Editing Users

Once a user has been created, you can edit further settings. To change settings for a user at a later time, use the function **User Data - Users** and click on **Edit** in the table row of the user you wish to edit.

Use the tabs to select screens with different sets of data and functions.

User

This page contains in the main fields which were required when [Creating Users](). Here you can modify the data used when the user was created.

First Name	User First Name
Surname	Surname of User
User UID	A representative account name, for example *Service 1*, *Smith* or *Supervisor Accounts*. This is also used as the login name for the user.
Nick Name	Nick Name
Security Group	The rights assigned to the account. This determines what functions will be accessible by the account. By default *User* is selected. You can, however, select another group if the user is to be given different access rights.
LDAP user name	If you indicate an equivalent configured LDAP server here, all users with an LDAP account can be authenticated by the server when they login to the portal or use the SOAP interface. For further information, visit this page
Language for Announcements	The preferred language of the user for the telephone user interface. This is relevant for example when the user logs in by telephone, or for emails generated by the system.
Language for Texts and E-Mails	The preferred language of the user for written notifications, for example for emails generated by the system.
IP Address Mask	Here you can optionally enter an IP address range from which the user must login. Example notation: 123.123.123.0/24 In this case the user must login from an IP address 123.123.123.0 to 123.123.123.225. The so called CIDR notation is used to specify the mask.
Active	If you deactivate this option, the user is no longer capable of logging in. In this way you can deactivate users without deleting their accounts.
Pager Rows	The number of rows shown in tables shown in the application for this user. This number can be changed by the user themselves using the plus and minus buttons in any table.
Supervisor Service Level (s)	Here you can set which default value for the header in the supervisor should be used for calculating the service level. This value does not replace the In Service setting of the respective groups but affects the Answered in X s column.
Supervisor Short Hangups (s)	Here you can set which default value for the header area in the Supervisor should be used for the calculation of the Short Hangups table column.
Supervisor Service Quota (%)	Here you can set which default value for the header area in the supervisor should be used for the calculation of the table column X% answered in (s).
Supervisor Start Time (std: min)	Here you can adjust the date of data to be aggregated shown in the table of the Supervisor (field "Statistics since"). The setting which you select here, will become the default setting which the system will use after the login. The time can be changed during the operation. The default setting is 00:00.
Supervisor Graph Interval (min)	Here you can set which default value for the header area in the supervisor should be used to display the graphic tiles in the wallboard.

Number of Wallboard Collumns	Number of groups that are displayed next to each other on the wallboard.
Show Current Calls in Wallboard	Set this option, if a table of the current calls should be displayed at the end of the Supervisor Wallboard. This setting option is only available if it was configured for you.
Agent Internal Calls with Active Tel Number	For more information, please visit: User Master Data
PBX Users Internal Calls with Active Tel Number	For more information, please visit: User Master Data
Number Internal Calls with Active Tel Number	For more information, please visit: User Master Data
Password	Change the password in a popup window
PIN	Change the PIN in a popup window

Communications

This tab shows the telephone numbers and email address of the account.

When used in the ACD each telephone number is assigned an ordinal number. This is shown below the input fields. Example:

When the user logs in via telephone or changes the telephone number in the toolbar, this ordinal number is used.

An email address is important for the delivery of voice messages. Several email addresses can be added, separated by a comma.

Service Numbers

Here you can assign service numbers to the user account. Only assigned service numbers can be edited and viewed by accounts on the user level of the system. Administrators are given access to all service numbers within the client account.

To add another service number on **Add** in the toolbar. In the table of service numbers select **Add** in the **Action** column. You are returned to the service numbers tab in the user, where you can see the added number(s).

Reports

Here you can assign predefined reports to a user account. Users are given access to the reports specified here, and also to the reports which are assigned to their accounts by means of the security group they are assigned to.

To add another report use **Add** in the toolbar. In the table of reports select **Add** in the **Action** column.

ACD Options

This tab determines what ACD options are assigned to the user account.

Status-based Routing	If this option is selected, • when changing to a status, with the status-based routing switched on, the routing of the user of the device*Office 1* is switched on. • when changing to a status, with the status-based routing switched off the routing of the user of the device*Office 1* is switched off. The status-based routing requires the operation of a PXB connector.
Destination number for status based call forwarding	If a number is registered here, it will be used as destination for the status-based routing when switched on. If this filed is empty, the destination from the Client Master Data is used.
Free-Seating	Activate this option to give users the capability to login to the ACD using a flexible phone number. Agents can then work from any phone number they wish.
Use Free-Seating Whitelist	If the user is configured to use free-seating, then they can login to the ACD from any telephone number. If this option is also selected, then the choice of telephone number is restricted to those contained in the free seating whitelist.
Automatic Call Answer	If the system uses a PBX connector which supports the answer function, then the user can be enabled to use this function with this setting. Note: this only works for extensions which are monitored by the PBX connector.
Automatic Call Greeting	By setting the checkmark, the announcement call greeting will be activated.
User Greeting Prompt	If the option automatic call greeting is configured, the prompt file will automatically be played by the system when the agent receives incoming calls.
Multichannel Agent	Activate this option, if the agent is capable of answering more than one call or calls from several service numbers in parallel. This can be for example used to incorporate locations which have a separate ACD in the system simply by configuring the number of parallel calls the location can take as an agent.
Maximum Number of Parallel Calls	Here you determine how many calls the multichannel agent will receive in parallel.
Ignore Telephone Status	The ACD will try to distribute calls to the agent, event if their telephone status is *Busy*. This option can be useful if an agent should be capable of handling any number of calls in parallel. Note, that this setting can lead to side effects. Example: If skill based routing is setup for the group, and this agent is configured with the highest skill in the group, then he or she will receive all calls to the group.
Call Recording every x calls	If activated, every x call of an agent in a group in which the Call recording every x calls is set, will be recorded. 0 = deactivated Note: if the agent also receives calls from other groups in which the option is switched off, these calls will also be included in the value of x.
Maximum Call Recording each day	If the *Call Recording every x calls* is activated, here you can define the maximum number of calls to be initiated per agent per day. When this value is has been reached, no further call recordings will be proceeded. If no value is defined here, the value "infinite" is applied.
Agent Status Change After "Logout" in web	Checking the box activates the agent status, which is stored in the field **Agent status after "Logout" in web.**
Agent status after "Logout" in web	This agent status is selected when an agent logs out of the portal via the "Logout" button in the browser.
Maximum Missed Calls - Busy	Missed Calls are those which were distributed to the agent, but were not answered. Missed Calls - Busy are those which were distributed to the agent, but were not answered because the agent was busy (and the system did not know about this beforehand). If this counter is exceeded, the agent will be logged off. -1 = deactivated. 0 means no missed calls, i.e. agents are immediately logged off when they miss a single call.
Agent Status after Logout - (Busy)	Choose here which agent status the agent should adopt, as soon as Autologout occurs because of *Busy*.

Maximum Number of Missed Calls - No Answer	Missed Calls - No Answer are those which were distributed to the agent, but were not answered, because the agent did not answer the phone within the set maximum ring time. If this counter is exceeded, the agent will be logged off. -1 = deactivated. 0 means no missed calls, i.e. agents are immediately logged off when they miss a single call.
Agent Status after Logout - (No Answer)	Choose here which agent status the agent should adopt, as soon as Autologout occurs because of *Busy*.
Maximum Missed Calls - Rejected	Missed Calls (refused) are those which were distributed to the agent, but were refused manually by rejection at the extension or Hang up in Agent Home. If this counter is exceeded, the agent will be logged off. -1 = deactivated. 0 = agents are immediately logged off when they refuse a single call.
Agent Status after Logout - (Rejected)	Choose here which agent status the agent should adopt, as soon as Autologout occurs because of *Refused*.
Maximum Missed Calls - Total	This counter set the maximum number of missed calls in total. This counter does not take into account why the call was lost. -1 = deactivated. 0 means no missed calls, i.e. agents are immediately logged off when they miss a single call.
Agent Status after Logout - All	Choose here which agent status the agent should adopt, as soon as Autologout occurs because of *Total*.
Notify Auto-logout by Email	Agents receive an email when they are automatically logged off the system due to a missed call.
Daily Autologout Active	Automatic daily logout at a particular time of day is deactivated for this agent.
Voice Mail via Web Interface	Activate this option if the user should receive voice mails via the web interface (otherwise they will be delivered by email).
Fax via Web Interface	Activate this option if the user should receive faxes via the web interface (otherwise they will be delivered by email).
SMS via Web Interface	Activate this option if the user should receive SMS via the web interface (otherwise they will be delivered by email).
Callback via Web Interface	Activate this option if the user should receive callback requests via the web interface (otherwise they will be delivered by email).
Email via Web Interface	Activate this option if the user should receive e-mails via the web interface (otherwise they will be delivered by email). Note: Therefore a corresponding Inbox must be configured.

Groups

The group membership of an agent defines in which theme groups the agent is working in the call center. A group is a destination for calls, which are routed to the platform via a configured service number.

If the users are to use the ACD, then they need to be assigned to groups. Note, that the groups will need to have been created beforehand. This is explained in the ACD chapter. You can associate users with more than one group. This means, that each user / agent can be made available for different types of call.

To associate a user with a group, click on **Add**.

Provide the following information in the form:

Group Name	The name of an existing ACD group

Mapping Type	You can choose from the following mapping types:
	Read only — Users do not take calls for the group. They can only view the group.
	Read Only (Invisible) - the user does not take calls and is invisible for other users (agents and supervisors). I.e. this agent is not counted or listed in Agent Home and Supervisor and also not visible in any statistics. If you choose this option, the agent should not be logged into the system. If the agent is logged in, he or she should logout and log back into the system.
	Permanent — users are automatically logged into the group when logging into the ACD.
	Reserve — users are not automatically logged into the group when logging into the ACD. They can, however, login to the group as required.
Supervisor	The user is a supervisor of the ACD group. Supervisors have the capability of using additional functions, such as logging agents in and out of the ACD.
Administrator	The user has administrator rights in the ACD group ACD group administrators can manage the ACD group, i.e. change the parameters and settings of the group.
Skill	On a scale of 0 to 100 (maximum) define what (general) skill the user has in this group. This setting is relevant, if calls are distributed to the group using a skill based algorithm.
Logout not possible	Activate this option if the user should not be allowed to log out of the assigned ACD groups. Users can still log off the ACD completely. As long as they remain logged into the system they remain logged into the selected ACD groups.
Automatic Daily Group Logout	The user will be logged out at a pre-determined time every day. This function and time of execution are configured in the ACD group. If a time is not configured, then no automatic logout will be performed. Agents who have this option set, will not be logged off automatically when the procedure is performed. This function can thereby be deactivated for selected users.
Automatic Logout on Missed Calls	If this option is selected, agents are logged off when the number of missed calls (due to busy or no answer) exceeds the configured number of maximum missed calls. The configuration of the parameters for missed calls is on the **ACD Options** tab.

As additional information is displayed:

Group assignment total	*P* - User is assigned to one or more ACD Groups *permanent*.
	R - User is assigned to one or more ACD Groups as *reserve*.
	L - User is assigned to one or more ACD Groups as *read only*.
	L - User is assigned to one or more ACD Groups as *read only*.
	R - User is assigned to one or more ACD Groups as *reserve*.
	R - User is assigned to one or more ACD Groups as *reserve*.

Existing group assignments of the user are visible in a table. Name, Mapping Type and Skill are shown. The mapping type and skill can be changed using the **Edit** function. Use **Delete** to remove a group assignment.

Skills

Skills can be used to influence the distribution of calls in the ACD. Example: A call, which is received by the system via a specific service number, could be associated with the skill *English*, because this service number corresponds to an English hotline. Doing this means that the call will only be distributed to agents with the corresponding skill. All other agents without this skill will not be taken into consideration when the call is distributed. Further group parameters (timeout etc.) are independent of the associated skills.

Agents can be assigned multiple skills. Note, that the skills will need to have been created beforehand.

To associacte a user with a skill, click on **Add**. Provide the following information in the form:

Skill	The name of the skill
Value	The skill level of the user on a scale of 0 to 100 (maximum).

The existing skill assignments of the user are visible in a table. The skill and skill level can be changed using **Edit**. **Delete** is used to delete the skill assignment from the users account.

Locations

This tab is used to associate the user with locations (for example branch offices of a company). The function of locations is to limit the visibility of agents and statistics. A location supervisor can, for example, only exercise supervisor functions on ACD agents which are associated with that location. A location administrator can only administer agents from the same location. The visibility of data is reduced and the availability of administrator functions is affected by the location assignments of the users account.

To add an existing location use **Add** in the toolbar. Provide the following information:

Location	Location
Administrator	The user has administrator rights for this location
Supervisor	The user has supervisor rights for this location

Use **Save** to confirm and save the data.

Export CSV

Use **Export CSV** to export the users in the system in a CSV file format.

Import

Import can be used to import a list of users to the system. The file must be in CSV format.

When exporting and importing user data via CSV files, the following conventions apply:

- Records in a file are separated by CR + LF (Windows line ending).
- CR + LF within a record is not allowed.
- Fields within records are separated by semicolons.
- A record contains all fields in the defined order (see following table).
- The field descriptions (see table) are not provided.
- Missing fields are not allowed.
- Field contents can be supplied enclosed by inverted commas. In this case the inverted commas are not considered part of the data.
- The detection of duplicates is performed using the *UID* and *AgentNumber* fields. A duplicate is detected when these values are equal. Both fields must be unique for the system to operate correctly. If you activate the option *Overwrite duplicates*, then the data of existing users will be overwritten, if the UID or the *AgentNumber* are equal.

The following fields are specified per record:

Field	Contents
"User"	Fixed text: "User". This identifies the type of the record.
UID	User UID

SecurityGroupsName	Name of the security group of the user
Password	The users password. This field is not provided when an export is performed.
AgentNumber	The agent number of the user.
AgentPIN	The users PIN.
bActive	Whether the user should be activated immediately in the system, *true* or *false*
FirstName	User First Name
Name	User Name
EMail	Email address of the user
DefaultLanguagesID	The ID of the language to be used for standard messages to the user, *1* = English, *2* = German
Tel	Telephone 1
Tel2	Telephone 2
Tel3	Telephone 3
Tel4	Telephone 4
Tel5	Telephone 5
Tel6	Telephone 6
Reserved	Field is reserved, do not use
Reserved	Field is reserved, do not use
IPAddressMask	The IP address mask from which the user is allowed to login. Empty, if no restriction is required.
bTelFlexible	Whether free seating is activated, *true* or *false*
bUseAcdFreeSeatingWhitelist	Whether the free seating whitelist should be used, *true* or *false*
bMultiChannelAgent	Whether the agent is a multichannel agent, *true* or *false*
MaxParallelCalls	The maximum number of parallel calls for a multi channel agent
bCallAlways	Whether the telephone status is ignored for the agent *true* or *false*
MaxMissedCalls	Maximum Number of Missed Calls (total)
MaxMissedCallsNoAnswer	Maximum Number of Missed Calls due to *No Answer* before the agent is logged off the system automatically
MaxMissedCallsBusy	Maximum Number of Missed Calls due to *Busy* before the agent is logged off the system automatically

bNotifyAutoLogout	Notify Autologout by Email
bAutoLogoffDisabled	Whether time activated automatic logout is active for this agent *true* or *false*