

Via Admin Console (Check user does not already exist– select “Users”, then “+Create User” (top right hand corner) (Anything in a blue box needs to be updated/changed/validated)

## Basic information ^

Provide basic information about the user or contact.

* First name	* Last name
<input type="text" value="Gregory"/>	<input type="text" value="Pitcher"/>
* Email	* Username <span>Suggest</span>
<input type="text" value="Gregory.pitcher@nhs.net"/>	<input type="text" value="Gregory.pitcher@nhs.net"/>
* Site	
<input type="text" value="St Martins Campus"/>	
Language ⓘ	Time zone ⓘ
<input type="text" value="English - United Kingdom"/>	<input type="text" value="Europe/London"/>
Contact directory scope User can view all contacts within the company	
<input type="text" value="Company"/>	
Display contact in company directory The user will appear in the company's contact directory	<input checked="" type="checkbox"/>

Turned off for Digital Service Desk

### Additional information

Provide more information if required.

Job title

UMHH Agent/Clinician

Urgent Mental Health Helpline

Personal Address [Edit](#)

For emergencies see the [Emergency Address](#) section

St Martins Campus, Littlebourne Road, Canterbury, CT1 1AZ

Personal contact number

e.g. 123456789

Leave Blank

Input as appropriate, ie (Digital Service Desk Analyst) or(UMHH Agent/Clinician), or (UMHH Agent/Clinician (Temp)) - if for UMHH this should be indicated on the request – see MDS above, if not ask.

If for a temp UMHH user leave as current department, if not use either Urgent Mental Health Helpline, or Digital Services appropriate (full description no abbreviation)

### Services and permissions

Configure and modify license assignments.

Assign a profile policy

UMHH Agent/Clinician

Assign one or more services to user

X Series X8 (VCC)-VCCS0247-04-GB

X Series - X1-VOSVC0216-01GB-GB

Select from:  
UMHH Agent/Clinician, UMHH Administrator or UMHH Supervisor  
Switchboard Manager, Supervisor or Operator as appropriate. or Switchboard Supervisor  
Normal Working Hours (Digital Service Desk)

For a UMMH/DSD user you may only see one licence, once added select the "+" and add an x1 licence. Only UMHH/DSD users need both an x8 & x1 licence.

## Voice basic settings

Define extension number, phone numbers, configure device and manage line key configuration for deskphones.

\* Phone Number

+44 1227 533451 x ▼

\* Extension number

533451

Suggest

Additional Phone Numbers

Please select ▼

Device model

None ▼

Display Inbound Caller ID ⓘ ☒

Preferred codec ⓘ

Toll Quality (G.711U)

Enable call waiting ☐

**Numbers shown are examples** - Input +44 and the first 3 digits of the relevant exchange without a "0" , ie 122 for Canterbury

1. Copy and paste the 6 digit extension from the Phone Number
2. If the above generates an error find another number as described above

**Recommendation**

Once everything is complete on this page it is recommended that you select "Save" at the bottom of the page, it may take a few minutes, but you should see a green splash screen at the top of the page saying settings saved, now just move on to the next section

## Voicemail settings

Define voicemail greetings, voicemail access PIN and voicemail received notification settings.

### External voicemail greeting

Greeting played for people outside the company.

Default audio file will be used [Change](#)

### Voicemail name and last name

When using the default voicemail greeting (i.e. 'you have reached the voicemail of') this message will be used to identify the target. Also used to identify targets in the Auto Attendant's dial by company directory feature.

Default audio file will be used [Change](#)

### Internal voicemail greeting

Greeting played for people inside the company.

Default audio file will be used [Change](#)

#### Notification

Disable notification ▼

#### Email

emma.rowe3@nhs.net

Voicemail access PIN [Reset access PIN](#)

#### Custom 0 Dial out

Callers reaching your voicemail can dial 0 and be redirected to any destination you specify. Update your voicemail greetings to inform your users about this option.




## External Caller ID

Define the External Caller ID that will be displayed on the recipient's device when dialing outside the company.

\* Display name

Emma Rowe

Phone number

+44 1227 533451 

### Block external Caller ID

External calls made by the user will not include any information about the user



## Internal Caller ID

Define the Internal Caller ID that will be displayed on the recipient's device when dialing inside the company.

First name

Emma

Last name

Rowe

Extension number

533451






Remember this number, it will need it on 1 more occasion for 8 x 8 Work & VCC

## Call forwarding rules

Define the call forwarding rules to handle the incoming calls outside of business hours or when the user is not able to address the call.

Showing 5 call forwarding rules

+ Add new rule

<input type="checkbox"/>	Forward all calls to Voicemail	
<input checked="" type="checkbox"/>	When internet connection is down reject calls	
<input checked="" type="checkbox"/>	When user is busy reject calls	
<input checked="" type="checkbox"/>	When user does not answer the call within 45 seconds reject calls	
<input type="checkbox"/>	When user gets a call from a blocked caller reject calls	

Forward rules need to be changed as shown below

**When internet connection is down/When user is busy** – change to “No one and play busy”

**When user does not answer the call within x seconds** – change to 45 seconds and “No one and play busy.”

## Music-on-hold settings

Define the music or marketing message to play while a call is on hold.

### Music-on-hold

Default audio file will be used [Change](#)

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## Call recording settings

Define if recording of calls will be enabled for this user and how will the parties be notified when a recording is in progress.

### Call recording mode

- ☐ Allow user to record calls selectively
- ☒ Record all calls for this user
- ☐ Never record calls for this user

### Recording announcement

Announce to involved parties that the call is being recorded.

Neither 

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## External calling permission

Define the country to which the user will be making calls and if international dialing is enabled.


### Calling country

Sets where calls are dialed from

United Kingdom Numbering Plan 

### External calling plan


Define whether international or domestic calls can be made from this extension

International 

## Emergency address

Define the address that will be transmitted to emergency services when an emergency call is initiated from the deskphone.


Address

Same as the site address 

## Analytics for 8x8 Work

Define access to Analytics for 8x8 Work (analyse talk time, ring time, call detail records and more).

Allowed access level

None, do not allow access to Analytics for 8x8 Work 

## Single Sign-On (SSO)

Define identity integration with SAML 2.0 compliant identity and security systems (Okta, OneLogin, etc.) or Google Apps.

Federation ID (NHS\_Mail)

Federation ID



## Third-party integration

In systems using 3rd party CRM systems, define this user's external identity.

Third party

None

Username

e.g. alan.doe@8x8.com

## Auto Attendant contact directory scope

Configure if this user will be shown or not inside the Auto Attendants directory when using dial by name, dial by extension and search company directory.

Add this user to the Auto Attendant directory

User will appear when using the Auto Attendant "dial by name" option



## Virtual Contact Center (VCC) agent settings

Define the VCC extension, VCC phone number and deskphone settings.

### \* Configure and edit the user's VCC settings

An "Extension Number" is required for all VCC users. "VCC Dedicated extension" can be used to configure an endpoint device that is locked down for VCC use only.

### \* Extension number

[Suggest](#)

6533451

Display VCC contact in company directory

The VCC user will appear in the company's contact directory



Display VCC contact in Auto Attendant directory

The VCC user will appear when using the Auto Attendant "dial by name" option



VCC Dedicated Extension



This is the number, remembered from page 6 – enter it here with a prefix of "6"

### Onboarding information

Indicate whether or not login information should be sent to this user.

Send welcome email ☒

For UMHH and Digital Services – this should be set to on

^

Experience has shown that this option does not always appear

## Configuration Manager for Contact Centre (only required for UMHH and Digital Services – select “users”, left side of screen, search and find the relevant user)

< [Back to user list](#)

General Properties Phone Queues Supervisor CRM & Tab permissions Interactions

Enabled ☒

First Name

Last Name

Display Name

Email Address

Outgoing Mail Server  [?](#)

Username

Internal Id

\* Current Country

\* Software language

\* Agent Group

Comment

Agent Experience Selection

You have the option to configure this agent to use the refreshed 'Agent Workspace' agent experience platform.

☐ Agent Console

☒ Agent Workspace - Activated for this agent

☐ Flexible - Allows this agent to switch between Agent Console and Agent Workspace

General Properties Phone Queues Supervisor CRM & Tab permissions Interactions

Interaction offer timeout

\* Agent primary language

Agent secondary language

Phone Connection Mode

Default Connection Mode [?](#)

Status-change Coding SPOA

☒ Allow agent to change Enable/Disable settings in Assigned Queues

☐ Allow agent to Pull e-mails from queue

☐ Allow agent to Delete pending e-mails

☐ Allow agent to Reject interactions

☒ Enable and show Options menu button

☒ Enable agent's My Recording feature

☐ Hide Customer Email and Voice (Phone Number) in CRM

# UMHH Call Handler/Clinician Configuration as at 22/09/22

General
Properties
**Phone**
Queues
Supervisor
CRM & Tab permissions
Interactions

**Workplace**

☒ Workplace phone: 533452
☐ Workplace SIP URI:

☐ Allow agent to change workplace phone
☒ Allow agent to change workplace SIP URI

This is the number, remembered from page 6 – enter it here without a “6” prefix.

**Outbound Calling**

Outbound Phone Codes: Single Point of Access
Calling Line ID \*: 441622477210 - 8x8, Inc.
Dial Plan: Tenant Default

\* can be overridden by Outbound Phone Codes

**Agent Access #'s and Voicemail**

Primary Agent Directory #: 6533452
☐ Enable in IVR
DAR Post-processing Timeout: Not set

**Automatic Call Recording**

100 % of inbound queue calls \*
100 % of direct inbound calls \*
100 % of outbound calls

\* can be overridden by IVR Voice recording settings

**Agent's Recording Controls**

☒ Agent does not have recording controls
☐ Agent is able to start recording \*
☐ Agent is able to start and pause recording \*

\* can be overridden by IVR Voice recording settings

Should be the same as number in top left with a 6 in front

**Channels and Scripts linked to this Agent**

Channel Name	Calling Name Display	Public Number	Script Name - Public Number	PBX#	Script Name - PBX Number
Michelle, Burr	-	-	-	6533452	Agent Extension script

## UMHH Call Handler/Clinician Configuration as at 22/09/22

Sort by Queue name

To make things easier, sort by queue name and select assigned & enabled as appropriate

General Properties Phone Queues Supervisor CRM & Tab permissions Interactions					
Queue List					
<input type="checkbox"/> Assign All <input type="checkbox"/> Enable All		<< < 1 > >> 200 records Configure Sort Clear All Sort			
Media	Queue name ^	Skill Level (click to change)	Agents enabled	Assigned	Enabled
Inbound Phone	8x8 test	80 - High	1	<input type="checkbox"/>	<input type="checkbox"/>
Outbound Phone	8x8 test cb	80 - High	1	<input type="checkbox"/>	<input type="checkbox"/>
Outbound Phone	SDesk CBK	80 - High	17	<input type="checkbox"/>	<input type="checkbox"/>
Inbound Phone	SDesk In	80 - High	16	<input type="checkbox"/>	<input type="checkbox"/>
Outbound Phone	SDesk Out	80 - High	17	<input type="checkbox"/>	<input type="checkbox"/>
Voice Mail	SDesk VM	80 - High	17	<input type="checkbox"/>	<input type="checkbox"/>
Inbound Phone	SPoA In	90	45	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Outbound Phone	SPoA Out	90	45	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Outbound Phone	SPoA Prof CB	20 - Low	45	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Inbound Phone	SPoA Prof In	20 - Low	45	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Outbound Phone	SPoA Prof OB	20 - Low	45	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

As required by  
– should be in  
the request

(Supervisor Tab – Agent Groups – can be ignored if user is not a supervisor)

If a supervisor – Supervisor Tab – **ONLY IF USER IS A SUPERVISOR**

User » Edit User » Supervisor » Queues

Tracey Horn

< [Back to user list](#)

General Properties Phone Queues **Supervisor** CRM & Tab permissions Interactions

☒ This user is supervisor ☒ Allow this supervisor to monitor calls ☐ Restrict report privileges

Monitoring

Queues Agent Groups Campaigns

Queue List [Filter Queue List](#)

☐ Assign All << < 1 > >> 100 records [Configure Sort](#) [Clear All Sort](#)

Media	Name	Default Priority	Assigned
Inbound Phone	SPoA In	9	<input checked="" type="checkbox"/>
Inbound Phone	SPoA Prof In	10	<input checked="" type="checkbox"/>
Outbound Phone	SPoA Out	9	<input checked="" type="checkbox"/>
Outbound Phone	SPoA Prof CB	10	<input checked="" type="checkbox"/>

If supervisor – Agent Groups Tab - **ONLY IF USER IS A SUPERVISOR**

Tracey Horn

< [Back to user list](#)

General Properties Phone Queues **Supervisor** CRM & Tab permissions Interactions

☒ This user is supervisor ☒ Allow this supervisor to monitor calls ☐ Restrict report privileges

Monitoring

Queues **Agent Groups** Campaigns

Agent Group List [Filter Agent Group List](#)

☐ Assign All << < 1 > >> 100 records [Configure Sort](#) [Clear All Sort](#)

Name	Agent Count	Comment	Assigned
ungroup	0		<input type="checkbox"/>
ICT Service Desk	18		<input type="checkbox"/>
SPOA	57		<input checked="" type="checkbox"/>

## CRM & Tab Permissions – for All

General	Properties	Phone	Queues	Supervisor	CRM & Tab permissions	Interactions			
		View	Create	Edit	Delete	Create a Follow-up	Change Status	Create a Report	Download a Report
Case		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Task		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	N/A	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Customer		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	N/A	N/A	<input type="checkbox"/>	<input type="checkbox"/>
Monitoring		<input type="checkbox"/>	N/A	N/A	N/A	N/A	N/A	N/A	N/A

## Interactions Tab - for All

General	Properties	Phone	Queues	Supervisor	CRM & Tab permissions	Interactions
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\* Max # of concurrent chats

☒ Enable agent to agent chat

Save Cancel

Finally, select “Status Codes” and click on the Pencil (Edit) ICON for the relevant team)

8x8
Home
Security
Agent Groups
Users
Queues/Skills
Channels
Scripts
CRM
Outbound Setup
Campaigns
Broadcast
Integration
Status Codes

Agent Status » STATUS CODE LISTS

List Add
100 records
Configure Sort
Clear All Sort

Active	Name	Assigns.	Trans.	Used	
<input checked="" type="checkbox"/>	ICT Service Desk	2	2		<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
<input checked="" type="checkbox"/>	SPOA	1	2	<input checked="" type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>

UMHH Call Handler/Clinician Configuration as at 22/09/22

Here we have selected SPOA and gone to the section “Assignments”

Then select “(Activate All)”

The screenshot displays the 'Agent Status » Edit Status Codes List » Assignments' page. On the left is a dark blue sidebar with navigation links: Home, Security, Agent Groups, Users, Queues/Skills, Channels, Scripts, CRM, Outbound Setup, Campaigns, Broadcast, and Integration. The main content area has a light blue header with the breadcrumb 'Agent Status » Edit Status Codes List » Assignments'. Below the header, it shows 'SELECTED LIST :: SPOA' and a '< Back to STATUS CODE LISTS' link. There are four tabs: Properties, Codes, Translations, and Assignments (which is active and underlined). Under the 'Assignments' tab, the section is titled 'Assignments'. It contains a list of three items, each with a checkbox and a folder icon: 'ungroup ( Assigned to ICT Service Desk )', 'ICT Service Desk ( Assigned to ICT Service Desk )', and 'SPOA ( Activate All | De-activate All )'. The checkbox for 'SPOA' is checked.

Select “Save”.



Finally, check/review the “Status Codes” and ensure that the user is selected, don’t forget to select “Save”

The screenshot shows the 8x8 Admin Console interface. The top navigation bar includes tabs for Application Panel, Admin Console, [kmpthns01] 8x8 Configuration, and Agent Desktop. The main header displays the user's name, Shaun Dudney (kmpthns01), and links for My Profile, Co-browsing, Help, and Logout. The left sidebar contains a navigation menu with options like Home, Security, Agent Groups, Users, Queues/Skills, Channels, Scripts, CRM, Outbound Setup, Campaigns, Broadcast, Integration, Status Codes (highlighted), Transaction Codes, Outbound Phone Codes, Wallboard, and Chat design. The main content area is titled 'Agent Status » Edit Status Codes List » Assignments'. It shows a 'SELECTED LIST :: SPOA' and a 'Back to STATUS CODE LISTS' link. Below this are tabs for Properties, Codes, Translations, and Assignments. The 'Assignments' tab is active, displaying a list of agents assigned to the SPOA status code. The list includes checkboxes for each agent, with the 'SPOA' status code selected. The agents listed are: Dolphin, Laura (ag0Y5ogE9vR0SCpEEBst82yw), NAIK, Vishvanath (ag0oiFwwM\_SFSE3ZewoOZ6WA), Sheffield, Antony (ag13H538SnSii7uUYgeWKb9Q), Horn, Tracey (ag2HADLAB9QSKXsgkemaw55g), East, Donna (ag3GdKp6KQSKSi0xB1dRNEeA), Pennington, Zoe (ag4ic8s8uKTWaa0ZcDliEiaQ), Pope, Rachel (ag54tLFRh6TqKLTdnet6bIbQ), Khumalo, Nositembiso (ag6fBCUBcsRWiFABvvgEtl8g), Noye, Susan (ag6thzisPKTVKeT1YV3luWlw), Williams, Nathential (ag6xyIGVoOTnuAjrXXjypQaA), WEBB, Michelle (ag88au6GRbSm28\_xLq1RcRQ), Marandure, Mazviita (ag9ar9dbOnQiCFmbwTxdRxOA), Vickers, Iain (agAKVloGu0Qny\_HQVSP3cMUQ), Smith, Daniella (agAL4YCsaQjVXQ2MJDxB6dQ), Konstantinou, Elaine (agBMIndajZTjKUgflCZ1\_9bQ), and Philpott, Christine (agCSV6uIXT13MPLstCstFQ).

Save Reset