



Contact Center Anywhere Workgroup Administration Manager User's Guide for Account Creation

DHSCCA Systems Team

This document explains how to create agent, and supervisor accounts. It includes the following topics:

- About User Types
- Creating User Accounts
- Finding an Agent
 - Example Search 1: Display all Agents, but no Supervisors or Administrators
 - Example Search 2: List everyone whose last name begins with R
- Quick view sheet for creating Agent accounts

About User Types

You can use Administration Manager (AM) to create accounts for three main types of users:

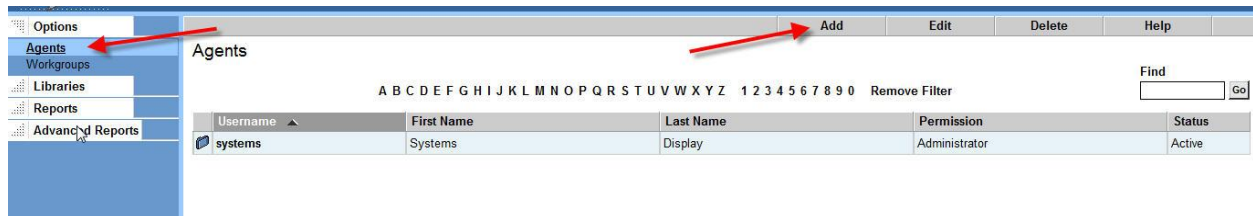
- 1** Agents, who use the Interaction Manager (IM) program to handle interactions entering the call center.
- 2** Supervisors, who monitor agent activities using the Supervision Manager (SM) program, but can also log into the IM and handle interactions.
- 3** Administrators, who can log into IM and SM, but mainly use the AM program to create and configure companies and accounts.

NOTE: Workgroup Administrator account creation is controlled by the CCA Systems Team. Requests for accounts must be sent to VEDSCCASystems@Wisconsin.gov

CAUTION: Do not change the values of any fields not identified in this document.

Creating User Accounts

1 In AM, from the Navigation Pane (under Options), click Agent Profiles tab and then Add.



2 Using the information in the in table 1, complete the Agent Profile fields indicated

The screenshot shows the 'Agents >> New Item' form. The left navigation pane has 'Options' selected, and the 'Agents' tab is active. The form has tabs for 'Profile', 'Controls and Restrictions', 'Regional Settings', 'Email', 'Phone', 'Skills', 'Follow Me', 'Applet Console Configuration', and 'Departure Reason'. The 'Profile' tab is active. The form contains the following fields:

- First Name: John
- Last Name: Smith
- Department: M1.MIES
- Date Hired: 09/01/2011
- Username: jsmith
- Access permission level: ☒ Agent, ☐ Supervisor, ☐ Guest Supervisor
- Account: ☒ Active, ☐ Inactive
- Password: [empty]
- Confirm Password: [empty]
- Address: Teutonia
- City: Milwaukee
- Country: United States
- State/Region: [empty]
- Postal/Zip Code: [empty]
- Country: 1
- Home Phone: [empty]

At the bottom right, there are buttons for 'OK', 'Cancel', and 'Apply'.

Table 1. Agent Profile Fields and Descriptions

Field	Description
First Name	Type the agent's first name.
Last Name	Type the agent's last name.
Department	Select the Consortium that the agent works for.
Username	Type the agent's WAMS account. NOTE: Only use lowercase letters
Address	Type the County office of the agents. NOTE: MILES agents type the building location (Example: Teutonia or Coggs)
City	Type Madison for Consortium agents or Milwaukee for MILES agents NOTE: City must be spelled correctly with only the first letter capitalized.
Access Permission Level	Select Agent, Guest Supervisor or Supervisor

3 Refer to Table 2 to understand the capabilities of the different user types.

Table 2. User Roles and Capabilities

Field	Description
Agent	Login to IM. Accept interactions. Create Contacts. Transfer customers and participate in conferences.
Supervisors	Login to IM and SM. Access all agent features. Supervise agents (Listen, Coach, Join, Hang up, Logout, Broadcast, Chat, Record). Set alarms. Monitor agent statistics, workgroups, projects, and interactions. Review recordings. Run any reports that administrators created. Control and monitor predictive dialing. NOTE: You can create supervisors with either full or limited permissions.
Guest Supervisors	Login to SM. Set alarms. Listen to and monitor the status of agents that are assigned to them.
Workgroup Administrators	Login to AM, SM, and IM. After the CCA Systems team gives them access, they can: Modify workgroup assignments Set business events. Create agents, supervisors, and guest supervisors. Create reports.
Access Permission Level	Select Agent or Supervisor

4 Click Controls and Restrictions tab. Using the information in the table 3, complete the Agent Profile fields indicated

The screenshot shows the 'Agents >> New Item' configuration window, specifically the 'Controls and Restrictions' tab. The left sidebar contains a tree view with 'Options' selected. The main window has a tabbed interface with 'Agents to Supervise', 'Supervisors', 'Workgroups', 'Unified Messaging', 'Profile', 'Controls and Restrictions' (active), 'Regional Settings', 'Email', 'Phone', 'Skills', 'Follow Me', 'Applet Console Configuration', and 'Departure Reason'. The 'Controls and Restrictions' tab contains the following settings:

- ☒ Allow call recording in Interaction Manager
- ☒ Enable automatic recording of Agent
 - Percentage of calls to record: 25% (dropdown)
 - Set the number of rings the system will wait for an Agent to answer: 3 (text box)
 - ☐ Disable loading of VNC/Remote Monitoring
- Set the maximum number of Interactions the Agent will handle simultaneously
 - Chat: 1 (text box)
 - Offline (Fax and Email): 1 (text box)
- Inactive Session Timeout
 - ☐ Disable Session Timeout
 - ☒ Enable Session Timeout : 9 Hours
- Allow Outbound Calls: Use Company's Default (dropdown)
 - ☒ Enable international long distance dialing
 - ☐ Restrict long distance dialing to this country code: 1 (dropdown)
- ☒ Project Billing (dropdown)
- ☒ Allow wrap-up time after call
 - Wrap-up time: 20 (text box) (secs.)
- ☒ Require Outcome
 - ☒ Display this agent in the Company Directory
 - ☐ When the agent is logged out, send the call directly to voicemail
- Status of the agent at login: Busy (dropdown)
- The agent will listen to the ACD Voicemail by
 - ☒ EMail
 - ☐ Phone
 - ☐ Allow Phone Login

At the bottom right are buttons for 'OK', 'Cancel', and 'Apply'.

Table 3. Agent Controls and Restrictions Fields and Descriptions

Field	Description
Allow call recording In Interaction Manager	Check this box so the agent can record conversations with callers when logged into the IM.
Enable automatic recording of Agent	Check this box to record this agent at random times for quality monitoring.
Percentage of calls to Record	Select 25% percentage of interactions to record automatically when the agent is logged into the IM.
Set the number of rings the system will wait for an Agent to answer	Enter the 3 for the number of times to ring the agent's extension before setting the agent's status to <i>No Answer</i> and placing the workgroup call back into the queue. NOTE: The agent and customer may not hear the exact number of rings you specify. CCA plays ring.wav for $((n * 4) + 6)$ seconds, where <i>n</i> is the value you specify.
Inactive Session Timeout	Set the Inactive Session Timeout to automatically log out an agent or supervisor after a period of 10 Hours
Project Billing	Select the project that to use as the default billing project for this agent in IM.
Allow wrap up time after calls	Check this box so that the Agent has time to wrap-up a concluded phone interaction (ACD call, callback, and Web callback). Then, enter the wrap-up time (in seconds) in the next box. After the wrap-up time expires, CCA changes the agent's status to <i>Available</i> and routes the next interaction. NOTE: Wrap-up does not apply to direct inbound or direct outbound calls. As soon as an agent disconnects from a direct inbound or outbound call, their status immediately changes to <i>Available</i> .
Wrap-up time	Type 20 for the number of seconds the agent is given to wrap-up a concluded phone interaction.
Require outcome	Check this box so that the agent can access the Outcome Library at the conclusion of interactions. Requiring agents to record an outcome after each interaction allows you to track the results of interactions.
Status of the agent at Login	From drop-down list, select the Busy for the agent's status when first logging into the system. (Select from Available, Busy, Last Call, or On Break.) This setting only affects the agent's state when first logging into IM. Afterwards both the agent and the system change the agent's state.
The agent will listen to the ACD Voicemail by:	Select Email for agents to use their email to access an ACD voicemail. <ul style="list-style-type: none"> By selecting the Email button, the agent can access their ACD voicemails by: <ul style="list-style-type: none"> Accepting the voicemail as an interaction. The system will start the agent's email client. The voicemail will appear as an email attachment. The agent can open the sound file attachment and listen.

5 Click Email tab. Using the information in the table 4, complete the Agent Profile fields indicated

The screenshot shows the 'Agents >> New Item' configuration window. The 'Email' tab is selected. The 'Agent Email address' field contains 'john.smith@wisconsin.gov'. The 'Select SMTP Group (Outgoing mail)' dropdown is set to 'DOA SMTP'. The 'Defined POP3 Server (Incoming Mail)' section has empty fields for Host, User, and Password, and an unchecked 'Enable SSL' checkbox. The left sidebar shows 'Options', 'Agents', 'Workgroups', 'Libraries', 'Reports', and 'Advanced Reports'. The top navigation bar includes 'Agents to Supervise', 'Supervisors', 'Workgroups', 'Unified Messaging', 'Profile', 'Controls and Restrictions', 'Regional Settings', 'Email', 'Phone', 'Skills', 'Follow Me', 'Applet Console Configuration', and 'Departure Reason'.

6 Using the information in table 4, supply the agent's email information.

Table 4. Agent Email Fields and Descriptions

Field	Description
Agent Email Address	Type the full email address for CCA to use when routing email interactions to the agent.
Select SMTP Group	Choose DAO SMTP for CCA to use when handling mail sent by this agent.

7 Click Phone tab. Using the information in the table 5, complete the Agent Profile fields indicated.

The screenshot shows the 'Agents >> New Item' configuration window with the 'Phone' tab selected. The 'Agent Extension Number' is 10003. Under 'Select type of phone', the 'Outside Phone (Remote Extension)' option is selected, indicated by a red arrow. The 'Country' is set to 1 and the 'Phone' number is 4145354808. Other options like 'SIP', 'No Phone (Voicemail only)', 'Work Off Hook (Disable Dial Tone)', and 'Automatic Call Acceptance' are unselected. 'Direct Inward Dialing' is set to 'None'. The 'Play Welcome Prompt' checkbox is also unselected.

8 Using the information in table 5, supply a phone type for the agent.

Table 5. Agent Extension Types and Descriptions

Field	Description
Agent Extension Number	Do not change NOTE: CCA will assign an agent extension for each agent.
Outside phone	Type the direct (DID) phone number of the agent.

9 Click Applet Console Configuration tab.

Options Agents Workgroups Libraries Reports Advanced Reports

Agents >> New Item

Agents to Supervise Supervisors Workgroups Unified Messaging

Profile Controls and Restrictions Regional Settings Email Phone Skills Follow Me **Applet Console Configuration** Departure Reason

☐ Close Connection

☐ Disable Agent's Cache

Debug Level OFF

☐ Enable Telnet

Time to Login (in Minutes) 2

☐ Enable Log File

Log File Full Path

Ping Delay (in Seconds) 1

☐ Disable Wrap Up Timer

☐ Disable Elapsed Timer

☐ Disable Phone State Timer

URL Time Out (in Seconds) 60

☐ Enable hot keys

Select JRE Download Version jre-1_5_0_10

OK Cancel Apply

10 Using the information in table 6, complete the Applet Console Configuration screen.

Table 6. Applet Console Configuration Fields and Descriptions

Field	Description
Enable hot keys	Remove check mark NOTE: When checked, agents can use shortcuts consisting of a combination of keys.

11 Click Supervisors tab. The Agents screen: Supervisors tab opens.

<input checked="" type="checkbox"/>	Username ▲	First Name	Last Name	Department
<input checked="" type="checkbox"/>	jmalcheski	Joan	Malcheski	Systems
<input type="checkbox"/>	systems	Systems	Display	

If you are configuring an agent, use this screen to assign them to a supervisor. You can also assign agents to a supervisor by configuring a supervisor and using the *Agents to Supervise* tab.

CAUTION: You cannot assign more than 100 agents to the same supervisor.

The *Supervisors* tab will only list a supervisor if:

- ❑ The supervisor has less than 100 agents, or
- ❑ The supervisor has more than 100 agents but is supervising the agent you are editing.

a Click the check box next to the name of each supervisor whom is to supervise this agent.

12 Click Workgroups tabs. The Agents screen: Workgroups tab opens.

Agents >> New Item

Agents to Supervise | Supervisors | **Workgroups** | Unified Messaging

Profile | Controls and Restrictions | Regional Settings | Email | Phone | Skills | Follow Me | Applet Console Configuration | Departure Reason

All Clear

<input checked="" type="checkbox"/>	Name ▲	Description
<input type="checkbox"/>	C1.General	Non-specific program workgroup for C1
<input checked="" type="checkbox"/>	M1.Advanced	MiES Advanced Calls
<input checked="" type="checkbox"/>	M1.Fair.Hearing	MiES Fair Hearing calls
<input type="checkbox"/>	M1.Fraud	MiES Fraud Calls
<input type="checkbox"/>	M1.General	MiES General Calls
<input type="checkbox"/>	M1.Hmong	MiES Hmong Calls
<input type="checkbox"/>	M1.MECA	MECA Calls
<input type="checkbox"/>	M1.Spanish	MiES Spanish Calls
<input type="checkbox"/>	M1.Translation	MiES Calls that require Translation services

OK Cancel Apply

a Click the check box next to each workgroup to which this users is to be a member.

13 Click Agents to Supervise tab. The Agents screen: Agents to Supervise screen opens.

Agents >> New Item

Agents to Supervise | Supervisors | Workgroups | Unified Messaging

Profile | Controls and Restrictions | Regional Settings | Email | Phone | Skills | Follow Me | Applet Console Configuration | Departure Reason

<input checked="" type="checkbox"/>	Username ▲	First Name	Last Name	Department
<input checked="" type="checkbox"/>	jmalcheski	Joan	Malcheski	Systems
<input type="checkbox"/>	systems	Systems	Display	

OK Cancel Apply

If you are configuring a supervisor or an administrator, use this tab to assign agents for them to supervise. When a supervisor has an assigned agent, the supervisor can interact with that agent using the SM program (view, monitor, get agent statistics, and so on).

NOTE: Supervisors can only interact with agents that are assigned to them.

CAUTION: You cannot assign more than 100 agents to the same supervisor.

Finding an Agent

If your Company employs a large number of agents, you can use the Agent Search tool to quickly locate an agent from a large list of agents.

- 1 In AM, from the Navigation Pane (under Options), click Agents.
- 2 Select a column to search ([Figure 113](#)).
 - a To view a list of all accounts, make sure that there is no text in the Find text box and then click the Go button.
 - b To sort the list of agents, click on any column header.
 - c To search on a column, select a column and click on a letter or number (A-Z or 1-0). You can also select a column, enter a string or substring in the Find text box, and then click the Go button.
 - d To search using a wildcard, select a column and then type % (percent sign) as a wildcard character and then type a substring and wildcard in the Find text box.

For example: To find Roger, enter Rog%, %og%, and %er.

NOTE: You cannot use wildcards when you search on the Permission column.

Example Search 1: Display all Agents, but no Supervisors or Administrators

- 1 Select the Permission column.
- 2 In the Find text box, enter "agent" (without the quotes).
- 3 Click the Go button.
- 4 Only Agents will be listed.

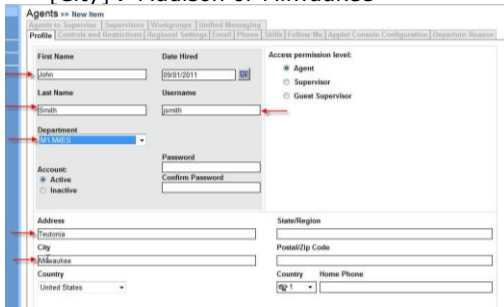
Example Search 2: List everyone whose last name begins with R

- 1 Select the Last Name column.
- 2 In the letter bar, click R. All agents, supervisors, and administrators whose last name begins with the letter R appear.

Quick view sheet for creating Agent accounts

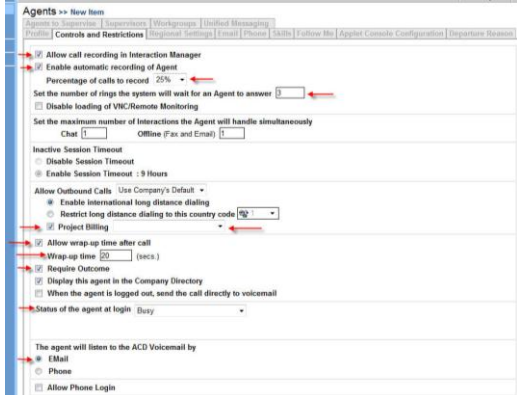
1 Profile Tab

[First Name]
[Last Name]
[Username] → WAMS ID
[Department] → Assigned Consortium
[Address] → County Office where the agents sits
[City] → Madison or Milwaukee



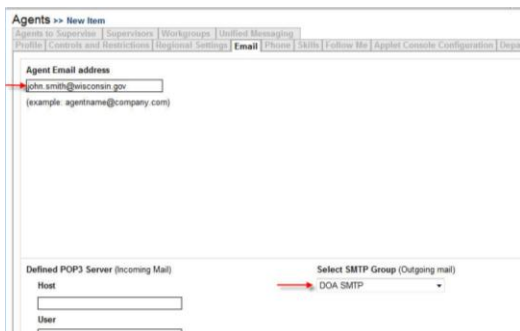
2 Controls and Restrictions tab

[Allow call recording ...] → Enable
[Enable automatic recording...] → Enable
[Percent of calls to record] → 25%
[Set number of rings...] → 3
[Project Billing] → Enable
[Project Billing](Drop down) → Assigned Consortium
[Allow Wrap-up time after call] → Enable
[Wrap-up time] → 20
[Require Outcome] → Enable
[Status of the agent at login] → Busy
[The agent will listen to ...] → Email



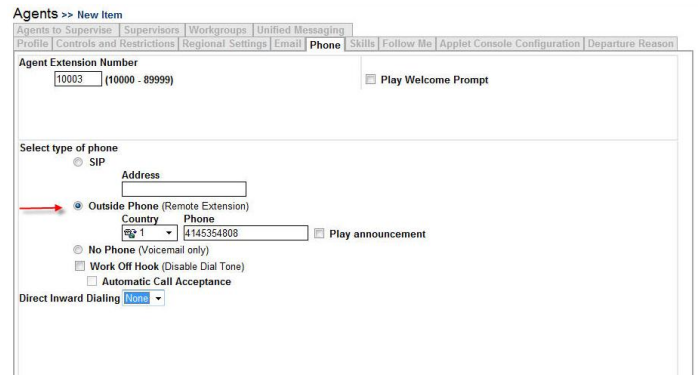
3 Email tab

[Agent Email address]
[Select SMTP Group] → DOA SMTP



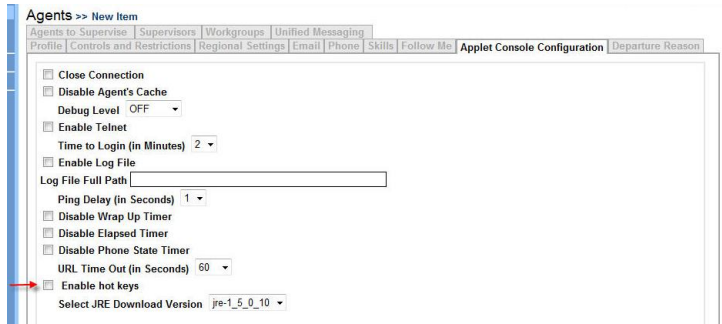
4 Phone tab

[Outside Phone] → Enable
[Phone]



5 Applet Console Configuration tab

[Enable hot keys] → Disable



6 Supervisors tab

[Assign agent to Supervisors]



7 Workgroups tab

[Assign agent to Workgroups]

