

ECS Setup: Staffing - Agents Tab

Staffing: Agents Tab

The Agents Tab shows the list of all agents and supervisors that are part of the contact center. From this view, Admins have the ability to drill down and make edits to specific agent profiles, add a new agent/supervisor profile and make bulk updates to all agents.

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- [How to Make Bulk Changes to Agents](#)
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Main View



1. **Filter Agents by Criteria** – Name, Extension, End Point, Default Load Allowance, Available Load Allowances, Private Telephones, HPBX User, Email Address, or Skills
2. **Search Filter** – Enter in search based on filter drop down
3. **Reset Agents Password** – Reset agents password back to the default password or send an email to the agent to reset themselves.
4. **Bulk Import/Export of Agents** – For more information on this feature [click here](#)
5. **New/Delete** – Add or delete an agent profile
6. **Agent Name**
7. **Agent extension** – By default, every agent will get an extension that is specific to ECS regardless of whether or not you have purchased an Overlay or Unified ECS solution. If utilizing the ECS Unified solution, the agent will use their HPBX extension provided to them by their project manager to extension dial between agents, supervisor and non-contact center users. The extension is only used by the "Assign Agent" Activity in an Interaction Handling Flow which sends an interaction to the agent by translating that extension to the physical End Point of that user. Agent extensions default to 3 digits and be modified to any number of digits desired. Note: extensions cannot be dialed by other ECS users.
8. **Agent Skill Profile** – Agent Skill Profiles are created and assigned to agents in the Agent Characteristics tab. Each profile is made up of a set of skills and level of proficiency that is assigned to each agent. By default every agent is assigned a profile with language skills of Spanish and/or English. These profiles will only be utilized if using skill based routing.
 - a. For example, a customer needs a skilling profile in in Billing and Product. A profile called Product will be created and the product skill assigned to that profile. The skill level will be marked high and then assigned to the appropriate agents. Then in the main agents tab view, Product would appear as the agents skill profile. This shows that any calls coming into a Business Process tagged with a Product demand, the system will look for an agent skilled in that demand, in this case Product.
9. **Load Allowance Profile** – Load Allowance profiles are created and assigned to agents in the Agent Characteristics tab. This profile indicates the type of Load Allowance currently assigned and active for each agent. The load allowance is what dictates the total number and type of interactions an agent can handle at one time.

Drilling Down and Editing an Agent's profile

New Channel | New Business Process | New Agent | Bulk Operations

Staffing > Agent 10

Account Name AIRELAB\WebC_Agent10	Extension 310	Agent Availability Type Regular Agent														
Default Phone Internal Phone	Auto Answer Interaction delay (Telephony only) 0	Default Load Allowance Basic														
Available Load Allowances ☒ Advanced ☒ Basic ☐ Email, Chat and Telephony ☐ External only ☐ Liz Test ☐ One Interaction ☒ One voice only	Hang Up Line after each Call * ☒ Internal Phone ☒ Private Phone ☒ HPBX Phone	Auto Answer By Media Type ☐ Telephony ☐ Email ☐ Chat ☐ Fax ☐ SMS														
Private Telephones ☒ BlackHole310	HPBX User ***	HPBX Registrar User														
HPBX Registrar Password	HPBX User Address	End Point 310														
Email Address	Change Extension Allowed	Delegate To Supervisor Allowed														
CRM Enabled																
Profiles ☒ Agent Profile 1 ☒ VIP	Skills Visible: 21 Total: 21 <table border="1"> <thead> <tr> <th>Selected</th> <th>Not Selected</th> </tr> </thead> <tbody> <tr> <td>Hebrew</td> <td>English</td> </tr> <tr> <td>Russian</td> <td>Handle SMS</td> </tr> <tr> <td>Spanish</td> <td>VIP</td> </tr> <tr> <td>Customer Grade</td> <td></td> </tr> <tr> <td>Professional Level</td> <td></td> </tr> <tr> <td>Technical Level</td> <td></td> </tr> </tbody> </table>		Selected	Not Selected	Hebrew	English	Russian	Handle SMS	Spanish	VIP	Customer Grade		Professional Level		Technical Level	
Selected	Not Selected															
Hebrew	English															
Russian	Handle SMS															
Spanish	VIP															
Customer Grade																
Professional Level																
Technical Level																

Profiles

☒ Agent Profile 1

Skills Visible: 0 Total: 0

Selected	Not Selected
	English
	Hebrew
	Russian
	Spanish
	Customer Grade
	Professional Level
	Technical Level
	Sales Skills
	Customer Preservation
	Handle Callback
	Handle Preview Plus Dialer
	Handle Predictive Dialer
	Handle Preview Dialer
	Handle Power Dialer

- Account Name** – Agent's Username. They will use this to log into the Agent client. Not editable.
- Extension** – The extension assigned to every agent and supervisor by default upon creation of the agent profile. Utilized only in an Overlay solution.
- Agent Availability Type** – By default all agents are Regular Agents, but can also be an Office Agent. The difference between the Regular and Office Agent license types are that the Office agents will automatically resume a Ready state after the "No Answer" suspend time if the agent went into a No Answer state after a missed call. Regular Agents will remain in the No Answer state until manually changed back to a Ready or Break state. With the Regular Agent license, Supervisors will be able to track and see in real time which agents are missing calls and for how long they remain in that state.
- Default Phone** – the type of phone utilized by the agent.
 - Internal Phone – the internal phone is turned on by default and utilized in an Overlay scenario. This will utilize the ECS soft phone only.
 - Private Phone – this allows for the agent to send calls to a different phone number. The Private Telephone Box will need a number added into it for the Private Phone option to work.
 - Example – Agents will be working from home and want all calls to go to their cell phones. The Private phone option will be selected and the agents telephone number will need to be added into the Private Telephone box.
 - HPBX Phone – this will utilize the ECS Unified solution. It will allow for the agents to make/take calls on their handset or the ECS Soft phone. The HPBX Terminal must have the users Broadsoft UserID in place. This will be implemented by a Project Manager.

5. **Auto Answer Interaction delay (Telephony only)** – a configurable delay can be added to allow time for the Agent's workstation to launch the business application "screen pop" to ensure synchronized delivery to the Agent.
6. **Default Load Allowance** – shows the current default load allowance being utilized by the agent when handling interactions. When selecting the drop down, it will show all load allowance profiles assigned to the agent.
7. **Available Load Allowances** – indicates all the load allowance profiles created for the contact center. Which ever ones are checked off indicates the profiles that have been assigned to the agent. This list is what the default load allowance drop down pulls from.
8. **Hangup Line after each Call** – Not editable.
9. **Auto Answer by Media Type** - manage the media types the agent application will auto answer for the agent on incoming interactions. If only telephony is selected, the agent application will only auto answer Telephony incoming interactions and email, chat and fax will need to be manually answered by the agent.
10. **Private Telephones** – telephone number needed when utilizing Private Phone as the default phone type for the agent. The phone number needs to be a ten digit telephone number.
11. **HPBX Terminal** – utilized for the ECS Unified solution. This is the users Broadsoft UserID. Created and implemented by an Evolve IP Project Manager.
12. **End Point** – the default extension assigned to the agent.
13. **Email Address**
14. **Change Extension** – gives the agent the ability to change their extension or endpoint where they wish to receive calls.
 - a. Example – they are currently setup to receive calls through their Internal phone. However, the agent needs to work from home the rest of the day. If Change Extension is enabled, they can change their extension/DID from the Agent client and utilize either the Private Phone number setup or input a different number ad hoc.
15. **Delegate to Supervisor** – allows agents to delegate an interaction to a supervisor. When the interaction is delegated it will show up in the Supervisor client, indicating they have a new delegation. An agent might want to delegate an interaction to a supervisor when follow up information is needed or the customer explicitly requests a callback from a Supervisor.
16. **Always Recorded** – this will apply only to Overlay solutions. This will be enabled if the current ECS setup is an overlay solution and the agents are to be setup with call recording. ECS has an entirely different call recording platform for the ECS Unified solution.
17. **CRM** – contact manager functionality that allows agents to manage contact information and provides a full detail contact history of all the touches the customer has had with the organization.
18. **Profiles** – a list of all skill profiles created in the Agent Characteristic tab and available to assign to the agent. An agent must have an Agent Profile assigned in order to use the Agent Monitoring view within the Agent client.
19. **Skills** – all available skills that can be assigned to the agent, without a skill profile.

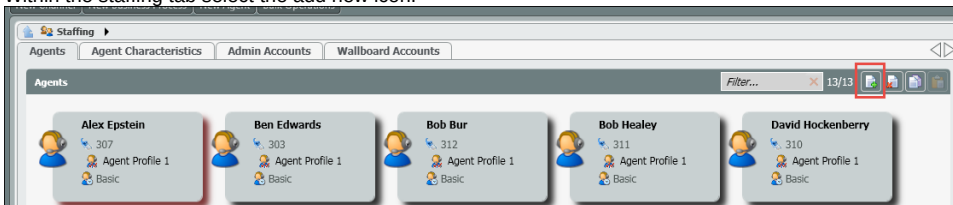
The following options within the Agent profile can be edited by a Supervisor or Admin:

1. Default Phone
2. Auto Answer Interaction
3. Default Load Allowance
4. Private Telephone – if applicable
5. Available Load Allowances
6. Change Extension
7. Delegate to Supervisor
8. CRM
9. Profiles
10. Skills

Adding a New Agent or Supervisor

When adding a new agent or supervisor it is not adding an additional concurrent license to the enterprise. It is creating an agent/supervisor profile that will provide login credentials to utilize the current concurrent license count within the enterprise. **To learn more about adding or editing agent profiles using the bulk import/export feature, [click here](#).**

1. Within the staffing tab select the add new icon.



2. A new agent pop will open to fill in the new Agents information. The following information is needed to create the agents profile:
 - a. **Name of the agent**
 - b. **Load Allowance Profile** – select the appropriate load allowance from the drop down. The load allowance profiles are created in the Agent Characteristics tab. The load allowance dictates the number and type of interactions an agent can handle at one time.
 - c. **Agent Availability Type** – this should default to Regular Agent and should not be changed.
 - d. **Profiles** – select the appropriate skill profile for the agent. The (skill) profiles are created in the Agent Characteristics tab. This dictates the type of calls/skills the agent are able to handle.
 - e. **Can change extension** – by default this is enabled. If you do not want the agent to be able to change their extension you will disable this.
 - f. **Can Delegate to Supervisor** – by default this is enabled. This allows agents to delegate interactions to their supervisors.
 - g. **Always Recorded** – by default this is disabled. This needs to remain disabled if implementing a ECS Unified solution.
 - h. **CRM** – by default this is disabled. Enabling this feature allows the agent to have access to the contact management system and view the detailed contact history of all the touches the customer has had with the organization.
 - i. **Default Phone** – by default this is set to Internal phone. If utilizing the ECS Overlay solution, the Internal phone should remain. If utilizing the ECS Unified solution, the default phone should be changed to HPBX.
 - j. **Private Telephone** – this will only need to be filled in, if the default phone is set to private phone.

- k. **Business Processes** – select and assign the Business Process the agent should be joined to
- l. **Supervised Business Processes** – if creating a supervisor profile, select and assign the Business Processes the supervisor should be managing. This box should only be utilized when creating a supervisor profile.
- m. Select "OK" when complete

The 'New Agent' form displays the following fields and options:

- Name:** Text input field.
- Address:** Text input field.
- Load Administrator:** Dropdown menu with 'Basic' selected.
- Agent Availability Type:** Dropdown menu with 'Regular Agent' selected.
- Profile:** Section with a checked option 'Agent Profile 1'.
- Can Change Extension:** Toggle switch set to 'Allowed'.
- Can Delegate To Supervisor:** Toggle switch set to 'Allowed'.
- Always Recorded:** Toggle switch.

Buttons at the bottom: OK, Cancel.

The 'New Agent' form displays the following fields and options:

- Always Recorded:** Radio button set to 'No'.
- CRM:** Radio button set to 'Disabled'.
- Default Phone:** Text input field.
- Internal Phone:** Text input field.
- Private Telephone:** Text input field.
- Business Processes:**
 - Selected:**
 - Customer Service
 - Billing
 - Not Selected:**
 - Dialer
 - Dialer DMC
 - Operator
 - Sales
 - Technical Support
- Supervised Business Processes:** Text input field.

Buttons at the bottom: OK, Cancel.

3. The new agent will appear on the Agent main screen.

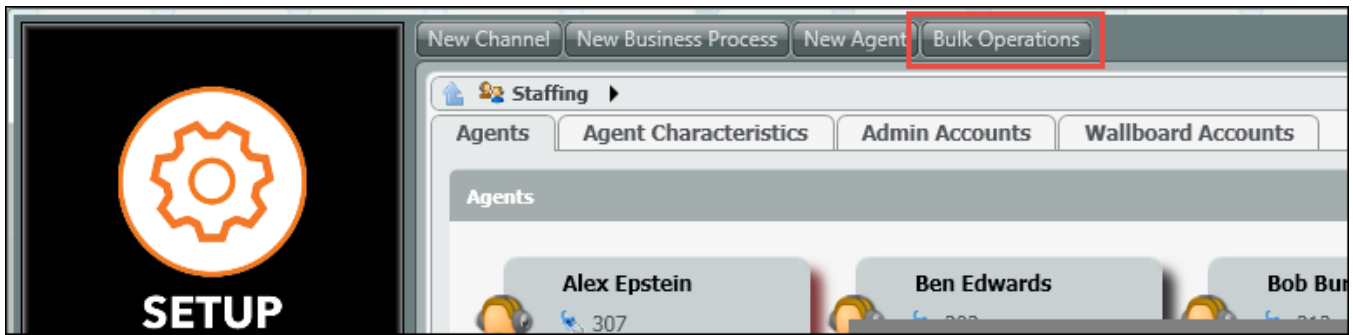
4. If any additional edits are needed, drill down into the agents profile. Note*- if utilizing the HPBX phone, within the agents profile, the HPBX terminal will need to be filled in. This user information can be provided by support or the project manager.

How to Make Bulk Changes to Agents

The following options are available to make Bulk Updates (changes that affect all agents):

- All Agents Always Recorded – Turn Call Recording on or off for all agents
 - Set – Turns the feature on
 - Un Set – Turns the feature off
- All Agents CRM – Turn CRM Management on or off for all agents
 - Set – Turns the feature on
 - Un Set – Turns the feature off
- All Agents Can Delegate to SV (Supervisor) – Turn the ability to delegate interactions to supervisors on or off for all agents
 - Set – Turns the feature on
 - Un Set – Turns the feature off
- All Agents Auto Answer Interaction – Turn Auto Answer on or off for all agents
 - Set – Turns the feature on
 - Un Set – Turns the feature off

1. Select the Bulk Operations Icon at the top of the Setup Client.



2. The Bulk Operations Pop Up Box will open. Select the options you wish to make changes to – “Set” to turn for all agents and “Un Set” to turn off for all agents. Any option you do not wish to change will show as Not Changed in the drop down. Select OK to save the changes.

A screenshot of a 'Bulk Operations' pop-up window. The window has a title bar with 'Bulk Operations' and a close button. Inside, there are several sections, each with a title and a dropdown menu. The sections are: 'All Agents CRM' (Set), 'All Agents Can Delegate To SV' (Set), 'All Agents Auto Answer Interaction *' (Not Changed), 'All Agents Hang Up Line After Each Call Internal' (Not Changed), 'All Agents Hang Up Line After Each Call Private' (Not Changed), 'All Agents Hang Up Line After Each Call HPBX' (Not Changed), and 'All Agents Can Change Extension' (Set). At the bottom right are 'OK' and 'Cancel' buttons.

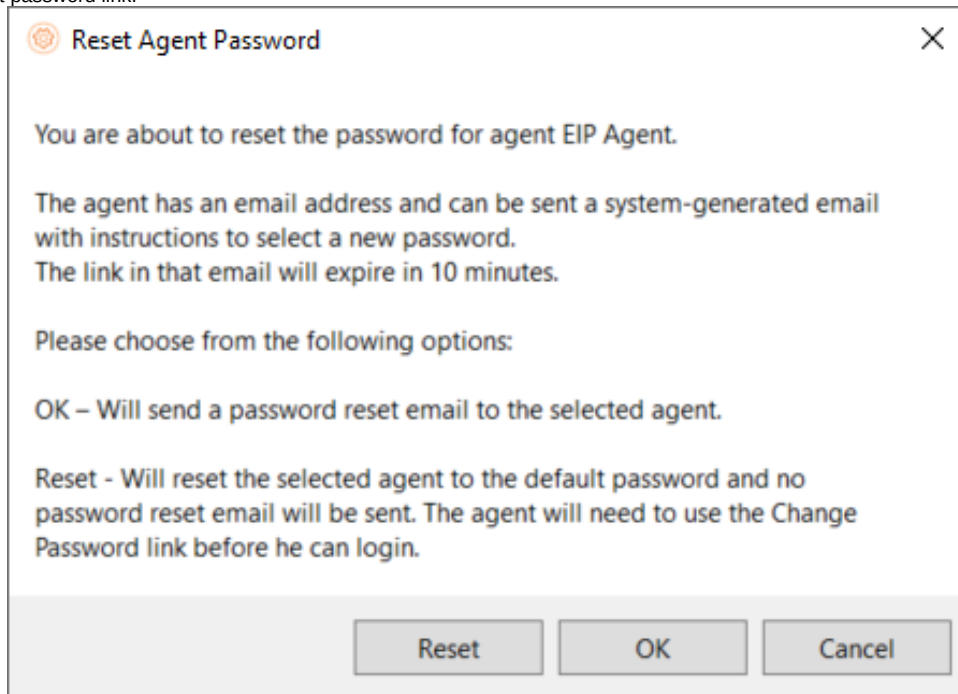
Resetting an Agents Password

1. Select the agent(s) you wish to reset their password.



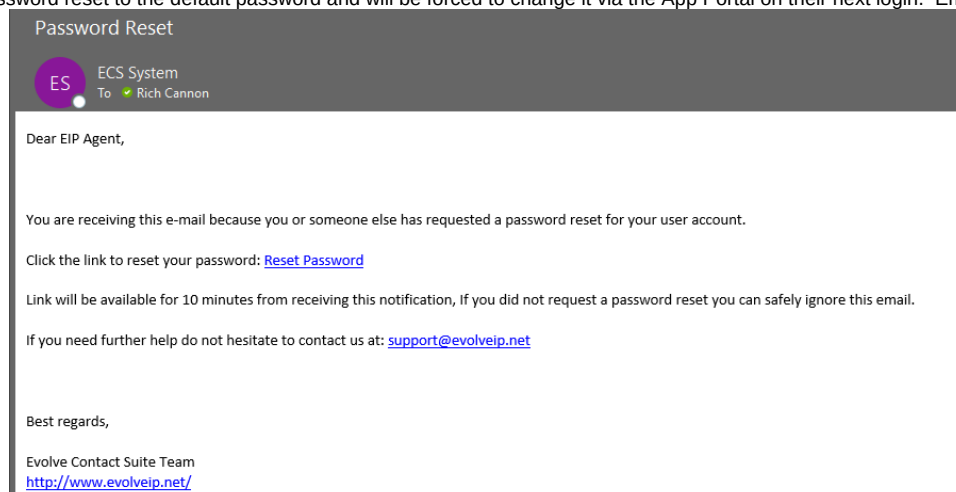
a.

2. Click on the Reset Agents Password icon
3. A pop-up window will open, providing the number of agents you've selected as well as any agents that have a valid email address stored to send the reset password link.



a.

4. If the list has a mixture of agents with and without valid email addresses two reset options are available:
 - a. OK (Send Emails) - this will send the reset password email to all users with valid email addresses. The agent must click on the reset link in the email within 10 minutes of being sent or it will expire and need to be resent again. Users without valid email addresses will have their password reset to the default password and will be forced to change it via the App Portal on their next login. Email Example:



i.

- b. Reset All - this will reset all selected agents (regardless of valid email address) to the default password and they will be forced to change it via the App Portal on their next login.
5. A confirmation window will open, select OK
6. To add an email address to an agent for the password reset, two options are available:
 - a. Drill down into an individual agents profile and add the email address
 - b. Utilizing the export/import agents function to edit multiple agents email addresses
7. [Click here](#) for information about the ECS Password Policy

