



Foundation Agent Assist

Administration Guide v1.3.0

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1 Introduction

1.1 Overview

The Foundation Agent Assist Administration Guide provides detailed instructions for configuring and managing the Agent Assist platform. It covers all administrative tasks, including setting up organizations, projects, conversation profiles, and user accounts. This guide ensures administrators can efficiently manage resources and maintain system integrity.

1.2 Audience

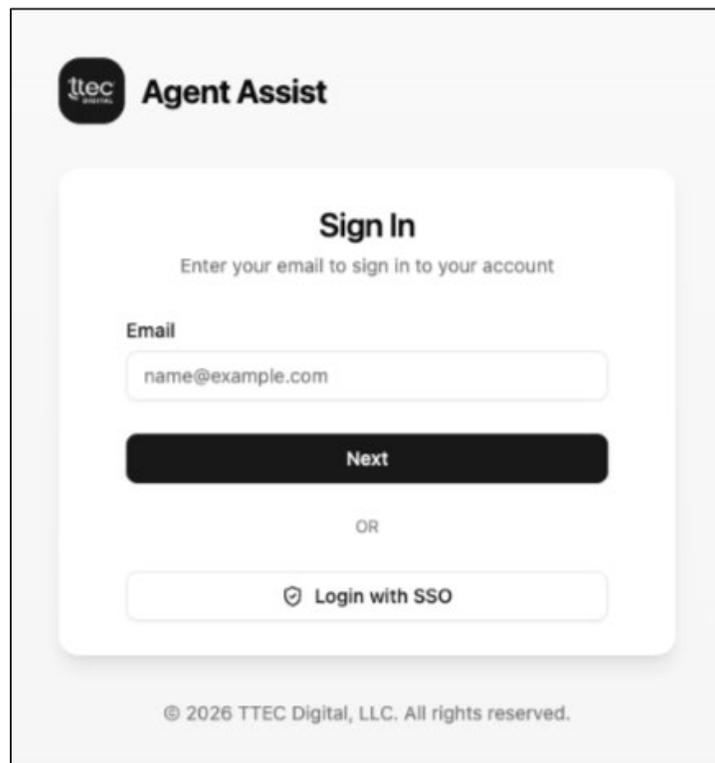
This guide is intended for administrators who manage the Agent Assist platform. Administrators (Admins) have full platform access and control. They manage organization-level settings, global configurations, projects, conversation profiles, and user accounts within their organization.

2 Access the Foundation Agent Assist Administration UI

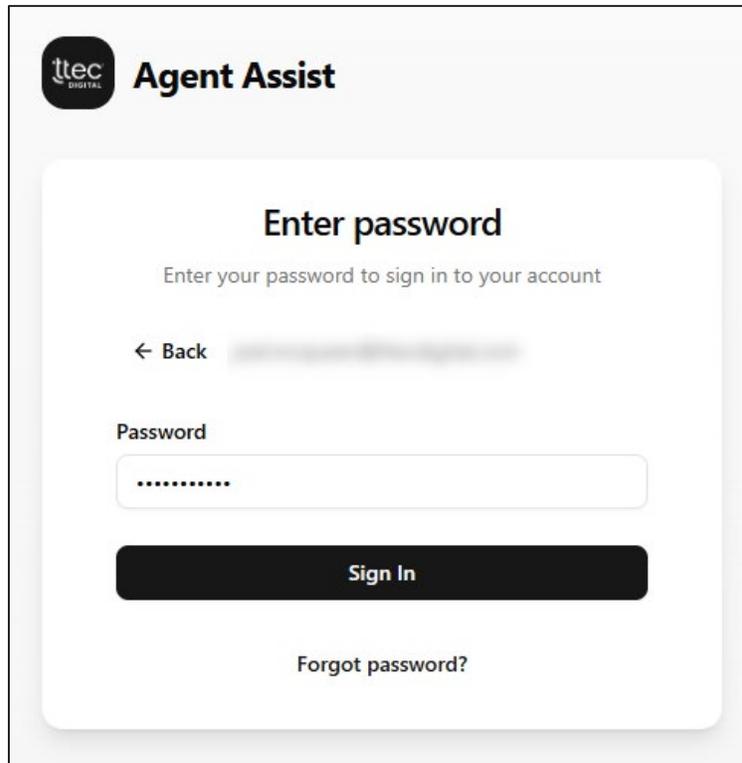
Sign into the Foundation Agent Assist tool and then open the Administration UI to start working with administrative settings. Open the administration interface from the Agent Console to begin managing settings.

2.1 Sign In

1. Access the Foundation Agent Assist Sign In page using the URL provided by your organization.
2. Either click **Login with SSO** if SSO is enabled, or enter your email address into the **Email** field and then click the **Next** button.



3. Enter your **Password** and click **Sign In**.
 - If SSO is configured, the password is optional and overridden.

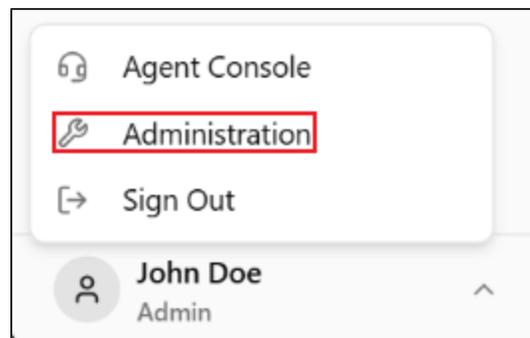


2.2 Access the Administration UI

Note: Access to the Administration panel requires the current user to have the **Admin** role.

Open Administration

1. Use the bottom-left user menu and select **Administration**.

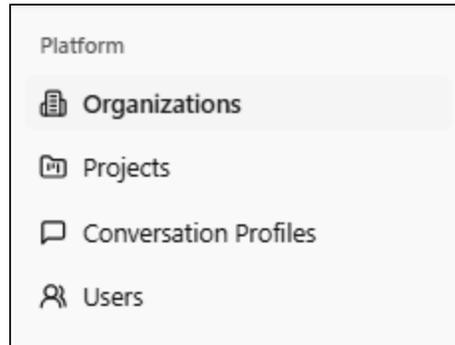


2.3 Navigating the Administration UI

The Administration interface includes a left panel used for navigating to all of the features:

1. Click the  (**Show/Hide Side Menu**) icon.
2. Choose from the following options:

- **Organizations:** Create and manage organizations that define the top-level structure for projects and users.
- **Projects:** Set up and maintain projects within an organization to group related resources.
- **Conversation Profiles:** Configure profiles that link projects to integration settings and routing logic.
- **Users:** Add and manage user accounts, assign roles, and control access to the platform.



3 Manage Organizations

The Organizations page gives you quick access to all organization records and tools for managing them. Use the search bar at the top to find an organization by name. The list displays key details for each organization, including Name, Status, and Created At date.

From this page, you can:

- View the list of organizations
- Search for organizations using the search field.
- Add new organizations.
- Edit existing organizations.

Note: You must create at least one organization before adding projects or conversation profiles.

Organizations
Manage organizations and their settings

Search organizations... + Add Organization

Name ↓	Status	Created At
TTEC Digital LLC	Your org	9/9/2025

1 total rows Rows per page 10 Page 1 of 1 Previous Next

3.1 View and Search Organizations

Use the search bar to find an organization by name. The list shows key details like name, status, and date of creation.

Search Organizations

Search for a specific organization by entering text in the **Search organizations** field.

View Organizations

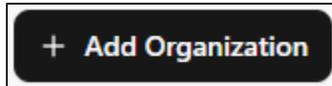
The following details are displayed for each organization:

- **Name:** Displays the name of the organization.
- **Status:** Displays the current status of the organization.
- **Created At:** Displays the organization's date of creation within Foundation Agent Assist.
- **Edit:** Click this button to edit the organization.

3.2 Add an Organization

Add a new organization by doing the following:

1. Click the + **Add Organization** button.



2. Complete the following:

- **Organization Name:** Provide a unique name for the organization.
- **Voice Connector:** Select the appropriate connector from the dropdown. If none is required, leave as **None**.

3. Click **Save** to add the new organization.

Add Organization

Create a new organization

Create Organization

Start by setting up the basic information for your organization. You can configure authentication and advanced settings after creation.

Organization Name ⓘ

Voice Connector ⓘ

→ **What's Next?**

After creating your organization, you should:

- Set up an authentication provider
- Create projects and conversation profiles
- Add users

Cancel + Save

3.3 Edit an Organization

To edit an existing organization, do the following:

2. Click **Edit** next to the organization name.



3. Modify the following fields under the **Basic Information** tab:

- **Organization Name**
- **Voice Connector**

Edit Organization
Update organization details and settings

Basic Information Authentication

Basic Information

Organization Name ?
TTEC Digital LLC

Voice Connector ?
Select voice connector

Cancel Save

4. Select the **Authentication** tab to configure SSO for the organization.
5. Choose one of the following options from the **Authentication Provider** dropdown.

Authentication
Configure how users will authenticate with this organization

Authentication Provider ?

Webex

None
Genesys
Finesse
Saml
Webex

- **None:** Select this option if you do not require any authentication for accessing the Agent Assist interface. This is typically used for testing or internal environments where security is not enforced.
- **Genesys:** Enables authentication through Genesys Cloud. After selecting this option, configure the following:
 - **Domain:** Enter the domain address for your Genesys Cloud domain.
 - **Client ID:** Enter the OAuth client ID from your Genesys Cloud application.
 - **Client Secret:** Click the **Set** button to enter the OAuth client secret from your Genesys Cloud application.

- **Finesse:** Uses Cisco Finesse for authentication. After selecting this option, configure the following:
 - **Finesse URL:** Enter the base URL for your Cisco Finesse server.
 - **Cisco Identity Server Public Key:** Click **Set** and enter the public key from your Cisco Identity Server.
- **SAML:** Enables Single Sign-On using Security Assertion Markup Language (SAML). This option supports identity providers such as Okta, Azure AD, and Ping Identity. After selecting this option, configure the following:
 - **Identity Provider Entity ID:** Enter the unique identifier (URI) for your SAML Identity Provider.
 - **SSO URL/Login URL:** Enter the SSO endpoint URL used to redirect users for authentication.
 - **Single Logout URL (Optional):** Enter the logout endpoint used to terminate SAML sessions.
 - **X.509 Certificate:** Click the **Set** button to enter the X.509 certificate from your Identity Provider between the **BEGIN CERTIFICATE** and **END CERTIFICATE** markers.
 - **Login Button Text:** Customize the text that appears on the SAML login button found on the login page.
 - **Unique ID:** A unique identifier used instead of email when authenticating users through SSO.
 - **Name:** The label your organization uses for its unique identifier. This label appears in the Add User form and in the Add Multiple Users template. The system stores the value internally as Unique ID, but the displayed label can differ by organization.
 - **Required for authentication:** Forces the system to authenticate users using the Unique ID instead of email. When enabled, the identity provider must return this identifier in the SAML assertion. If it is not enabled, the system accepts either email or Unique ID during authentication.
 - **CTI Path:** The source location in the organization's CTI system that provides the Unique ID value during user synchronization. This field is used only when the customer has a CTI integration that supplies agent identifiers. Smaller customers without CTI can ignore this field.
 - **SAML Attribute:** The attribute name in the SAML assertion that contains the organization's unique identifier. The identity provider must supply this attribute during authentication. The system maps the value from this attribute to the internal Unique ID field.
 - **SAML Metadata:** Provides the Service Provider metadata required to configure your Identity Provider. Use this section to view or download the metadata file that your IdP needs when setting up SAML SSO. The metadata includes the Service Provider entity ID, ACS (Assertion Consumer Service) endpoints, and certificate details used during SAML exchanges.

- **View Metadata:** Opens the Service Provider metadata in the browser so you can review the configured endpoints, entity ID, and certificate details used for SAML authentication.
 - **Download Metadata:** Downloads the Service Provider metadata file for use when configuring your Identity Provider.
- **Webex:** Enables authentication through Webex Contact Center. Users authenticate using their Webex CC account credentials, and the system validates access using Webex OAuth tokens. After selecting this option, configure the following:
 - **Authentication Provider:** Select the Webex authentication provider configured for your environment.
 - **Webex Client ID:** Enter the OAuth client ID from your Webex CC application.
 - **Client Secret:** Click Set and enter the OAuth client secret.
 - **Redirect URI / Callback URL:** Use the callback URL provided here when registering your OAuth client in Webex CC.
 - **OAuth Scopes (Optional):** Enter any additional Webex OAuth scopes required for your deployment.
 - **Login Button Text:** Enter the text to display on the Webex login button.
6. Click **Save** to apply changes.

The screenshot shows the 'Edit Organization' interface. At the top, the title 'Edit Organization' is displayed, followed by the subtitle 'Update organization details and settings'. Below this, there are two tabs: 'Basic Information' and 'Authentication'. The 'Authentication' tab is currently selected and highlighted with a red border. The main content area is titled 'Authentication' and includes the instruction 'Configure how users will authenticate with this organization'. Underneath, there is a section for 'Authentication Provider' with a help icon. A dropdown menu is visible, currently showing 'None'. At the bottom right of the form, there are two buttons: 'Cancel' and 'Save'.

4 Manage Projects

Projects connect Foundation Agent Assist to your Google Cloud environment, defining the resources and configurations required for integration. Each project is associated with an organization and can optionally use a service account for secure access to Google Cloud services such as Dialogflow CX, Pub/Sub, and Cloud Storage.

From the Projects page, you can:

- Create a new project and link it to an organization.
- Edit project details, including name, description, and region.
- Associate or update a service account for Google Cloud integration.
- Configure authentication settings for the project.
- Enable or disable project status (active/inactive).
- Delete a project when it is no longer needed.

Projects
Manage projects for your organizations

Search projects... + Add Project

Name ↓	Client Email	Environment Variable	Organization	Created At		
[Blurred]	[Blurred]	[Blurred]	TTEC Digital LLC	9/12/2025		
[Blurred]	[Blurred]	[Blurred]	TTEC Digital LLC	10/17/2025		

2 total rows Rows per page 10 Page 1 of 1 Previous Next

4.1 View and Search Projects

Use the search bar to quickly locate a project by name. The list displays key details for each project, making it easy to identify and manage your configurations.

Search Projects

Search for a specific project by entering text in the **Search projects** field.

View Projects

The following details are displayed for each project:

- **Name:** Displays the name of the project.
- **Client Email:** Shows the email address associated with the uploaded project service account key.
- **Environment Variable:** Displays the environment variable linked to the project for integration purposes.

- **Organization:** Indicates the organization associated with the project.
- **Created At:** Displays the project's creation date within Foundation Agent Assist.
- **Edit:** Click this button to edit the project.
- **Delete:** Click this button to delete the project.

4.2 Add a Project

Add a new project by using one of following two methods:

- **Enter Project Name:** Specify the Google Cloud project name (from the Google Cloud Platform console) where your CCAI conversation profiles are configured. This setting maps agent conversations to the correct Agent Assist features defined within the selected conversation profile.
- **Add Service Account Instead:** Provide a service account to automatically map all project keys and override the organization-level configuration. This option is intended for internal or advanced use cases only.

Note: At least one organization must exist before you can add a project.

4.2.1 Method 1 – Enter Project Name

1. Click the + **Add Project** button.



2. Configure the following details:

- **Organization:** Select an organization to associate with the project.
- **Project Name:** Enter the name of the project exactly as it is displayed in Google Cloud.

3. Click **Save**.

Add Project

Project Configuration
Configure the project details

Organization ⓘ

Select an organization ▼

Project Name ⓘ

Enter project name

Add Service Account Instead
Cancel
Save

4.2.2 Method 2 – Add Service Account

If you prefer a more secure and automated approach, use the **Add Service Account Instead** option. This method eliminates manual entry of the project name and directly links Agent Assist to your Google Cloud project using the service account key.

1. Click **Add Service Account Instead**.
2. Select an **Organization** to associate with the project.
3. Upload the **Service Account Key**:
 - Click **Choose JSON File** and select the service account key file from Google Cloud (JSON format, max 5MB).
 - The project name is automatically extracted from the file.
4. Click **Save**.

Add Project

Project Configuration
Configure the project details

Organization ⓘ
Select an organization

Service Account Key
Upload a service account key file. The project name will be automatically extracted from the JSON file:

Service Account Key ⓘ

Upload Service Account Key
JSON files only, max 5MB

Choose JSON File

Upload the service account key file in JSON format for authentication
Uploads the service account JSON file. Project name will be extracted automatically from the file.

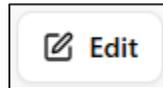
Use Project Name Instead Cancel Save

Note: If you prefer to manually enter the project name, select the **Use Project Name Instead** button.

Use Project Name Instead

3.3 Edit a Project

Edit a project by selecting the Edit button located next to the project in the list. Depending on how the project was created, you can edit it using one of the following methods:



3.3.1 Method 1 – Edit Project Name

If the project was created without a service account or does not require credential updates, you can edit the project name directly.

1. In the **Project Name** field, enter the new name.
2. Click **Update** to apply the changes.

 A screenshot of the "Edit Project" dialog box. The title is "Edit Project" with the subtitle "Update project details and settings". Below this is a section titled "Project Configuration" with the instruction "Configure the project details". A text input field labeled "Project Name" with a help icon is highlighted with a red border. At the bottom of the dialog, there are three buttons: "Add Service Account Instead", "Cancel", and "Update". The "Update" button is also highlighted with a red border.

Note: If you want to manually replace the existing key file to update credentials, select the **Add Service Account Instead** button.



3.3.2 Method 2 – Replace Service Account Key File

If the project uses a Google Cloud service account for integration, you can replace the existing key file to update credentials.

Important: A manually added service account key overrides the organization's default service account and configuration. This option is intended for internal or advanced use cases only.

1. Click **Choose JSON File**, then locate and select the service account key you want to upload.
2. Confirm the upload and click **Update** to apply the changes.

Edit Project

Update project details and settings

Project Configuration

Configure the project details

Service Account Key

Upload a service account key file. The project name will be automatically extracted from the JSON file:

Service Account Key ?

! Existing service account key

Current key will be preserved unless you upload a replacement



Upload Service Account Key

JSON files only, max 5MB

Choose JSON File

Upload the service account key file in JSON format for authentication

Uploads the service account JSON file. Project name will be extracted automatically from the file.

Use Project Name Instead

Cancel

Update

Note: If you prefer to manually edit the project name, select the **Use Project Name Instead** button.

Use Project Name Instead

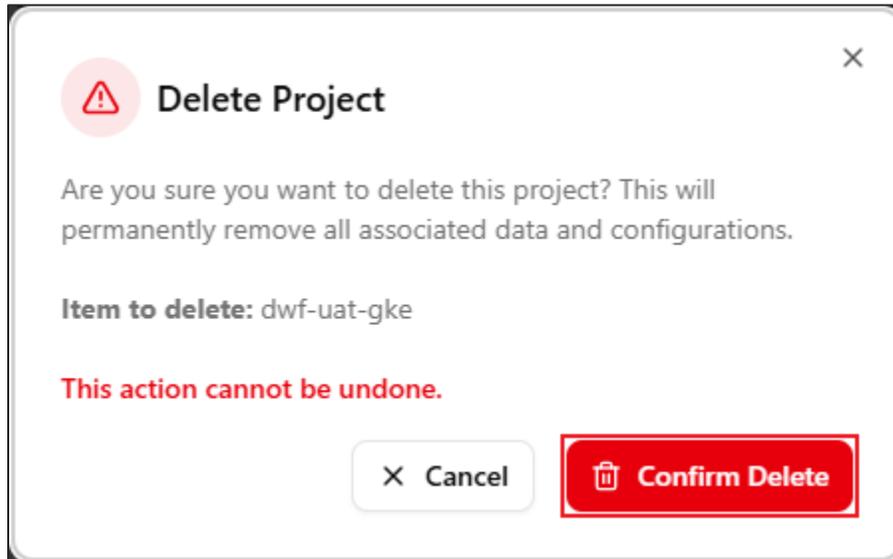
3.4 Delete a Project

Delete a project that is no longer needed by doing the following:

1. Click the **Delete** button located next to the project you want to delete. This opens the Delete Project dialog box.



2. Confirm the project deletion by clicking the **Confirm Delete** button.



4 Manage Conversation Profiles

Conversation profiles define how Foundation Agent Assist interacts with conversations and applies AI capabilities. Each profile specifies the configuration for processing, analyzing, and enriching conversations, including integration with Dialogflow CX, language settings, and AI model parameters.

Profiles are linked to a project, ensuring that conversation handling aligns with the correct environment and resources. By managing profiles effectively, you can tailor Agent Assist behavior to different use cases, such as real-time agent guidance, post-call analytics, or multi-language support.

From the Conversation Profiles page, you can:

- Create a new conversation profile and associate it with an organization and project.
- Edit conversation profile details, including name, description, and language settings.
- Configure Dialogflow CX integration for intent detection and virtual agent responses.
- Set AI parameters such as summarization, sentiment analysis, and transcription options.
- Enable or disable profiles based on operational needs.
- Delete profiles that are no longer required.

Conversation Profiles

Manage conversation profiles and their project associations

Search conversation profiles...

[+ Add Conversation Profile](#)

Name ↓	Integration ID	Project	Organization	Created At		
...	TTEC Digital LLC	9/12/2025	Edit	Delete
...	TTEC Digital LLC	10/17/2025	Edit	Delete

2 total rows

Rows per page: 10 | Page 1 of 1 | [Previous](#) | [Next](#)

4.1 View and Search Conversation Profiles

Use the search bar to quickly locate a conversation profile by name. The list displays key details for each profile, making it easy to identify and manage configurations.

Search Conversation Profiles

Search for a specific conversation profile by entering text in the **Search conversation profiles** field.

View Conversation Profiles

The following details are displayed for each conversation profile:

- **Name:** Displays the name of the conversation profile.
- **Integration ID:** Shows the unique identifier for the integration associated with the profile.
- **Project:** Indicates the project linked to the conversation profile.
- **Organization:** Displays the organization associated with the profile.
- **Created At:** Shows the date the profile was created within Foundation Agent Assist.
- **Edit:** Click this button to edit the conversation profile.
- **Delete:** Click this button to delete the conversation profile.

4.2 Add a Conversation Profile

Add a new conversation profile by doing the following:

1. Click the + **Add Conversation Profile** button.



2. Configure the following details:

- **Organization:** Select the organization you want to associate with the conversation profile.
- **Project:** Select the associated project.
- **Conversation Profile Name:** Enter a unique name for the profile.
- **Google Conversation Profile ID:** Enter the ID from Google Cloud.
- **Profile Mapping (Optional):** Leave blank unless instructed by engineering. This field is not required for basic setup.
- **Set as Default (Optional):** Toggle this option on if you want this profile to apply to all agents in the organization.

Notes:

- The Google Conversation Profile ID must be retrieved from GCP.
- For most deployments, start with one profile. Larger customers may add multiple profiles.

3. Click **Save**.

Add Conversation Profile

Create a new conversation profile for your organization

Conversation Profile Details

Configure the conversation profile information and associations

Organization ⓘ

Select an organization

Project ⓘ

Select a project

Conversation Profile Name ⓘ

Enter conversation profile name

Google Conversation Profile ID ⓘ

Enter the Google Conversation

Profile Mapping

Mapping Key Path	Mapping Value

Add Row

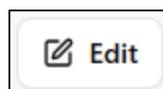
Set as Default ⓘ

Cancel **+ Save**

4.3 Edit a Conversation Profile

To edit an existing conversation profile, do the following:

1. Click **Edit** next to the conversation profile.



2. Modify the following details as needed:

- **Organization:** Change the organization you want to associate with the conversation profile.
- **Project:** Change the associated project.
- **Conversation Profile Name:** Enter a unique name for the profile.
- **Google Conversation Profile ID:** Enter the ID from Google Cloud.

- **Profile Mapping (Optional):** Leave blank unless instructed by engineering. This field is not required for basic setup.
- **Set as Default (Optional):** Toggle this option on if you want this profile to apply to all agents in the organization.

Edit Conversation Profile

Update conversation profile settings and associations

Conversation Profile Details
Configure the conversation profile information and associations

Project ⓘ
sa-training-466722

Conversation Profile Name ⓘ
Sandcastle Agent Assist

Google Conversation Profile ID ⓘ
[Redacted]

Profile Mapping

Mapping Key Path	Mapping Value

Add Row

Set as Default ⓘ

Cancel
Save

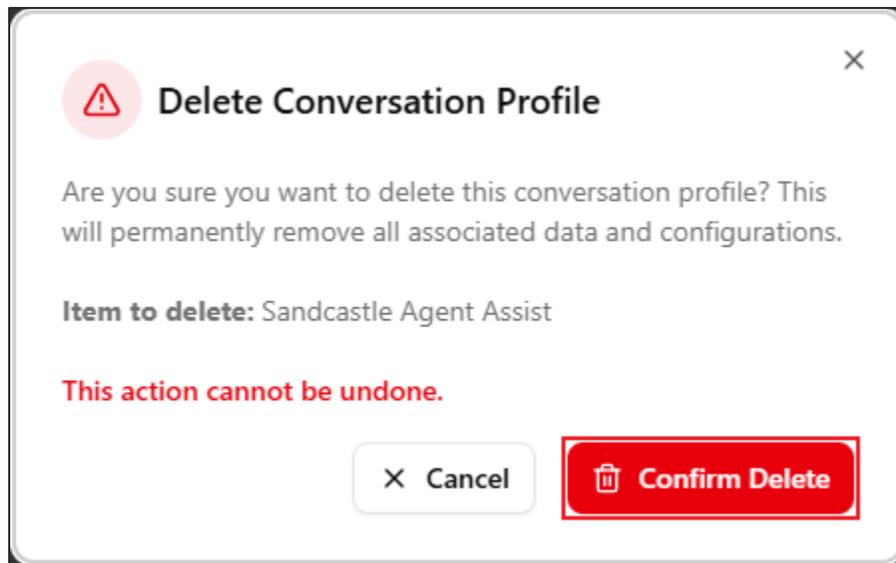
4.4 Delete a Conversation Profile

Delete a conversation profile that is no longer needed by doing the following:

1. Click the **Delete** button located next to the profile you want to delete. This opens the Delete Profile dialog box.



2. Confirm the profile deletion by clicking the **Confirm Delete** button.



5 Manage Users

The Users page allows administrators to control access to Foundation Agent Assist by managing user accounts and permissions. Proper user management ensures that only authorized individuals can configure, monitor, and operate the system according to organizational policies.

From the Users page, you can:

- View all users currently registered in the system.
- Search for a user by name or email.
- Add a new user and assign appropriate roles.
- Edit user details, including name, email, and role.
- Update user status (active/inactive).
- Delete a user when access is no longer required.

5.1 View and Search Users

Use the search bar to quickly locate a user by name or email. The list displays key details for each user, making it easy to identify and manage access.

Search Users

Search for a specific user by entering text in the **Search users** field.

View Users

The following details are displayed for each user:

- **Name:** Displays the user's full name.
- **Email:** Shows the email address associated with the user account.
- **Extension:** Displays the user's phone extension (if applicable).
- **Role:** Indicates the user's assigned role (e.g., Admin, User).
- **Organization:** Displays the organization the user belongs to.
- **Created At:** Shows the date the user account was created within Foundation Agent Assist.
- **Edit:** Click this button to edit the user's details.
- **Delete:** Click this button to remove the user from the system.

Users

Manage users and their permissions

Search users... Resync Add Multiple Users + Add User

Name ↓	Email	Extension	Role	Organization	Created At		
[blurred]	[blurred]	N/A	admin	TTEC Digital LLC	9/9/2025	Edit	Delete
[blurred]	[blurred]	N/A	admin	TTEC Digital LLC	10/29/2025	Edit	Delete
[blurred]	[blurred]	N/A	admin	TTEC Digital LLC	10/17/2025	Edit	Delete
[blurred]	[blurred]	N/A	admin	TTEC Digital LLC	9/17/2025	Edit	Delete
[blurred]	[blurred]	N/A	admin	TTEC Digital LLC	11/5/2025	Edit	Delete
[blurred]	[blurred]	N/A	admin	TTEC Digital LLC	10/17/2025	Edit	Delete
[blurred]	[blurred]	N/A	admin	TTEC Digital LLC	10/13/2025	Edit	Delete
[blurred]	[blurred]	N/A	admin	TTEC Digital LLC	9/22/2025	Edit	Delete
[blurred]	[blurred]	N/A	admin	TTEC Digital LLC	9/9/2025	Edit	Delete

9 total rows Rows per page 10 Page 1 of 1 Previous Next

5.2 Add a User

To add one of the following user types:

- **User:** A contact center agent with access limited to features required for handling conversations and using Agent Assist capabilities.
- **Admin:** Has full administrative rights across all organizations. Admins can manage every aspect of the system, including:
 - Organizations
 - Projects
 - Conversation profiles
 - User accounts

1. Click the + **Add User** button.



2. Complete the following **Basic Information** fields on the Add User page:
 - **Organization:** Select the organization the user belongs to.
 - **Name:** Enter the user's full name.
 - **Email:** Enter the user's email address.
 - **Agent Extension:** (Optional) Enter the agent extension number.
 - **Unique ID:** This field appears only when the organization uses SAML SSO and has configured a Unique ID label. The label may differ by organization (e.g., some organizations use LID). This value is required only if the organization enabled Required for authentication in its SAML settings. See [Edit an Organization](#) for additional information.
 - **Role:** Select one of the following roles to assign for the user:
 - Admin
 - User
3. Configure **Password Setup**:
 - If SSO is enabled, password entry is optional and overridden.
 - Choose one of the following options:
 - Click **Generate Password** for an auto-generated password.
 - Manually enter a **Password** and confirm it.
4. Click **Save**.

Add User

Create a new user account

Basic Information
Enter the user's personal details and contact information

Organization ⓘ
Select an organization ▼

Name
John Doe

Email
name@example.com

Agent Extension
Enter agent extension number

Unique ID ⓘ
Enter ID

Role ⓘ
Please select a role ▼

Password Setup
Configure user password (optional)

ⓘ You can auto-generate a secure password by clicking the button below, or manually enter a password.

Generate Password

Password ⓘ
Enter password or use generate button ⓘ

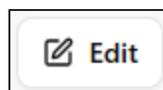
Confirm Password
Confirm the password above ⓘ

Cancel + Save

5.3 Edit a User

To edit an existing user, do the following:

1. Click **Edit** next to the user.



2. Edit the following **Basic Information** fields on the Add User page, as needed:

- **Organization:** Select the organization the user belongs to.
- **Name:** Change the user's full name.
- **Email:** Change the user's email address.
- **Agent Extension:** (Optional) Change the agent extension number.
- **Unique ID:** This field appears only when the organization uses SAML SSO and has configured a Unique ID label. The label may differ by organization (e.g., some organizations use LID). This value is required only if the organization enabled Required for authentication in its SAML settings. See [Edit an Organization](#) for additional information.
- **Role:** Select one of the following roles to assign for the user:
 - Admin
 - User

3. Configure **Password Setup:**

- If SSO is enabled, password entry is optional and overridden.
- Choose one of the following options:
 - Click Generate Password for an auto-generated password.
 - Manually enter a Password and confirm it.

4. Click **Save.**

Edit User

Update user details and permissions

Basic Information
Enter the user's personal details and contact information

Name

Email

Agent Extension

Unique ID ⓘ

Role ⓘ

Password Setup
Configure user password (optional)

ⓘ You can auto-generate a secure password by clicking the button below, or manually enter a password.

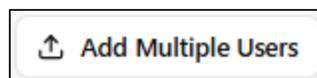
Password ⓘ

Confirm Password

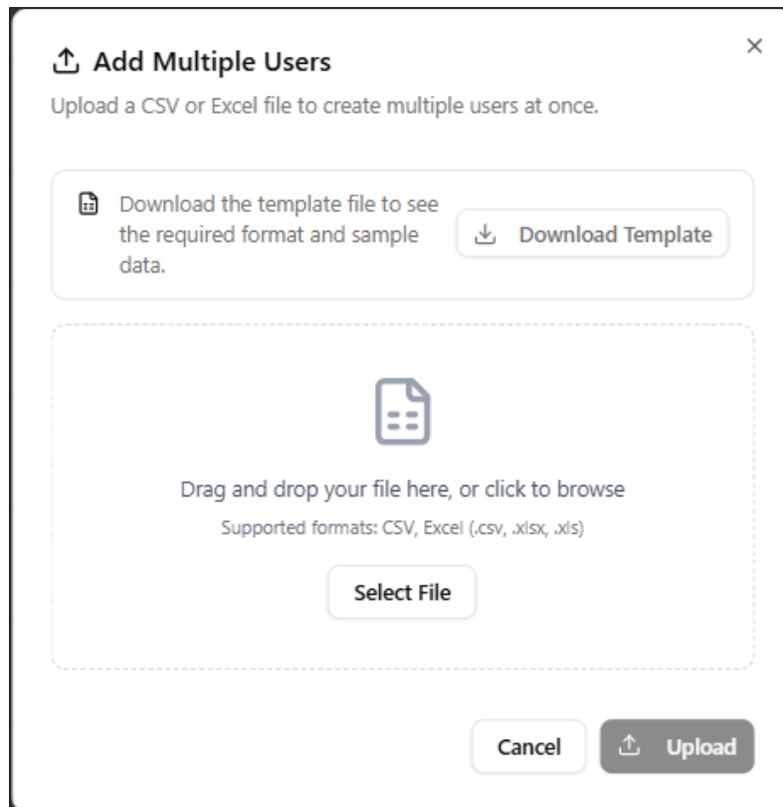
5.4 Add Multiple Users

Use this option to upload several users at once with the downloadable template file.

1. Click the **Add Multiple Users** button.



2. In the Add Multiple Users window, click **Download Template** to get the required file format.



3. The template includes the correct columns and sample data. Prepare your CSV or Excel file using the template structure.

	A	B	C	D	E	F	G
1	Organization	First Name	Last Name	Email	Agent Extension	ID	Role
2	Acme, Inc	John	Doe	john.doe@example.com	1234	ID123	user
3	Acme, Inc	Jane	Doe	jane.doe@acme.com	4321	ID124	user
4	Acme, Inc	Lional	McLaughlin	Lmclaughlin@acme.com	1122	ID321	admin
5	Acme, Inc	Zoey	Barnes	z.barnes@acme.com	111	ID333	admin

4. Drag and drop your file into the upload area, or click Select File and browse for the file.

Note: Supported formats: CSV, XLSX, XLS.

5. After the file is selected, click **Upload**.
6. When the upload is complete, review the results and confirm that all users were added successfully.

5.5 Resync Users

The **Resync** button provides a manual way to refresh user data when automatic synchronization has not yet occurred or when user records appear out of date. Both automatic and manual sync operations request updated agent information from the connected contact center platform.



5.5.1 When to Use Resync

Use the **Resync** button in the following scenarios:

- User records appear incorrect or out of date.
- You need changes to appear before the next scheduled automatic sync.
- The connected platform (such as Avaya) relies on manual sync rather than scheduled sync.

Automatic sync behavior:

- Webex CC environments sync automatically every configured interval (commonly 15–30 minutes).
- Avaya environments require the administrator to trigger the sync manually.
- The sync process creates new users and updates existing users. If a user exists in Foundation but is not present in the CTI payload, the system does not remove that user.
- Users are deleted only when the CTI system explicitly sends a deletion event (operation: "DELETE").

Note: The manual Resync process triggers the same synchronization mechanism used by automatic sync.

5.5.2 Steps to Resync Users

1. Click the **Resync** button located at the top of the page.
2. Wait for the process to complete. The system updates existing user records with new values received from the CTI system. Duplicate records are not created.

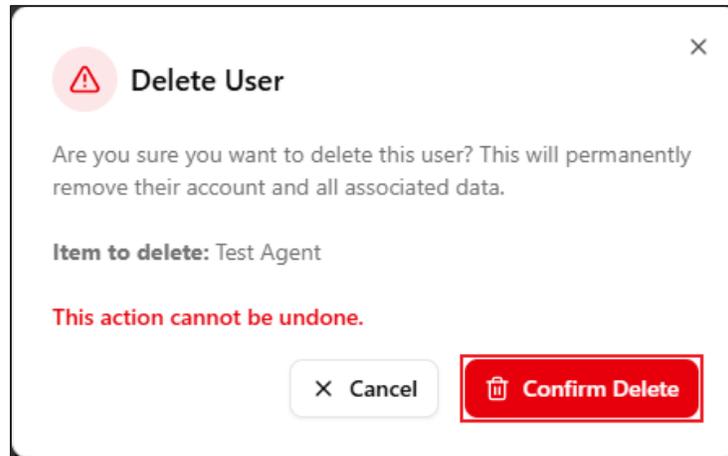
5.6 Delete a User

Remove a user that is no longer needed by doing the following:

1. Click the **Delete** button located next to the user you want to delete. This opens the Delete User dialog box.



2. Confirm the user deletion by clicking the **Confirm Delete** button.



6 Revision History

Date	Description of Change
March 4, 2026	Updated SAML details for Unique ID.
March 3, 2026	Added Authentication details to the Edit and Organization subsection.
February 26, 2026	Updated guide for removal of the "Super Admin" role.
December 11, 2025	Creation of document.