

# User Profiles

Users profiles can be used, to change agents quickly from one set of tasks to another. This is of particular use, when moving agents to a different task involves lots of changes to the group status and skill of agents in several groups.

To see the configured user profiles, use the menu item **ACD - User Profiles**. You will see a table like the following:

The **New** function is used to create a new profile, the **Copy** function copies an existing profile including all settings and rules to a new profile.

The profile settings are divided up into 4 pages:

- Rules
- Time Plan
- Agents
- Master Data

## Master Data



|                   |  |
|-------------------|--|
| Name              | The name of the user profile   |
| Short name        | The short name of the user profile.  |
| Abbreviation      | Two letters or digits which are used in the quick status buttons displayed to agents.  |
| Active            | If the profile is active. Not active profiles are not available for selection by users, and are not applied by the automatic scheduling mechanism.   |
| Visible to Agents | If the profile is visible to agents. Invisible profiles can only be activated by the administrator, or the scheduling mechanism.   |
| Login Profile     | Login profiles are applied when agents log in, or are currently logged in. The system remembers the last activated profile, even if the user is not logged in at the time it is applied. This profile will then be applied when the agent logs in, if it is configured as a login profile. Logout profiles are only applied when agents are actually logged into system, and are never applied later or when logging in. |
| Font Colour       | Choose a font colour for display purposes.   |
| Background Colour | Choose a background colour for display purposes.   |

## Agents

This page displays which agents are associated with the profile. Only agents that are configured here, can see and use the profile. The same applies to the automatic scheduling mechanism.

## Rules

Rules are the heart of the profile, and define what actions are executed when the profile is applied.



The list displays active rules with a green dot , and not active rules with a red dot . Rules can be activated and deactivated in the list by clicking on the dot.

The following settings apply to rules:

|                     |  |
|---------------------|--|
| Execution Order     | The rules are applied in execution order. The functions <b>Up</b> , <b>Down</b> , <b>Insert at Start</b> and <b>Append at End</b> are used to determine the execution order.   |
| Active              | Only active rules are applied  |
| Scope               | <p>Rules are applied to agents which fit the execution scope:</p> <ul style="list-style-type: none"> <li>• All Members of this User Profile<br/>The rule is applied to all agents configured on the <b>Agents</b> page</li> <li>• Members of this User Profile who are members of the following ACD group<br/>The rule is applied to agents configured on the <b>Agents</b> page who are members of the given ACD group</li> <li>• Members of this User Profile who are permanent members of the following ACD group<br/>The rule is applied to agents configured on the <b>Agents</b> page who are permanent members of the given ACD group</li> <li>• Members of this User Profile who are reserve members of the following ACD group<br/>The rule is applied to agents configured on the <b>Agents</b> page who are reserve members of the given ACD group</li> </ul> |
| ACD Group           | The ACD Group, for the rule Scope and Group Status.  |
| Logged-In           | <ul style="list-style-type: none"> <li>• Yes<br/>The rule is only applied, when the agent is in a status configured with the flag "Logged-In".</li> <li>• No<br/>The rule is only applied, when the agent is <b>not</b> in a status configured with the flag "Logged-In".</li> <li>• Don't care<br/>The "Logged-in" status of the agent does not matter.</li> </ul>  |
| Present             | As Logged-In, but for the flag "Present".  |
| Holidays            | As Logged-In, but for the flag "Holidays".   |
| Pause               | As Logged-In, but for the flag "Pause".  |
| Manual Post Call    | As Logged-In, but for the flag "Manual Post Call".   |
| Automatic Post Call | As Logged-In, but for automatic post call.   |
| Rule Description    | <ul style="list-style-type: none"> <li>• Change Agent Status<br/>Agent status is changed to the configured value.</li> <li>• Change Group Status<br/>The group status is changed to the configured value.</li> <li>• Change Group Status in ALL Groups Except Groups Referenced Explicitely by this Profile<br/>When selecting this rule type, a sub-window opens and you have the possibility to change the respective group status (logged off or logged on).</li> </ul>   |
| Agent Status        | The agent status to use.   |
| Group Status        | The group status to use.   |
| Skill level         | The skill value to set in the group, or (no change) if the value should not be changed.  |

## Time Plan

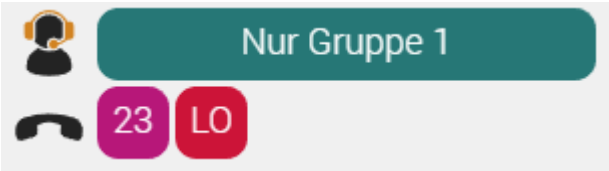
The Time Plan can only be activated by the daemon `UsersProfilesTimePlanExecutor`. If it is not active, please consult your service advisor regarding activation.

The time plan defines, when a profile is automatically applied by the system. The profile is applied usually 0 to 5 seconds from the defined time. Multiple entries can be configured, active entries are shown with a green dot  , not active entries with a red dot  . Entries can be activated and deactivated by clicking on the dot.

|                          |   |
|--------------------------|---|
| Active                   | Only active time plan entries are applied.  |
| Execution Time           | The time at which the profile should be applied.  |
| Weekdays                 | The profile is applied on the selected days of the week.                                |
| Holiday List             | The holiday list is used in conjunction with the next two settings.                     |
| Execute when is holiday  | The time plan entry is executed when it is a holiday according to the holiday list.     |
| Execute when not holiday | The time plan entry is executed when it is not a holiday according to the holiday list. |

### Change Profile

Agents can change profiles by clicking on the required profile in the quick buttons in the header of the ACD client. The current or last remembered profile is also shown above the quick buttons, can be applied again by clicking on it.



Administrators can apply profiles from the profiles list using the **Execute** function.