# FINESSE
# SUPERVISOR AGENT RESKILLING
# TRAINING

# UCCE VERSION 12.5

## CISCO CONTACT CENTER ENTERPRISE

# PRESIDIO ™

# WHAT'S CHANGED IN THIS VERSION?

1. The entire interface has been cosmetically redesigned to match the interface of Finesse and CUIC.

# ADMINISTRATION DISCLAIMER

- **Things to Know…**
  - Several agencies use this same portal to manage their own agents.
  - You will only be able to see the agents that you supervise, but you do have the ability to assign them to queues for other agencies.
    - Be sure to only assign your agents to your skills/attributes. If an agent is assigned a skill group/attribute that is not yours, they can and will get a call from another call center.

  - **BE CAREFUL**

# WEB ADMIN LOG-IN

- Open your Mozilla Firefox browser or Internet Explorer and type the following website address https://ccwebadmin.Illinois.gov/cceadmin

Enter Web Admin Website address → Sign in to Unified CCE Adminis... × + https://ccwebadmin.illinois.gov/cceadmin/

- **NOTE**: If page does not load fully and just a blue page is displayed, refresh the page by clicking on the refresh icon ↻ or hitting F5.

# SIGNING IN – SINGLE SIGN ON (SSO)
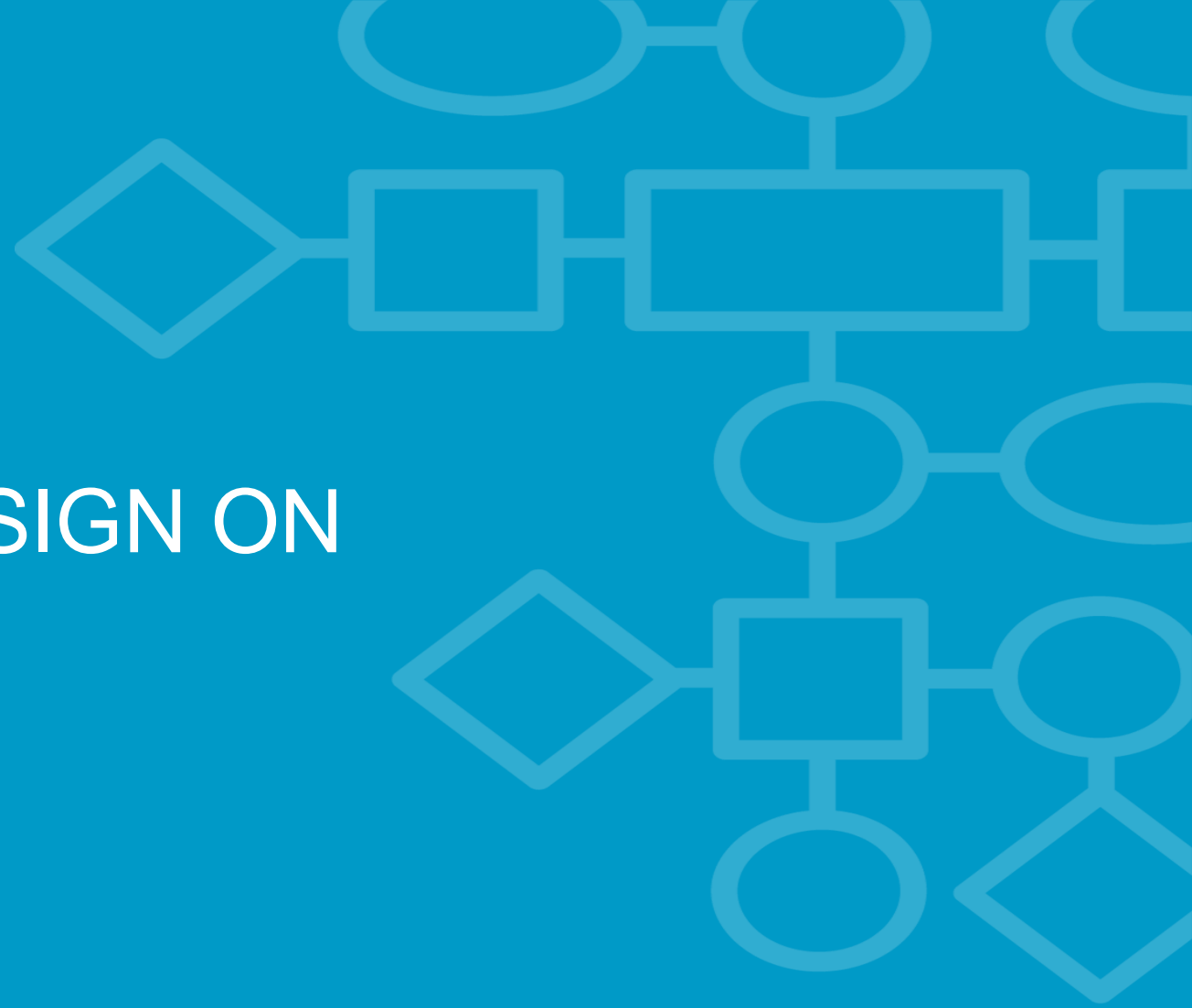
# SIGN-IN: SINGLE SIGN ON (SSO)

**If your agency is using Single Sign On (SSO), use the following:**

- **Username:** Your illinois.gov username
- **Password:** Your Illinois.gov password

To sign in:

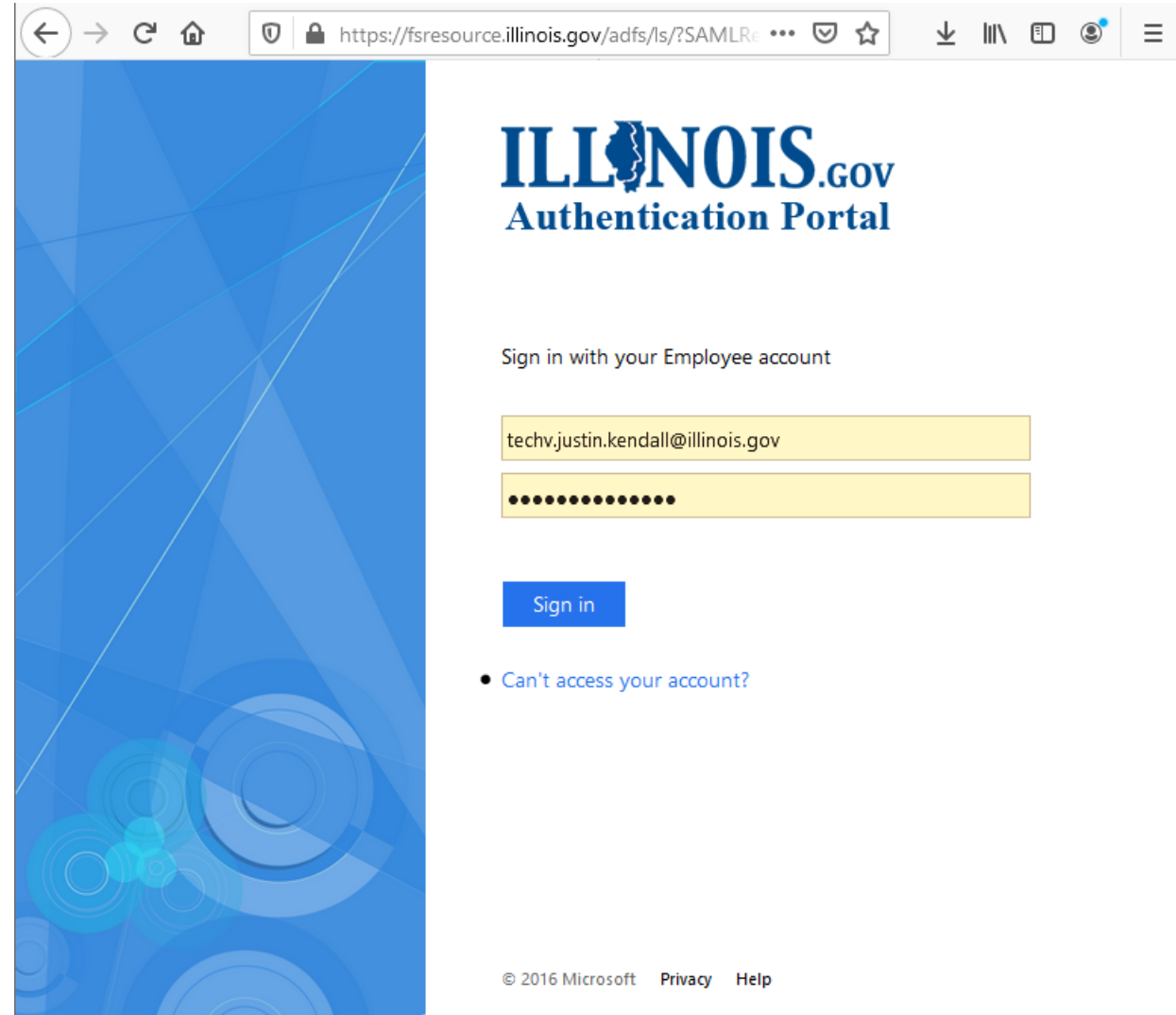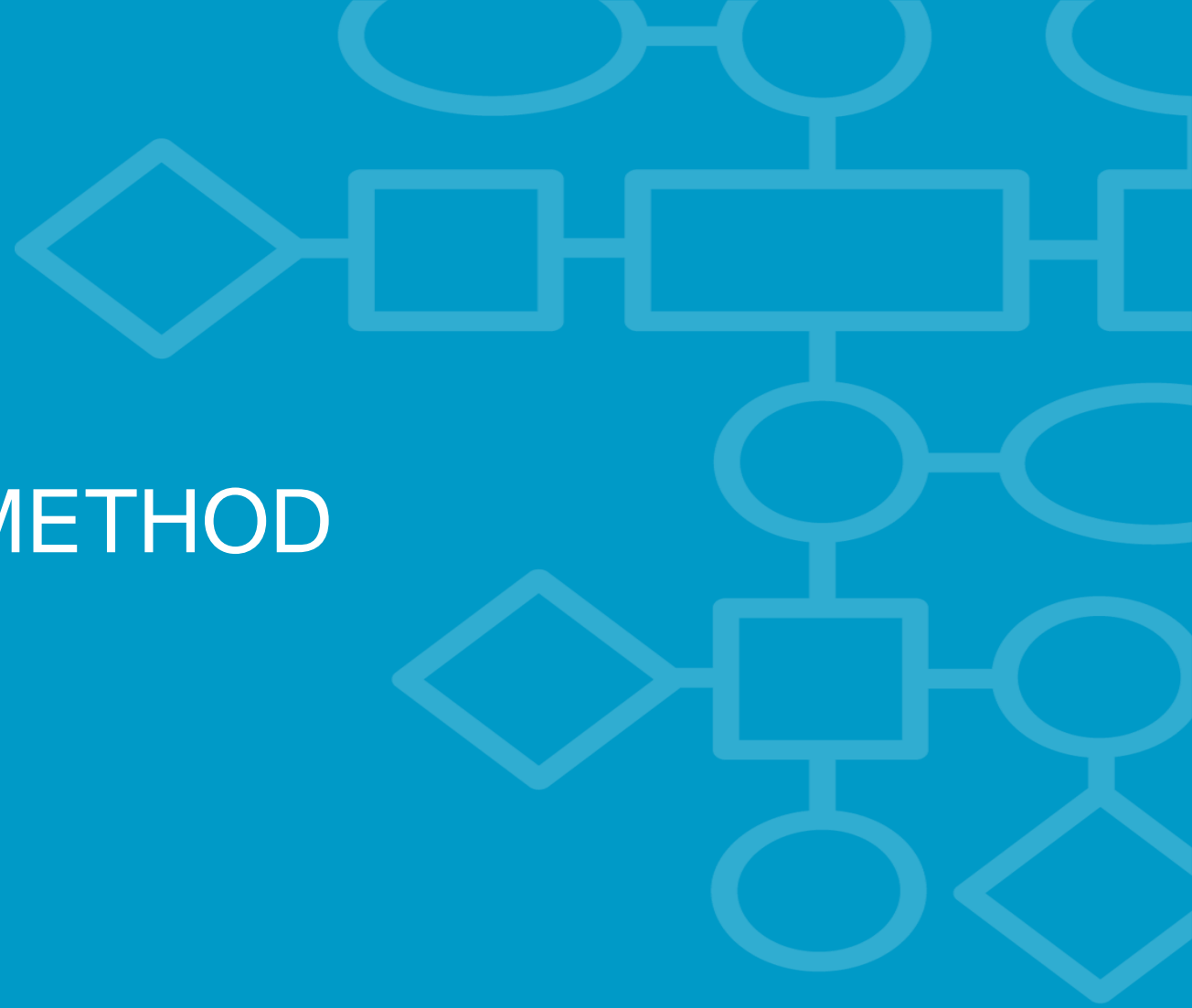1. Enter your Illinois.gov username into the username field
2. Click Next

# ILLINOIS.GOV AUTHENTICATION PORTAL

- After clicking Next, you'll be directed to the Illinois.gov authentication portal to enter your Illinois.gov credentials.

Simply enter your credentials into the fields and click "Sign In"

# SIGNING IN – OLDER METHOD (NON-SSO)

# SIGN IN: NON-SINGLE SIGN ON (SSO)

**Because of the current transition to single sign on, your login information may follow 2 different conventions.**

**If you're an existing supervisor from prior to this upgrade, your login has not changed from the previous version. Use the same information you were using prior to this version upgrade.**

**Convention 1**
- **Username:** Finesse Agent ID + @illinois.gov (ex. 10934@illinois.gov)
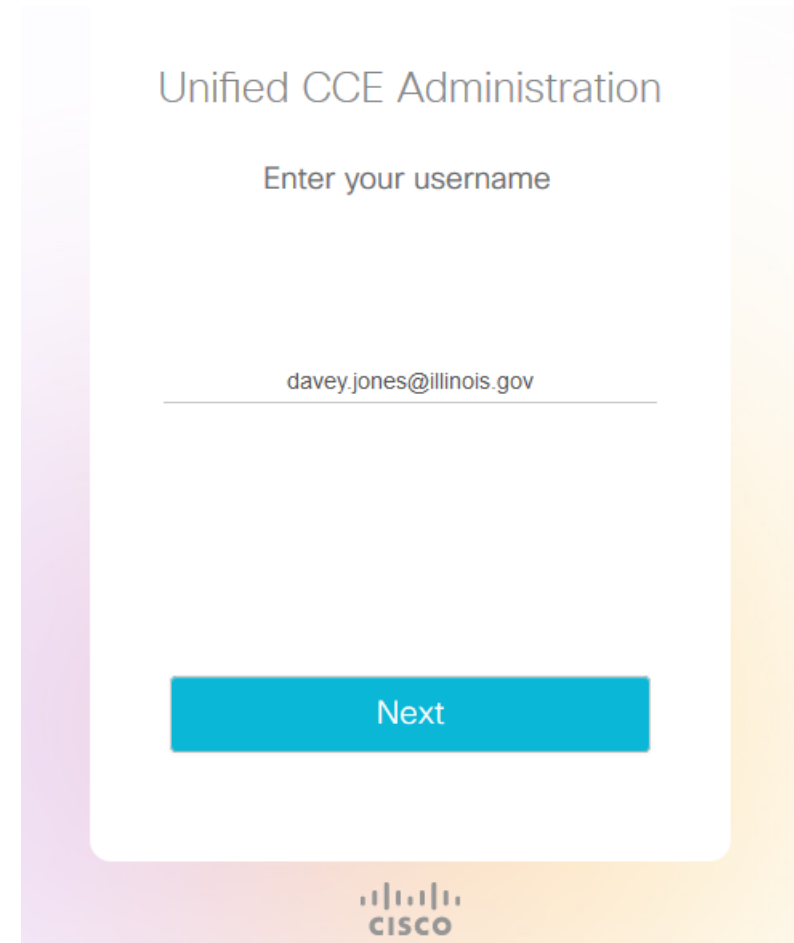
**Convention 2**
- **Username**: Your real illinois.gov username (ex. Kim.Jones@illinois.gov)

# SIGN-IN: NON-SINGLE SIGN ON (SSO)

To sign in:

1. Enter your username into the username field
2. Click "Next"
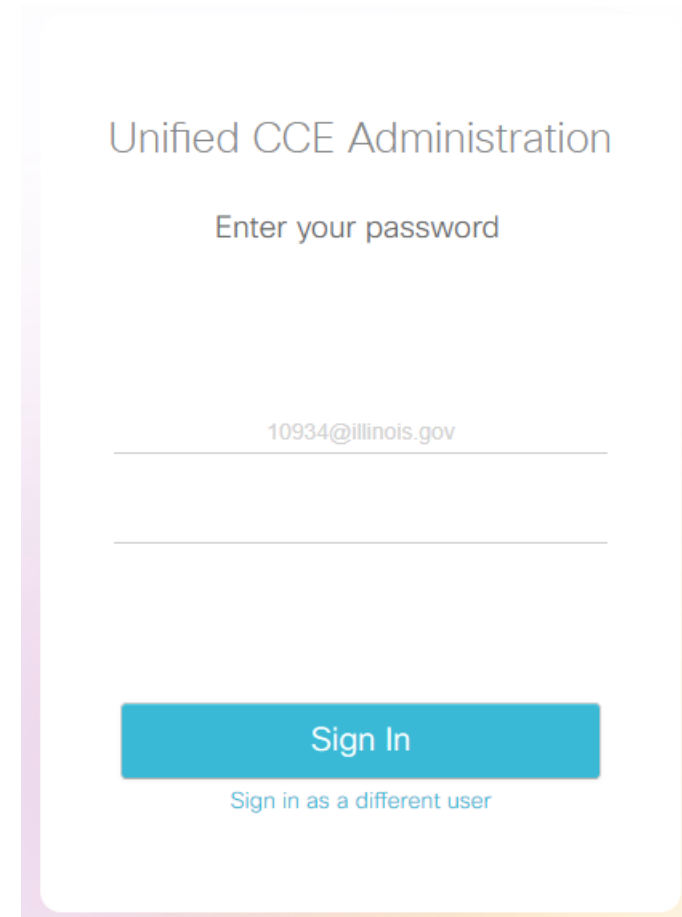
# SIGN-IN: NON-SINGLE SIGN ON (SSO) CONTINUED

After clicking "Next", you'll be presented with the login box to the right

To Sign In:

- Enter the password assigned to the account into the second entry field
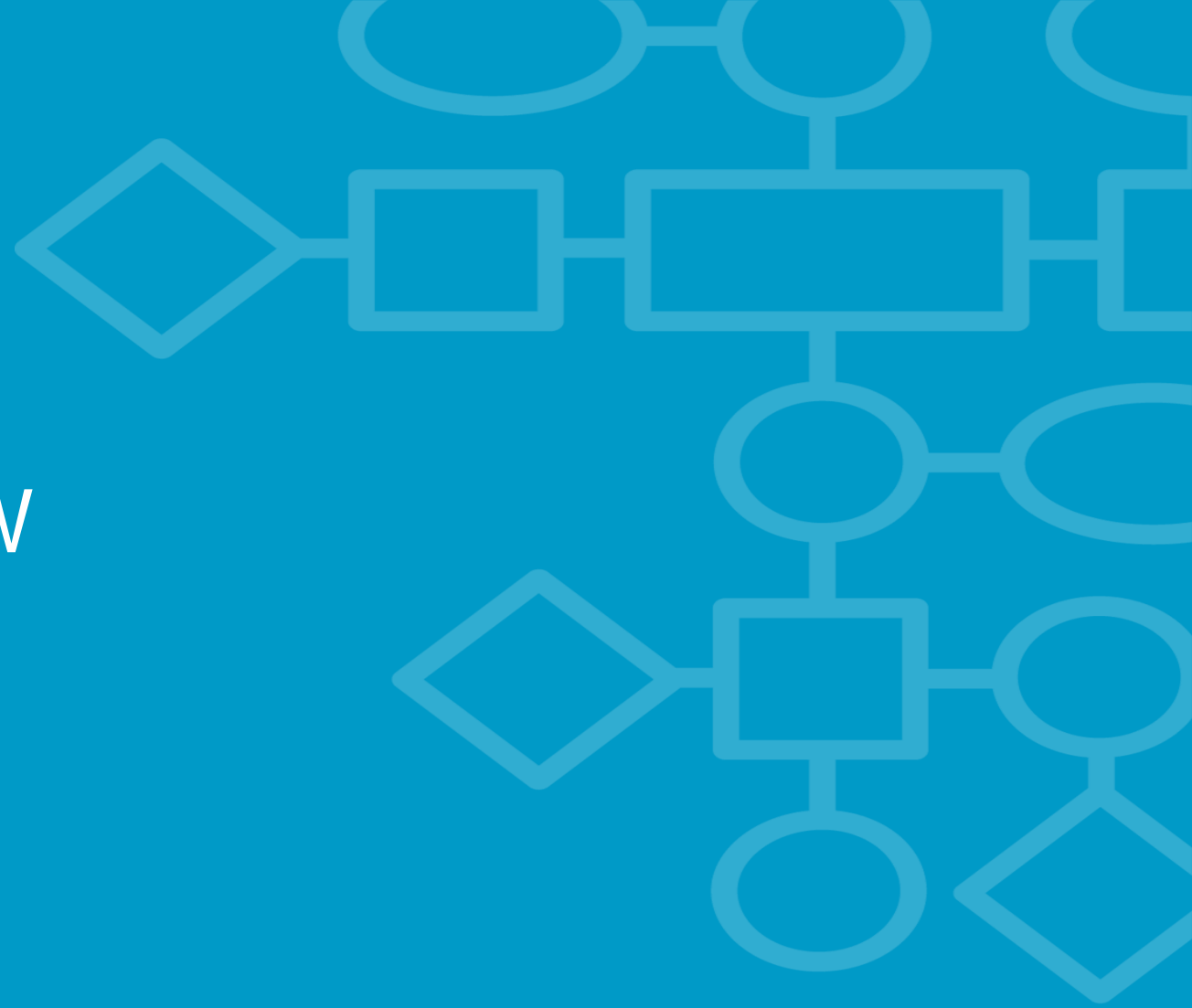- Click "Sign In"



Unified CCE Administration

Enter your password

10934@illinois.gov

Sign In

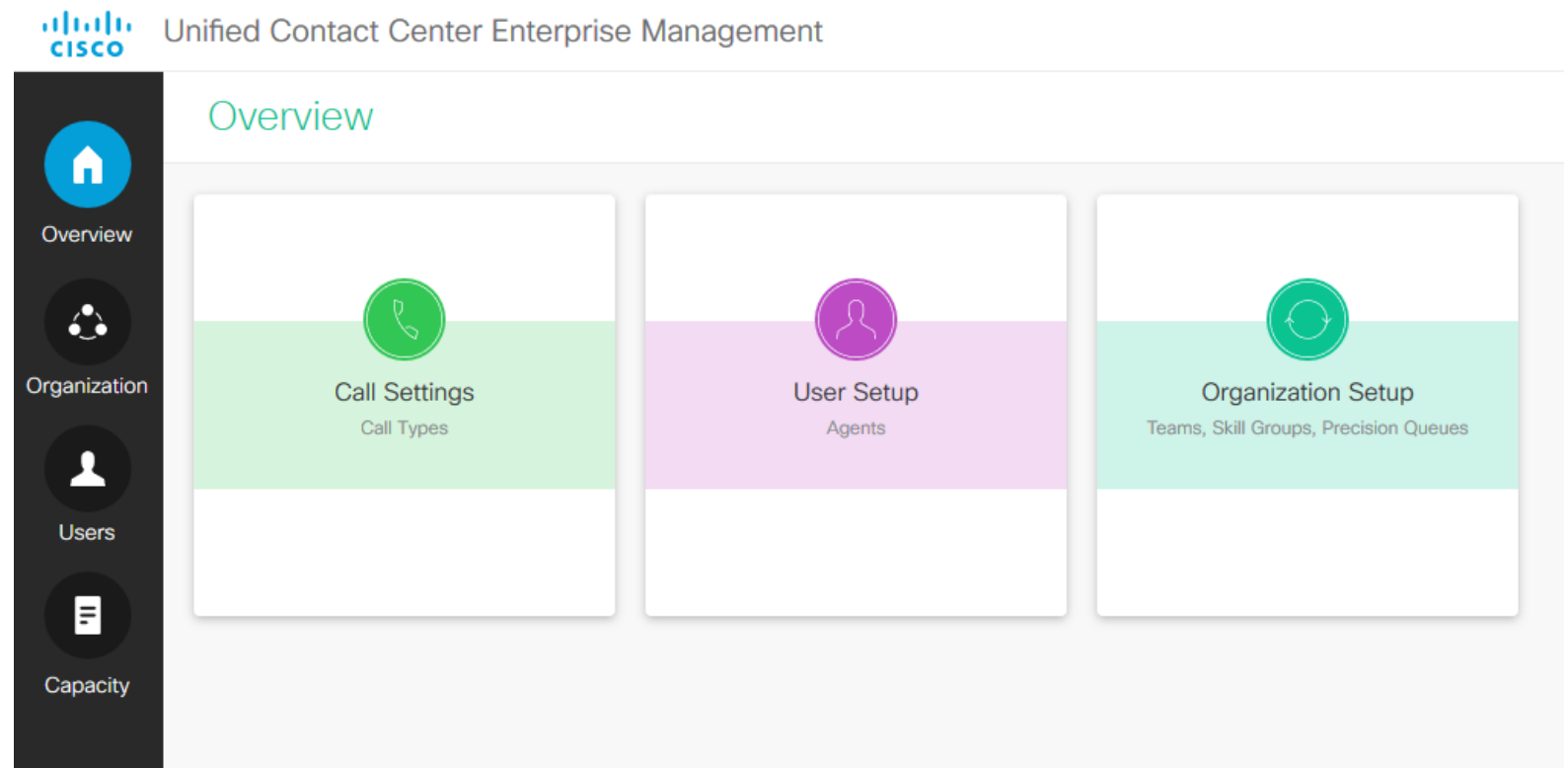Sign in as a different user

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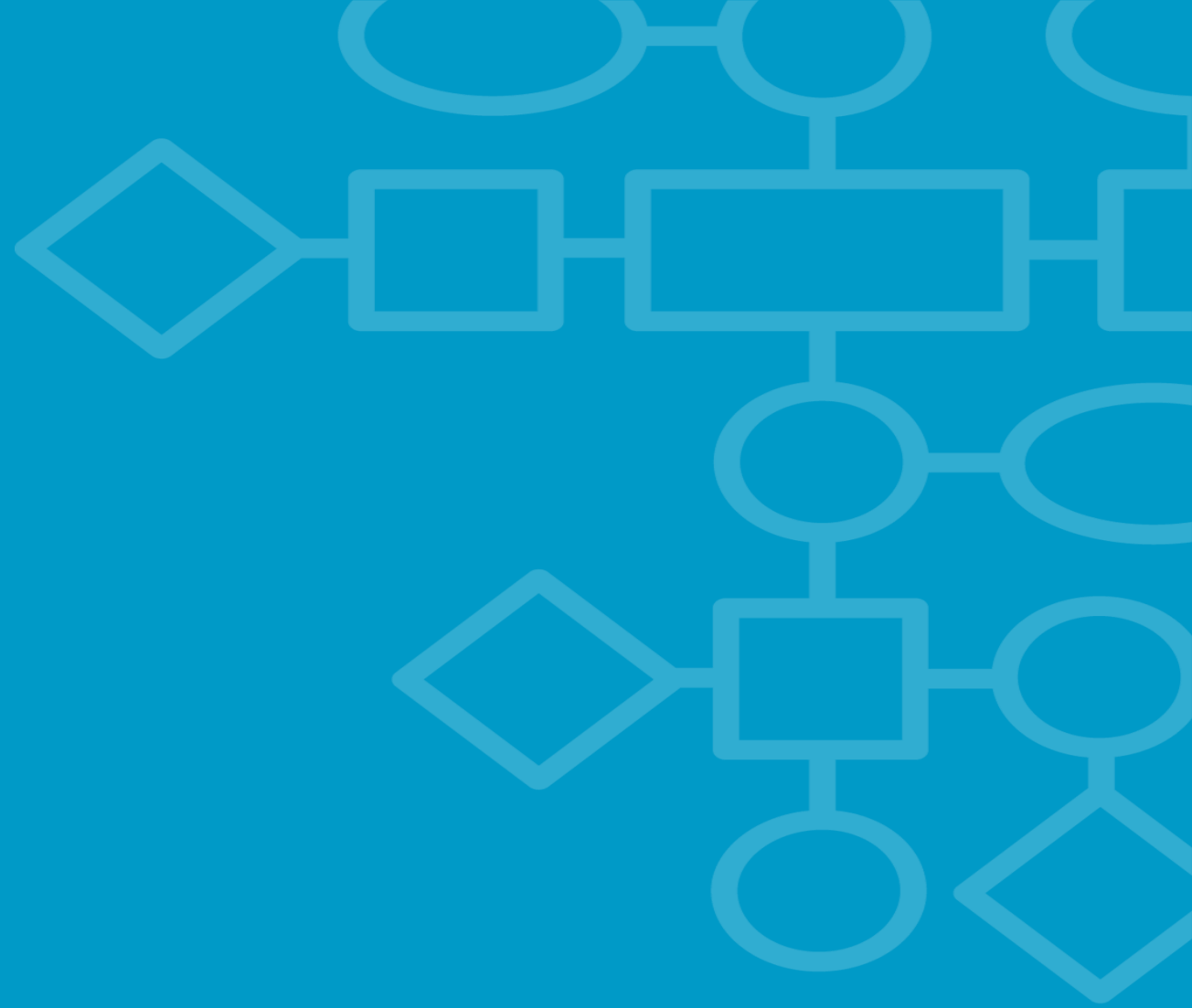# INTERFACE OVERVIEW

# INTERFACE OVERVIEW

- Once logged in, you'll see the main page

As a supervisor, you'll use:
- "User Setup"
  - Here you'll find the agents that you supervise
- "Organization Setup"
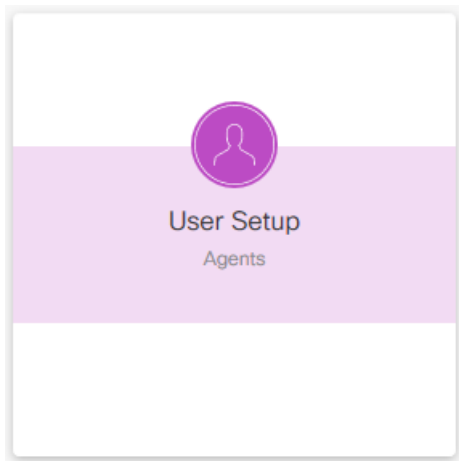  - Here you'll find queue configurations

# NAVIGATION

# NAVIGATING AREAS

- To navigate between areas of the site, you can either click on the square section "card" on the main page or click the appropriate section in the left-hand navigation
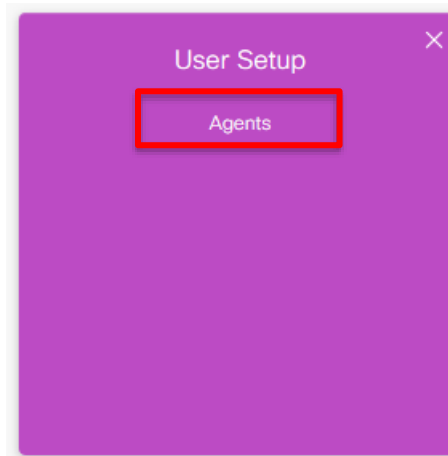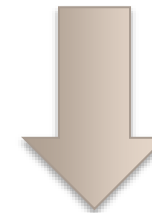
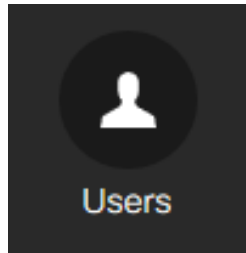Clicking the card

Clicking an item in the submenu

Opens the submenu

Opens the section

# NAVIGATING WITH DRAWERS

- Alternatively, you can navigate with the drawers on the left-hand navigation:

Clicking a drawer

Opens the submenu
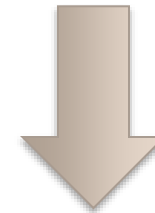
Clicking an item in the submenu

Opens the section

# AGENT QUEUE ASSIGNMENTS

# SKILL GROUPS VS PRECISION QUEUES

Depending upon your agency, you may be using Precision Queues or Skill Groups for your queues.

Depending upon which one is being used by your agency, proceed to the following "Precision Queues" or "Skill Groups" section accordingly.

- **If you have not previously assigned agents to queues and do not know which is being used for your agency, please consult with an existing supervisor, manager, or telecom coordinator that currently assigns agents to queues**

# PRECISION QUEUES
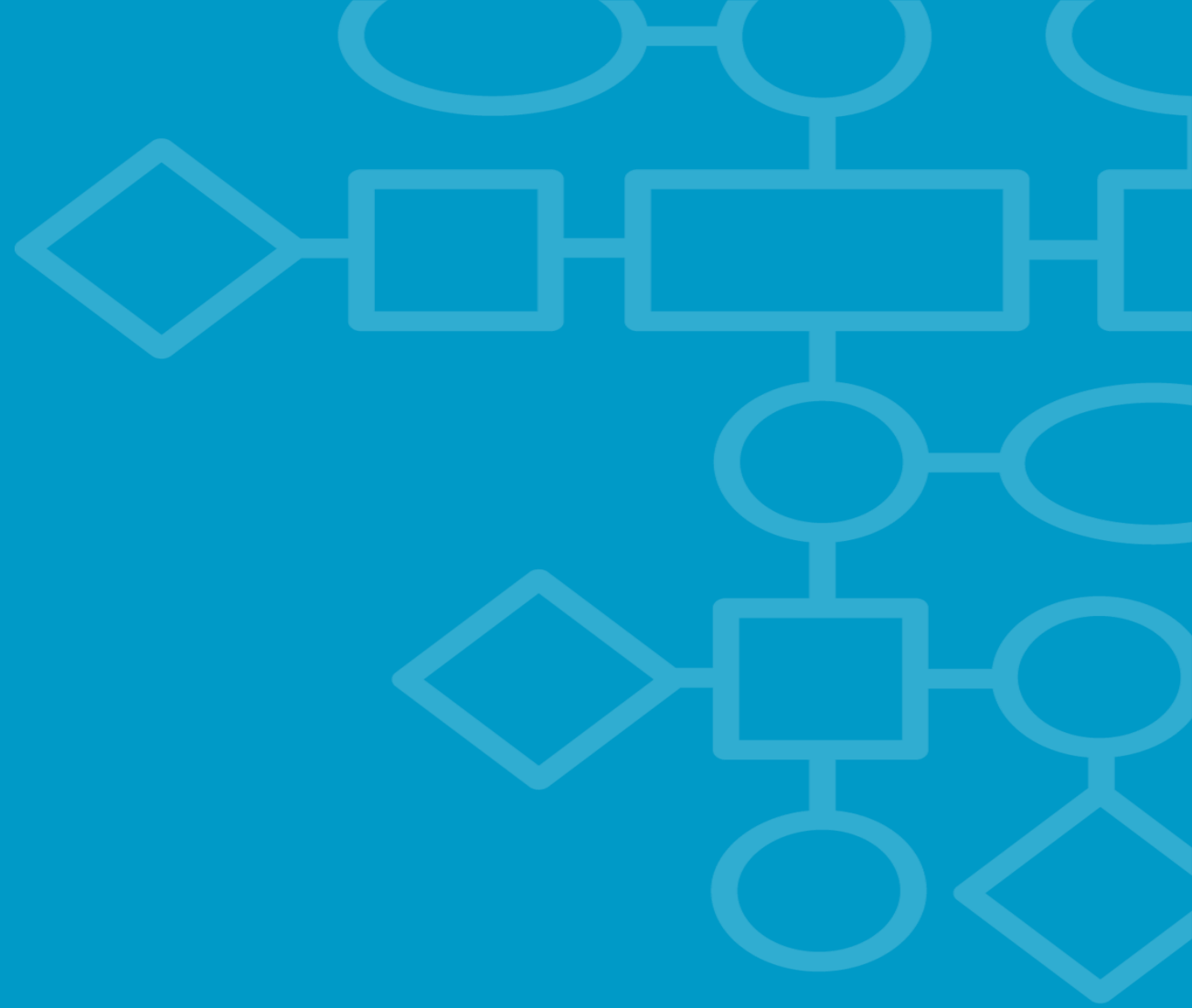
# FIND PRECISION QUEUES

- Select **Organization Setup → Skills**



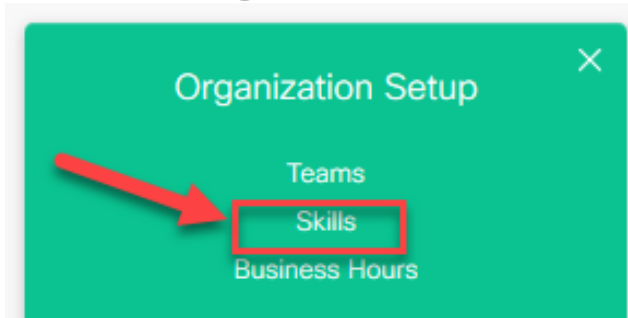- **Select Precision Queues on the right-hand side**

# LIST OF PRECISION QUEUES

1. Use the search to find or scroll to the Precision Queue you're looking for.
2. Click on the Precision Queue you would like to view in the list.

## Skills

Skill Groups   Precision Queues   Attributes

| Name | ID | Attributes | Agents | Description |
|------|-----|-----------|--------|-------------|
| PG1.test.PrecisionQueue | 5000 | PG1.Test.PQAttribute | 3 | test pq |
| PG1.test.PrecisionQueue2 | 5001 | PG1.test.PQAttribute2 | 0 | |
| Test.CCB.Task | 5002 | PG1.Test.PQAttribute | 3 | |

# PRECISION QUEUE SETTINGS

- Once you've selected the Precision Queue from the list, you'll see a read-only view of the current settings.

**Skills**

Skill Group

View PG1.test.PrecisionQueue

| | |
|---|---|
| Name | PG1.test.PrecisionQueue |
| Description | test pq |
| Media Routing Domain | Cisco_Voice |
| Service Level Type | Ignore Abandoned Calls |
| Service Level Threshold | 60 seconds |
| Agent Order | Longest Available Agent |
| Bucket Interval | System Default |
| ID | 5000 |

**Steps**

| Name | Criteria | Agents (Config) | Wait Time |
|---|---|---|---|
| Step 1 | (PG1.Test.PQAttribute >= 5) | 3 | n/a |

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- Settings Fields:
  - **Steps**: The attribute criteria required in order for a call to be presented to an agent.

  - **Agent Order**
    - Longest Available Agent
    - Most Skilled Agent
    - Least Skilled Agent

The combination of the **Steps** settings and **Agent Order** settings should be used to determine which attributes and which attribute values should be assigned to agents.

  - **Service level Settings**
    - Service Level Type
    - Service Level Threshold

# PRECISION QUEUE AGENT ORDER EXPLAINED

- Precision Queues will search for agents that have specific attributes by one of three methods:
  - **Most Skilled Agent (Used by 95% of queues)**: The agent who has the highest attribute value will be selected for the next call. If there are multiple "Ready" agents with the same attribute value, ties are broken by selecting the agent who has answered a call least recently.

  - **Longest Available Agent**: The agent who has answered a call least recently, regardless of attribute value, will be selected for the next call.

  - **Least Skilled Agent**: The agent who has the lowest attribute value will be selected for the next call. If there are multiple "Ready" agents with the same attribute value, ties are broken by selecting the agent who has answered a call least recently.

# ASSIGN ATTRIBUTES

- In order to assign attributes to an agent:
  1. Navigate to **Manage → Agents**
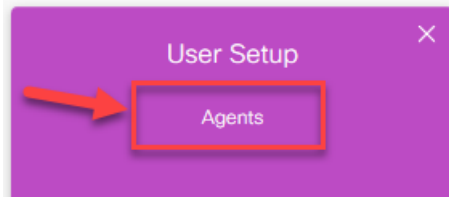
  

  2. Search for or scroll to the agent you'd like to assign

  ## Agents

  | | Username | | Peripheral | Last Name | First Name | Description |
  |---|---|---|---|---|---|---|
  | ☐ | 20000 | ▲ | PG1.UCM | Agent1 | Test | |
  | ☐ | 20002 | | PG1.UCM | Agent2 | Test | |

  3. Select the agent from the list by clicking anywhere on that row
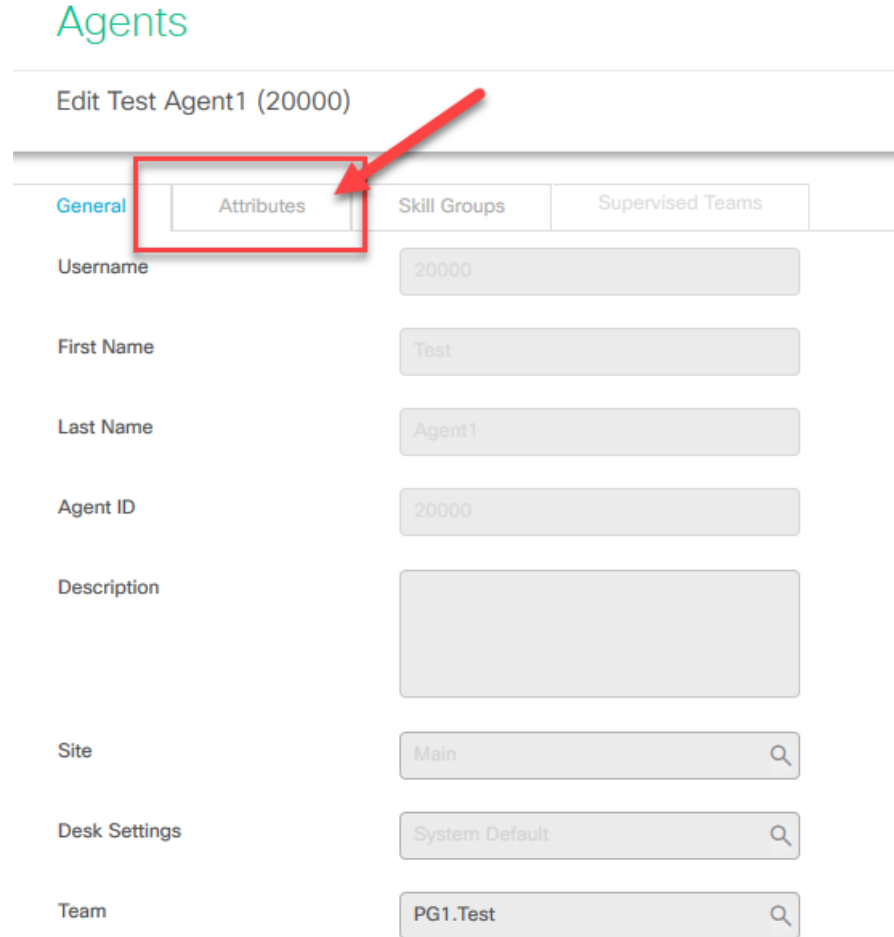
# ASSIGN ATTRIBUTES CONTINUED

4. On the agent settings page, select the Attributes Tab

## Agents

Edit Test Agent1 (20000)

| General | Attributes | Skill Groups | Supervised Teams |

Username | 20000

First Name | Test

Last Name | Agent1

Agent ID | 20000

Description

Site | Main

Desk Settings | System Default

Team | PG1.Test

# ASSIGN ATTRIBUTE CONTINUED

5. Click the "plus" button

6. Search for your specific agency or, if applicable, bureau or department

7. Select the attribute name

# ASSIGN ATTRIBUTE CONTINUED

8. Click the drop-down box and select value

9. Click Save in the bottom right corner of the page  when complete

# REMOVE ATTRIBUTE

- Click the "x" button to remove the attribute



- Click Save on the bottom right corner of the page when complete
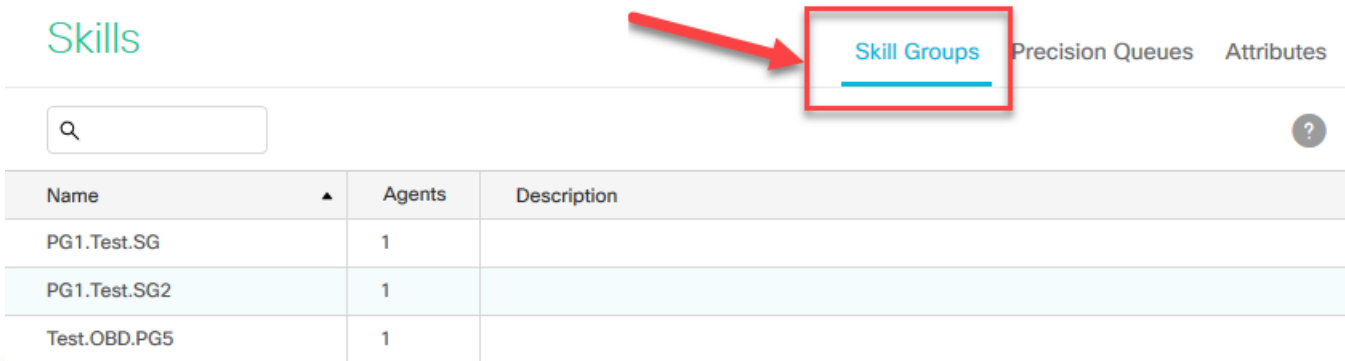
# SKILL GROUPS

# FIND SKILL GROUPS

- Select **Organization Setup → Skills**
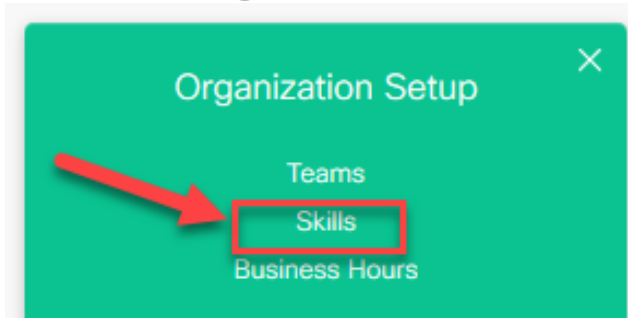


- **Select Skill Groups on the right-hand side**

# LIST OF SKILL GROUPS

1. Search for or scroll to the Skill Group you would like to view
2. Click anywhere on the row of the Skill Group

# SKILL GROUP SETTINGS

The Skill Group settings page contains two tabs:

- General
  - General settings for the Skill Group
    - Can view Service Level Settings
    - Other settings can be ignored
- Members
  - Contains the list of agents that have been assigned to the Skill Group

Edit PG1.Test.SG

| General | Members |

| Name | PG1.Test.SG |

| Description | |

| Site | Main |

| Media Routing Domain | Cisco_Voice |

| Bucket Interval | BuiltIn |

| Service Level Threshold | System Default (Unknown) | seconds |

| Service Level Type | Ignore Abandoned Calls |

| Peripheral Number | 5000 |

# SKILL GROUP QUEUE ASSIGNMENTS

Agents can be assigned to a Skill Group via three methods:

1. **By Queue**
   – This method is most useful when assigning multiple agents to the same queue
2. **By Agent**
   – This method is most useful when assigning multiple queues to the same agent
3. **By Multiple Agents**
   – This method is most useful when assigning multiple agents to the same multiple queues

The following slides go through each of these methods

# SKILL GROUP QUEUE ASSIGNMENT – BY QUEUE

1. Navigate to the Members tab of the Skill Group

# SKILL GROUP QUEUE ASSIGNMENT – BY QUEUE CONTINUED

2. Click the plus icon to add skills and search for your department

3. Search for or scroll to the agent in the list of agents

4. Click on the agent in the list

5. Click Save on the bottom right corner of the page when complete

# REMOVE AGENT – BY QUEUE

While in the Skill Group Members page:

- Click the "x" button to remove the agent from the queue
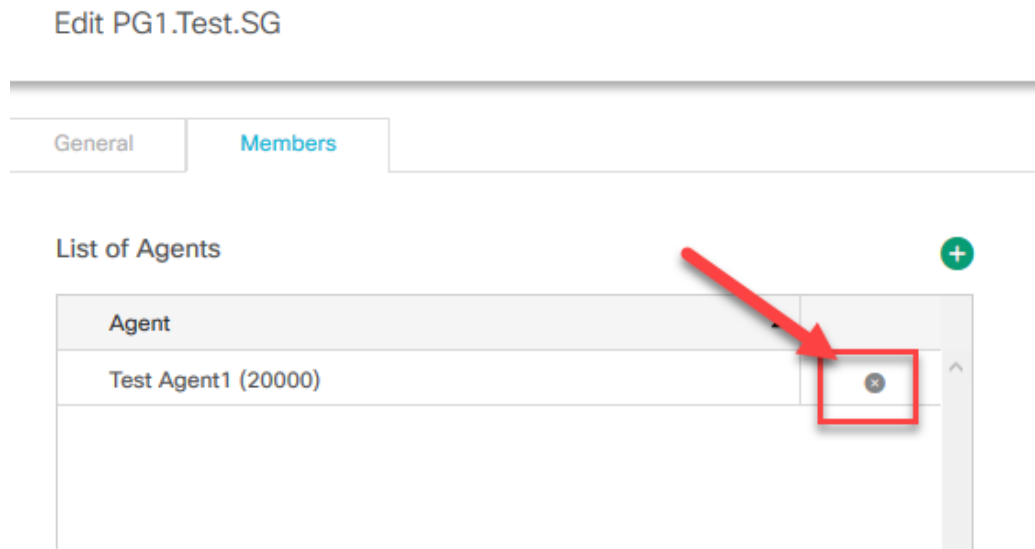


- Click Save on the bottom right of the page when complete

# SKILL GROUP QUEUE ASSIGNMENT – BY AGENT

- In order to assign skill groups to an agent:
    1. Navigate to **Manage → Agents**
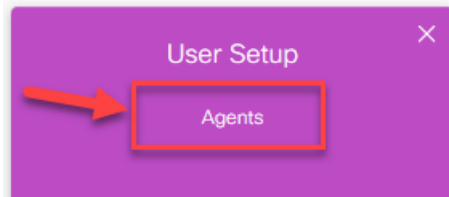


    2. Search for or scroll to the agent you'd like to assign

## Agents

| Username | | Peripheral | Last Name | First Name | Description |
|---|---|---|---|---|---|
| ☐ | 🔍 | ⊕ | | | |
| ☐ Username ▲ | | Peripheral | Last Name | First Name | Description |
| ☐ 20000 | | PG1.UCM | Agent1 | Test | |
| ☐ 20002 | | PG1.UCM | Agent2 | Test | |

    3. Select the agent from the list by clicking anywhere on that row
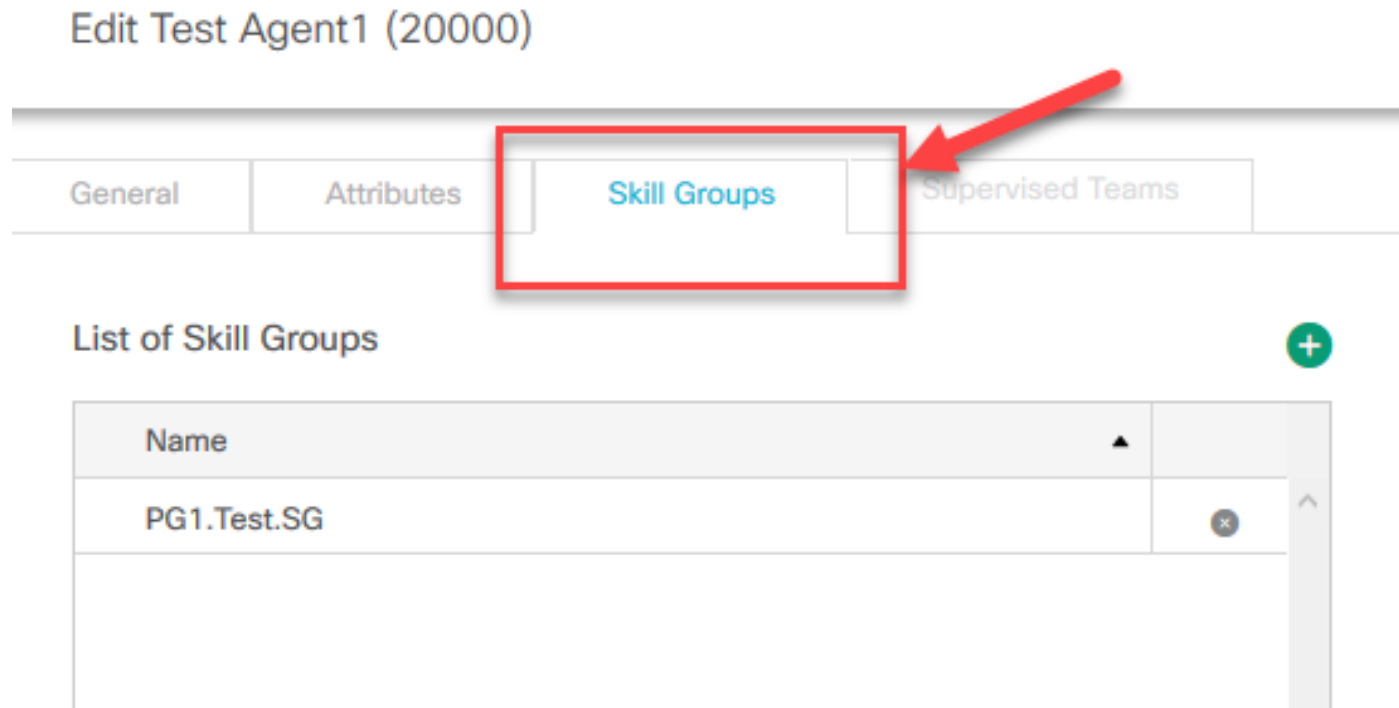
4. Select the Skill Groups tab

# SKILL GROUP ASSIGNMENT – BY AGENT FINAL

5. Click the **Add** button

6. Search for your agency and/or, if applicable, your appropriate department or bureau

7. Click on the Skill Group

(You'll see the selected skill group populate in the list of Skill Groups for the agent)

8. Click Save on the bottom right corner of the page when complete

# REMOVE SKILL GROUP

To remove a Skill Group assignment from an agent:

1. Click the "x" button beside the Skill Group

Edit Test Agent1 (20000)

| General | Attributes | Skill Groups | Supervised Teams |

**List of Skill Groups**

| Name | |
|------|---|
| PG1.Test.SG | ⊗ |
| PG1.Test.SG2 | ⊗ |
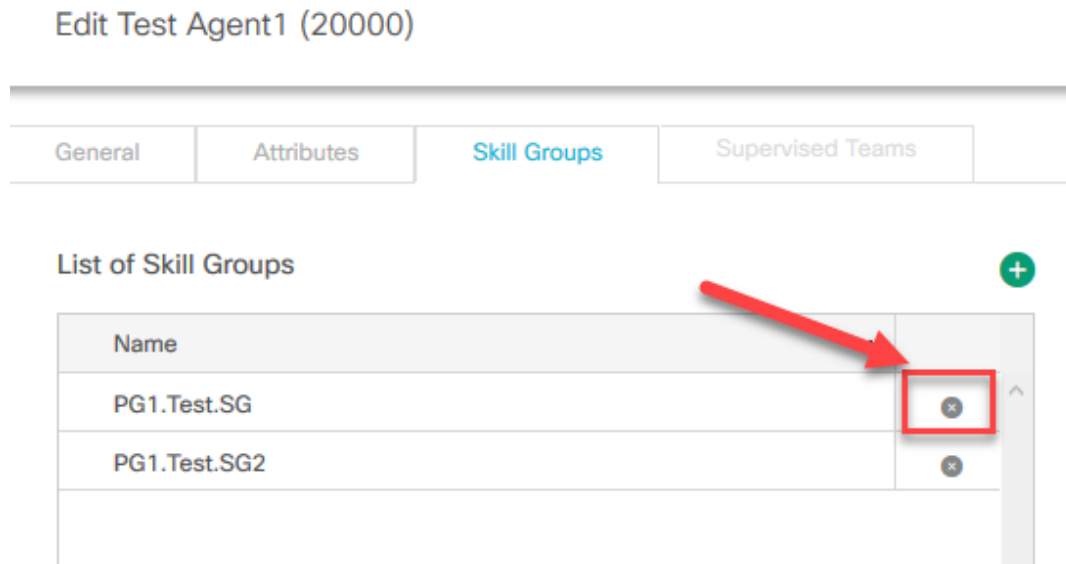
2. Click Save on the bottom right corner of the page when complete

# SKILL GROUP QUEUE ASSIGNMENT – MULTIPLE AGENTS

- In order to assign skill groups to an agent:
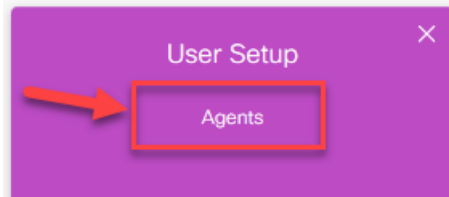
  1. Navigate to **Manage → Agents**



  2. Search for or scroll to the agent you'd like to assign
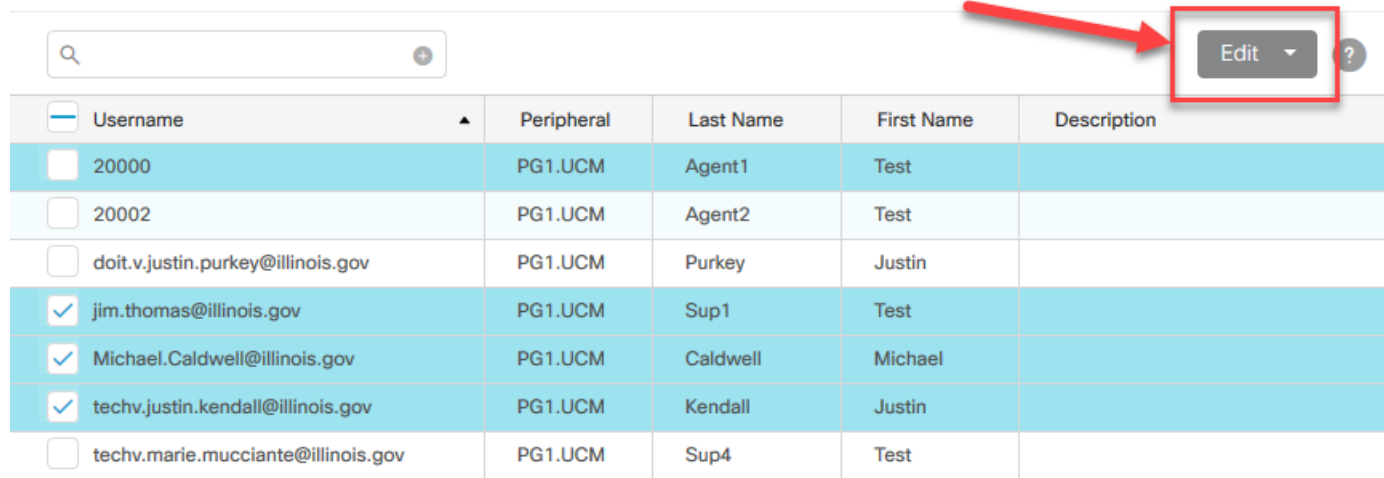


  3. Select the checkbox on the left side of each of the agents to be modified.

4. After selecting the agents, click the "Edit" button on the right side of the screen



5. In the dropdown, select "Skill Groups"
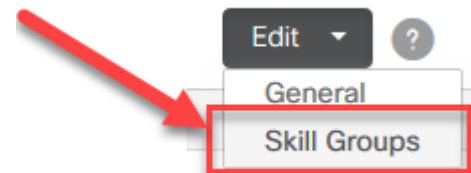
# SKILL GROUP ASSIGNMENT – MULTIPLE AGENT SG SELECTION

6. In the dialog, select the plus or X icon as appropriate for the changes to be made

# SKILL GROUP ASSIGNMENT – MULTIPLE AGENT FINAL

7. For each change indicated, you'll see:

- An "undo" arrow in the action column that you can press to undo your selected change

- If you removed a skill group, you'll see the name of the Skill Group crossed out

- A summary at the bottom indicating what will be added or removed.
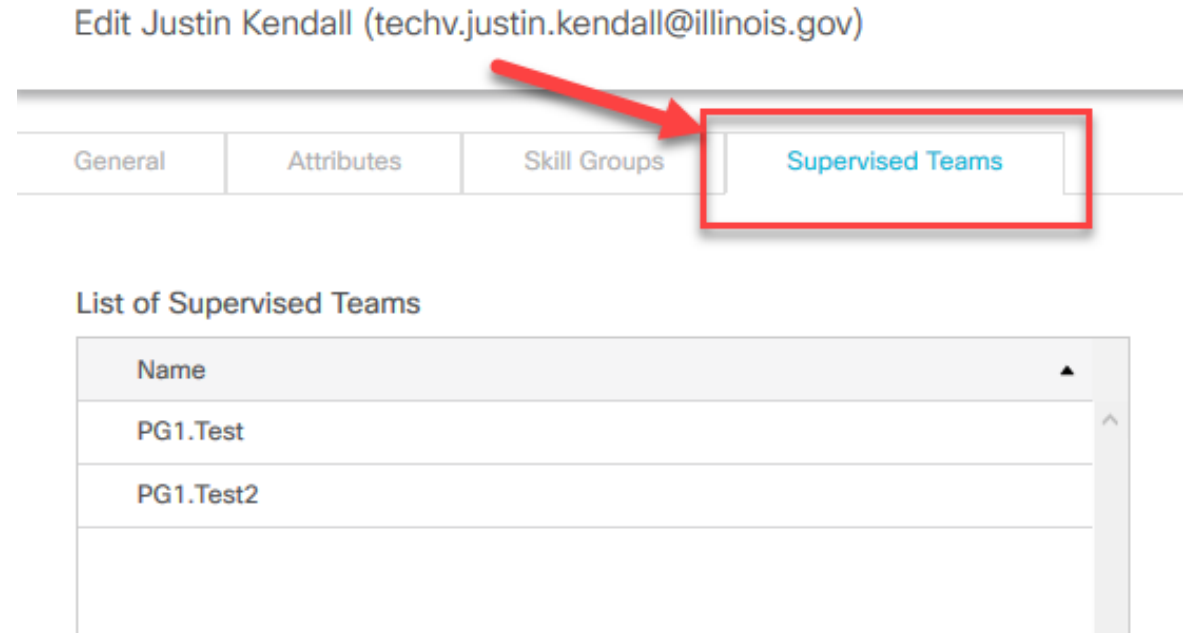
8. When finished, click "Save"

# SUPERVISOR SETTINGS

# SUPERVISED TEAMS

From the **Supervised Teams** tab, you can see:

- List of teams supervised by the supervisor

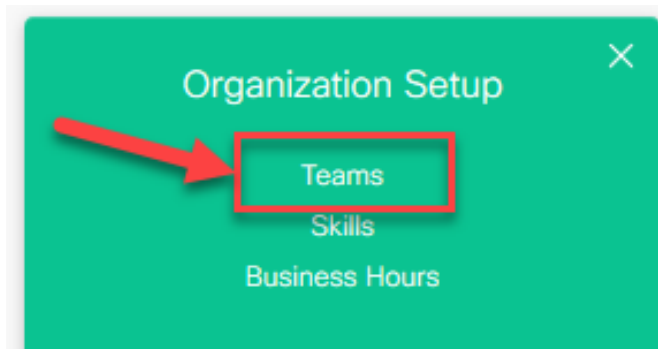**This page is read only and cannot be edited**

# TEAM SETTINGS

# FIND TEAMS

To find teams:

- Select **Organization Setup → Teams**

# TEAM SETTINGS

To view team settings:

1. Search for or scroll to the Team you would like to view
2. Click on the team in the list

# TEAM SETTINGS

Team Settings are broken down into three tabs:

- **Basic Details**
  - Team Name
  - Description
- **Team Members**
  - Contains the list of agents that have been assigned to the team
- **Supervisors**
  - Contains the list of agents that have been configured to supervise the team

# TEAM SETTINGS - MEMBERS TAB

- Read-only list of agents that are members of the team

View PG1.Test

| Basic Details | Team Members | Supervisors |
|---|---|---|

**List of Agents**

| Agent |
|---|
| Justin Purkey (doit.v.justin.purkey@illinois.gov) |
| Test Agent1 (20000) |

# TEAM SETTINGS - SUPERVISORS TAB

- Read-only list of agents that supervise the team

View PG1.Test

| Basic Details | Team Members | Supervisors |
|---|---|---|

**List of Supervisors**

| Supervisor |
|---|
| Justin Kendall (techv.justin.kendall@illinois.gov) |
| Justin Purkey (doit.v.justin.purkey@illinois.gov) |