OVERVIEW

The Management Portal offers access to the dashboard and any modules you have been assigned to use. Click the icon in the Navigation bar menu on the left that represents the appropriate module. If the navigation bar is collapsed, you can click the menu  button on the upper-left side of the screen to expand the menu and review all of the icons and module names to which you have access.





Modules are optional. Those the organization elected to utilize will require authorization permissions and the correct login credentials to gain access.

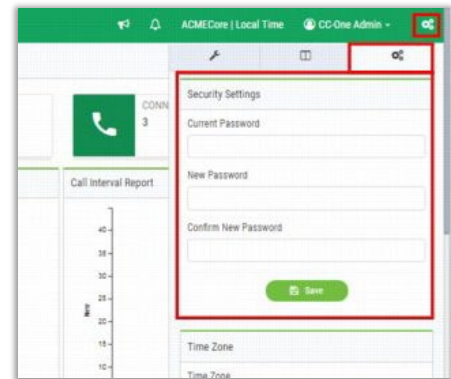
Available Modules	Features & Tools
 Provisioning	View settings provisioned for your enterprise. Create and edit users, queues, entry points, DN to entry point mappings, sites, skills and skill profiles, multimedia profiles, threshold rules, teams, idle and wrap-up codes and work types, address books, password policies, user and agent profiles, business metrics, and call-associated data variables for use in call control scripts. Add agents to the system and assign them to teams, and delete, activate, and unlock agent accounts. Access Provisioned Items reports.
 Analyzer	Optional. The Customer Engagement Analyzer module allows authorized users to segment, profile, and visualize the data in your contact center system to identify key variables that impact productivity and desired business outcomes.
 Analyzer Data Exchange	Optional. Allows Customer Engagement Analyzer users to create and modify the Analyzer schema.
 Business Rules	Optional. Enables authorized Customer Engagement Analyzer module users to incorporate customer data into the ContactOne environment for custom routing as well as for general implementation.

 Agent Desktop	Handle customer contacts as an Agent.
Campaign Manager	Optional. This module allows authorized users to manage outbound voice and email campaigns.
 Real-Time Reports	View real-time statistics and key performance indicators across all call center sites, teams, and agents.
 Historical Reports	View saved historical reports, create new reports, and adjust report parameters.
 Web Callback Request Report	View information about Web callback requests.
 Routing Strategy	Optional. Create scheduled routing strategies and team capacity strategies and make real-time adjustments to call center traffic flow.
 Call Monitoring	Silently monitor calls at any site for any team or agent, provide instructions to the monitored agent without being heard by the caller, and join a call being monitored and participate in the conversation.
 Call Recording	Optional. Record calls at any site for any team or agent.
 Recording Management	Optional. Search for and play calls recorded through the ContactOne Call Recording feature.
 Workforce Optimization	Optional. Access Workforce Management, Quality Management, and WFO Analytics, including Speech, Text, and Desktop Analytics.
Account Unlock	Unlock user accounts at specified sites and on specified teams.
 Password Reset	Reset or reassign passwords for one or more agents at specified sites and on specified teams.
 Audit Trail	Optional. View details about the changes made to the provisioning database tables for your enterprise anytime during the past two weeks and export the data to a data analysis tool such as Microsoft Excel.
 Usage Metrics Report	Optional. Authorized users can view usage metrics for up to 13 months.
 Release Notes	Optional. View and download release notes.
MM Provisioning	Optional. Multimedia Provisioning. Define resources used for email and chat.
MM Agent Desktop	Optional. Multimedia Agent Desktop. Monitor assigned email and chat queues and the agents assigned to those queues, reallocate and reject email contacts, approve email responses, silently monitor chat conversations, coach the agent being monitored, and join a chat in progress.

CUSTOMIZE YOUR PORTAL

CHANGE YOUR PASSWORD

1. Click the Settings  icon in the upper-right corner of the toolbar to display the Settings panels.
2. Click the tab displaying the gears  icon to view Security Settings.
3. Type your current password in the Current Password field.
4. Type your new password in the New Password and Confirm New Password fields.
5. Click **Save**.
Passwords are always case sensitive.




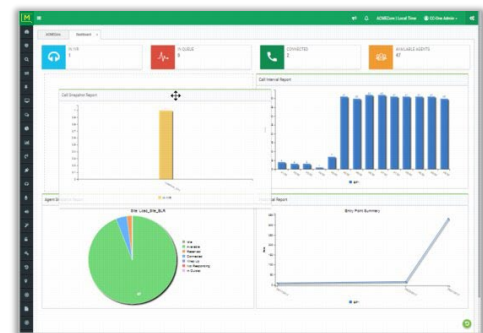
MOVE CHARTS ON THE DASHBOARD

Drag and drop the title bar section of a chart on your dashboard to move it to a different position and customize your view.

CHANGE THE SIZE OF A CHART




1. Point to a corner or edge of a chart so the cursor changes to a two-headed arrow.
2. Drag the corner or edge to shrink or enlarge the chart.

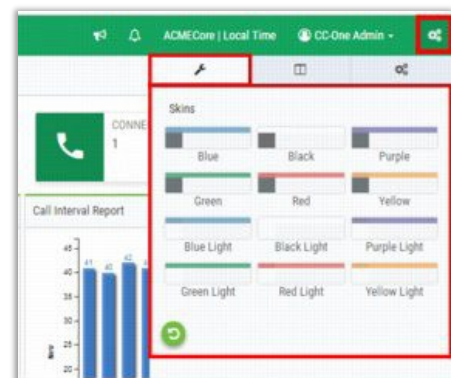
To restore the Charts to Original Size, Click the  **RESET/REFRESH** button, at the bottom of the page.



CHANGE THE COLOR THEME




Multiple color skin options are provided to allow you to change the set of colors in the selection panel and in the toolbar banner:

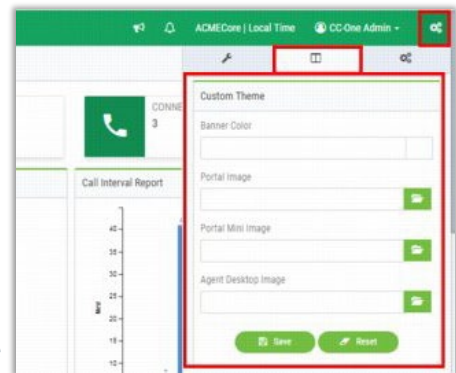
1. Click the gears  icon in the toolbar (upper-right corner) to display the Settings panel.
2. Click the tab displaying the wrench  icon to view the **SKINS** options.
3. Click an option to select a new skin. The colors display immediately so you can decide whether you like it.
To return the display to the default colors, click the Reset  button at the bottom of the **SKINS** panel.



CREATE A CUSTOM THEME

Authorized users can customize the banner color and images displayed on their Management Portal pages by creating a custom theme.

1. Click the **SETTINGS**  icon on the upper-right side of the home page.
2. Click the tab displaying the  icon to display the **CUSTOM THEME** settings.
3. Under **Banner Color**, either type the HTML (hexadecimal) code for a color or click inside the small box on the right and select a color from the color selector.
4. Click the folder  button next to an image type to navigate to the image file in your system that you want to use and click **Open**.
Supported file formats are PNG, JPG, JPEG, and GIF.
5. Click **Save** to submit your custom theme settings.



GET HELP

After you sign in to the ContactOne portal, you can access full documentation via the online **HELP** at any time from any section in the portal as you work. The **HELP** file will open to the section you are in to offer instructions and tips for using the tools and settings you see.

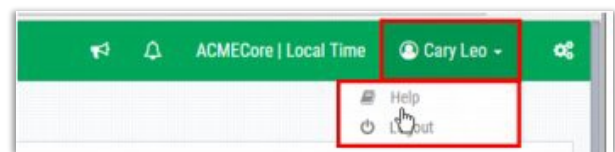
DISPLAY ONLINE HELP

After you sign in to the ContactOne service, you can access online Help at any time from any section in the portal.

- ▶ Click the **HELP** link on the upper right side of any module page.

-OR-

- ▶ Click on your Login Name on the on the upper-right side of the screen and select **HELP**. (If your browser window is wide enough the button also displays your login name.)



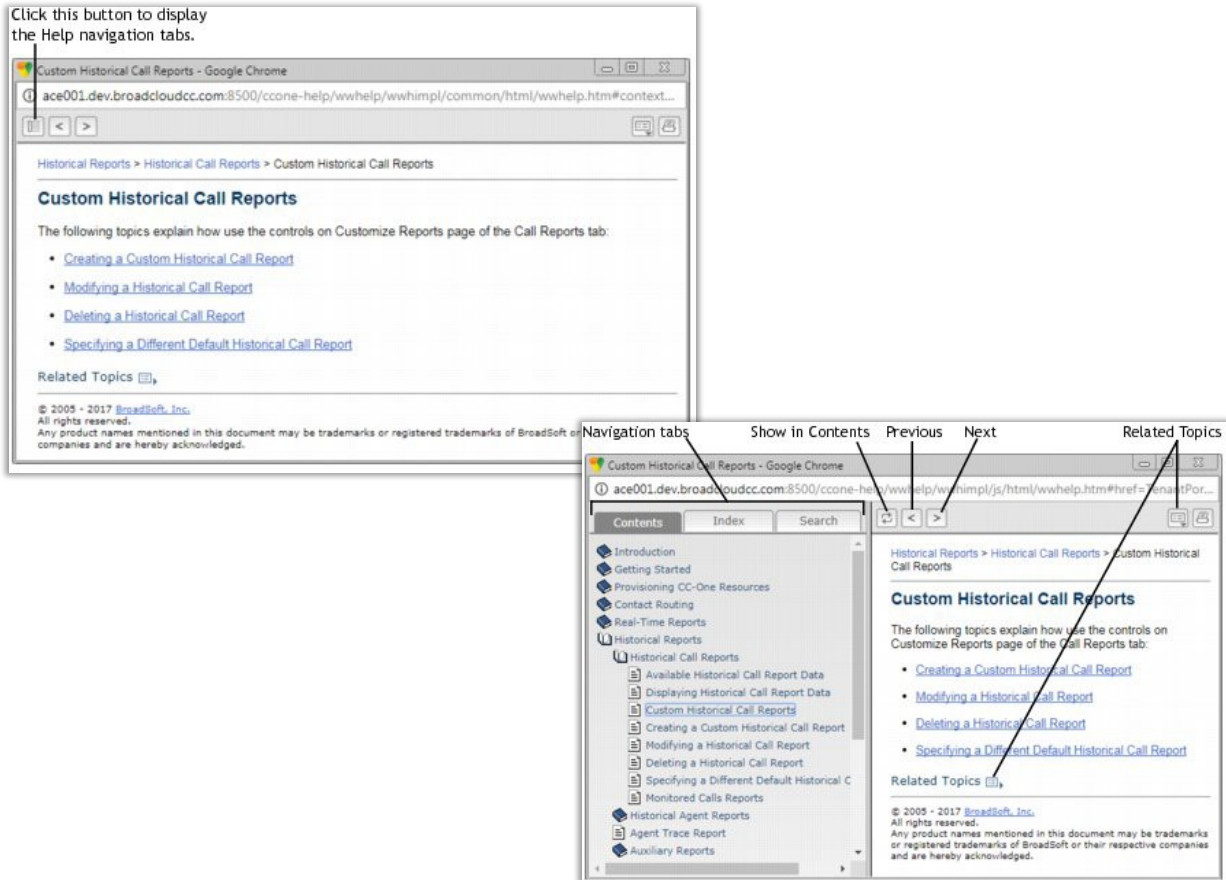
The topics related to the current ContactOne view are displayed to you in a new dialog.

HELP NAVIGATION

The Help file is context sensitive, so when you access **Help** from a page or section in the ContactOne module, information about the page and section you are viewing displays.

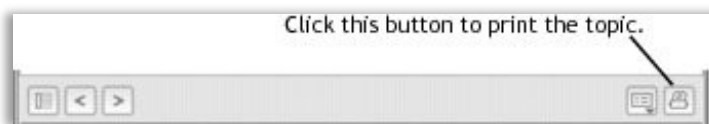
Simply click the **SHOW NAVIGATION**  button to display the full menu of Help topics for all of the ContactOne Management Portal.

- ▼ Help window with the navigation tabs displayed.



PRINT HELP TOPICS


1. Display the Help topic you want to print.
2. Select the **PRINT** button on the Help window toolbar at the top of the dialog.
3. Select the appropriate print options in the Print dialog, or save to PDF format.



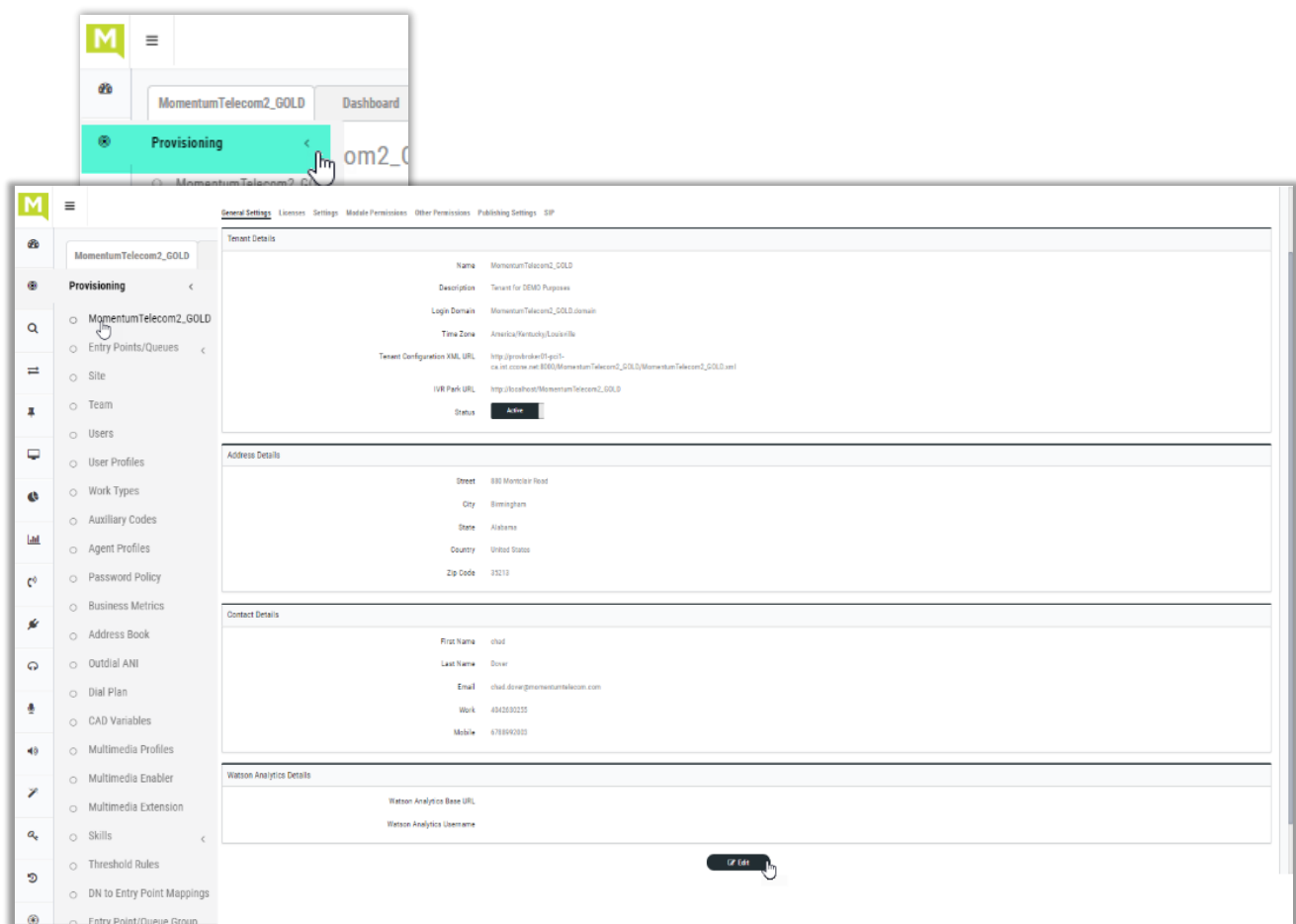
This rest of this guide describes the typical functions performed in the Provisioning Module of the Management Portal.

PROVISIONING MODULE

ContactOne provides advanced features and tools that are pre-defined during the implementation phase by the provider to offer a complete system that meets the Tenant's specifications. Most maintenance is completed by the provider, however, a Provisioning Module is provided, and some users may be granted authorization to perform some of these more advanced maintenance tasks to update access permissions for users, teams, sites, the other modules, etc. Please check with your organization's ContactOne system administrator to determine whether your account has access to perform any administration-level tasks.

 The provisioning setup for ALL levels, features, agents, and supporting modules is completed by the provider during the implementation phase. Many foundational settings are not available for editing by users and require provider assistance for any modifications to ensure a seamless update to the setup. Telecom managers, contact center managers, and other representatives of the enterprise who are authorized to access the ContactOne service may also be provided with access to the Provisioning Module in the Management Portal to maintain some settings for tenants, sites, teams, agent profiles, codes, entry points, queues, and more.

For most organizations, the Provisioning Module simply provides a way to view the current setup and an interface for adding new agents, assigning them to teams, and managing their agent's access to the ContactOne modules.



The screenshot displays the Provisioning Module interface for a tenant named 'MomentumTelecom2_GOLD'. The interface is divided into several sections:

- Tenant Details:**
 - Name: MomentumTelecom2_GOLD
 - Description: Tenant for DEMO Purposes
 - Login Domain: MomentumTelecom2_GOLD.domain
 - Time Zone: America/NewYork/LosAngeles
 - Tenant Configuration XML URL: http://prodskel01gw01-cx-01-cosw.net:8080/MomentumTelecom2_GOLD/MomentumTelecom2_GOLD.xml
 - IUR Park URL: http://localhost/MomentumTelecom2_GOLD
 - Status: Active
- Address Details:**
 - Street: 880 Montclair Road
 - City: Birmingham
 - State: Alabama
 - Country: United States
 - Zip Code: 35213
- Contact Details:**
 - First Name: chad
 - Last Name: Dowe
 - Email: chad.dowe@momentumtelecom.com
 - Work: 4043300235
 - Mobile: 6788940003
- Watson Analytics Details:**
 - Watson Analytics Base URL:
 - Watson Analytics Username:

An 'Edit' button is visible at the bottom right of the interface.

TENANT SETTINGS

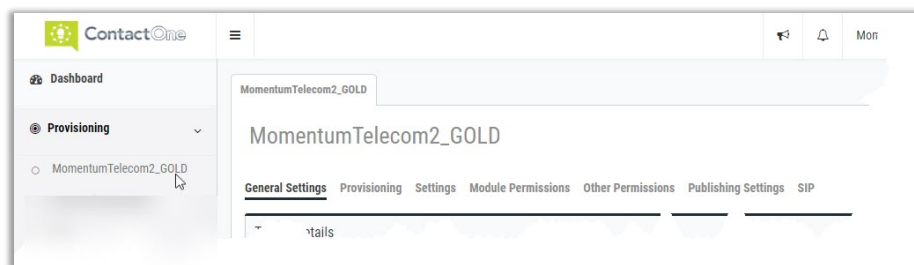
The Tenant Settings section of the Provisioning Module offers access to review the *enterprise level* setup for one or more contact center sites and to make minor changes to the settings where authorized.

MANAGE TENANT SETTINGS

Access Tenant Settings

1. Go to **PROVISIONING** and select **TENANT** within the menu view.
Or, Click on the *Enterprise Name* on the Home Page.
2. Select the appropriate tab (at the top of the work area) to open the setting section you wish to review.
3. Scroll to the bottom of the page in the selected area to view the action options.
4. Click the **EDIT** button to gain access to any settings in the selected view that you may be authorized to modify.
5. Make changes as needed.
6. Click **SAVE** to submit the changes and close the edit dialog.

The Tenant settings are organized within Tabs at the top of the page.



Click the [Help](#) link to view setting information while you work.

To *Edit* the Tenant settings, click the **EDIT** button at the bottom of the page and **SAVE** when finished.

General Settings Tab

The *General Settings* tab displays the settings described in the following table. The Tenant column identifies settings that can be specified by authorized users at your enterprise. To edit settings, click the Edit button at the bottom of the page.

Tenant Details

Name: The name of the enterprise.

Description: An optional description.

Login Domain: The value used to uniquely identify a topic for your enterprise in the internal data exchange (IDX) and customer data exchange (CDX) servers.

Time Zone: The time zone provisioned for your enterprise.

Tenant Configuration XML URL: The location of the configuration file containing additional settings for your enterprise.

IVR Park URL: The navigation path for the audio file that will be played while a call is in queue. The audio file name is specified in the Routing Strategy module and concatenated to the path specified in this field. **Note:** If a tenant's *IVR Park URL* file path is changed, each Routing Strategy the Tenant has created must be Edited and Saved.

Status: This setting is not editable.

Address Details

Street: The street address, city, state, country, and zip code of the primary contact.

Tenant Contact Details

First name: The first name of the tenant administrator.

Last Name: Last name of the tenant administrator.

Email: The email address of the tenant administrator.

Work: Work phone number of the tenant administrator.

Mobile: Mobile phone number of the tenant administrator.

Watson Analytics Details

Watson Base Url: **Note:** *The Watson Base Url field is displayed only on the Edit page.* Optional feature that allows for sentiment analysis for the conversation between the customer and the agent in chat interactions. When the tenant signs up for an IBM Watson account, they obtain the values needed for the Watson Analytics Username and Watson Analytics Password fields.

Provisioning Tab

The Provisioning tab displays the System Profile settings specified by the service provider administrator as follows:

Maximum Provisioned Users: The maximum number of users that can be defined for your enterprise.

Agent Options:

- **Standard Agents - Inbound Voice:** If set to **Yes**, your enterprise includes agents who use only the voice channel to interact with customers.
- **Premium Agents - Inbound Multichannel:** If set to **Yes**, your enterprise includes agents who use a channel such as email or chat in addition to the voice channel to interact with customers.

Workforce Options: If set to **Yes**, one or more of the Workforce Optimization options are enabled for your enterprise: Quality Management, Workforce Management, WFO Analytics, Workforce Analytics with Transcriptions, or the Workforce Optimization Bundle.

Campaign Management: If set to **Yes**, the Campaign Manager module is enabled for your enterprise.

Recording Storage: **Note:** *This field is hidden if the **Pruning Strategy** setting is not time based.* Specify the number of months call recordings will be retained. Recordings made prior to the

specified number of months are removed. A month is defined as 31 days, and one additional day is added to the total number of days before the recordings are deleted. Thus, 1 month means 32 days; 2 months means 31 days x 2 + 1 day = 63 days. For some tenants, this field might show the value in days.

Speech Enabled IVR: If set to **Yes**, Speech Enabled IVR is enabled for your enterprise.

Web Callback Option: If set to **Yes**, Web Callback is enabled for your enterprise.

Settings Tab

Call Settings

Short Call Threshold: Set the time interval, in seconds, that determines whether a call is considered Short or Abandoned.

Sudden Disconnect Threshold: The time interval, in seconds, that determines whether a call is considered handled or was terminated so quickly as to possibly indicate an issue with connectivity or agent behavior. A call that is terminated after being distributed to a destination site, but within this time interval, is considered to be a disconnected call.

Maximum Active Calls: Set the maximum number of active calls allowed. Neither the Outdial Maximum Active Calls nor the Inbound Maximum Active Calls can exceed this value. When Portal users add or edit an Entry Point or Queue, the value they enter for *Inbound Maximum Active Calls* and or *Outdial Maximum Active Calls* will be validated against this setting value.

Inbound Maximum Active Calls: Set the maximum number of inbound calls that can be active. This includes all site, team, DN, queued, and in-process calls. A call that arrives after the maximum number defined here is busied out.

Outdial Maximum Active Calls: Set the maximum number of active outdial calls across the tenant.

Other Settings

Allow Agent Threshold: This field specifies whether or not the Agent Threshold Alerts feature is enabled for your enterprise. The Threshold Alerts feature is enabled for all tenants with a Standard or Premium license.

Maximum Callback Attempts: Set the number of times the system will attempt a requested callback if the initial callback attempt fails.

Retry Callback Interval: Set the number of seconds between callback attempts in the event the initial callback attempt fails.

Pause/Resume Enabled: If set to **Yes**, agents can click the Privacy Shield button during a call to pause and resume potential call recording. For example, the agent might need to pause potential call recording while obtaining a credit card number or other protected information. If set to **No**, this feature can be enabled for individual queues (see Adding an Entry Point or Queue). **Note:** *The Privacy Shield button is displayed on the Agent Desktop only if the Privacy Shield feature is enabled in your service configuration.*

Recording Pause Duration: If set to **Yes**, this setting specifies how many seconds call recording will be allowed to be paused if the agent does not click the *Turn Off Privacy Shield* button.

Allow Password Reset: If set to **Yes**, the Password Reset module is enabled for your enterprise (see [Resetting Agent Passwords](#)).

Check Agent Availability: If set to **Yes**, teams with no logged in agents can be excluded for consideration as the routing strategy escalates over time. If set to **No**, the Check Agent Availability setting can be enabled for individual inbound queues (see [Adding an Entry Point or Queue](#)).

Record All Calls: If set to **Yes**, all inbound and outdial calls will be recorded. If set to **No**, calls will be recorded based on settings for each queue.

Module Permissions Tab

The Module Permissions page displays the following settings to define some module behaviors:

SCR Enabled: If set to **Yes**, the Scorecard Routing feature is enabled for your enterprise.

Threshold Alerts Enabled: If set to **Yes**, the Threshold Alerts feature is enabled for your enterprise.

Maximum Threshold Rules: Set the maximum number of active threshold rules that can be defined for your enterprise.

SBR Enabled: If set to **Yes**, the Skills-Based Routing (SBR) feature is enabled for your enterprise.

Maximum Skills: Set the maximum number of skills that can be defined for your enterprise.

Maximum Text Skills: Set the maximum number of text skills that can be defined for your enterprise.

Multimedia Enabled: If set to **Yes**, the Multimedia feature is enabled for your enterprise.

Multimedia Extensions Enabled: If set to **Yes**, Multimedia Extensions are enabled for your enterprise.

Maximum Channels Per Profile: Set the maximum number of channels that can be specified for a multimedia profile. (Visible only if Multimedia is enabled).

Voice Callback Enabled: If set to **Yes**, the Callback call control block is available for use in call control scripts (see [Callback Block](#)). **Note:** A **Yes** setting here automatically sets **Web Callback Enabled** to **Yes**.

Web Callback Enabled: If set to **Yes**, the Web Callback feature is enabled for your enterprise (see [About Web Callback](#)). **Note:** If **Voice Callback Enabled** is set to **Yes**, then **Web Callback Enabled** is automatically set to **Yes** and cannot be changed to **No**.

Recording Management Enabled: If set to **Yes**, the Recording Management module is enabled for your enterprise.

Recording Pruning Strategy: If the Recording Management module is enabled for your enterprise, specifies the recording pruning strategy for the enterprise: **No Pruning**, **Time Based**, **Agent Minutes**, or **Storage Based**. When a change is made to this setting, an email is sent to all users who are authorized to change the setting.

Pruning Value: Set to enabled and specify the value for the selected recording pruning strategy as either **0** for **No Pruning** or one of the following values:

- **Time Based strategy:** set the number of days to retain recordings. Recordings made prior to the specified number of days are removed.

- **Agent Minutes strategy:** set 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.
- **Storage Based strategy:** set the limit on the total recording size in megabytes. When the limit is reached the oldest recordings beyond the specified storage value are removed.

Analytics Enabled: If set to **Yes**, the Customer Engagement Analyzer, Analyzer Data Exchange, and Business Rules modules are enabled for your enterprise.

Other Permissions Tab

The Other Permissions tab displays the following settings:

SAM CDX Data Compression: Select **Yes** for a tenant with more than **300** agents.

SAM IDX Data Compression: Select **Yes** for a tenant with more than **300** agents.

SAM Data Compression Type: If a SAM data compression field is set to **Yes**, select **gzip** from the drop-down list. Otherwise, leave this field set to **none**. Do not select zip. This setting is not applicable.

Number of CAD Variables: The maximum number of active call-associated data (CAD) variables that can be defined for your enterprise (see Call-Associated Data Variables).

Maximum Address Books: The maximum number of address books that can be defined for your enterprise (see Address Books).

Maximum Provisioned Agents: Specify the maximum number of agents that can be defined for your enterprise. This value must be less than the value specified for *Maximum Provisioned Users*.

Maximum Entry Points and Queues: Define the maximum number of entry points and queues that can be defined for your enterprise.

External ID: (Applies only to CJP Salesforce Edition.)

Permit Alert: If set to **Yes**, the Supervisory Alert feature is enabled for your enterprise.

Last Agent Routing: If set to **Yes**, Last agent Routing is enabled for your enterprise.

Enabled Leg Recordings: If set to **Yes**, three files are created for each recorded call: one with audio of both the caller and the agent, one with just the caller audio, and one with just the agent audio. (This is a custom setting.)

Site Level DN Enabled: If set to **Yes**, the DN to Entry Point Mappings interface provides controls for creating mappings at the site level as well as the tenant level (see DN to Entry Point Mapping).

Multiple Time Zone Enabled: If set to **Yes**, entry points and queues can be associated with time zones. Time values in routing strategies will be based on the time zone provisioned for the entry point or queue or, if no time zone is specified, the time zone provisioned for your enterprise.

Lock Users Allowed: If set to **Yes**, the Account Unlock module is enabled for your enterprise.

Allow Agent Access to Recordings: If set to **Yes**, agents whose profiles permit access to recordings can review recordings of calls they handled within the past 24 hours.

Publishing Settings Tab

The Publishing Settings tab displays the statistics aggregation manager (SAM) topics that are used for custom reporting. If your enterprise uses Custom Reporting based on any of the options provided, the related setting should be set to Yes.

Publish Call Events Yes/No

Publish Agent Events Yes/No

Publish Agent Command Events Yes/No

Publish Queued Values Yes/No

Publish Dynamic Queued Values Yes/No

Publish Agent Detailed Values Yes/No

These settings are specified by the Provider during implementation.

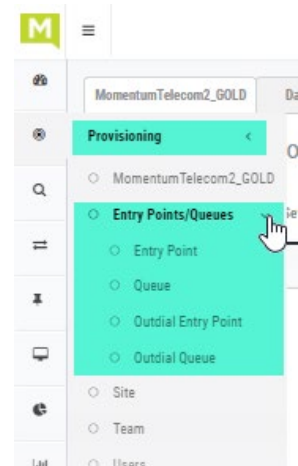
SIP

When SIP is in use, the SIP tab displays the DN range assigned to one or more SIP trunks associated with your enterprise. If no SIPs are setup, the page displays a message noting that SIP is not in use. The DN assignments for SIP are specified by the service provider administrator and may be maintained by an authorized ContactOne administrator, if permissions to do so are defined.

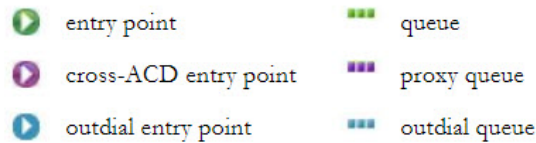
ENTRY POINTS/QUEUES

Entry points and queues are types of virtual teams. A virtual team can be thought of as a “holding place” for incoming customer calls.

- An **ENTRY POINT** is the initial landing place for customer calls on the system. One or more toll-free or dial numbers can be associated with a given entry point. IVR call treatment is performed while a call is in the entry point. The entry points that are used in the Scorecard Routing environment are referred to as cross-ACD entry points. Calls that arrive at a cross-ACD entry point can be routed to queues on external ACDs.
- A **QUEUE** is where calls are kept while they await handling by an agent. Calls are moved from the entry point into a queue and are subsequently distributed to agents.
- An *inbound queue* that represents a third-party ACD is known as a **proxy queue**. Calls that are sent to an external ACD are distributed to agents by the external ACD. Proxy queues are used by the system to track the call activity occurring on the external ACD queues. There are two types of proxy queues: dedicated and shared. Agents signed in to a dedicated proxy queue serve only the customer; agents signed in to a shared queue serve multiple customers.
- Two additional virtual team types are provisioned for tenants of the standard service that use the outdial feature: outdial entry point and outdial queue.




Each entry point and queue type in use is represented by a unique icon for display within ContactOne:



Click the [Help](#) link to view setting information while you work.

MANAGE ENTRY POINTS OR QUEUES

1. Go to  PROVISIONING > ENTRY POINTS/QUEUES.
2. Click on one of the *Entry Point* or *Queue* options you wish to review. Authorized users may have access to complete the following tasks for Entry Points or Queues:

Add an Entry Point

1. Click on the [NEW ENTRY POINT](#) button to begin.
2. Define or select from the following settings as required or needed for the Entry Point:

General Settings

Name: Required. Enter a short descriptive name to display in lists.

Description: Optional. A short description of the purpose.

Channel Type: Select a channel option in the drop-down list. (e.g.; Text or Telephony)

Advanced Settings

Service Level Threshold: In Seconds, set the maximum length of time for a call to be in queue before being flagged as outside service level.

Maximum Active Calls: Specify the maximum number of active calls allowed for the Entry Point. Calls exceeding this number will receive a busy signal.

Control Script URL: This field is autopopulated.

IVR Requeue URL: This field is autopopulated.

Overflow Number: Enter a destination number (11 digits, no symbols or spaces) for calls that exceed the Maximum Time in Queue value in a Routing Strategy.

Vendor ID: For Proxy queue or Non-Telephony media type. Enter the unique alphanumeric string that maps the queue to the vendor.

Time Zone (routing strategies only): Set a time zone for the entry point. This setting will be used if no overriding time zone is provisioned for the routing strategy or enterprise.


DN List

IVR DN List: If this entry point will be integrated with an external IVR, enter the DN pool list numbers.

3. Click on the [SAVE](#) button to submit the new Entry Point when finished.


View an Entry Point

While in the Entry Points page:


1. Click on the ellipsis **...** icon next to an item in the list.
2. Select the **VIEW**  option to review the current settings.
3. Click **CANCEL** to close the view when finished.

Edit an Entry Point

While in the Entry Points page:


1. Click on the ellipsis **...** icon next to an item in the list.
2. Select the **EDIT**  option.
3. Make changes to the available settings, as needed.
4. Click the **SAVE** button when finished.

Copy an Entry Point

1. Click on the ellipsis **...** icon next to an item in the list.
2. Select the **COPY**  option to use this Entry Point's setup as the basis for a new Entry Point.
3. Make changes to the available settings, as needed or required.
4. Click on the **SAVE** button when finished.

Delete an Entry Point

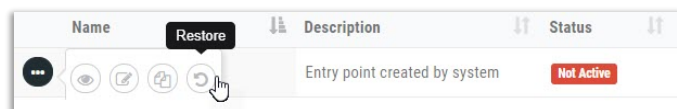
While in the Entry Points page:

1. Click on the ellipsis **...** icon next to an item in the list.
2. Select the **DELETE**  option.
3. Confirm the action when prompted to remove the Entry Point from active use.

Restore an Entry Point

While in the Entry Points page:

1. Click on the ellipsis **...** icon next to an item in the list that has a status of **Not Active**.
2. Select the **RESTORE** option.
3. Confirm the action when prompted.



Add a Queue

While in the appropriate Queue page:

1. Click on the **NEW QUEUE** button to begin.
2. Define or select from the following settings as required or needed for the Queue:

General Settings (settings are outdial/inbound dependent)

Name: Required. Enter a short descriptive name to display in lists.

Description: Optional. A short description of the purpose.

Check Agent Availability: Inbound Routing Strategies: Select **Yes** or **No** to define whether the routing strategy will use Agent Availability status. (The Tenant settings overrides this if they conflict)

Outdial Primary DID URL: Defined by provider.

Outdial Backup DID URL: Defined by provider.

Channel Type: Select an option in the drop-down list. (e.g.; Text or Telephony)

Advanced Settings

Permits: Set these options to **YES** or **NO** (default) to determine whether the *Monitoring*, *Parking*, and *Recording* will be in use.

Record All Calls: Used with Permit Recording – Set to Yes or No to indicate whether ALL calls will be recorded.

Pause/Resume Enabled: Enables the Privacy Shield button in Agent Desktop that allows agents to pause and resume during calls that may be recorded. Set to **Yes** to enable, set to **No** to disable.

Recording Pause Duration: If Pause/Resume is enabled, define the maximum length of time the Privacy Shield function may be left on *Pause* in seconds.

Service Level Threshold: Set the length of time in seconds that a call may wait in queue before it is flagged as out of service level.

Maximum Active Calls: Set the maximum number of active calls allowed for this Queue.

Control Script URL: Defined by provider or Service Administrator.

IVR Requeue URL: Defined by provider or Service Administrator.

Maximum Time in Queue: Specify how many seconds a call may wait in queue before it is sent to the overflow number.

Overflow Number: Enter a destination phone number (11 digits, no spaces/symbols) for calls that exceed the Maximum Time in Queue threshold.


Vendor ID: (proxy queue or non-telephony) Enter the unique alphanumeric string that maps to the vendor.

Time Zone: (Routing Strategies Only) Select an option from the drop-down list.

3. Click on the **SAVE** button to submit the new Queue.

View a Queue


While in the appropriate Queue page:

1. Click on the ellipsis **...** icon next to an item in the list.
2. Select the **VIEW**  option to review the current settings.

3. Click **CANCEL** to close the view when finished.


Copy a Queue

While in the appropriate Queue page:

1. Click on the ellipsis **...** icon next to an item in the list.
2. Select the **COPY**  option to use this Queue's setup as the basis for a new Queue.
3. Make changes to the available settings, as needed or required.
4. Click on the **SAVE** button when finished.


Edit a Queue

While in the appropriate Queue list:

1. Click on the ellipsis **...** icon next to an item in the list.
2. Select the **EDIT**  option.
3. Make changes to the available settings, as needed.
4. Click the **SAVE** button when finished.

Delete a Queue

While in the appropriate Queue list:

1. Click on the ellipsis **...** icon next to an item in the list.
2. Select the **DELETE**  option.
3. Confirm the action when prompted to remove the Queue from active use.

SITE

A site is a physical contact center location under the control of your enterprise. For example, an enterprise named **Acme** might have sites in Chicago, Manila, and Bangalore with agents assigned to it to handle calls.

Click the [Help](#) link to view setting information while you work.

MANAGE SITES

Note the following about adding or removing sites:

- Each Site requires a Team. When a Site is added, the system automatically adds a team for the new site. The name and other Team settings can be changed; the team's **Type** cannot be modified. (E.g.: from Capacity Based to Agent Based). Do not delete the team without first adding a different team (new name, etc.) for a New Site.
 - A Site cannot be deleted if any agents, profiles, teams, etc. are associated with it. A deleted Site continues to be displayed in the Sites List (Not Active) and in historical reports.
1. Go to [PROVISIONING > SITES](#) to open the *Sites Listing* page. Authorized users may have access to perform the following actions to manage Site settings:


Add a Site

While in the Sites page:

1. Click on the [NEW SITE](#) button.
2. Enter the *Name* and select the *Type*
3. Click the [SAVE](#) button.



View Site Settings

While in the Sites page:




1. Click on the **...** ellipsis icon adjacent to the listing
2. Select the [VIEW](#)  option and review the information.

Edit a Site

While in the Sites page:



1. Click on the  ellipsis icon adjacent to the listing
2. Select the **EDIT**  option
3. Make changes to settings, as needed.
4. Click **SAVE** to submit the changes.

Block Area Codes for a Site

1. Click on the  ellipsis icon adjacent to the listing
2. Select the **EDIT**  option.
3. Click on the **Edit** icon for *Choose Area Codes* dialog
4. Select a State and then select one or more Area Codes.
5. Repeat for additional States and Area Codes
6. Click on the **Save** button to submit the blocked area codes and close that dialog
7. Click the **Save** button for the Site settings to submit all changes and close the *Edit* view.
 - **Remove Area Code Blocks:** To remove an area code while viewing *Choose Area Codes*, select the relevant state from the *State* drop-down list and then either click the X the left of the area code listed in the *Area Codes* field or, to delete all selected area codes for a *State*, click the **Delete**  button to the right of the listed area codes in the *Selected Area Code Details* table, then click **Save** to submit the changes to *Area Codes* for the Site. Continue editing or click **Save** to submit all changes for the Site.

Delete a Site

While in the Sites page:

1. Click on the  ellipsis icon adjacent to the listing.
2. Select the **DELETE**  option.
3. Confirm the action when prompted.

If the selection is currently being referenced by other entities, it cannot be deleted until those associations are removed. If a Site is still associated when Delete is attempted, a message containing information about any current associations is displayed to assist the user.

TEAM

The Team module provides an interface to define and manage teams in the system. A Team is a group of agents associated with a specific site or strategy who support a specific group of functions; for example, Gold Customer Service or Billing. The Team settings should not be modified after creation, and cannot be deleted while any entities (agents, skills, profiles, etc.) are associated with it.

Click the [Help](#) link to view setting information while you work.

MANAGE TEAMS

1. Go to [PROVISIONING > TEAMS](#) to open the *Teams* page.
2. Select an action to perform. Authorized users may have access to perform the following actions to manage Site settings:


Add a Team

While in the Teams page:

1. Click on the [NEW TEAM](#) button.
2. Enter the *Name*, *Type*, *Status* and any advanced settings that are required by your setting selections.
Note: Most settings cannot be modified after a Team is created.
3. Click the [SAVE](#) button to submit the new team when finished.


View Team Settings

While in the Teams page:

1. Click on the **⋮** ellipsis icon adjacent to the listing.
2. Select the [VIEW](#)  option and review the information.

Edit a Team

While in the Teams page:

1. Click on the **⋮** ellipsis icon adjacent to the listing.
2. Select the [EDIT](#)  option
3. Make changes to the settings as needed.
4. Click [SAVE](#) to submit the changes.

Delete a Team

While in the Teams page:

1. Click on the **⋮** ellipsis icon adjacent to the listing.
2. Select the [DELETE](#)  option.

3. Confirm the action when prompted.

Note: A team cannot be deleted if it is in use and a deleted team continues to be visible in historical reports and within the Teams list (Not Active).

USERS

The **USERS** page provides an interface where you can add new Management Portal and Agent users, view and edit existing user accounts, search for specific users, and export the user information to a data analysis tool. You can also delete user accounts, which makes them inactive. An inactive user cannot access features and modules until the account is restored.

The Agent Settings section of the **USERS > ADD** page (displayed when *Call Center Enabled* is set to **Yes**) provides an interface for adding agents to the system and assigning them to the agent-based teams that they will support. After a user has been added as an Agent, you can make real-time changes to that agent's settings — for example, reassigning teams; locking, unlocking, deleting and activating agent accounts; and changing password information.

Click the [Help](#) link to view setting information while you work.

MANAGE USER ACCOUNTS


1. Go to **PROVISIONING > USERS** to open the Users page.

Authorized users may have access to perform the following actions:

Unlock User Accounts

The system automatically locks a user account and prevents future attempts to log in if the user enters an incorrect password more than the specified number of times in succession. The maximum number of allowable invalid login attempts is determined by the Password Policy assigned to the User Profile.

Note: A locked user account can be unlocked only by a user whose profile includes the Account Unlock permission.

1. Click the on the **⋮** ellipsis icon next to the user listing.
2. Select the **EDIT**  option.
3. Scroll down to the **Security Settings** section and change the Account Locked setting to **NO**.
4. Click the **SAVE** button to update the settings and unlock the account.

Add a User

While in the Users page:

1. Click the New User button.
2. Define or select the following settings as required or needed:

General Settings

Username: Enter a valid email address the user will use to log in to the system. This setting cannot be edited.

First Name: Enter the user's first name.

Last Name: Enter the user's last name.

Contact Information - Optional: Enter the User's contact information for Email, Address/Location, Work and Mobile numbers.

User Profile: Required. Select the profile you want to assign to the user from the drop-down list.

Contact Center Enabled: When set to **Yes** this user will have login credentials for the Agent Desktop. A **Yes** for this setting auto-displays the Agent Settings below.

Security Settings

Password: Enter a password for the user. Minimum and maximum length and allowable characters are based on the password policy specified in the user profile (see Password Policy).

Confirm Password: Re-enter the password.

Account Locked: This is a read-only field unless your user profile includes the Account Unlock permission. Initially this field is set to **No** to allow the user to access the system. If the user enters an incorrect password more than a specified number of times in succession, the system automatically changes this setting to **Yes**, preventing future attempts to log in.

Agent Settings

Site: Select the Site assignment for the Agent.

Teams: Select the Team assignment(s) for this agent using the drop-down list.

Skill Profile: If the optional *Skills-Based Routing* feature is enabled, you may select a skill profile for this Agent. This profile overrides any skill profile associated with the Agent at the Team level.

Agent Profile: Select an Agent Profile from the list of profiles that have been created for your enterprise. Note that although an Agent can belong to several teams, the Agent Profile defined here does not change.

Multimedia Profile: If Multimedia is enabled, you may select a multimedia profile for the Agent. This profile overrides the Multimedia Profile associated with any Team that the agent is logged into.


Multimedia Extension: If Multimedia Extensions are enabled, and a Multimedia Profile is defined, you may select a Multimedia Extension for the Agent. The list of Multimedia Extensions is populated based on the Multimedia Profile assignment. The Agent Multimedia Extension overrides the Site-level multimedia extension assignments.

Default DN: Optional. Enter the dial number associated with the agent.


External Id: Optional. Enter another means of identifying the agent, such as an employee number.

3. Click the **SAVE** button when finished.


Edit a User

1. Click on the **...** ellipsis icon next to the user listing.
2. Select the **EDIT**  option.
3. Make setting changes for the User account, as needed.
4. Click on the **SAVE** button when finished.


Copy a User

1. Click the on the **...** ellipsis icon next to the user listing.
2. Select the **COPY**  option.
3. Make changes to the settings as needed to create a new User based on the setup for the selected account.
4. Click on the **SAVE** button when finished.


Delete a User

1. Click the on the **...** ellipsis icon next to the user listing.
2. Select the **DELETE**  option.
3. Confirm the action when prompted.


Export User Setting Information to Excel

1. Click the on the **...** ellipsis icon next to the user listing.
2. Select the **EXCEL**  option to instantly create and download an Excel file to open or save.


Export User Setting Information to PDF

1. Click the on the **...** ellipsis icon next to the user listing.
2. Select the **PDF**  option to instantly create and download a PDF file to open or save.

Password Reset a User

1. Click the on the **...** ellipsis icon next to the user listing.
2. Select the **PASSWORD RESET**  option.
3. Confirm the action when prompted.

Revoke API Key for a User

1. Click the on the **...** ellipsis icon next to the user listing.
2. Select the **REVOKE API KEY**  option.
3. Confirm the action when prompted.

USER PROFILES

Users are typically contact center supervisors and managers who are responsible for day-to-day operations. They use the Management Portal to access the modules that provide them with the real-time visibility and control they need over their teams and resources. Each user account includes a user profile that specifies the password policy, as well as the level of access to Portal modules, and the access rights to entry points, queues, sites, and teams.

Agents use the Agent Desktop for handling customer interaction. An agent user account must include a user profile that specifies access to the Agent Desktop module, and must also include an Agent Profile.

Click the [Help](#) link to view setting information while you work.

MANAGE USER PROFILES

Go to [PROVISIONING > USER PROFILES](#) to open the User Profiles page.

Authorized users may have access to perform the following actions:

Add a User Profile

1. While in the [User Profiles](#) page, click on the [NEW USER PROFILE](#) button
2. Define or select the following settings, as required:

General Settings

Name: Specify the User Profile name

Description: Optional. A short description of the profile.

Password Policy: Set to *Default* or select a *Password Policy* from the drop-down list.

Status: Is set to *Active* automatically during profile creation.

Module Settings

Agent Desktop: Provides user access to the Agent Desktop.

Analyzer: Provides access to the Customer Engagement Analyzer, a reporting and analytics application used to segment, profile and visualize the data in contact center systems and identify key variables that impact productivity and desired business outcomes. The following additional permissions can be enabled for the Analyzer module:

- **Analyzer Data Exchange:** Provides access to the module for creating and modifying the Analyzer schemas.
- **Business Rules:** Enables authorized users to incorporate customer data into the CJP environment for custom routing as well as for general implementation.

Call Monitoring: Enables authorized users to silently monitor the quality of service being delivered across their multi-source contact centers. Through a simplified Web interface, users can select the queue, team, site, or agent they want to silently monitor. The following additional permissions can be enabled for the Call Monitoring module:

- **Barge-In:** Allows the user to join any call he or she is monitoring and participate in the conversation between the agent and the customer.

- **Midcall Monitor:** Allows the user to monitor a call that is already in progress and connected to an agent.
- **Whisper Coach:** Allows a user who is monitoring a call to speak to the agent handling the call without being heard by the customer.
- **Restricted Monitor Only:** Prevents users from viewing and editing monitoring schedules that they did not create.
- **View Blind Monitor Requests:** Allows the user to see the blind monitoring requests of other users.

Call Recording: Enables authorized users to record any active call that is managed by the service. Through a Web interface, authorized users can select which queue, team, site, and agent they want to record, and for what time period.

Campaign Manager: Enables authorized users to manager outbound voice and email campaigns.

Historical Reports: Provides access to reports that can be viewed online through a Web browser and downloaded to a data analysis tool such as Microsoft Excel. The following additional permissions can be enabled for the Historical Reports module:

- **Monitored Calls:** Enables the Monitored Calls page.
- **Threshold Alerts:** Enables the Threshold Alerts page and allows the user to view the threshold alerts for the entities to which the user has access.
- **Usage Metrics Report:** Allows the user to access the Usage Metrics report.

Multimedia: Provides access to MM modules (MM Provisioning, MM Agent Desktop, MM Reports) based on which of the following modules are set to **On**:

- **MM Provisioning:** Enables authorized users to view and provision resources used for email and chat.
- **MM Agent Desktop:** Enables authorized users to monitor their assigned email and chat queues and the agents assigned to those queues, reallocate and reject email contacts, approve email responses, silently monitor chat conversations, coach the agent being monitored, and join a chat in progress.
- **MM Reports:** Coming Soon.

Provisioning: Provides access to the Provisioning module, which enables authorized users to view the settings provisioned for their enterprise and to create and edit provisioned entities depending the following permissions, which are displayed when you select View or Edit:

- **Manage Entry Points/Queues:** Allows the user to create and edit Entry Points and Queues.
- **Manage Sites:** Allows the user to create and edit Sites.
- **Manage Teams:** Allows the user to create and edit Teams.
- **Manage Users:** Allows the user to create and edit User Accounts.
- **Manage User Profiles:** Allows the user to create and edit User Profiles.

- **Account Unlock:** Allows the user to lock and unlock user accounts that have been locked because the user entered an incorrect password more than a specified number of times in succession (determined by the value of the Maximum Invalid Attempts setting in the password policy assigned to the user in the Password Policy).
- **Password Reset:** Allows the user to reset or reassign passwords for agents at the sites and on the teams to which the user has access.
- **DN Mapping:** Allows the user to map DNs to entry points.
- **Manage Dial Plans:** Allows the user to create and edit dial plans.
- **Audit Trail:** Allows users to access the Audit Trail interface where they can view details about provisioning changes made for their enterprise.
- **Branding:** Provides access to the Custom Theme settings on the Management Portal landing page where the user can customize the banner color and images used on Management Portal pages.
- **Manage Tenants:** Allows the user to edit some of the Tenant settings on the Provisioning > Tenant Name page.
- **Revoke API Key:** Allows the user to revoke the API key of a user account.

Real-Time Reports: Provides real-time visibility into contact center activity throughout the enterprise. Using a standard Web browser, authorized users can access call statistics for each site, team, agent, queue, and entry point, and can view current call volume and threshold adherence. The following additional permissions can be enabled for the Real-Time Reports module:

- **Agent State Change:** Allows the user to log out agents from the Real-Time Reports module.
- **Real-Time Threshold Alerts:** Enables the Threshold Alerts page and allows the user to view the threshold alerts for the entities to which the user has access.
- **Web Callback Report:** Provides access to the Web Callback Report.
- **Summary View:** Enables the agent summary view (In IVR, In Queue, Connected and Available Agents) to be displayed on the Management Portal landing page.

Recording Management: Provides access to the Recording Management module, which enables authorized users to search for and play audio files recorded through the Call Recording feature. The following additional permissions can be enabled for the Recording Management module:

- **Manage Recordings:** Allows the user to delete and restore recordings.
- **Tags:** Allows the user to access the Tags tab to view, create, and edit tags that can be assigned to audio files for use as search criteria.
- **Custom Attributes:** Allows the user access the Custom Attributes tab to create and modify custom attributes whose values can be saved with recordings and later searched.
- **Security Keys:** Allows the user access the Security Keys tab to view and change the schedule for generating security key pairs.

Release Notes: Provides access to release notes.

Routing Strategy: Provides access to the Web-based user interface for managing and configuring call-handling strategies. Authorized users can create and schedule global call-routing and team capacity strategies and alter them in real time in response to changes in business dynamics. The following additional permissions can be enabled for the Routing Strategy module:

- **Manage Call Flow Scripts:** Enables the user to upload and update call control scripts so they can be used in routing strategies. A control script defines how calls are handled.
- **Manage Media Files:** Enables the user to upload and update resources such as audio-on-hold files to make them available for use in routing strategies. Resource files with an extension of .wav, .ulaw, .au, .php, and .xml are supported, as well as other formats, depending on how the Tenant's system is configured.

Workforce Optimization: Provides access to Workforce Management, Quality Management, and WFO Analytics, including Speech, Text, and Desktop Analytics.

Access Rights

Entry Points: Select *All* or select specific *Entry Points* the user type will have access to via the drop-down list. Incorrectly selected items may be removed by clicking the adjacent X in the selected list.

Queues: Select *All* or select specific *Queues* the user type will have access to via the drop-down list. Incorrectly selected items may be removed by clicking the adjacent X in the selected list.


Sites: Select *All* or select specific *Sites* the user type will have access to via the drop-down list. Incorrectly selected items may be removed by clicking the adjacent X in the selected list.

Teams: Select *All* or select specific *Teams* the user type will have access to via the drop-down list. Incorrectly selected items may be removed by clicking the adjacent X in the selected list.

3. Click on the **SAVE** button when finished to submit the new User Profile.


View a User Profile

While in the *User Profiles* page:

1. Click on the **...** ellipsis icon next to an item.
2. Select the **VIEW**  option to review all settings in the User Profile.


Copy a User Profile

While in the *User Profiles* page:

1. Click on the **...** ellipsis icon next to an item.
2. Select the **COPY**  option.
3. Make changes as needed to create a new User Profile based on the selected item.
4. Click on the **SAVE** button when finished.


Edit a User Profile

While in the *User Profiles* page:

1. Click on the **⋮** ellipsis icon next to an item.
2. Select the **EDIT**  option.
3. Make changes as needed to the settings for the selected User Profile.
4. Click on the **SAVE** button when finished.

Delete a User Profile

While in the User Profiles page:

1. Click on the **⋮** ellipsis icon next to an item.
2. Select the **DELETE**  option.
3. Confirm the action when prompted.

WORK TYPES

Work Types are associated with Idle or Wrap-Up Codes. The value defined here can be selected in the auxiliary code settings and then used to group the codes that are associated when running Auxiliary Reports.

Click the [Help](#) link to view setting information while you work.

MANAGE WORK TYPES

1. Go to [PROVISIONING > WORK TYPES](#).

Authorized users may have access to perform the following actions:



Add a Work Type

While in the Work Types page:

1. Click on the [NEW WORK TYPE](#) button.
2. Name: Enter the name of the new Work Type to display in lists.
3. Description: Optional. Enter a short description of the purpose.
4. Type: Define the Auxiliary code type, either *Idle Code* or *Wrap Up Code*.
5. Click on the [SAVE](#) button when finished.



Edit a Work Type

While in the Work Types page:

1. Click on the  ellipsis icon next to an item.
2. Select the [EDIT](#)  option.
3. Make changes as needed to the settings for the selected Work Type.
4. Click on the [SAVE](#) button when finished.

Delete a Work Type

While in the Work Types page:

1. Click on the  ellipsis icon next to an item.
2. Select the [DELETE](#)  option.
3. Confirm the action when prompted.

AUXILIARY CODES

Auxiliary Codes page in the Provisioning module provides access to define and manage Idle and Wrap-Up Codes. These codes are made available for selection in User Profiles, and then by Agents assigned to those profiles when they are logged into the Agent Desktop. These codes are useful for tracking Agent activity in Reports.

Click the [Help](#) link to view setting information while you work.

MANAGE IDLE CODES

1. Go to [PROVISIONING > AUXILIARY CODES](#) to view the *Aux Codes* page.
2. Choose the list viewing option **Idle Codes** at the top of the page.

Authorized users may have access to perform the following actions:

Add an Idle Code

While viewing the *Idle Codes* list in the Aux Codes page:

1. Click on the [NEW IDLE CODE](#) button.
2. Enter or select the following:

Name: Enter a name for the code that will display in lists and reports.

Description: Optional. Type a short description of the purpose.

Type: Select the *Idle Code* type.


Is Default: If **Yes**, this code is used automatically as the initial idle code for Agents with this code assigned in their Agent Profile.

Is System: Select **Yes** if this code will be the system code used by the Multimedia subsystem.

3. Click [SAVE](#) when finished to submit the new Idle Code.


Edit an Idle Code

While viewing the *Idle Codes* list in the Aux Codes page:


1. Click on the **...** ellipsis icon next to an item.
2. Select the [EDIT](#)  option.
3. Make changes as needed to the selected item.
4. Click on the [SAVE](#) button when finished.

Delete an Idle Code

While viewing the *Idle Codes* list in the Aux Codes page:

1. Click on the **...** ellipsis icon next to an item.
2. Select the [DELETE](#)  option.
3. Confirm the action when prompted.


MANAGE WRAP UP CODES

1. Go to [PROVISIONING > AUXILIARY CODES](#) to view the *Aux Codes* page.
2. Choose the list viewing option  [Wrap Up Codes](#) at the top of the page.

Authorized users may have access to perform the following actions:



Add a Wrap Up Code

While viewing the *Wrap Up Codes* list in the *Aux Codes* page:

1. Click on the [NEW WRAP UP CODE](#) button.
2. Enter or select the following:
 - Name: Enter a name for the code that will display in lists and reports.
 - Description: Optional. Type a short description of the purpose.
 - Type: Select the  *Wrap Up Code* type.
 - Is Default: If **Yes**, this code is used automatically as the Wrap Up code for Agents with this code assigned in their Agent Profile.
 - Is System: Select **Yes** if this code will be the system code used by the Multimedia subsystem.
3. Click [SAVE](#) when finished to submit the new Wrap Up Code.



Edit a Wrap Up Code

While viewing the *Wrap Up Codes* list in the *Aux Codes* page:

1. Click on the  icon next to an item.
2. Select the [EDIT](#)  option.
3. Make changes as needed to the selected item.
4. Click on the [SAVE](#) button when finished.

Delete a Wrap Up Code

While viewing the *Wrap Up Codes* list in the *Aux Codes* page:

1. Click on the  icon next to an item.
2. Select the [DELETE](#)  option.
3. Confirm the action when prompted.

AGENT PROFILES

The initial setup for Agent Profiles is defined by the organization and put in place by the service provider during system implementation. Some users may have access to review and manage Agent Profiles.

An Agent Profile is a group of permissions and Agent Desktop behaviors that can be assigned to specific agents. Each agent profile specifies the permissions relating to queue transfers, agent consults and transfers ("buddy teams"), wrap-up and idle codes, wrap-up timeout values, agent auto-available, dialing capabilities and behaviors, restrictions on the DN the agent can enter to log into the Agent Desktop, and access authorizations to review current personal, queue, and team statistics. Agent profiles can be site-specific or used by all within the enterprise.

Click the [Help](#) link to view setting information while you work.

MANAGE AGENT PROFILES

Go to [PROVISIONING > AGENT PROFILES](#) to open the *Agent Profiles* page. Authorized users may have access to perform the following actions to manage Agent Profile settings:

Add an Agent Profile

1. Click the [NEW AGENT PROFILE](#) button.
2. Define the following, as required or needed:

General Information tab (basic settings and defaults)

Name: Required. A unique title displayed in lists.

Description: Optional. Type a short description of the Agent Profile.

Status: (Status is automatically set to Active when created)

Parent Type: Select Tenant (all sites) or Site (and choose a Parent Name of the Site)

Parent Name: Select the Site name.

Screen Popups: Select **Yes** to allow external pop-up screens; Select **No** to disallow pop-ups.

Last Agent Routing: (Available if *Last Agent Routing* is enabled for the Tenant) Select **Yes** to include the Last Agent Routing checkbox that allows Agents to select if they wish the caller to be routed to them next time during Wrap Up, or select **No** if that checkbox is not to be displayed.

Auxiliary Codes

Wrap Up Settings: Select *Auto Wrap Up with Time Out Of* (and enter the number of seconds the agent has to override the default code with an alternate entry) or *Manual Wrap Up* (to allow agents to always select a code at Wrap Up.)

Agent Available After Outdial: Select **Yes** (to place Agents in Available unless they set to Idle) or Select **No** (to set agents to Idle after wrap-up of an outdial call)

Allow Auto Wrap Up Extension: Select **Yes** to allow Agents to have access to the Cancel Auto Wrap Up option and extend the Wrap Up time while in Auto-Wrap-Up mode.

Wrap Up Codes: Select **All** to make all Wrap-Up codes available, or **Specific** and choose the codes that will be available to Agents from the drop-down list. Note: The Default Wrap Up Code

used for Auto Wrap Up must be included as a selected code. If selected in error, a code can be removed from the selected list by clicking the **x** next to the item

Idle Codes: Select *All* or *Specific* and choose codes from the drop-down list. If selected in error, a code can be removed from the selected list by clicking the **x** next to the item...

Collaboration tab

Entry Point/Queue Transfer Targets: Select from *None*, *All*, or *Specific* and choose the entry points and queues from the drop-down list.

Buddy Teams: Select from *None*, *All*, or *Specific* and choose the Team(s) from the drop-down list.

Consult To Queue: (for queues with Teams serving them) Click to set to Yes if Agents should have access to select a queue as a target for a consultation. (must be an inbound queue)

Dial Plan tab (define permissions for agent dial plan usage)

Outdial Enabled: (where Outdial service is setup) Select No to disallow dialpad usage or Yes to allow outdial calls, and...

Outdial Entry Points: select the outdial entry point the agent will use.

Address Book: Select the option with the phone numbers/contacts the agent needs to make Outdial and Consult calls, or select *None* for no address book access. **Note**: *If the Outdial Enabled setting is set to No, the agent will be able to use the address book for consults and transfers, but not for outbound calls.*

Dial Plan Enabled: Set to Yes if ad-hoc outdial calls, or No to disable Ad-hoc outdial calls (Agents can still use the Address book to select any outdial numbers if *Outdial Enabled* is set to Yes)

Select Dial Plan: (available if *Dial Plan Enabled* is set to Yes) Select the appropriate Dial Plan(s) agents can use to enter phone numbers or for login validation.

Outdial ANI: (available if *Outdial Enabled* is set to Yes) Optional. Select the Outdial ANI (caller ID) number(s) the agent can choose to display to outdial call recipients...

Agent DN Validation tab (login validation settings)

Validation for Agent DN: Select from Unrestricted (to allow agents to use an DN to log into the Agent Desktop), Provisioned Value (Agent must use the DN assignment for login), or Validation Criteria (restricts login to the format defined below)

Validation Criteria: (when Validation Criteria is selected above) Select from *All* (allows agent to use all available DN formats) or *Specific* and choose the allowed formats in the drop-down list...

Agent Viewable Statistics tab (define agent access to team, queue, etc. statistics and recordings)

Agent Statistics: Select Yes to enable agent(s) to display the **AGENT PERSONAL STATISTICS TAB** in Agent Desktop, or select No to disable this function. (The following Statistics setting options will only show if set to Yes.)

Queue Statistics: Select from *All* (agent can see statistics in the Agent Personal Statistics tab for all queues they access), *None* (agent cannot see queue statistics), or *Specific* and choose from the Select Queues drop-down list.

Logged-in Team Statistics: Allow access to view statistics for the team the agent is currently logged into - Select **Yes** to allow agent to view those statistics or select **No** to disallow this view. (This setting is independent of the Team Statistics settings below)

Team Statistics: Select from **All** (see statistics for all teams), **None** (and set the Logged-in Team Statistics field to No to disallow no team statistics views), **Specific** and choose the allowed teams from the drop-down list, or to only allow the Logged-in team statistics to show, leave the list blank with the adjacent logged-in team Statistics field set to **Yes**.

Access to Recordings: (only available where Agent Access to Recordings is in use) Select **Yes** to allow agent to access recordings of calls handled within the past 24 hours.

Agent Threshold tab (define the alerts an agent can see in the Agent Desktop > Agent Personal Statistics Tab – available if Threshold Alerts are in use by the Tenant)


Agent Viewable Threshold Alerts: Select the alert rules agents should see in the Agent Personal Statistics tab when breached.

Enable Agent Threshold Alerts: Select **Yes** to send alerts to the Agent's supervisor when the alert selected above are breached, or **No** to only display to the Agent...

3. Click the **SAVE** button when finished to submit the new Agent Profile.

Edit an Agent Profile

In the Agent Profile list:

1. Click on the **⋮** ellipsis icon next to an item.
2. Select the **EDIT**  option.
3. Make name, description, and any setting changes, as needed.
4. Click the **SAVE** button when finished.


Copy an Agent Profile

In the Agent Profile list:

1. Click on the **⋮** ellipsis icon next to an item.
2. Select the **Copy**  option.
3. Make changes to the **Name**, **Description** and all **Settings** as needed for the new Agent Profile you'll create based on the selected item.
4. Click the **SAVE** button when finished.

Delete an Agent Profile

In the Agent Profile list:

1. Click on the **⋮** ellipsis icon to the left of a listed item.
2. Select the **DELETE**  option
3. Confirm the action when prompted. **Note:** Agent profiles cannot be deleted if they are currently in use by any entities within the system.

PASSWORD POLICY

A password policy is a set of rules governing the required length, valid characters, valid duration, and all other characteristics of passwords. A Password Policy is assigned to a User Profile which can then be assigned to a User.

Click the [Help](#) link to view setting information while you work.

MANAGE PASSWORD POLICIES

Go to [PROVISIONING > PASSWORD POLICY](#) to open the *Password Policy* page.

Authorized users may have access to perform the following actions to manage Password Policy settings:

Add a Password Policy

1. Click the [NEW PASSWORD POLICY](#) button, enter the *Name*, *Description*.
2. Define the following, as needed:

Is Default: Click within this checkbox to set this policy as the default password policy for all user accounts assigned to it.

Password Length: Specify a minimum number of characters that are required.

Number of Passwords Remembered: Specify the number of unique passwords a user must create before a previous password can be reused.


Maximum Invalid Attempts: Set the number of times a user can enter an incorrect password before being locked out.

Password Expiry Period: Set the number of days a password is valid before a user must change it.


Must Contain At Least One...: Click within the desired checkboxes to select **Yes** or **No** to include a requirement of at least One Uppercase Letter, One Lowercase Letter, and/or One Digit in the password.

3. Click the [SAVE](#) button when finished to submit the new information.

Edit a Password Policy

1. Click on the **⋮** ellipsis icon next to a listed Password Policy.
2. Select the [EDIT](#)  option.
3. Make changes, as needed.
4. Click the [SAVE](#) button when finished to submit the new information.

Delete a Password Policy

1. Click on the **⋮** ellipsis icon to the left of a listed item.
2. Select the [DELETE](#)  option.
3. Confirm the action when prompted.

BUSINESS METRICS

If the Tenant uses the Scorecard Routing add-on, **BUSINESS METRICS** can be added for use in call routing decisions.

Click the [Help](#) link to view setting information while you work.


MANAGE BUSINESS METRICS

1. Go to [PROVISIONING > BUSINESS METRICS](#) to open the *Business Metrics* page.
2. Select an action to perform. Authorized users may have access to perform the following actions to manage Business Metrics settings:


Add a Business Metric

1. Click on the [NEW BUSINESS METRIC](#) button.
2. Enter the *Name*.
3. Select a *Variable Type*.
4. Click [SAVE](#) to submit the new listing.


View Business Metric Settings

1. Click on the **...** ellipsis icon adjacent to the listing
2. Select the [VIEW](#)  option and review the information.

Edit a Business Metric

1. Click on the **...** ellipsis icon adjacent to the listing
2. Click on the [EDIT](#)  option.
3. Make changes to the *Name*, *Variable Type* (if it is not currently referenced by a routing strategy) and/or *Status*.
4. Click on the [SAVE](#) button to submit the changes.

Delete a Business Metric

1. Click on the **...** ellipsis icon adjacent to the listing.
2. Select the [DELETE](#)  option.
3. Confirm the action when prompted.

Note: A team cannot be deleted if it is in use and a deleted team continues to be visible in historical reports and within the Teams list (as Not Active).

ADDRESS BOOK

Address books can be created to offer Agents a way to select an entry within the address book to use like Speed Dial instead of dialing a number in the *Start a new call* or *DN field*. The number of address books that you can create is determined by the *Maximum Address Books* value provisioned in the Tenant settings for your enterprise (see [Tenant Settings](#)). Address books can be made available to all sites or only to a specific site. An Address Book may also be added to an Agent Profile and then the Agent Profile can be assigned to the Agent(s).

Click the [Help](#) link to view setting information while you work.



MANAGE ADDRESS BOOKS

1. Go to [PROVISIONING > ADDRESS BOOK](#) to open the *Address Book* page.
2. Authorized users may have access to perform the following actions to manage Address Book settings:



Add an Address Book

1. Click the [NEW ADDRESS BOOK](#) button
2. Define or select from the following, as required or preferred:
 - *Name*: The title to display in lists.
 - *Description*: A short description of the purpose.
 - *Parent Type* (*Tenant* for all sites or *Site*).
 - *Parent Name* to specify a *Site*.
3. Click on the [SAVE](#) button when finished.

Edit an Address Book

1. Click on the  ellipsis icon next to a listed address book
2. Select the [EDIT](#)  option.
3. Make setting changes as needed.
4. Click the [SAVE](#) button when finished to submit the new information.

Delete an Address Book

1. Click on the  ellipsis icon to the left of a listed item.
2. Select the [DELETE](#)  option.
3. Confirm the action when prompted.

OUTDIAL ANI


The Outdial ANI list feature provides a way for an agent to select the caller ID that displays to the recipient of an outdial call. Each Outdial ANI list can be added to an Agent Profile which can then be assigned to the Agent(s).

Click the [Help](#) link to view setting information while you work.



MANAGE OUTDIAL ANI

1. Go to [PROVISIONING > OUTDIAL ANI](#) to open the *Outdial ANI* page.
2. Authorized users may have access to perform the following actions to manage Outdial ANI settings:



Add an Outdial ANI

1. Click the [NEW OUTDIAL ANI](#) button.
2. Enter the list *Name* and *Description*.
3. Click the  [ADD](#) button to enter a *Name* and *phone number* combination.
4. Repeat the last step until you are finished creating the list.
5. Click on the [SAVE](#) button when finished to submit the new information.

Edit an Outdial ANI

1. Click on the  ellipsis icon next to a listing.
2. Select the [EDIT](#)  option.
3. Make changes to the name, description or list items, as needed.
4. Click on the [SAVE](#) button when finished to submit the new information.

Delete an Outdial ANI

1. Click on the  ellipsis icon to the left of a listed item.
2. Select the [DELETE](#)  option.
3. Confirm the action when prompted.

DIAL PLANS

(Optional Add-On Feature) The Dial Plan feature allows Agents (who have been assigned access in their profile) to make outdial calls by entering matching (valid text) phone numbers in the **Start a new call** field of the dialpad in Agent Desktop. Dial Plans can also be used to validate the DN an Agent uses to log into the Agent Desktop – where this has been specified in the Agent DN Validation Settings section of the Agent Profile. Dial Plans are created using Regular Expressions to define the required format for the phone number entry. Note: Help and system supplied formats are provided to assist you as you begin working with the formatting of your dial plans.

Click the [Help](#) link to view setting information while you work.

MANAGE DIAL PLANS

1. Go to [PROVISIONING > DIAL PLANS](#) to open the *Dial Plans* page.

Authorized users may have access to perform the following actions to manage Outdial ANI settings:

Add a Dial Plan

1. Click the [NEW DIAL PLAN](#) button or the button in the lower corner of the page to open the *Add New Dial Plan* dialog, Enter or specify the following:

Name: Type a descriptive name to display in lists.

Regular Expression: Enter the regular expression that defines the text format for data entry.

Prefix: Define a prefix that the system will automatically add to the entered phone number if the agent does not include it—for example, the digit 1 for long-distance calls made within the United States.

Stripped Character: Specify any characters that should be stripped from the character string entered by the Agent, like parentheses, spaces, hyphens.

2. Click the [SAVE](#) button when finished to submit the new information.

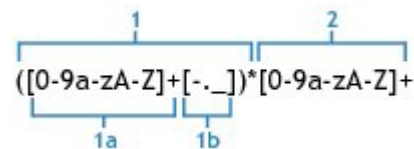
When you add a dial plan, you must create (or select) a regular expression to specify the required format(s) for the information Agents enter in the **Start a new call** field on the Agent Desktop, or to validate the DN an Agent uses to log in. Optionally, you can also specify a prefix and stripped characters. The settings for two of the system-supplied dial plan formats are shown here:

Name	Regular Expression	Prefix	Stripped Character
Any Format	<code>([0-9a-zA-Z]+[-_])*[0-9a-zA-Z]+</code>		()-
US	<code>1[0-9]{3}[2-9][0-9]{6}([1,1,10][0-9]+)(0,1)</code>	1	()-

Example System Supplied Any Format Dial Plan

The Any Format regular expression (shown first above) that is supplied within the system can be used to validate any phone number as well as the part of an email address that precedes the @ symbol. The Any Format allows text / number entries such as:

123
5551234
555-1234
8005551234
1800FLOWERS
Dave.Matthews



The regular expression breakdown looks like:

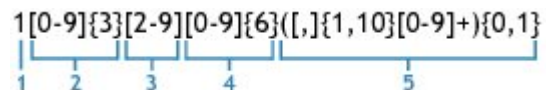
1. The input text can start with zero (0) or more sets of the following (the * means "0 or more of the preceding"):
 - 1a. one or more alphanumeric characters (0-9a-zA-Z) followed by
 - 1b. one hyphen, period, or underscore.
2. One or more alphanumeric characters (0-9a-zA-Z) must follow.

Example System Supplied US Dial Plan

The system-supplied **US** dial plan shown in the second listing of the previous illustration accepts the following types of text input:

18005551234
1-800-555-1234
1 (800) 555-1234
18005551234,,,222 (here the commas are inserted before an extension number to indicate pauses.)


The regular expression breakdown looks like:




1. The first digit must be 1.
2. Three digits 0-9 must follow.
{3} means "3 of the preceding"
3. One digit 2-9 must follow.
4. Six digits 0-9 must follow.
{6} means "6 of the preceding"
5. Zero or one of the following sequence can follow: between one and ten commas, followed by one or more digits 0-9.

Where: {1,10} means "1 to 10 of the preceding" + means "one or more of the preceding" {0,1} means "0 or 1 of the preceding"

Edit a Dial Plan

1. Click on the **⋮** ellipsis icon next to a listed Dial Plan.
2. Select the **EDIT**  option.
3. Make changes to the setup as needed.
4. Click the **SAVE** button when finished to submit the new information.

Delete a Dial Plan

1. Click on the **⋮** ellipsis icon next to the dial plan
2. Select the **DELETE**  option.
3. Confirm the action when prompted.

CAD VARIABLES

Call-Associated Data (CAD) Variables are used in call control scripts to collect Caller-entered digits collected while the call is in the IVR system, such as an account number, and/or Agent-entered data, such as a case number or action code.

CAD values are stored in the Cumulative Call Detail Records (CCDRs) that Management Portal users can display and export to Excel or .CSV files (such as Historical Reports). The system will store data for a CAD variable used in a call control script *only* if the variable name matches the name of an active CAD variable provisioned for your enterprise. See [Contact Routing](#) to review the CAD variables.

A CAD value entered by an agent during a call is saved to the database after the agent completes the Wrap-up state for that call. If Agent Desktop connectivity is lost before that point and cannot be recovered, the value entered by the agent will not be saved. If a call is transferred to another agent or queue and both agents enter or edit a CAD value, only the CAD value defined during the last completed wrap-up event by an Agent is saved to the database.

For best results, Agents who are expected to enter CAD values should not be assigned an agent profile that places them automatically in the Available state after a call (see Agent Profiles).

Note: Be aware of the following security considerations:

- Data stored through use of a CAD variable is visible to all individuals who have access to historical records on the Management Portal. Secure data such as credit card numbers, PINs, and social security numbers should not be stored through use of CAD variables.
- The CAD data will be preserved 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.

Click the [Help](#) link to view setting information while you work.

MANAGE CALL-ASSOCIATED DATA (CAD) VARIABLES

1. Go to **PROVISIONING > CALL-ASSOCIATED DATA VARIABLES** to open the CAD Variables page.

Authorized users may have access to perform the following actions to manage CAD Variables:

Add a CAD Variable

In the CAD Variables page:

1. Click on the **NEW CAD VARIABLE** button.
2. Define the following settings, as needed:

CAD Name: Enter a name that can include alphanumeric characters, hyphens, underscores, and spaces. The name cannot begin with a space, cannot have more than 1 hyphen, underscore or space in a row, and cannot be changed after it is saved. Example: 1-CAD Variable_TeamA

Description: Optional. Enter a short description for the CAD.


Agent Editable: Select **Yes** to allow agent to edit the value of the variable in Agent Desktop, or select **No** to disallow this action.

Status: Set to *Active* or *Not Active*.

3. Click on the **SAVE** button when finished to submit the new data.

Edit a CAD Variable


In the CAD Variables page:

1. Click on the **⋮** ellipsis icon next to an item.
2. Select the **EDIT**  option.
3. Make changes to the available settings as needed.
4. Click on the **SAVE** button when finished.

Disable a CAD Variable

Note: CAD variables cannot be Deleted, but the Status may be set to Not Active.

In the CAD Variables page:

1. Click on the **⋮** ellipsis icon next to an item.
2. Select the **EDIT**  option.
3. Click to change the **Status** to Not Active.
4. Click on the **SAVE** button when finished.

MULTIMEDIA PROFILES

The optional Multimedia feature enables the ContactOne system to route email, fax, and chat contacts. If Multimedia is enabled for your enterprise, each Team, Site and Agent profile can be associated with a Multimedia Profile that specifies how many of each media type the agent can handle concurrently.

Multimedia profiles can be assigned to Sites, Teams, and individual Agents. By default, the Default_Telephony_Profile is assigned to every Site. This profile cannot be edited or deleted, but an alternate Multimedia profile can be created and assigned to a Site, if needed.

Each Agent-based Team at a given Site is associated with the multimedia profile assigned to that Site unless the Team is assigned to a different multimedia profile. Likewise, each Agent logged into a Team is associated with the Team's multimedia profile unless the Agent has a different multimedia profile assignment.

Click the [Help](#) link to view setting information while you work.

MANAGE MULTIMEDIA PROFILES

1. Go to [PROVISIONING > MULTIMEDIA PROFILES](#) to view the Multimedia Profiles page.

Authorized users may have access to perform the following actions:

Add a Multimedia Profile

1. Click on the New Multimedia Profile button.
2. Define or select from the following settings in each section:

Profile Details

Name: Enter the name that will display in lists for selection.

Description: Optional. Enter a short description of the purpose.

Allow agent to simultaneously handle multiple realtime interactions: Select **Yes** to allow multiple realtime contacts to be routed to agents with this profile, or select **No** to allow only one realtime contact of any kind to be routed at a time – so an agent would not be allowed to receive a chat contact while handling a voice contact.

Media Details

Define the number of simultaneous interactions allowed for each option in this section.

Voice: Setting options are 0 or 1.

Email: Define 1 or more, or set to 0 if no contacts of that type can be sent to the Agent.

Fax: N/A – set to 0

Chat: Define 1 or more, or set to 0 if no contacts of that type can be sent to the Agent.


Video: N/A – set to 0

Others: N/A – set to 0


Note: The maximum number of media channels that can be defined here is set by the value in the *Maximum Channels Per Profile* setting in the Module Permissions section of Tenant Settings.

3. Click the [SAVE](#) button when finished to submit the new profile.


View a Multimedia Profile

1. Click on the **...** ellipsis icon next to an item you wish to review.
2. Select the **VIEW**  option to view all settings in the Profile.

Edit a Multimedia Profile

1. Click on the **...** ellipsis icon next to the profile to be modified.
2. Select the **EDIT**  option.
3. Make setting changes as needed.
4. Click the **SAVE** button when finished to submit the new information.

Delete a Multimedia Profile

1. Click on the **...** ellipsis icon next to the item to be deleted.
2. Select the **DELETE**  option.
3. Confirm the action when prompted.

MULTIMEDIA ENABLER

If Multimedia Extensions have been enabled for your enterprise, the *Multimedia Enabler* page provides access to define and maintain the settings for the multimedia enabler.

Click the [Help](#) link to view setting information while you work.

MANAGE MULTIMEDIA ENABLERS

1. Go to Provisioning > Multimedia Enabler to
2. Authorized users may have access to perform the following actions:

Add a Multimedia Enabler

1. Click the **NEW MULTIMEDIA ENABLER** button.
2. Define the following settings as required or as necessary:

General Settings

Name: Enter a short name that will display in lists and for selection.

Description: Enter a short description of the purpose.

Channel Type: Select an available option (Chat, Email...) in the drop-down list.

Media Details

Agent URL: Enter the URL that will be used for access to the real-time monitoring module provided by the multimedia enabler.

Agent Display Label: Enter a label for the link on the portal navigation bar that will provide access to the monitoring module provided by the multimedia enabler.

Provisioning URL: Enter the URL that will be used for access to the provisioning module provided by the multimedia enabler.

Display Label: Enter the label for the link on the portal navigation bar that will provide access to the provisioning module provided by the multimedia enabler.


Report URL: Enter the URL for access to the Multimedia Report module provided by the multimedia enabler.

Report Display Label: Enter the label for the link on the portal navigation bar that will provide access to the multimedia report module provided by the multimedia enabler.

3. Click the **SAVE** button when finished to submit the new Multimedia Enabler.


View Multimedia Enabler Settings

While in the Multimedia Enabler page:

1. Click on the **...** ellipsis icon next to an item.
2. Select the **VIEW**  option to review all settings.


Copy a Multimedia Enabler

While in the Multimedia Enabler page:

1. Click on the **...** ellipsis icon next to an item.
2. Select the **COPY**  option.
3. Make changes as needed to create a new Multimedia Enabler based on the settings defined in the selected item.
4. Click on the **SAVE** button when finished.


Edit a Multimedia Enabler

While in the Multimedia Enabler page:

1. Click on the **...** ellipsis icon next to an item.
2. Select the **EDIT**  option.
3. Make changes as needed to the settings for the selected Multimedia Enabler.
4. Click on the **SAVE** button when finished.

Delete a Multimedia Enabler

While in the Multimedia Enabler page:

1. Click on the **...** ellipsis icon next to an item.
2. Select the **DELETE**  option.
3. Confirm the action when prompted.

MULTIMEDIA EXTENSIONS

If your enterprise uses the Multimedia feature and Multimedia Extensions are enabled for your enterprise in the Tenant settings, Agents can be associated with a multimedia extension, which identifies the enabling module for each media type the agent can handle. Multimedia extensions can be assigned to Sites and individual Agents. Each Agent at a given site is associated with the multimedia extension assigned to that Site by default, unless the Agent has a different multimedia extension assignment in their User settings which will override the Site settings.

Click the [Help](#) link to view setting information while you work.

MANAGE MULTIMEDIA EXTENSIONS

1. Go to [PROVISIONING > MULTIMEDIA EXTENSION](#) to view the *Multimedia Extensions* page.

Authorized users may have access to perform the following actions:

Add a Multimedia Extension

1. Click the [NEW MULTIMEDIA ENABLER](#) button.
2. Define the following settings as required or as necessary:

General Settings

Name: Enter a name for the multimedia extension.

Description: Optional. Enter a description of the multimedia extension.

CAS Enabled: This field reserved for future use.

Multimedia Extension Details



Multimedia Profile: Select a multimedia profile that does not include telephony from the drop-down list. After you select a multimedia profile additional selection options for each channel type included in the profile become available below.

Multimedia Enabler: Select a multimedia channel type above, and then choose the enabler from the drop-down list. Repeat for each channel type included in the selected multimedia profile.

3. Click the [SAVE](#) button when finished to submit the new Multimedia Extension.



View Multimedia Extension Settings

While in the Multimedia Extensions page:

1. Click on the  ellipsis icon next to an item.
2. Select the [VIEW](#)  option to review all settings.

Edit a Multimedia Extension


While in the Multimedia Extensions page:

1. Click on the  ellipsis icon next to an item.
2. Select the [EDIT](#)  option.

3. Make changes as needed to the settings for the selected Multimedia Extension.
4. Click on the **SAVE** button when finished.

Delete a Multimedia Extension

While in the Multimedia Extensions page:

1. Click on the **⋮** ellipsis icon next to an item.
2. Select the **DELETE**  option.
3. Confirm the action when prompted.

SKILLS

Skills-Based Routing is an optional ContactOne feature that enables the assignment of skill requirements, such as language fluency or product expertise, to agents so that incoming calls can be distributed to agents with a matching set of skills. Skill Profiles can be assigned to teams or individual agents. Skill Profiles use the Skill Definitions currently in the system.

Click the [Help](#) link to view setting information while you work.

MANAGE SKILL DEFINITIONS

The Skill Definitions page provides an interface for managing the Skills that can be assigned to calls for routing, and the Skill Profiles which can then be assigned to teams or individual agents. **Note:** *The maximum number of active skill definitions that you can create is determined by the Maximum Skills and Maximum Text Skills values provisioned for the enterprise in Tenant Settings.*

Add a New Skill Definition

1. Go to [PROVISIONING > SKILLS > SKILL DEFINITION](#) to open the *Skill Definitions* page.
2. Click on the **NEW SKILL DEFINITION** button and specify or change the following settings:

Name: Enter a unique title that will show in lists.

Description: Type a concise description of the Skill.

Service Level Threshold: Define the number of seconds before a customer call is flagged as outside service level.


Status: (Edit mode only) Set to *Active* or *Not Active*.

Type – (Add mode only) Select from **Proficiency** (0-10 level of agent expertise in the skill), **Boolean** (Yes/No agent expertise in the skill), **Text** (must match exactly when used; 40 character/space max), or **Enum** (a listed set of values – up to 20 characters for each – example: Sales, Service, Billing, etc.).

List Values: (used with Enum) Type a value in the field and press the Enter key to add a line for another value. Click the X adjacent to a value to delete it.

3. Click **SAVE** when finished to submit the information for the Skill Definition.

Edit a Skill Definition

1. Click on the **...** ellipsis icon to the left of a listed skill.
2. Select the **EDIT**  option.
3. Make changes, as necessary.
4. Click on the **SAVE** button to when finished.

MANAGE SKILL PROFILES


A Skill Profile is a combined set of *Skill Definitions* that can be assigned to an agent-based team or to an individual agent. For example, a skill of English might be assigned a high level of proficiency in one agent's skill profile and at a lower level in the team profile. If a Skill Profile is assigned to a team, all agents logged in to that team are automatically associated with the levels defined in that Skill Profile unless an Agent is further assigned a specific skill level within their individual account settings.

Add a Skill Profile

1. Go to **PROVISIONING > SKILLS > SKILL PROFILES**.
2. Click on the **NEW SKILL PROFILE** button.
3. Click within the checkbox next to a skill to add or remove it from the profile.
4. Specify the value for each skill selection as follows:
 - Proficiency: Drag the slider to a number between 0 and 10 to indicate the actual proficiency level for this skill.
 - Boolean: Click within a radio button to specify whether the agent has the skill (True = Yes / False = No).
 - Text: Must match exactly when used; 40 character/space max.
 - Enum: Click within the checkbox(es) next to a value that represents a skill an agent with this skill Profile has, or remove a checkmark next to a value if this skill is not included.
5. Click **SAVE** when finished to submit the information for the Skill definition.

Edit a Skill Profile

While in the Skill Profiles page:

1. Click on the **...** ellipsis icon to the left of a listing.
2. Select the **EDIT**  option.
3. Make changes to settings, as needed.
4. Click on the **SAVE** button when finished to submit the changes.

THRESHOLD RULES

If the enterprise uses the Threshold Alerts feature, authorized users can create *Threshold Rules* to monitor agent and call data. When a threshold is breached, an alert is sent to the Real-Time Reports module where it can be viewed, acknowledged, and archived by authorized users. In addition, a Threshold Rule can specify one or more email addresses to which alert notifications will be sent when a threshold is breached. An Agent can view threshold alerts in the *Agent Personal Statistics* tab on the Agent Desktop if Agent Viewable is set to Yes for the Threshold Rule and the threshold alert is selected in the Agent Profile that is assigned to the Agent.

Threshold rules can be configured for Call and Agent Metrics.

The maximum number of threshold rules that can be created is determined by the *Maximum Threshold Rules* value provisioned for your enterprise in Tenant Settings.

Click the [Help](#) link to view setting information while you work.

MANAGE THRESHOLD RULES

1. Go to [PROVISIONING > THRESHOLD RULES](#).

Authorized users may have access to perform the following actions:

Add a Threshold Rule

While in the Threshold Rules page:

1. Click on the New Threshold Rule button.
2. Define the following settings as required or desired in each section for the new rule:

General Settings

Name: Enter a name for the rule that will display in lists.

Description: Optional. A short description of the rule.

Agent Viewable: Select Yes or No to specify whether an alert can be viewed by Agents. If set to Yes, the Agent Threshold option becomes available for when adding or editing Agent Profiles.

Entity Type: Select the Entity Type that the threshold rule will apply to: *Entry Point*, *Queue*, *Site*, *Team*, or *Agent* if your enterprise uses the Agent Threshold Alerts feature.

Entity Information

Metric Type: Select *Agent Threshold* or *Call Threshold*.

Entity: For Call rules - Select the appropriate option from the drop-down list.

Threshold Information

Threshold Metric: Select a value (e.g.: Abandoned Calls or Longest Time in Queue...) from the drop-down list. The list displays only those metrics that are applicable to the selected entity type.

Operand: Select a value from the drop-down list. The options include

> greater than >= greater than or equal to < less than
 = equal to <= less than or equal to

Trigger Value: Specify the value that will trigger a threshold alert. The value type (duration, count, or percentage) is based on the metric selected here. 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. The following table list metrics, the entity types and their trigger values:

Metric	Entity Type	Trigger Value Type
Call Metrics		
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 Or Queue	Count
Transferred Calls	Queue	Count
Agent Metrics		
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	
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

Trigger Interval: Specify the interval, in seconds, during which the system will generate only one alert for the threshold rule check.

Email Information


Notification Receivers: Enter the email address and then press Enter. Repeat for each additional address you want to include. To remove an address, click the x on the left side of the listed address.

Text Notification Receivers: Enter the contact information and then press Enter. Repeat for each additional receiver you want to include. To remove an entry, click the x on the left side of the listing.

3. Click the **SAVE** button when finished to submit the new Threshold Rule.


Edit a Threshold Rule

While in the Threshold Rules page:

1. Click on the **...** ellipsis icon to the left of a listing.
2. Select the **EDIT**  option.
3. Make changes to settings, as needed.
4. Click on the **SAVE** button when finished to submit the changes.


Copy a Threshold Rule

While in the Threshold Rules page:

1. Click on the **...** ellipsis icon next to an item.
2. Select the **Copy**  option.
3. Make changes to settings as needed for the new Threshold Rule you'll create based on the selected item.
4. Click the **SAVE** button when finished.

Delete a Threshold Rule

While in the Threshold Rules page:

1. Click on the **...** ellipsis icon to the left of a listed item.
2. Select the **DELETE**  option.
3. Confirm the action when prompted.

DN TO ENTRY POINT MAPPING

Each DN (ingress toll-free or DID number) that arrives at an entry point in the ContactOne system must be mapped to the entry point before the entry point can be used. The DN Mappings page provides an interface for adding, editing, and viewing the mappings between DNs and entry points. You can also add and remove multiple DN mappings in bulk using a .CSV file.

Note: *Changes to DN mapping will update during the system's hourly synchronization cycle.*

Click the [Help](#) link to view setting information while you work.

MANAGE DN TO ENTRY POINT MAPPING

1. Go to [PROVISIONING > DN TO ENTRY POINT MAPPINGS](#). The DN to Entry Point Mappings List page appears displaying a list of all DNs in the system. Authorized users may be able to complete the following actions:



Filter the DN to Entry Point Mapping List

Options: Select an option in the Entry Point drop-down, Select the Not Mapped option to display only unmapped DNs, Select Site (if site level DN is in use), and/or Enter text in the Search field. Click [SEARCH](#) when ready to view the filtered list.



Add a DN to Entry Point Mapping

1. Click on the [ADD NEW DN TO EP MAPPING](#) button.
2. Enter the DN number (11 digits, no spaces/symbols).
3. Select Tenant or select Site Level and choose a Site.
4. Select the Entry Point from the list or choose None if you wish to return and map the entry point later.
5. Click the [SAVE](#) button to submit.

Edit a DN to Entry Point Mapping

1. Click on the  ellipsis icon adjacent to the listing.
2. Click on the [EDIT](#)  option.
3. Make changes as needed.
4. Click the [SAVE](#) button when finished.

Delete a DN to Entry Point Mapping

1. Click on the  ellipsis icon adjacent to the listing.
2. Select the [DELETE](#)  option.
3. Confirm the action when prompted.

Upload Multiple DN to Entry Point Mappings

ContactOne allows authorized users to add and remove multiple DN to EP mappings by submitting a formatted .CSV file using the *Bulk Upload* option.

1. Create and save .CSV file to a local folder on your system. This .CSV file will contain new-line separated entries with comma separated values. Each line must include the DN number and entry point ID pair separated by a comma and no spaces in between. For example:

```
8005551234,AVx90dWsbxpvzWSp3TSo
```

```
8005552345,AVx9qUofbxpvzWSp3TST
```

2. Go to [PROVISIONING > DN TO ENTRY POINT MAPPINGS](#).
3. Click on the [BULK UPLOAD](#) button on the upper right side of the DN to Entry Point Mapping page to display the bulk upload settings.
4. Specify the following settings:

Operation: Select the appropriate option to either *Add* new DN mappings or *Remove* DN Mappings

File Location: (Site Level DN only) Select either *Tenant* or select *Site Level* and then choose the Site.

Upload File: Click the [BROWSE](#) button, navigate to the file location of your .CSV File, and select it.

5. Click the [UPLOAD](#) button to submit the new changes to DN Mappings and close the dialog.

ENTRY POINT / QUEUE GROUPS

The Entry Point/Queue Group page provides an interface for creating group names for use with the optional Map View and Billing Report features. After you add an Entry Point/Queue group, the group name becomes available for selection in the settings available when you add or edit an entry point or queue.

Click the [Help](#) link to view setting information while you work.

MANAGE ENTRY POINT/QUEUE GROUPS

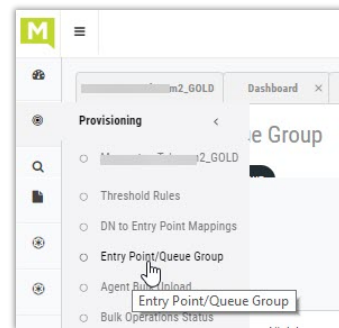
1. Go to [PROVISIONING > ENTRY POINT/QUEUE GROUP](#).

Authorized users may have access to complete the following tasks for Entry Points or Queues:

Add a Group


While in the Entry Point/Queue Groups page:

1. Select the [NEW ENTRY POINT/QUEUE GROUP](#) button
2. Enter the *Name*
3. Select the *Type* – Billing or Map
4. Click the [SAVE](#) button to submit the new group.





Edit a Group

While in the Entry Point/Queue Groups page:

1. Click on the **⋮** ellipsis icon adjacent to the Group listing.
2. Click on the [EDIT](#)  option.
3. Make changes as needed.
4. Click [SAVE](#) to submit the changes.


Block Area Codes for a Group


While in the Entry Point/Queue Groups page (Note: admin access required)

1. Click on the **⋮** ellipsis icon adjacent to the listing.
2. Click on the [Edit](#)  option to view the settings.
3. Click on the [EDIT](#)  icon for *Choose Area Codes* to open the edit dialog.
4. Select a *State* and then select one or more *Area Codes*.
5. Repeat for additional *States* and *Area Codes*.
6. Click on the [SAVE](#) button to submit the blocked area codes and return to the list view.
7. Click the [SAVE](#) button at the bottom of the list to submit all changes and update the list.

Delete a Group

While in the Entry Point/Queue Groups page:

1. Click on the **⋮** ellipsis icon adjacent to the listing.
2. Click on the **DELETE**  option.
3. Confirm the action to set the Group to **Not Active**.

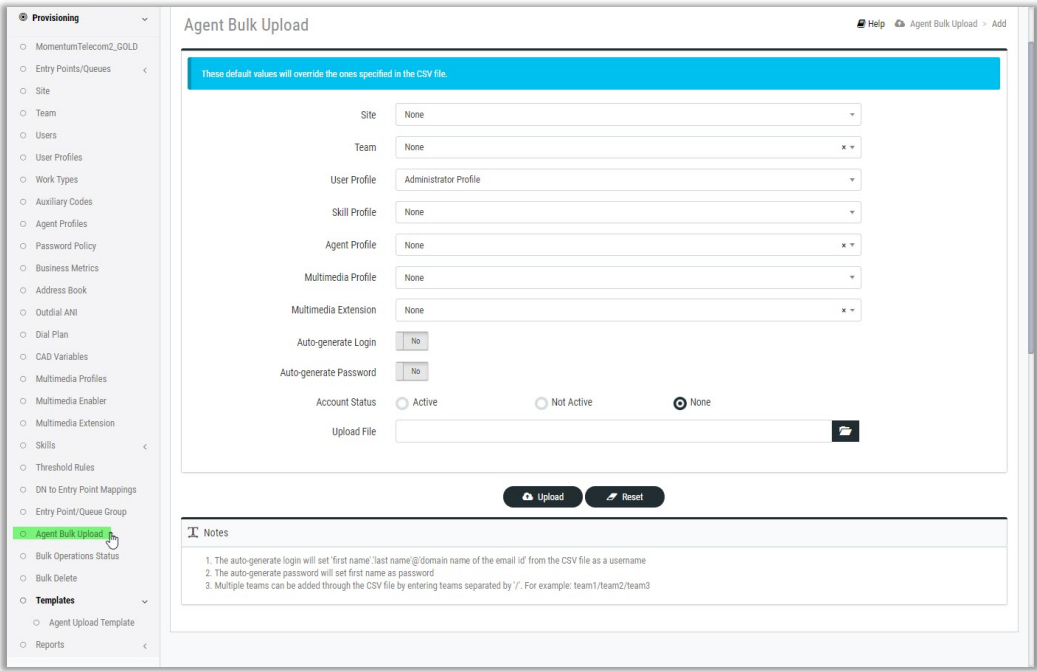
If the selection is currently being referenced by other entities, it cannot be deleted until those associations are removed. A message informs the user if this is the case, and provides more information  to review the associated entities.

AGENT BULK UPLOAD

Rather than adding agents individually, authorized users can upload provisioning information for multiple agents using a formatted .CSV file via the Provisioning Module.

Click the [Help](#) link to view setting information while you work.

1. Go to **PROVISIONING > AGENT BULK UPLOAD**. Authorized users may have access to use the Agent Bulk Upload features to add or delete the information for multiple agents simultaneously.



The screenshot displays the 'Agent Bulk Upload' configuration interface. On the left is a navigation menu with 'Agent Bulk Upload' highlighted. The main area contains a form with the following fields and options:

- Site:** None (dropdown)
- Team:** None (dropdown)
- User Profile:** Administrator Profile (dropdown)
- Skill Profile:** None (dropdown)
- Agent Profile:** None (dropdown)
- Multimedia Profile:** None (dropdown)
- Multimedia Extension:** None (dropdown)
- Auto-generate Login:** No (checkbox)
- Auto-generate Password:** No (checkbox)
- Account Status:** Active, Not Active, None (radio buttons)
- Upload File:** File upload field with a trash icon

Buttons for 'Upload' and 'Reset' are located below the form. A 'Notes' section at the bottom contains the following text:

1. The auto-generate login will set 'first name','last name'@'(domain name of the email id)' from the CSV file as a username
2. The auto-generate password will set first name as password
3. Multiple teams can be added through the CSV file by entering teams separated by ';'. For example: team1/team2/team3

2. Enter, define or select from the following default values for the following settings:

Note: *These settings will override any that are specified in a .CSV file that is uploaded in the bulk operation.*

Site: Choose the correct site to use for this upload.

Team: Select the default team to use for this upload.

User Profile: Select the default Profile Type to use for this upload.

Skill Profile: Select the default Skill Profile to use for this upload.

Agent Profile: Select the default Agent Profile to use for this upload.

Multimedia Profile: Select the default multimedia Profile to use for this upload.

Multimedia Extension: Select the default multimedia Extension to use for this upload.

Auto-generate Login: Select **Yes** or **No**. (The auto-generate login will set 'first name'. 'last name'@'domain name of the email id' from the CSV file as a username)

Auto-generate Password: Select **Yes** or **No**. (The auto-generate password will set first name as password.)

Account Status: Select the default status for this operation (*Active*, *Not Active*, or *None* to use the information provided in a .csv file upload).

3. **Upload File:** Optional. Click on the **FILE FOLDER** icon to navigate to and select the .CSV file for Bulk Upload.
4. Click the **UPLOAD** button to submit the operation. A message displays at the top of the view that an upload operation has commenced and providing the file ID for review.

BULK OPERATION STATUS

The Bulk Operations Status page displays the details about each agent you attempted to add, delete, unlock, or change the password for, including whether the addition or deletion was successful, and if a deletion failed, the reason for the failure.

Click the [Help](#) link to view setting information while you work.

After performing a bulk operation to add, delete, unlock, or change the password for multiple agents, you can check the status of the operation as follows:

1. Go to **PROVISIONING > BULK OPERATIONS STATUS**.
2. Choose from the following to filter the list or locate a specific batch:
 - **Operation Type:** Select an option from the drop-down list to show only that type of operation.
 - **Batch Name:** Select from the options available in the drop-down list.

Or use the **Search** tool to look for text within the list.

Any Bulk Operations batches that match your criteria will be displayed for review in the list below. Information about the status, error messages, reasons, etc. is also available for review for each batch.

BULK DELETE

The Bulk Delete page offers a simple way to delete multiple agent accounts assigned to a Site.

Click the [Help](#) link to view setting information while you work.

1. Go to **PROVISIONING > BULK DELETE**.
2. Choose a **Site**: Select the site/location from the drop-down list. The list of Agents assigned to that site displays.
3. Select the Agents to be deleted using one or more of the following methods:
 - **Individual**: Click to place a check in the box next to an Agent Name to select it.
 - **All**: Click to place a check in the box next to the **Username** column header to select All Agents in this list.
 - **Unselect**: Click within a selected checkbox to remove the check and unselect it.
 - **Reset**: Click on the refresh button at the bottom of the page to start over.
4. Click the **DELETE** button at the bottom of the page when all selections are made.
5. Confirm the action when prompted.

A message on the upper-right side of the page displays the batch name for the initiated bulk operation. The Operation status can be reviewed in the *Bulk Operations Status* page.

TEMPLATES

The Templates option in Provisioning allows users to download a prepared Bulk Upload template .CSV file to use for Agent Bulk Upload or Bulk Delete.

Click the [Help](#) link to view setting information while you work.

UPLOAD A .CSV TEMPLATE FILE

1. Go to **PROVISIONING > TEMPLATES > AGENT UPLOAD TEMPLATE**.
2. Click on the file upload message at the bottom of the browser.
3. Specify whether to **Save** the file to your system or just **Open** it within the download dialog.
4. View the .CSV file. The Agent Bulk Upload template contains pre-set columns for data entry in the correct format, including:
 - **FIRST_NAME**: Enter the agent's first name.
 - **LAST_NAME**: Enter the agent's last name.
 - **LOGIN_NAME**: Enter the agent's login name.
 - **EMAIL_ID**: Enter the agent's email address.

- **DEFAULT_DN:** Enter a numerical value representing the extension number associated with the agent.
 - **ACCOUNT_STATUS:** Enter 0 (inactive) or 1 (active).
 - **PASSWORD:** Enter a password for the agent.
 - **SITE_NAME:** Enter the site name.
 - **TEAM_NAME:** Enter the name of the team or teams to which the agent belongs. When specifying multiple teams for an agent, enter them in this format: team1/team2/team3/... (using a '/' forward slash to separate the team names).
 - **SKILL_PROFILE_NAME:** Enter the name of a skill profile (available only if your enterprise uses the optional skills-based routing feature).
 - **AGENT_PROFILE_NAME:** Enter the name of an agent profile.
 - **MEDIA_PROFILE_NAME:** Enter the name of a multimedia profile (available only if Multimedia is enabled for your enterprise).
 - **MULTIMEDIA_EXTENSION_NAME:** Enter the name of a multimedia extension (available only if Multimedia Extensions are enabled for your enterprise).
 - **EXTERNAL_ID:** Optionally, enter another means of identifying the agent, such as an employee number.
5. Save the edited .CSV file to a system location after you enter the relevant information for each agent. The file can now be used to upload Agent Data.

REPORTS

The Reports section of Provisioning offers a simple way to download a full listing of the following sets of information defined in the various sections the Provisioning Module:

- Site Report
- Team Report
- Agent Report
- Inbound EP Report
- Inbound Queues Report
- Outdial EP Report
- Outdial Queues Report
- Agent Profile Report -
- Skill Report
- Skill Profile Report
- Routing Report
- Agent Skills Report

RUN PROVISIONING REPORTS

1. Go to **PROVISIONING > REPORTS >** and **SELECT A REPORT TYPE** from the list.
2. Specify the Following:
 - *Options:* Choose Download or Email me a copy of it.
 - *Export Options:* Choose Excel or PDF.
3. Click **OK** to run the report and receive it as specified.

GLOSSARY OF TERMS

ABANDONED CALL

A phone call that was in the system longer than the predefined Short Call threshold provisioned for the enterprise, but that was terminated before being distributed to a destination site. Contrast with Short Call.

ACD

See automatic call distributor (ACD).

ACT

(Average Connected Time) The average amount of time callers were connected to an agent.

ADR

See Agent Detail Record (ADR).

AGENT

A person who answers customer calls; also referred to as a customer service representative.

AGENT-BASED TEAM

A team that has a specific number of agents assigned to it. These agents use the Agent Desktop to interface with the system. See also Agent Desktop. Contrast with capacity-based team.

AGENT DESKTOP

A browser-based application for handling customer interactions on the agent's workstation. Using the Agent Desktop and any telephony device including traditional TDM, mobile or soft IP-based phones, agents have access to a full suite of contact center applications.

AGENT DETAIL RECORD (ADR)

A record representing details about an agent's activities during an agent session (that is, the time interval between when the agent logged in and logged out).

AGENT PROFILE

A group of permissions and Agent Desktop behaviors that can be assigned to specific agents. Each agent profile specifies permission levels relating to queue transfers, agent consults and transfers ("buddy teams"), wrap-up and idle codes, wrap-up time-out values, and agent auto-available.

ANI

See Automatic Number Identification (ANI).

ANSWERED CALL

A call that was routed from the queue to an agent or available resource and was answered by the agent or connected to a resource.

ASA

See Average Speed of Answer (ASA).

AUTOMATIC CALL DISTRIBUTOR (ACD)

A system or application software program that serves to route incoming calls to the most available and appropriate agent or resource according to customer-defined routing requirements.

AUTOMATIC NUMBER IDENTIFICATION (ANI)

A system utilized by telephone companies to identify the phone number of a calling subscriber.

AUXILIARY CODES

Idle and wrap-up codes that agents can select while using the Agent Desktop. See also idle code, wrap-up code.

AVAILABLE STATE

An agent state indicating that the agent is ready to take calls.

AVERAGE SPEED OF ANSWER (ASA)

The average amount of time callers waited in queue before being connected to an agent.

BARGE IN

To join a call while monitoring or coaching an agent in order participate in the conversation between the agent and the customer.

CALL-ASSOCIATED DATA (CAD) VARIABLE

A named variable provisioned for the enterprise that can be used in a call control script to collect data entered either by a caller or an agent. CAD values are stored in the cumulative call detail records that Management Portal users can display and export to Microsoft Excel or .csv files.

CALL CONTROL SCRIPT

A set of instructions for controlling the flow of calls through the ContactOne system. Call control scripts are assigned to routing strategies.

CALL DETAIL RECORD (CDR)

A record representing the history of a call within an entry point or queue. An entry point CDR stores details about the call from the time it arrived at the entry point—either as a new, external call or as a call transferred from another entry point or queue—until it left the underlying queues either by terminating or by being transferred out of a queue to another entry point. A queue CDR stores information about the call from the time it entered the queue until it was either terminated or transferred out of the queue. A queue CDR can have multiple legs, which are represented by segment detail records (SDRs). See also Segment Detail Record (SDR).

CAPACITY-BASED TEAM

A team that does not have specific agents assigned to it, and the agents do not use the Agent Desktop. For example, an outsourcer might have teams that use a PBX or an ACD to handle calls. A capacity-based team might be used to represent a voice mailbox or an agent group that is not managed by the system. The capacity of such a team is determined by the Capacity setting provisioned for it, which can be overwritten by team capacity strategies defined in the *Routing Strategy* module available from the Management Portal. See also Agent Desktop. Contrast with Agent-Based Team.

CCDR

See cumulative call detail record (CCDR).

CDR

See Call Detail Record (CDR).

COACH

To speak to the agent handling a call without being heard by the customer. Also known as whisper coach.

COMPLETED CALL

A call that ended during the report interval. This includes answered, disconnected, and abandoned calls, but not short calls or transferred calls.

CONNECTED STATE

An agent state indicating that the agent is connected with a caller.

CROSS-ACD ENTRY POINT

An entry point used in Scorecard Routing. Calls that arrive at a cross-ACD entry point can be routed to queues across multiple ACDs. Calls sent to an external ACD are distributed to agents by the external ACD. See also entry point, proxy queue, Scorecard Routing.

CUMULATIVE CALL DETAIL RECORD (CCDR)

A record representing the complete life cycle of an external call, from the time it arrived in the system until it was terminated. A CCDR can include one or more CDRs and SDRs. See also call detail record (CDR), segment detail record (SDR).

DIALED NUMBER IDENTIFICATION SERVICE (DNIS)

A service provided by the phone company that delivers a digit string indicating the number the caller dialed along with the call.

DISCONNECTED CALL

A call that was terminated within the predefined Sudden Disconnect threshold provisioned for the enterprise after being distributed to a destination site. See also Sudden Disconnect threshold.

DN

Dial number, the number that is dialed to initiate a call.

DNIS

See Dialed Number Identification Service (DNIS).

ENTERPRISE

An organization that subscribes to the service. Also referred to as the Tenant.

ENTRY POINT

The initial landing place for customer calls on the system. One or more toll-free or dial numbers can be associated with a given entry point. IVR call treatment is performed while a call is in the entry point. Calls are moved from the entry point into a queue and are subsequently distributed to agents.

HANDLED CALL

A call that was terminated after reaching the destination site and exceeding the predefined Sudden Disconnect threshold provisioned for the enterprise. The total number of handled calls is determined by subtracting the number of disconnected calls from the number of answered calls. See also answered call, disconnected call, enterprise.

IDLE CODE

A value that an agent selects while using the Agent Desktop to indicate why the agent is not available to take calls, such as Lunch, Break, or Meeting. See also Agent Desktop.

IDLE STATE

An agent state indicating that the agent is logged in but not yet ready to take customer calls.

IVR

Interactive voice response.

IVR CALL

A call that was successfully put through to the IVR system.

IVR TIME

The cumulative amount of time that calls are in the IVR system, waiting to be handled.

MANAGEMENT PORTAL

The Web-based user interface that provides authorized users with access to features and functions.

MED

Minimum expected delay, a value that represents the smallest expected time interval between the routing of a call to a queue and answering of the call by an agent resource. The routing engine calculates the MED of each queue based on the depth of the queue and the average handle time (AHA) during the most recent time interval.

MIDPOINT CALL MANAGEMENT® GATEWAY

ContactOne Communication's centralized control point for managing and monitoring calls across a heterogeneous contact center environment. This solution creates a virtual point for visibility and control, enabling enterprises to remotely manage their global contact center queues while providing improved bandwidth usage. It also provides a view into real-time and historical performance system wide, allowing service levels to be optimized across sites.

MULTIMEDIA PROFILE

A group of settings that specify the types and number of contacts an agent can handle concurrently. Multimedia profiles can be assigned to sites, teams, or individual agents. When Multimedia is enabled, each agent-based team at a site is associated with the profile assigned to that site unless the team is assigned a different multimedia profile. Similarly, each agent logged in to a team is associated with the team's profile unless the agent is assigned a different multimedia profile.

NOT RESPONDING STATE

An agent state indicating that the agent's phone rang but was not answered within a predefined period of time.

OUTDIAL CALL

A call made from the Agent Desktop by entering a phone number in the Start a new call field.

OUTDIAL RESERVED STATE

An agent state indicating that the agent has initiated an outdial call, but the call is not connected yet.

OVERFLOW NUMBER

A destination phone number, provisioned for the queue, to which a call is sent if it has been queued for longer than the maximum queue time specified in the routing strategy or because an error occurred when the call was sent to an agent.

PROXY QUEUE

A queue that represents an external ACD. In Scorecard Routing, calls that are sent to an external ACD are distributed to agents by the external ACD. Proxy queues are used to track the call activity occurring on the external ACD queues. There is no agent visibility or agent reporting for proxy queues. See also Scorecard Routing.

QUEUE

A holding place for calls while they await handling by an agent. Calls are moved from the entry point into a queue and are subsequently distributed to agents. See also entry point.

QUEUED CALL

A call that has been queued to music-on-hold or customer messaging information while waiting to be sent to a destination site.

RECORDING MANAGEMENT

A module that can be used to search for and play audio files recorded through the optional Call Recording feature.

RESERVED STATE

An agent state indicating that a call is coming through to the agent's station.

SBR

See Skills-Based Routing.

SCORECARD ROUTING

A feature that provides cross-ACD call routing. In Scorecard Routing, calls arriving at an entry point can be routed to queues across multiple ACDs. The queues receiving the calls can belong to ContactOne or non-system ACDs. Calls sent to an external ACD are distributed to agents by the external ACD. Proxy queues are used to track the call activity that occurs on those external ACD queues. See proxy queue.

SDR

See Segment Detail Record (SDR).

SEGMENT DETAIL RECORD (SDR)

A record representing one leg of a call. When an agent transfers a call to another agent, two SDRs are created—one for each leg of the call. See also call detail record (CDR), cumulative call detail record (CCDR).

SERVICE LEVEL

The percentage of calls for a queue or skill that were distributed to a site and were answered by agents within the predefined Service Level threshold provisioned for the queue or skill. Abandoned calls are included in service-level calculations. See also skill.

SERVICE LEVEL THRESHOLD

A threshold provisioned for a queue or skill that is used to calculate service level values. If a call is completed within the time interval set for this threshold, it is considered to have been handled within service level. See also service level.

SHORT CALL

A call that was terminated within the predefined Short Call threshold provisioned for the enterprise before being distributed to a destination site. See also Short Call threshold. Contrast with abandoned call.

SHORT CALL THRESHOLD

The time interval, provisioned for the enterprise, that determines whether a call is considered short or abandoned. Calls that are terminated before being distributed to a destination site but within this time threshold are counted as short rather than abandoned. The default is 5 seconds. See also abandoned call, short call.

Site

A physical contact center location under the control of the enterprise. For example, an enterprise named Acme might have sites in Chicago, Manila, and Bangalore.

Skill

An area of agent expertise, such as language fluency or product expertise, that can be used in skills-based routing to determine which calls an agent can receive. See also skill profile, skills-based routing.

Skill Profile

A set of skills, each with an assigned value, that can be assigned to a team or an individual agent. If a skill profile is assigned to a team, each agent logged in to that team is associated with that skill profile unless the agent is assigned a specific skill profile. See also skill, skills-based routing.

Skills-Based Routing

An optional feature that matches the needs of callers with agents who have the skills to best meet those needs. When calls arrive at an entry point, they are classified into subsets that can be routed only to agents who possess a requisite set of skills, such as language fluency or product expertise. See also skill, skill profile.

Sudden Disconnect Threshold

The time interval, provisioned for the enterprise, that determines whether a call is considered handled or was terminated so quickly as to possibly indicate an issue with connectivity or agent behavior. A call that

is terminated after being distributed to a destination site, but within this time threshold, is considered to be a disconnected call.

Talk Time

The time interval during which the agent is talking to the caller. This does not include time the call is on hold.

Team

The logical entity responsible for handling calls to a given queue. An agent can be assigned to multiple teams for selection; however, an agent can log in to only one team at a time. See also queue.

Tenant

An enterprise that subscribes to the service.

Terminated Call

A call that ends generally either because the caller or agent has hung up the connection.

Ticker

The scrolling text area at the top of the real-time pages. The ticker can be customized to display the key performance indicators that are most important to the enterprise's operations.

User

A person who accesses the service, typically a contact center manager, telecom manager, customer care executive, or other representative of the enterprise.

UTC

Coordinated Universal Time. Also known as Universal Time Coordinate. The standard time common throughout world, UTC is essentially the same as Greenwich Mean Time.

Virtual Team

A holding place for customer and outdial calls. There are six types of virtual teams—entry points, queues, outdial entry points, outdial queues, cross-ACD entry points, and proxy queues. See also entry point, queue, cross-ACD entry point, proxy queue.

Work Type

A value assigned to idle or wrap-up codes and used to group the codes in auxiliary reports. See also idle code, wrap-up code.

Wrap-Up Code

A value that an agent selects while using the Agent Desktop to indicate information about the disposition of each call after it ends—for example, Sale, Transferred, Case Completed. See also Agent Desktop.

Wrap-Up State

An agent state indicating that a call has ended, but the agent is not ready for the next call, typically because the agent is entering a wrap-up code or performing other after-call tasks

CUSTOMER SUPPORT

A team of expert support professionals are here to assist with technical issues, questions related to billing, feature usage, and service upgrades, as well as any other general inquiries you may have. Simply contact us and a representative will help you with your request.

In order to provide optimal support, we recommend that the account owner (or an Authorized Contact) submit a ticket or contact us via our toll-free support number regarding any critical or timely issues that may require troubleshooting. And always keep your account number handy to help us better assist you when you need us.

SUPPORT BY PHONE: 1-888-538-3960

Live phone support is available 24/7 for emergency assistance.

ONLINE SUPPORT: www.momentumtelecom.com/support

DOCUMENTATION: www.momentumtelecom.com/mu/training-library

Momentum University (MU) is an online knowledge base of training and support content on the Momentum Telecom website. This library is easy to use and offers the latest information about Momentum's best-in-class cloud services and features. MU includes product guides, user guides, FAQs, videos, and quick reference tools to help you do what you do.

ADDITIONAL TRAINING:

LIVE instructor-led training courses (web-based or in-person) for the ContactOne Management Portal and its modules are available upon request. Simply contact your Provider Account Manager or Customer Support to find out about the current course offerings and related pricing (if any) that may apply, and to request a session for your team.

