# 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

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.

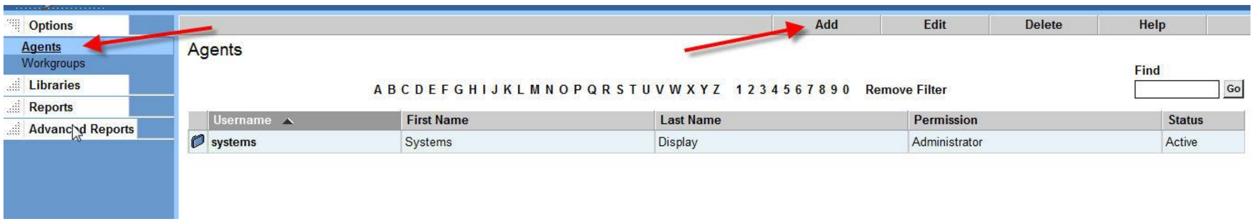
3 Administrators, who can log into IM and SM, but mainly use the AM program to create and configure companies and accounts.

**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

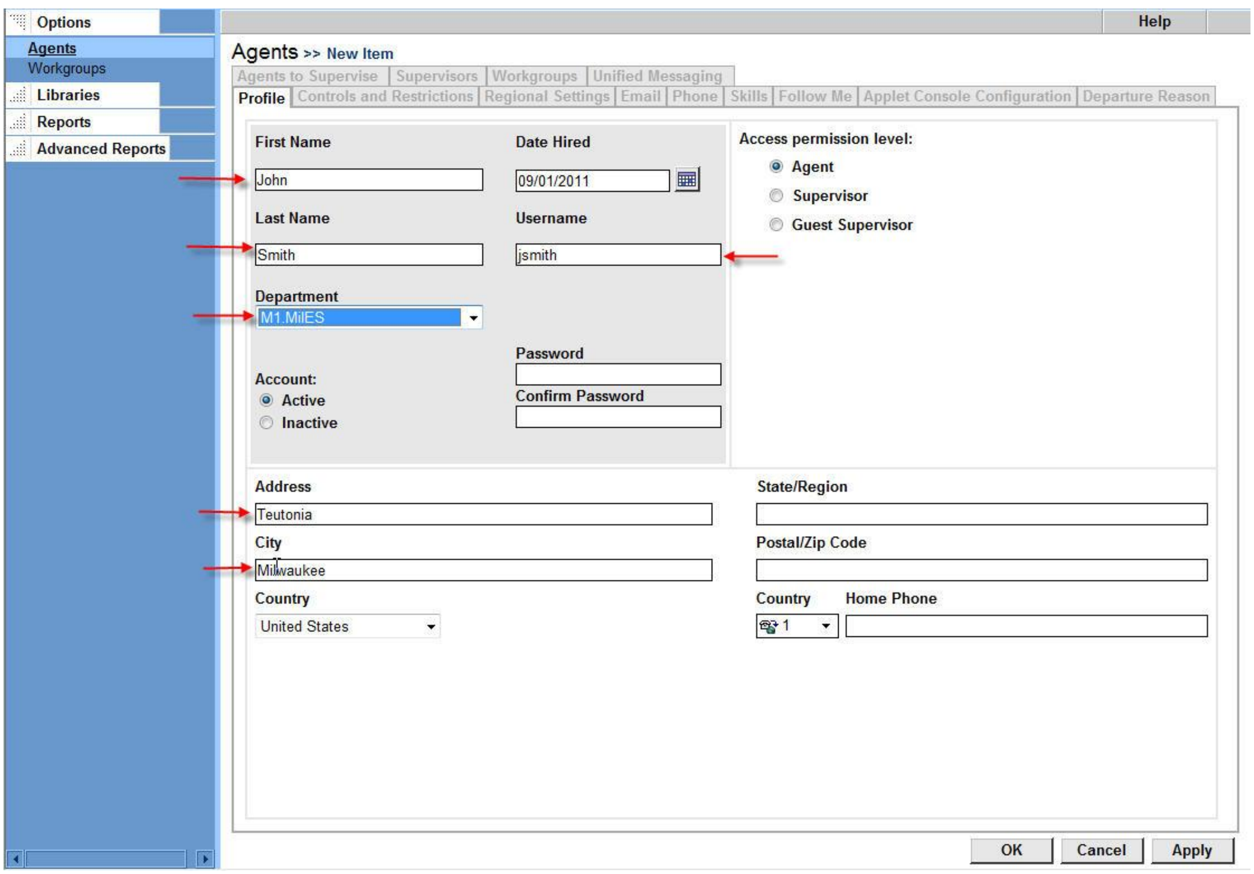



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Table 1. Agent Profile Fields and Descriptions

| 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.<br>NOTE: Only use lowercase letters |
| Address | Type the County office of the agents.<br>NOTE: MilES agents type the building location (Example: Teutonia or Coggs) |
| City | Type **Madison** for Consortium agents or **Milwaukee** for MilES agents<br>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.<br>Accept interactions.<br>Create Contacts.<br>Transfer customers and participate in conferences. |
| Supervisors | Login to IM and SM.<br>Access all agent features.<br>Supervise agents (Listen, Coach, Join, Hang up, Logout, Broadcast, Chat, Record).<br>Set alarms.<br>Monitor agent statistics, workgroups, projects, and interactions.<br>Review recordings.<br>Run any reports that administrators created.<br>Control and monitor predictive dialing.<br>**NOTE:** You can create supervisors with either *full* or *limited* permissions. |
| Guest Supervisors | Login to SM.<br>Set alarms.<br>Listen to and monitor the status of agents that are assigned to them. |
| Workgroup Administrators | Login to AM, SM, and IM.<br>After the CCA Systems team gives them access, they can:<br>Modify workgroup assignments<br>Set business events.<br>Create agents, supervisors, and guest supervisors.<br>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

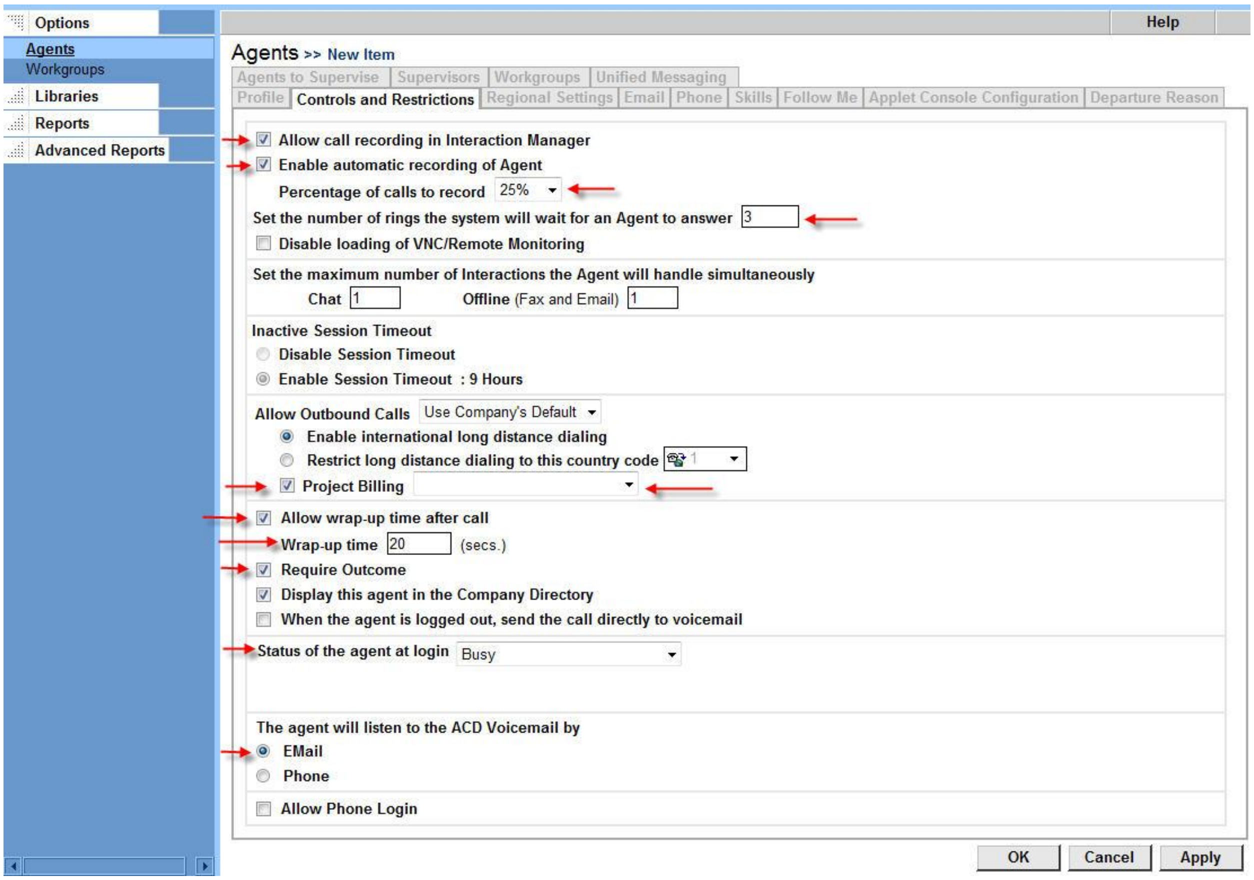
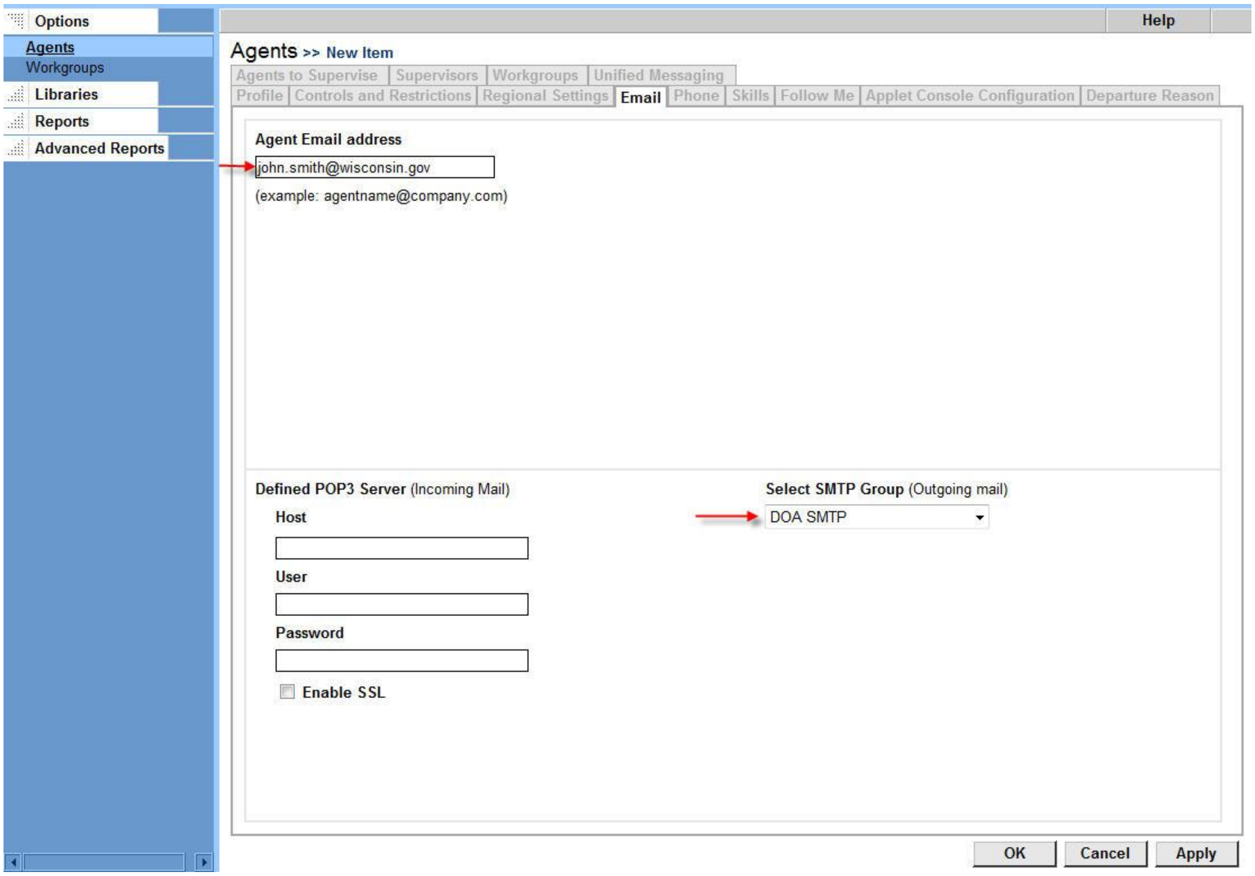


Table 3. Agent Controls and Restrictions Fields and Descriptions

| 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 *No Answer* and placing the workgroup call back into the queue.<br>**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 $n$ 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 *Available* and routes the next interaction.<br>**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 *Available*. |
| 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<br>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<br>ACD Voicemail by: | Select Email for agents to use their email to access an ACD voicemail.<br>▪ By selecting the **Email** button, the agent can access their ACD voicemails by:<br>▪ Accepting the voicemail as an interaction.<br>▪ The system will start the agent's email client. The voicemail will appear as an email attachment.<br>▪ 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

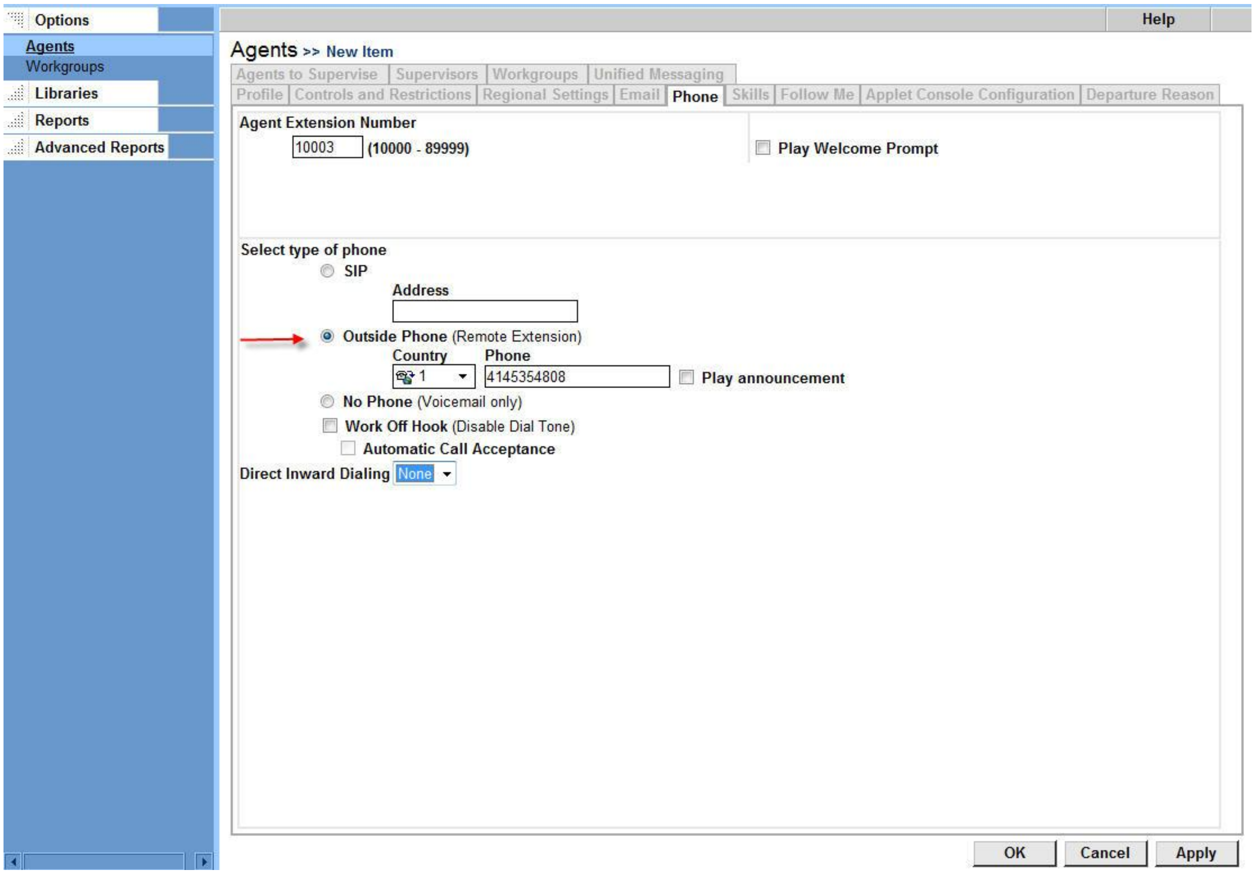



6 Using the information in table 4, supply the agent's email information.

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.

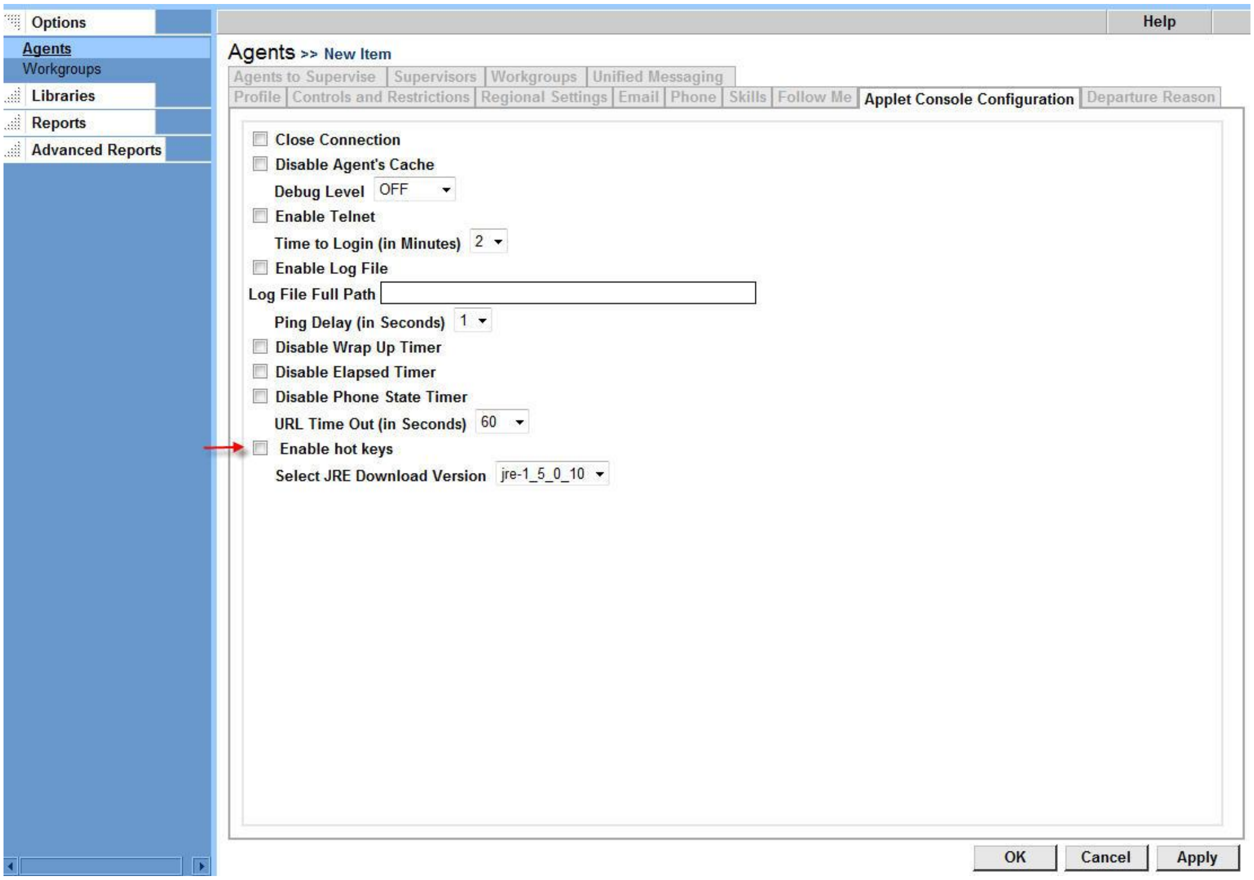



**8** Using the information in table 5, supply a phone type for the agent.

Table 5. Agent Extension Types and Descriptions

| Field | Description |
|---|---|
| Agent Extension Number | Do not change<br>**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.

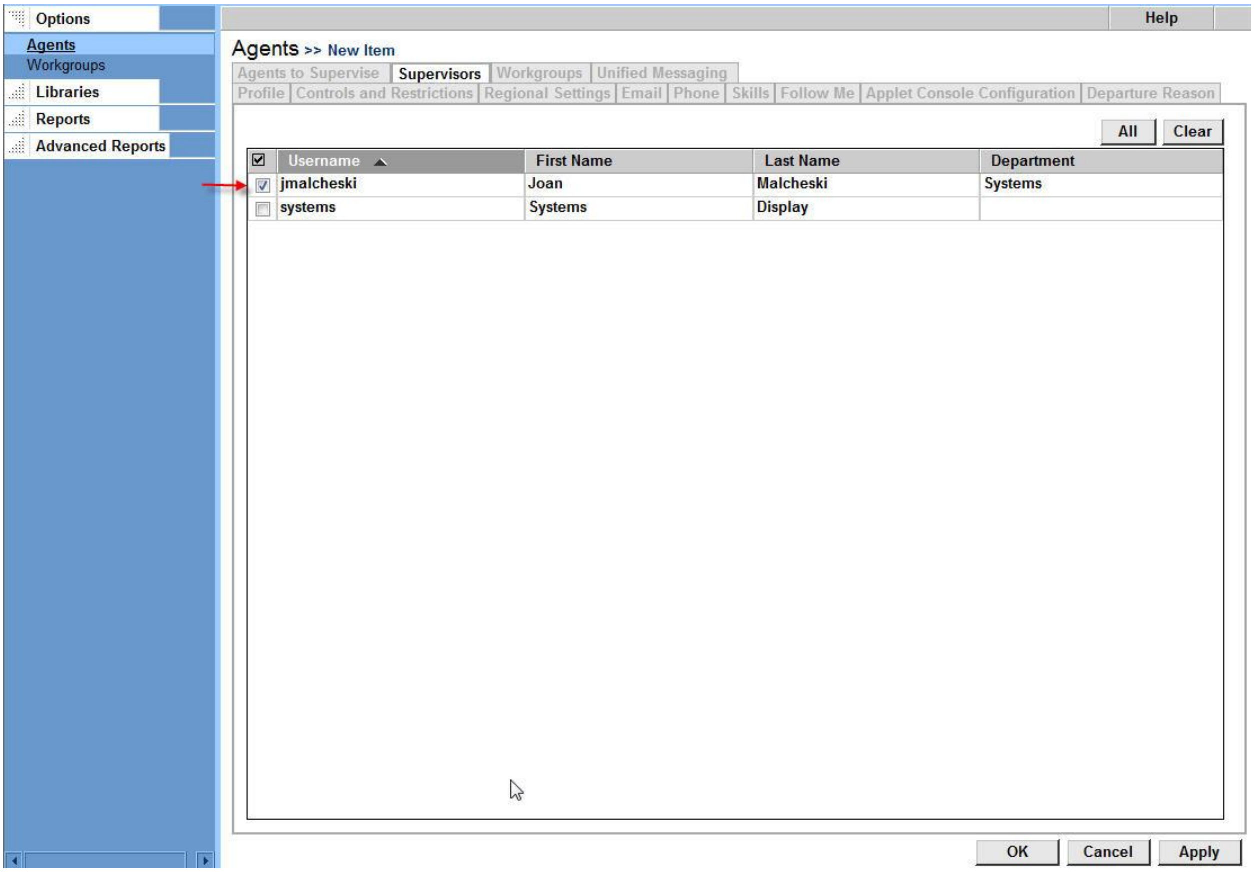



10 Using the information in table 6, complete the Applet Console Configuration screen.

Table 6. Applet Console Configuration Fields and Descriptions

| Field | Description |
|---|---|
| Enable hot keys | Remove check mark<br>**NOTE:** When checked, agents can use shortcuts consisting of a combination of keys. |

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




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.

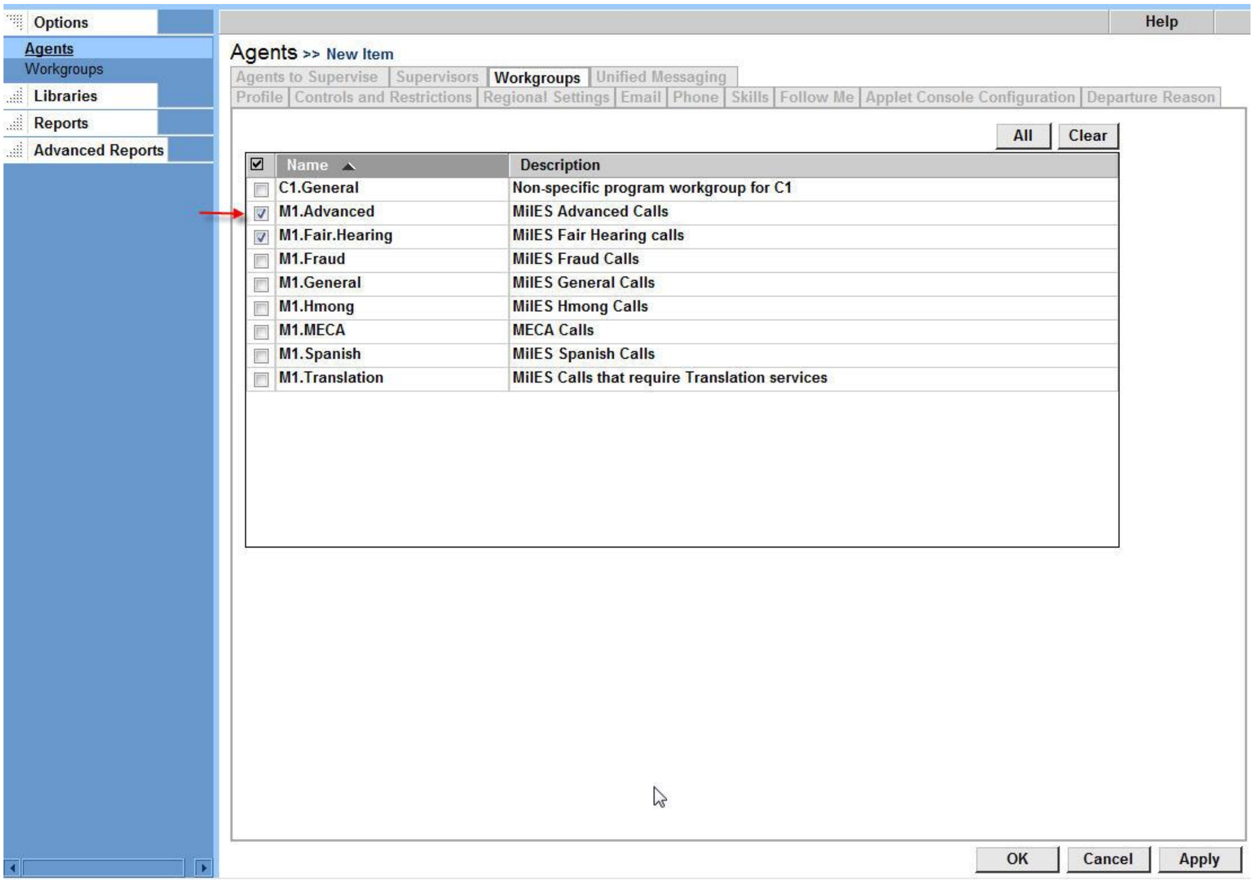
**CAUTION:** You cannot assign more than 100 agents to the same supervisor.

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.

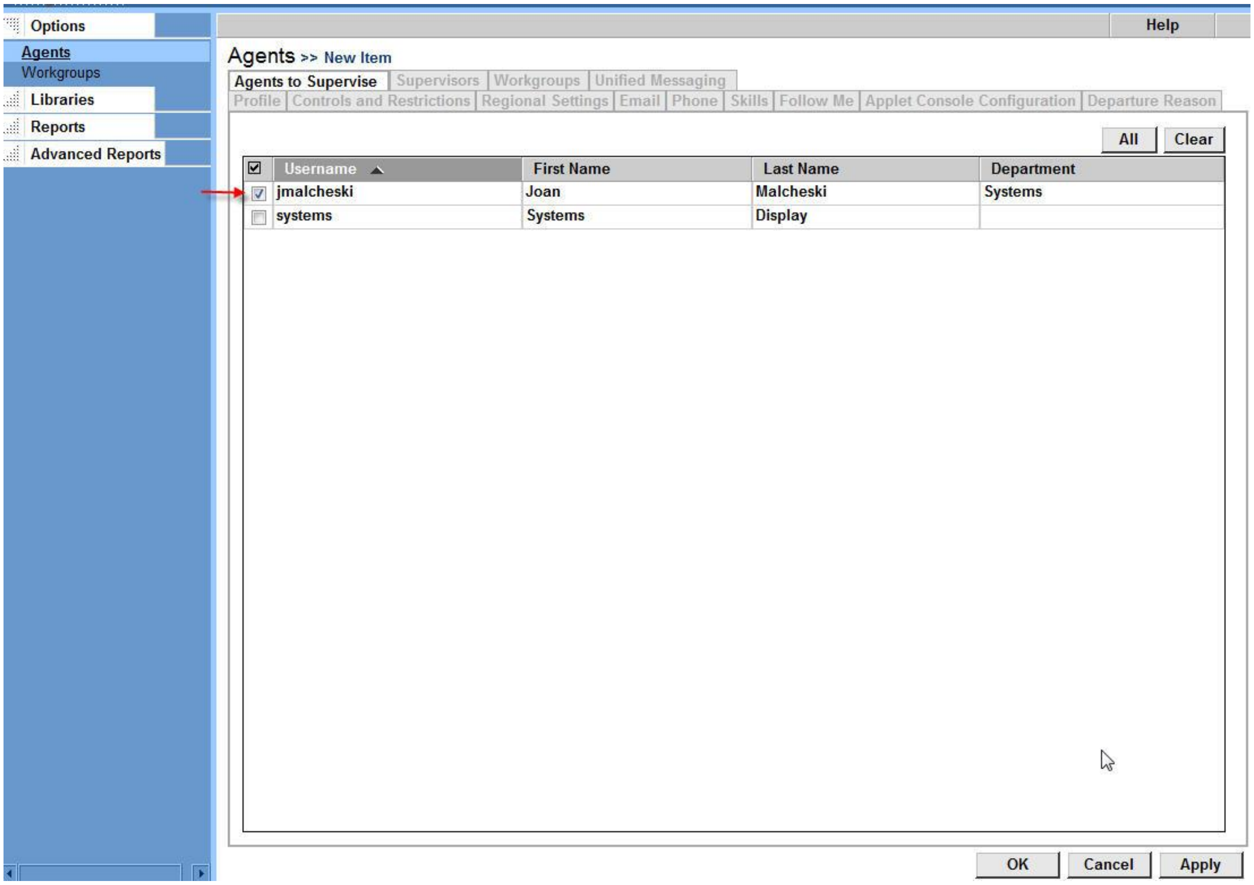
a Click the check box next to the name of each supervisor whom is to supervise this agent.

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




**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.




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

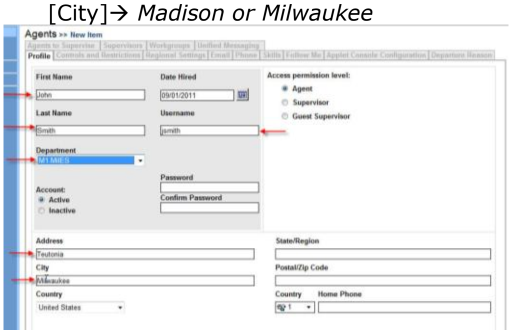
**1** Select the Last Name column.

**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

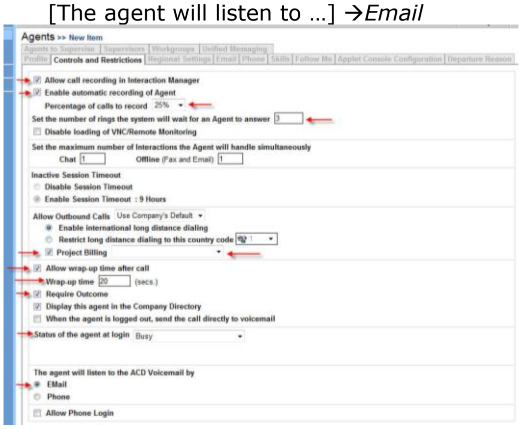
## 1 Profile Tab

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



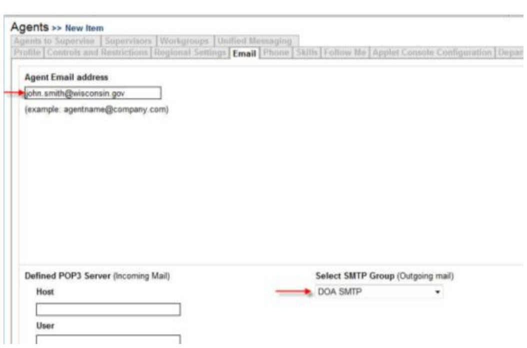

## 2 Controls and Restrictions tab

[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*



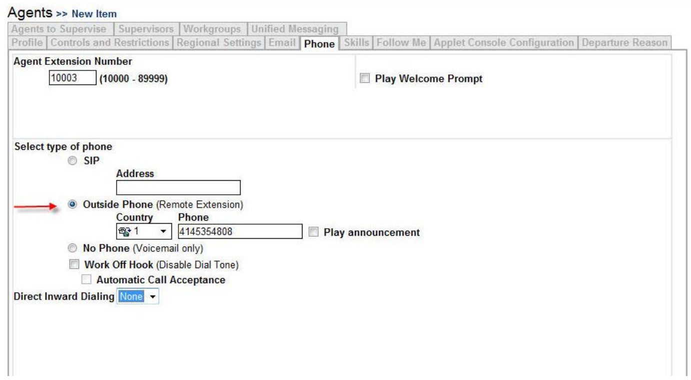

## 3 Email tab

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



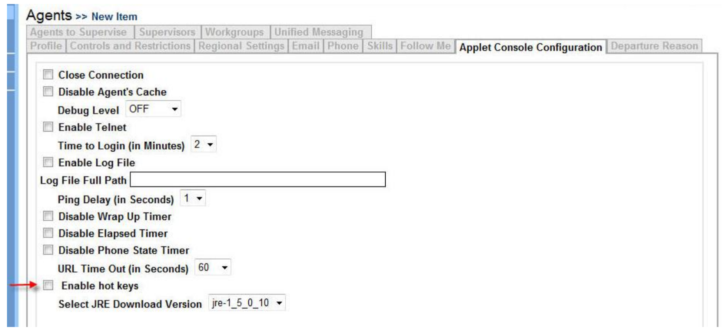

## 4 Phone tab

[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]