Contact Center
Administrator Training

Agenda

- Dashboard Training (introduction)
    - concepts/terminology
    - feature review
- Dashboard Training (concepts & hands-on)
    - … A Walk Thru Your Production Setup…
        - Provisioning
        - Sites and Teams
        - Entry Points and Queues
        - Routing Strategy
- Skills Based Routing
- Reporting
- Questions

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Dashboard – System Requirements

- Memory: 2 GB RAM, excluding operating system allocation. Note that some applications may require more memory.

- Operating System: Supported operating systems are listed below. Other client operating systems can be used at the customer's discretion. BroadSoft will only provide best effort support and will not work on product fixes on unsupported operating systems
  - Microsoft Windows: Windows 7, Windows 8 and Windows 10.
  - Mac: OSX (when supported browsers are used)

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Dashboard – Browser Requirements

Supported Web browsers:

- Internet Explorer 11.0 and above

- Chrome version 40 to 51

- Firefox version 44 to 45

Required browser settings:

- Browser cache cleared before starting the current release for the first time

- Cookies: Enabled

- Security level: Medium

- Pop-up blocker: Disabled

- JavaScript: Enabled

Adobe Flash Player

- Adobe Flash Player 21 or later.

- Download the latest version of flash from : https://get.adobe.com/flashplayer/

- Identify the version of flash installed by launching : http://www.adobe.com/software/flash/about/

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Service Overview

What is CC1?

- CC1 is a virtual ACD located in the network
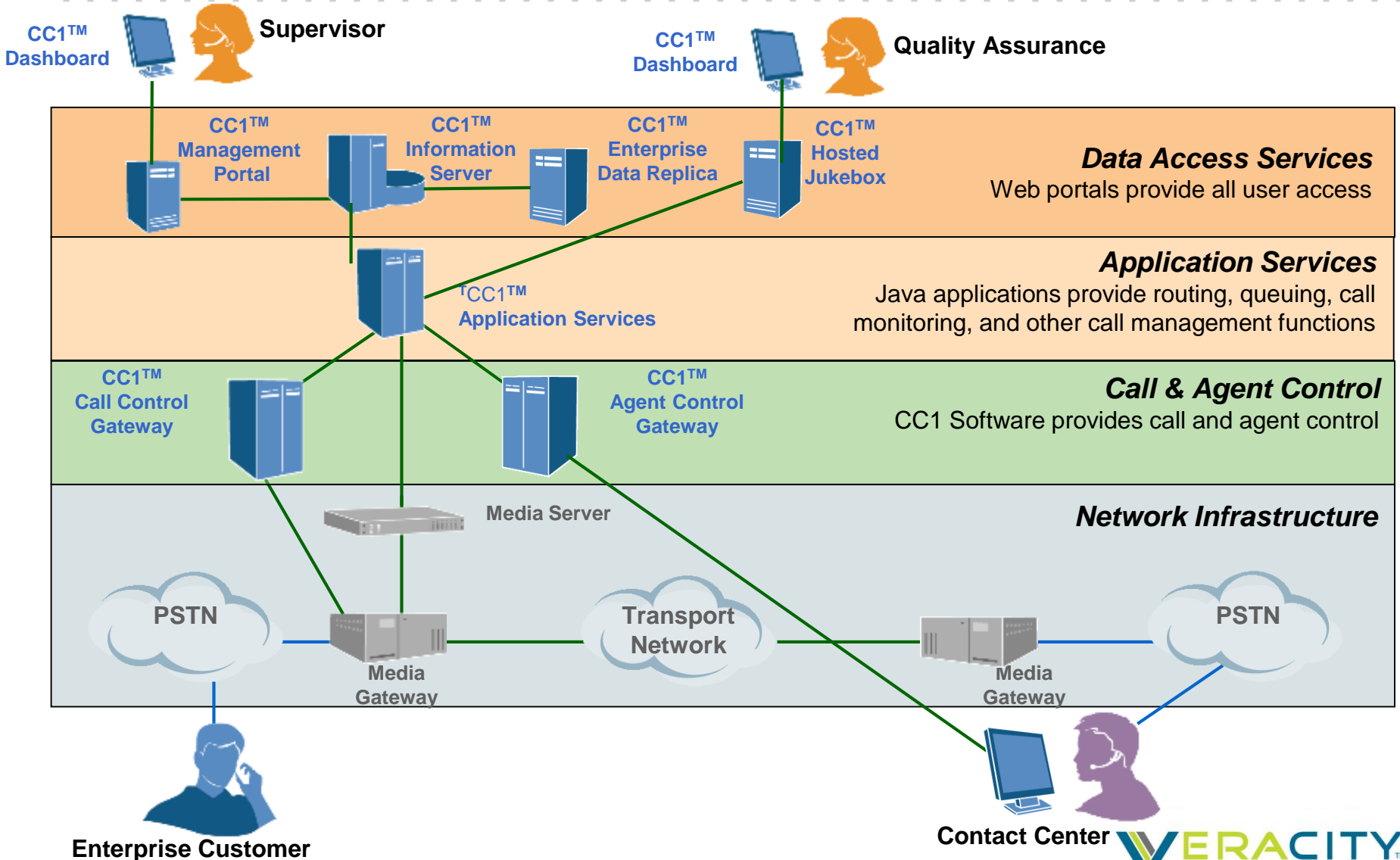
- CC1 provides "mid-point" call control
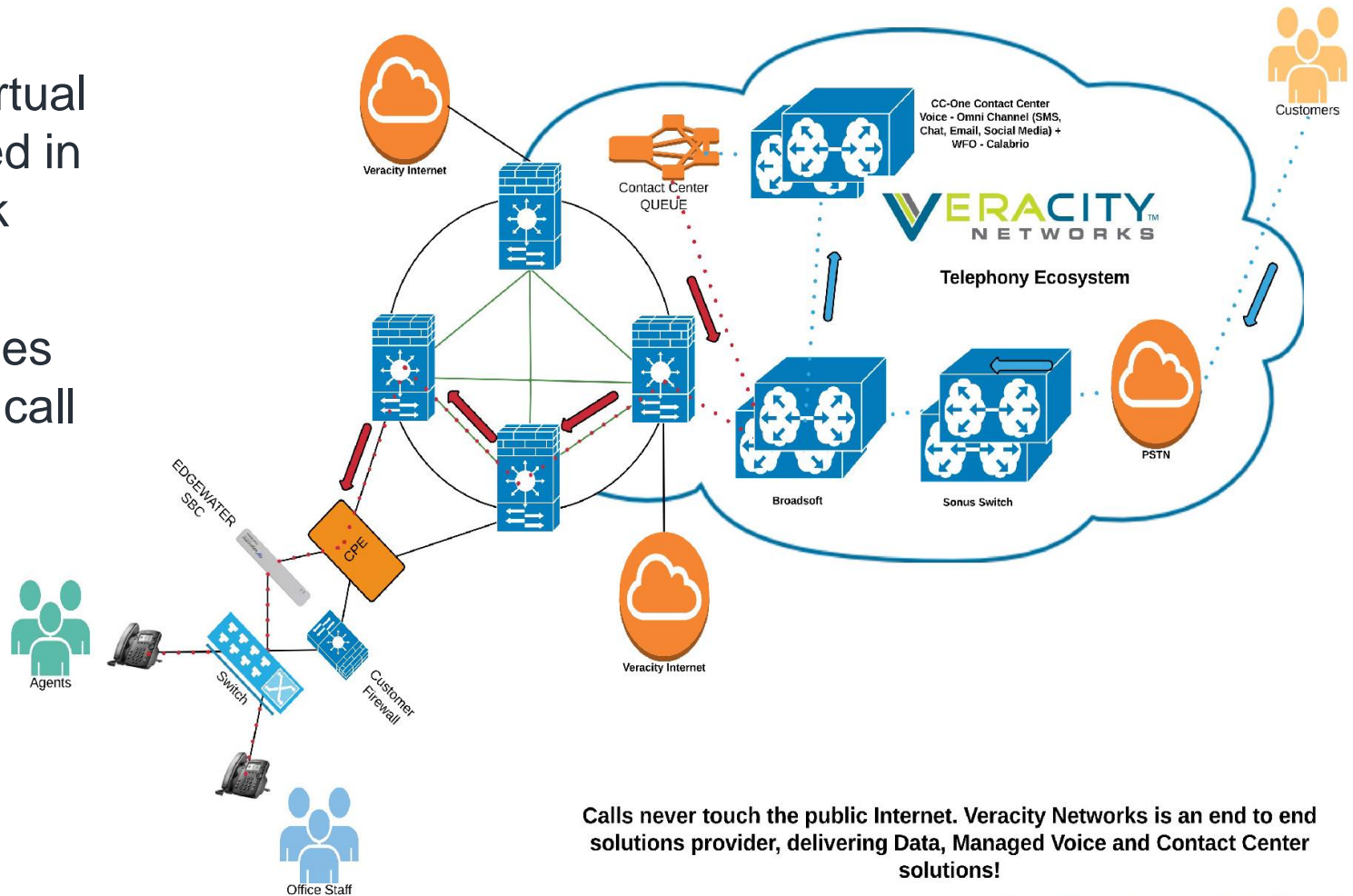
Calls never touch the public Internet. Veracity Networks is an end to end solutions provider, delivering Data, Managed Voice and Contact Center solutions!

What does CC1 do?

- For the caller
  - Auto-attendant and call queuing
  - Call routing based on menu prompts and selections
- For the agent
  - Call management (hold, consult, conference and transfer)
  - Make calls (out)
  - Agent state management (available, break, etc.)
  - Personal statistics
- For the system administrators
  - ACD administration
  - Access control rights
  - Agent provisioning
- For the management team (including QA)
  - Call Monitoring
  - Call Recording
  - Real-Time Reports
  - Historical Reports

What are the CC1 components?

CC1™ Dashboard — Supervisor
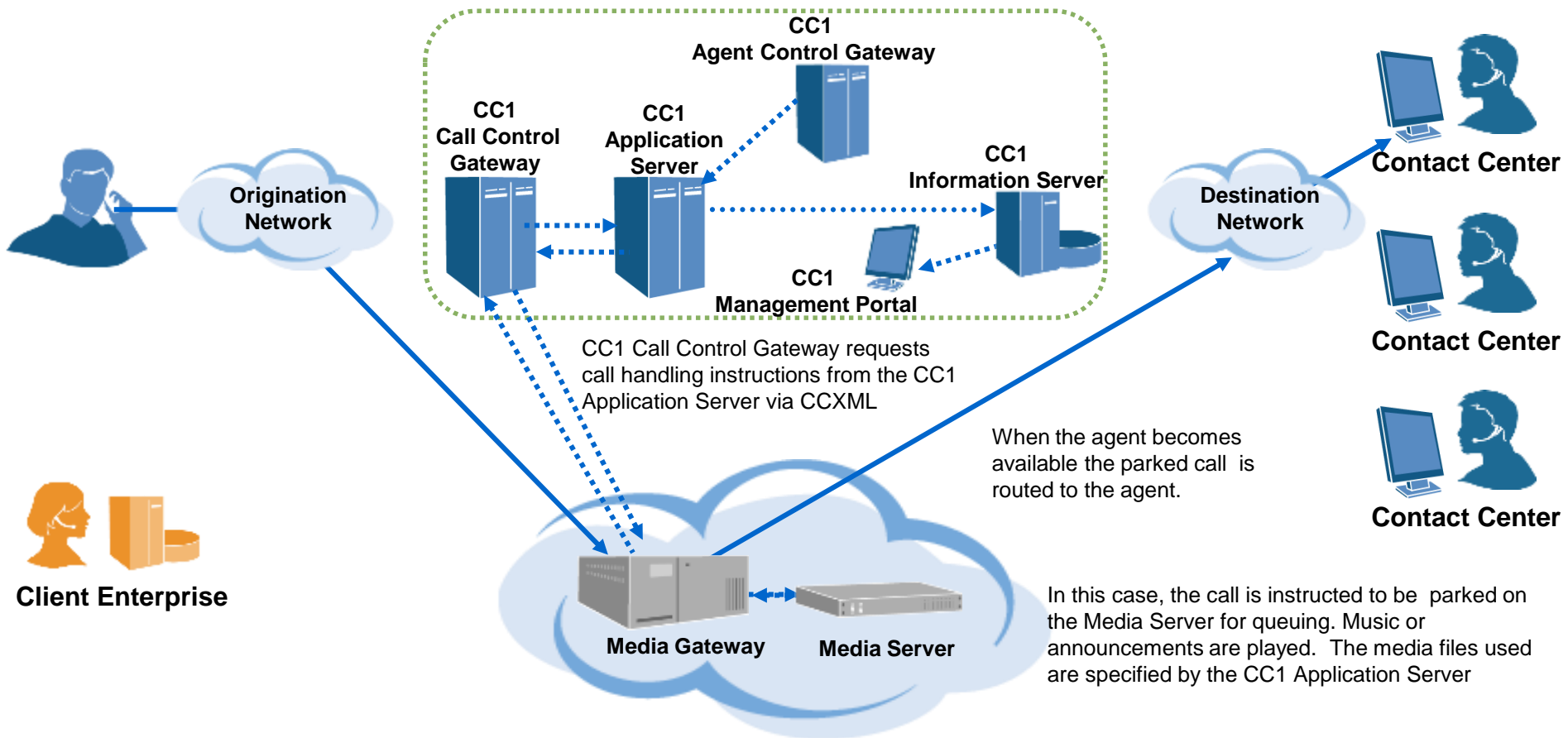
CC1™ Dashboard — Quality Assurance

Data Access Services
Web portals provide all user access

CC1™ Management Portal

CC1™ Information Server

CC1™ Enterprise Data Replica

CC1™ Hosted Jukebox

Application Services
Java applications provide routing, queuing, call monitoring, and other call management functions

CC1™ Application Services

Call & Agent Control
CC1 Software provides call and agent control

CC1™ Call Control Gateway

CC1™ Agent Control Gateway

Network Infrastructure

Media Server

PSTN

Media Gateway

Transport Network

Media Gateway

PSTN

Enterprise Customer

Contact Center

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What are the CC1 components?

- **Network Infrastructure**
  - Media gateways: provide connectivity to the public telephone network
  - Media servers : provide voice prompts, music in queue and music on hold
  - Network routers: provide connectivity to the internet and private networks
- **Call and Agent Control**
  - Agent control gateway: accepts agent applet connections and data exchange
  - Call control gateway: manages the flow of the call across the network elements (above)
- **Application Services**
  - CC1 applications that provide the ACD and call control functions and features for the management team (including QA)
- **Data Access Services**
  - CC1 management portal: provides access to the CC1 dashboard features
  - Information servers: contain hosted call center data
  - Jukebox: contains hosted call recordings
  - Data replica: contains call center data for a single customer

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Inbound Call Flow – Agents Available

1 – Agent logs into CC1 through a Java applet/Call Console and is available to take calls. (Agent states include: Ready, Not Ready, Available, Not Available)

CC1 Agent Control Gateway

2- Customer calls the contact center.

CC1 Call Control Gateway

CC1 Application Server

CC1 Information Server

Origination Network

Destination Network

Contact Center

CC1 Management Portal

3- Call lands on a media gateway in the network POP

5- CC1 Call Control Gateway requests call handling instructions from the CC1 Application Server via CCXML, and the Call Control Gateway instructs the Media Gateway where to route the call

Contact Center

4 - Media gateway signals CC1 Call Control Gateway via SIP that a call has arrived & needs handling instructions

Contact Center

Client Enterprise

6 - Management control and operation (e.g. routing, reporting and call monitoring) are accessed by the enterprise via a web browser

Media Gateway

Media Server

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Inbound Call Flow – No Agents Available

CC1 Agent Control Gateway

CC1 Call Control Gateway

CC1 Application Server

CC1 Information Server

CC1 Management Portal

Origination Network

Destination Network

Contact Center

Contact Center

Contact Center

Client Enterprise

Media Gateway

Media Server

CC1 Call Control Gateway requests call handling instructions from the CC1 Application Server via CCXML

When the agent becomes available the parked call is routed to the agent.

In this case, the call is instructed to be parked on the Media Server for queuing. Music or announcements are played. The media files used are specified by the CC1 Application Server

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Inbound Call Flow – Call Monitoring

CC1
Agent Control Gateway

CC1
Call Control
Gateway

CC1
Application
Server

CC1
Information Server

CC1
Management Portal

Origination
Network

Destination
Network

Contact Center

Contact Center

Contact Center

Enterprise supervisors have visibility and real-time control over call monitoring

Client Enterprise

Media Gateway

Media Server

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Introduction

Dashboard Training

CC1 Provisioning Framework

Call Routing Resources

Customer Calls

Control Scripts

Entry Point Strategies

ENTRY POINTS

Greeting

Wave Files

TO

MainMenu

Wave Files

INVLD

Queue Strategies

1

2

Queue A

Queue B

Wave Files

Call Handling Resources

Agent Profiles

SITE X

Team 1

Team 2

SITE Y

Team 3

Address Books

Skill Profiles

Agents

Agents

Agents

Agents

Agents

Agents

Agents

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Provisioning Framework Terminology

Entry Point. The initial landing place for customer calls on the CC1 system. One or more toll-free or direct 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.

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 agent team(s).

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

Team. The logical grouping of agents. Teams handle calls for one or more queues. Agents can belong to more than one team, but agent can only log into one team at a time.

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

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.

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CC1 Dashboard: Provisioning Features

- Create/edit **call handling resources**
  - Sites
  - Teams
  - Agents
  - Agent profiles
  - Skill definitions
  - Skill profiles
  - Address books

- Create/edit **call management resources**
  - Create entry points and queues
  - Create routing strategies

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CC1 Dashboard: Reporting Features

- Real-Time and Historical Reporting
  - Real-time call statistics
  - 30 minute interval reports since midnight
  - Historical (13 months) reports and trend analysis
  - Call detail reports
- Agent Statistics
  - Report by site, team, or agent
  - Real-time agent state visibility
  - Historical statistics

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CC1 Dashboard: Call Monitoring and Routing

- Call monitoring
  - Silent call monitoring
  - Mid-call monitoring
  - Monitor by v-team, site, and/or team
  - Monitor from any location
- Call Routing
  - View call distribution strategies
  - Create routing schedules
  - Perform changes to routing logic
  - Create new call flows

Entry Points and Queues: Typical Call Flow

1. Toll free number is mapped to an entry point
2. Entry point IVR treatment
3. Call is routed to a specific queue
4. Call in queue is distributed to one or more teams of agents
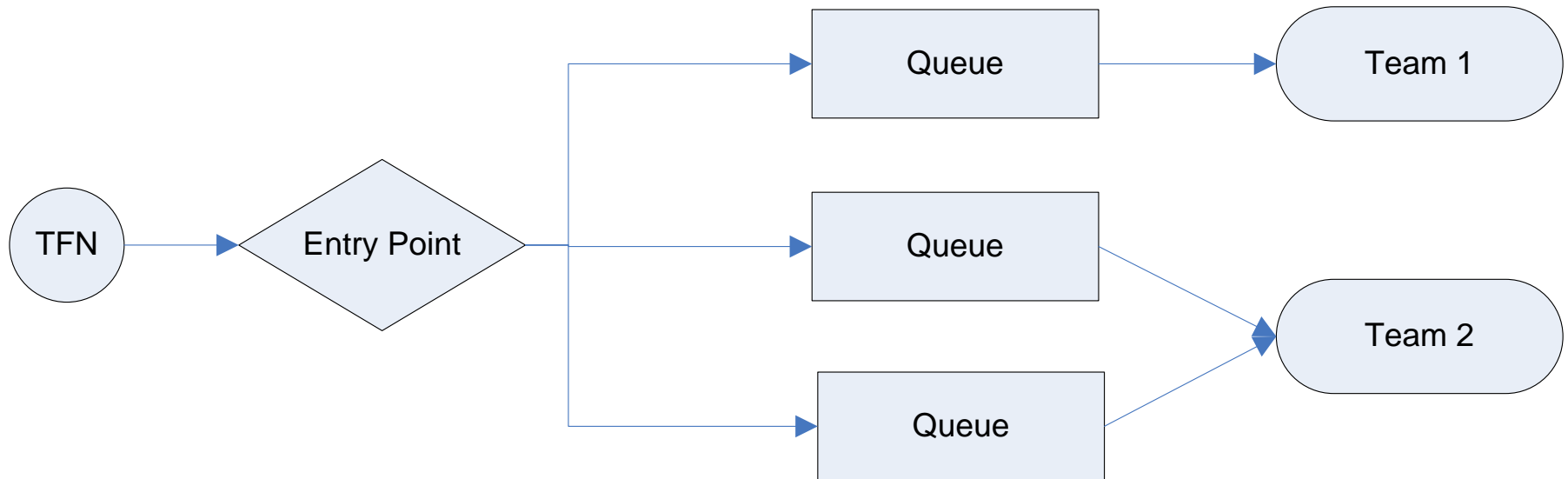
Production Setup Walk-thru

Dashboard Training

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Launching the Dashboard

Dashboard URL: https://portal.ccone.net
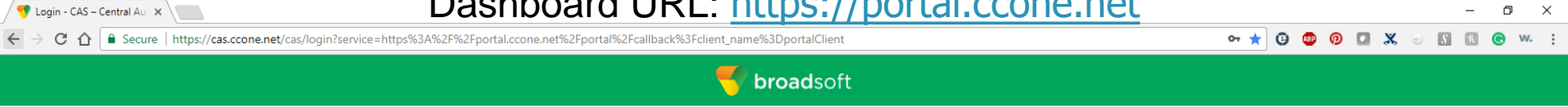
Provisioning Module on Dashboard

CC1 Provisioning - Overview

- Create/edit call handling resources
  - Sites
  - Teams
  - Agents
  - Auxiliary Codes for agent profiles
  - Agent Profiles

- Create/edit call management resources
  - Create Entry Points and Queues
  - Manage DN to Entry Point mapping
  - Create routing strategies

CC1 Provisioning - Agents

- Agents
  - Agents are associated with a site
  - Team(s) are assigned to the agent
  - Agents are assigned to team(s)
  - Agent Profiles are assigned to the agent
- Agent Profiles Consist of:
  - Collaboration settings to enable conference, transfer for selected queues and "Buddy Team" agent targets
  - Available Idle / Wrap-Up Codes

CC1 Provisioning - Teams

- Call Distribution
  - Calls in queues are distributed to teams
  - Agents are assigned to teams
  - Calls in a specific queue can be routed to one or more teams
  - Queue routing strategy determines which the grouping, order, and timing of team distribution
  - Calls can be distributed to agents in a team based on longest available, skills, etc.

CC1 Provisioning – Team Types

- Agent-Based
  - most commonly used type of team
  - composed of agents who select that team when logging in to the applet
  - when an agent is selected, a call is placed to the phone number he or she entered at the log in
  - an agent can only log into one team at a time

- Capacity-Based
  - a different type of team
  - each capacity-based team has an associated phone number
  - when a capacity-based team is selected, a call is placed to that phone number
  - calls in excess of the specified capacity for the team will be queued

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Routing Strategies

Entry Points and Queues

- Team – generic term for both entry points and queues
- Typically the call flow proceeds from entry point to queue
- It is also possible to proceed from entry point to entry point
- Callers typically press keys to make selections in an entry point routing strategy
- It is also possible for the caller to press keys in a queue routing strategy
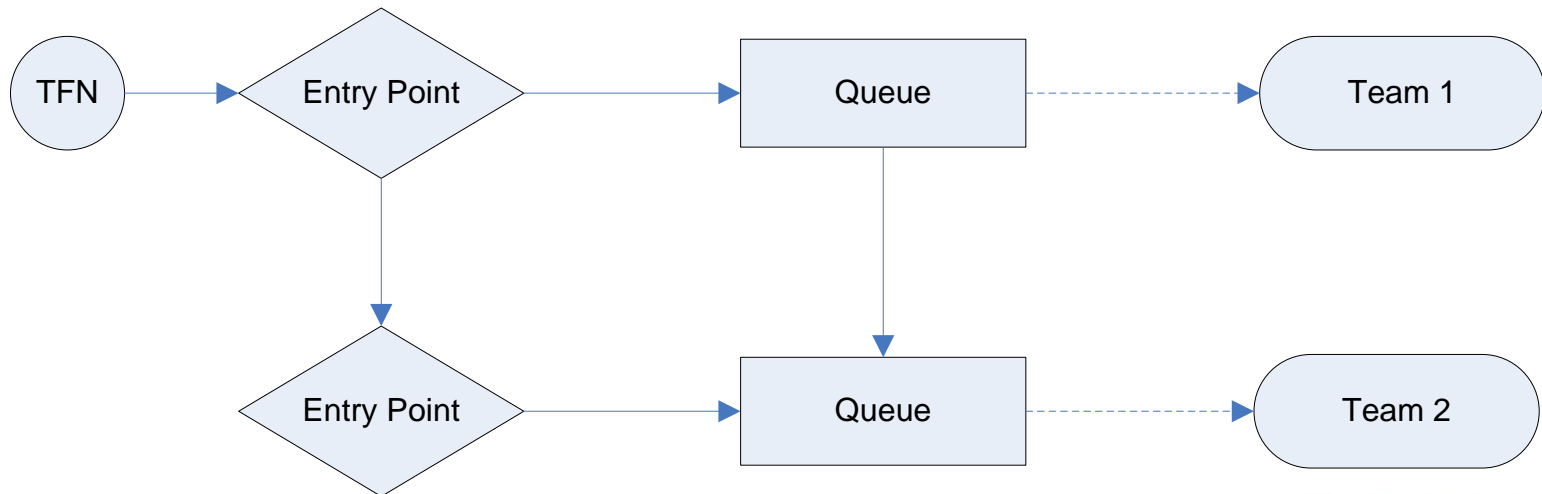
Routing Strategies

- Both entry points and queues require routing strategies

- Routing strategies specify the system behavior

  - Entry Point

    - IVR functionality

    - Screen pop

  - Queue

    - Music/messaging in queue and on hold

    - Routing type

      - Longest available agent

      - Load balance

      - Etc.

    - Call distribution (to agent teams)

- A single entry point or queue may have more than one routing strategy (and typically does)

Control Scripts

- Control behavior of entry points and queues
- Created by CC1 customer success manager or professional services
- Created under Call Flow Builder (CFB)
- Once uploaded/created, may be used in multiple routing strategies
- Note: custom (PS-generated) control scripts may require additional configuration in order to function correctly

Entry Point Example

Routing Strategies

- Default routing strategies cannot overlap with one another

- Non-default routing strategies can overlap with default

- Non-default take precedence

- Non-default routing strategies cannot overlap with other non-default

Non-Default		Emergency Closed		
Default	Closed AM	Open		Closed PM

Routing Strategies (cont.)

Right

| default | Closed AM | Open | Closed PM |

Wrong

| default | Closed AM | Open | Closed PM |

| default | Closed AM | Open | Closed PM |

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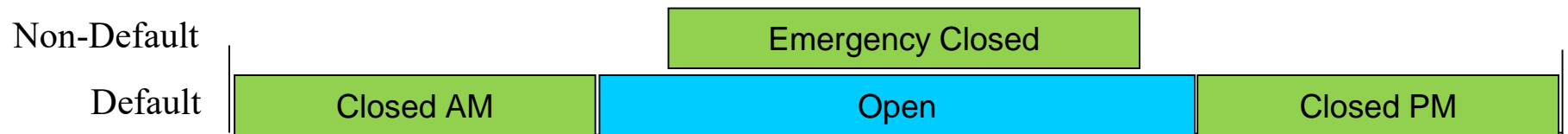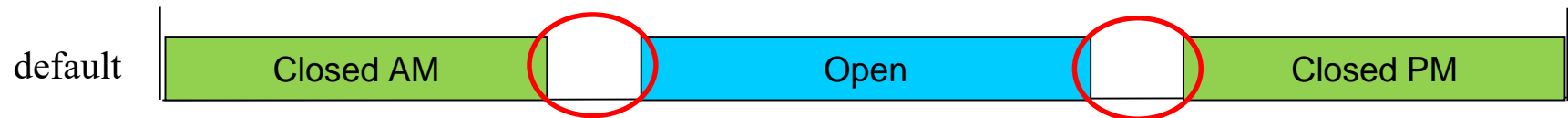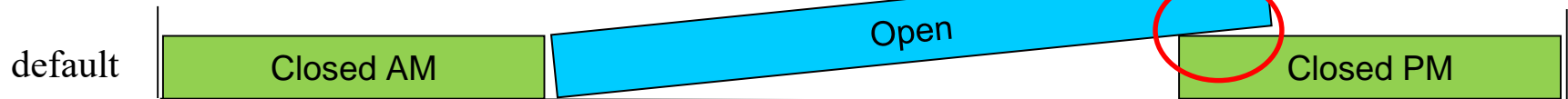
Routing Strategies (cont.)

- Two routing strategy types:
  - Default
  - Non-default
- Specified at time routing strategy is created

Advanced Settings		
Music on Hold	Select an option	▼
Flag as Default Routing Strategy	Yes	

- Two "levels"

Current Routing Strategies

- The current routing strategy is the active routing strategy

- It is a working copy, created by the system, based on attributes such as status, default, start date, start time, etc

- In order for changes to a routing strategy to take effect, you may need to delete the current copy

- A new current routing strategy will be created automatically, assuming an active routing strategy for that time period exists

- The current routing strategy will be regenerated periodically

Current Routing Strategies (cont.)

- Select multiple Entry Points or Queues.
- Display current routing strategies for each.

Global Routing Strategies

- Takes precedence over routing strategies defined "locally" at the entry point or queue level

- A single global routing strategy can be applied to multiple entry points or multiple queues

- Non-default global routing strategy takes precedence over default global routing strategy

- When active, global routing strategy shows up as "current" routing strategy for entry point or queue

Routing Strategies Example

Routing Strategies Example - EP

Routing Strategies Example - Queue

Resources Library – Music & Messaging

Media Files

Audio/Music on Hold

- When a call is queued on the CC1 network, an audio file continues to play until the call is distributed to a team with available capacity.

- If the call is queued for longer than the length of the audio content, the audio file loops back and restarts from the beginning.

- CC1 recommends the audio file include a brief delay message followed by music.

- The message should announce the name of the associated queue or dept the caller has reached, instruct the caller to hold for the next available agent, and "may" if applicable - include a warning that calls may be monitored.

- You can record one audio file for each strategy, so the message can vary by time of day, day of week, holiday schedule, and other factors.

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Media Files (cont.)

Creating Audio-on-Hold Files

If you don't have a source that can professionally record and provide audio music and messaging files, CC1 recommends using the Goldwave Digital Audio Editor to create and manipulate .wav files to use for audio on hold.

This editor can be downloaded from: http://www.goldwave.com/release.php

You can splice the voice prompt content to the front of the music file using the Goldwave application by copying the entire voice waveform and pasting it into the beginning of the music file. Because the file will loop back to the beginning, make sure that the length of the music is sufficiently long to avoid annoying repetition.

You can also use the Goldwave application to convert music from MP3 or other formats. **Be sure to comply with copyright laws for any music you use.**

Use the following file format and settings:
wav: u-Law, 8.000 kHz. 64 Kbps, mono

Give the audio-on-hold file a name that does not exceed 23 characters, including the extension.
Otherwise, you "may" not be able to upload the file to the CC1 system.

Media Files (cont.)

Implementing Audio on Hold

To implement audio on hold:

1. Upload audio files as described in Uploading a Resource File.

2. Create a routing strategy that uses the audio file (see Creating a Routing Strategy).

3. Make a test call to ensure that the appropriate audio file is played when your call is queued.

Call Flow Builder (CFB) – Control Scripts Library

broadsoft

Call Routing | Team Capacity | **Control Scripts** | Resources | Queue Precedence

Control Scripts

Name	ID	Description	Image	Created	Last Updated	Source
2OptionMenu	315			Oct 25, 2016	Oct 25, 2016	Flow Designer
3OptionMenu	316			Oct 25, 2016	Oct 25, 2016	Flow Designer
7OptionMenu	318			Oct 25, 2016	Oct 25, 2016	Flow Designer
9OptionMenu	317			Oct 25, 2016	Oct 25, 2016	Flow Designer
FAQMenu	343			Nov 15, 2016	Nov 15, 2016	Flow Designer
OutdialEP.js	313			Oct 19, 2016	Oct 19, 2016	Custom
OutdialQueue.js	314			Oct 19, 2016	Oct 19, 2016	Custom
Queue	342			Nov 14, 2016	Nov 14, 2016	Flow Designer
queue.js	341			Nov 14, 2016	Nov 15, 2016	Custom

Edit | Copy | Delete | New | Upload | Export Options : Excel CSV

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CFB – Call Flow Builder
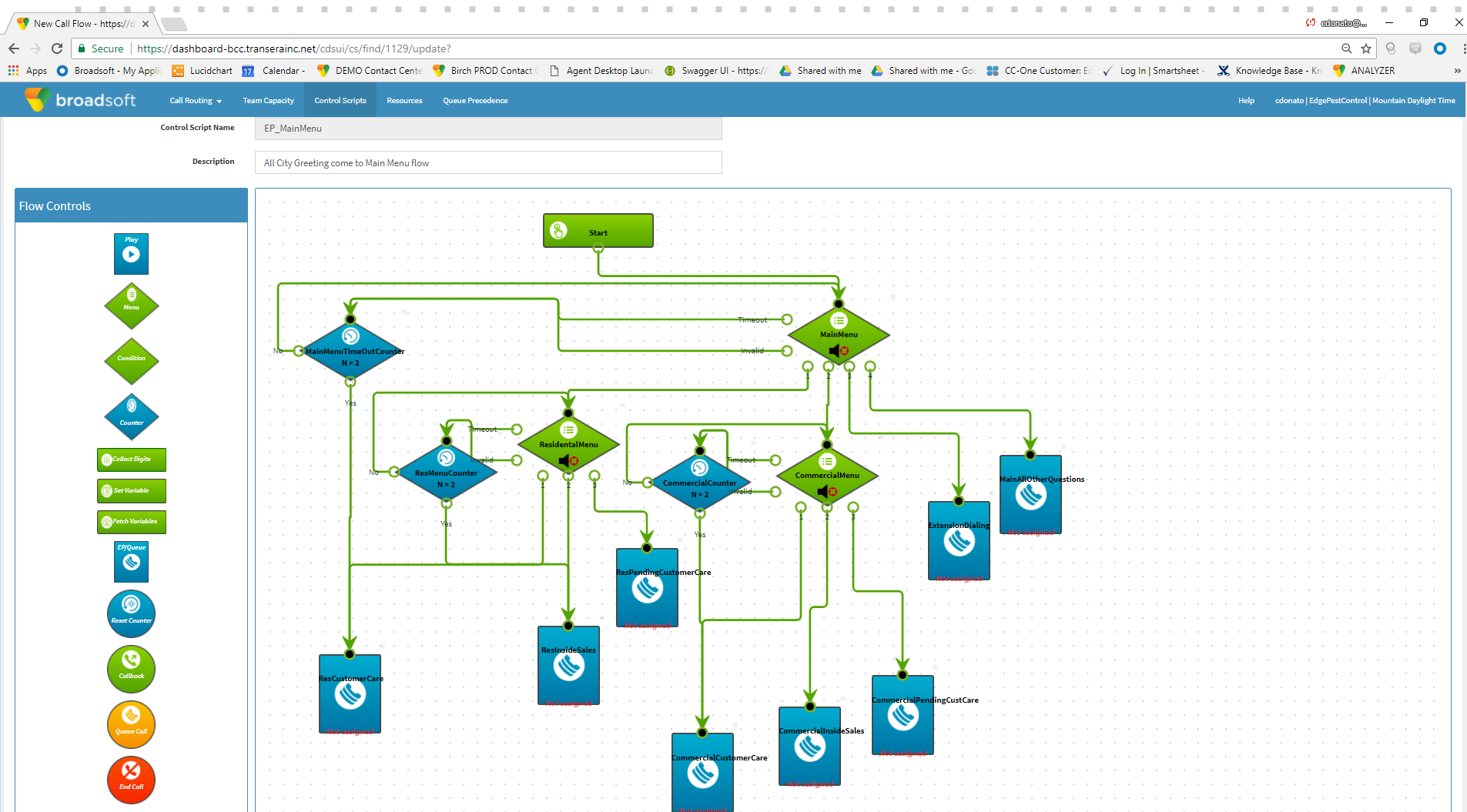
Skills-Based Routing

Skills-Based Routing

- Skills-based routing (SBR) is an optional CC1 feature that enables you to assign skill requirements, such as language fluency or service/product expertise, to incoming calls so they can be distributed to agents with a matching set of skills

EPs, Queues, and Team/Agent Skills

- Entry Point
  - An entry point is the initial landing place for customer calls on the CC1 system
  - One or more toll-free or direct dial numbers can be associated with a single entry point
  - IVR treatment is performed while a call is in the entry point
  - IVR treatment can simply greet caller and pass to queue or greet, present a menu of options and route to the appropriate queue based on the selected option
  - **With SBR, the entry point assigns skill requirements to the call based TFN or IVR selected option**

- Queue
  - A queue is where calls are held while they await handling by an agent
  - Calls are moved from the entry point into a queue and are subsequently distributed to assigned teams to available agents for call handling
  - **With SBR, relax or remove skills to handle inbound calls based on the skill requirement assigned in entry point**

- Skill to Team/Agent Provisioning
  - Provisioning is used to select a skill profile for a team or an agent. If skill profiles are assigned to both a team and to an agent, the agent skill profile will take precedence over a team skill profile

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Skills-Based Routing – Call Flow

Entry Point

Skill Definition

- Skills-based routing begins with the creation of skills definitions. Skill definitions under the provisioning module allows administrators to create, view and edit skills that can be assigned to calls and to skill profiles, which can then be assigned to teams or individual agents.

- The maximum number of active skills are defined by parameters set in the tenant settings. Up to 200 skills definitions can be created on a tenant.

- Once created, skill definitions cannot be deleted from the system.

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Defining Skills

- Skill name – enter name of skill

- Skill description – optionally, enter a description of skill

- Service threshold – # of seconds a customer call can be in queue for this skill before flagged as outside of service level

- Skill status – active or not active

- Skill type:

  - Proficiency – range from 0 to 10

  - Boolean – value of true or false

  - Text – a free form text skill (route by value)

  - Enum – a named set of predefined values, example a product line can include a list of stationary, electronics or office furniture

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Skill Profile

- A skill profile is a set of skills, each with an assigned value 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 skill profile while set to a lower level in another profile.
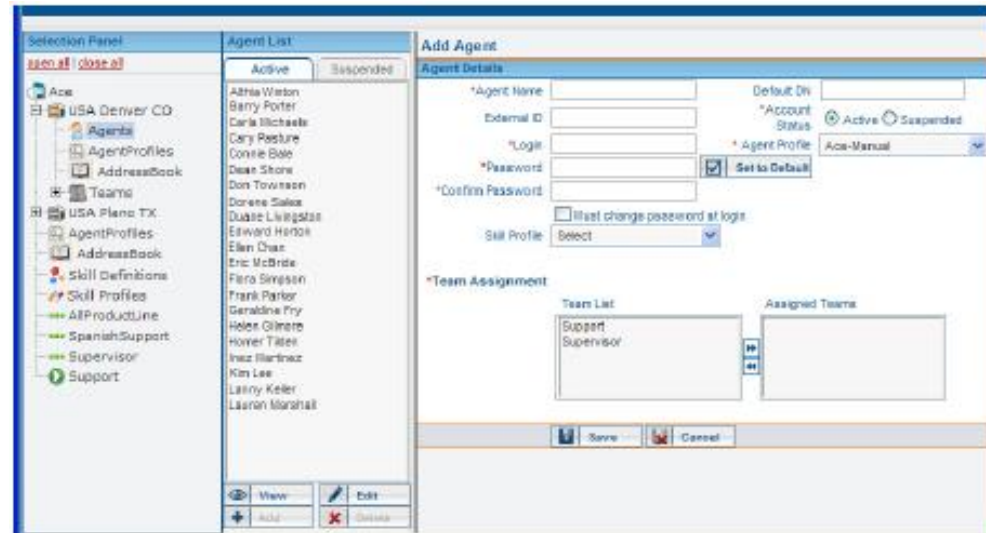
Skill Types

- Select check box to the left of the name of each skill you want to add to the skill profile, and specify the value of each selected skill

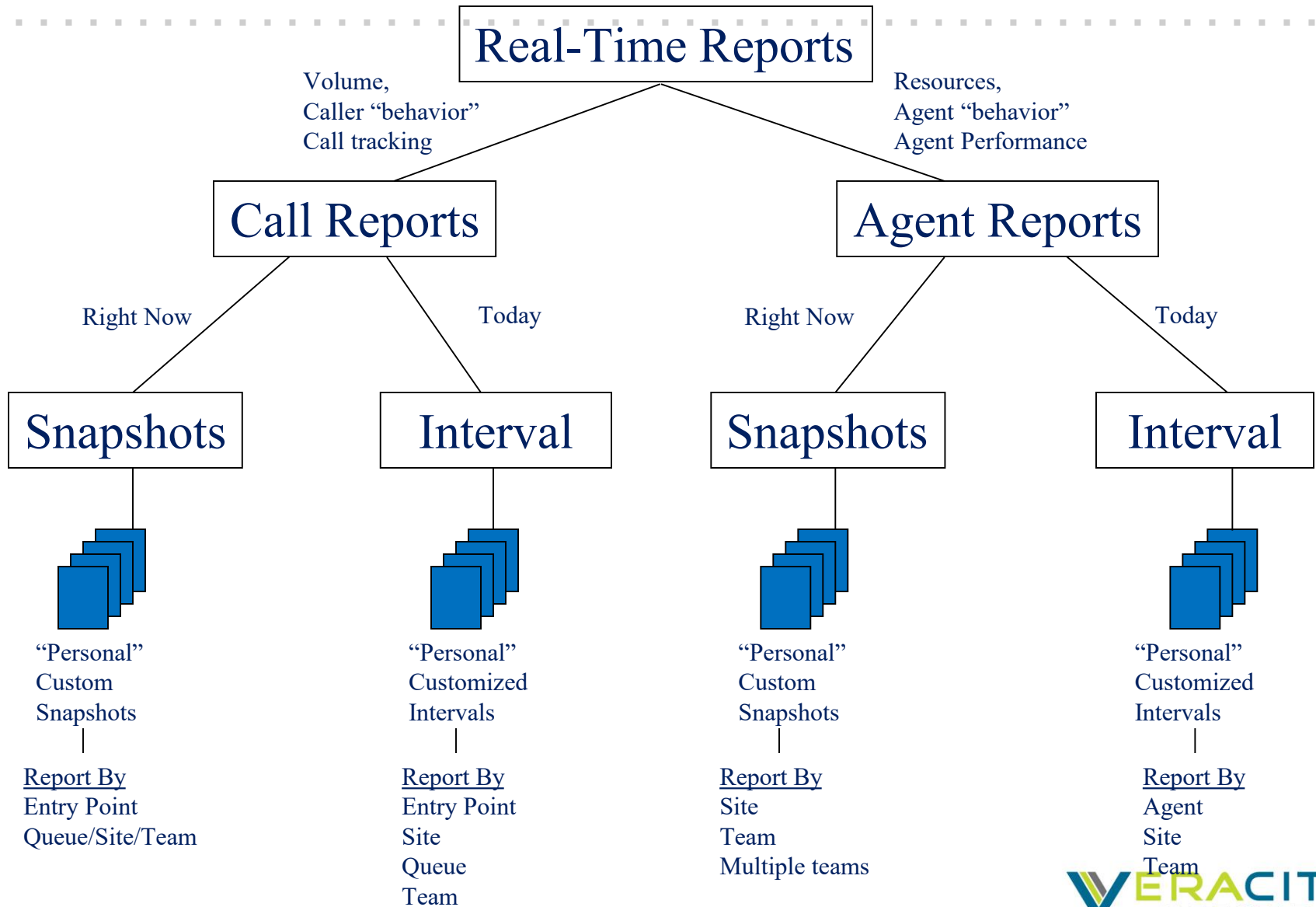| For this skill type	Do this to specify the skill value
proficiency	Drag the slider to a number between 0 and 10 to indicate how proficient the agent is in this skill.
boolean	Click one of the radio buttons to specify whether the agent has this skill (true) or does not have the skill (false).
text	Enter a maximum of 40 characters (including spaces).
enum	Select the check box next to each list value that represents a skill the agent has.

Assigning Skill Profile

- You can optionally select a skill profile for a team or an agent
- If skill profiles are assigned to both a team and to an agent, the agent profile will take precedence over a team skill profile.
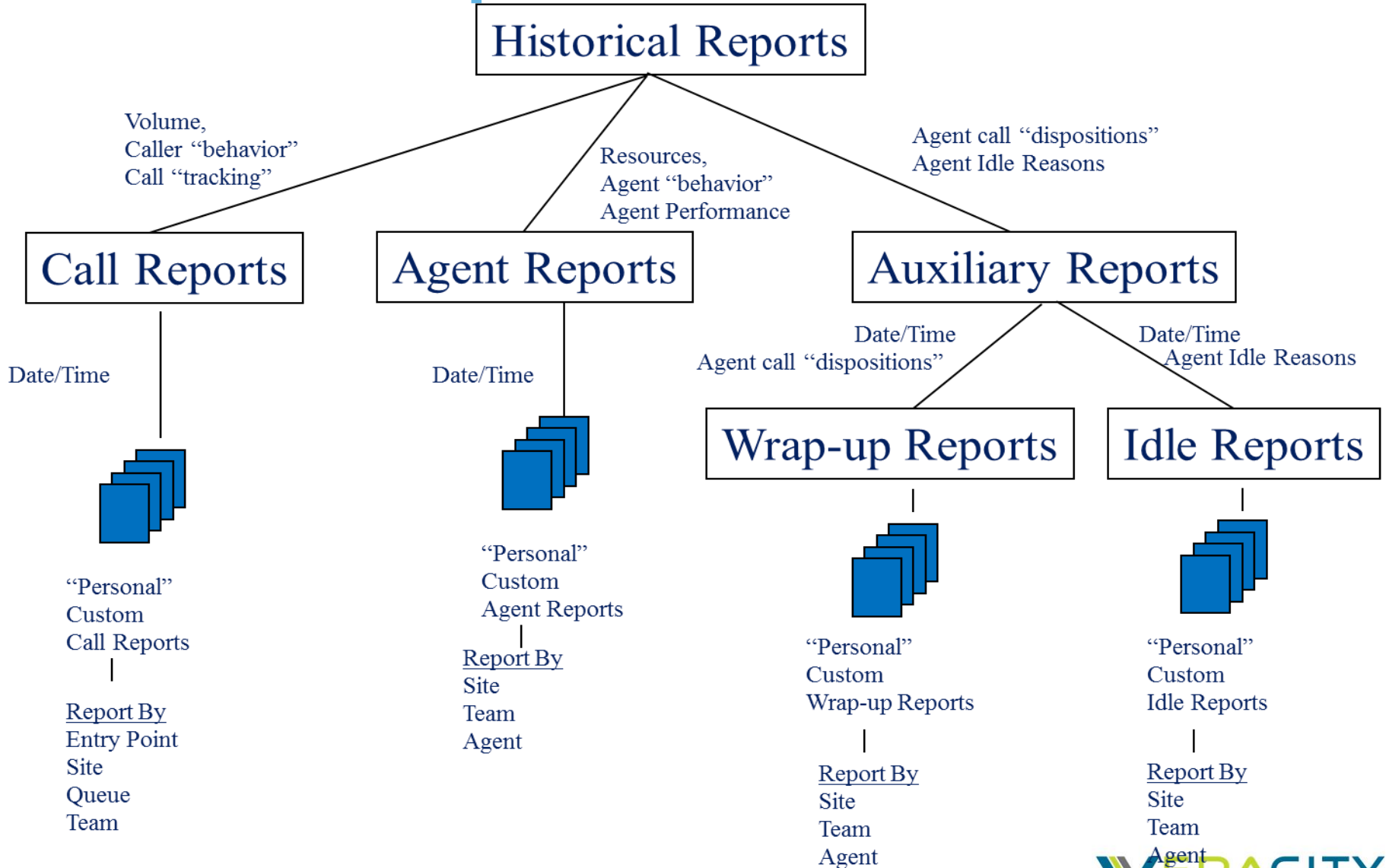- You cannot assign a skill profile to a capacity-based team

Reporting Framework

Real-Time Reports Overview

Real-Time Reports

Volume,
Caller "behavior"
Call tracking

Resources,
Agent "behavior"
Agent Performance

Call Reports

Agent Reports

Right Now

Today

Right Now

Today

Snapshots

Interval

Snapshots

Interval

"Personal"
Custom
Snapshots

"Personal"
Customized
Intervals

"Personal"
Custom
Snapshots

"Personal"
Customized
Intervals

Report By
Entry Point
Queue/Site/Team

Report By
Entry Point
Site
Queue
Team

Report By
Site
Team
Multiple teams

Report By
Agent
Site
Team

Historical Reports Overview

Questions?

Thank You!

Allen Sproul

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