WISCONSIN DEPARTMENT OF HEALTH SERVICES
Division of Medicaid Services
1 W. Wilson St.
Madison WI 53703

To: Genesys User Guide Users

From: Jori Mundy, Bureau Director
Bureau of Eligibility and Enrollment Policy

Re: **Genesys User Guide Release 23-01**

Release Date: 02/25/2023

EFFECTIVE DATE	The following additions or changes are **effective 02/25/2023** unless otherwise noted. **Underlined text denotes new text. Text with a strike through it denotes deleted text.**
POLICY UPDATES	
2.3 Forgotten Credentials	Updated language and Screenshots
7.2.3 Downloading and Saving a Call from Genesys	Renamed section and updated downloading instructions.
9.2.1 Running Reports	*New Section*
9.2.2.1 Email Subscription	*New Section*
9.2.2.2 History List Subscription	*New Section*
9.2.3 Editing Subscriptions	*New Section*
9.2.4 Unsubscribing from Subscriptions	*New Section*
9.2.5 Recommended Queue and Agent Reports	*New Section*
9.2.5.1 Agent Performance Report V2.0	*New Section*
9.2.5.2 Queue Statistics_Adjusted	*New Section*
9.2.5.3 Queue Statistics_Adjusted_CB	*New Section*
11.1 Accessing Genesys Troubleshooting	Updated to include Genesys Support Ticket instructions.
11.2 Status Troubleshooting	Updated to include Genesys Support Ticket instructions.
11.5 Supervisor and Administrator Troubleshooting	Updated to include Genesys Support Ticket instructions.
11.6 Submitting a Genesys Support Ticket	*New Section*

Contents

2.3 Forgotten Credentials

(Video instructions available: Forgotten Credentials)

To access Genesys the user must have a valid WAMS ID.

Use these instructions ~~if you forget your WAMS user ID or password to regain access to Genesys.~~

~~To~~ recover ~~your~~a forgotten WAMS user ID or password:

1. Open the on.wisconsin.gov page.
2. Select **Account Recovery** to reset ~~your~~ the WAMS ~~username~~user ID or password.

   ~~You~~The user can attempt to sign in as many times as needed, ~~but~~ after three unsuccessful login attempts, ~~you will be~~the user is locked out of ~~other~~all applications that ~~you~~ require use ~~your~~ of a WAMS ID.
   Show/Hide an example of the page

WISCONSIN.GOV

Wisconsin User ID

Home Logout Help FAQ

Web Access Management System (WAMS)

The States Web Access Management System (WAMS) allows authorized individuals to access State Internet applications using the same means of identification for all State Web applications. For example, a citizen can use the same Wisconsin User ID and password to acquire overweight trucking permits and Emergency Medical Technician certification.

When access to information or services is restricted, to protect your privacy or the privacy of others, you will be asked to provide a Wisconsin User ID and password. Your Wisconsin User ID and password verifies your identity so that we can provide you with access to your information and services and prevent access by unauthorized individuals.

Please note that only certain types of information will be stored in your user profile, as described in the **User Acceptance Agreement.** Your user profile will never collect or contain information about you, such as your driving history, tax information, unemployment compensation or vehicle registrations.

Self-Registration (Request a Wisconsin User ID and Password.)

Self-Registration allows you to create **your personal** Wisconsin Login Account. This is your key to doing secure business with the State of Wisconsin over the Internet. This account belongs to you. It does not belong to your current employer.
Note: You must provide a valid, unique e-mail address to self-register for a Wisconsin Login Account. Correspondence regarding your Wisconsin User ID, password or other information about your Wisconsin Login Account will be sent to this e-mail address.

Profile Management

Profile Management allows you to change your account information, e-mail address, password and other information.

Logout (Terminate your account session.)

Logout shuts down your current session. To access a secured application you will have to login again.
Note: If Logout takes you to the Login panel, you are already logged out of the account session and no action is needed.

Account Recovery (Forgot your Wisconsin User ID or password?)

Account Recovery is used to restore access to your account if you can not remember your password or your Wisconsin User ID.
Note: You must know the answer to your secret question and you must have access to the e-mail address in your account. A link provided in an e-mail is used to continue Account Recovery.

For assistance send an e-mail to Help Wisconsin Support

WISCONSIN.GOV

Wisconsin User ID

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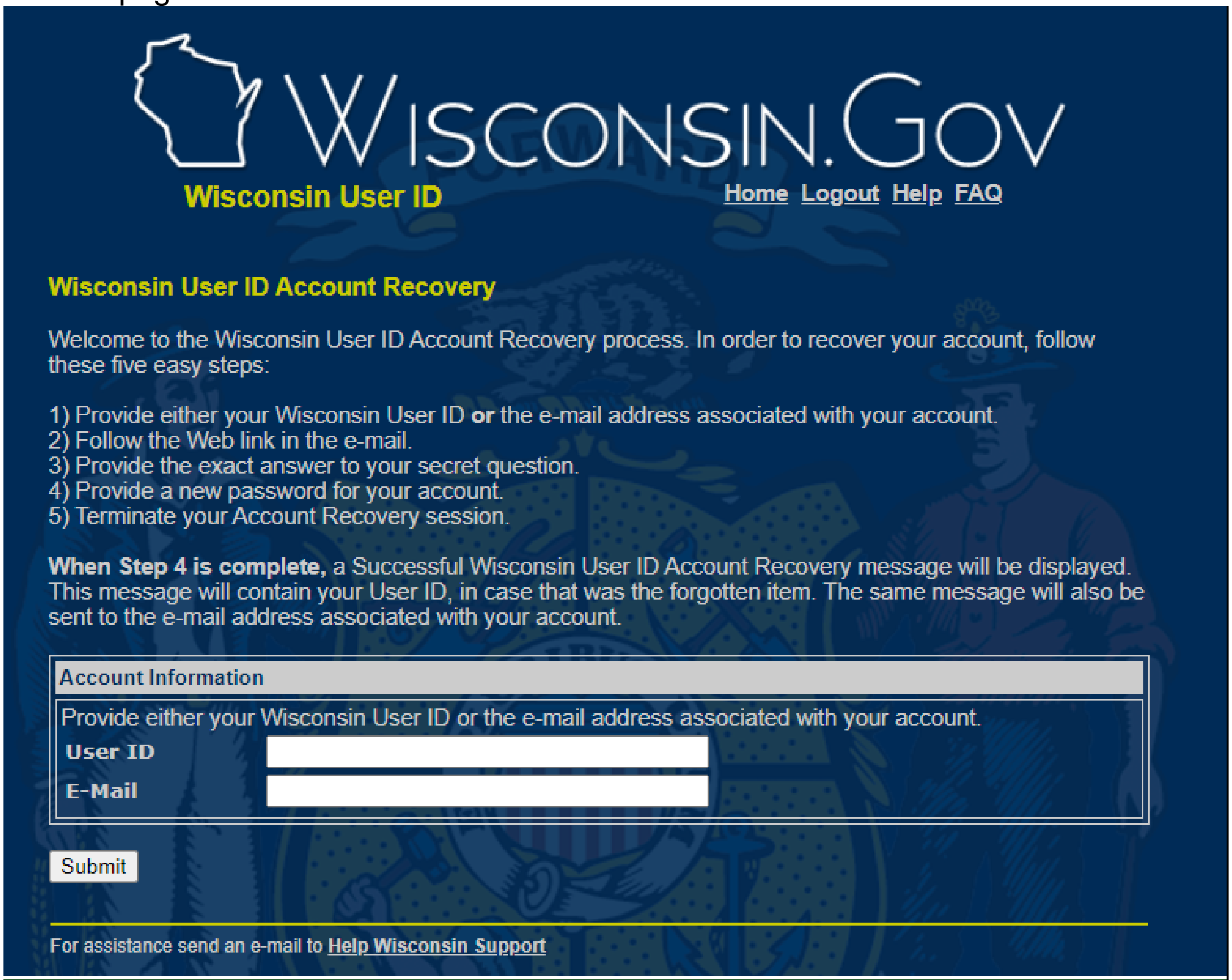
For assistance send an e-mail to **Help Wisconsin Support**

3. Follow the Wisconsin User ID Account Recovery instructions on the Wisconsin User ID page.



7.2.3 Telephonic Signature Recording Missing ~~in~~In The ECF

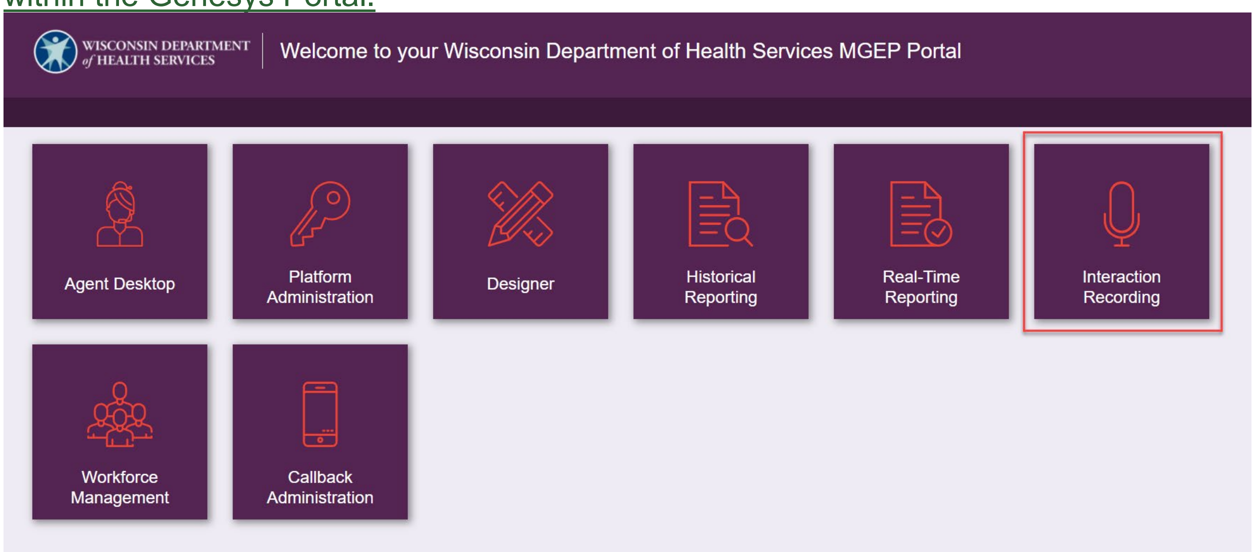
(Video instructions available: Download the Call and Upload the Call to the ECF)

~~If the telephonic signature recording is not found in the Electronic Case File (ECF), supervisors~~Staff with supervisor access can use Interaction Recording to download ~~the full~~a phone recording and ~~upload~~save it to ~~the ECF.~~their computer. This process cannot be completed for calls older than 30 days.~~ If the recording can't be found with this process, you must reach out to the applicant or member to collect a new signature.~~

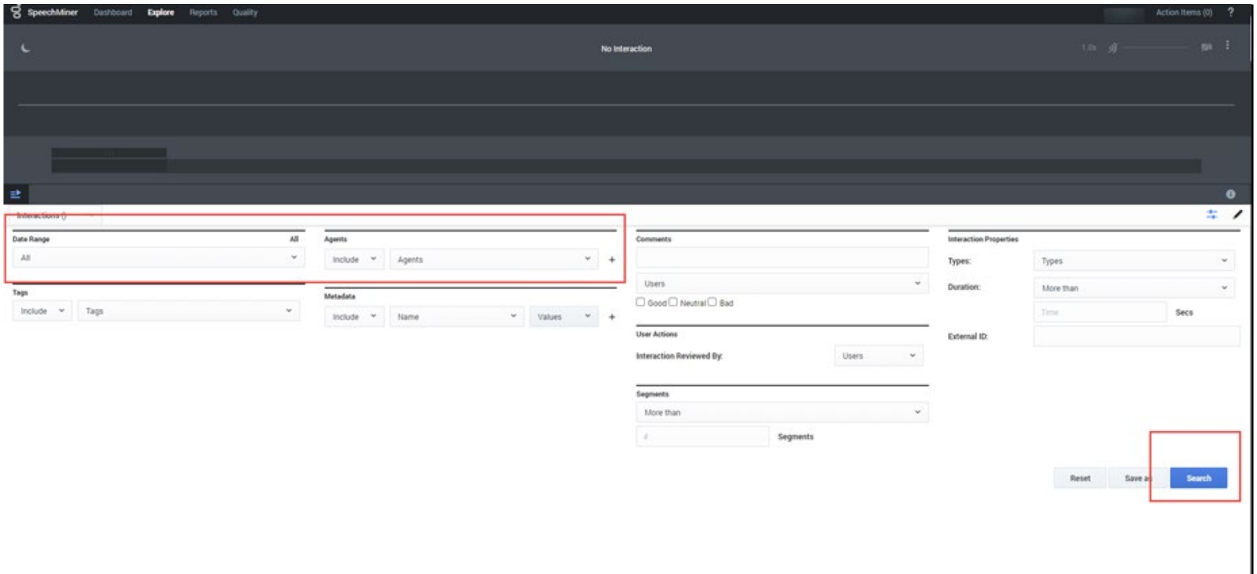
Note:	Compression software (such as WinZIP) is required to complete this process. Contact your local IT department if compression software is not installed.

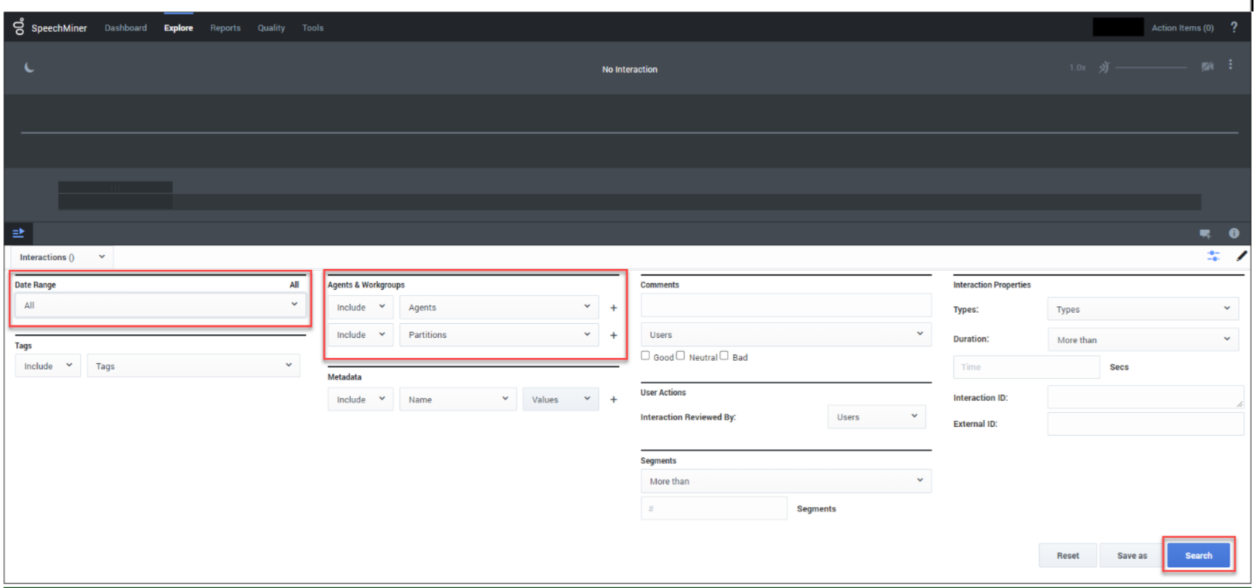
To download the call~~ and upload it to the ECF~~:

1. The person with supervisor access opens the **Interaction Recording** application within the Genesys Portal.

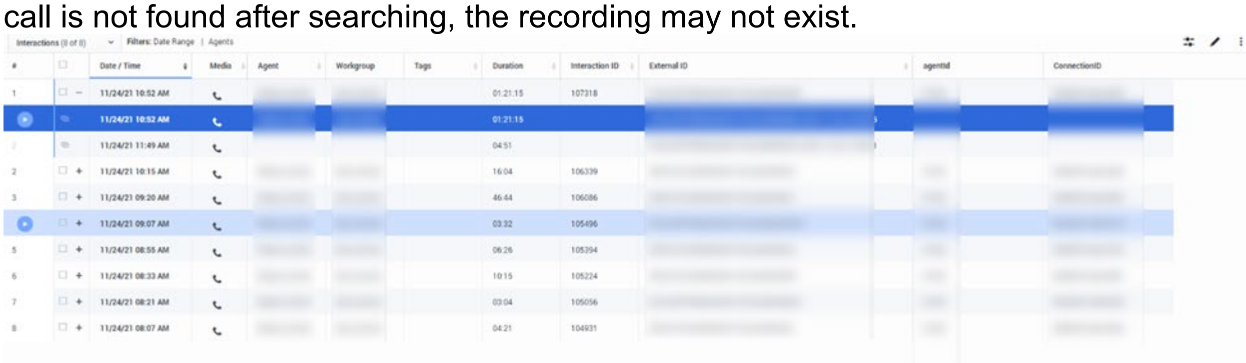


~~1.~~2. Open the Explore Tab and begin searching by using the "Date Range" or "Agent" filters. Select **Search**.



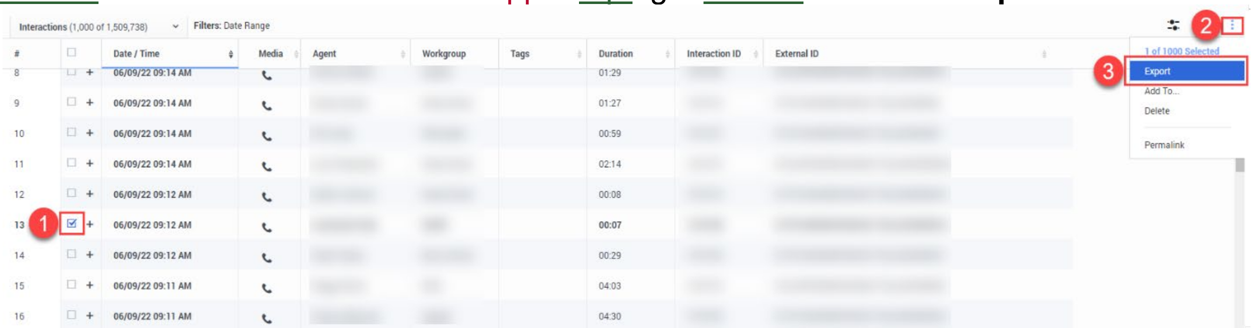


~~2.~~3. Go through the recordings to find the one ~~that matches the RFA or Case. Make sure the telephonic signature is captured in the recording.~~of interest. If the call is not found after searching, the recording may not exist.

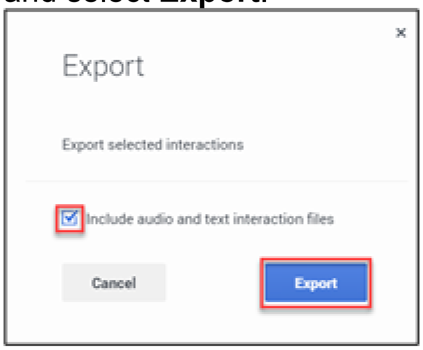


~~3.~~4. To download the call, check the box next to the call.

~~4.~~5. Select the three dots in the ~~upper~~ top right corner and select **Export**.

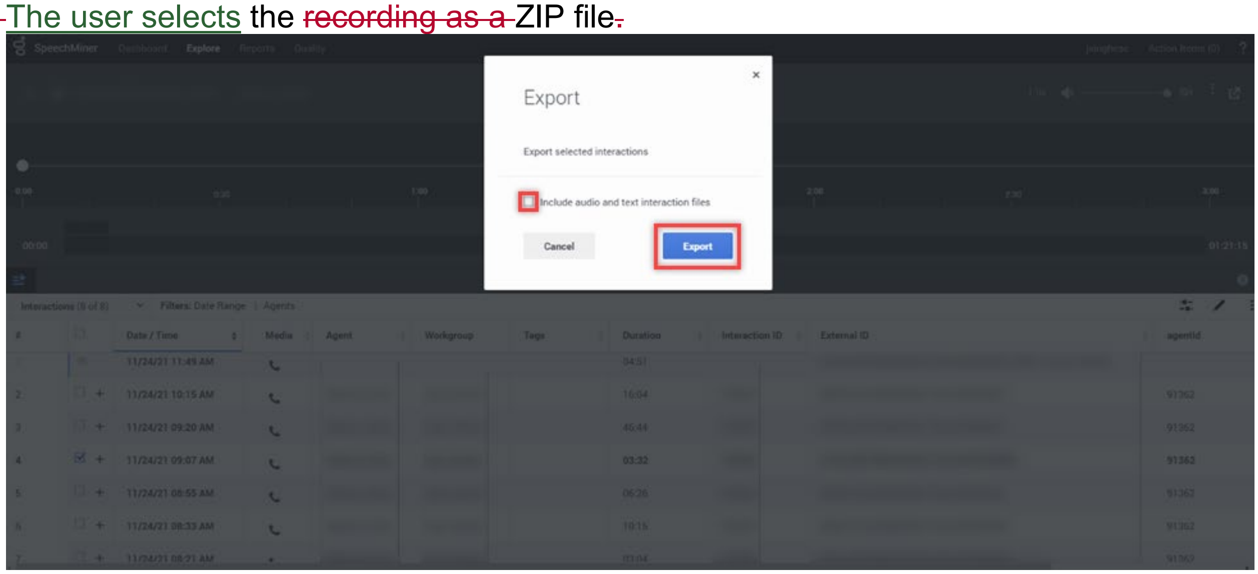


6. A pop-up displays. Check the box **Include audio and text interaction files** ~~box~~ and select **Export**.

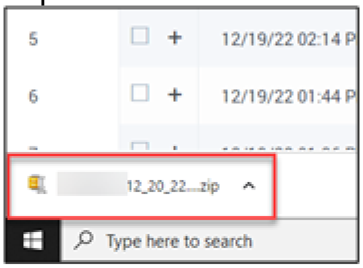


~~This downloads~~

~~1.~~ The user selects the ~~recording as a~~ ZIP file~~.~~



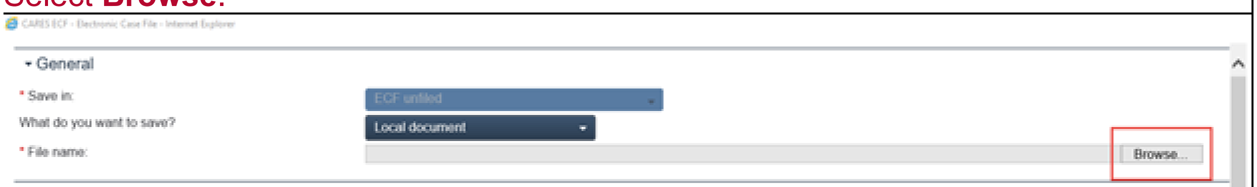
~~5.~~7. ~~Select the ZIP file, unzip~~, unzips it, and ~~save~~saves the recording to ~~your~~their computer. If ~~you need help~~the user needs assistance on how to unzip~~,~~ and save the recording to their computer, they should contact ~~your~~their local IT department.



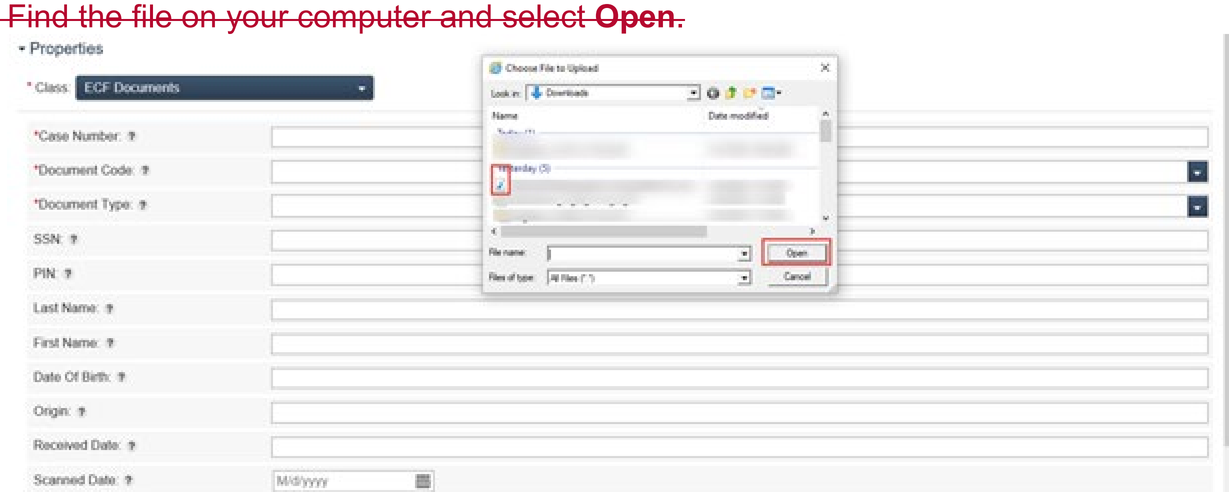
~~2. Once the file is saved, log in to ECF View.~~

~~3. Select the icon with three lines and a downward arrow in the upper right and select **Add Document**. This opens a page~~Income Maintenance (IM) workers looking for instructions to upload the recording ~~and enter the recording information.~~

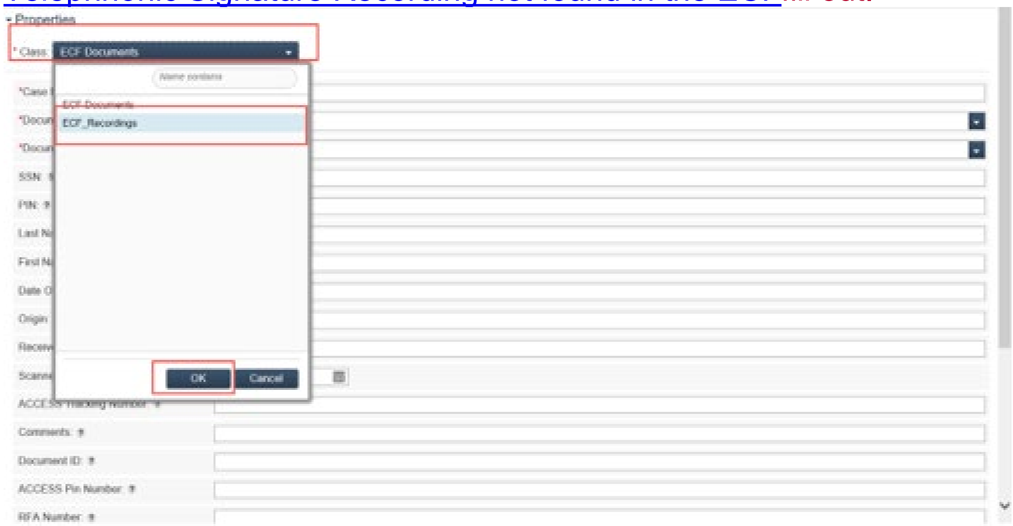
~~4. Select **Browse**.~~



~~5. Find the file on your computer and select **Open**.~~



~~Select the **Class** dropdown menu. Then select **ECF_Recordings** and **OK**. This refreshes the page and displays the required fields~~ to the ECF see Process Help 6.5.2.1 Telephnonic Signature Recording not found in the ECF~~fill out.~~



6. ~~Enter information for all the required fields including the "Telephonic Signature ID" and "Recording User ID" fields.~~
    1. ~~Enter `TSIG` for the document code.~~
    1. ~~The ECF requires both a Case number and a RFA number. If working on a case recording, enter 0000000000 for the RFA number and vice versa if working on a RFA recording.~~

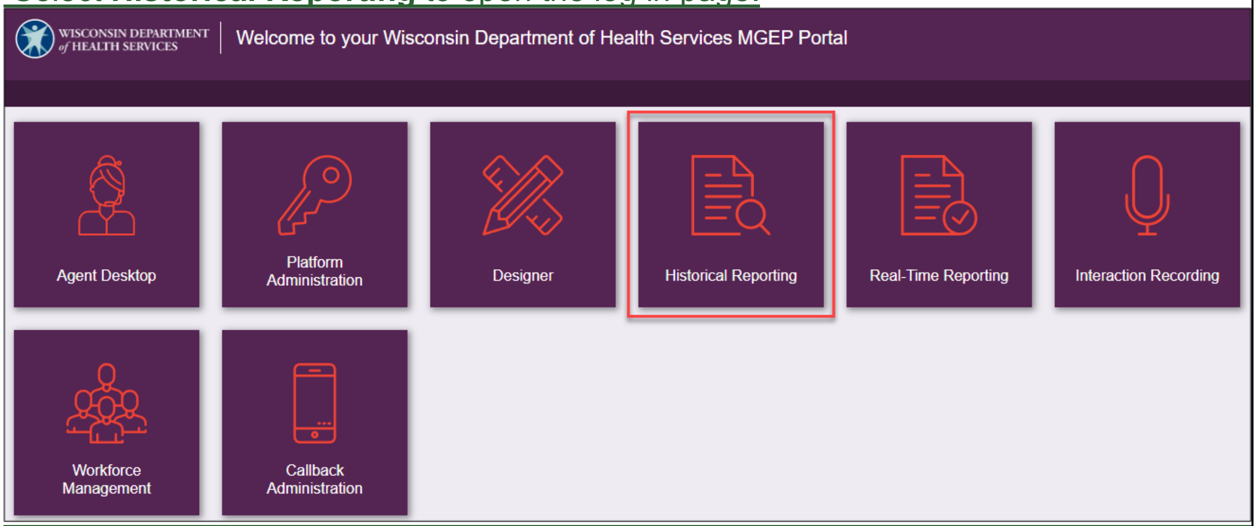
7. ~~Select **Add**.~~

9.2.1 Running Reports

(Video instructions available: Running Reports)

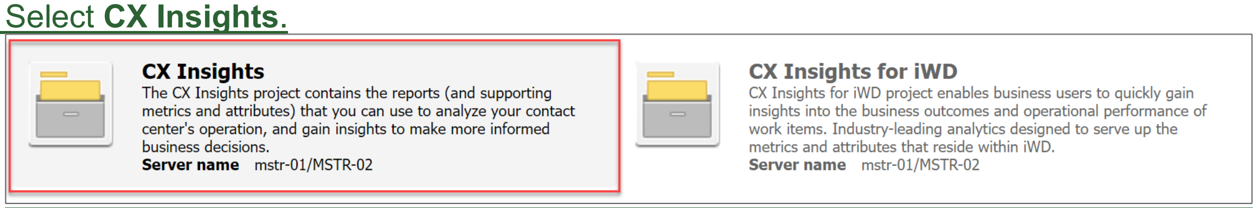
All tasks for managing historical reporting take place in Historical Reporting.

1. To log in, open Genesys Portal with Firefox, Edge, or Chrome.
   Select **Historical Reporting** to open the log in page.

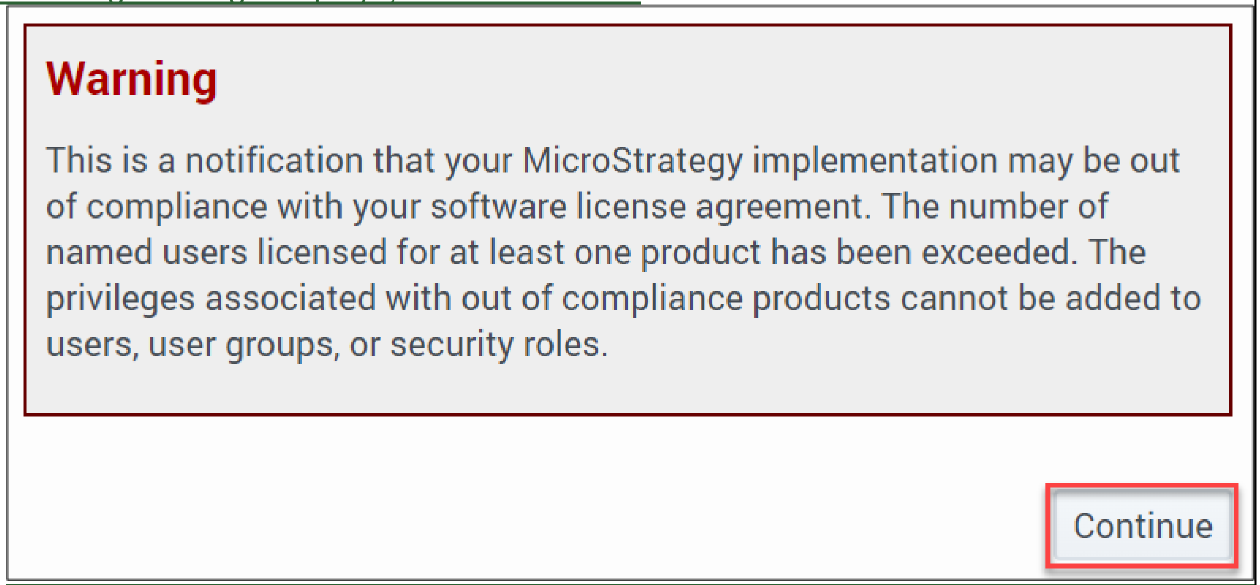


2. Enter the WAMS ID and password.

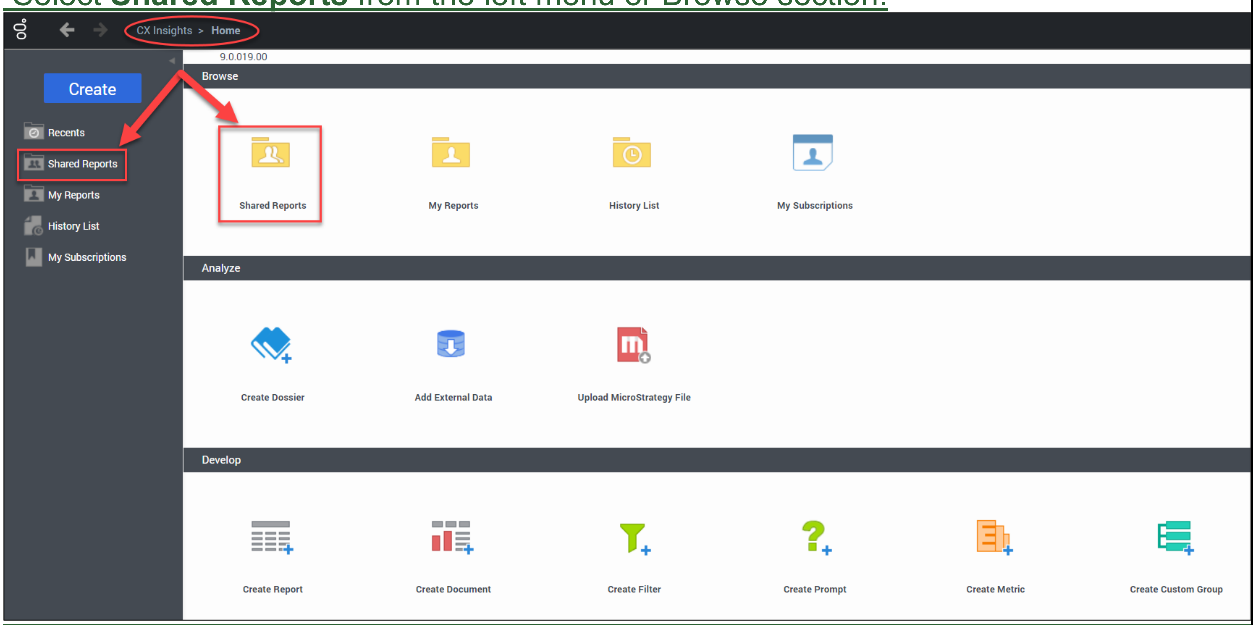
3. Select **CX Insights**.



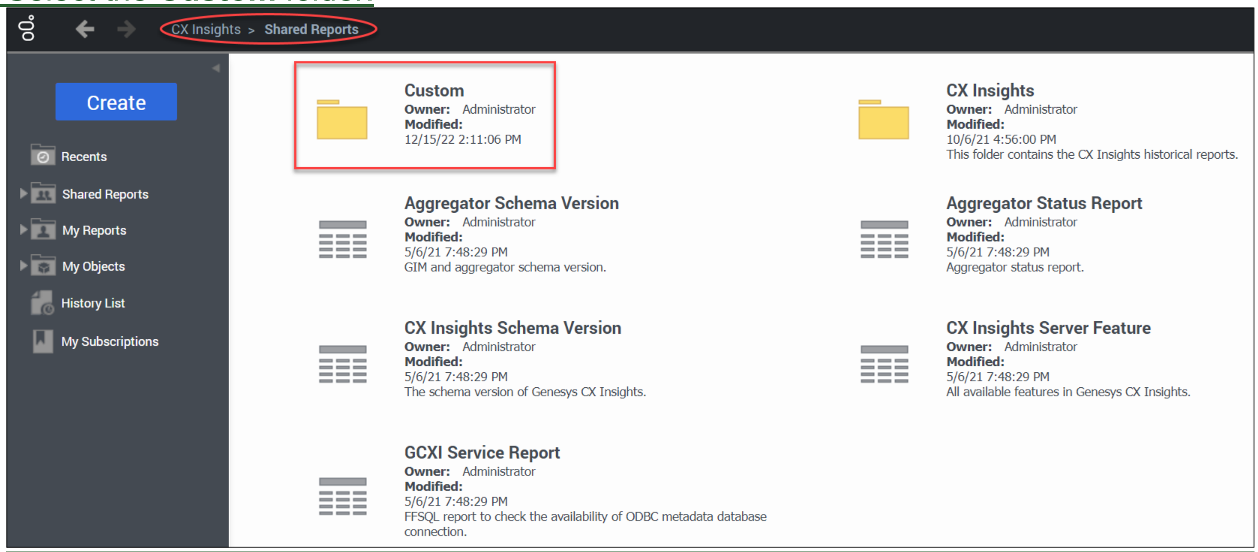
4. Warning message displays, select **continue**.



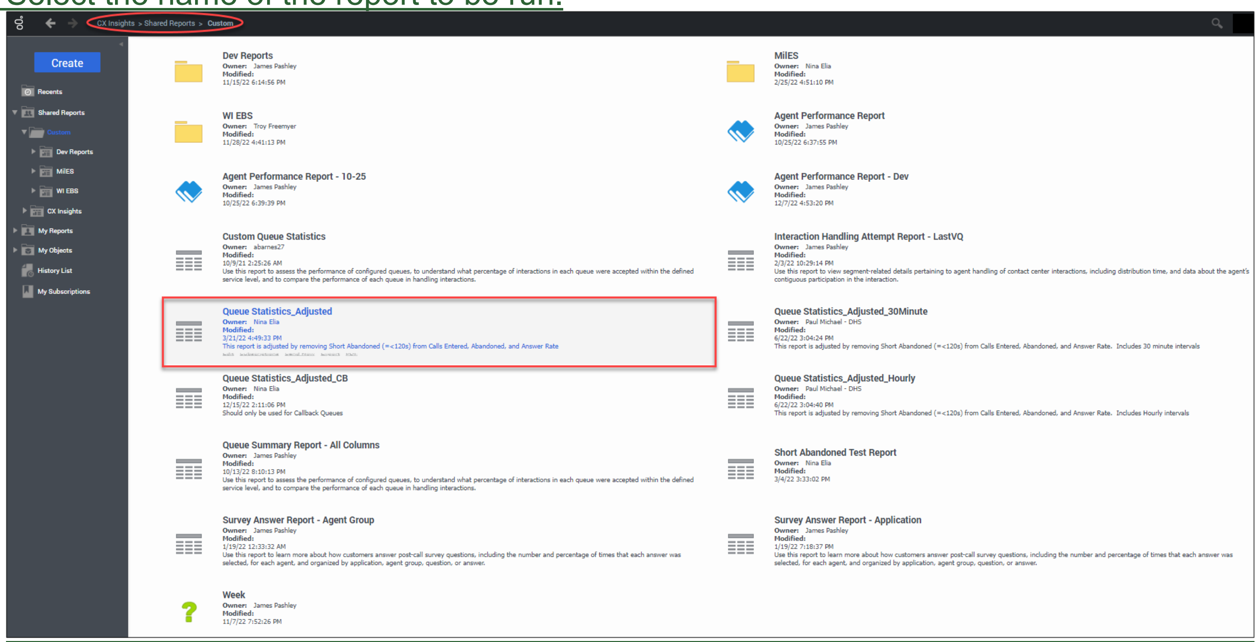
5. From CX Insights > Home page, navigate to the folder that contains the desired report.
 Select **Shared Reports** from the left menu or Browse section.



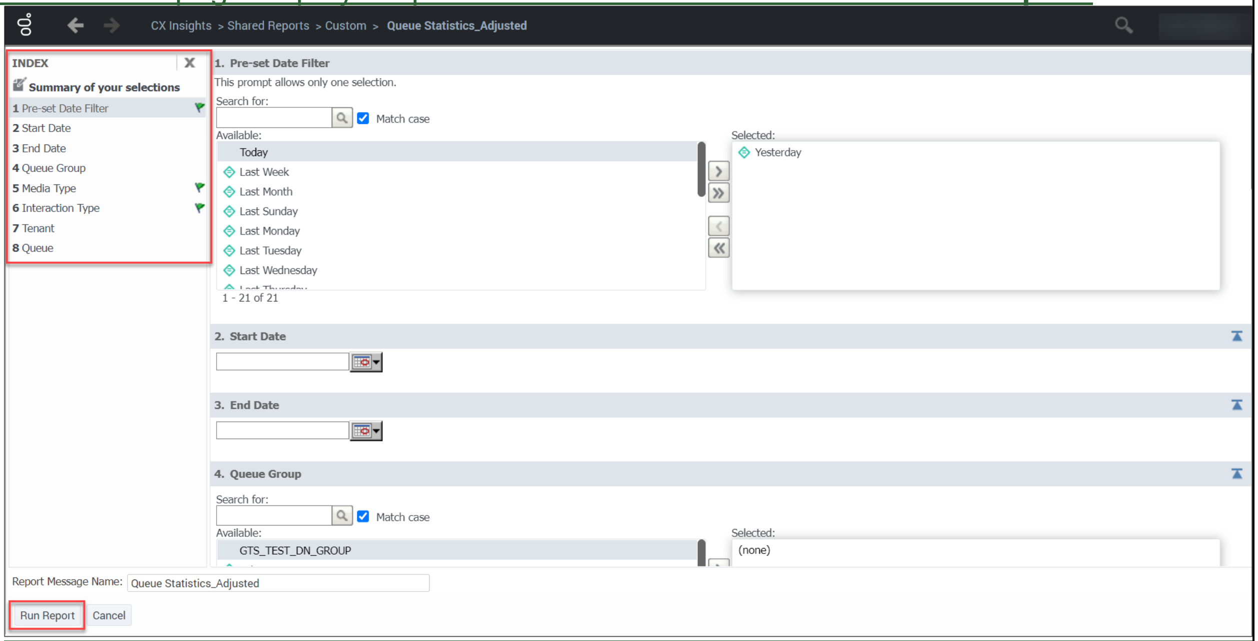
6. Select the **Custom** folder.



7. Select the name of the report to be run.

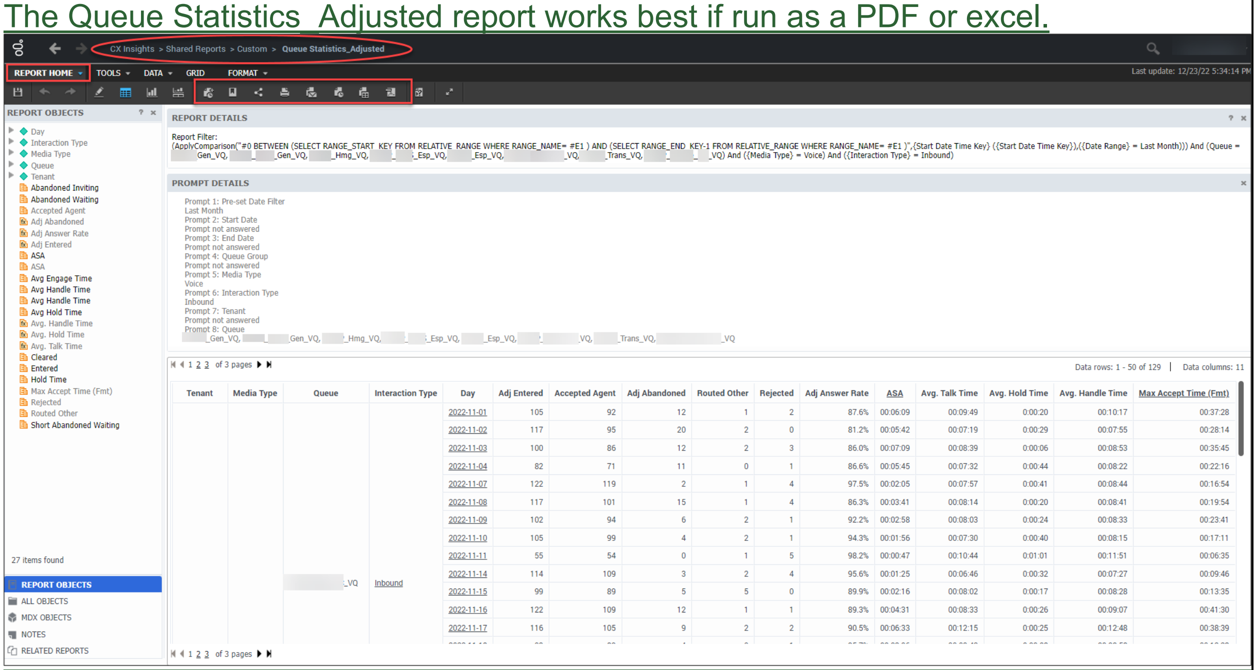


8. The INDEX page displays. Update the INDEX filters then select **Run Report**.



9. After selecting Run Report, the report is displayed. From the REPORT HOME tab there are additional features such as: Add to History List, Create Personal View, Share, Print, Send Now, Schedule Delivery to History LIst, Export or PDF.

The Queue Statistics_Adjusted report works best if run as a PDF or excel.



9.2.2 Creating Subscriptions

(Video instructions available: Creating Subscriptions)

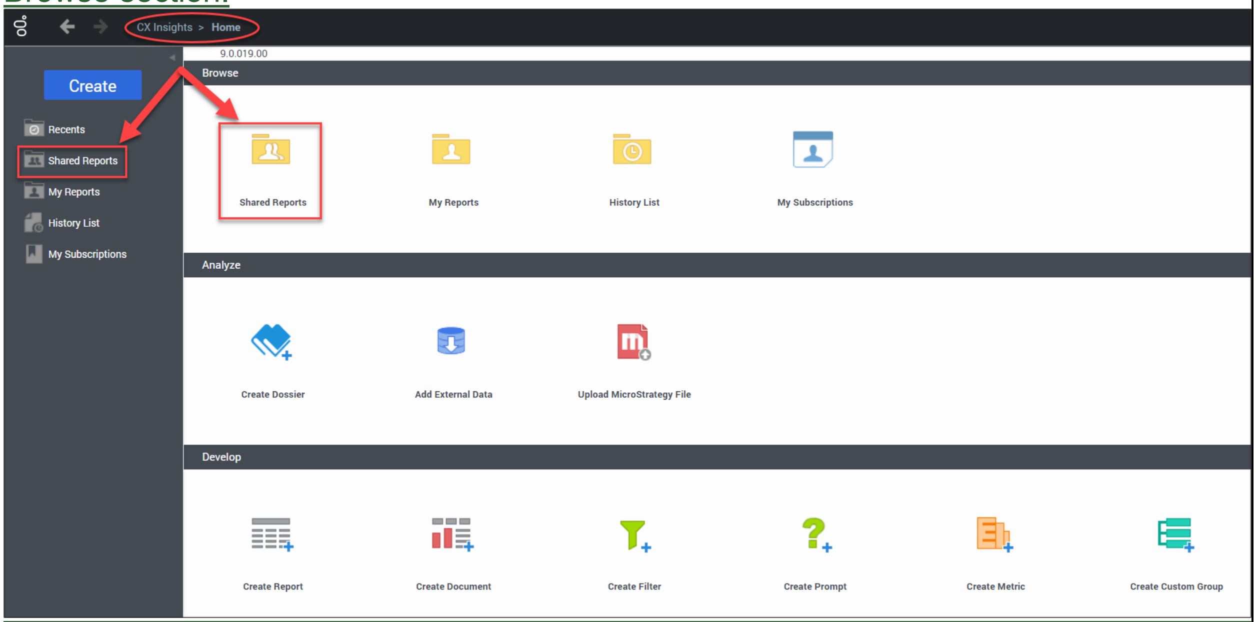
Reports can be delivered automatically to a History List Subscription or E-mail Subscription. Delivery of the reports can be scheduled to take place at regularly scheduled times or when a specific event occurs. To do this, a subscription to the desired report needs to be created.

History Lists are used to store reports that are generated on a specific schedule with saved filters selected by the user. The user can then go to their History List to view all the reports that have been run or have an email sent every time the report is run. The email contains a link to the report.

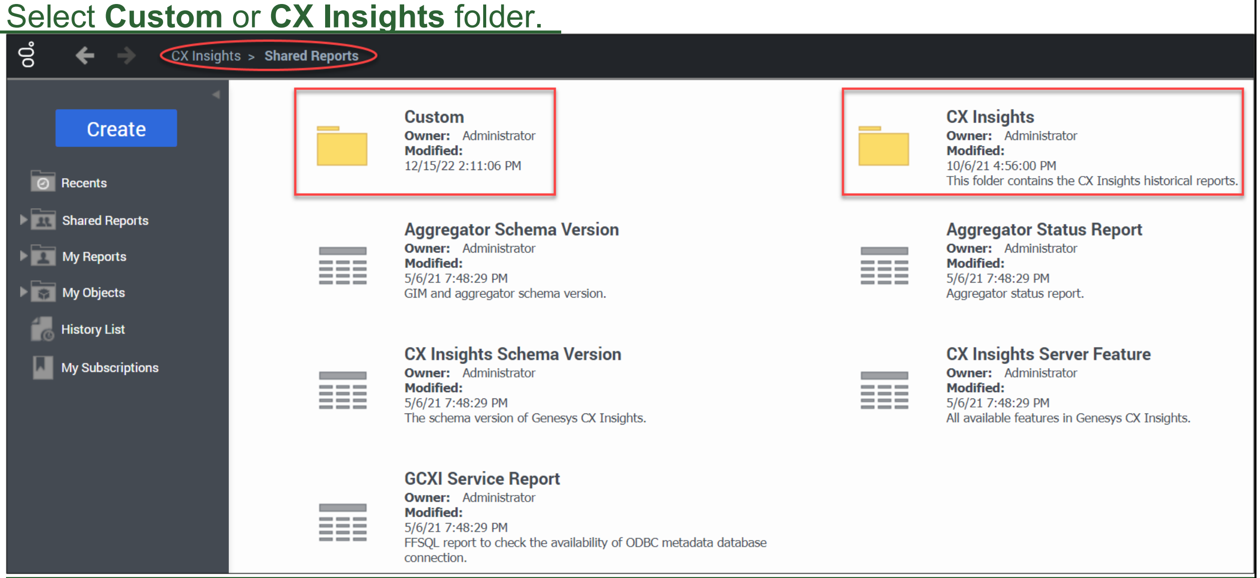
9.2.2.1 Email Subscription

To create an Email Subscription:

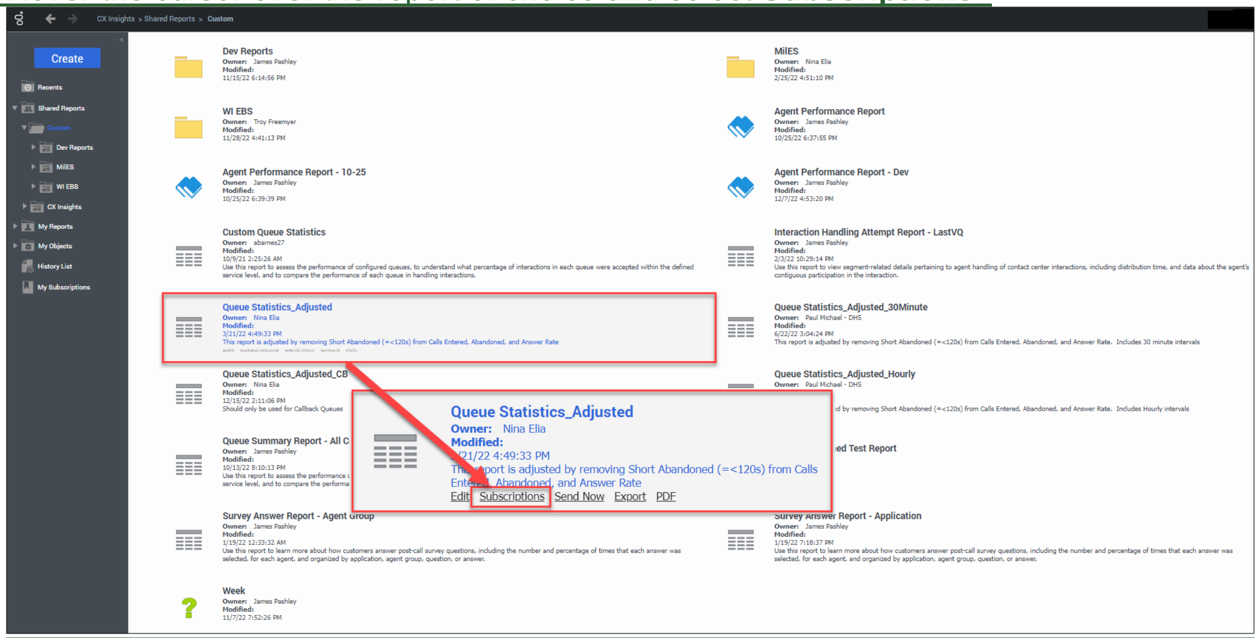
1. Go to CX Insights > Home page, select **Shared Reports** from the left menu or Browse section.



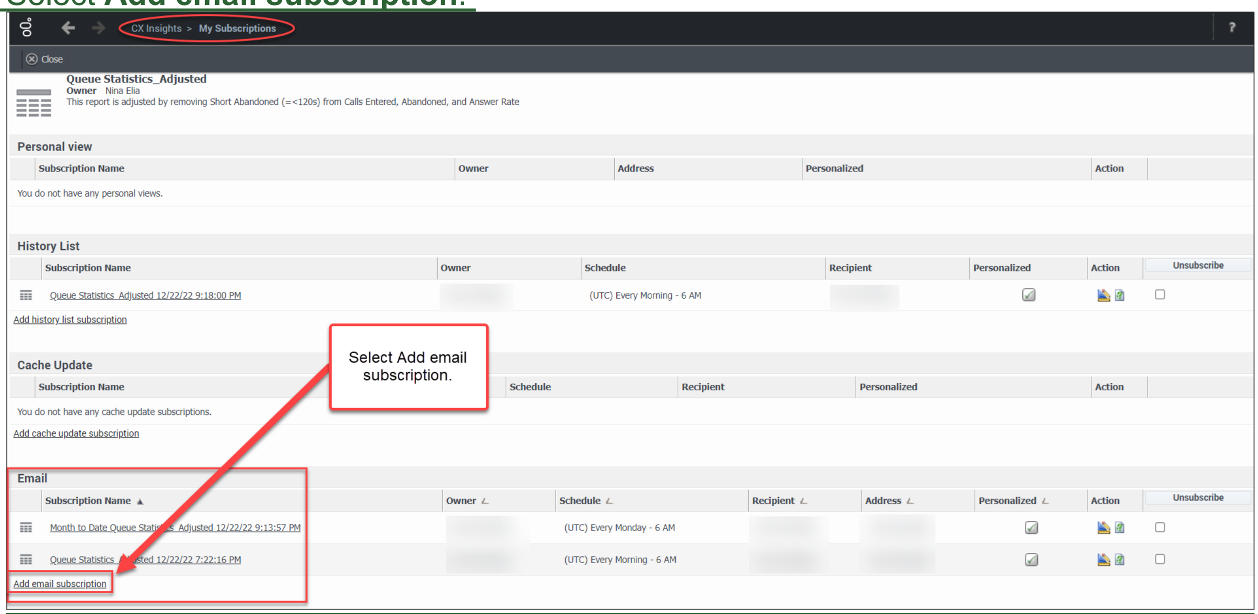
2. Select **Custom** or **CX Insights** folder.



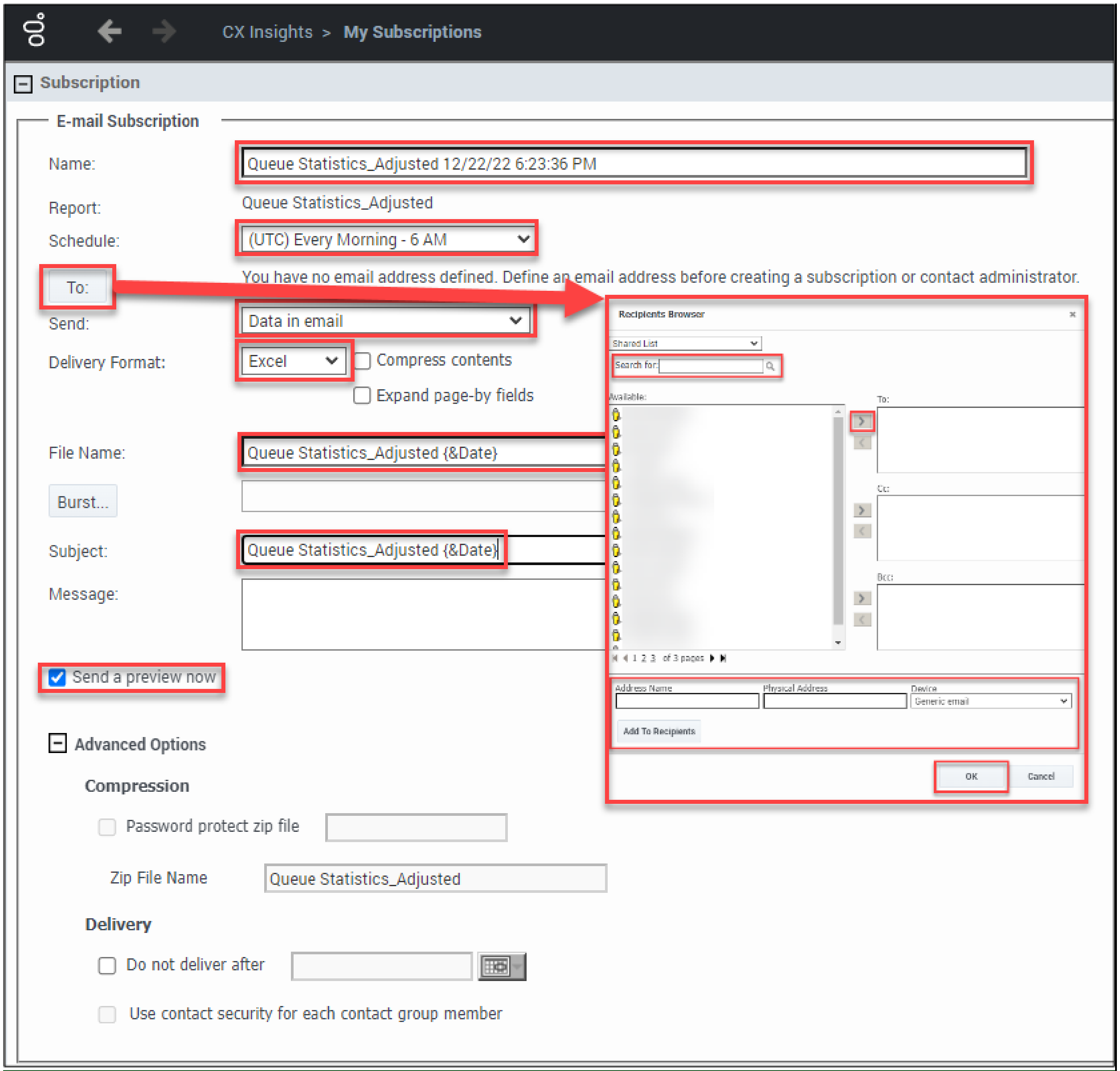
3. Hover the cursor over the report of choice and select **Subscriptions**.



4. Select **Add email subscription**.



5. Subscription page is displayed. User makes desired selections to the E-mail Subscription and Advanced Options.



When making selections on this page pay attention to the following fields:

a) **Name:** Enter a name for the subscription. The name of the subscription is for the user's reference and appears in "My Subscriptions" list. By default, the name of the generated report is displayed.
b) **Schedule:** From the drop down select a frequency of the report. Notice the time zone used to generate the subscription is based on Coordinated Universal Time (UTC). If "(UTC) Every Morning – 6AM" is selected the report is ready at midnight Central Standard Time (CST). Do not generate reports hourly.
c) **To:** Select this button to add recipients to the subscription. In the Recipients Browser, the user searches for recipients. If the recipient is not found the user can add the name of the recipient in the Address Name

field and the email address in the Physical Address Name field. The default “Generic Email” under Device can remain. Select the user and move to one of the following fields, To:, Cc:, BCC: and select **OK**. Multiple recipients can be added to each field.

d) **Send:** Default option, Data in email, is the preferred method.

e) **Delivery Format:** Preferred delivery format is Excel.

f) **File Name:** This field is editable and can be changed. Additional tags can be added to the file name, such as a date. To add the date, enter {&Date} after the file name. To view other available shortcuts hover over the blue details icon.

g) **Subject:** This field is editable and can be changed. Additional tags can be added to the subject, such as date. To add the date, enter {&Date} after the file name. Each time the report is generated and sent to the recipients email the date displayed at the end of the report name is the date the report is run not the date of the data. To view other available shortcuts hover over the blue details icon.

h) **Message:** Enter desired message or leave blank.

i) **Send a preview now:** To view the email immediately instead of waiting for the specified run time select this checkbox.

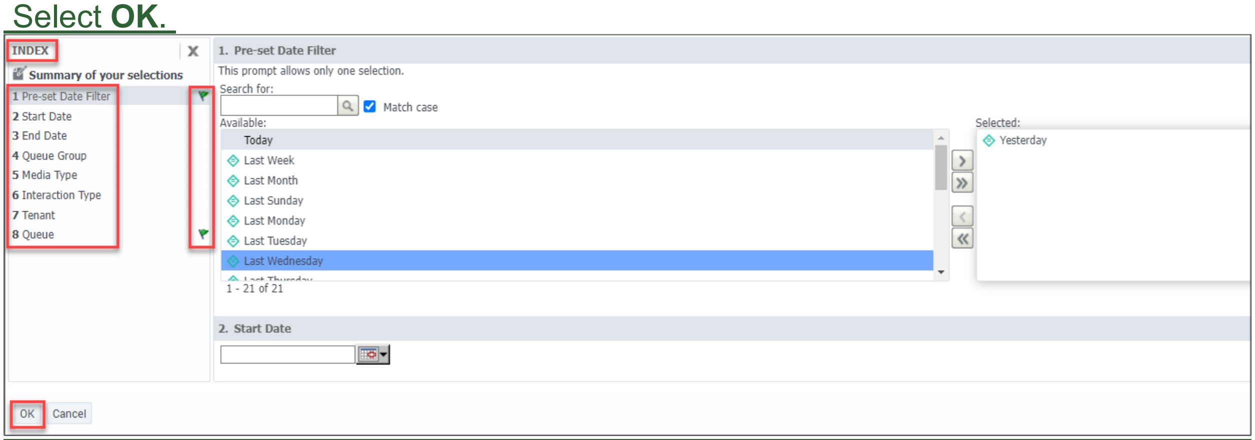
j) **Advanced Options:** Here the user can choose to send as a Zip password protected file. Since none of the reports contain PII it is not necessary to protect these files with a password.

6. Select filters in the INDEX section. There are eight prompt selections to choose filters for: Pre-set Date Filter, Start Date, End Date, Queue Group, Media Type, Interaction Type, Tenant, and Queue. Filters vary based on the chosen report.

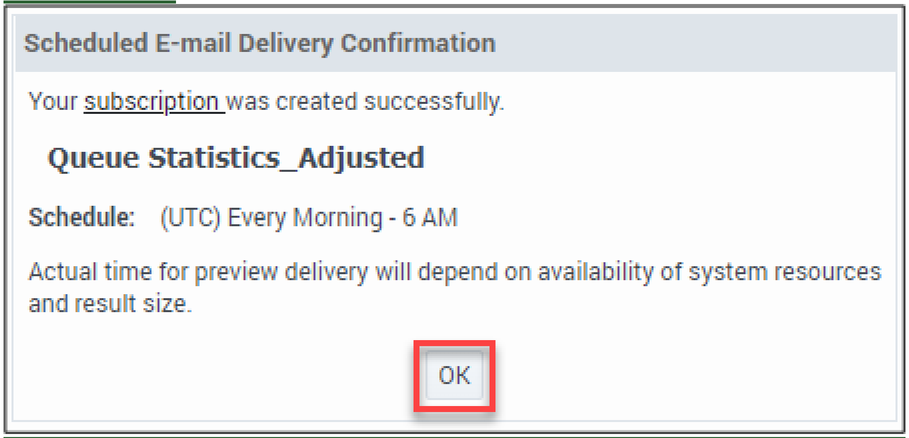
   Displayed green flag means there are filters chosen for that prompt.

   Search feature is case sensitive. Un-check **Match case** when using the search feature.

   Select **OK**.



7. Scheduled E-mail Delivery Confirmation window pops up. Select **OK**.



8. If the user selected the checkbox for "Send a preview now" an email is received immediately with a sample of the report. The user continues to receive the emailed report based on the times specified during creation of the subscription.

   Look for the following email from "MicroStrategy Distribution Services" <DistributionServices@MicroStrategy.com> if the email is not in the user's inbox, the user should check their spam folder. If there is still no email the user should contact their local IT department or submit a ticket to the Wisconsin Help Desk. See SECTION 11.6 SUBMITTING A GENESYS SUPPORT TICKET.

   The date displayed in the subject line and file name is the run date of the report. The actual date for the data pulled is found within the report under Day column.

9. The report arrives as an attachment in the email. The user opens the report.

Queue Statistics_Adjusted

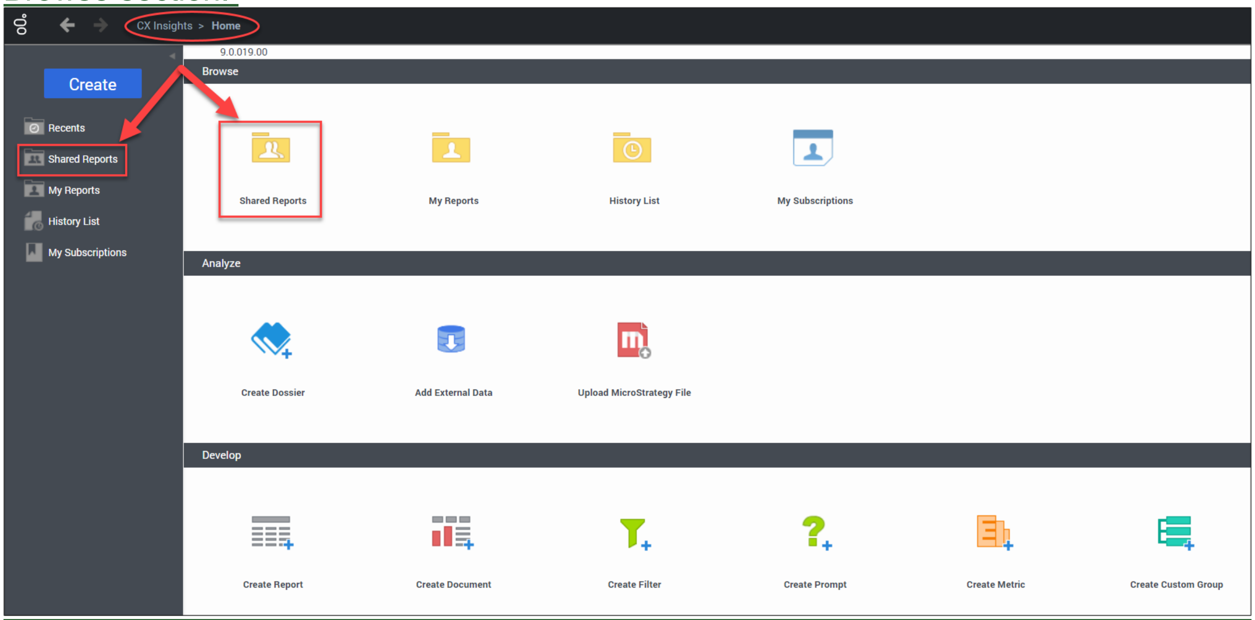
Tenant	Media Type	Queue	Interaction Type	Day	Adj Entered	Accepted Agent	Adj Abandoned	Routed Other	Rejected	Adj Answer Rate	ASA	Avg. Talk Time	Avg. Hold Time	Avg. Handle Time	Max Accept Time (Fmt)
Environment	Voice		Inbound	2022-12-21	109	97	11	1	6	89.0%	0:04:40	0:10:18	0:00:13	0:10:38	0:46:35
			Inbound	2022-12-21	37	34	2	1	0	91.9%	0:03:54	0:11:04	0:00:02	0:11:12	0:11:00
			Inbound	2022-12-21	2	2	0	0	0	100.0%	0:00:38	0:35:05	0:00:00	0:35:07	0:01:12
			Inbound	2022-12-21	422	391	29	2	4	92.7%	0:02:56	0:10:13	0:00:18	0:10:38	0:18:38
			Inbound	2022-12-21	15	15	0	0	0	100.0%	0:00:56	0:06:47	0:00:00	0:06:51	0:05:08
		Total			585	539	42	4	10	92.1%	0:03:14	0:10:17	0:00:16	0:10:39	0:46:35
	Total				585	539	42	4	10	92.1%	0:03:14	0:10:17	0:00:16	0:10:39	0:46:35
Total					585	539	42	4	10	92.1%	0:03:14	0:10:17	0:00:16	0:10:39	0:46:35

9.2.2.2 History List Subscription

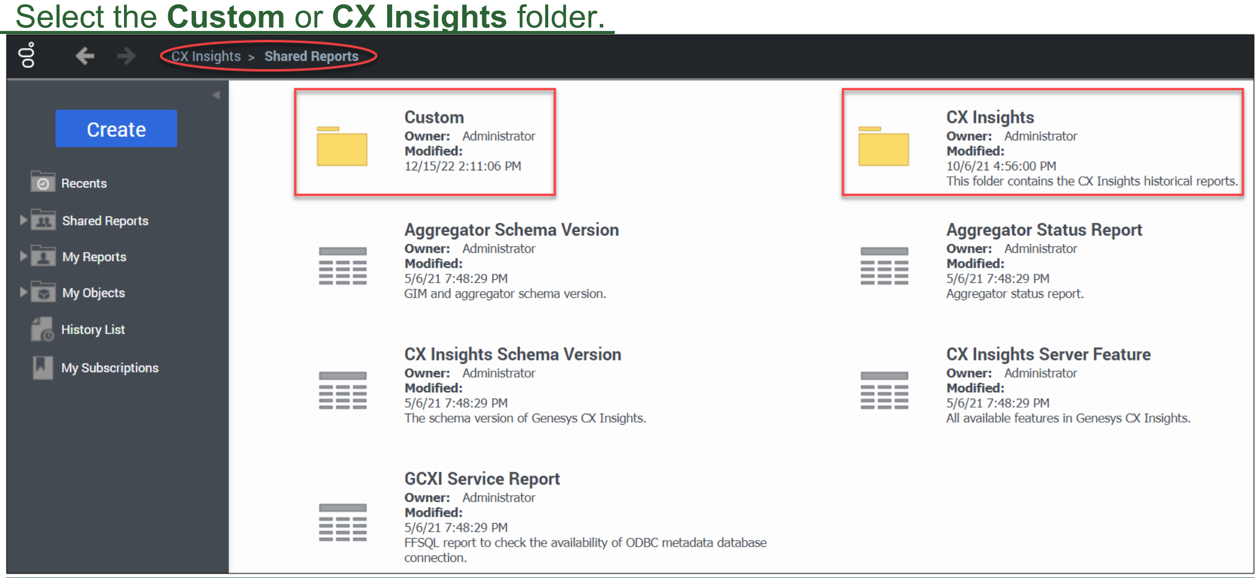
History list subscription saves a copy of the filtered report to the user's Reporting History List. The user can run the filtered report directly from the history list. A History List Subscription can be configured to send users an email every time the report is run. The email contains a link to the report.

To Create a History List Subscription:

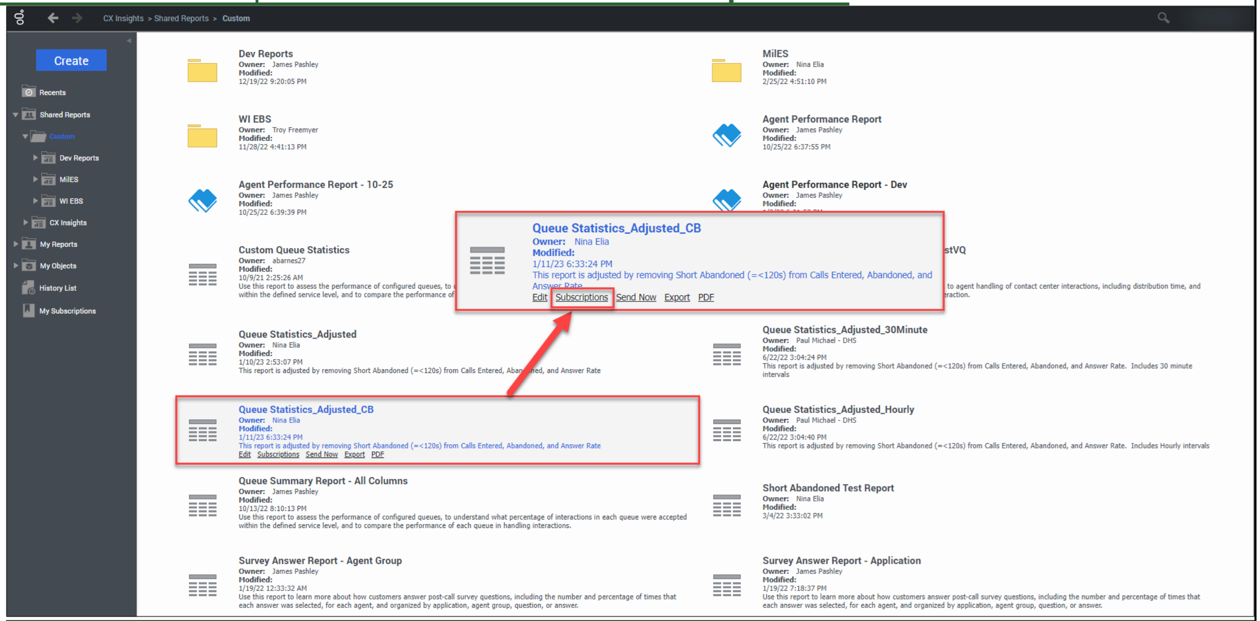
1. Go to CX Insights > Home page, select **Shared Reports** from the left menu or Browse section.



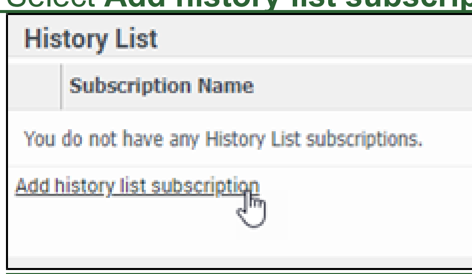
2. Select the **Custom** or **CX Insights** folder.



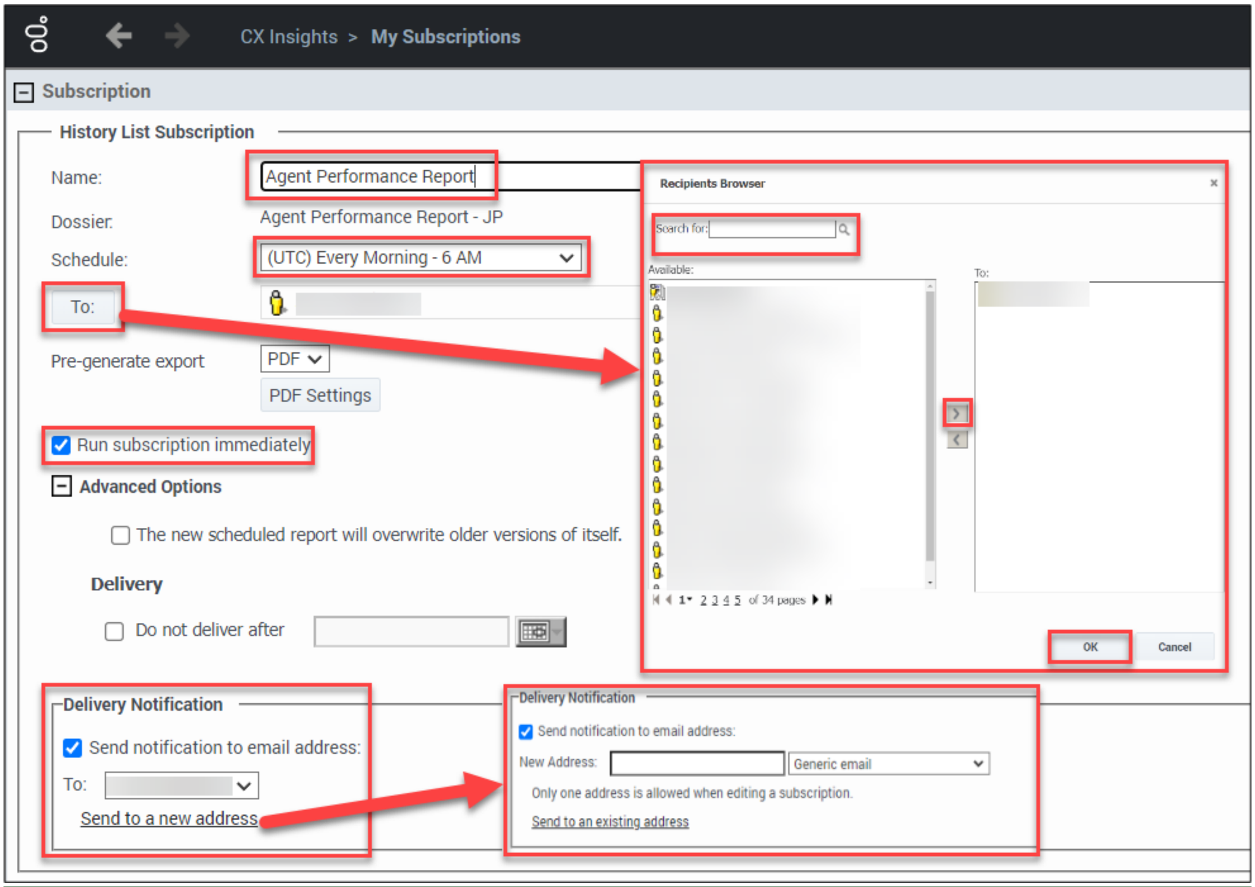
3. Hover over the report of choice and select **Subscriptions**.



4. Select **Add history list subscription**.



5. User makes desired selections to the History List Subscription and Advanced Options.



When making selections on this page pay attention to the following fields:

a) **Name:** enter a name for the subscription. This is the name of the subscription for the user's reference and appears in "My Subscriptions" list. By default, the name of the generated report is displayed.
b) **Schedule:** from the drop down select a frequency of the report. Notice the time zone used to generate the subscription is based on Coordinated Universal Time (UTC). If "(UTC) Every Morning – 6AM" is selected the report is ready at midnight Central Standard Time (CST). Do not generate reports hourly.
c) **To:** select this button to add recipients to the subscription.
d) **Run subscription immediately:** select this and the system delivers a test report immediately.
e) **Delivery Notification:** to have a notification email sent when the report or document is delivered, select the "Send notification to email address" checkbox, then do one of the following:

    i. To send the notification to an email address that has already been defined, select an address from the "To" drop down list.
    ii. To send the notification to a new email address, in the New Address field, type the email address of the user to send a delivery

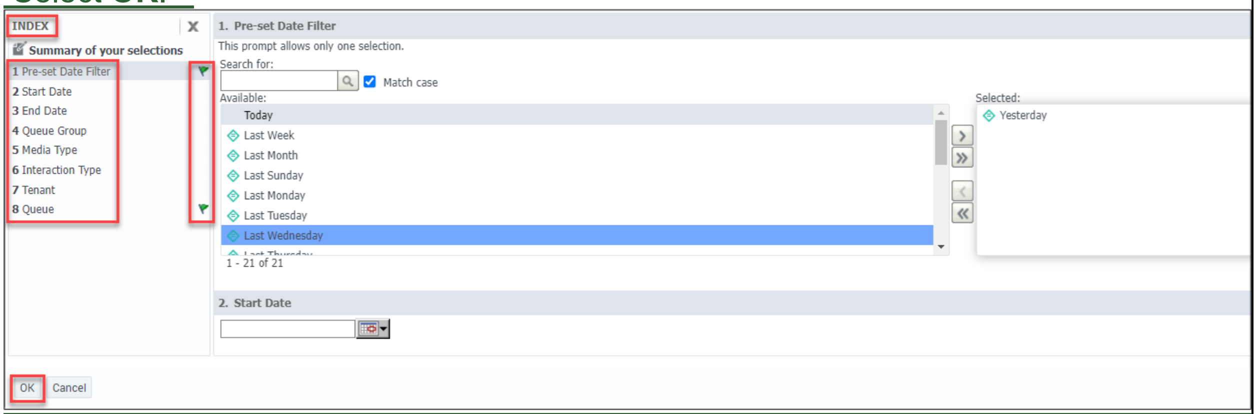
notification to and select the email client type of the specified email address from the drop-down list.

6. Select filters in the INDEX section. There are eight prompt selections to choose filters for: Pre-set Date Filter, Start Date, End Date, Queue Group, Media Type, Interaction Type, Tenant, and Queue. Filters may vary based on the chosen report.

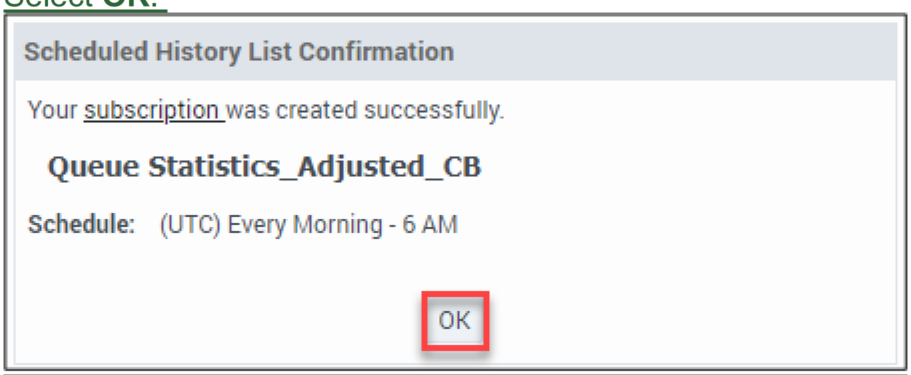
   Displayed green flag means, there are filters chosen for that prompt.

   Search feature is case sensitive. Uncheck “Match case” when using the search feature.

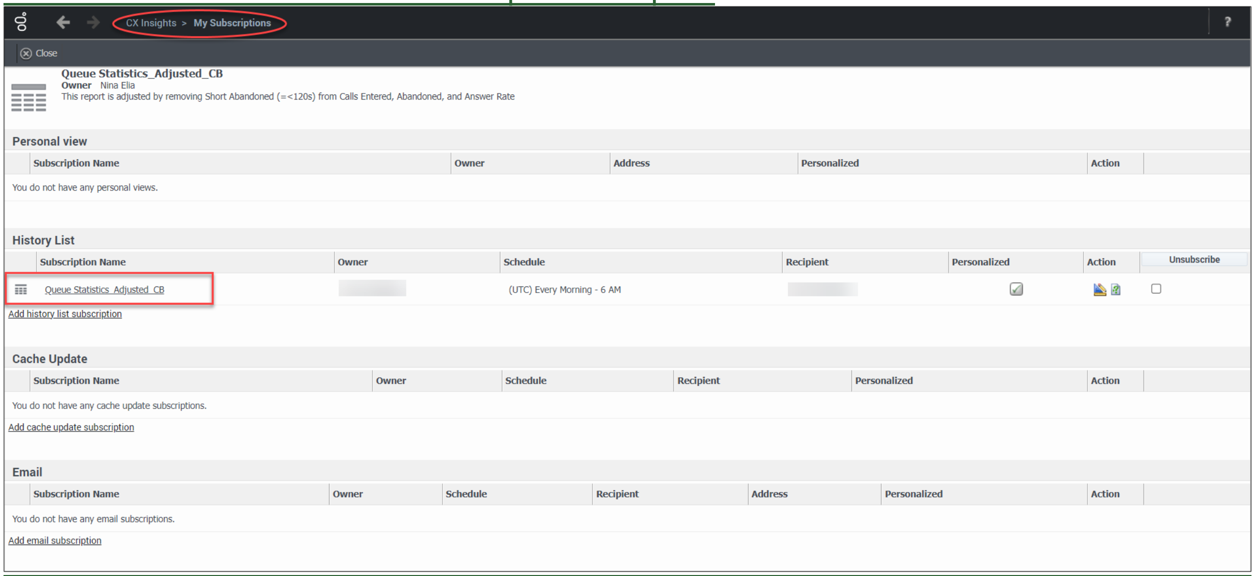
   Select **OK**.



7. Once the subscription is created the user receives the following pop-up window. Select **OK**.

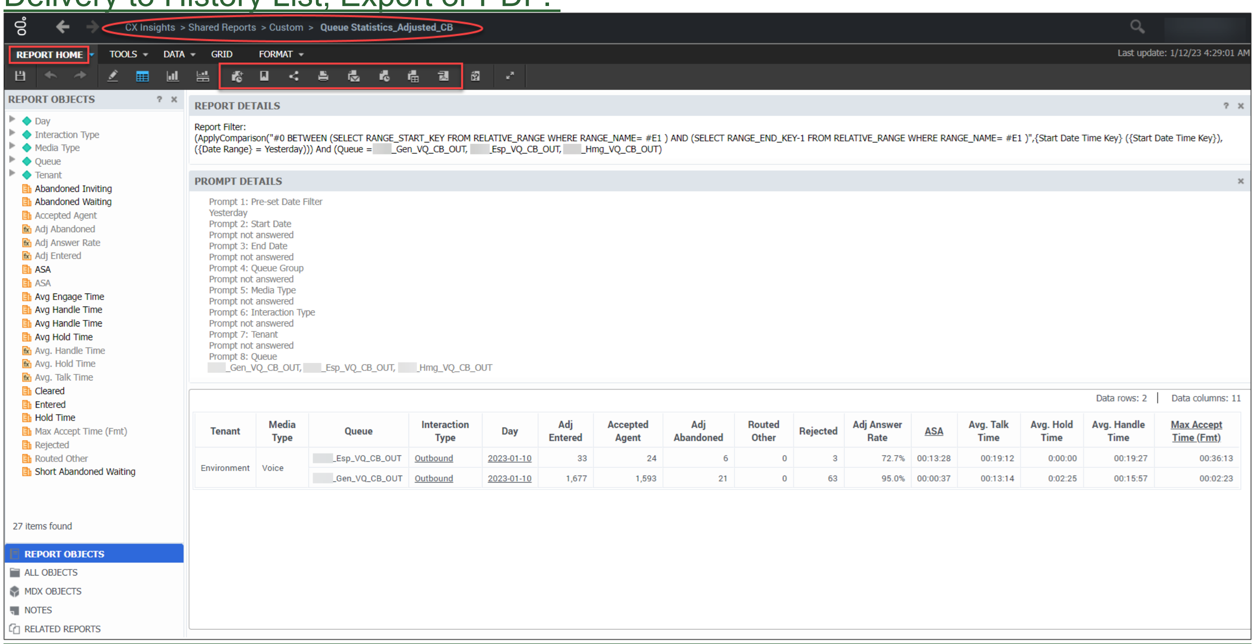


8. The CX Insights > My Subscriptions page is displayed. The subscription appears and the user can select the link to open the report.



9. From the REPORT HOME tab there are additional features:

Add to History List, Create Personal View, Share, Print, Send Now, Schedule Delivery to History List, Export or PDF.

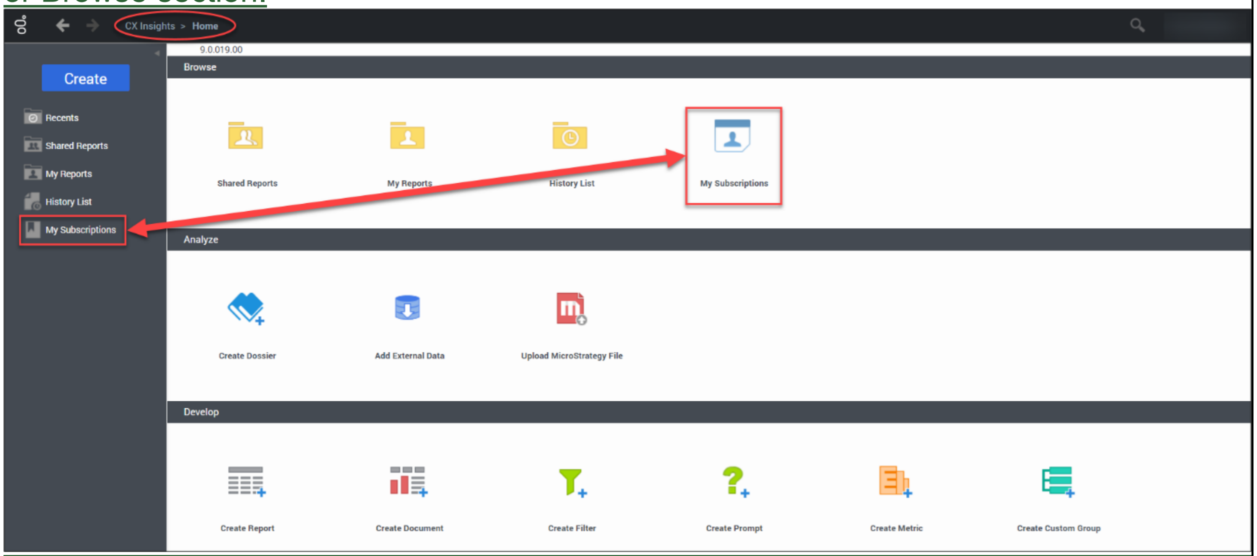


The Queue Statistics_Adjusted_CB report works best if exported as an excel document.

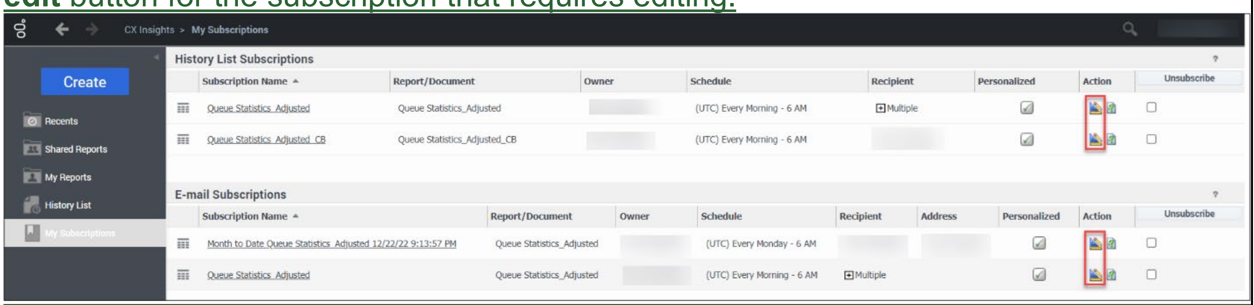
9.2.3 Editing Subscriptions

(Video instructions available: Editing Subscriptions)

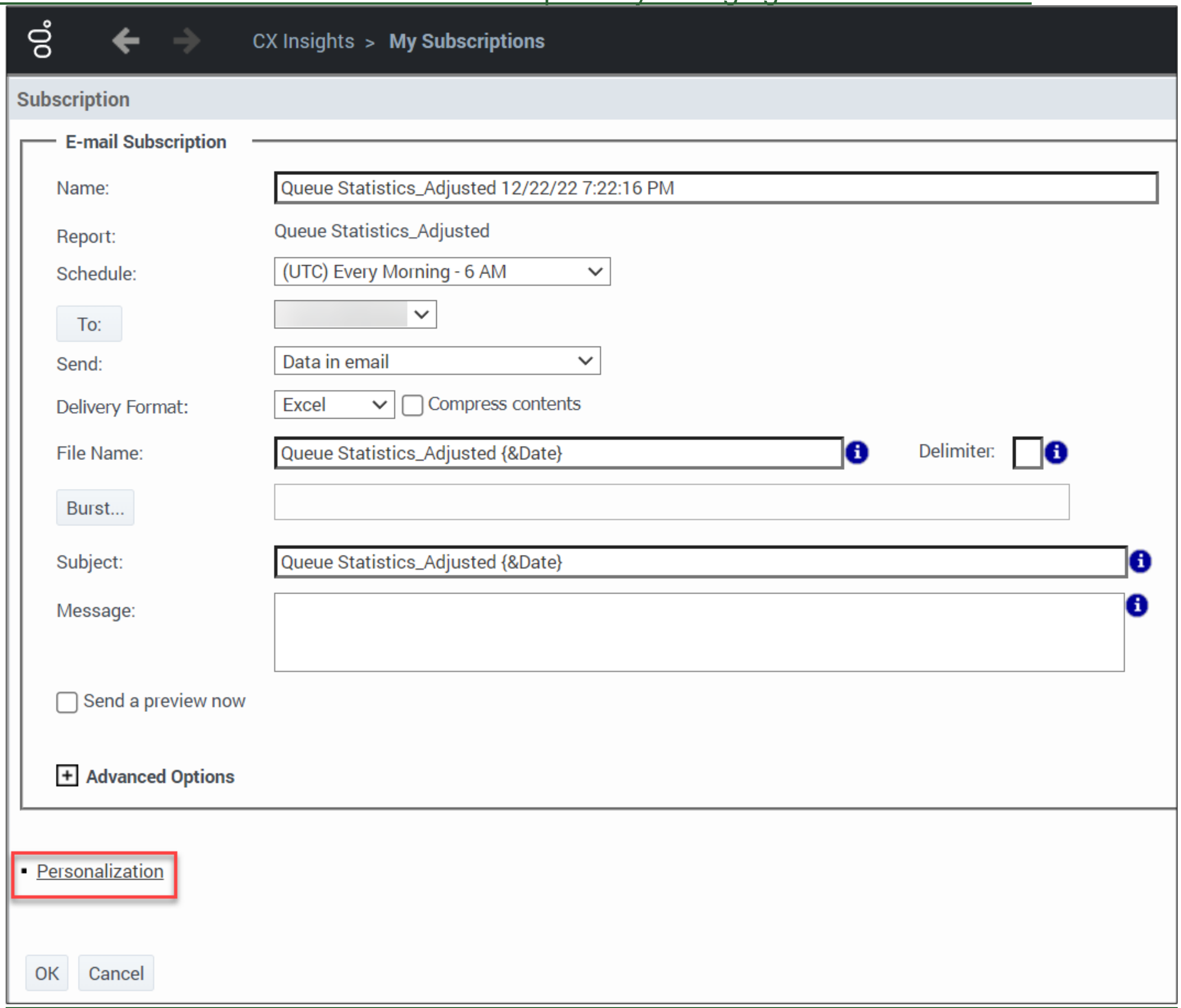
1. From the CX Insights > Home page, select **My Subscriptions** from the left menu or Browse section.



2. My Subscriptions displays a list of reports the user is subscribed to. Select the **edit** button for the subscription that requires editing.

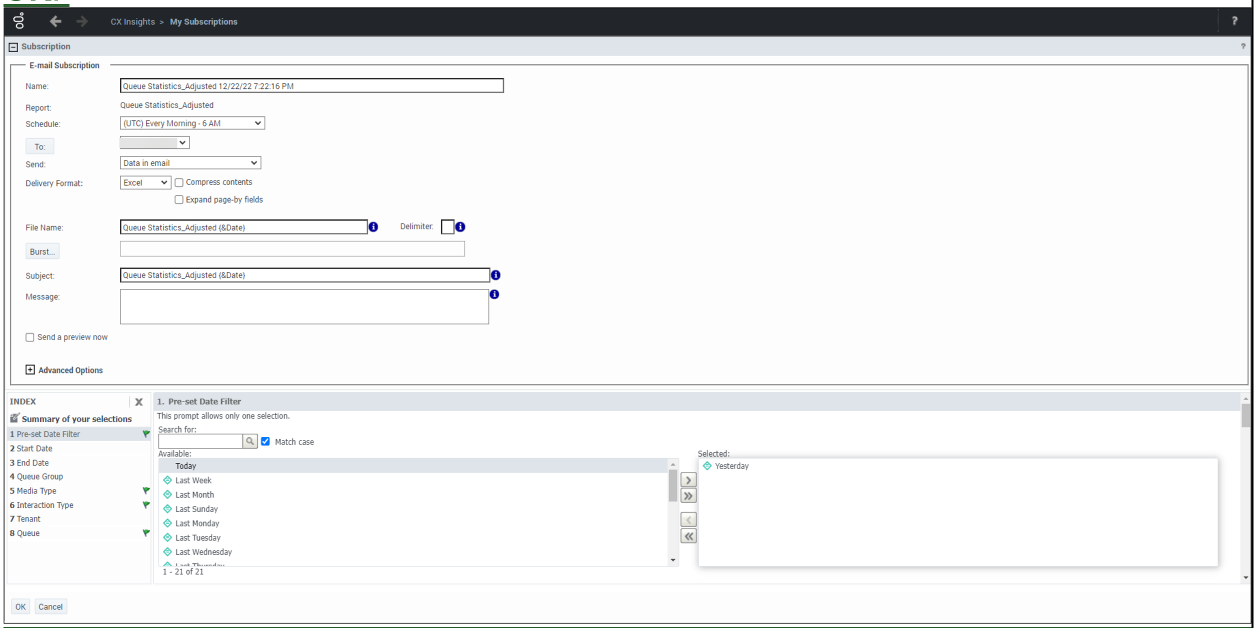


3. Edits can be made to the current subscription by changing the desired fields.



4. To change previously selected filter options, open the Personalization link. Filter selections can be changed in the INDEX section. After edits are complete select

OK.

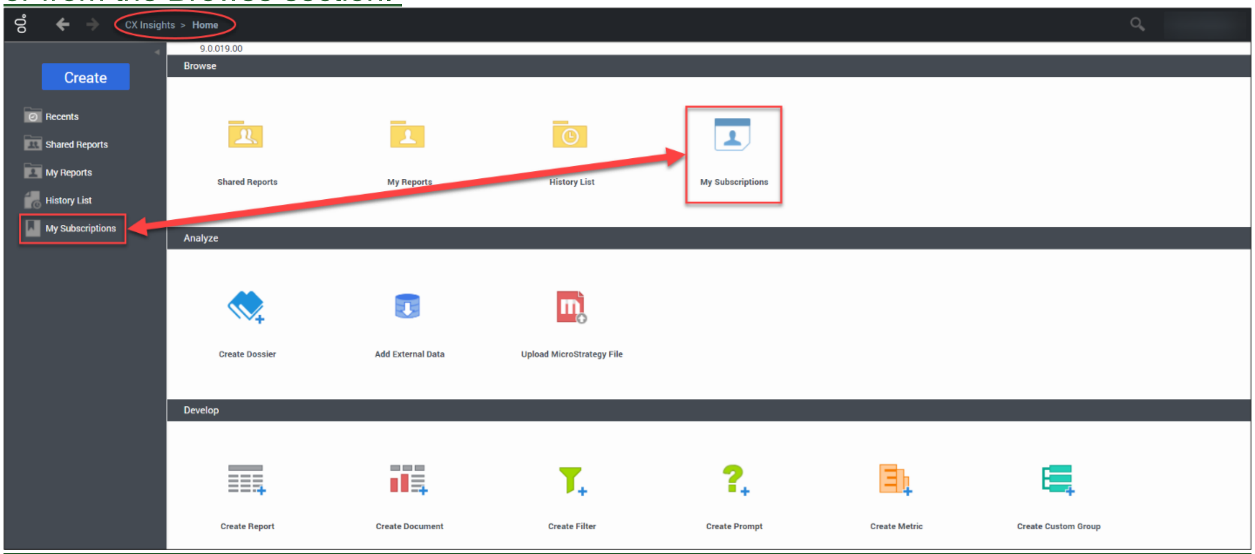


CX Insights > My Subscriptions
Subscription
E-mail Subscription
Name: Queue Statistics_Adjusted 12/22/22 7:22:16 PM
Report: Queue Statistics_Adjusted
Schedule: (UTC) Every Morning - 6 AM
To:
Send: Data in email
Delivery Format: Excel
Compress contents
Expand page-by fields
File Name: Queue Statistics_Adjusted (&Date)
Delimiter:
Burst...
Subject: Queue Statistics_Adjusted (&Date)
Message:
Send a preview now
Advanced Options
INDEX
Summary of your selections
1 Pre-set Date Filter
2 Start Date
3 End Date
4 Queue Group
5 Media Type
6 Interaction Type
7 Tenant
8 Queue
1. Pre-set Date Filter
This prompt allows only one selection.
Search for:
Match case
Available:
Today
Last Week
Last Month
Last Sunday
Last Monday
Last Tuesday
Last Wednesday
1 - 21 of 21
Selected:
Yesterday
OK
Cancel

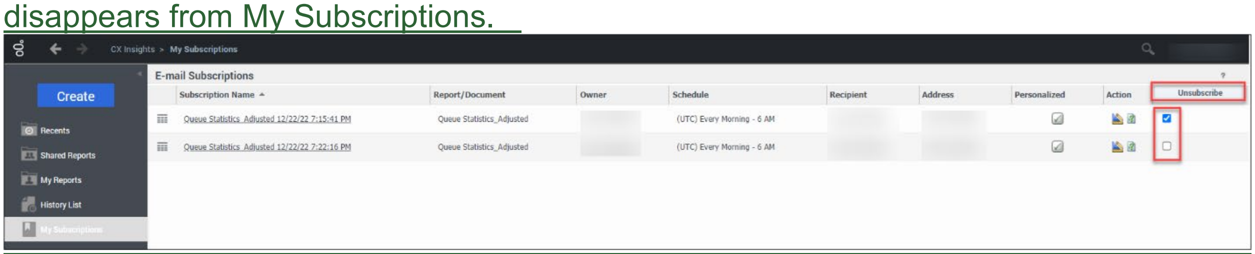
9.2.4 Unsubscribing from Subscriptions

(Video instructions available: Unsubscribing from Subscriptions)

1. From the CX Insights > Home page select **My Subscriptions** from the left menu or from the Browse section.



2. To unsubscribe select the **Unsubscribe checkbox** in the row of the subscription no longer desired. Then select the **Unsubscribe** button. The subscription disappears from My Subscriptions.



9.2.5 Recommended Queue and Agent Reports

There are three custom reports that can assist in monitoring agent and queue performance. The three reports are:

- Agent Performance Report V2.0 (see Section 9.2.5.1 Agent Performance Report V2.0)
- Queue Statistics_Adjusted (also available in 30 minute and hourly intervals) (see Section 9.2.5.2 Queue Statistics_Adjusted)
- Queue Statistics_Adjusted_CB (Callback) (only available in hourly intervals) (see Section 9.2.5.3 Queue Statistics_Adjusted_CB)

9.2.5.1 Agent Performance Report V2.0

Agent performance report gives a summary and daily detail of agent performance statistics. This report is only recommended as a History List Subscription. See Section 9.2.2.2 HISTORY LIST SUBSCRIPTION~~Coming Soon~~

with details on how to subscribe to a history list.

The agent performance report has two tabs:

- Agent Performance – Summary tab provides a summary of agent performance statistics.
  Show/Hide an example of this report

Agent Performance Report 2.0 - Summary

Agent Name	Accepted - Total	Accepted - Inbound	Not Accepted	ACD Handle Time (Mins)	ACD Talk Time (Mins)	ACD Hold Time (Mins)	ACD Wrap Time (Mins)	Avg ACD Handle Time (Mins)	Avg ACD Talk Time (Mins)	Avg ACD Hold Time (Mins)	Avg ACD Wrap Time (Mins)	ACD Talk Time %	ACD Hold Time %	ACD Wrap Time %	Accepted - Outbound	Out Handle Time (Mins)	Out Talk Time (Mins)
	42	34	3	205.57	167.00	33.38	5.18	6.05	4.91	0.98	0.15	81.24%	16.24%	2.52%	8	10.37	10.37
	0	0	0	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00%	0.00%	0.00%	0	0.00	0.00
	0	0	0	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00%	0.00%	0.00%	0	0.00	0.00
	38	22	0	122.83	103.92	15.02	3.90	5.58	4.72	0.68	0.18	84.60%	12.23%	3.18%	16	19.22	19.22
	20	12	0	212.65	211.90	0.00	0.75	17.72	17.66	0.00	0.06	99.65%	0.00%	0.35%	8	74.05	74.05
	22	21	0	542.57	460.87	80.42	1.28	25.84	21.95	3.83	0.06	84.94%	14.82%	0.24%	1	9.75	9.75
	33	24	0	346.47	342.45	0.00	4.02	14.44	14.27	0.00	0.17	98.84%	0.00%	1.16%	9	14.32	14.32
	31	14	0	270.17	268.95	0.00	1.22	19.30	19.21	0.00	0.09	99.55%	0.00%	0.45%	17	136.67	136.67
	44	23	0	129.40	127.43	0.00	1.97	5.63	5.54	0.00	0.09	98.48%	0.00%	1.52%	21	52.03	52.03
	33	24	0	271.07	269.80	0.00	1.27	11.29	11.24	0.00	0.05	99.53%	0.00%	0.47%	9	73.97	73.97

Agent Performance - Summary ⋮ | Agent Performance - Daily | + Page

- Agent Performance – Daily tab provides agent performance statistics day over day.
  Show/Hide an example of this report

Agent Performance Report 2.0 - Daily Totals

Agent Name	Day	Accepted - Total	Accepted - Inbound	Not Accepted	ACD Handle Time (Mins)	ACD Talk Time (Mins)	ACD Hold Time (Mins)	ACD Wrap Time (Mins)	Avg ACD Handle Time (Mins)	Avg ACD Talk Time (Mins)	Avg ACD Hold Time (Mins)	Avg ACD Wrap Time (Mins)	ACD Talk Time %	ACD Hold Time %	ACD Wrap Time %
Total		1,442	1,103	19	13,261.77	12,708.1	439.95	113.72	12.02	11.52	0.40	0.10	95.83%	3.32%	0.86%
	Total	42	34	3	205.57	167.00	33.38	5.18	6.05	4.91	0.98	0.15	81.24%	16.24%	2.52%
	2023-02-01	20	20	2	91.53	77.35	11.53	2.65	4.58	3.87	0.58	0.13	84.50%	12.60%	2.90%
	2023-02-02	22	14	1	114.03	89.65	21.85	2.53	8.15	6.40	1.56	0.18	78.62%	19.16%	2.22%
	Total	0	0	0	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00%	0.00%	0.00%
	2023-02-01	0	0	0	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00%	0.00%	0.00%
	Total	0	0	0	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00%	0.00%	0.00%
	2023-02-02	0	0	0	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00%	0.00%	0.00%
	Total	38	22	0	122.83	103.92	15.02	3.90	5.58	4.72	0.68	0.18	84.60%	12.23%	3.18%
	2023-02-01	19	11	0	67.50	60.10	5.53	1.87	6.14	5.46	0.50	0.17	89.04%	8.20%	2.77%
	2023-02-02	19	11	0	55.33	43.82	9.48	2.03	5.03	3.98	0.86	0.18	79.19%	17.14%	3.67%
	Total	20	12	0	212.65	211.90	0.00	0.75	17.72	17.66	0.00	0.06	99.65%	0.00%	0.35%
	2023-02-01	8	5	0	140.55	140.17	0.00	0.38	28.11	28.03	0.00	0.08	99.73%	0.00%	0.27%
	2023-02-02	12	7	0	72.10	71.73	0.00	0.37	10.30	10.25	0.00	0.05	99.49%	0.00%	0.51%
	Total	22	21	0	542.57	460.87	80.42	1.28	25.84	21.95	3.83	0.06	84.94%	14.82%	0.24%
	2023-02-01	10	10	0	284.97	240.97	43.50	0.50	28.50	24.10	4.35	0.05	84.56%	15.26%	0.18%
	2023-02-02	12	11	0	257.60	219.90	36.92	0.78	23.42	19.99	3.36	0.07	85.36%	14.33%	0.30%
	Total	33	24	0	346.47	342.45	0.00	4.02	14.44	14.27	0.00	0.17	98.84%	0.00%	1.16%
	2023-02-01	13	13	0	202.12	199.55	0.00	2.57	15.55	15.35	0.00	0.20	98.73%	0.00%	1.27%
	2023-02-02	20	11	0	144.35	142.90	0.00	1.45	13.12	12.99	0.00	0.13	99.00%	0.00%	1.00%
	Total	31	14	0	270.17	268.95	0.00	1.22	19.30	19.21	0.00	0.09	99.55%	0.00%	0.45%

Agent Performance - Summary | Agent Performance - Daily | + Page

This report can be found in Historical Reporting: Shared Reports > Custom > Agent Performance Report V2.0

Basic Terminology

Interactive Voice Response (IVR)	Refers to the call flow that an inbound call comes through
Automated Call Distribution (ACD)	Inbound calls coming from the IVR Queues
Busy Time	Refers to any time an agent is logged in AND, in any state, other than a "Not Ready" state, excluding Extended After Call Work (that is, Extended After Call Work is included in Busy Time)
After Call Work (ACW) or "Wrap"	The automatic timed state an agent is in immediately following handling an ACD or Callback call. Also referred to as "wrap"

Statistics Definitions

Statistic Name	Description	Format
Accepted – Total	Total calls accepted inbound and outbound	Count

Accepted Inbound	Total inbound calls (via the IVR) answered by the agent	Count
Not Accepted	Total calls offered to the agent that were not answered	Count
ACD Handle Time (Mins)	Total minutes of inbound handle time Talk+Hold+ACW (wrap)	Minutes
ACD Talk Time (Mins)	Total inbound talk time (excludes hold time)	Minutes
ACD Hold Time (Mins)	Total inbound hold time	Minutes
ACD Wrap Time (Mins)	Total inbound wrap time (timed ACW)	Minutes
Avg ACD Handle Time (Mins)	*(Total ACD Handle Time) / (Total ACD accepted calls)*	Minutes
Avg ACD Talk Time (Mins)	*(Total ACD Talk Time) / Total ACD accepted calls* Average talk time for each call	Minutes
Avg ACD Hold Time (Mins)	*(Total ACD Hold Time) / (Total ACD accepted calls)* Average hold time for each call	Minutes
Avg ACD Wrap Time (Mins)	*(Total ACD Wrap Time) / (Total ACD accepted calls)* Average wrap time for each call	Minutes
% ACD Talk Time	*(Total ACD Talk Time) / (Total ACD Handle Time)* Talk time, as a percentage of handle time	Percent
% ACD Hold Time	*(Total ACD Hold Time) / (Total ACD Handle Time)* Hold time, as a percentage of handle time	Percent
% ACD Wrap Time	*(Total ACD Wrap Time) / (Total ACD Handle Time)*	Percent

	Wrap time, as a percentage of handle time	
Accepted Outbound	Total outbound calls (including callback calls) made/answered by the agent	Count
Out Handle Time (Mins)	Total minutes of outbound handle time Talk+Hold+After Call Work (wrap)	Minutes
Out Talk Time (Mins)	Total outbound talk time (excludes hold time)	Minutes
Out Hold Time (Mins)	Total outbound hold time	Minutes
Out Wrap Time (Mins)	Total outbound wrap time (timed after call work)	Minutes
Avg Out Handle Time (Mins)	*(Total Out Handle Time) / (Total Out accepted calls)*	Minutes
Avg Out Talk Time (Mins)	*(Total Out Talk Time) / (Total Out accepted calls)* Average talk time for each call	Minutes
Avg Out Hold Time (Mins)	*(Total Out Hold Time) / (Total Out accepted calls)* Average hold time for each call	Minutes
Avg Out Wrap Time (Mins)	*(Total Out Wrap Time) / (Total Out accepted calls)* Average wrap time for each call	Minutes
Calls per Busy Hour	Number of calls handled for every hour the agent is something other than a “Not Ready” state.	Count
Extended ACW Per Call (Mins)	*(Total Extended ACW) / (Total ACD Calls)*	Minutes
Login Time (Hrs)	Total time agent was logged into the system	Hours
Busy Time (Hrs)	*Login Time - Not Ready Time* Total time on calls or waiting for calls	Hours

Ready Time (Hrs)	Total time agent was in a “Ready” state	Hours
Wrap Time (Hrs)	Total time agent was in ACW state	Hours
Not Ready Time (Hrs)	Total time an agent was in any “Not Ready” state- Regardless of reason code	Hours
Not Ready- <<Reason Code>> (Hrs)	Separate stat for each reason code Total time an agent was in each Not Ready reason code	Hours
Busy Time	Refers to any time an agent is logged in AND, in any state, other than a “Not Ready” state, excluding Extended After Call Work (that is, Extended After Call Work is included in Busy Time)	Hours

9.2.5.2 Queue Statistics_Adjusted

The Queue Statistics_Adjusted report provides details of the queue statistics, specific to inbound queues.

This report is adjusted by removing Short Abandoned (=<120s) from Calls Entered, Abandoned, and Answer Rate

This report can be found in Historical Reporting: Shared Reports > Custom > Queue Statistics_Adjusted

Queue Statistics_Adjusted

Tenant	Media Type	Queue	Interaction Type	Day	Adj Entered	Accepted Agent	Adj Abandoned	Routed Other	Rejected	Adj Answer Rate	ASA	Avg. Talk Time	Avg. Hold Time	Avg. Handle Time	Max Accept Time (Fmt)
Environment	Voice	EBD_LTC_VQ	Inbound	2023-01-12	114	105	8	1	0	92.1%	00:02:50	00:09:53	0:00:24	00:10:24	00:23:08
		Esp_VQ	Inbound	2023-01-12	29	27	2	0	0	93.1%	00:03:04	00:15:36	0:00:17	00:15:57	00:11:14
		_FSPS_Gen_VQ	Inbound	2023-01-12	3	3	0	0	0	100.0%	00:01:40	00:15:19	0:00:00	00:15:23	00:03:37
		_Gen_VQ	Inbound	2023-01-12	660	445	211	4	7	67.4%	00:20:00	00:11:55	0:00:22	00:12:23	00:52:29
		CC_VQ	Inbound	2023-01-12	20	16	4	0	1	80.0%	00:06:09	00:09:44	0:00:00	00:09:48	00:26:03
		_Trans_VQ	Inbound	2023-01-12	3	0	3	0	0	0.0%	00:00:00	00:00:00		00:00:00	00:00:00
		Total			**829**	**596**	**228**	**5**	**8**	**71.9%**	**00:15:44**	**00:11:41**	**0:00:22**	**00:12:08**	**00:52:29**
	Total				**829**	**596**	**228**	**5**	**8**	**71.9%**	**00:15:44**	**00:11:41**	**0:00:22**	**00:12:08**	**00:52:29**
Total					**829**	**596**	**228**	**5**	**8**	**71.9%**	**00:15:44**	**00:11:41**	**0:00:22**	**00:12:08**	**00:52:29**

Statistics Definitions

Statistic Name	Description	Format
Tenant	Defaults to “Environment”	Text
Media Type	Defaults to Voice	Text
Queue	Queue name	Text
Interaction Type	Inbound or Outbound	Text
Day	Date of statistics	yyyy-mm-dd
Adj Entered	Total calls that entered the queue, excluding those that abandoned before two minutes	Count
Accepted Agent	Total calls answered by agents	Count
Adj Abandoned	Total calls that abandoned while waiting in queue, excluding those that abandoned before two minutes	Count
Routed Other	Additional research is being completed at this time to determine the definition	Count
Rejected	Total Calls offered to agents that were not answered	Count

Adj Answer Rate	Total calls offered to the agent that were not answered	Count
ASA	Average speed of answer	hh:mm:ss
Avg. Talk Time	*(Total Talk Time) / (Accepted Agent)*	hh:mm:ss
Avg. Hold Time	*(Total Hold Time) / (Accepted Agent)*	hh:mm:ss
Avg. Handle Time	*(Total Handle Time) / (Accepted Agent)*	hh:mm:ss
Max Accept Time (Fmt)	Maximum amount of time any call waited before being answered by an agent (does not include calls that abandoned)	hh:mm:ss

9.2.5.3 Queue Statistics_Adjusted CB

The Queue Statistics_Adjusted_CB report provides details of the queue statistics specific to Callback. Calls are included on this report after the customer has been called back and connected to an agent.'

This report can be found in Historical Reporting: Shared Reports > Custom > Queue Statistics_Adjusted_CB

Queue Statistics_Adjusted_CB

Tenant	Media Type	Queue	Interaction Type	Day	Adj Entered	Accepted Agent	Adj Abandoned	Routed Other	Rejected	Adj Answer Rate	ASA	Avg. Talk Time	Avg. Hold Time	Avg. Handle Time	Max Accept Time (Fmt)
Environment	Voice	_Esp_VQ_CB_OUT	Outbound	2023-01-12	7	2	5	0	0	28.6%	00:04:05	00:06:07	0:00:00	00:06:18	00:07:01
		_Gen_VQ_CB_OUT	Outbound	2023-01-12	104	103	0	0	1	99.0%	00:00:45	00:15:48	0:01:39	00:17:42	00:02:48

Statistics Definitions

Statistic Name	Description	Format
Tenant	Defaults to “Environment”	Text
Media Type	Defaults to Voice	Text
Queue	Queue name	Text
Interaction Type	Inbound or Outbound	Text
Day	Date of statistics	yyyy-mm-dd
Adj Entered	Total calls that entered the queue	Count
Accepted Agent	Total calls answered by agents	Count
Adj Abandoned	Total calls that abandoned while waiting in queue	Count
Routed Other	Additional research is being completed at this time to determine the definition	Count
Rejected	Total Calls offered to agents that were not answered	Count
Adj Answer Rate	Total calls offered to the agent that were not answered	Count
ASA	Average speed of answer	hh:mm:ss
Avg. Talk Time	(Total Talk Time)/(Accepted Agent)	hh:mm:ss
Avg. Hold Time	(Total Hold Time)/(Accepted Agent)	hh:mm:ss
Avg. Handle	(Total Handle Time)/(Accepted Agent)	hh:mm:ss

Time		
Max Accept Time (Fmt)	Maximum amount of time any call waited before being answered by an agent (does not include calls that abandoned)	hh:mm:ss

11.1 Accessing Genesys Troubleshooting

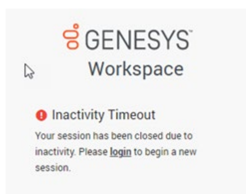
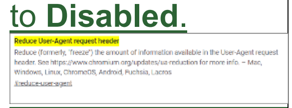
Issue	Description	Resolution
Portal won't load	Genesys portal is not opening through the link on the gateway page~~:~~	• Refresh the Genesys portal page after it fails to open. • Clear browser history. • ~~Click on~~Select this~~-~~ link to go directly to the Genesys Portal page. • Try opening the Genesys Portal Page in a different browser (Chrome, Firefox or Edge). • Save the portal as a favorite ~~on your~~ in the browser.
White Label Error	White Label Error displaying when attempting to access the agent page:	• Clear browser history. • ~~Click on~~Select this link to go directly to the Genesys Portal page. • Open the Genesys Portal Page in a different browser (Chrome, Firefox or Edge). • Save the portal as a favorite ~~on your~~in the browser.
Can't log in, invalid credentials	Agent Desktop log-in:	• All Genesys user IDs are case sensitive. Please ensure ~~you are using~~ use of the correct case. • Be sure to use the correct Tenant: sowi.mgep.info
	Platform Administration:	• All Genesys user IDs are case sensitive. Please ensure ~~you are using~~use of the correct case. • ~~You should have been~~ All users are given a temporary password for Platform Administration when ~~your~~their account was created. If ~~you do not know what this~~the temporary password is~~, contact~~ unknown, the user must submit a ticket to the Wisconsin Help Desk. See Section 11.6 SUBMITTING A GENESYS SUPPORT TICKET.
	Designer log-in:	• All Genesys user IDs are case sensitive. Please ensure ~~you are using~~ use of the correct case.

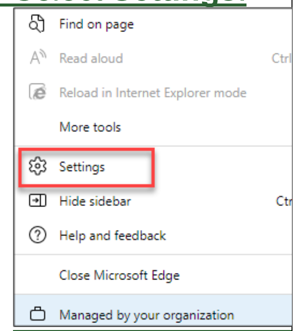
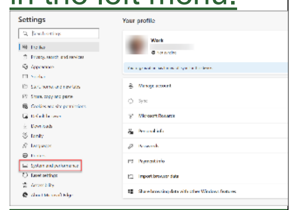
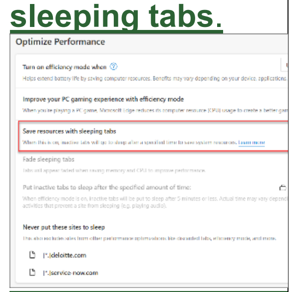
		• Be sure to use the correct Tenant: sowi.mgep.info
	Invalid or forgotten credentials	• See 2.3 FORGOTTEN CREDNTIALS for instructions to recover a WAMS user ID or password.

11.2 Status Troubleshooting

Issue	Description	Resolution
Not receiving calls in "Ready" status	Not receiving calls while in "Ready" state	• ~~Contact your supervisor to ensure you are assigned an appropriate skill~~ • ~~Contact for assistance and clearly state you aren't receiving calls in a "Ready" status.~~Submit a ticket to the Wisconsin Help Desk. See Section 11.6 SUBMITTING A GENESYS SUPPORT TICKET.
Stuck in "Busy" status	Stuck in "Busy" status and not able to change to "Ready"	• ~~Contact for assistance and clearly state you are stuck in a busy status.~~Submit a ticket to the Wisconsin Help Desk. See Section 11.6 SUBMITTING A GENESYS SUPPORT TICKET.
Unexpected Status Changes	Selected Status of "Ready" unexpectedly changes to "Not Ready" (No Reason Code)	Genesys is unable to complete a call to the agent. This may be caused by: • Problems with the agent's phone or phone system. • Routing issues with the long distance carrier between Genesys and the agent. **Troubleshooting:** • Call the agent's phone outside of Genesys to ensure it is operable. • If phone is found to be operable, ~~contact for assistance and clearly state you have had an unexpected status change, what the change is, and that your phone is otherwise operable.~~submit a ticket to the Wisconsin Help Desk. See Section 11.6 SUBMITTING A GENESYS SUPPORT TICKET.
	Selected Status of "Ready" unexpectedly changes to "Not Ready" (No Answer)	Genesys offered a call to the agent and the agent did not answer. This may be caused by:

		• Agent not answering a call that rang to their phone. • Agent's phone did not ring when the call was offered. **Troubleshooting:** • Call the agent's phone outside of Genesys to ensure it is operable. • If phone is found to be operable, ~~contact for assistance and clearly state you have had an unexpected status change, what the change is, and that your phone is otherwise operable.~~submit a ticket to the Wisconsin Help Desk. See 11.6 SUBMITTING A GENESYS SUPPORT TICKET.

	Logged out of Agent Desktop for inactivity. *Show/Hide example image* 	Most times this is due to a setting in Chrome or Edge that puts the tabs to "sleep" if they are idle. **Update Chrome Settings** *Show/Hide Update Chrome Setting Instructions* 1. In the Chrome address bar, type: `chrome://flags/#reduce-user-agent` 2. Update the Reduce User-Agent request header to **Disabled**.  ***Update Edge Settings*** *Show/Hide Update Edge Setting Instructions*

		1. Select the **ellipses** in the top right corner of Edge. 2. Select **Settings**.  3. Select **System and Performance** in the left menu.  4. Under Optimize Performance, turn off **Save resources with sleeping tabs.** 
	Agent is unexpectedly logged off or their status is changed to "Logged Off"	Agent's desktop lost connection to the server. May be caused by network disruption. When the desktop loses connection with the server, it will attempt to reconnect for approximately one minute, after which it will log off and notify the agent that they must log back in.

		Troubleshooting: • Follow your local process for contacting local IT to troubleshoot network connectivitiy.

11.5 Supervisor and Administrator Troubleshooting

Issue	Description	Resolution
Monitor tab in Agent Desktop not visible	Monitor tab is not visible	• ~~Contact~~ Submit a ticket to the Wisconsin Help Desk. See Section 11.6 SUBMITTING A GENESYS SUPPORT TICKET.
	Queues ~~and~~/or staff not displaying under monitor tab	• ~~Contact~~ Submit a ticket to the Wisconsin Help Desk. See Section 11.6 SUBMITTING A GENESYS SUPPORT TICKET.
Accessing Historical Reporting, Real-time Reporting, or ~~platform administration~~ Platform Administration or Designer	Unable to access these ~~application~~applications	• ~~Contact~~ Submit a ticket to the Wisconsin Help Desk. See Section 11.6 SUBMITTING A GENESYS SUPPORT TICKET.
Accessing Interaction Recording	Unable to access Interaction Recording	• Before accessing Interaction Recording ~~you~~the user must ~~reset your~~set up a local password in Platform Administration. See Section 10.1 SETTING A LOCAL PASSWORD • ~~Contact~~ Submit a ticket to the Wisconsin Help Desk. See Section 11.6 SUBMITTING A GENESYS SUPPORT TICKET.

11.6 Submitting a Genesys Support Ticket

After referring to the Troubleshooting sections of this guide and the issue is still not resolved users must submit requests to the State of Wisconsin Helpdesk for additional troubleshooting support. The Genesys Support Team receives and tracks support requests via the Wisconsin Help Desk.

General questions can be sent to: dhsgenesyscloudproject@dhs.wisconsin.gov.

Examples of general questions include:

- How do I open a specific report?
- How do I subscribe to a specific report?

11.6.1 Who Should Submit a Ticket?

Requests for support should come directly from the user after all attempts to troubleshoot have been made by the user, local admins, supervisors, and IT/Telecom personnel.

The following requests should only be received from Genesys Admins or Supervisors:

- User add, edit, or deletes
- Change in hours of operation
- Business event requests (meeting, special, technical, etc.)
- Call flow change requests

11.6.2 Opening a Ticket

Tickets can be opened by using one of the following ticket methods:

- Email helpdesk@wi.gov **(preferred)**
- Phone 608-261-4400 (Madison) | 866-335-2180 (Toll-free)
- State employees may use the Cherwell Portal

To expedite the triage process, it’s strongly recommended to include the following in the subject line and body of the email.

Subject Line

Subject line needs to clearly describe the overall issue and mention Genesys.

Subject Line Do	Subject Line Don't
• “Cannot log into Genesys Agent Desktop” • “Unable to download recordings in Genesys Interaction Recording” • “Genesys new user request” • “Please set the Genesys Technical Business	• “Genesys” • “Problems” • “Genesys Issue” • “Genesys isn’t working”

Event”	• “Trouble with Genesys”

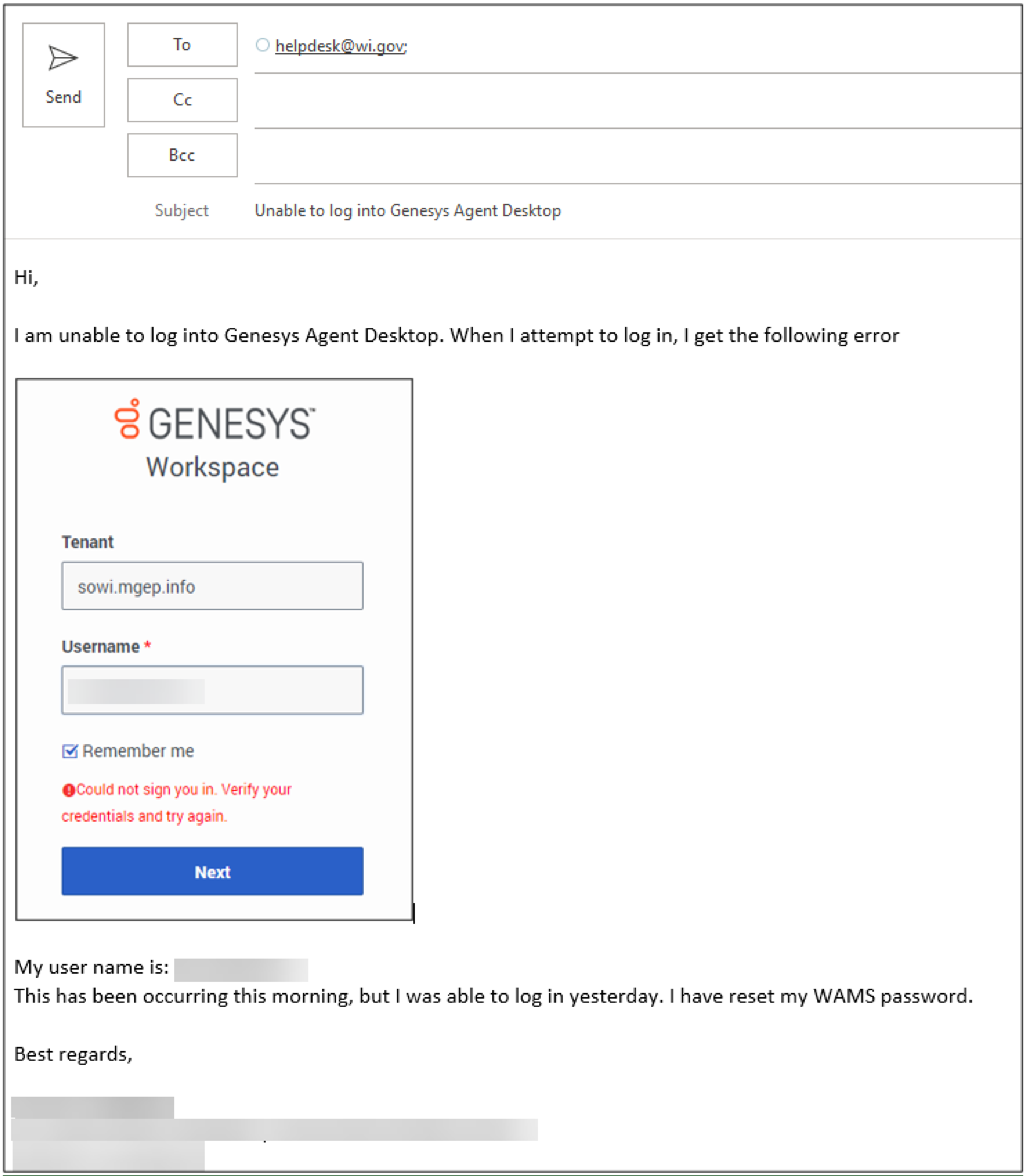
Description

Include “Please assign to DHS Genesys Cloud Support Team” in the beginning of the email or description (not in the subject line).

Include a description with any details relevant to the issue(s), including:

- Name and Username
- Genesys Place the agent is logged into
- Connection ID (for calls)
- Screen Shots
- Thorough description of what the user is experiencing
- Time/date of the incident
- Any error messages
- Any steps that could be used to reproduce the problem
- Any troubleshooting steps completed before opening the ticket

Show/Hide Example email ticket



Note:	Tickets missing the above information may be routed incorrectly or take longer to gather information necessary to resolve.

11.6.3 Escalation Process

Single user issues are not critical or high priority. Do not escalate these issues.

For “Critical” or “High” priority issues, cc dhsgenesyscloudproject@wisconsin.gov when using email to submit a ticket to the Wisconsin Help Desk. If the ticket is called in or opened through the portal send the ticket number to dhsgenesyscloudproject@wisconsin.gov.

Critical or high priority issues are defined as:

- System unusable for all users with no workaround.
- Issues that have significant repercussions for all users but do not render the whole system unusable.
- Multiple users or multiple locations unable to receive or make calls, having a significant effect on a call center’s ability to operate.