WISCONSIN DEPARTMENT OF HEALTH SERVICES
Division of Medicaid Services
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To:	Genesys User Guide Users
From:	Autumn Arnold, Bureau Director Bureau of Eligibility and Enrollment Policy
Re:	**Genesys User Guide Release 24-01**
Release Date:	12/18/2024
Effective Date:	12/18/2024

EFFECTIVE DATE		The following policy additions or changes are **effective 12/18/2024** unless otherwise noted. **Underlined text denotes new text. Text with a strike through it denotes deleted text.**
POLICY UPDATES		
2	**Accessing Genesys**	Updated table of contents.
2.1	**Logging Into Genesys**	Updated table of contents.
2.1.1	**Account Activation**	New section
2.1.2	**Logging In to Genesys after Account Activation**	New subsection, updated image.
2.1.3	**After Your First Time Logging In to Genesys**	Section removed.
2.4	**Change Password**	New section
2.5	**Edit Your Profile**	New section
3	**Agent Desktop**	Updated table of contents.
3.2	**Performance**	Updated table of contents.
3.2.1	**My Performance**	New section
3.2.2	**My Status**	New section
3.2.3	**My Interactions**	New section
3.2.4	**My Queues Activity**	New section
4	**Call Handling**	Updated table of contents.
4.1	**Receiving a Call From a Queue**	Updated table of contents.

4.1.1	**Go On Queue**	New subsection with existing content from 4.1.
4.1.1.1	**Notification of Call**	New subsection with existing content from 4.1.
4.1.1.2	**Ending a Call**	New subsection with existing content from 4.1.
4.1.2	**Agent Training Call Flow**	New section.
4.1.2.1	**Receiving a Practice Call From the Queue**	New section.
4.3	**Making an External Call**	New section with existing content from 4.3.
4.3.1	**Ending a Call**	New section with existing content from 4.3.
4.5	**Transferring a Call**	Updated table of contents.
4.5.1	**Transferring a Call to an XFERS Genesys Queue**	New section.
4.5.2	**Transferring a Call to a Genesys Agent**	New section.
4.6	**Conference**	Renumbered section.
4.6.1	**Start a Conference**	New section with existing content from 4.5.2.
4.6.2	**Place a Conferenced Party On Hold or Remove Them From the Call**	New section with existing content from 4.5.2.
4.7	**Consult**	Updated table of contents.
4.7.1	**Place a Party On Hold or Remove Them From the Call**	New section with existing content from 4.5.3.
4.7.2	**Transfer the Second Party to the Third Party**	Updated tile, moved content from 4.5.3.
4.7.3	**Bring All Parties Together in a Conference Call**	Updated tile, moved content from 4.5.3.
4.8	**Expanding the Interactions Pane**	New section.
4.9	**Automated Telephonic Signature (ATS)**	New section.
6	**Supervisors**	Updated table of contents.
6.1	**Introduction to Performance**	Updated table of contents.
6.1.2	**Viewing Agent Status**	Updated table of contents.
6.1.2.1	**Agent Status View**	New section with existing content from 6.1.2.
6.1.2.2	**Status, Secondary Status and Routing Status**	New section with existing content from 6.1.2.
6.1.2.3	**Add Secondary and Routing Status to the Agent Status View**	New section with existing content from 6.1.2.
6.1.7	**Exporting or Scheduling a Report**	Updated table of contents.

6.1.7.1	**Export a Report**	New section with existing content from 6.1.7
6.1.7.2	**Schedule a Report**	New section with existing content from 6.1.7
6.1.8	**Expiring Reports**	New section.
6.1.8.1	**Renewing Reports**	New section.
7	**Local Administrator**	Updated table of contents.
7.2	**Setting Business Events Meetings**	Added table of contents.
7.2.1	**Scheduling a Meeting Business Event**	New section with existing content from 7.2.
7.2.2	**Creating Multiple Meeting Business Event Schedules**	New section with existing content from 7.2.
7.2.3	**Cancelling a Business Event Schedule**	New section.
7.5	**Agent Accounts**	New section.
7.5.1	**Requesting Access for a New Agent**	New section.
7.6	**Assigning Queues**	Updated section number and added table of contents.
7.6.1	**Assign or Unassign a User from a Queue.**	New section with existing content from 7.5.
7.7	**Assigning Languages**	Updated section number and added table of contents.
7.7.1	**Assign Agent Skills-English**	New section with existing content from 7.6.
7.7.2	**Assign Agent Skills – Spanish**	New section with existing content from 7.6.
7.7.3	**Assign Agent Skills - Hmong**	New section with existing content from 7.5.
11	**Troubleshooting**	New section.
11.1	**Submitting a Genesys Support Ticket**	New section with existing content from 11.
11.1.1	**Who Should Submit a Ticket?**	New section with existing content from 11.
11.1.2	**Opening a Ticket**	New section with existing content from 11.
11.1.3	**Escalation Process**	New section with existing content from 11.
11.1.4	**Prioritization**	New section with existing content from 11.
Genesys handbook has been restructured for the Genesys CX Cloud platform update. Legacy Genesys (MGEP) has been removed.		

Table of Contents

2 Accessing Genesys

This section explains how to log in and out of the Agent Desktop and how to recover lost credentials.

2.1 Logging In to Genesys

2.1.1 Account Activation (Video instructions available: Account Activation)
2.1.2 First Time Logging In to Genesys After Account Activation
~~2.1.3 After Your First Time Logging In to Genesys~~

(Video instructions available: Logging In to Genesys)

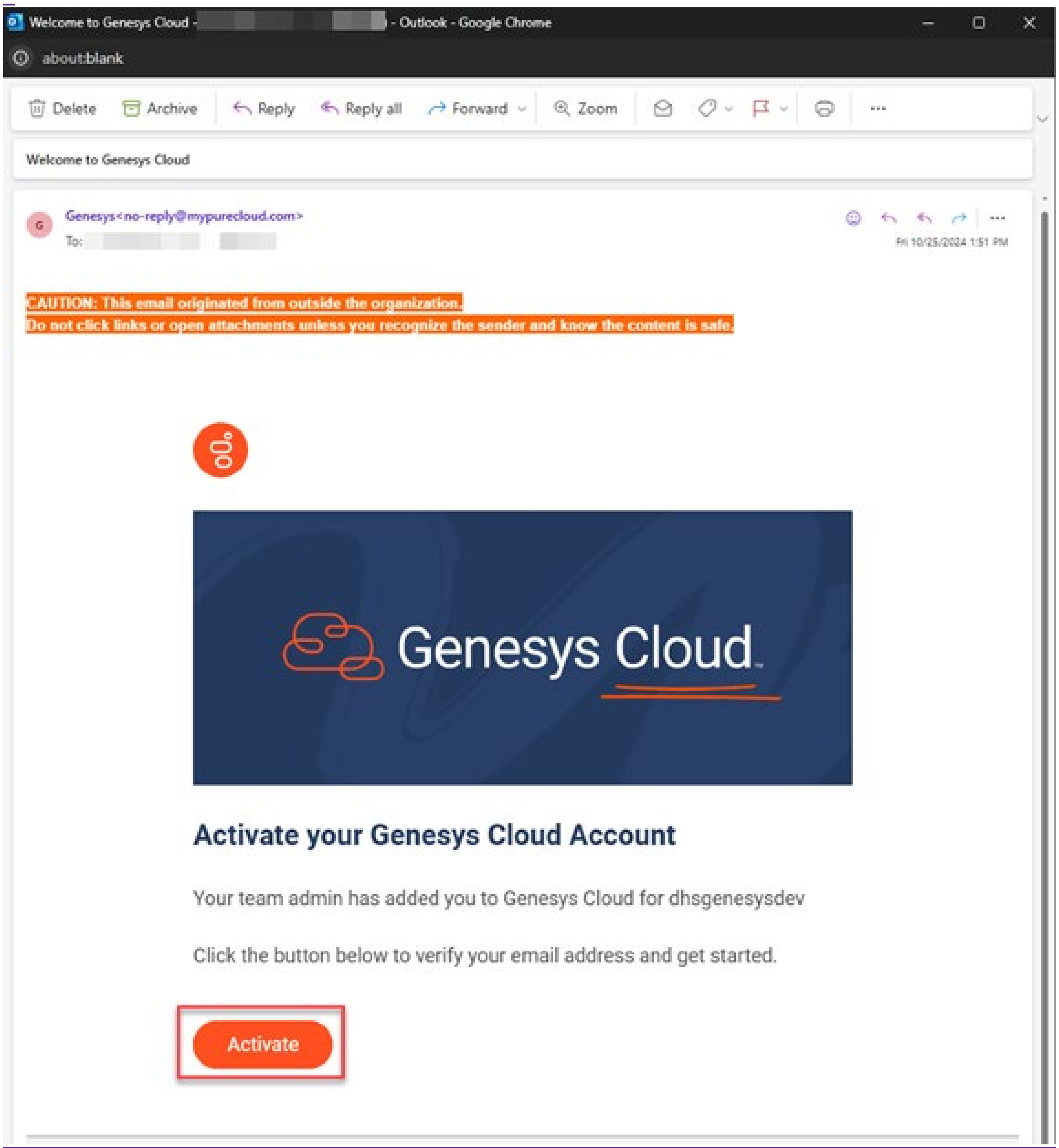
These instructions can be used by agents, supervisors, and local administrators.

2.1.1 Account Activation

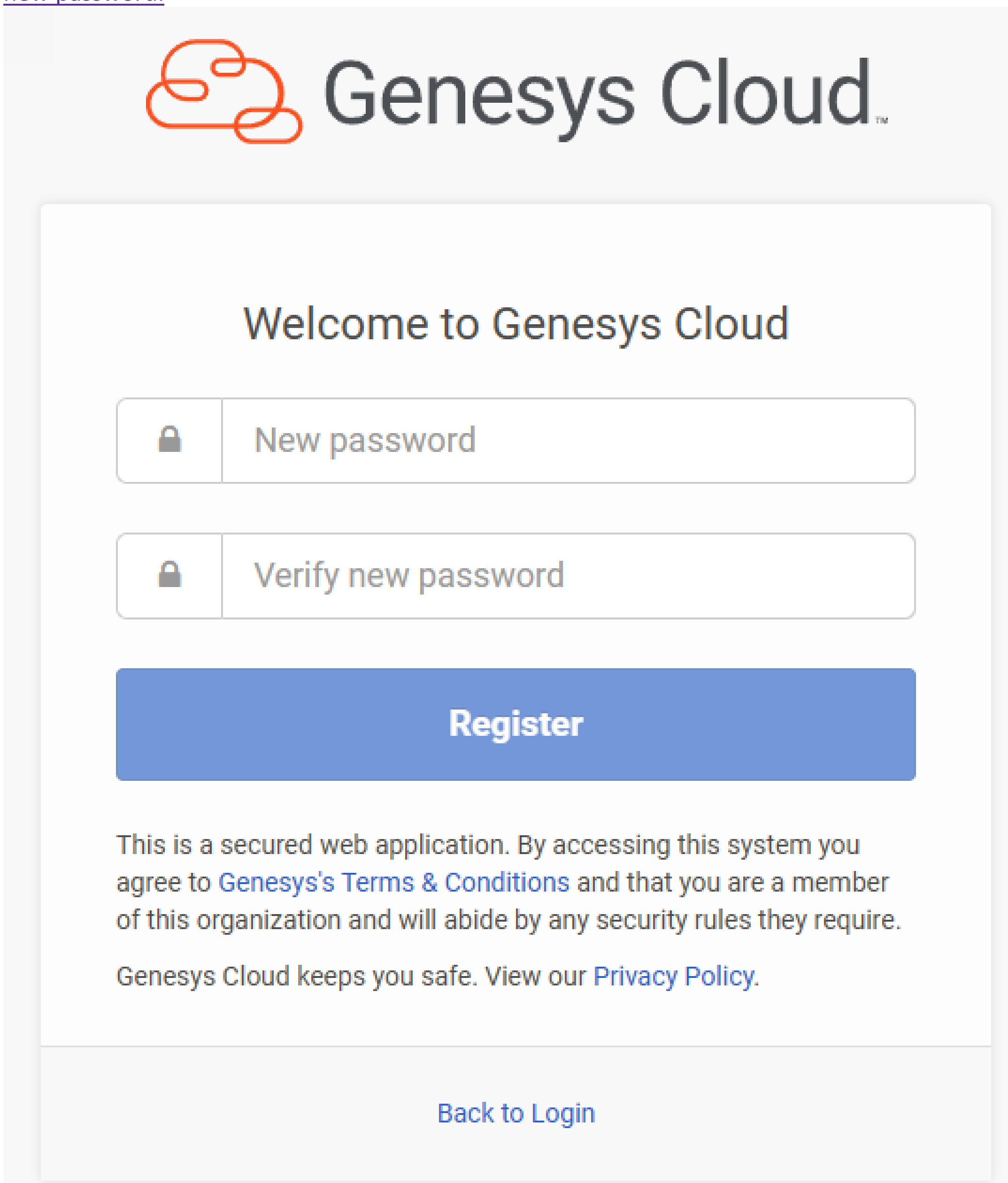
(Video instructions available: Account Activation)

Once access to Genesys Cloud has been granted the agent receives an email.

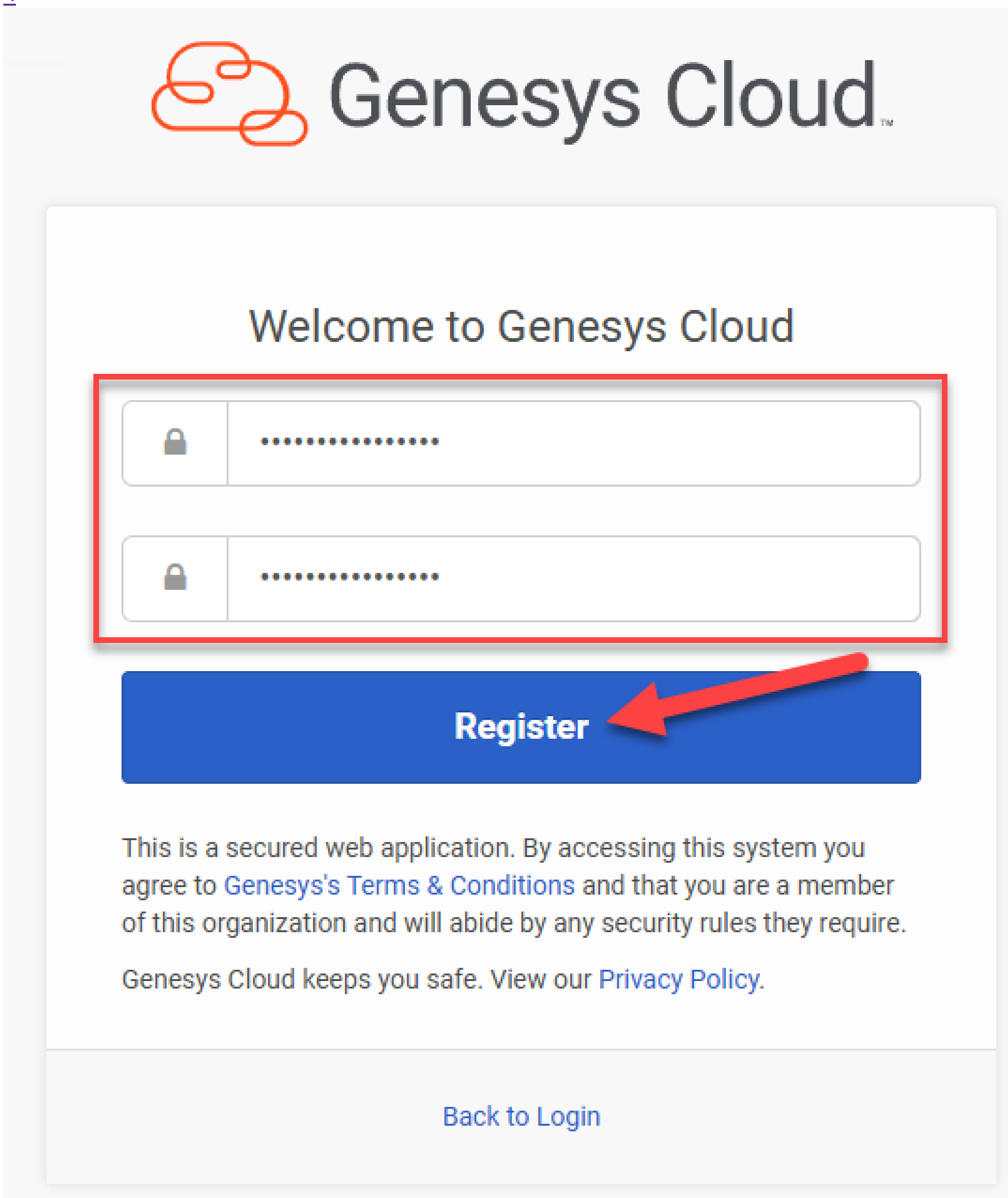
1. Click Activate from the email. Be sure Firefox, Edge, or Chrome browser loads.



2. After clicking Activate the agent is brought to the Welcome to Genesys Cloud page to enter their new password.



3. After entering New password and Verify new password fields, click Register.
   - Password requirements are as follows:
     - The minimum length is eight characters.
     - The maximum length for a password is 400 characters.
     - Passwords must have at least one number, one special character, one uppercase letter, and one lowercase letter.
     - You cannot reuse any of your previous 10 passwords.
     - Do not copy and paste a password to set it.
     - The length of time before a password expires is set up by your administrator.
   - If the password does not meet the requirements, Genesys Cloud sends a message with the suggested change to help meet the requirements.



4. If you are prompted to enter an organization name, use: dhsgenesysprod
5. After successfully activating your account the following message displays, "You have successfully activated your account!"
6. Select Collaborate/Communicate to begin using Genesys Cloud.

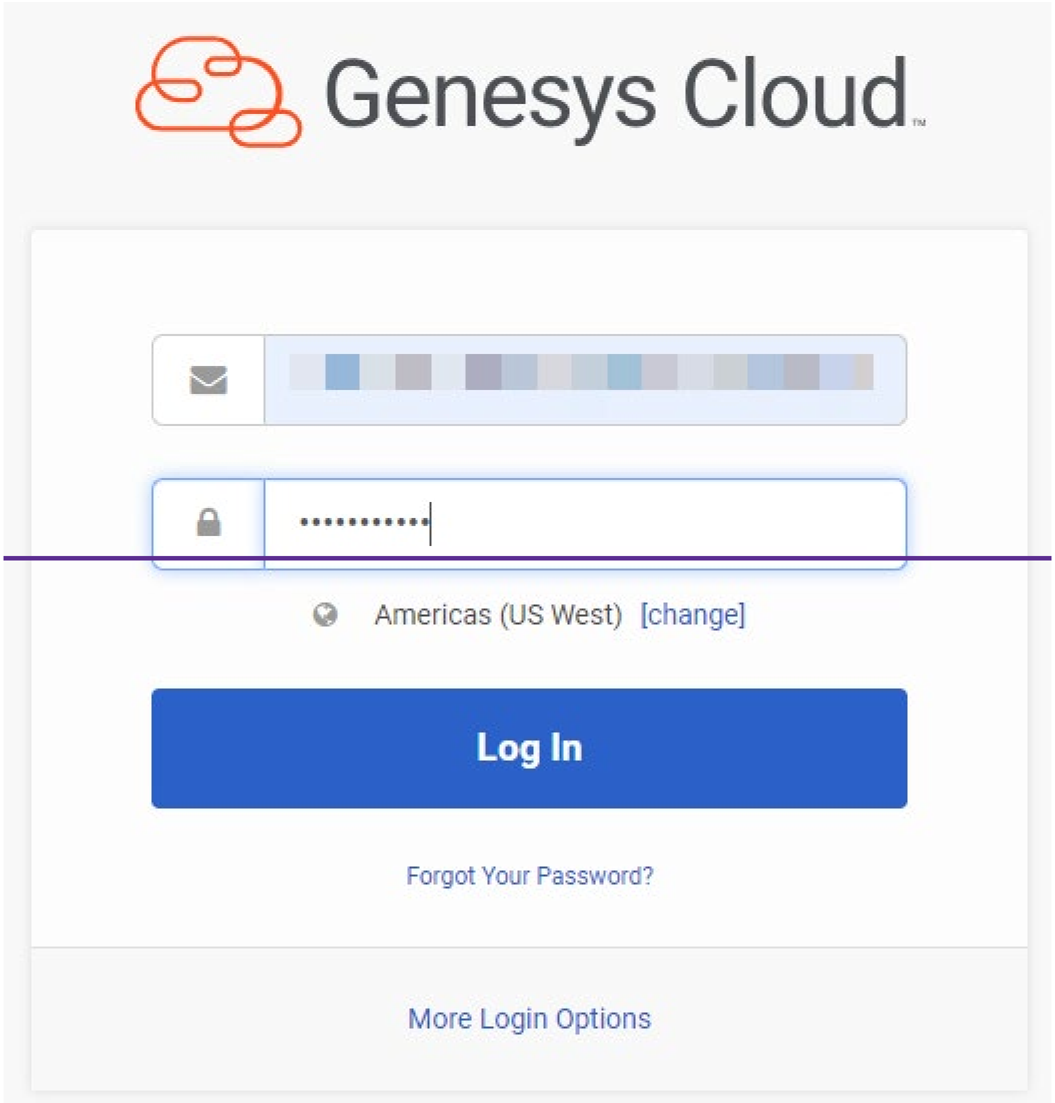
Note	My Account and Architect are not used.

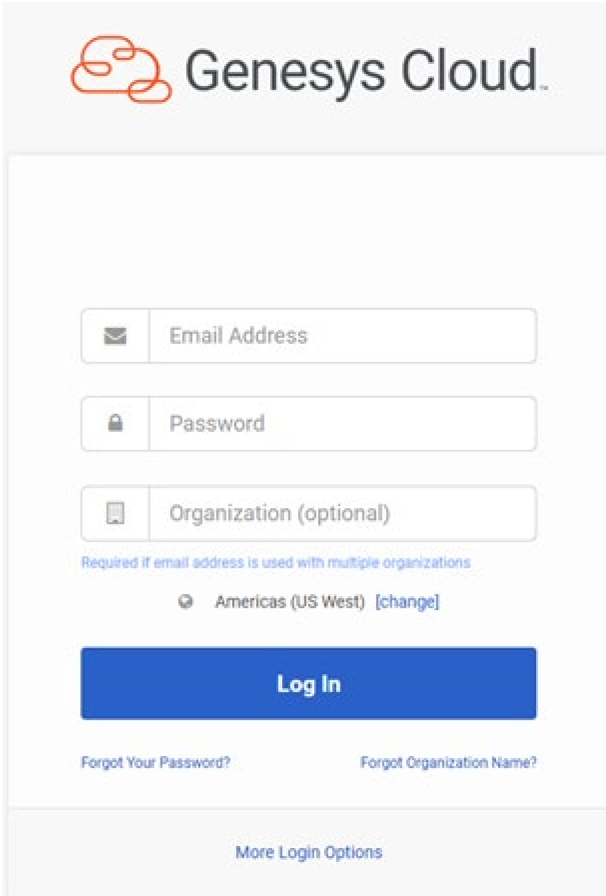

Genesys Cloud
You have successfully activated your account!
My Account
Access and Administer your Genesys Cloud Account settings such as MFA
Collaborate/ Communicate
Real-time tools like group chat, video conference, desktop and file sharing, and unified communications
Architect
Configure Genesys Cloud call flows, set user & system prompts, and more
Logout

2.1.2 ~~First Time~~ Logging In to Genesys After Account Activation

1. Navigate to the Genesys Login Page using Firefox, Edge, or Chrome.
2. Enter the email address and password associated with your Genesys account.
3. If you are prompted to enter an organization name, use:~~-~~ dhsgenesysprod

4. Click Log In.





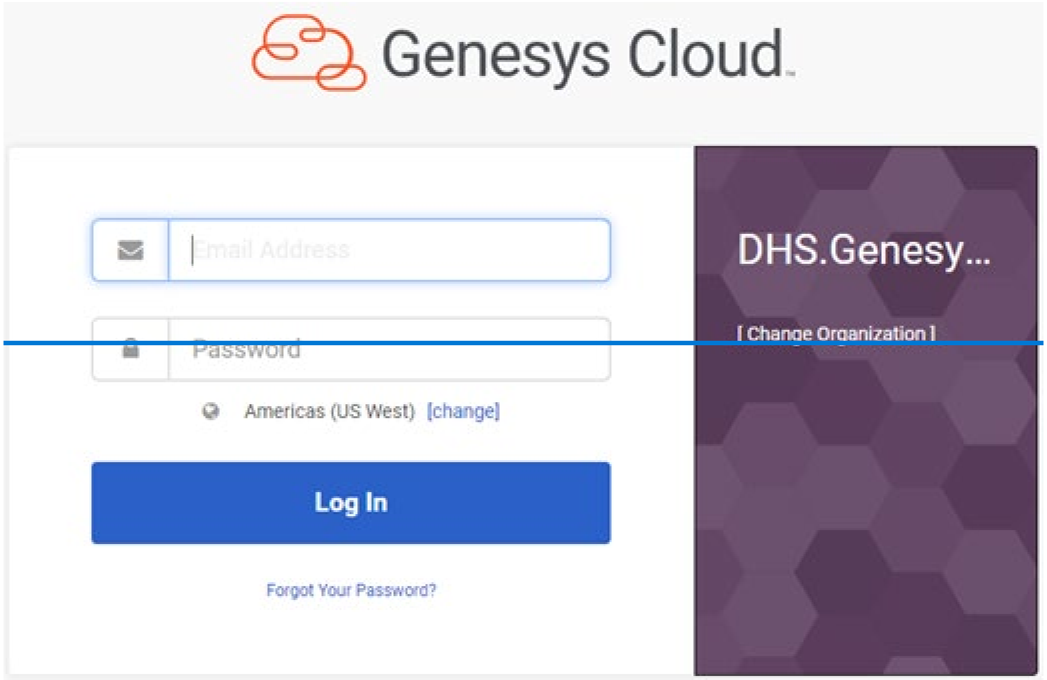
5. If this screen appears, select Collaborate/Communication to begin using Genesys Cloud.

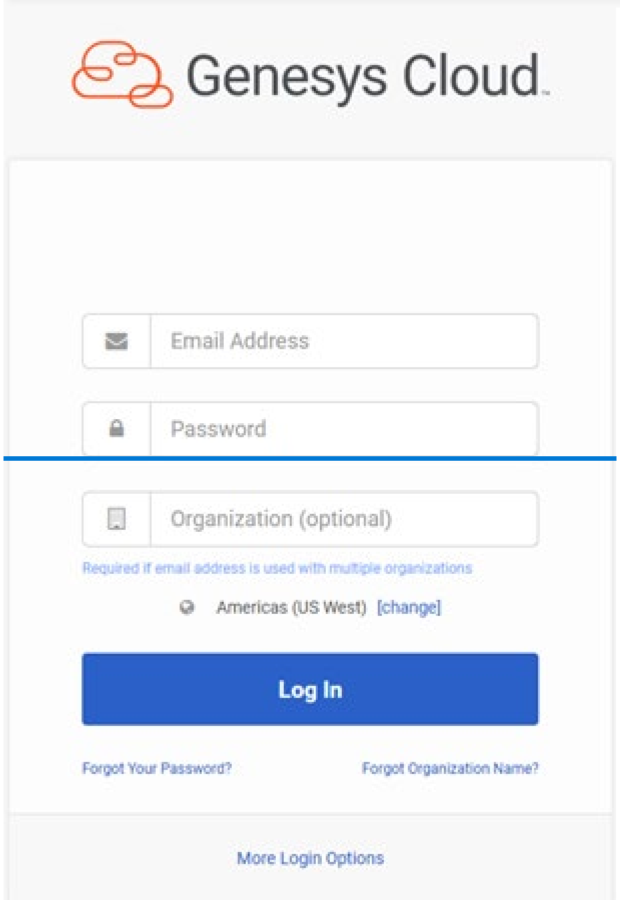
~~2.1.3 After Your First Time Logging In to Genesys:~~

1. ~~Navigate to Genesys Login Page using Firefox, Edge, or Chrome.~~
2. ~~Enter the email address and password associated with your Genesys account.~~

   ~~If you are prompted to enter an organization name, use: dhsgenesysprod~~

~~3.~~1. ~~Click Log In.~~



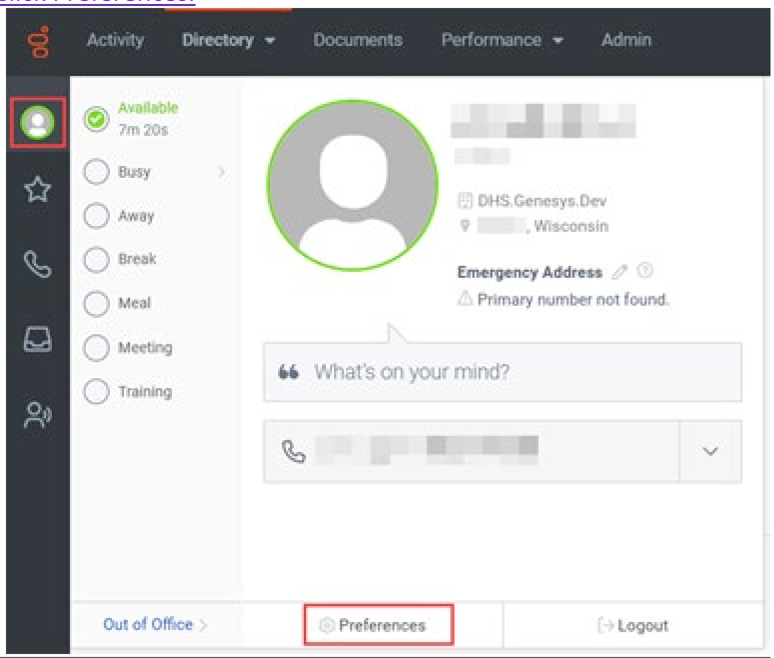


2. ~~If this screen appears, select Collaborate/Communication to begin using Genesys Cloud.~~

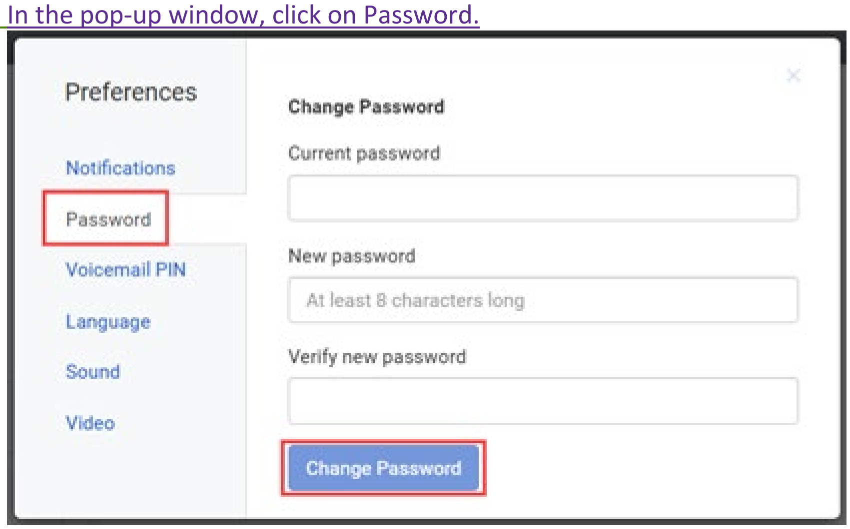
2.5 Change Password

Use these instructions to change your Genesys Cloud password.

1. Click the profile button.
2. Click Preferences.



~~1.~~3. In the pop-up window, click on Password.



4. Enter your Current password, New password, and Verify new password, in the blank fields. Password requirements are as follows:
   - The minimum length is eight characters.
   - The maximum length for a password is 400 characters.
   - Passwords must have at least one number, one special character, one uppercase letter, and one lowercase letter.
   - You cannot reuse any of your previous 10 passwords.
   - Do not copy and paste a password to set it.

- The length of time before a password expires is set up by your administrator.

If the password does not meet the requirements, Genesys Cloud sends a message with the suggested change to help meet the requirements.

5. Click Change Password.

2.6 Edit Your Profile

Consult with your supervisor before making any edits to your profile.

Note	Never add or edit phone numbers. If the phone number associated with the agent's Genesys account is added to their profile, the system can't call the agent, and the agent is not able to receive calls from the system.

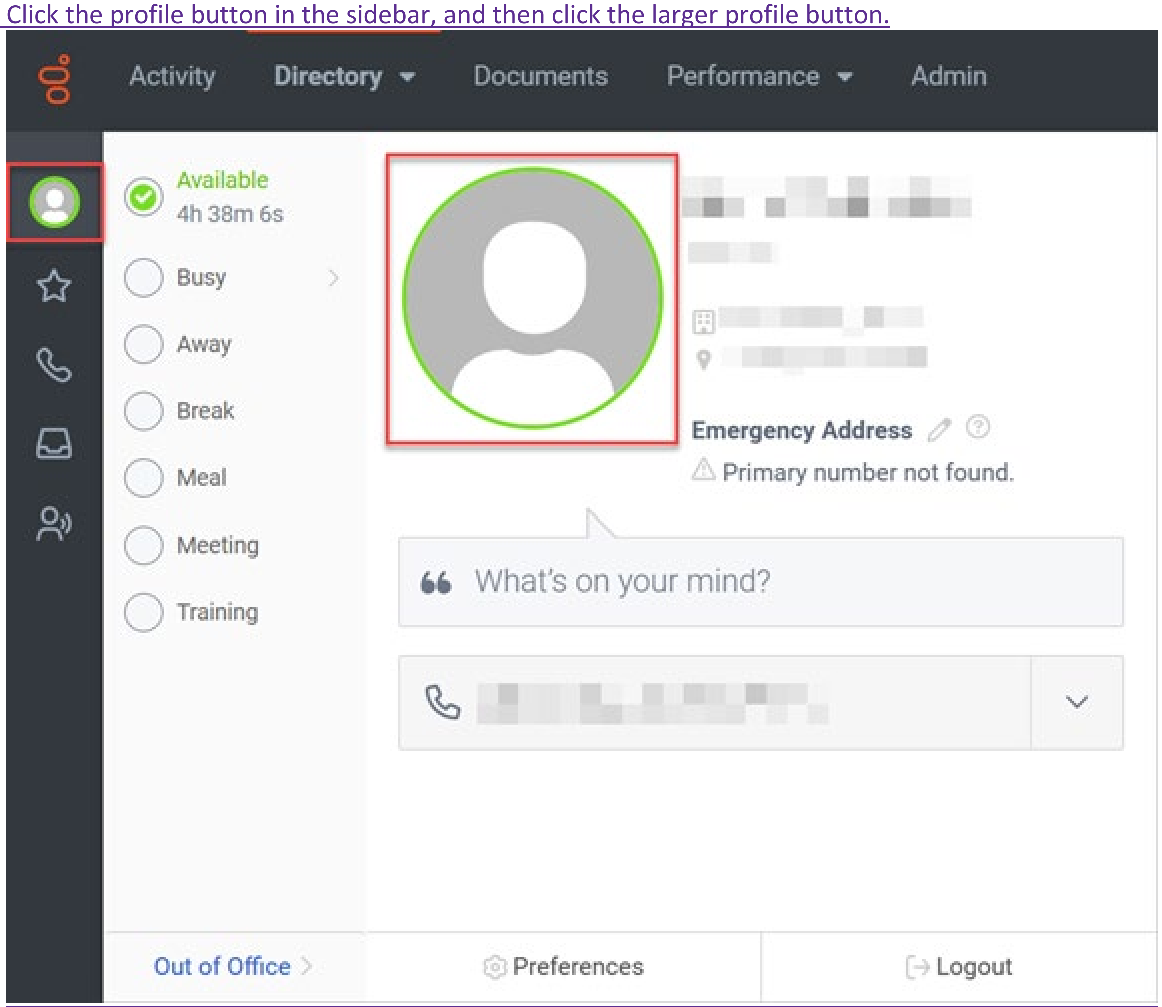
Profiles show users' contact information, status, location, and more. The following information can be updated:

- Profile Picture
- Name
- Title
- Department
- What's on your mind?
- Email

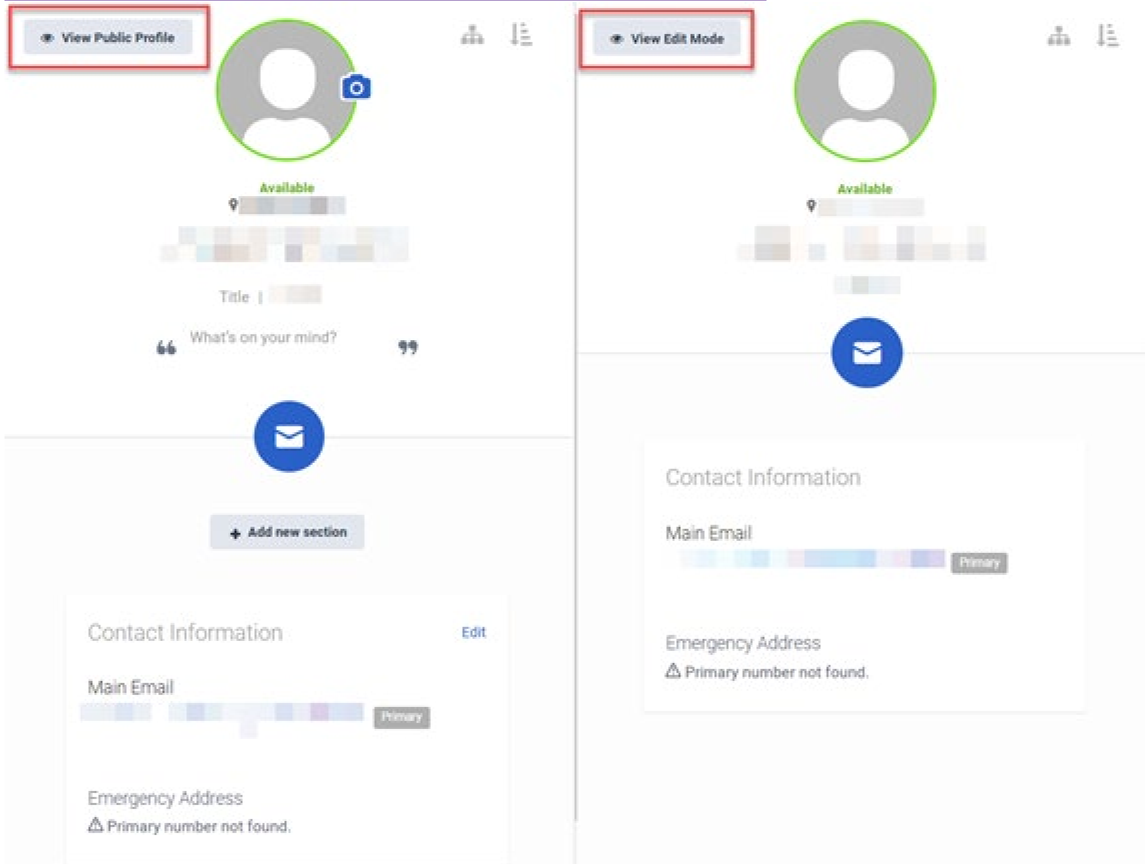
Note	When an email is updated, this changes the email used to login and to receive reports.

To access and make edits to your profile:

1. Click the profile button in the sidebar, and then click the larger profile button.



2. Switch between public and edit views of your profile. To see how your profile looks to other users, click View Public Profile. To edit your profile, click View Edit Mode.



3. To change the information in a section, in edit mode, in the section you want to change, click Edit.

3 Agent Desktop

3.1 Agent Desktop Content Viewer (Video instructions available: Agent Desktop)

This section describes the different tabs displayed on the Genesys user's content viewer. Supervisors and administrators have access to additional information.

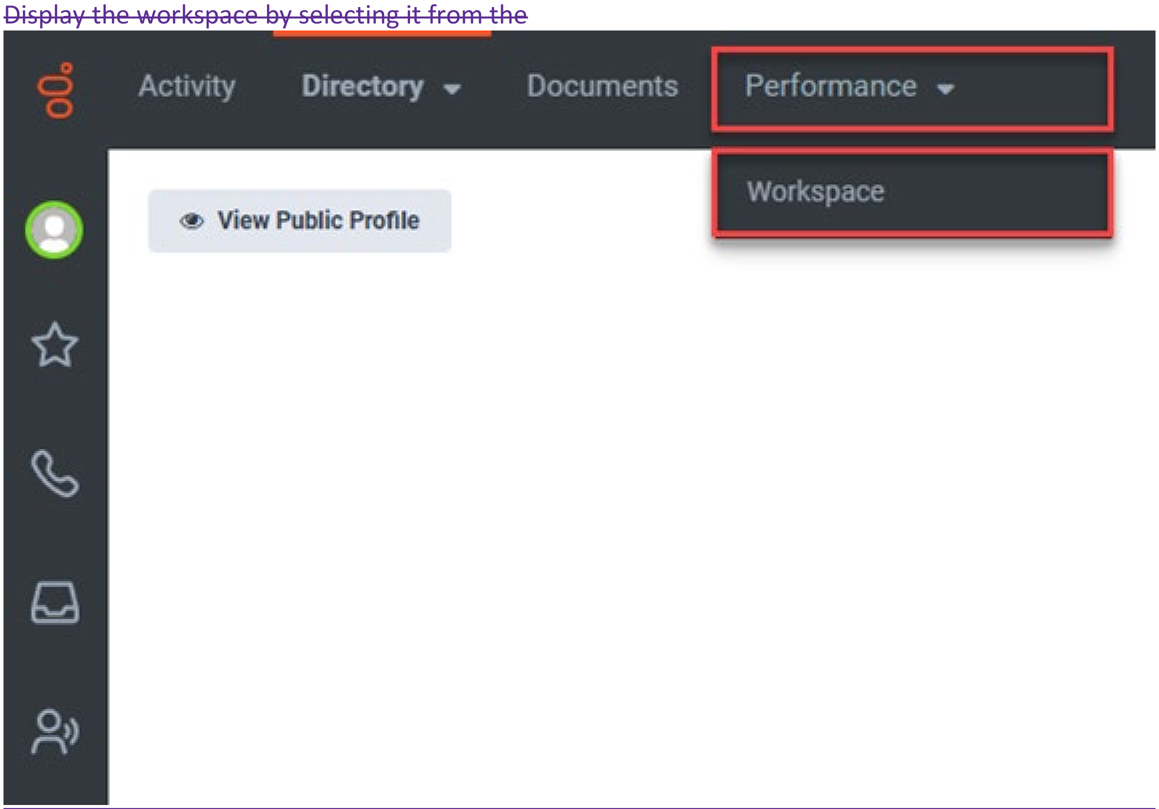
3.2 Performance

(Video instructions available: Performance)

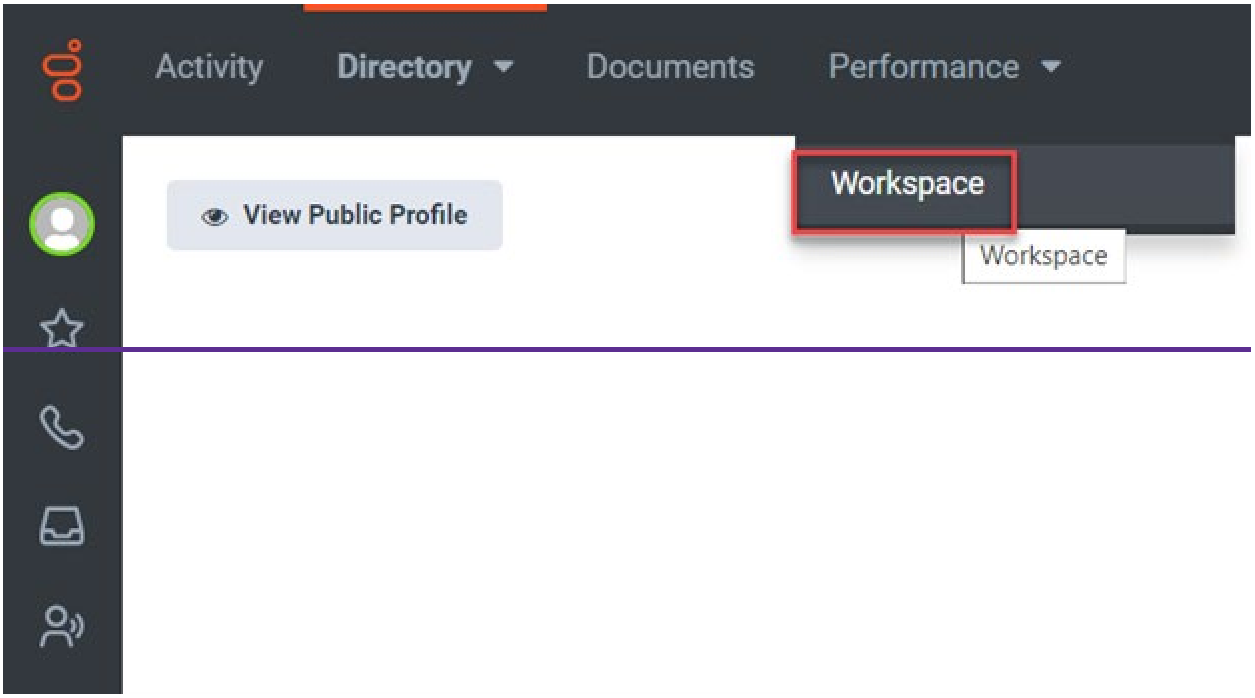
Use the Performance Workspace to view personal statistics, statistics of assigned queues, and interactions. Select the help button in the bottom left corner of the window for help text specific to this view.

Click Performance, and then click Workspace**.**

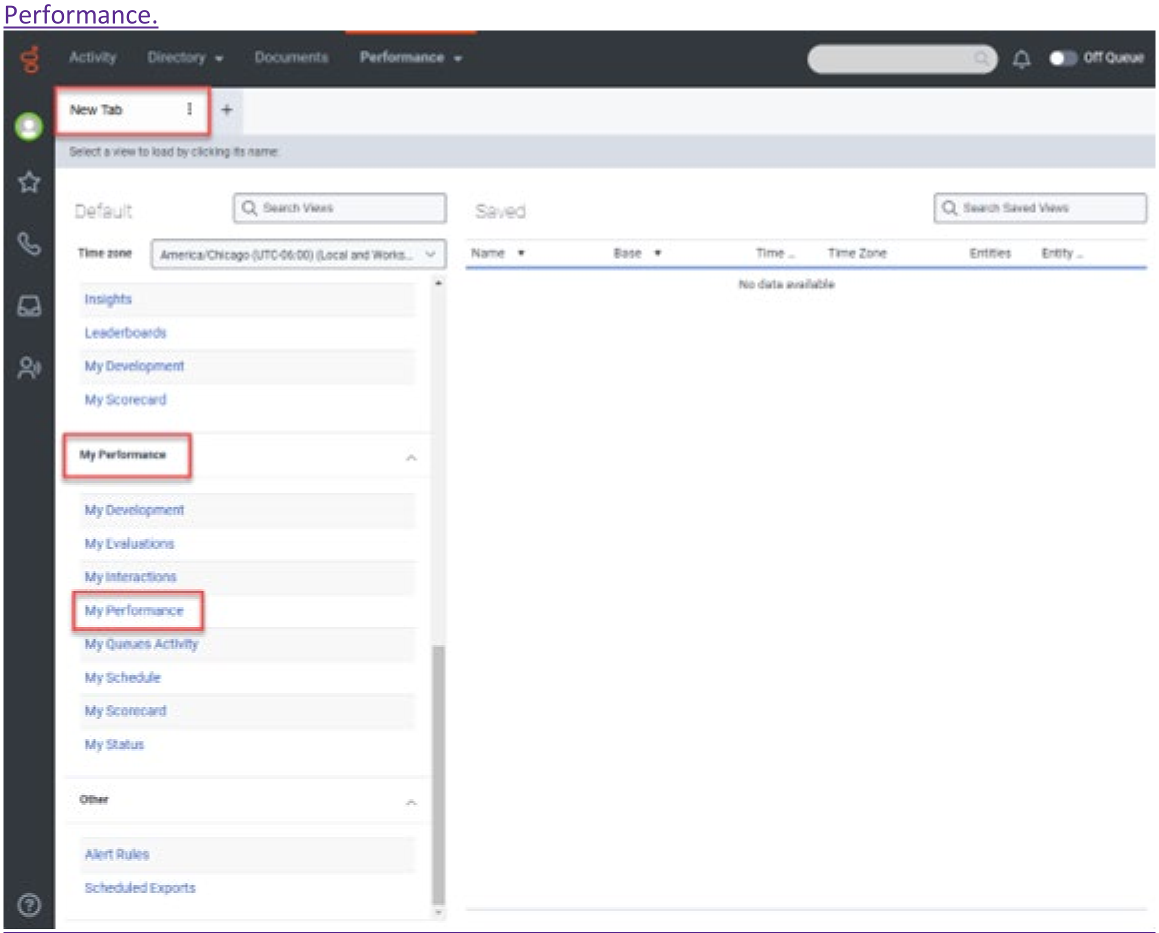
~~Display the workspace by selecting it from the~~



From the Performance ~~drop-down menu.~~

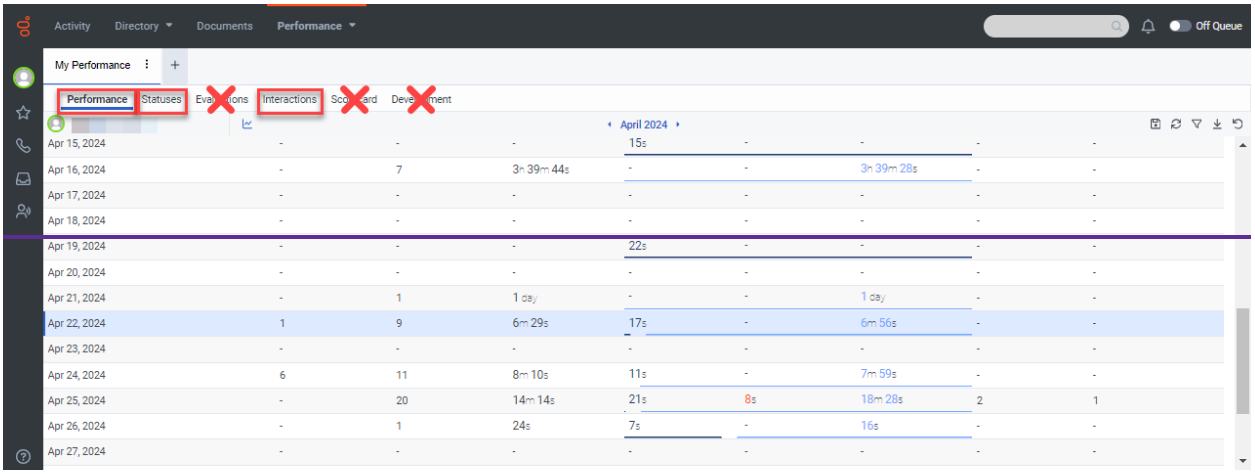


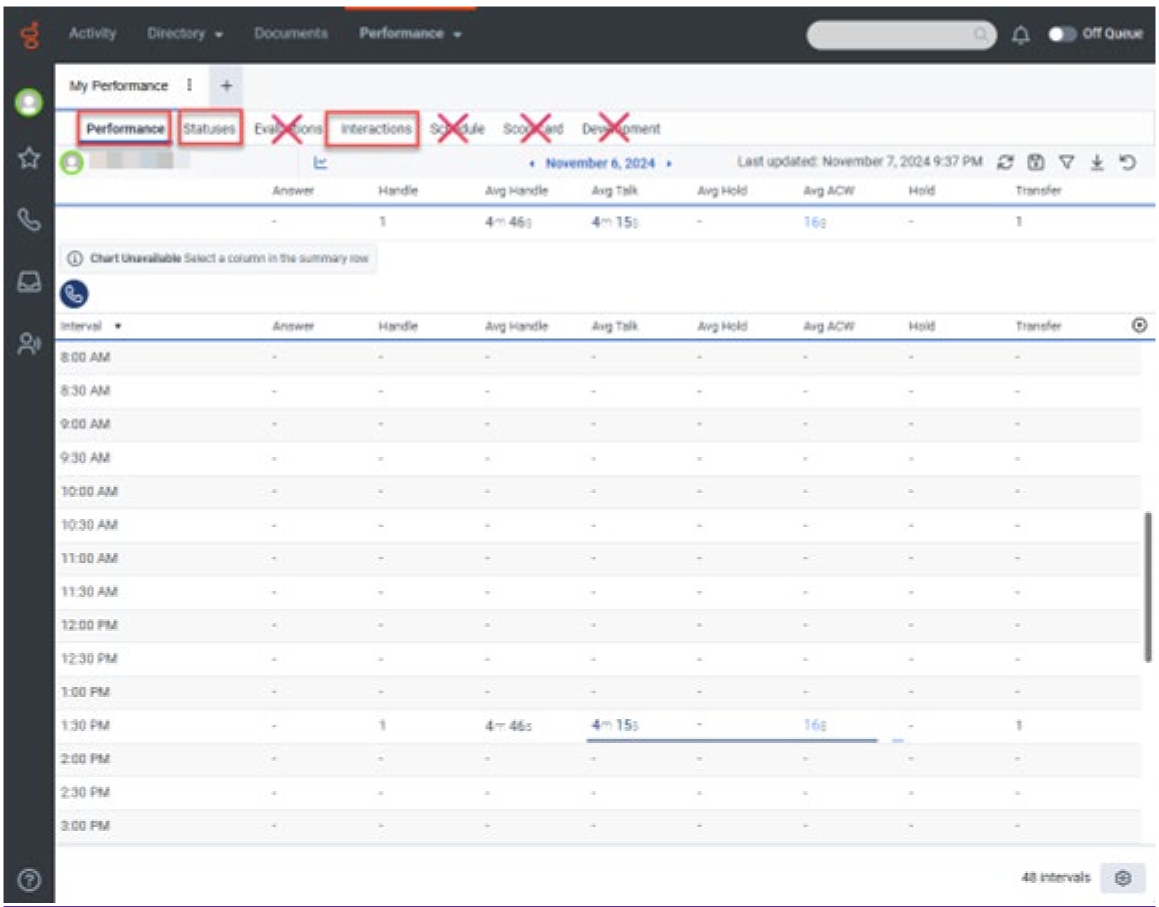
~~From the~~ >Workspace~~,~~ >New Tab screen, scroll down to the section titled My Performance and select My Performance.



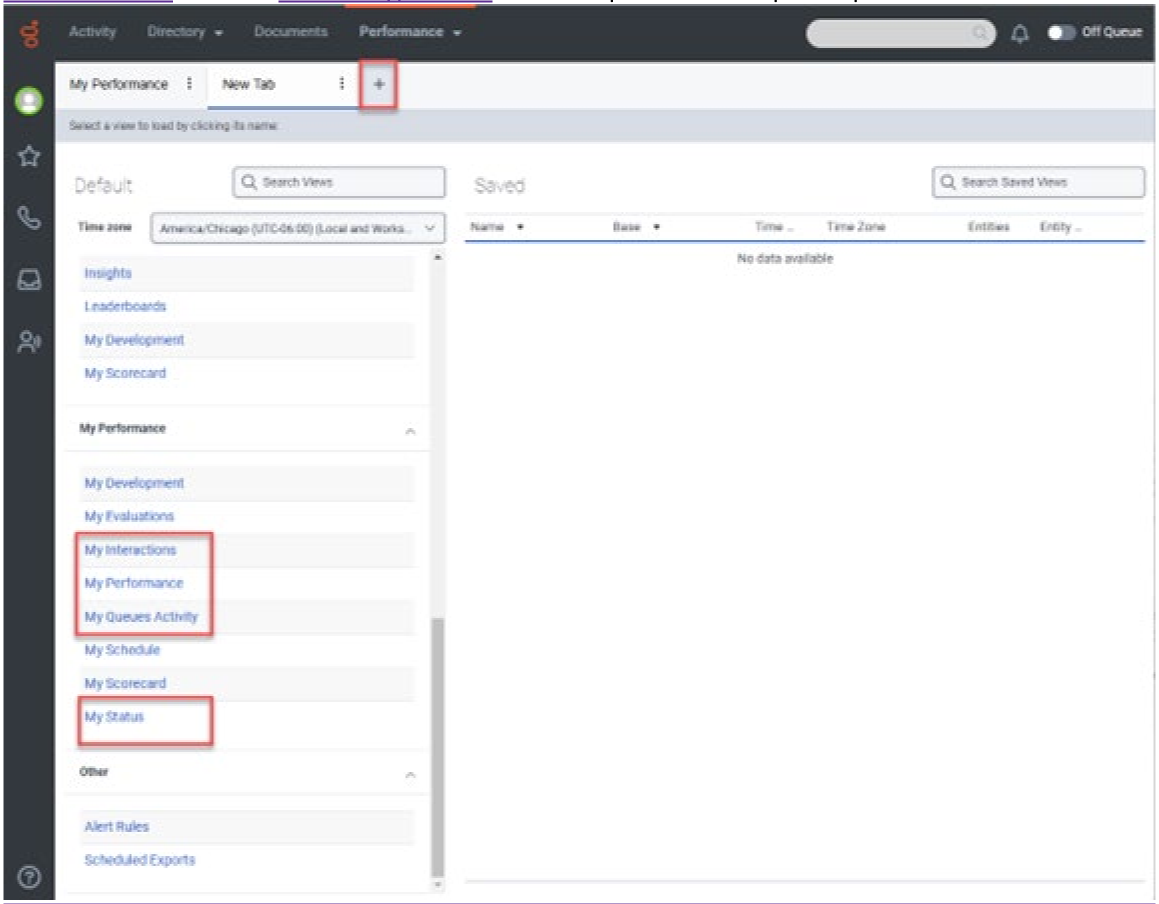
From the My Performance tab you can toggle between Performance, Statuses, ~~or~~ and Interactions ~~to display details for each tab~~.

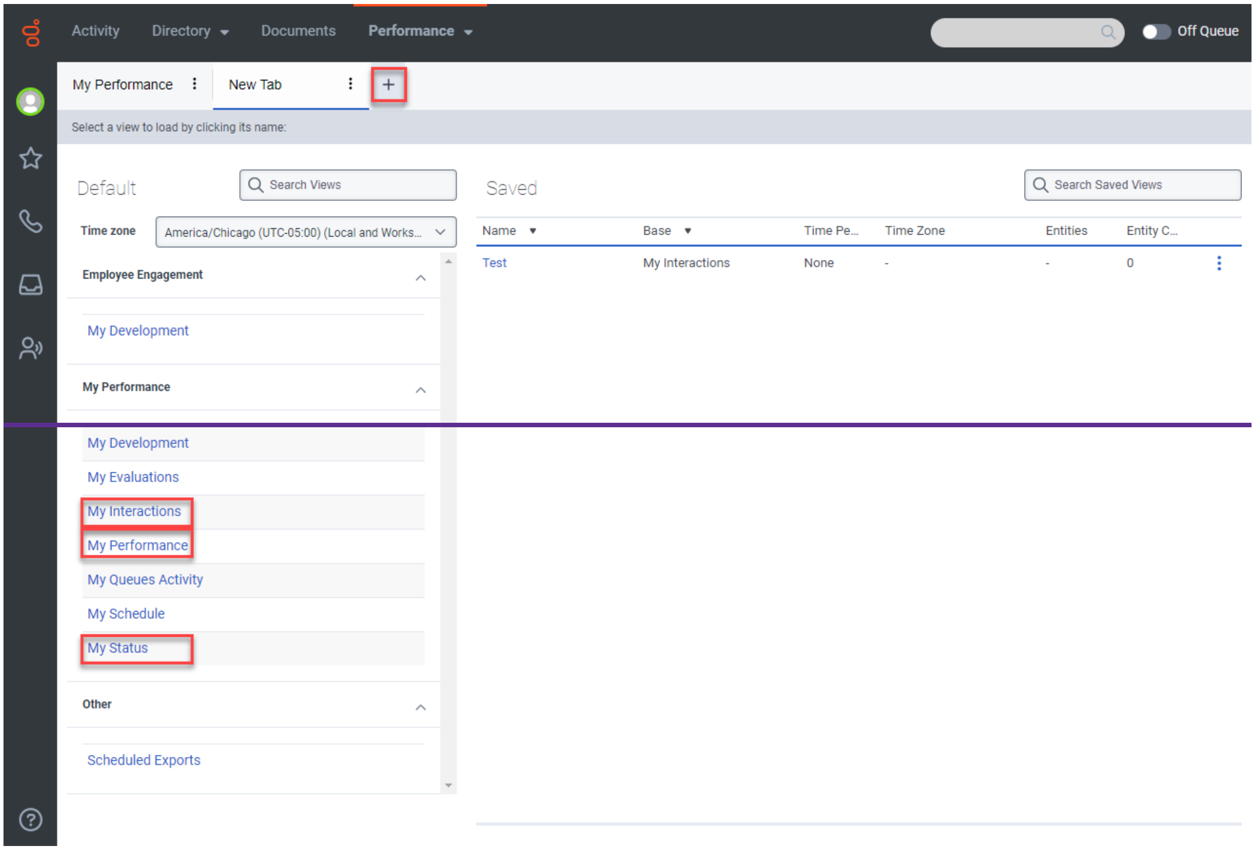
Note The Evaluations, Schedule, Scorecard, and Development tabs are not used.



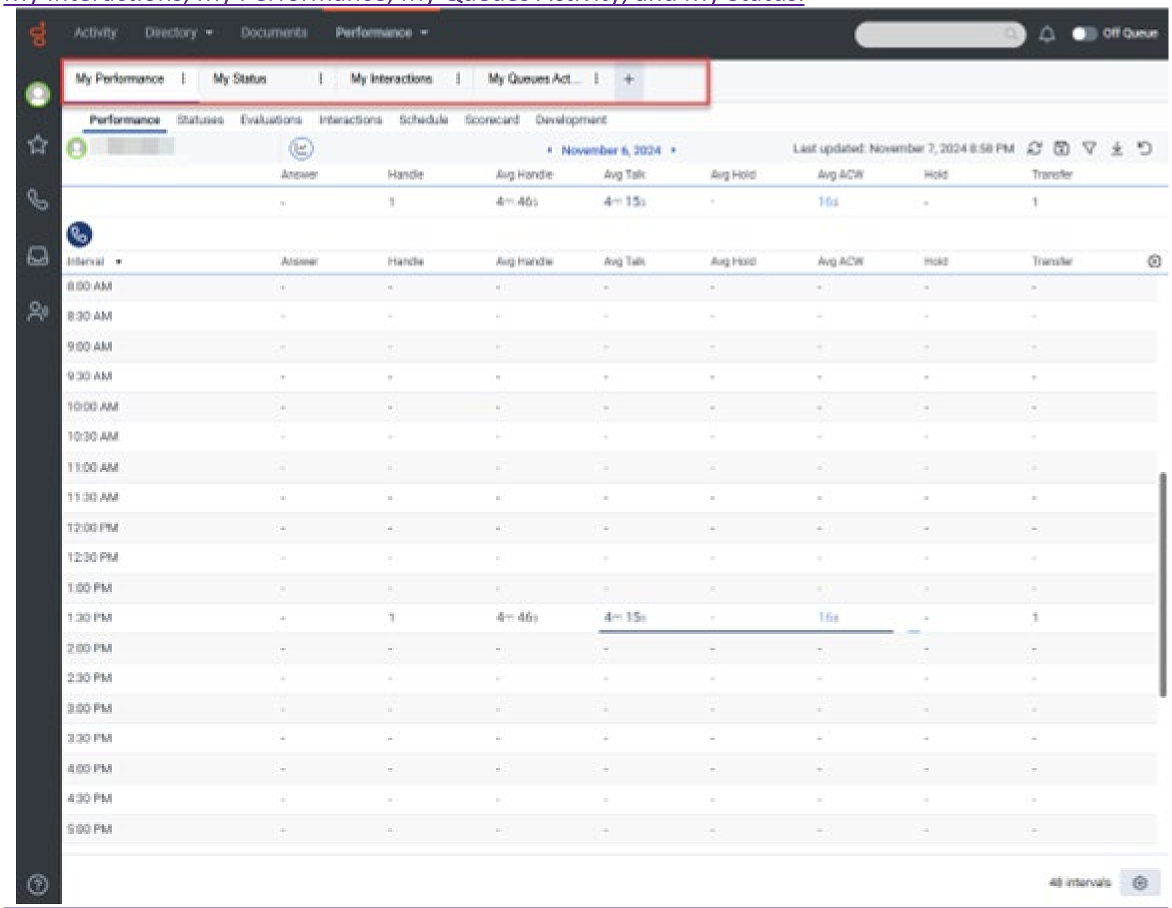


Click the plus button to the right of the My Performance tab to open a new tab~~. Click~~ or multiple tabs. Scroll down and click the ~~tabs~~ desired hyperlinks in the left pane to view specific performance information.

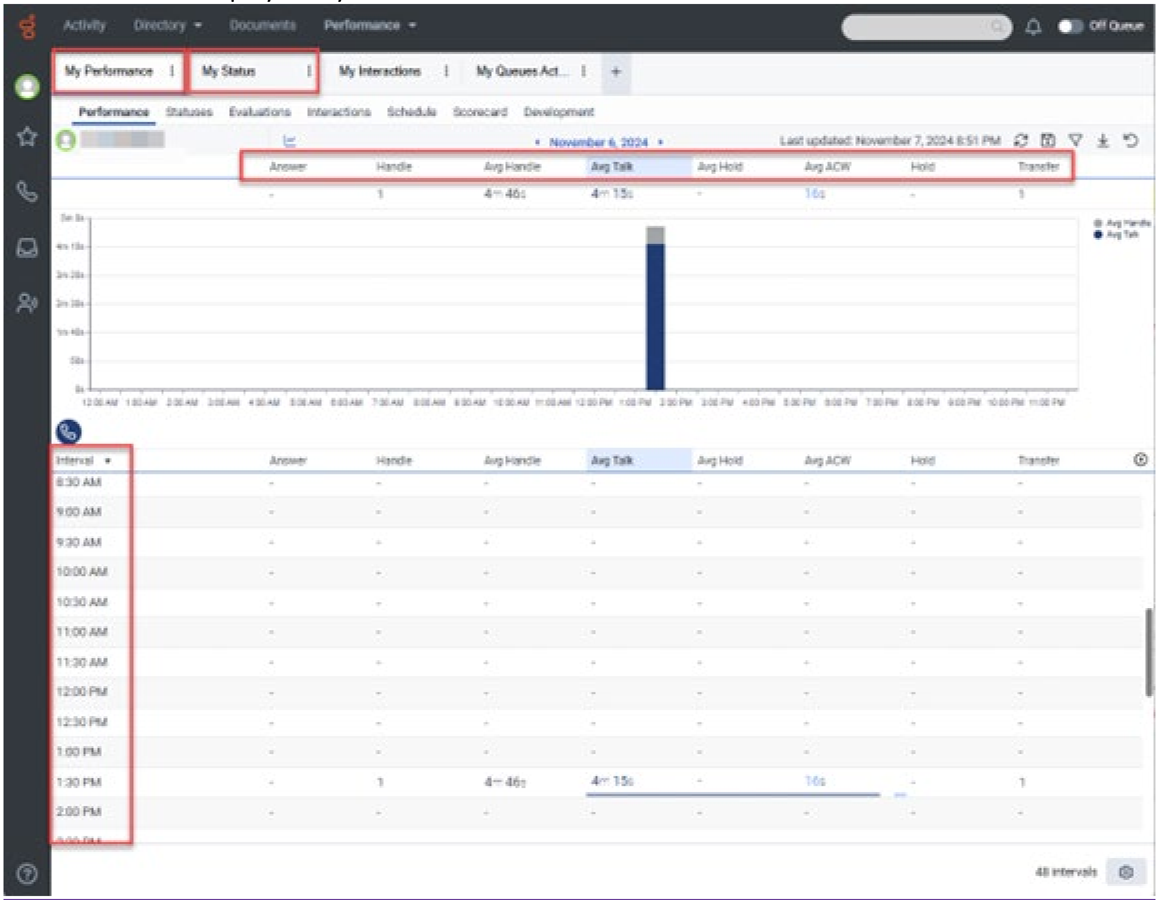


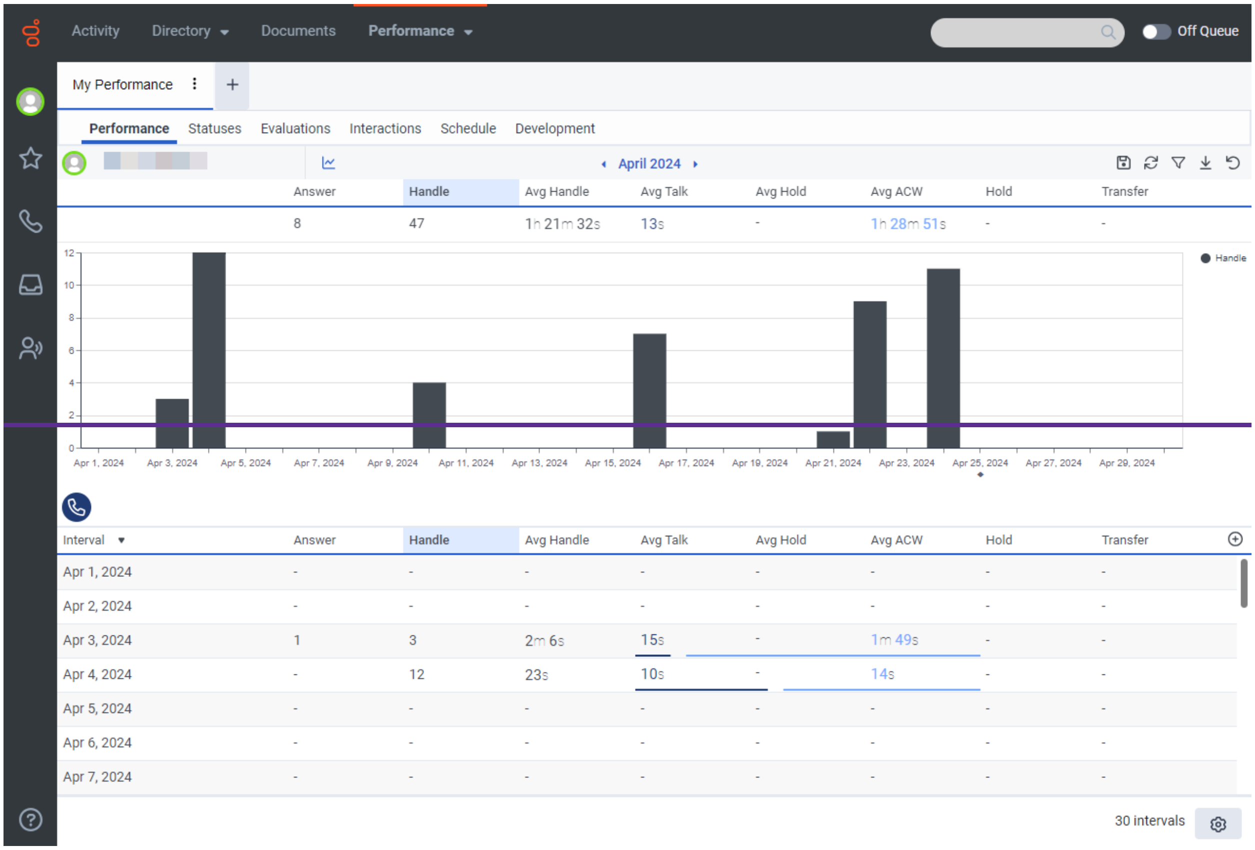

Activity
Directory
Documents
Performance
Off Queue
My Performance
New Tab
Select a view to load by clicking its name:
Default
Search Views
Time zone
America/Chicago (UTC-05:00) (Local and Works...
Employee Engagement
My Development
My Performance
My Development
My Evaluations
My Interactions
My Performance
My Queues Activity
My Schedule
My Status
Other
Scheduled Exports
Saved
Search Saved Views
Name
Base
Time Pe...
Time Zone
Entities
Entity C...
Test
My Interactions
None
-
-
0

You can perform this step multiple times until all desired tabs are displayed. Recommended views include: My Interactions, My Performance, My Queues Activity, and My Status.



On the My Performance ~~and~~ (or Performance) and My Status (or Statuses) pages, the top row displays the summary row for each metric's average over the selected time period. If you select one of the summary metrics (Answer, Handle, Avg Handle, Avg Talk, Avg Hold, Avg ACW, Hold or Transfer) a chart displays, and a table below that displays daily details in half hour intervals.

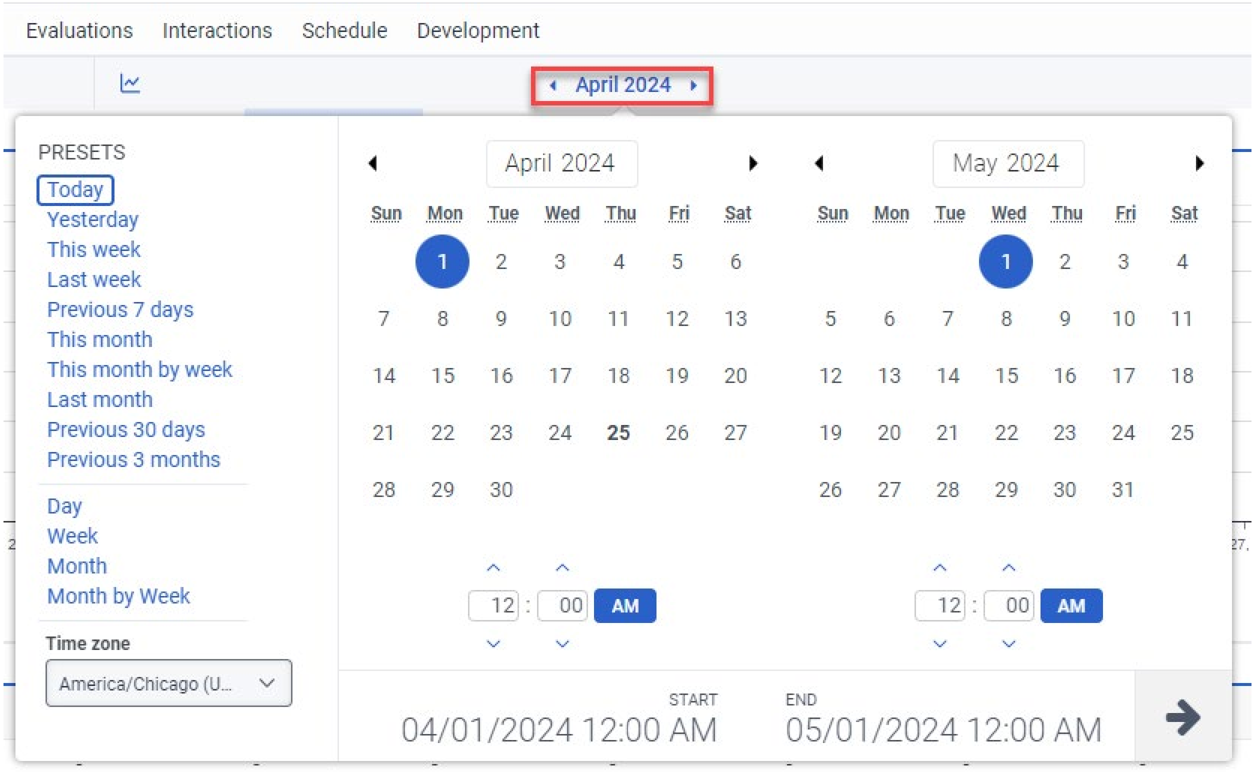




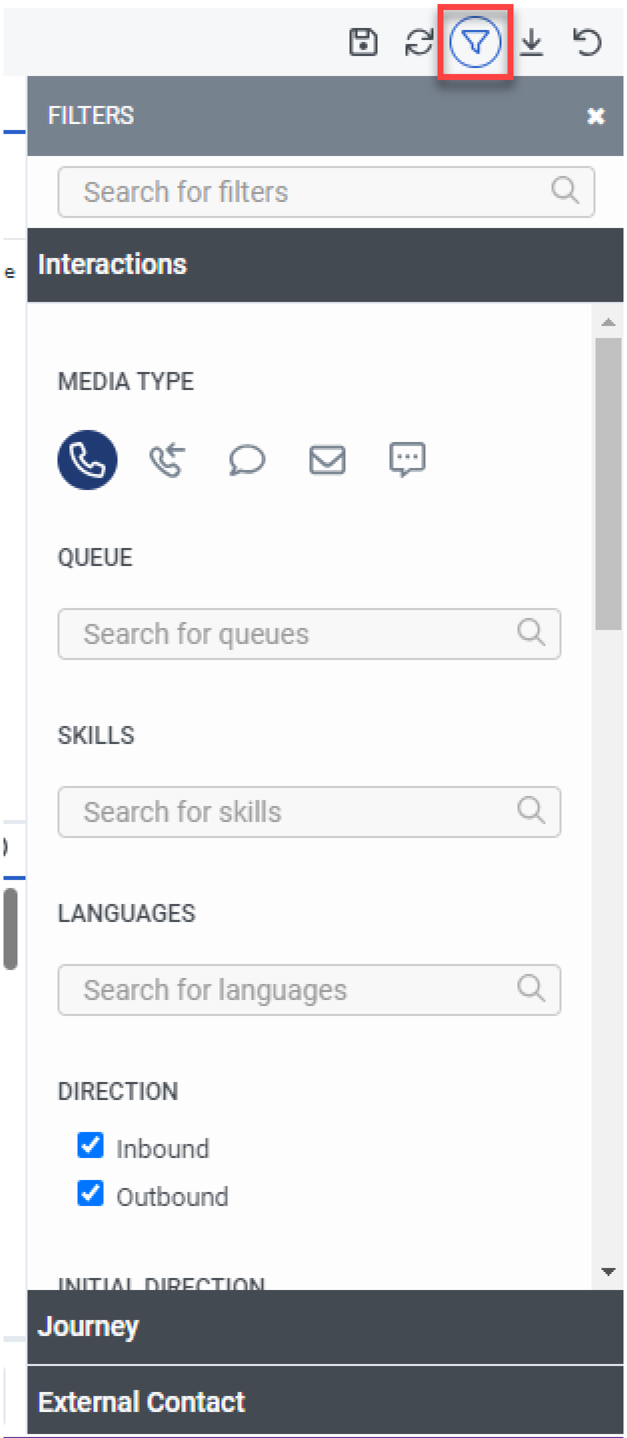
~~Note that internal calls (Genesys user to Genesys user) may not be displayed in the Performance view.~~

Note	Internal calls (Genesys user to Genesys user) may not be displayed in the Performance view.

Change the time period by clicking the date filter (blue date at the top center of the tab) and selecting a time preset or entering a specific range.

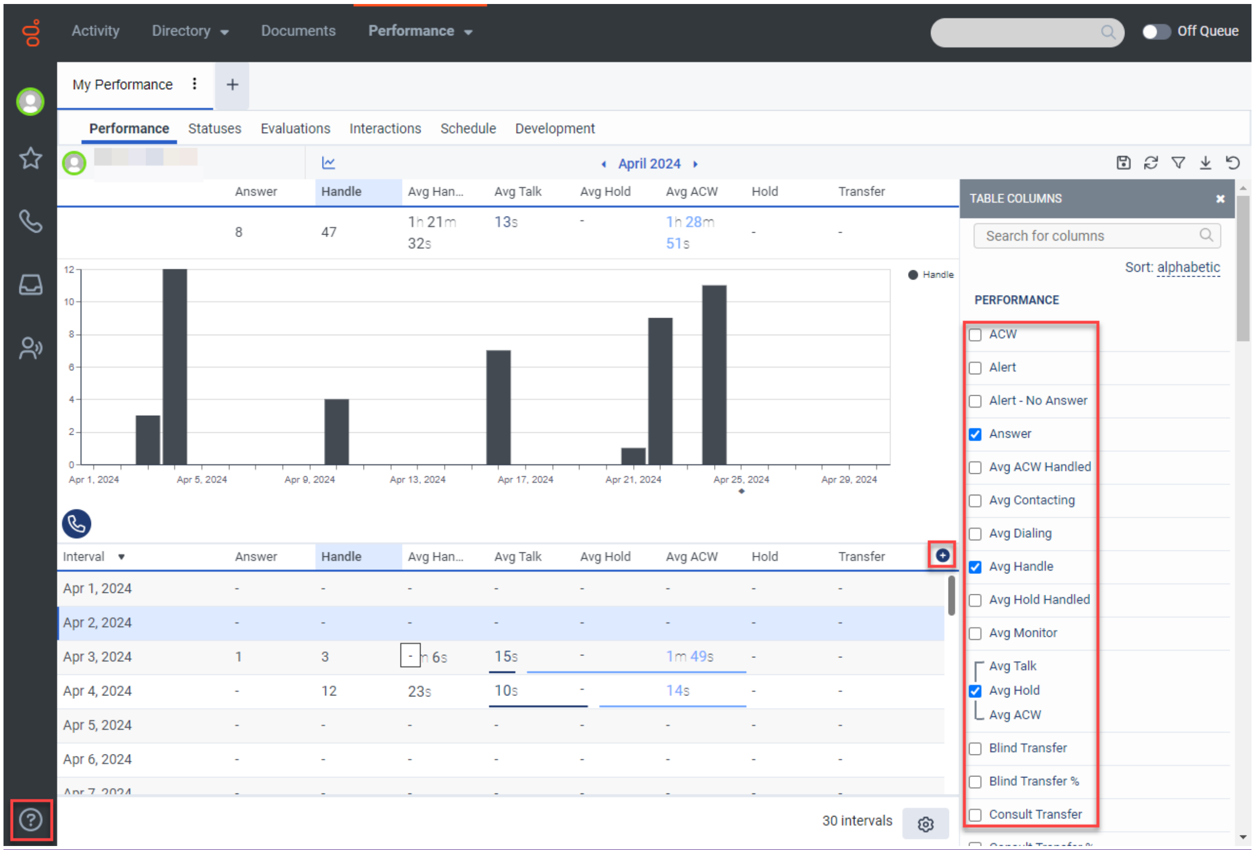


Click the filter button on the top right side of the tab to choose one or more filters for the displayed metrics.

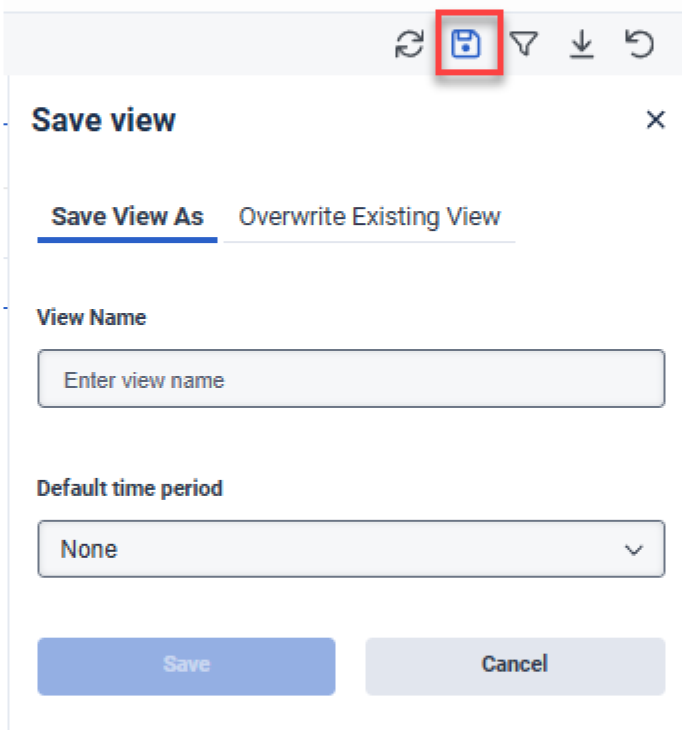


For details about the information displayed in each column, click the help button in the bottom of the communications sidebar and scroll down to Available Columns. Note that the term Automatic Call Distribution (ACD) is used in the help files. ACD refers to inbound calls in the queue.

To add additional metrics, click the plus button on the far right of the workspace and select columns from the list.

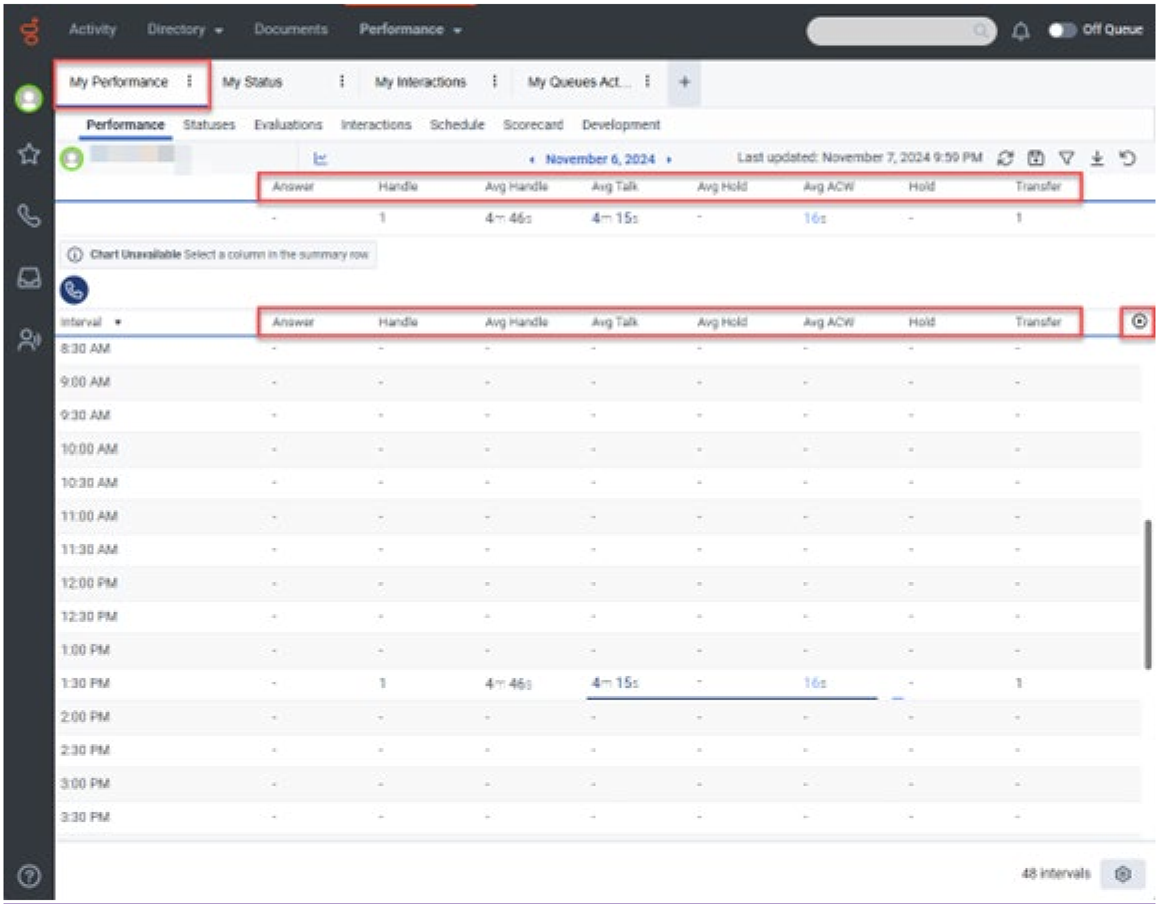


Click the save button to save your desired view.



3.2.1 My Performance

The My Performance view displays several metrics. Click the plus button on the right side of the view to add or remove metrics.

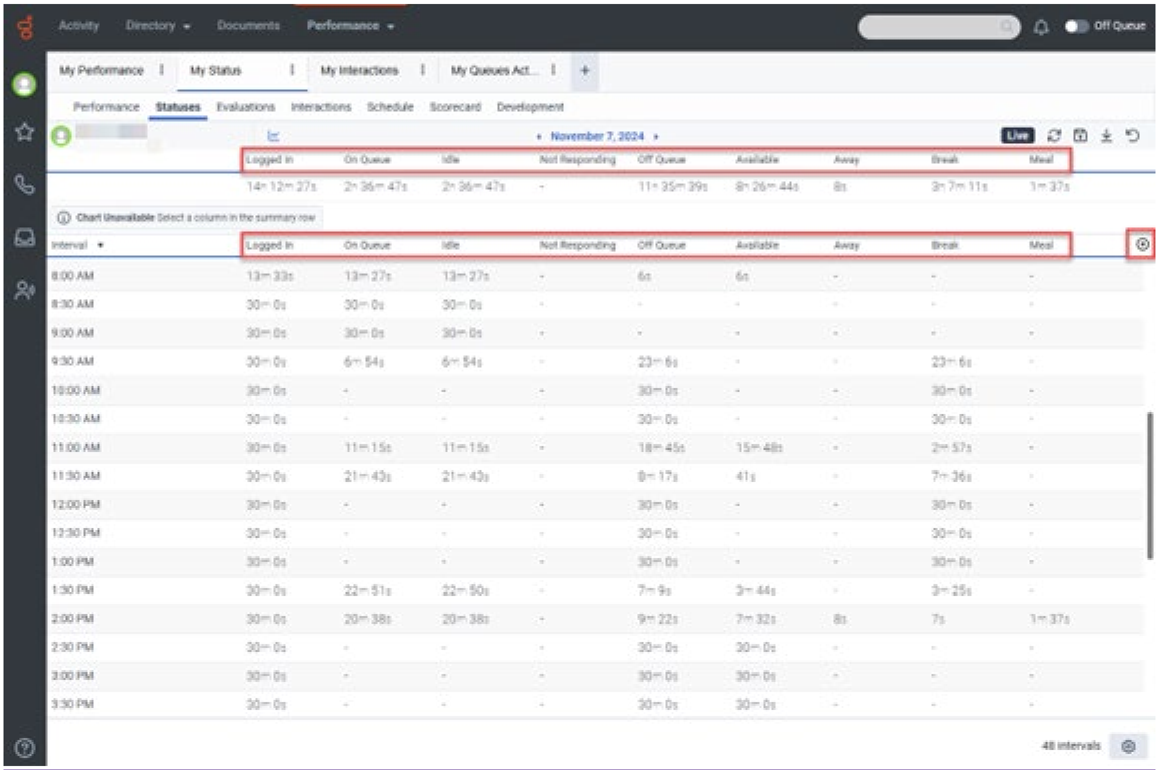


Metric	Description	Live Update
Answer	A measurement of the number of assigned ACD interactions answered by an agent in a given period. Answered increments when the agent is the first to connect to the interaction.	Yes
Handle	The total number of ACD and non-ACD interactions that agents were involved in for the selected media type. Handle increments in the interval in which the interaction ends, after the agent completes any after-call work and completes the interaction.	Yes
Avg Handle	The average amount of time agents spent handling interactions. Calculated: Includes talk time, hold time, and after-call work. For outbound calls it also includes dialing and contacting time.	Yes

Avg Talk	The average number of seconds spent interacting on a media type. Calculated: Total Talk Time / Count of Interactions with Talk Time	Yes
Avg Hold	The average number of seconds that interactions were placed on hold. Calculated: Total Hold Time / Count of Interactions	Yes
Avg ACW	The average amount of time agents spent completing after-call work. Calculated: Total ACW / Interactions with ACW	Yes
Hold	The number of interactions with holds.	Yes
Transfer	A measurement of the number of interactions an agent answered in one queue and then then transferred. A transfer counts for the queue in which an agent answers the interaction. Calculated: Number of interactions blind transferred or consult transferred	Yes

3.2.2 My Status

The My Status view displays several metrics. Click the plus button on the right side of the view to add or remove metrics.

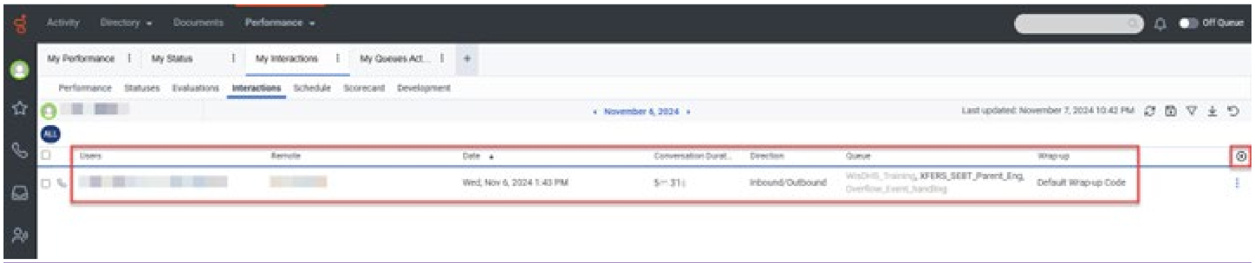


Metric	Description	Live Update
Logged In	The total amount of time a user is logged in for the specified period.	Yes
On Queue	The On Queue metric represents the number of agents that are on queue for a specific queue.	Yes
Idle	The amount of time an agent spends in the Idle routing status. This routing status represents agents who are On Queue and able to take interactions but are not currently working with interactions.	Yes
Not Responding	The amount of time an agent spends in the Not Responding routing status after not accepting an interaction. The Not Responding routing status is when an agent was On Queue or Interacting and did not answer an offered interaction. The agent could still be handling and completing other previous interactions. While Not Responding, the agent does not receive new interactions.	Yes

Off Queue	Off Queue represents the number of agents that are off queue for a specific queue. These agents are in another status, such as Available, Busy, Away, Break, Meal, Meeting, or Training. Agents in Out of Office and Offline statuses are not included in this number.	Yes
Available	Time spent in the Available status for the specified period.	Yes
Away	Time spent in the Away status for the specified period.	Yes
Break	Time spent in the Break status for the specified period.	Yes
Meal	Time spent in the Meal status for a specified period.	Yes

3.2.3 My Interactions

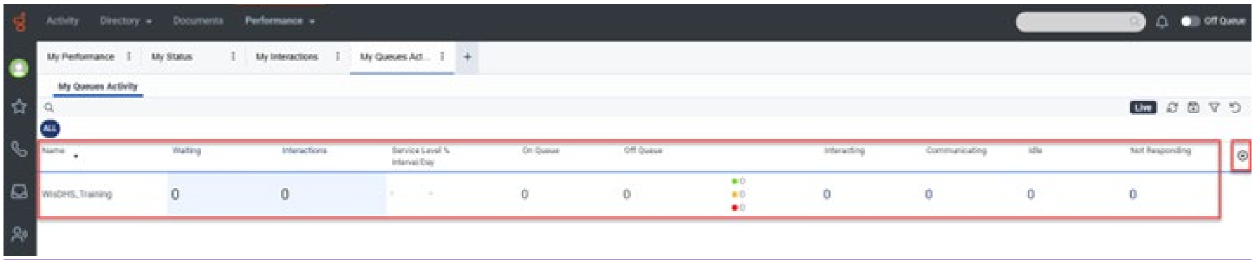
The My Interactions view displays several metrics. Click the plus button on the right side of the view to add or remove metrics.



Metric	Description
Users	The internal users alerted or involved.
Remote	Information about the external participants. Note: PII is masked in this view.
Date	The date the interaction started.
Conversation Duration	The length of the interaction. Calculated: (Conversation End – Conversation Start)
Direction	Whether the interaction was inbound, outbound, or inbound/outbound.
Queue	The associated queues.
Wrap-up	The wrap-up code selected by the agent.

3.2.4 My Queues Activity

The My Queues Activity displays several metrics. Click the plus button on the right side of the view to add or remove metrics.



Metric	Description	Live Update
Name	The name of the queue.	Yes
Waiting	The number of interactions that waited in the queue.	Yes
Interactions	The number of interactions assigned to that queue that agents are currently interacting with.	Yes
On Queue	The number of agents that are on queue for a specific queue.	Yes
Off Queue	The number of agents that are off queue for a specific queue. These agents are in another status, such as Available, Busy, or Meeting. Agents in the Out of Office and Offline statuses are not included in this number.	Yes
Interacting	The number of agents working with interactions. The number includes agents completing after call work.	Yes
Communicating	The agent is on a non-ACD call, and, in relation to agent utilization and call routing, Genesys Cloud treats the non-ACD call like an ACD call.	Yes
Idle	The number of agents who are on queue and available to take interactions but who are not working with interactions.	Yes
Not Responding	An agent was On Queue or Interacting and did not answer on offered interaction. The agent could still be handling and completing other previous interactions. While Not Responding, the agent does not receive new interactions.	Yes

4 Call Handling

This section describes how to receive a call, make a call, place a call on hold, and transfer a call.

4.1 Receiving a Call From a Queue

(Video instructions available: Receiving a Call From a Queue)

To receive calls, you must be on queue. Click the toggle in the top right corner to change your queue status. Select the help button in the bottom left corner of the window for help text specific to this view.

4.1.1 Go On Queue

To receive calls, you must be on queue. If not on queue, click the toggle in the top right corner.

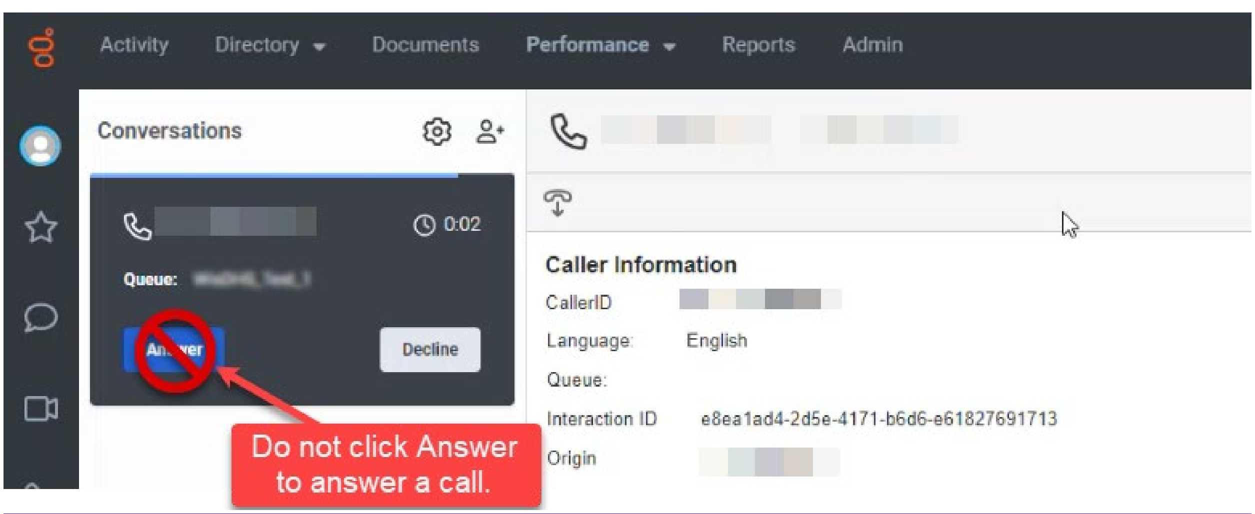
Off queue:

On queue:

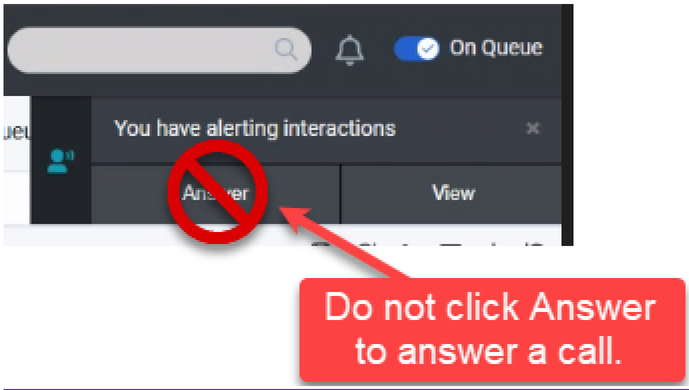
4.1.1.1 Notification of Call

Incoming call notifications display at the top of the content viewer. If the interactions pane is open, the display is on the left side of the content viewer and includes information about the call including CallerID, queue, and interaction ID.

Use your phone to answer the call. Do not click Answer on the notification.

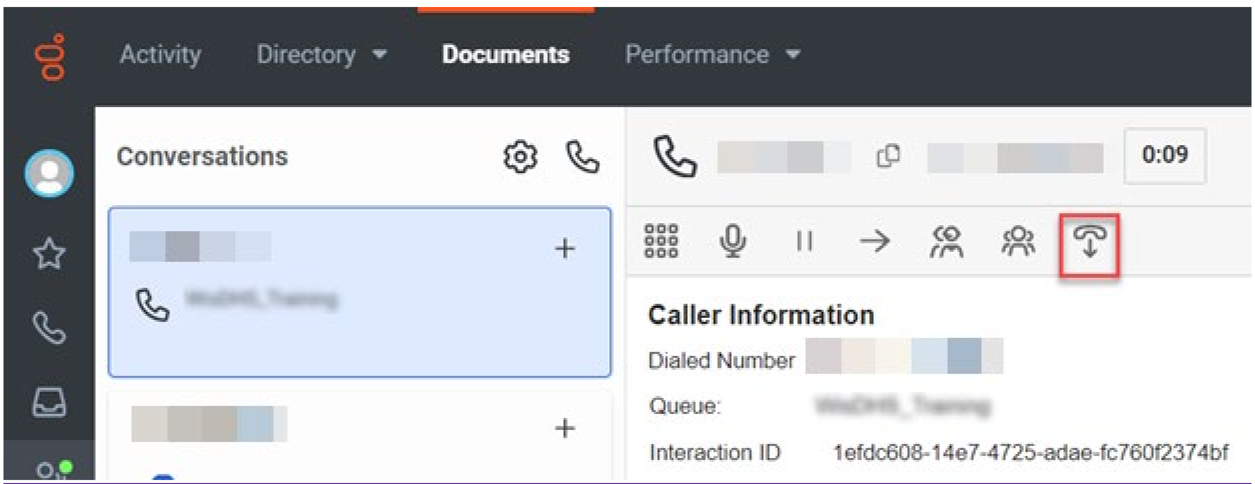


If the notification pane is not open, the call notification displays in the top right corner of the content viewer.

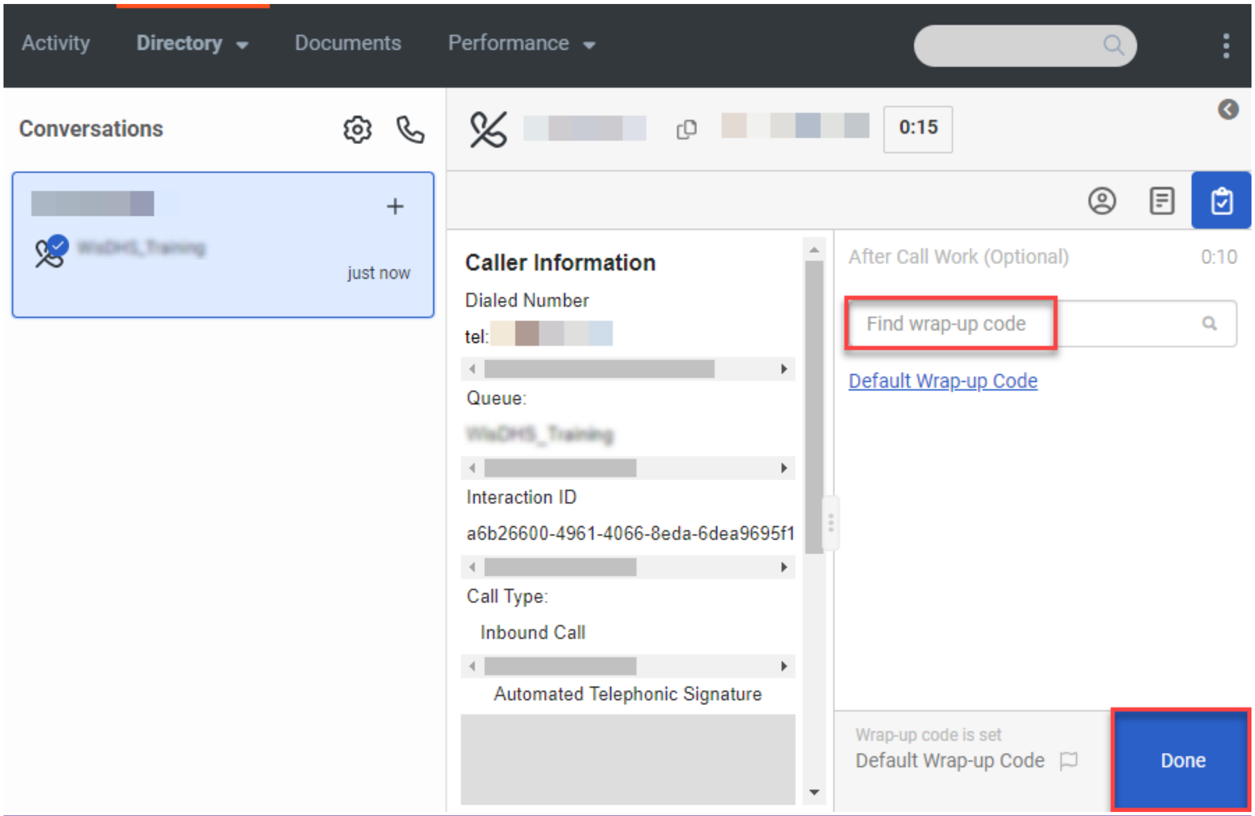


4.1.1.2 Ending a Call

Click the end call button to end the call.



The after call activities timer starts when the call ends. Note that users may need to enter a wrap-up code after they end a call if their IM agency requires it. After completing any after call work, click **Done** in the bottom right corner of the desktop to stop the after call timer and return to on queue to receive additional calls.



Note If you do not click Done following a call or listening to a voicemail, the after call timer ~~will continue~~continues to run.

4.1.2 Agent Training Call Flow

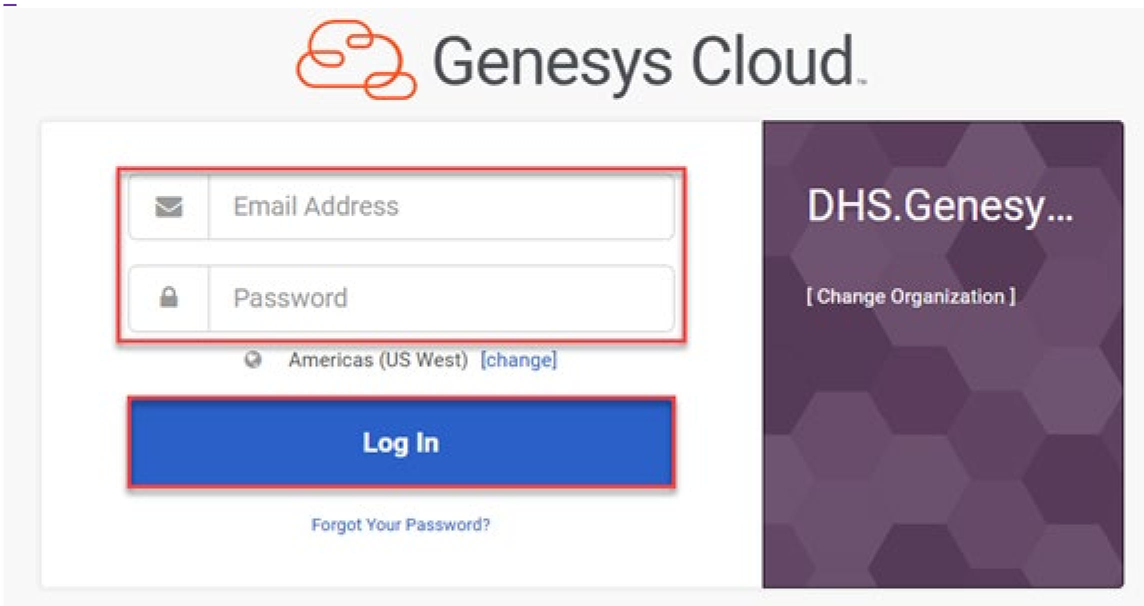
The agent training call flow is a way for the agent to practice receiving calls from the queue and to familiarize themselves with Genesys Cloud before receiving live calls. Agents can use the training call to practice using the different features in Genesys such as receiving and transferring a call, putting a call on hold, start a conference call, and consult with a call.

4.1.2.1 Receiving a Practice Call From the Queue

(Video instructions available: Receiving a Practice Call From the Queue)

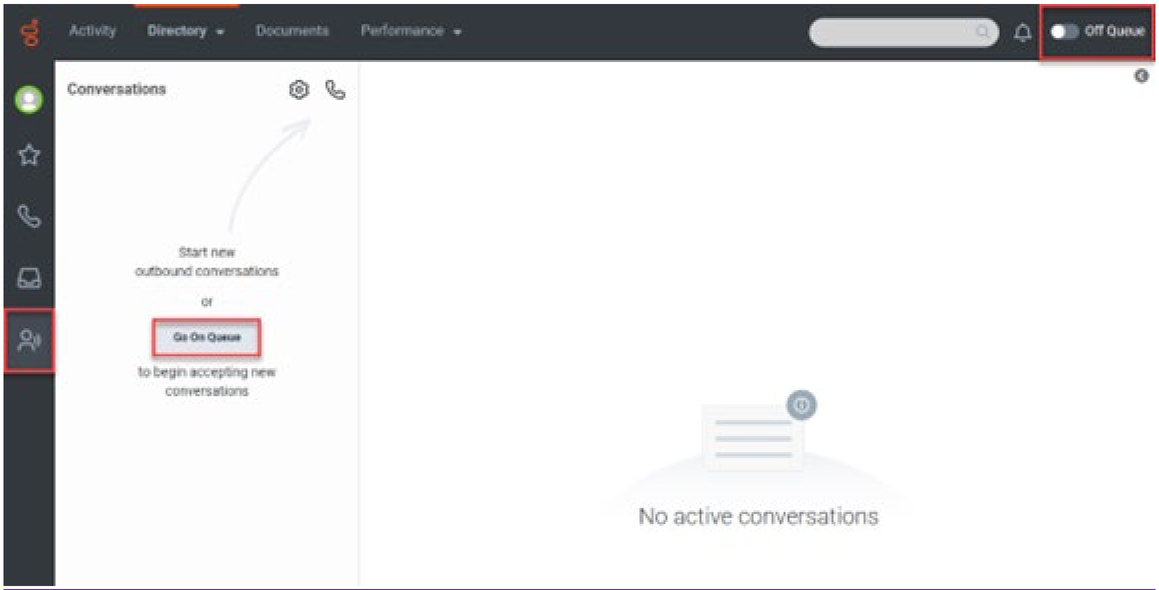
Each agent is given a five-digit training ID number received from their supervisor, Administrator, or the Genesys Cloud team. The five-digit training ID is required to receive calls from the training queue.

1. Enter your log in credentials, click Log In.



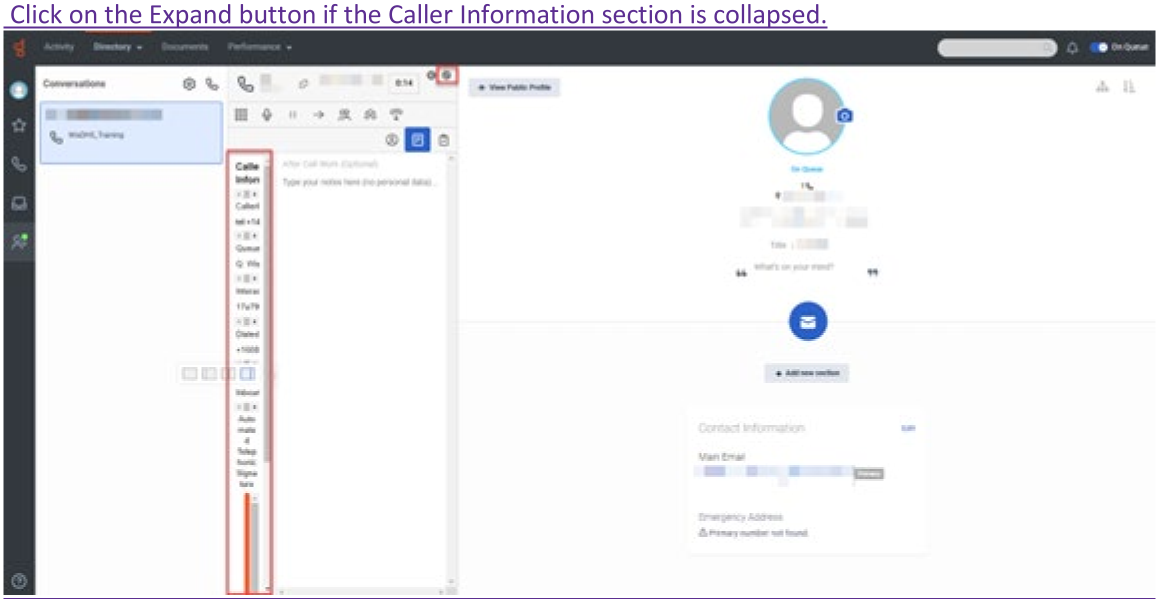
2. Click the GO On Queue button from the Interactions tab or click the Off Queue toggle button to On Queue in the main menu. By default, your status is set to Available (Off Queue) when you first log in.

Note	If the agent is assigned to other queues other than the training queue, this could result in live calls.

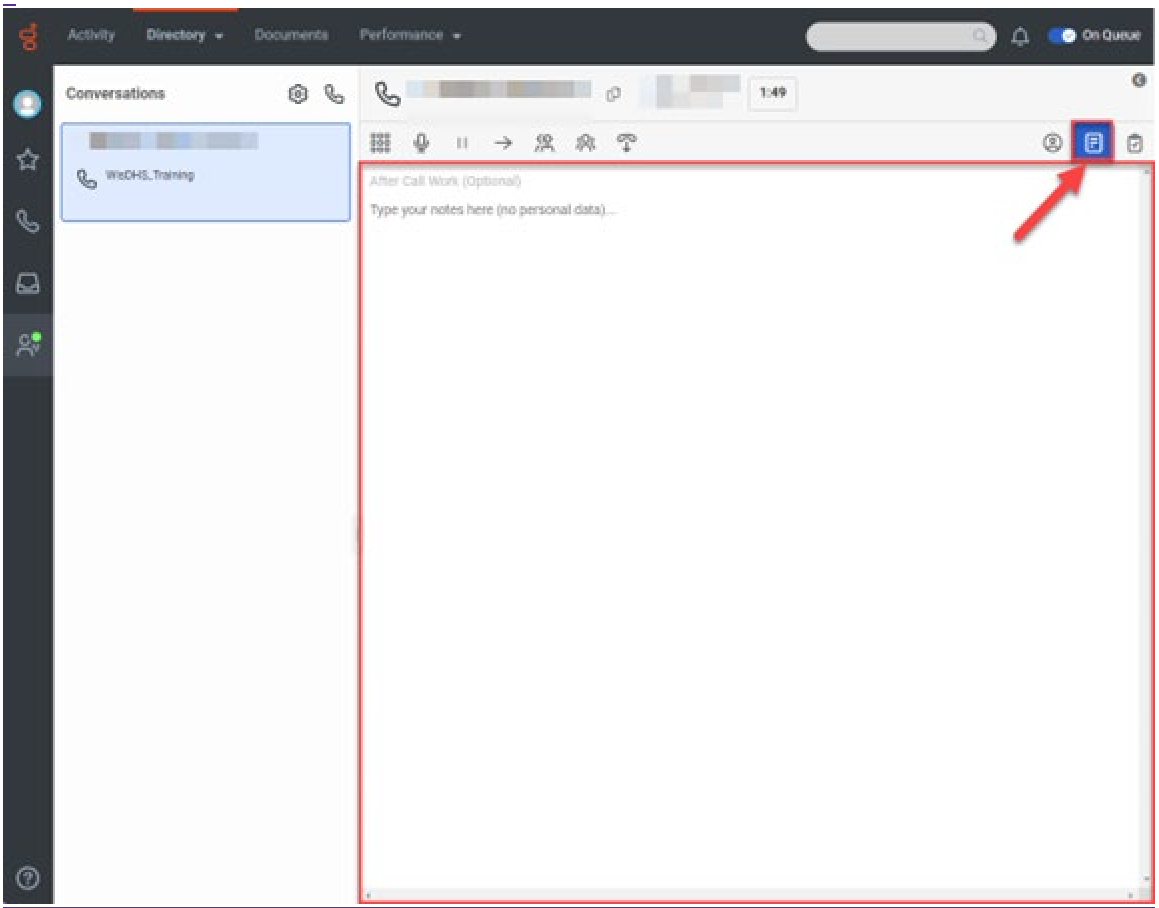


3. Dial 608-893-6918 from a phone other than your agent phone.
4. Enter your training ID when prompted.
5. You should receive a call appearing to come from the queue.
6. Do not click the Answer button in Genesys Cloud. Answer your phone. When the call comes in your screen may have different views.

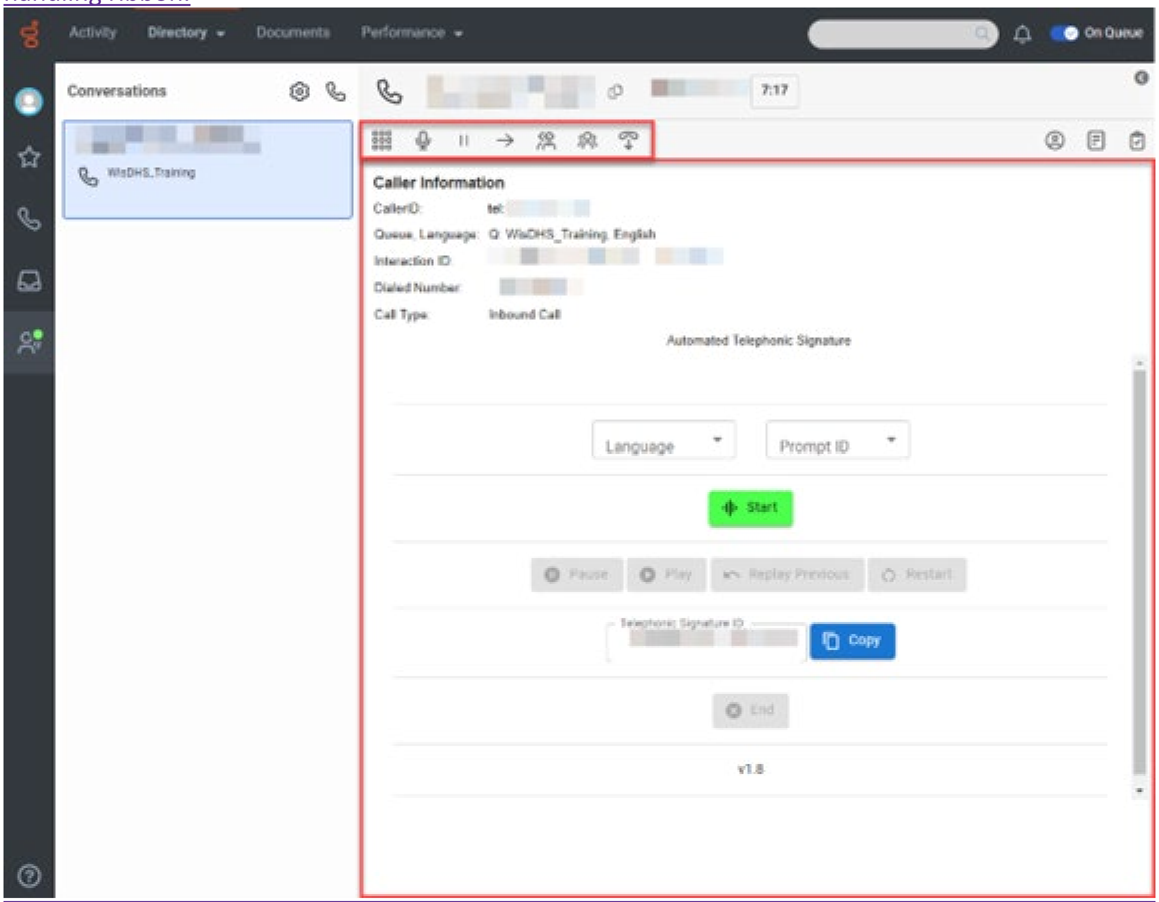
Click on the Expand button if the Caller Information section is collapsed.



Click on the notes button to see the Caller Information view.

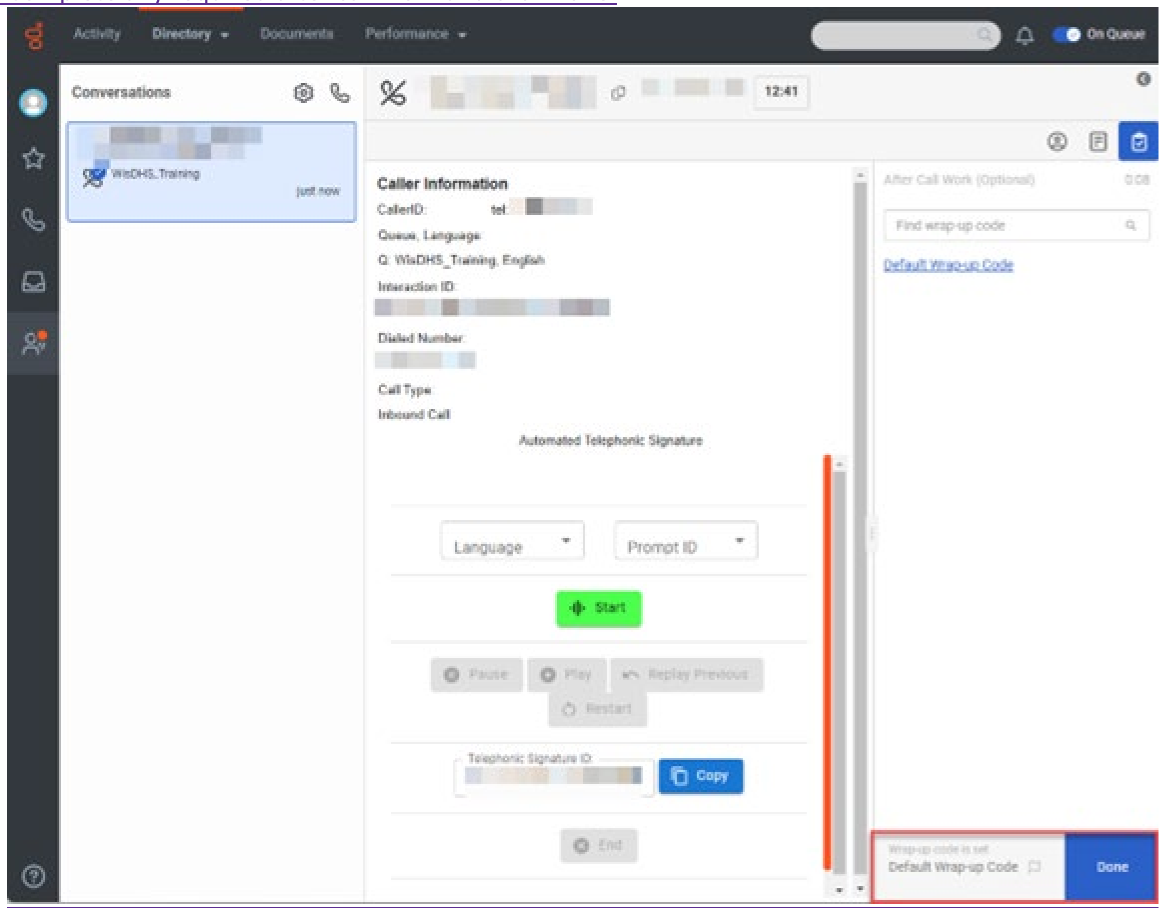

Activity
Directory
Documents
Performance
On Queue
Conversations
WisDHS_Training
1:49
After Call Work (Optional)
Type your notes here (no personal data)...

7. While on the call, notice the Caller Information section and practice the functionality within the call handling ribbon.

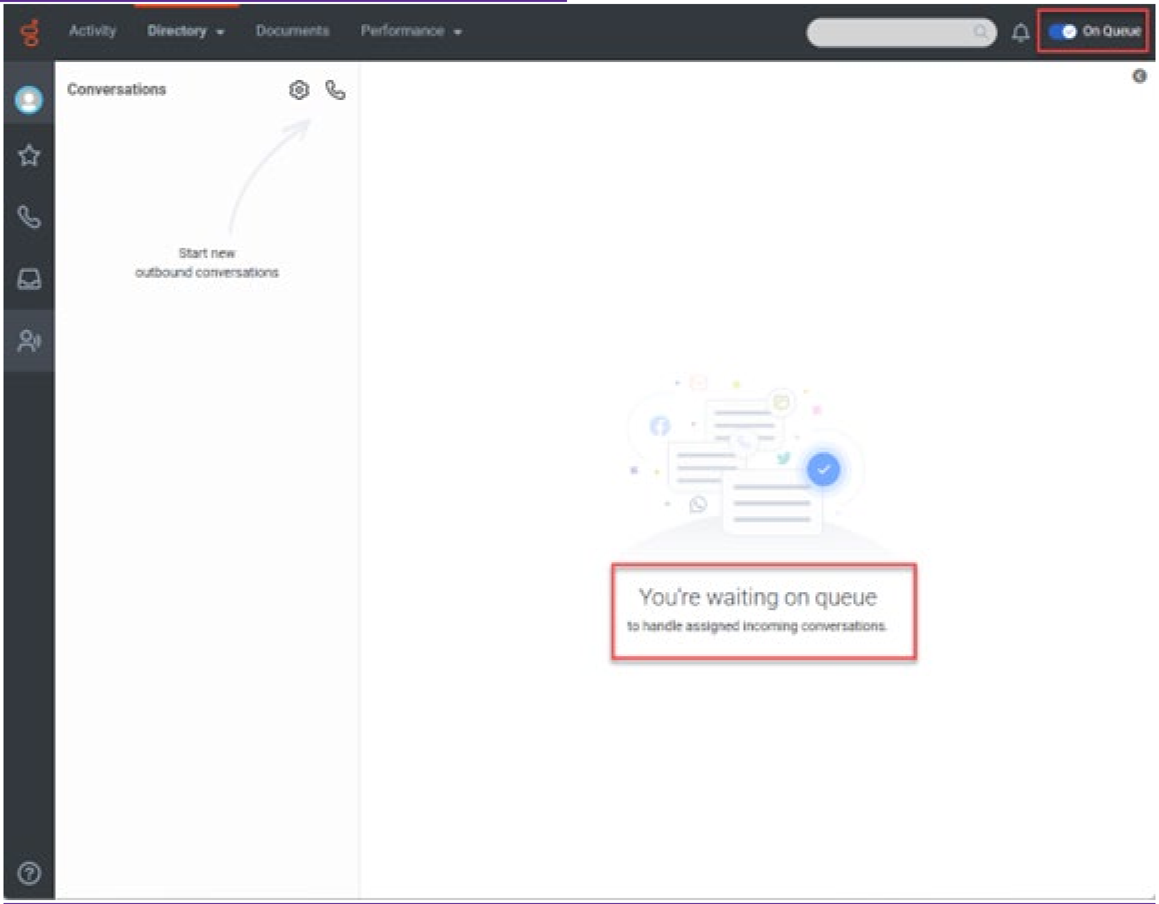


8. Once you are comfortable using the features, click on the end call button or hang up the call.

9. Complete any required after call work and click Done.



10. You are On Queue and ready to take another call.



4.3 Making an External Call

[4.3.1 Ending a Call](#)

(Video instructions available: Making an External Call)

Select the help button in the bottom left corner of the window for help text specific to this view.

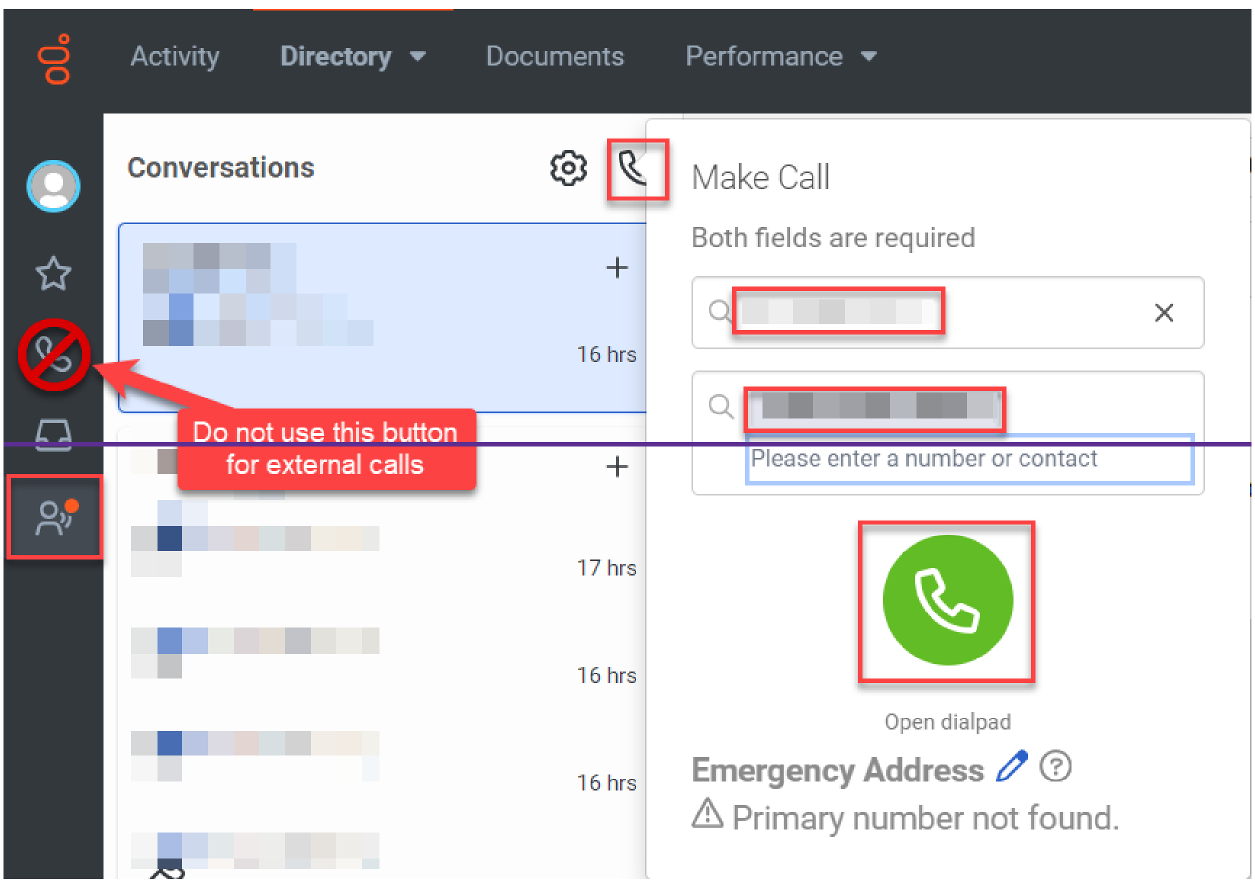
Genesys allows users to make external calls which is also known as dialing out.

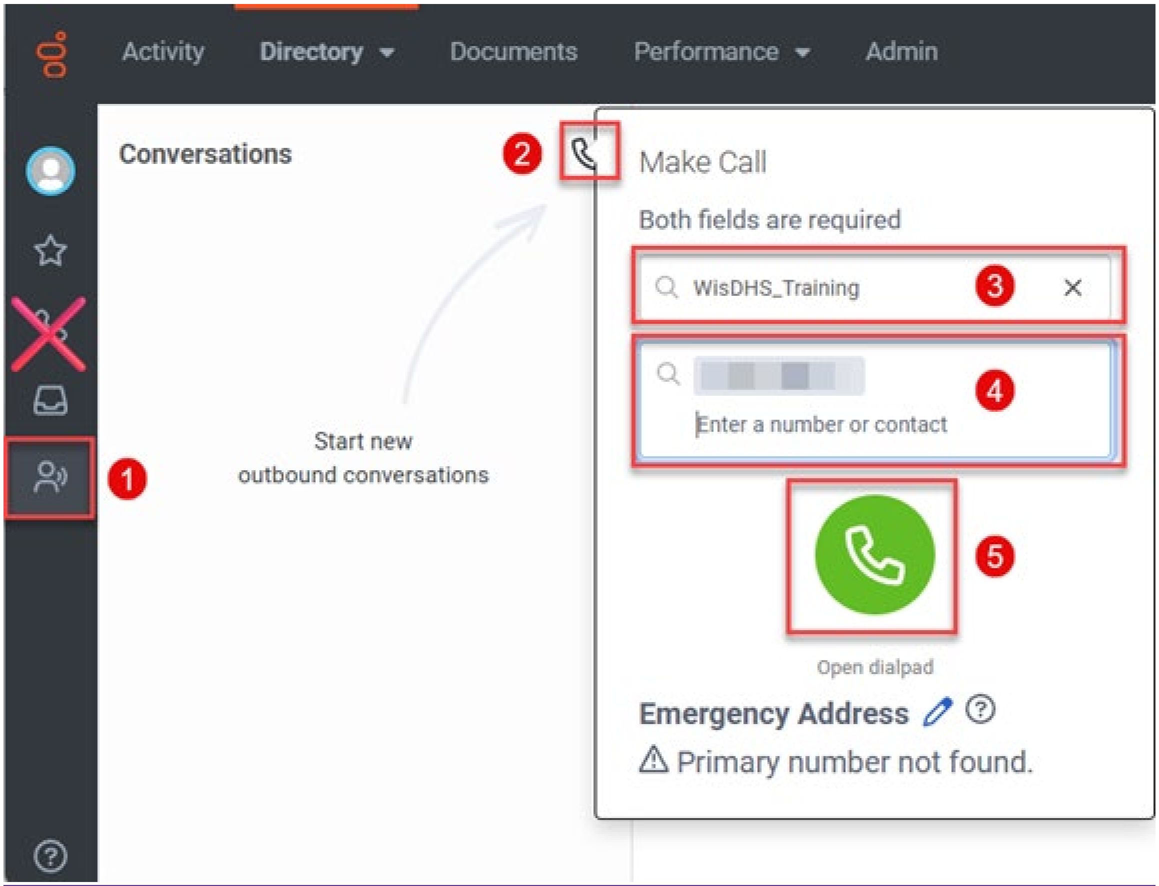
To make an external call:

1. Click the interactions button in the communications sidebar.
2. Click the telephone button in the Conversations pane.

Note	Making an external call using the phone button in the Communications Sidebar on the left does the following o Sends your telephone number to the called party's caller ID. o If you are "On Queue," you may receive calls from the queue. o Unable to complete an automated telephonic signature.

3. In the Make Call popup, select a queue. This causes the phone number associated with the queue to display in the external party's caller ID. Additionally, this makes other Genesys call features available, such as scripts and Automatic Telephonic Signature (ATS).
4. Enter the digits using your keyboard, and press the enter key.
5. Click the green call button to make the call and go off queue.

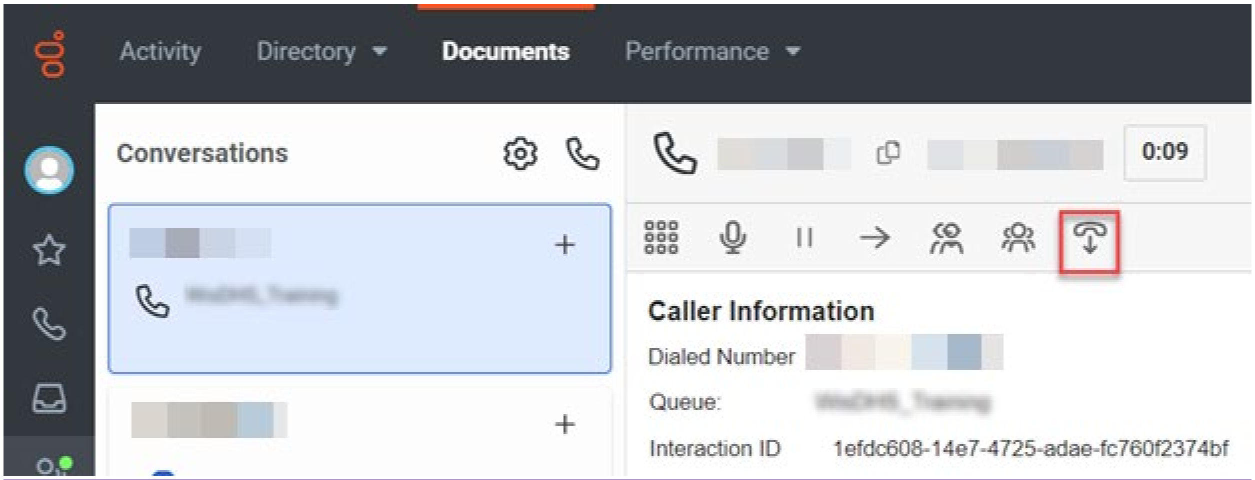




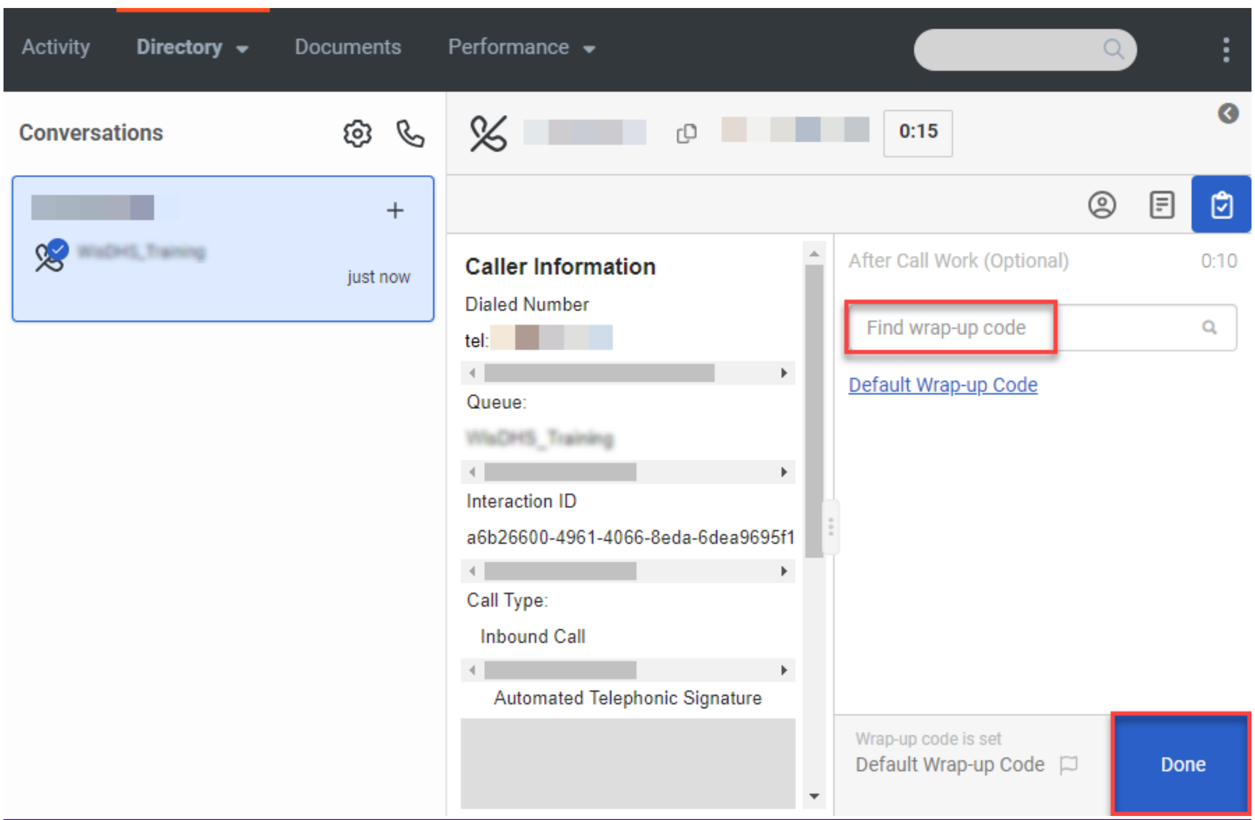
Activity
Directory
Documents
Performance
Admin
Conversations
2
Start new
outbound conversations
1
Make Call
Both fields are required
WisDHS_Training
3
4
Enter a number or contact
5
Open dialpad
Emergency Address
Primary number not found.

4.3.1 Ending a Call

Click the end call button to end the call.



The after call activities timer starts when the call ends. After entering a wrap-up code (if the IM agency requires it) and completing any after call work, click Done in the bottom right corner of the desktop. This stops the after call timer sets the queue status to on queue for additional calls.



Note	If you do not click Done following a call or listening to a voicemail, the after call timer ~~will continue~~continues to run.

4.5 Transferring a Call

~~There are three types of call transfers in Genesys: Transfer, Conference, and Consult.~~

~~4.5.1 Transferring a Call~~

4.5.1 Transferring a Call to an XFERS Genesys Queue

4.5.2 Transferring a Call to a Genesys Agent

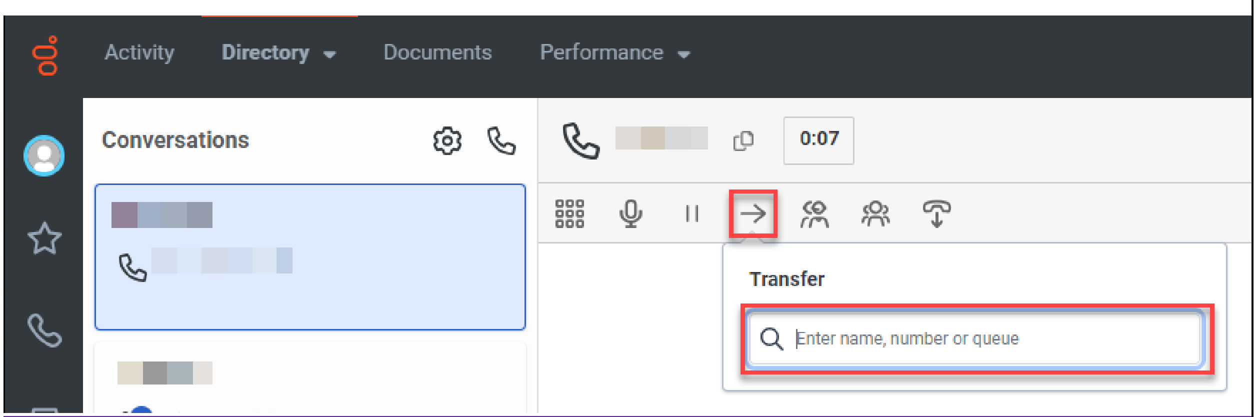
(Video instructions available: Transferring a Call)

A transfer sends a call to another party or queue without the parties speaking to one another. This is known as a cold transfer. It can be used when the caller knows where their call needs to be routed or if the Genesys user receives the call on accident and sends the call to the right department. Select the help button in the bottom left corner of the window for help text specific to this view.

To transfer a call:

1. Click the transfer button.
2. Enter a 10-digit external phone number or type the name of a Genesys user or queue into the Transfer field and press Enter.

Note	Calls can be transferred to internal Genesys users, Genesys queues, or external numbers. The other party can accept or decline the transfer.



4.5.1 Transferring a Call to an XFERS Genesys Queue

If transferring a call to a queue, it’s important to transfer the call to a queue other than the inbound queue. Under most circumstances when transferring to a queue you want to transfer to a transfer queue. Transfer queue names start with XFERS. XFERS are transfer queues and this prioritizes the transferred call (this is for most lines of business).

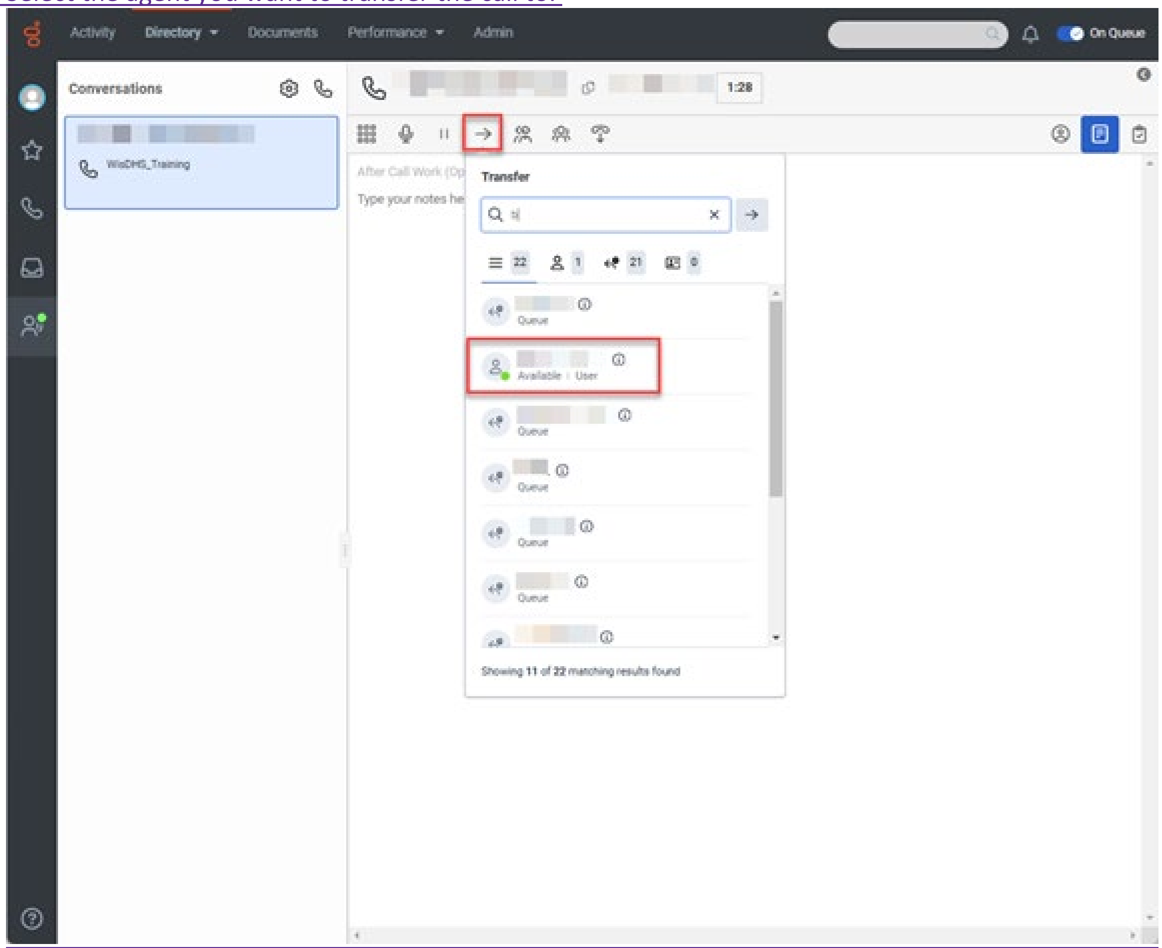
To transfer to a call to an XFERS Genesys queue:

1. Click the transfer button.
2. Type XFERS, underscore, the name of the Genesys queue into the Transfer field. For example, XFERS_Captial_CC.
3. Select the queue you are transferring the call to.

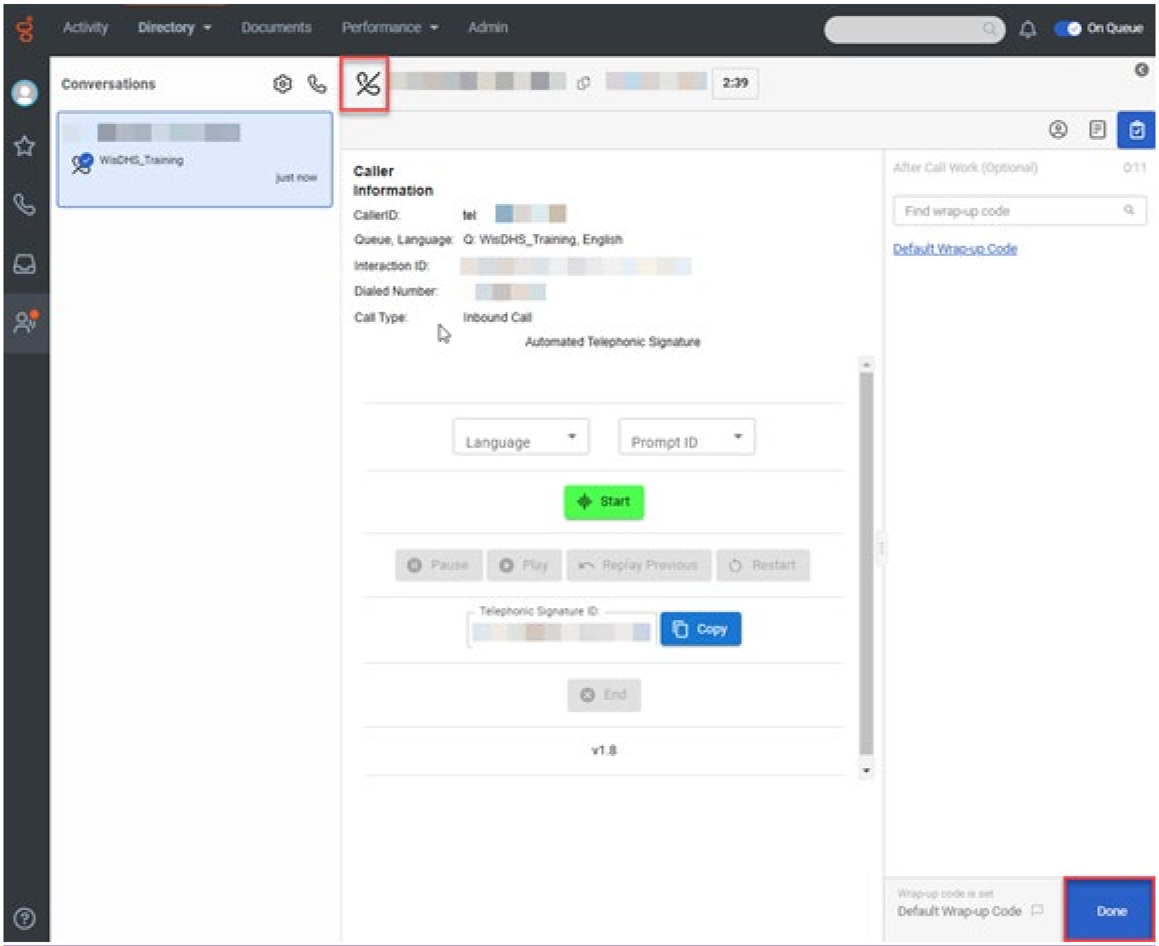
4.5.2 Transferring a Call to a Genesys Agent

To transfer a Call to another Genesys agent:

1. Click the transfer button.
2. Start typing the agent's name in the Transfer field.
3. Select the agent you want to transfer the call to.



4. After selecting the agent you want to transfer the call to, the phone rings for the other agent and you are disconnected from the call.
5. After completing any after call work, click Done in the bottom right corner to stop the after call timer.


Activity
Directory
Documents
Performance
Admin
On Queue
Conversations
WisDHS_Training
just now
2:39
Caller Information
CallerID:
tel
Queue, Language:
Q: WisDHS_Training, English
Interaction ID:
Dialed Number:
Call Type:
Inbound Call
Automated Telephonic Signature
Language
Prompt ID
Start
Pause
Play
Replay Previous
Restart
Telephonic Signature ID:
Copy
End
v1.8
After Call Work (Optional)
0:11
Find wrap-up code
Default Wrap-up Code
Wrap-up code is set
Default Wrap-up Code
Done

4.6 Conference

(Video instructions available: Conference)

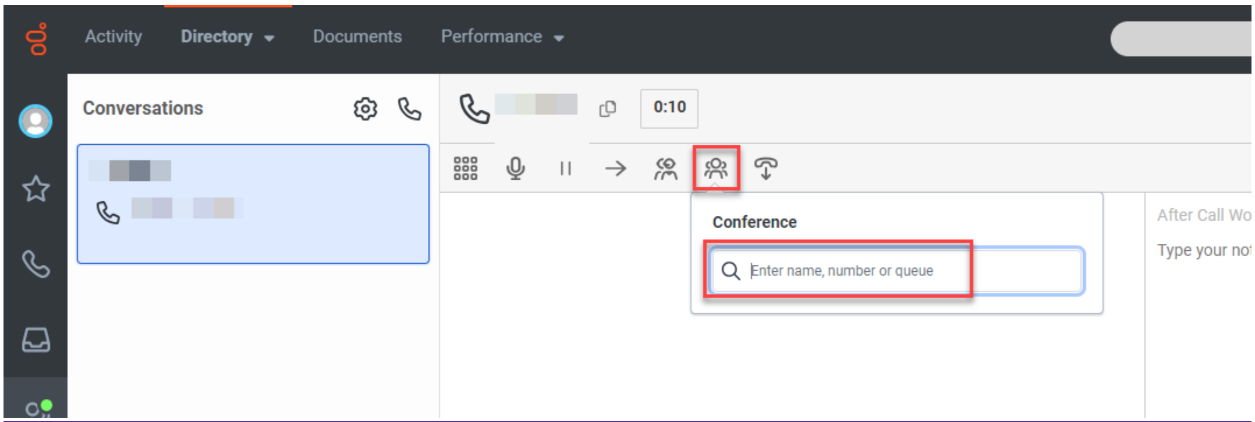
A conference adds an additional party to the call. Select the help button in the bottom left corner of the window for help text specific to this view.

4.6.1 Start a Conference

To add another party to a call:

1. Click the conference button.
2. Type the phone number or name of the second party into the Conference field and press Enter.

Note	Calls can be conferenced with internal Genesys users, Genesys queues, or external numbers. The other party can accept or decline the conference.

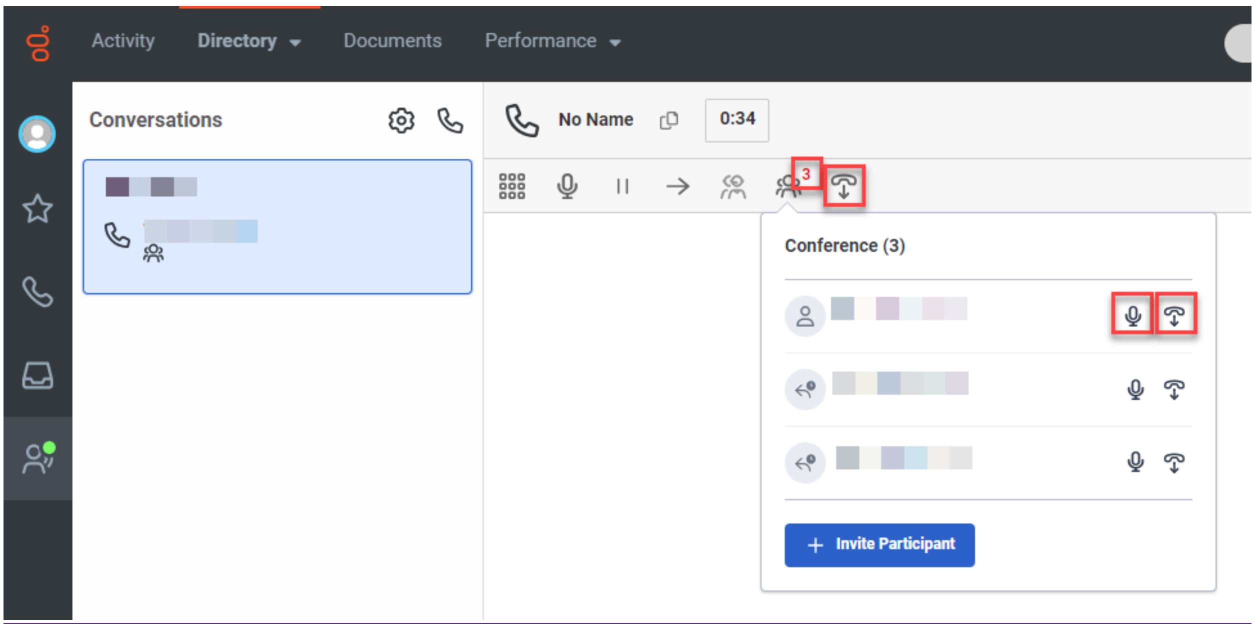


4.6.2 Place a Conferenced- Party On Hold or Remove Them From the Call

To place a caller in a conference call on hold or remove them from the call:

- Click the microphone mute the caller.
- Click the end call button next to a caller to remove the caller from the conference.
- Remove yourself from the call and leave the other two parties on the call by clicking the end call button next to your name.
- End the call for all parties by clicking the end call button next to the conference button.

Note	The number of parties on the call is indicated by a number next to the conference button.



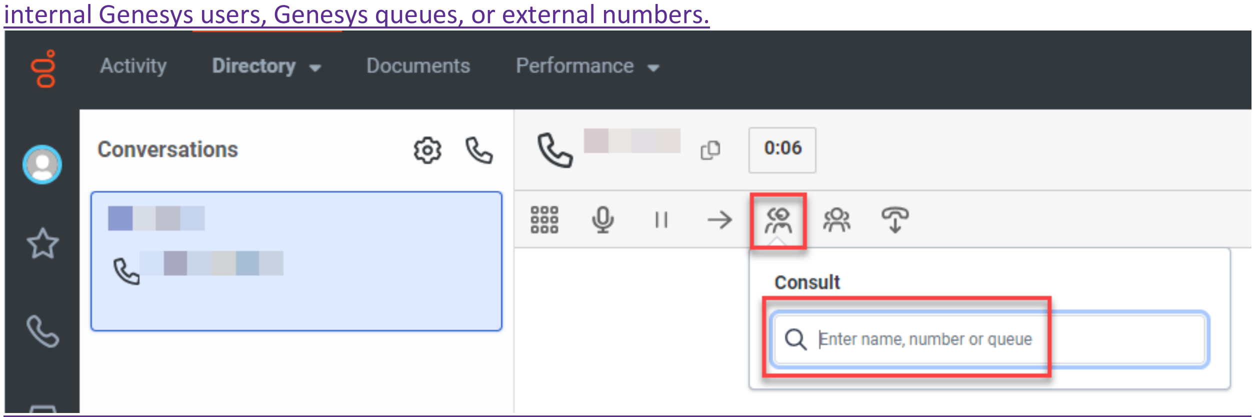
4.7 Consult

(Video instructions available: Consult)

A consult call, also known as a warm transfer, is when a party on the call calls a third party while on the line with an outside party. The outside party is placed on hold and cannot hear the conversation between the first and third parties. The first party can use the consult to discuss the call with the third party and optionally transfer it to them. Select the help button in the bottom left corner of the window for help text specific to this view.

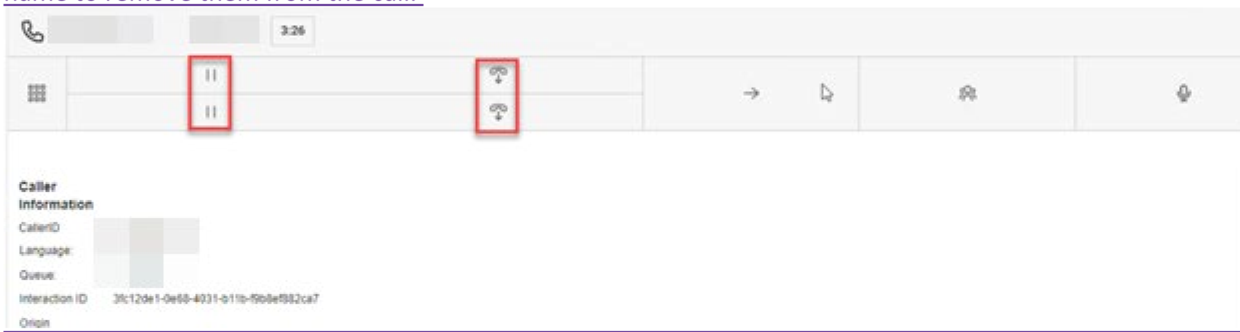
To do a consult call:

1. Click the consult button.
2. Indicate the party with whom you wish to discuss the call. Enter a 10-digit external phone number or type the name of a Genesys user or queue into the drop-down menu. Consults can be done with internal Genesys users, Genesys queues, or external numbers.



4.7.1 Place a Party On Hold or Remove Them From the Call

1. Click the microphone or end call button next to a caller to mute the caller or remove the caller from the call. You can remove yourself from the call by clicking the end call button next to the conference button.
2. Hover your cursor over the hold or end call button on the call handling ribbon to display the which party it is. Click the hold button to place either party on hold. If you need to place both parties on hold, place one party on hold and click your mute button. Or click an end call button by a party's name to remove them from the call.

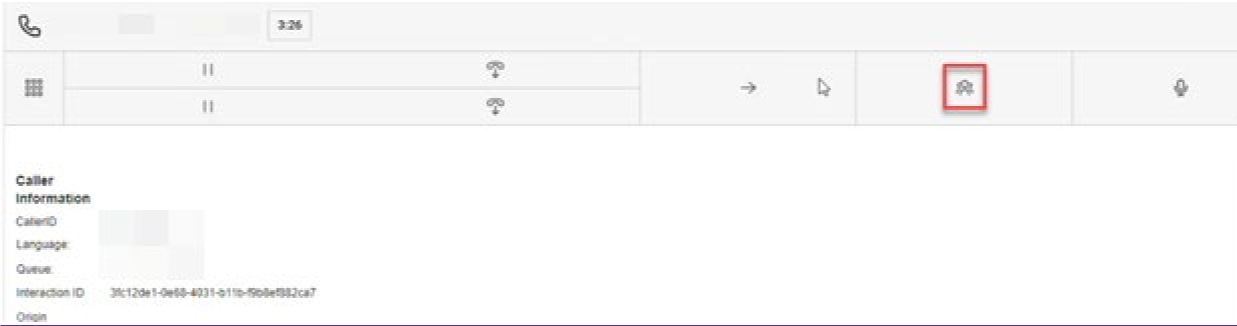


4.7.2 Transfer the Second Party to the Third Party

Click the transfer button to transfer the second party to the third party. After transferring a call, click Done to end the interaction.

4.7.3 Bring All Parties Together in a Conference Call

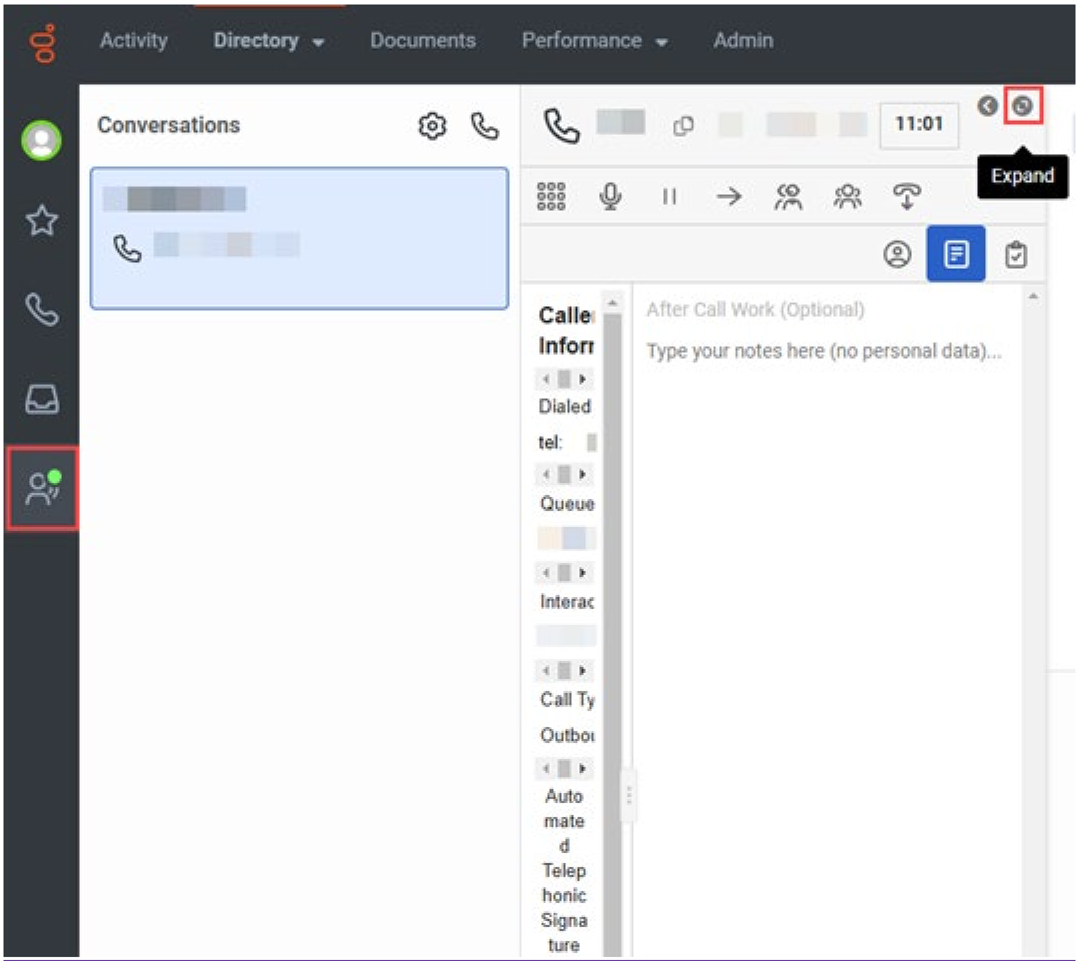
Click the conference button to bring all parties into the call.

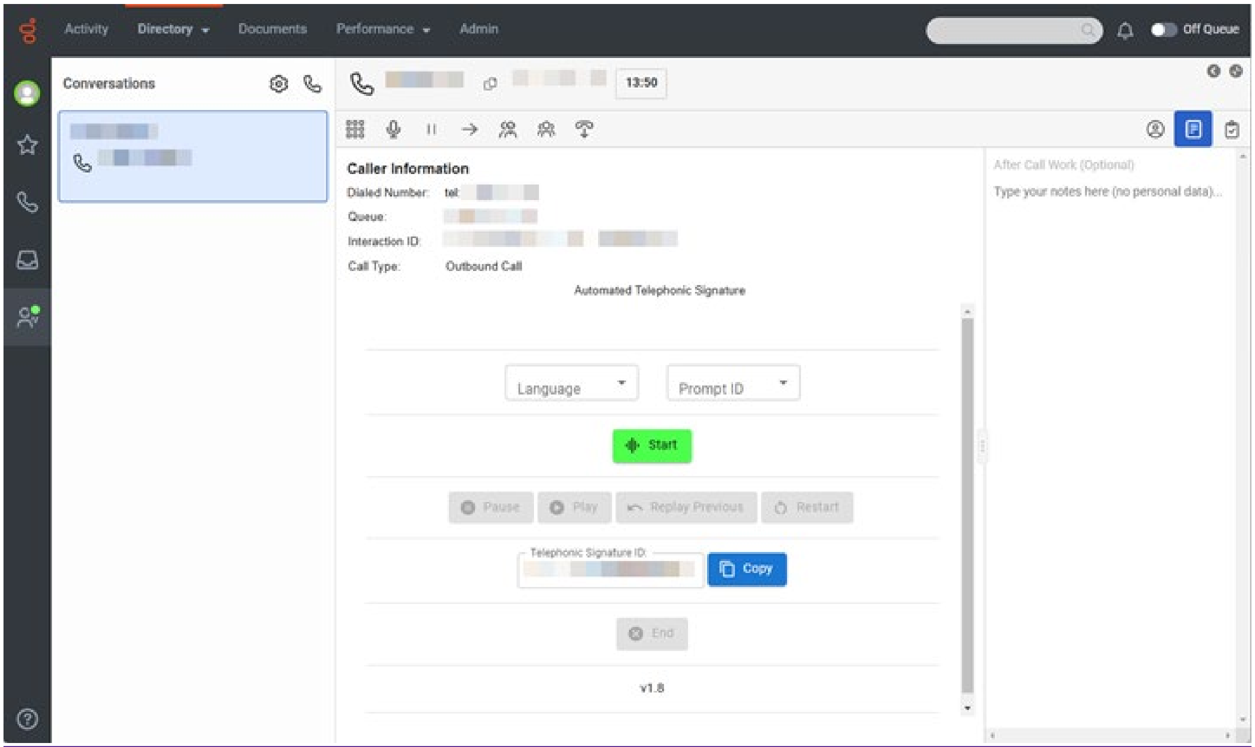


4.8 Expanding the Interactions Pane

The interactions pane allows agents to view details of the call and to access the automated telephonic signature interface.

1. Click the Expand button in top right of the pane.




Activity
Directory
Documents
Performance
Admin
Off Queue
Conversations
13:50
Caller Information
Dialed Number: tel:
Queue:
Interaction ID:
Call Type: Outbound Call
Automated Telephonic Signature
Language
Prompt ID
Start
Pause
Play
Replay Previous
Restart
Telephonic Signature ID:
Copy
End
v1.8
After Call Work (Optional)
Type your notes here (no personal data)...

4.9 Automated Telephonic Signature (ATS)

For general instructions on collecting a valid telephonic signature for Income Maintenance (IM) agencies see, Process Help Section 1.6.4 Collecting a Telephonic Signature Using Genesys CX Cloud.

6 Supervisors

This section describes the agent and queue metrics, call monitoring and coaching, and dashboards that supervisors can use.

6.1 Introduction to Performance

Use the supervisor workspace views to display agent performance, agent status, queue activity, queue performance, and dashboards. For general information about the communications sidebar and main menu, see section 3.1 Agent Desktop Content Viewer. Select the help button in the bottom left corner of the window for help text specific to this view.

The following views display agent, queue, and call information.

[…]

6.1.2 Viewing Agent Status

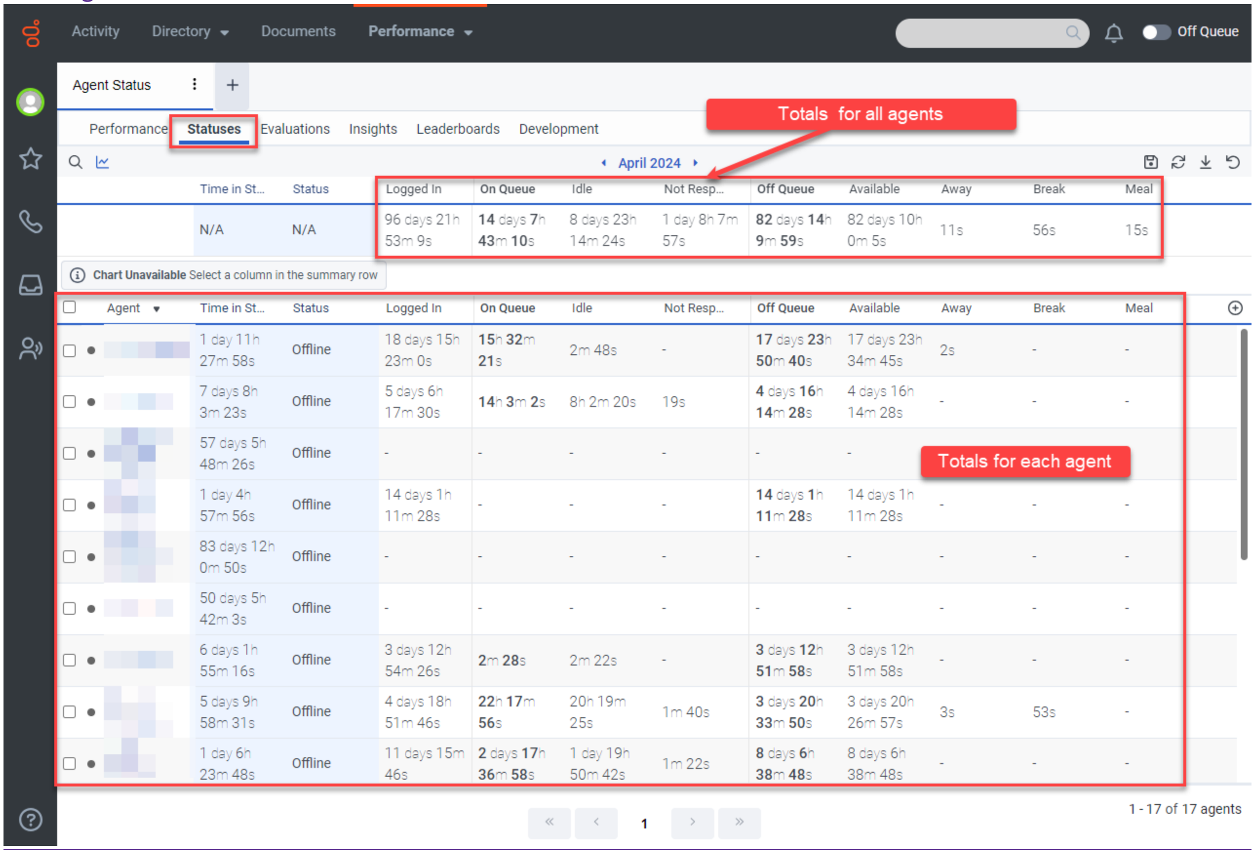
(Video instructions available: Viewing Agent Status)

The Agent Status view allows supervisors to display status-related agent metrics. Select the help button in the bottom left corner of the window for help text specific to this view.

6.1.2.1 Agent Status View

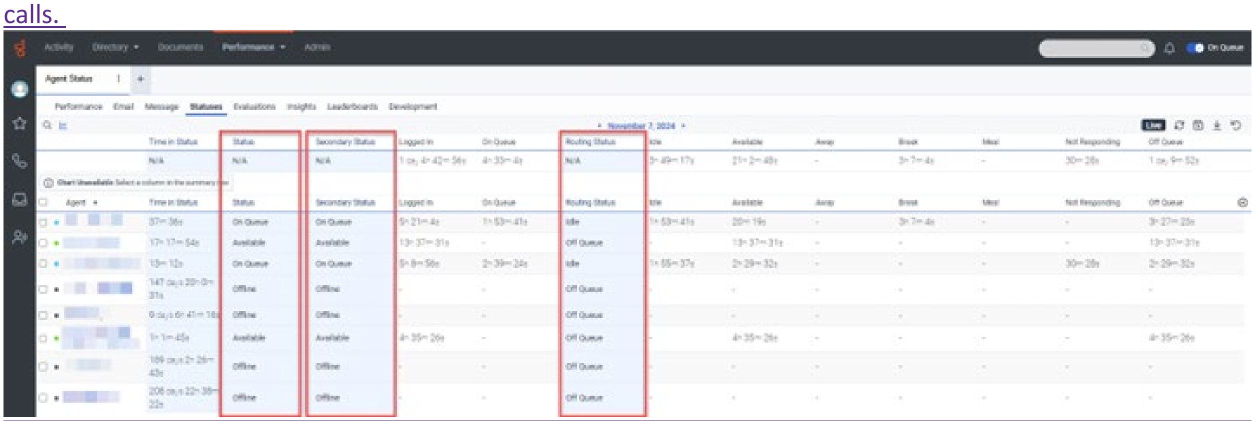
The default agent status view displays all agents in your line of business for the selected time period. The information displayed includes current status and time in that status, time logged in, time on and off queue, idle time, and time not responding for all agents. The same information plus time in status and current status is displayed for each individual agent. For information about selecting agents, filtering, exporting, saving views, and downloading, SEE SECTION 6.1 SUPERVISOR DESKTOP.

~~Viewing~~



6.1.2.2 View Status, Secondary Status, and Routing Status

When viewing an agent's current status in the Agent Status view, there are three columns to consider: Status, Secondary Status, and Routing Status. Status and Secondary Status show that an agent is on queue or in one of the other selectable statuses. Routing Status shows if the agent is available for calls.



Selectable statuses for Status and Secondary Status include:

- Available
- Busy
- Away
- Break
- Meal

- Meeting
- Training
- On Queue

All statuses selected by the agent show the agent is Off Queue, except the On Queue status.

Routing Status:

- Off Queue: Agent is Off Queue
- Idle: Agent is On Queue, but not on a call
- Interacting: Agent is either on a call or in after call work (ACW)
- Not Responding: Agent is On Queue, but did not answer their last call

If an agent is Off Queue and their Routing Status shows Interacting, it likely means they are on an outbound call or they have moved themselves Off Queue during the inbound call to avoid getting the next call.

Various Status Combinations

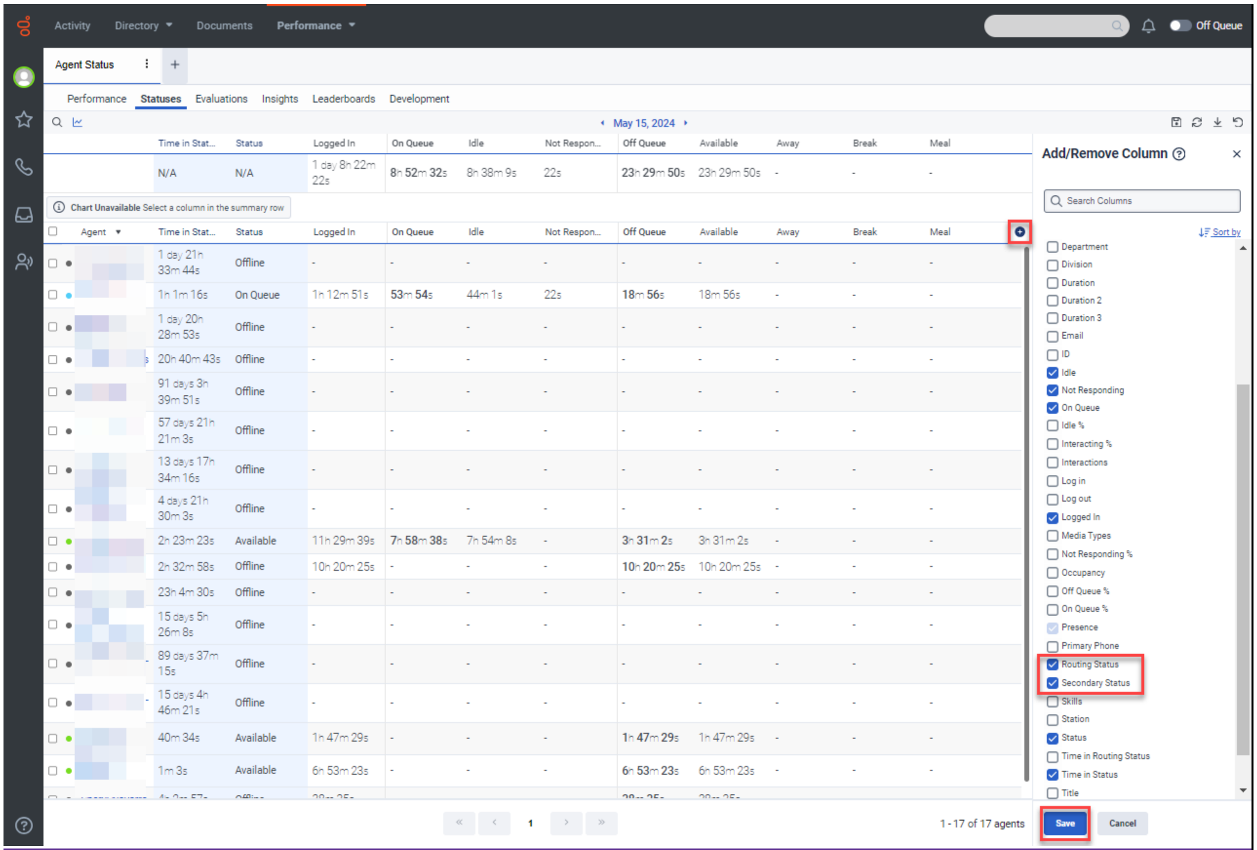
Status (selectable status)	**Secondary Status** (selectable status)	Routing Status	Description
Available	Available	Off Queue	Agent is off queue and selected available status. Available is also the default status when the agent logs in.
Break	Break	Off Queue	Agent is off queue and selected break status.
Busy	Application Processing	Off Queue	Agent is off queue and selected busy and application processing.
On Queue	On Queue	Idle	Agent is on queue and waiting for their next call.
On Queue	On Queue	Interacting	Agent is on queue and currently on a call or in ACW.
Break	Break	Interacting	Agent is off queue and either on an outbound call or the agent selected break status while on a call.
On Queue	On Queue	Not Responding	Agent is on queue but did not answer the last call offered to them.

6.1.2.3 Add Secondary and Routing Status to the Agent Status View

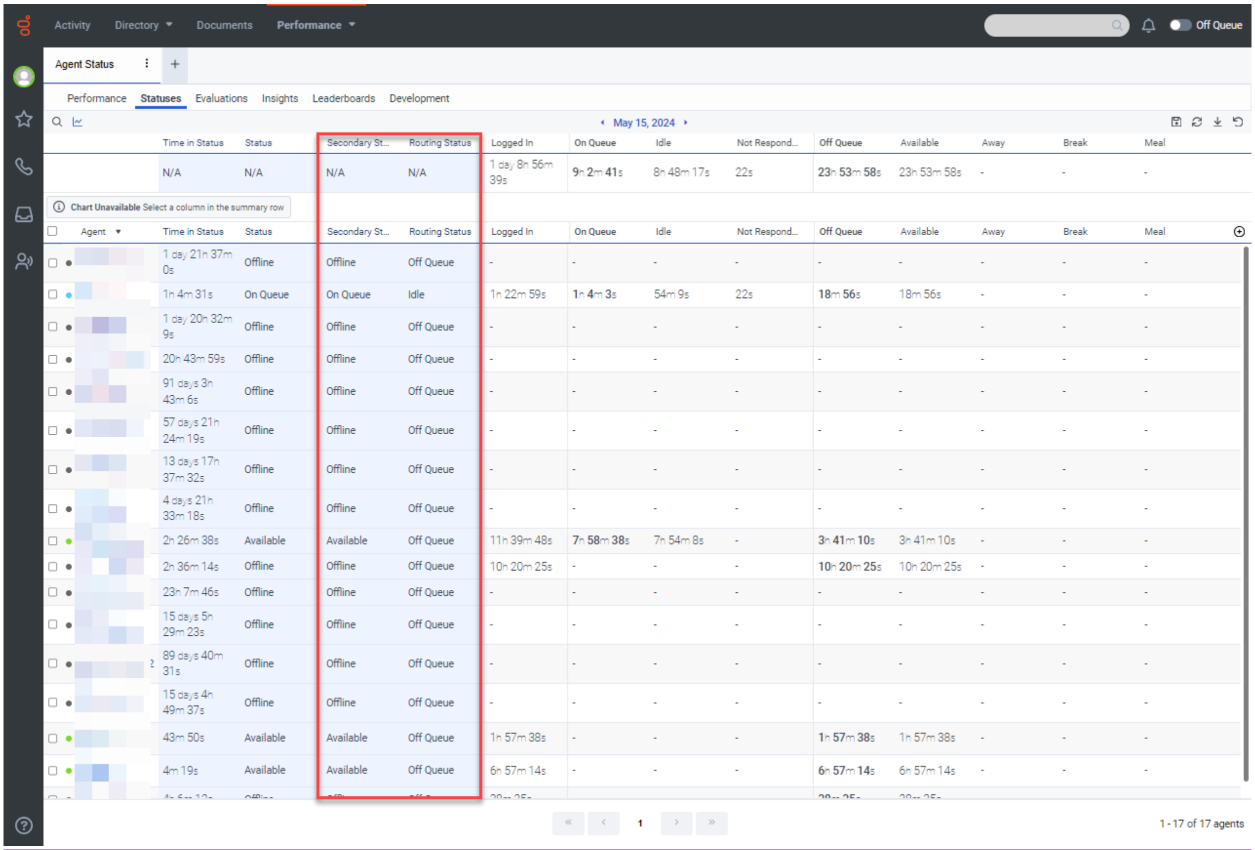
To add Secondary Status and Routing Status to the Agent Status View:

1. Click the plus button on the right side of the workspace.
2. Select Routing Status and Secondary Status.

3. Click Save.



The selected columns are added to the view.


Activity
Directory
Documents
Performance
Off Queue
Agent Status
Performance
Statuses
Evaluations
Insights
Leaderboards
Development
May 15, 2024
Time in Status
Status
Secondary St...
Routing Status
Logged In
On Queue
Idle
Not Respond...
Off Queue
Available
Away
Break
Meal
N/A
N/A
N/A
N/A
1 day 8h 56m 39s
9h 2m 41s
8h 48m 17s
22s
23h 53m 58s
23h 53m 58s
Chart Unavailable Select a column in the summary row
Agent
1 day 21h 37m 0s
Offline
Offline
Off Queue
1h 4m 31s
On Queue
On Queue
Idle
1h 22m 59s
1h 4m 3s
54m 9s
22s
18m 56s
18m 56s
1 day 20h 32m 9s
20h 43m 59s
91 days 3h 43m 6s
57 days 21h 24m 19s
13 days 17h 37m 32s
4 days 21h 33m 18s
2h 26m 38s
Available
Available
Off Queue
11h 39m 48s
7h 58m 38s
7h 54m 8s
3h 41m 10s
3h 41m 10s
2h 36m 14s
10h 20m 25s
10h 20m 25s
10h 20m 25s
23h 7m 46s
15 days 5h 29m 23s
89 days 40m 31s
15 days 4h 49m 37s
43m 50s
1h 57m 38s
1h 57m 38s
1h 57m 38s
4m 19s
6h 57m 14s
6h 57m 14s
6h 57m 14s
1 - 17 of 17 agents

6.1.7 Exporting or Scheduling a Report

6.1.7.1 Export a Report

6.1.7.2 Schedule a Report

(Video instructions available: Exporting Reports)

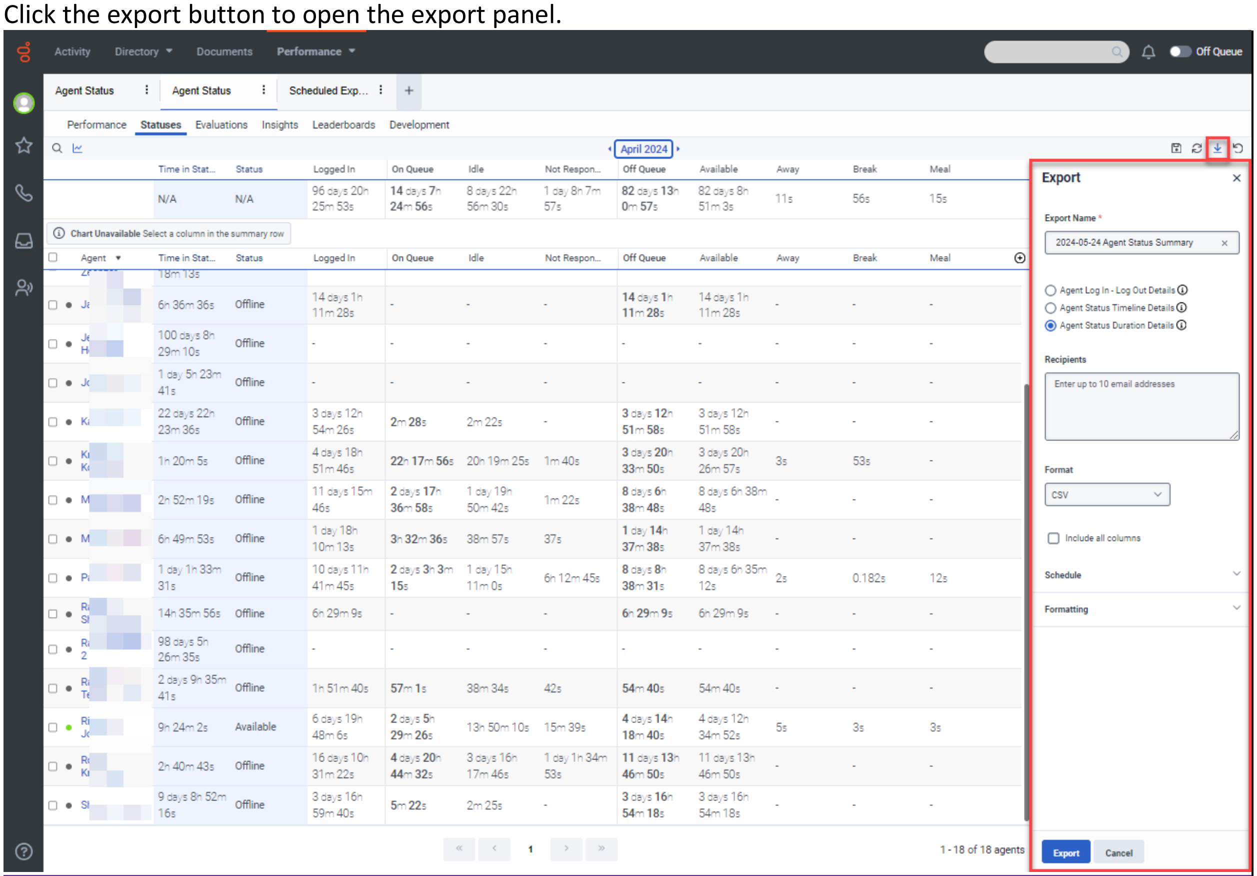
Supervisors can send reports to their Genesys inbox and any external email address as the immediate export of the current view or can schedule a single email or recurring future emails. Agent Performance, Agent Status, Queue Performance, and Interactions reports can be exported. Dashboards cannot be exported. By default, time values are displayed in milliseconds. ~~See Step 8,~~See SECTION 6.1.7.1 EXPORT A REPORT, STEP 8, below, for time formatting.

Select the help button in the bottom left corner of the window for help text specific to this view.

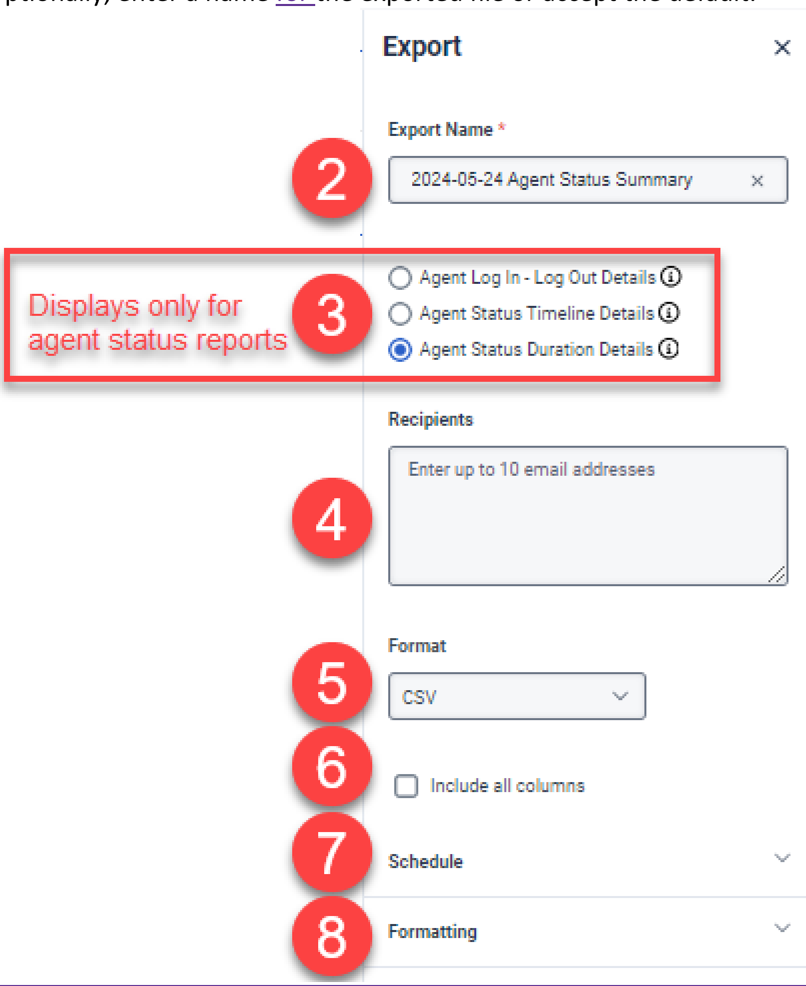
6.1.7.1 Export a Report

Complete the following steps to send a report to your Genesys inbox and optionally, to external email addresses.

1. Click the export button to open the export panel.

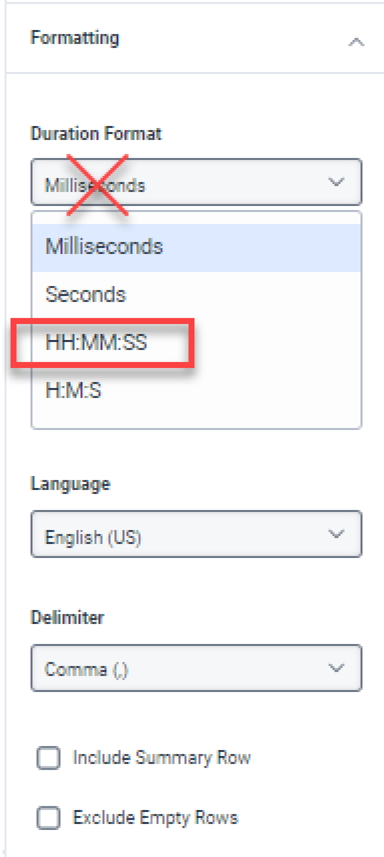


2. Optionally, enter a name for the exported file or accept the default.



3. For agent status reports only, choose the information to be included:
    1. Agent login and logout activity
    2. Details of agent status changes
    3. Agent time spent in each status
4. Optionally, enter ~~the email addresses of~~ up to 10 email addresses that ~~will~~ are to receive the report in addition to your Genesys inbox.
5. Select ~~whether~~ if the report ~~will~~ is to be a comma separated value (CSV) file that can be displayed in Excel or a PDF file.
6. Check the Include all columns box to include all columns that can be displayed in the view. Leave it unchecked to include only the currently displayed columns.
7. Schedule future delivery of reports. By default, the current view with current information is sent once. ~~See Schedule a Report~~See Schedule a Report to set up future one-time or recurring reports.

8. Select the time format as HH:MM:SS, otherwise time may be presented in milliseconds.

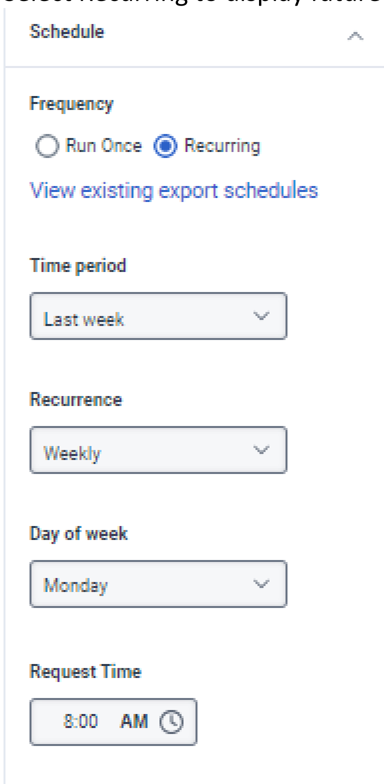


9. Click Export to send the report.

6.1.7.2 *Schedule a Report*

To schedule a single or recurring future report, complete steps 1-6 in ~~EXPORT A REPORT~~SECTION 6.1.7.1 EXPORT A REPORT, then click schedule to expand the menu. By default, the report is scheduled to be run one time when the Export is clicked.

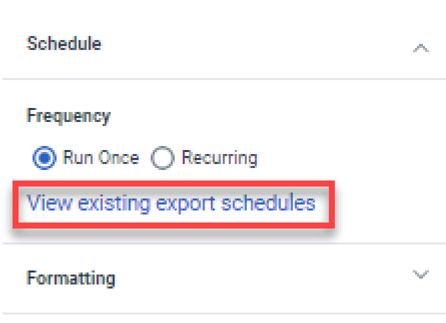
1. Select Recurring to display future scheduling options.



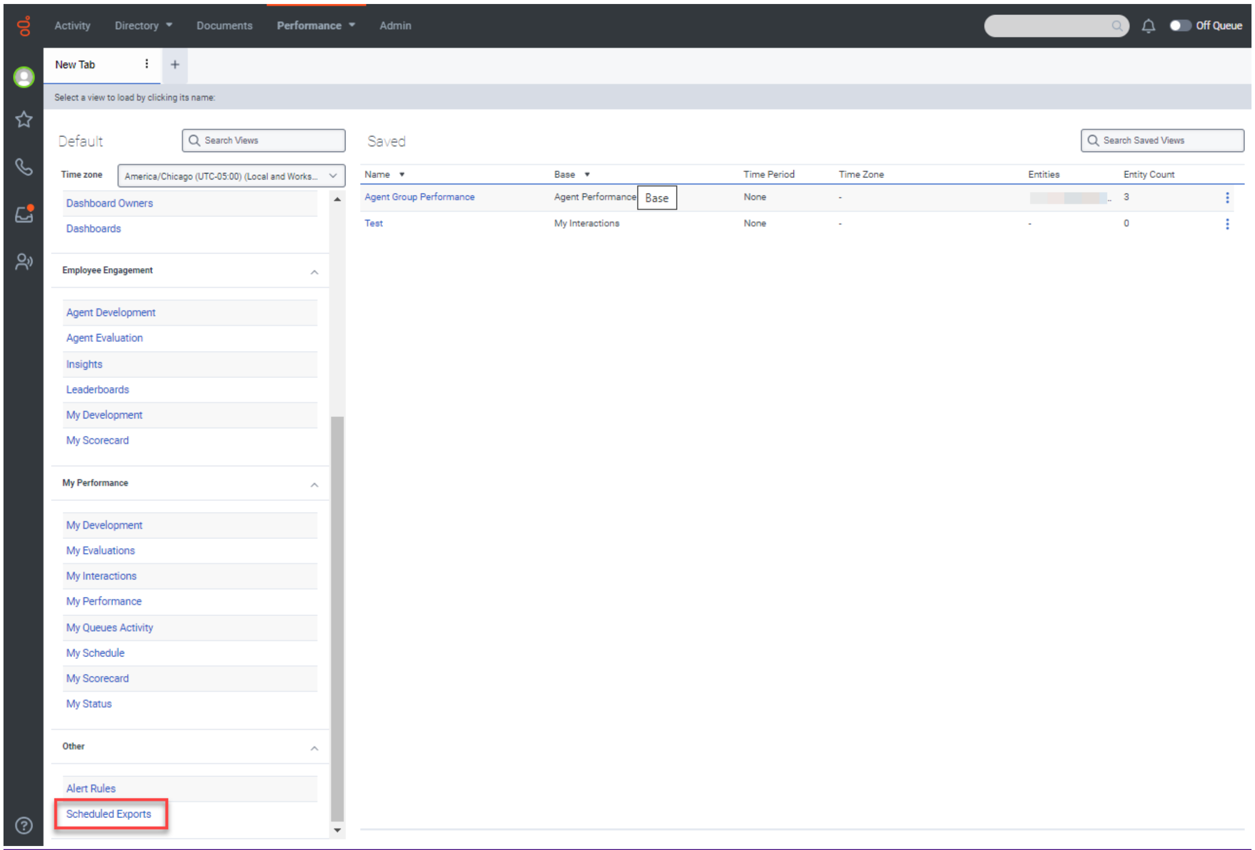
2. Select the time period of the displayed view to be sent. The selected time is relative to the day the report is sent. For example, recurring weekly reports of "Past 7 days" ~~will include~~includes the seven days prior to the delivery date.
3. Select the recurrence to specify how often future reports ~~will~~ are to be sent.
4. Select the day of the week for report delivery.
5. Select the time of day for report delivery.
6. Set the time format as shown in ~~Step 8, above.~~SECTION 6.1.7.1 EXPORT A REPORT, STEP 8.
7. Click Export to start the schedule.

Note that you can open the Scheduled Exports view to enable/disable, run, edit, or delete existing schedules by clicking View existing export schedules in the Export pane or by opening a new tab and selecting the Scheduled Exports.

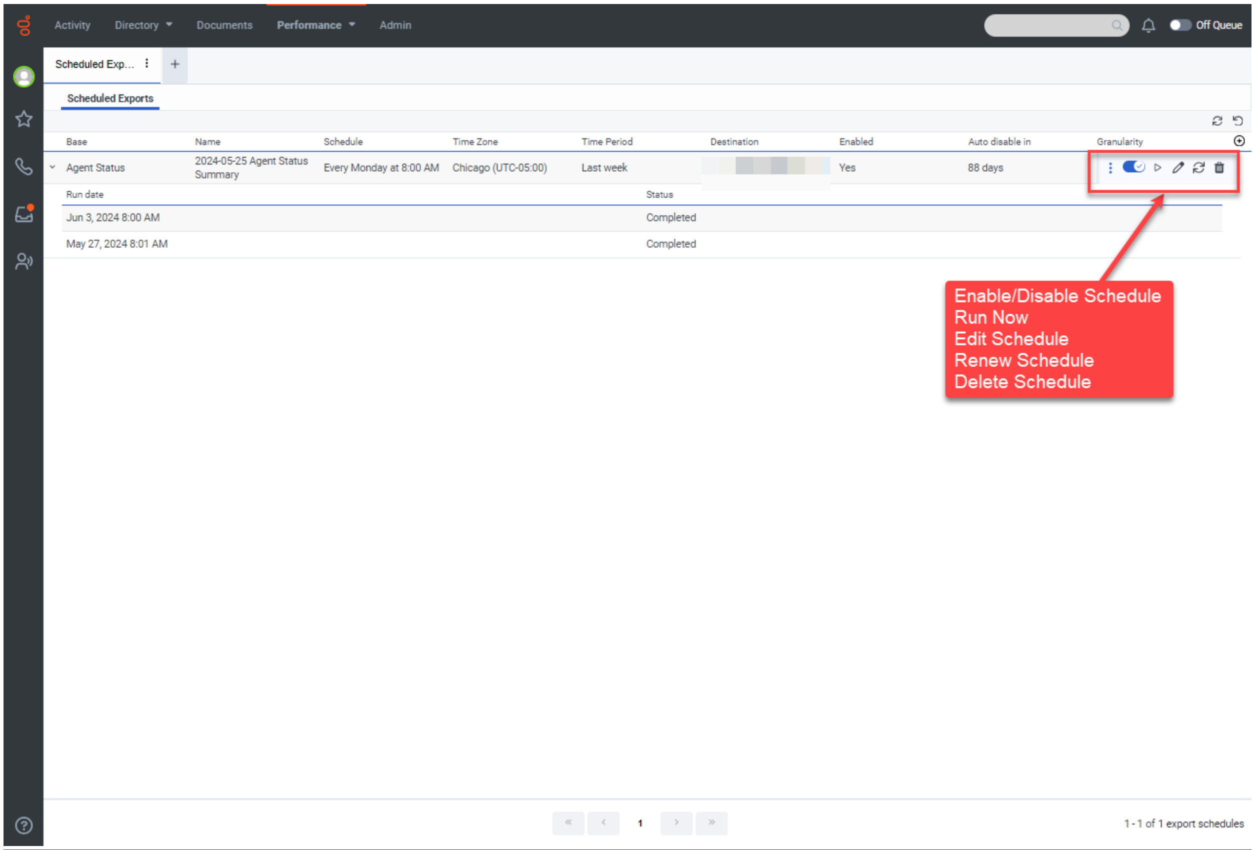
Opening export schedules from the Export pane:



Opening export schedules from a new tab:



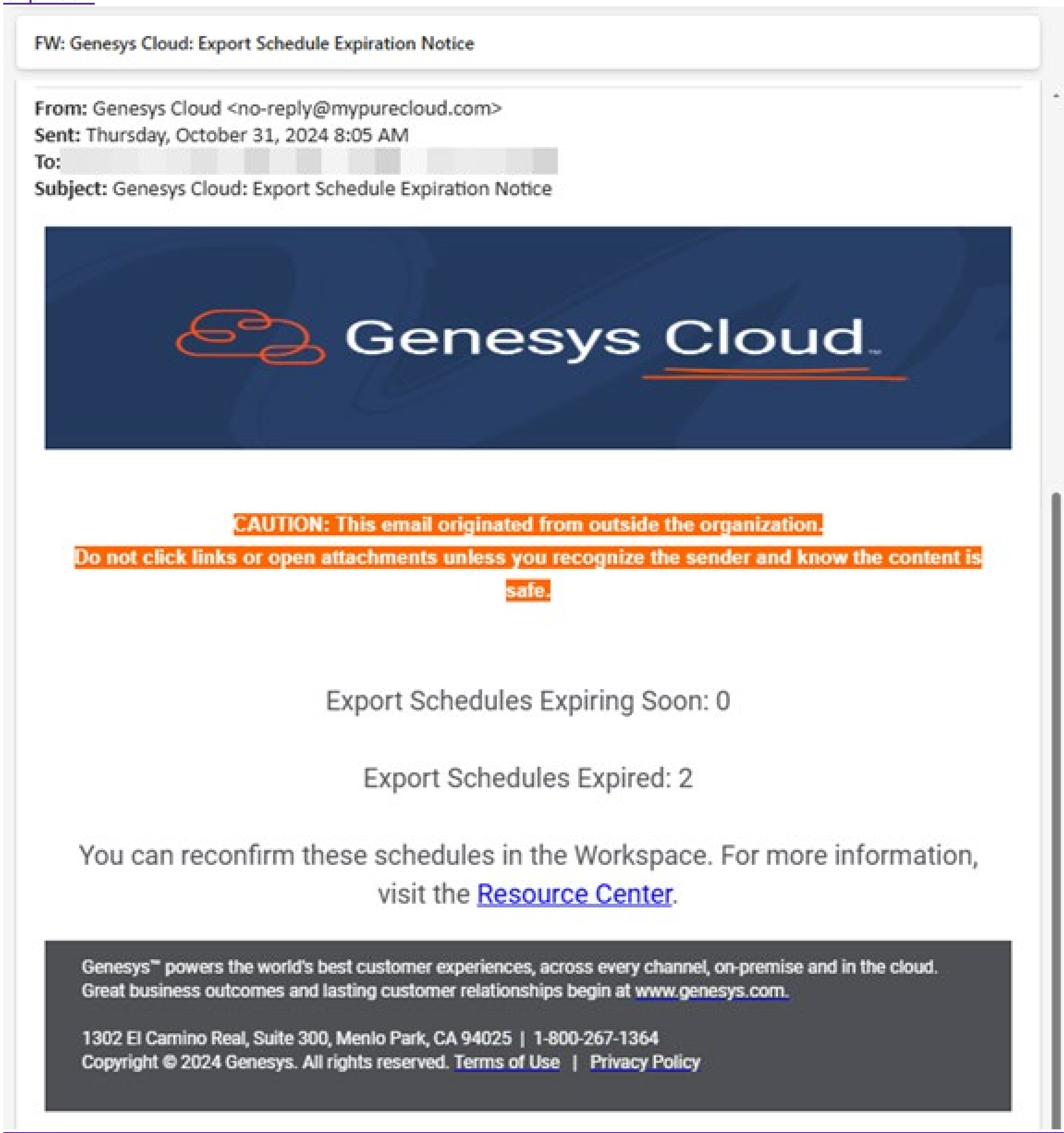
Scheduled Exports showing completed exports sent to supervisor and schedule controls.


Activity
Directory
Documents
Performance
Admin
Off Queue
Scheduled Exp...
Scheduled Exports
Base
Name
Schedule
Time Zone
Time Period
Destination
Enabled
Auto disable in
Granularity
Agent Status
2024-05-25 Agent Status Summary
Every Monday at 8:00 AM
Chicago (UTC-05:00)
Last week
Yes
88 days
Run date
Status
Jun 3, 2024 8:00 AM
Completed
May 27, 2024 8:01 AM
Completed
Enable/Disable Schedule
Run Now
Edit Schedule
Renew Schedule
Delete Schedule
1 - 1 of 1 export schedules

6.1.8 Expiring Reports

6.1.8.1 Renewing Reports

Scheduled reports expire after 100 days. The user receives an email letting them know when a report is expiring and when the report has expired.


FW: Genesys Cloud: Export Schedule Expiration Notice

From: Genesys Cloud <no-reply@mypurecloud.com>
Sent: Thursday, October 31, 2024 8:05 AM
To: [redacted]
Subject: Genesys Cloud: Export Schedule Expiration Notice

Genesys Cloud

CAUTION: This email originated from outside the organization.
Do not click links or open attachments unless you recognize the sender and know the content is safe.

Export Schedules Expiring Soon: 0

Export Schedules Expired: 2

You can reconfirm these schedules in the Workspace. For more information, visit the Resource Center.

Genesys™ powers the world's best customer experiences, across every channel, on-premise and in the cloud. Great business outcomes and lasting customer relationships begin at www.genesys.com.

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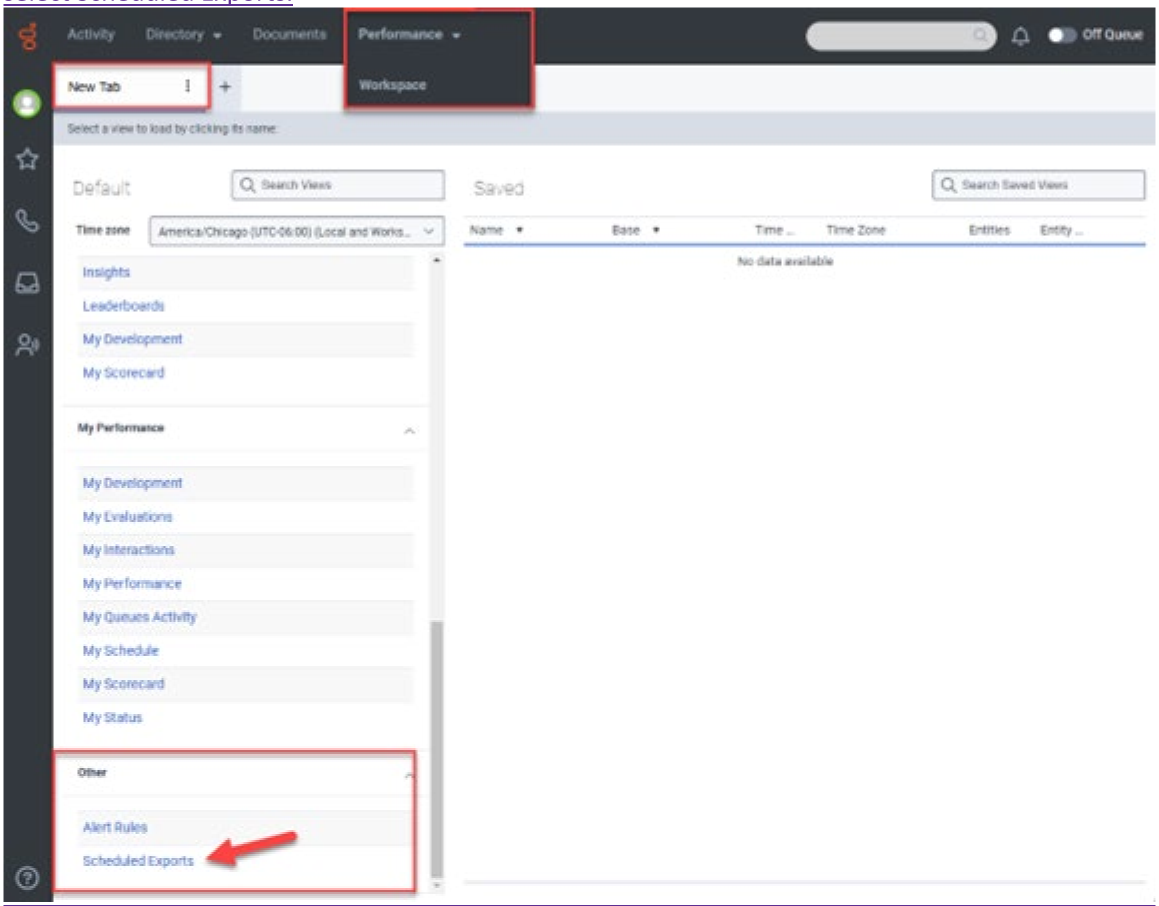
6.1.8.1 Renewing Reports

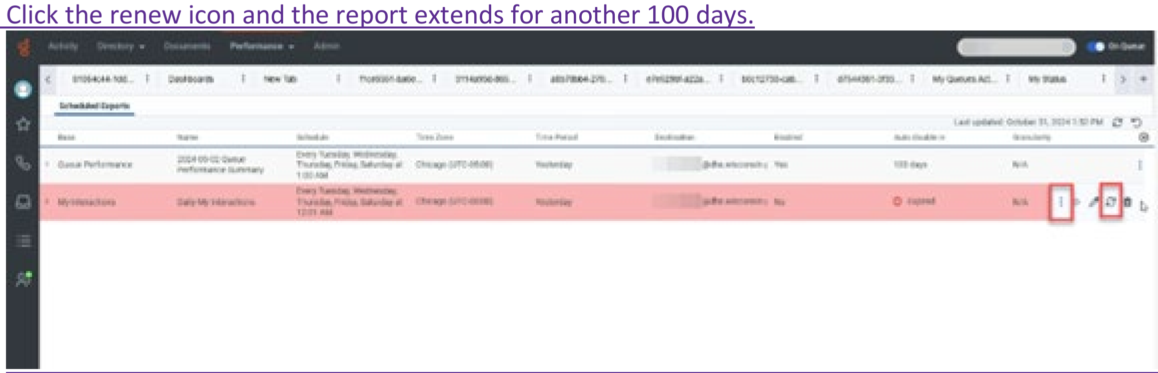
(Video instructions available: Renewing Reports)

To renew expiring or expired reports:

1. From the Performance>Workspace>New Tab screen, scroll down to the section titled Other and select Scheduled Exports.



2. From the Scheduled Exports screen, you can see which reports are expired and scheduled to expire.
3. Click the three dots on the right of the report you want to renew.
4. Click the renew icon and the report extends for another 100 days.



Note

The three dot menu options include: Enable/disable schedule, Run now, Edit schedule, Renew schedule, and Delete schedule.

7 Local Administrator

7.2 Setting Business Events - Meetings

(Video instructions available: Setting Business Events - Meetings)

Local administrators can schedule future meeting business events for a line of business to inform callers when the office is closed due to meetings. Callers hear the message in their selected language of English, Spanish, or Hmong. Callers who select other as their language will hear the prompt in English. While the meeting business event is activated, Genesys ends a call after the message plays for the caller. Callers are not sent to a queue. Meeting business events apply to the local admin's call center. Do not set holiday schedules using a meeting business event (for more information, see section 7.4 Setting Holidays).

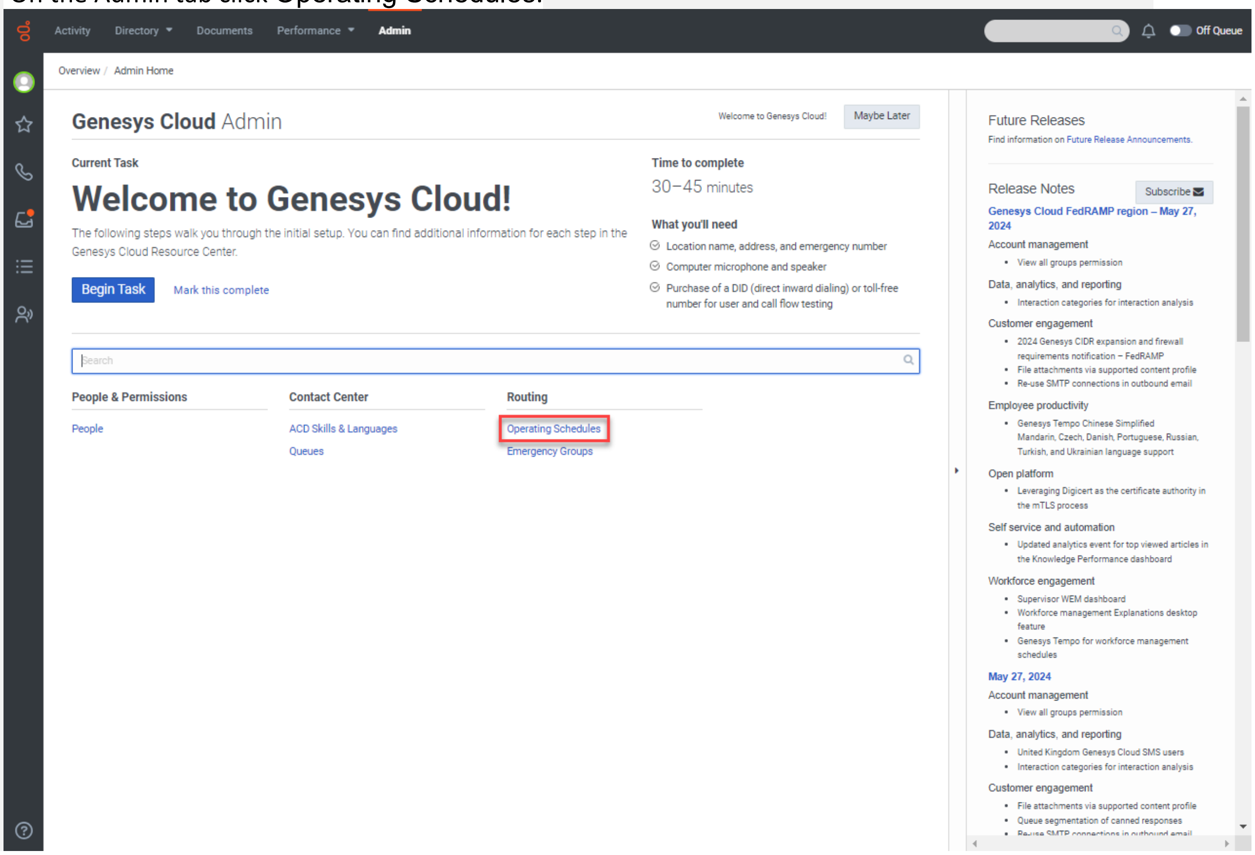
~~Scheduling a Meeting Business Event~~

7.2.1 Scheduling a Meeting Business Event

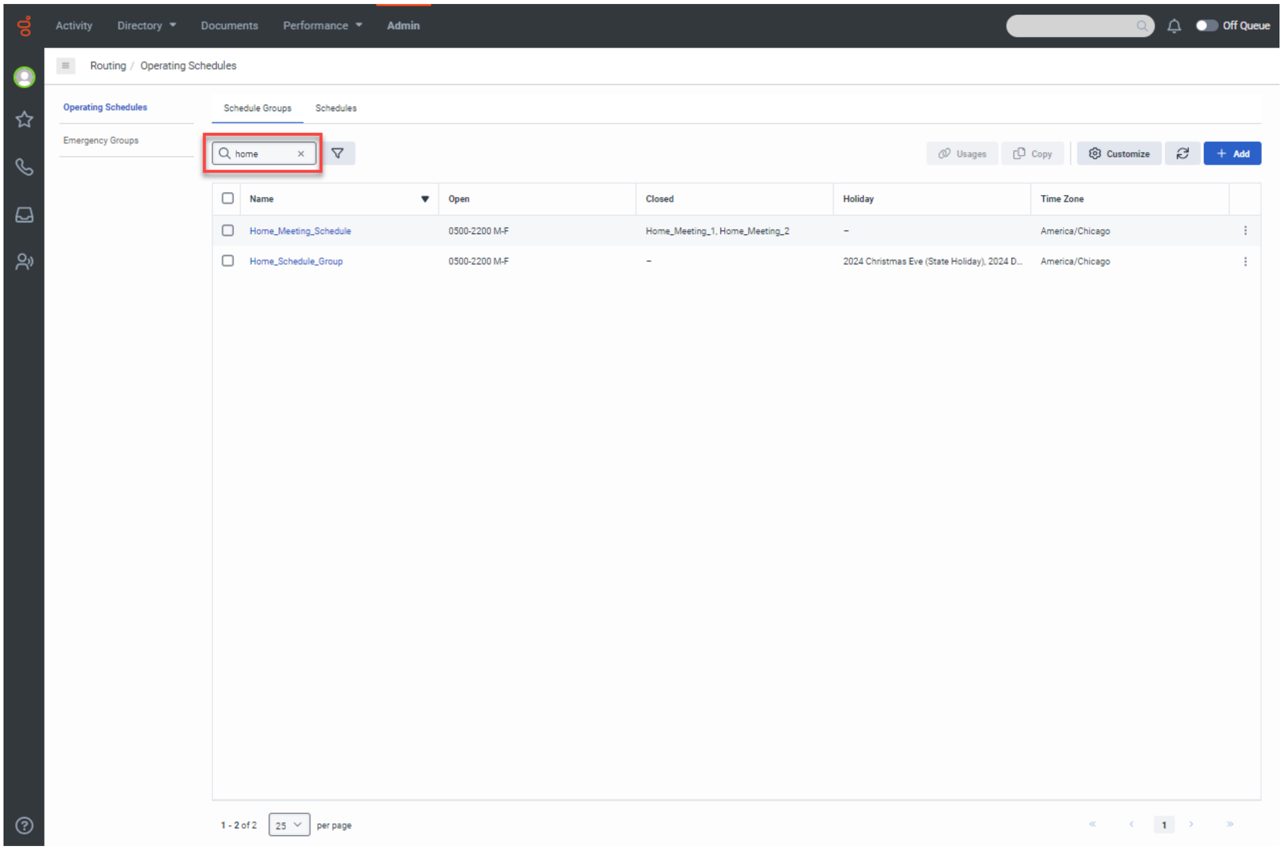
To activate a meeting business event:

Note	Prior to scheduling a business meeting event, email the inbox: dhsgenesyscloudproject@dhs.wisconsin.gov, to confirm which prompt is currently loaded (do not open a ticket) Do not open a Genesys Support ticket unless a new prompt is required.

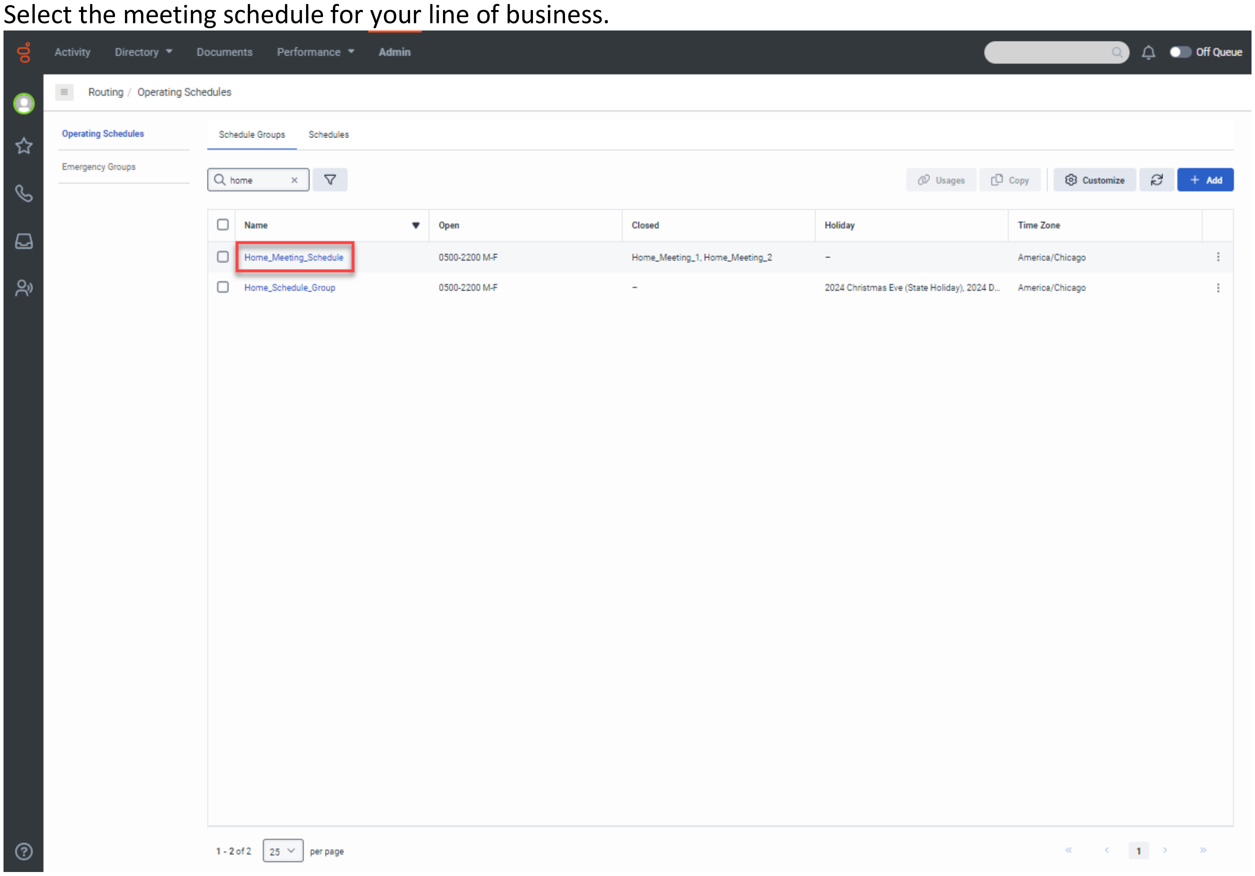
1. On the Admin tab click Operating Schedules.



2. If necessary, enter your line of business in the Search by name box to filter by the desired line of business.

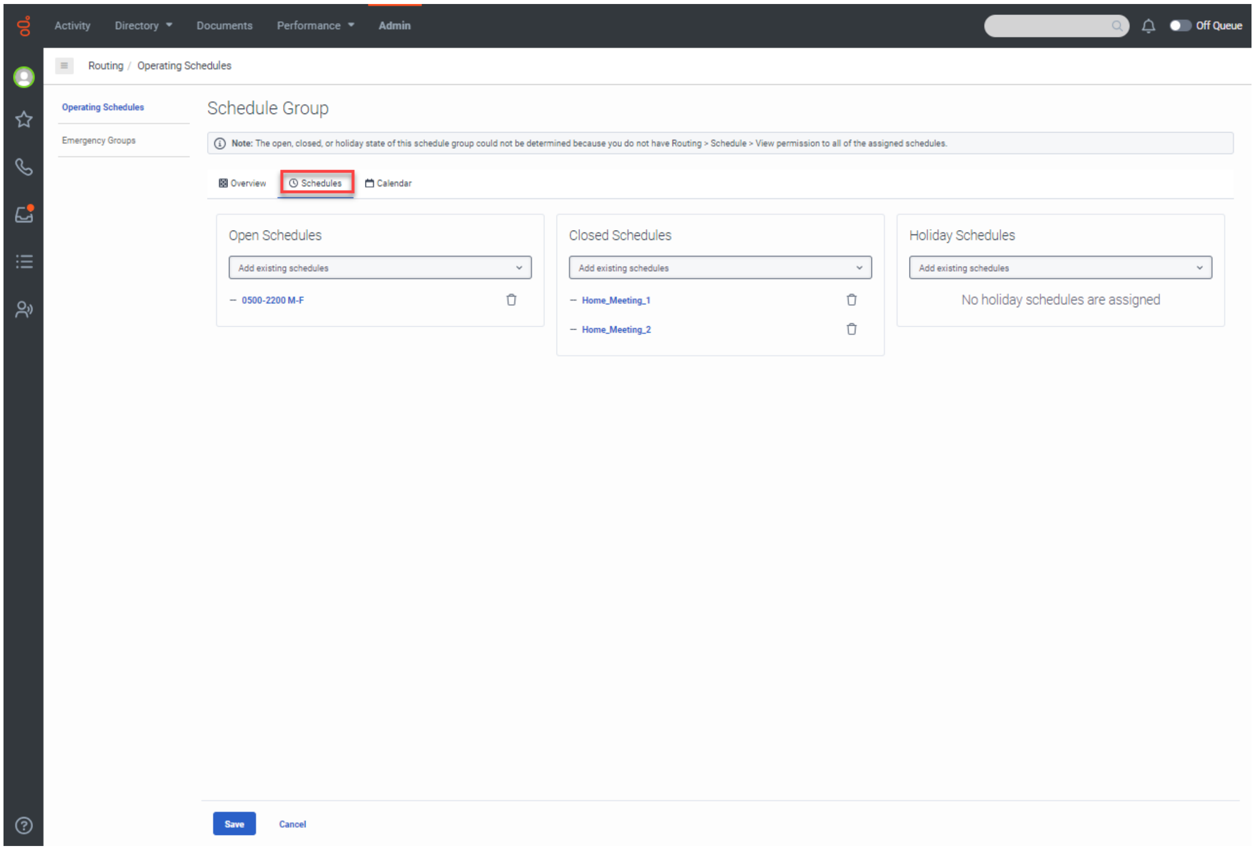


3. Select the meeting schedule for your line of business.



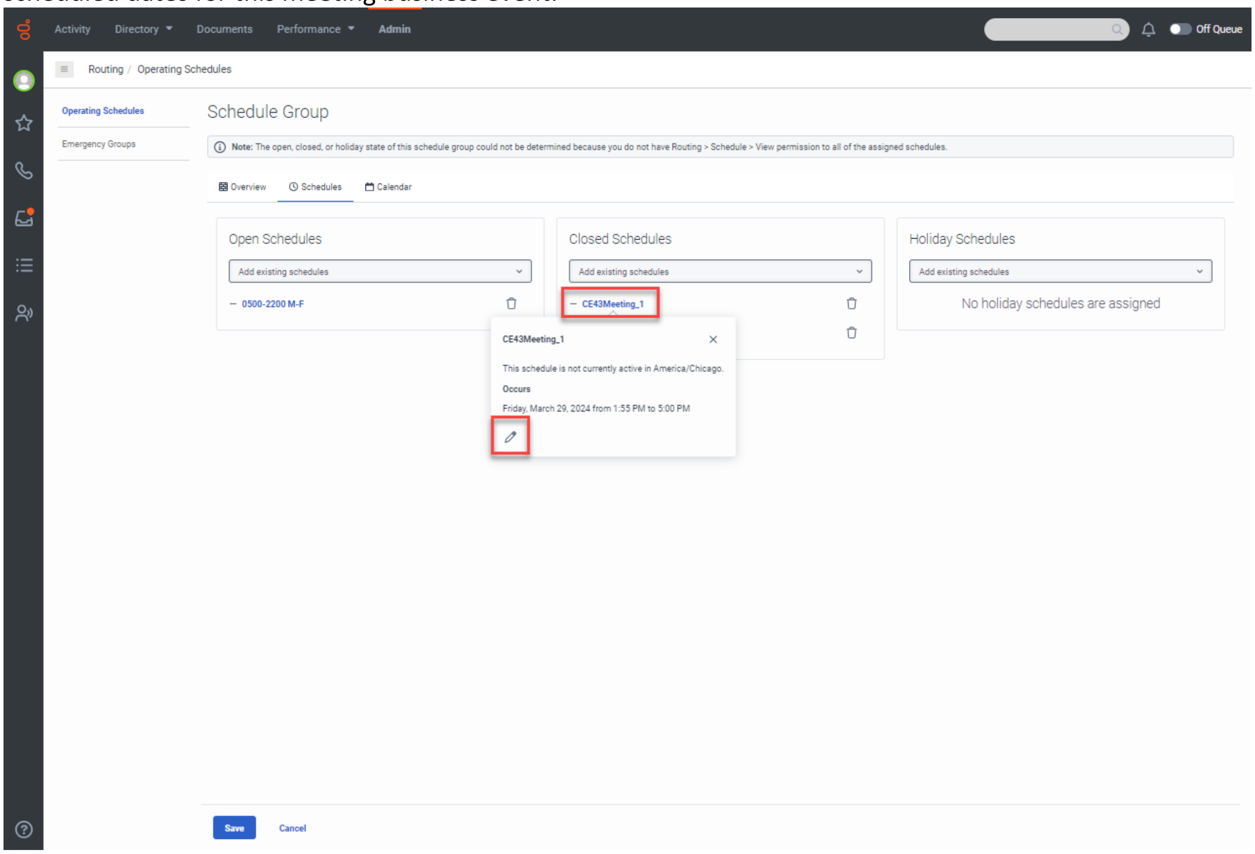
4. On the Schedule Group page, click **Schedules**. The Schedule Group page displays the Closed Schedules. These are used for meeting business events that close the office.

Note	Do not use a meeting schedule for holidays. For more information, see section 7.4 Setting Holidays.

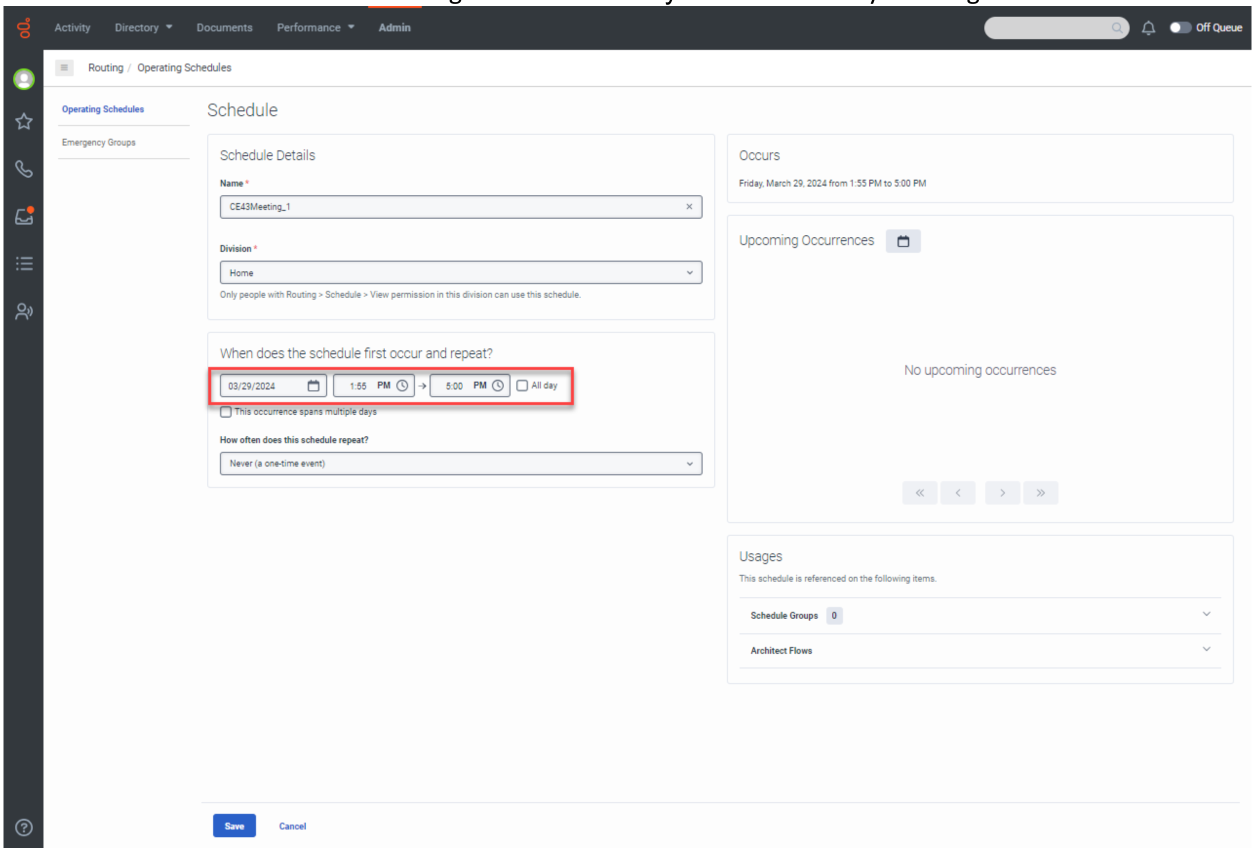


5. If no business meeting is listed, click the drop-down menu and select *your line of business*_Meeting_1 and *your line of business*_Meeting_2 for your line of business.

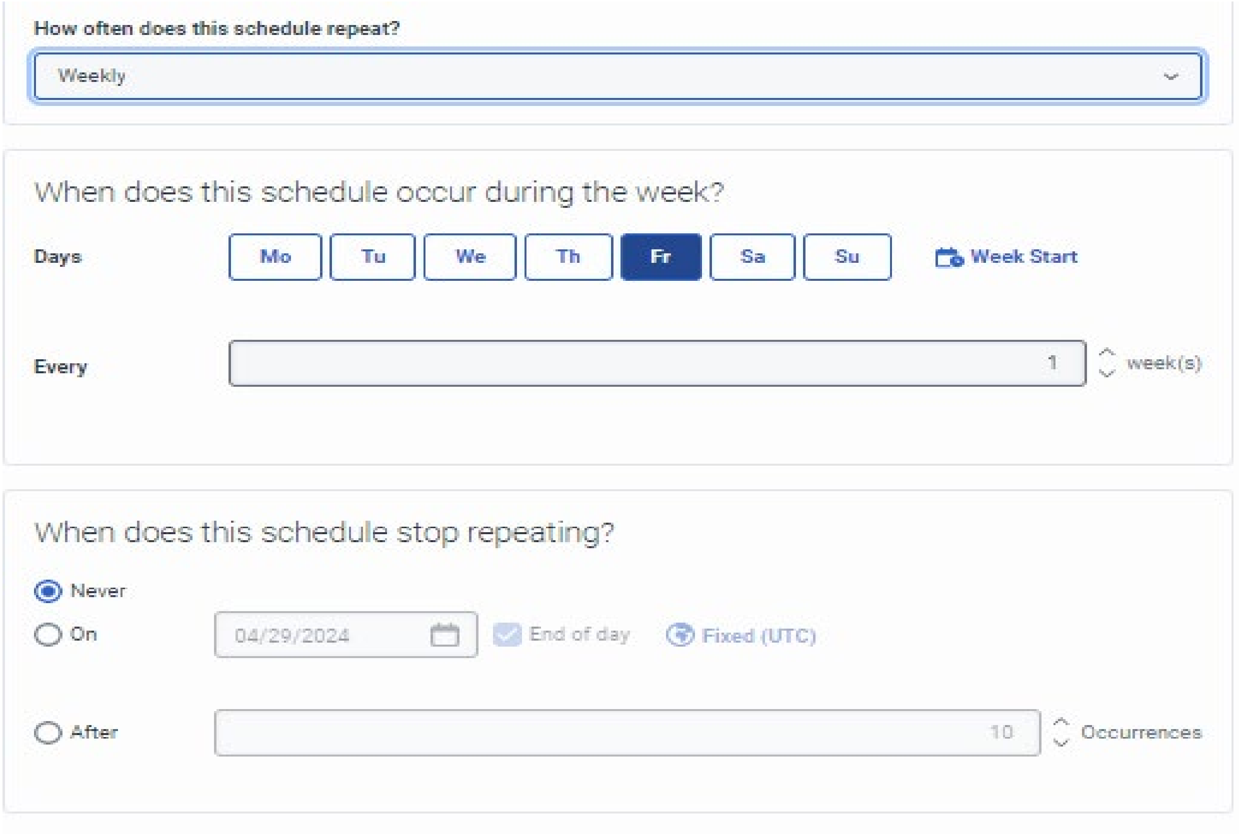
6. Select Meeting_1 or Meeting_2 for your line of business and click the pencil button to edit the scheduled dates for this meeting business event.



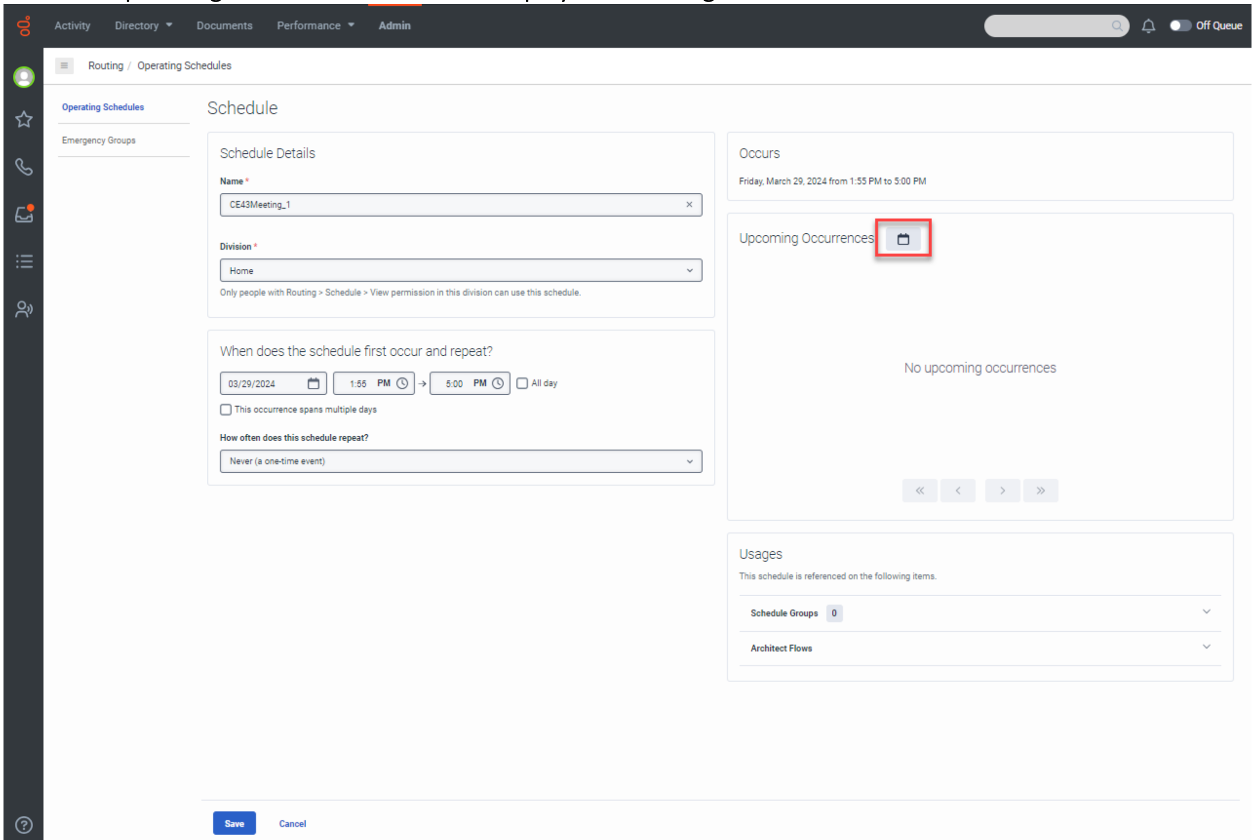
7. Enter the date and hours of the meeting. Check the All day box for an all day meeting.

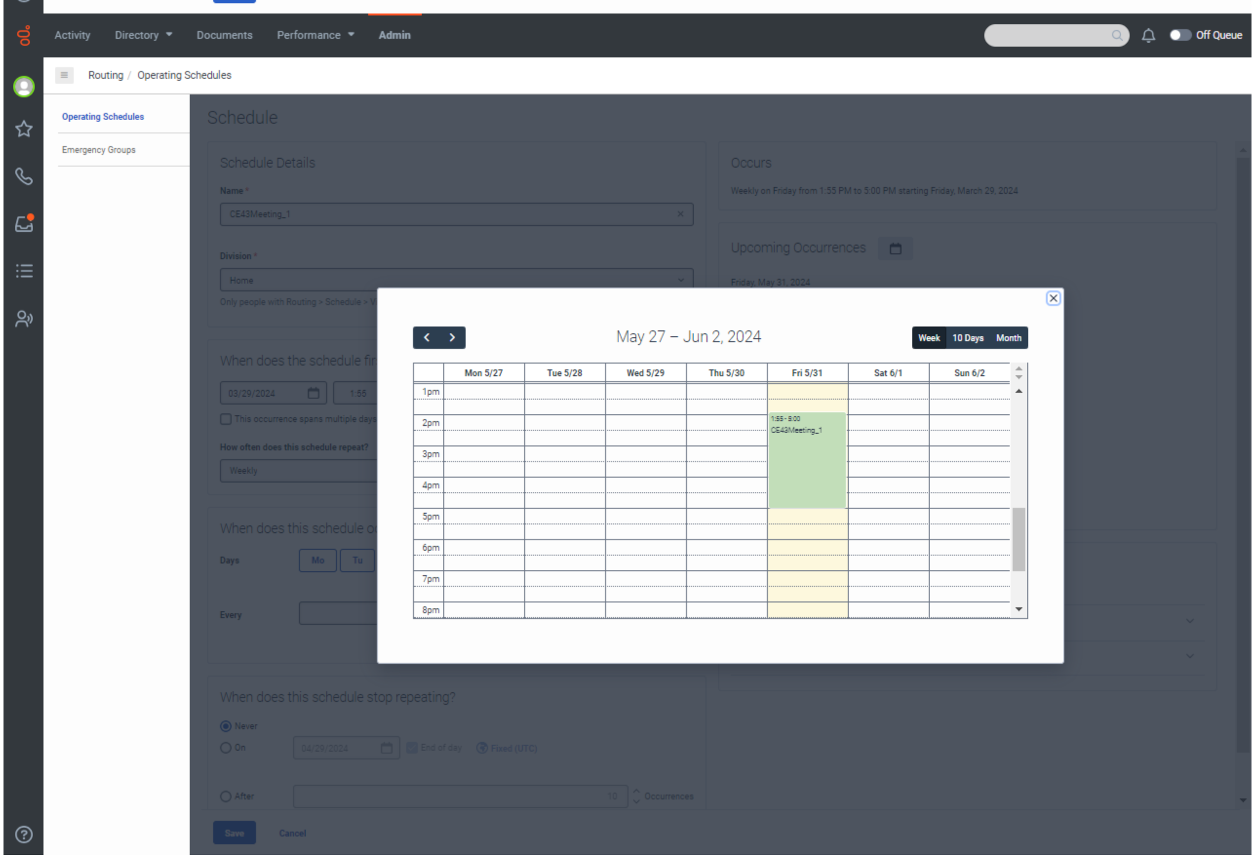


8. Optionally, select a repeating schedule for the meeting from the How often does this schedule repeat? drop-down menu. The scheduling details vary with the drop-down menu selection.



9. Click the Upcoming Occurrences button to display the meeting as a calendar event.





10. Click Save.

After scheduling a meeting event, you can click on the event to display its schedule.

7.2.2 Creating Multiple Meeting Business Event Schedules

There are two meeting business event closed schedules, Meeting1 and Meeting2 that can be used to schedule closures. Each can be used to set a single one-time closure or single recurring closure. Since no more than two one-time closures or recurring closures can be scheduled at a time, Meeting1 and Meeting2 must be rescheduled as closures pass.

7.2.3 Cancelling a Business Event Schedule

To cancel a scheduled meeting business event:

1. On the Admin tab, click Operating Schedules.
2. Select the scheduled business meeting event.
3. On the Schedule Group page, click Schedules.
4. Click a trash can button to cancel the associated schedule.

Note	The meeting business event can be rescheduled, SEE SCHEDULING A MEETING BUSINESS EVENT

7.5 Agent Accounts

7.5.1 Requesting Access for a New Agent

Access to Genesys Cloud CX for new agents are created by the Genesys Cloud Support team.

To request access for a new agent:

1. Complete the Genesys Cloud CX Provisioning Sheet.

Note	To request a copy of the Genesys Cloud CS Provisioning Sheet email dhsgenesyscloudproject@dhs.wisconsin.gov.

2. The supervisor or local administrator emails the completed document to: helpdesk@wi.gov. For instructions on opening a ticket see Section 11.1.2 opening a ticket.

After the agent has been added the agent receives a Welcome to Genesys Cloud email informing them their access has been granted.

~~7.5~~7.6 Assigning Queues

7.6.1 Assign or Unassign a User From a Queue

(Video instructions available: Assigning Queues)

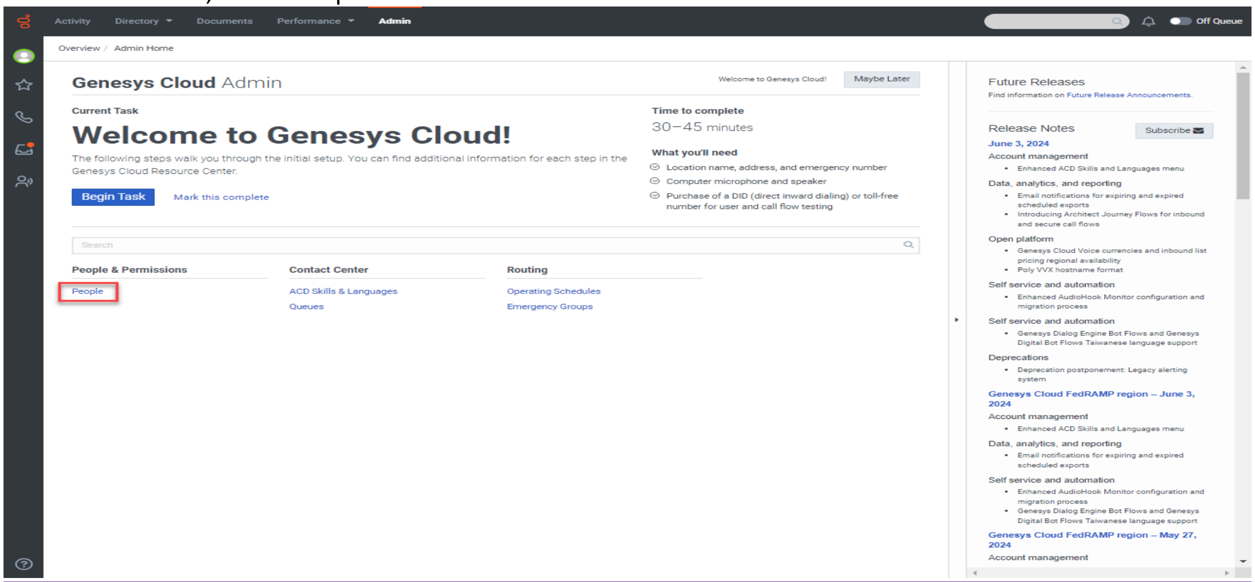
Note	Agents must be assigned their spoken language(s) using the steps in section ~~7.5 ASSIGNING LANGUAGES~~ 7.7 ASSIGNING LANGUAGES before they can be assigned to a queue or queues.

Agents are assigned to various queues based on specific skills and spoken languages. Local administrators can assign and unassign workers. Agents can be assigned skills for multiple languages.

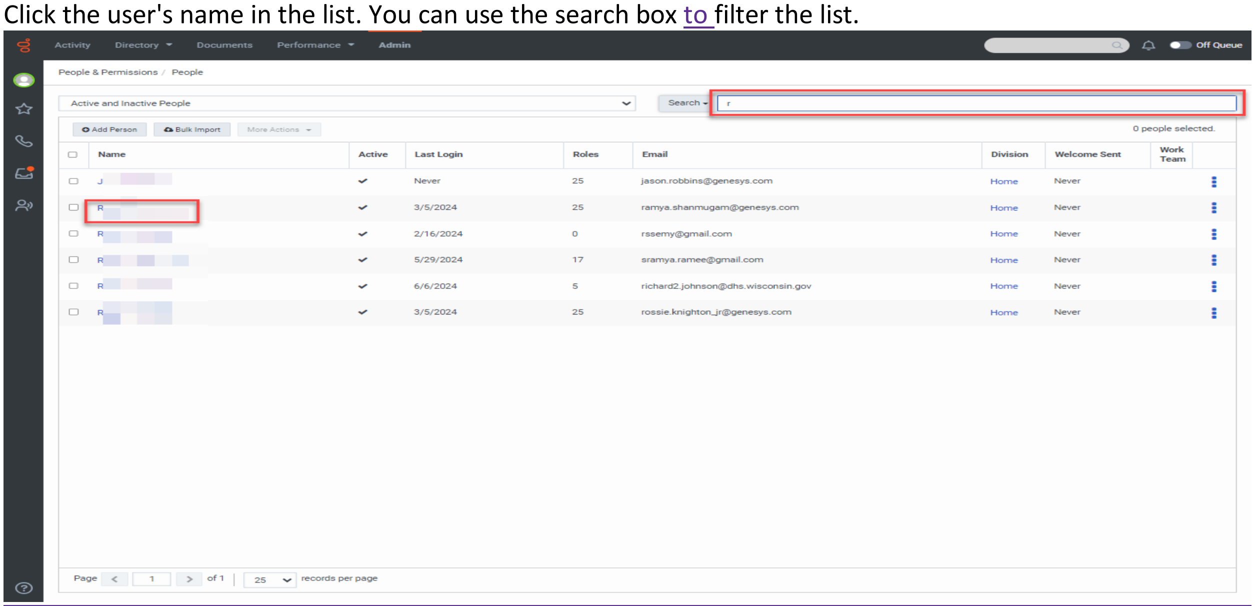
7.6.1 Assign or Unassign a User- from- a Queue

To assign a user to a Queue:

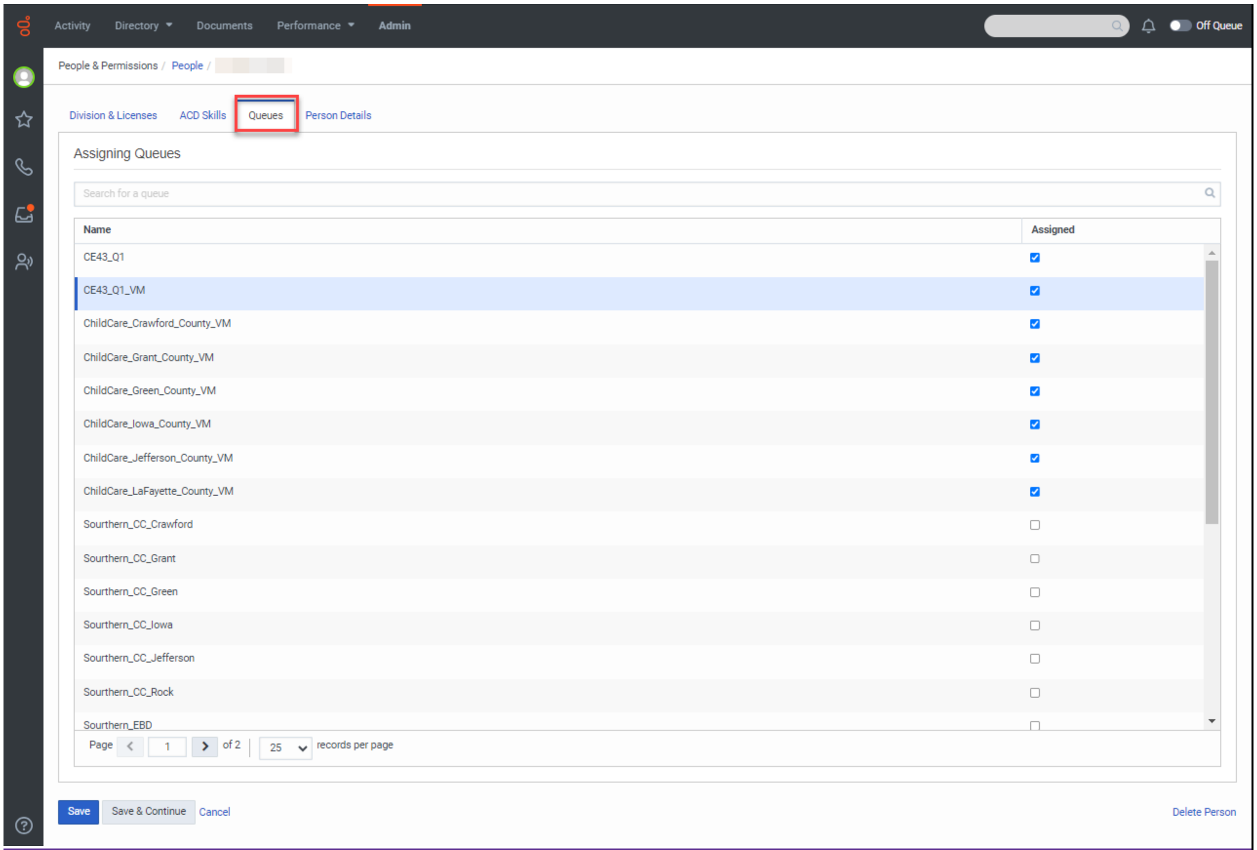
1. On the Admin tab, select People.



2. Click the user's name in the list. You can use the search box to filter the list.

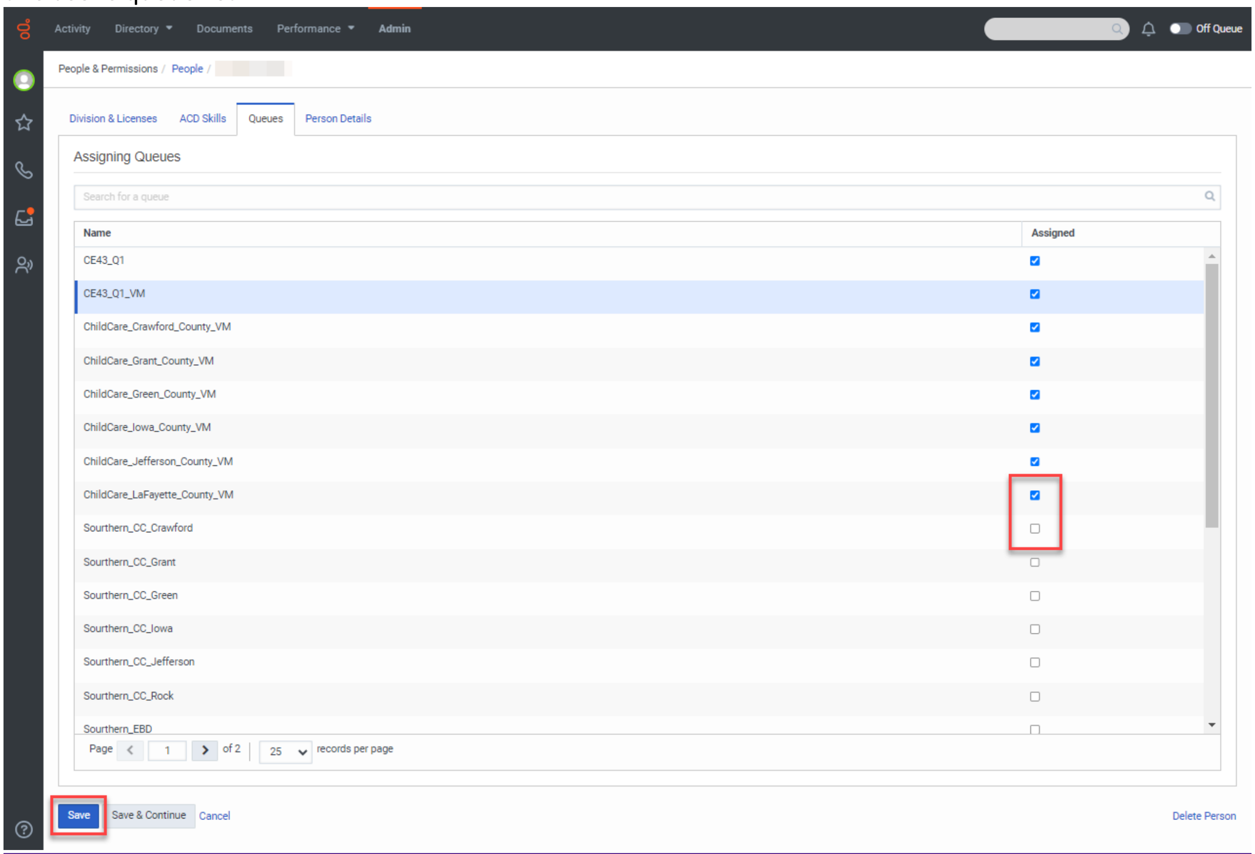


3. Select the Queues tab.



4. Select or deselect a box to add or remove the user from that queue and click Save to apply your changes and return to the list of users or click Save & Continue to apply your changes and remain on

this user's queue list.



7.~~6~~7 Assigning Languages

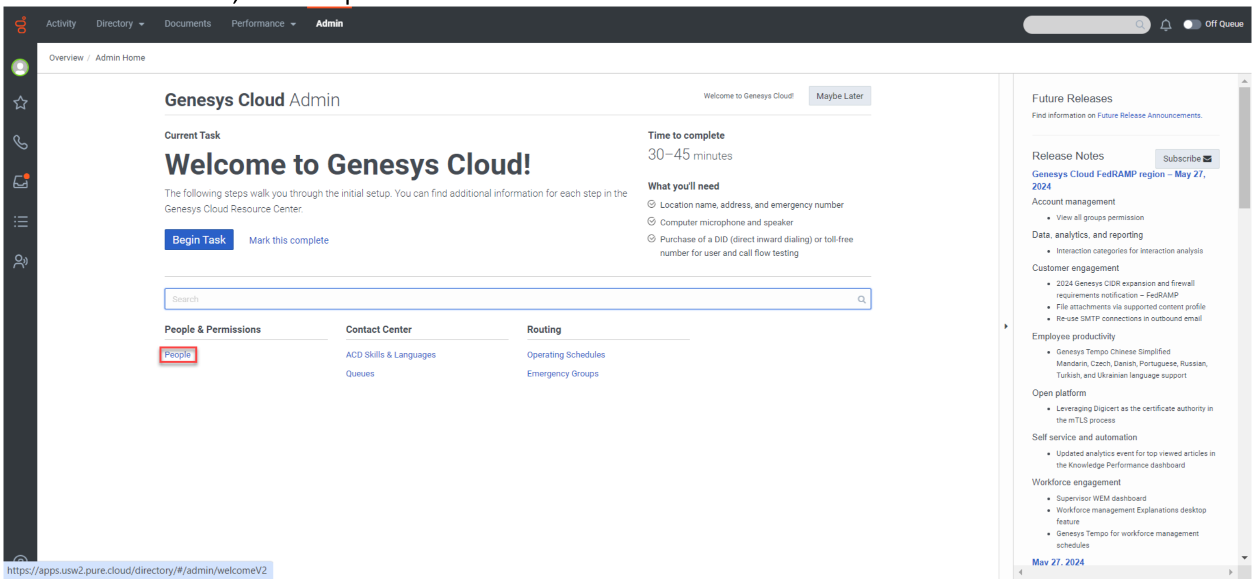
(Video instructions available: Assigning Languages)

Agents are assigned to various queues based on specific skills and spoken languages. Local administrators can assign and reassign workers. Agents can be assigned skills for multiple languages.

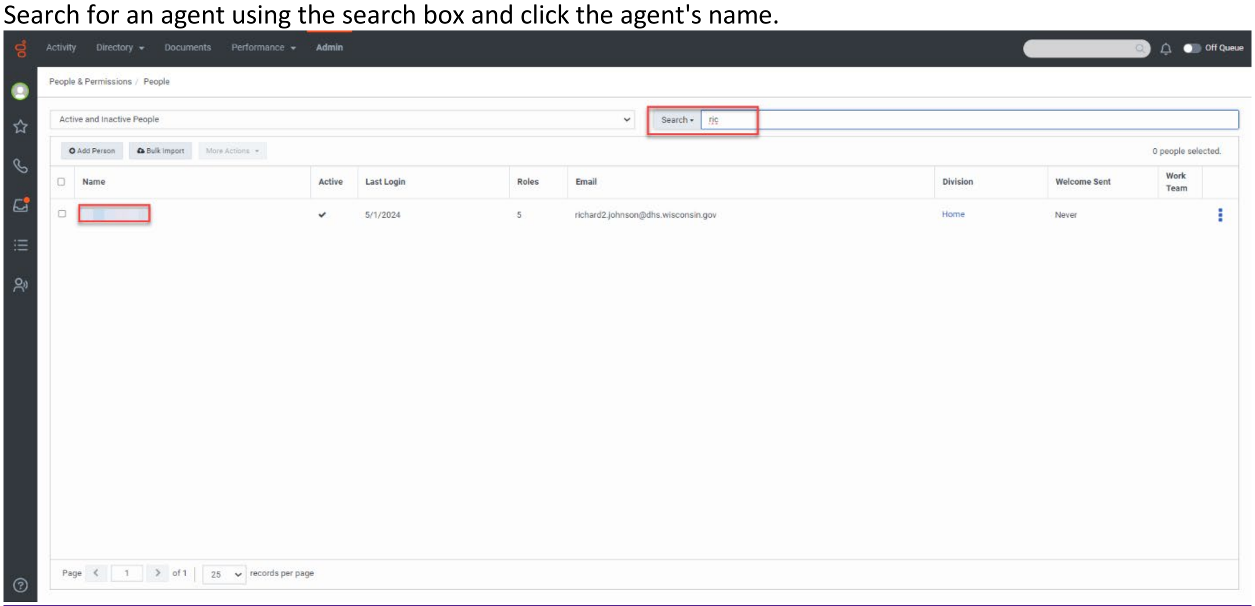
7.7.1 Assign Agent Skills - English

To assign an agent as an English speaker:

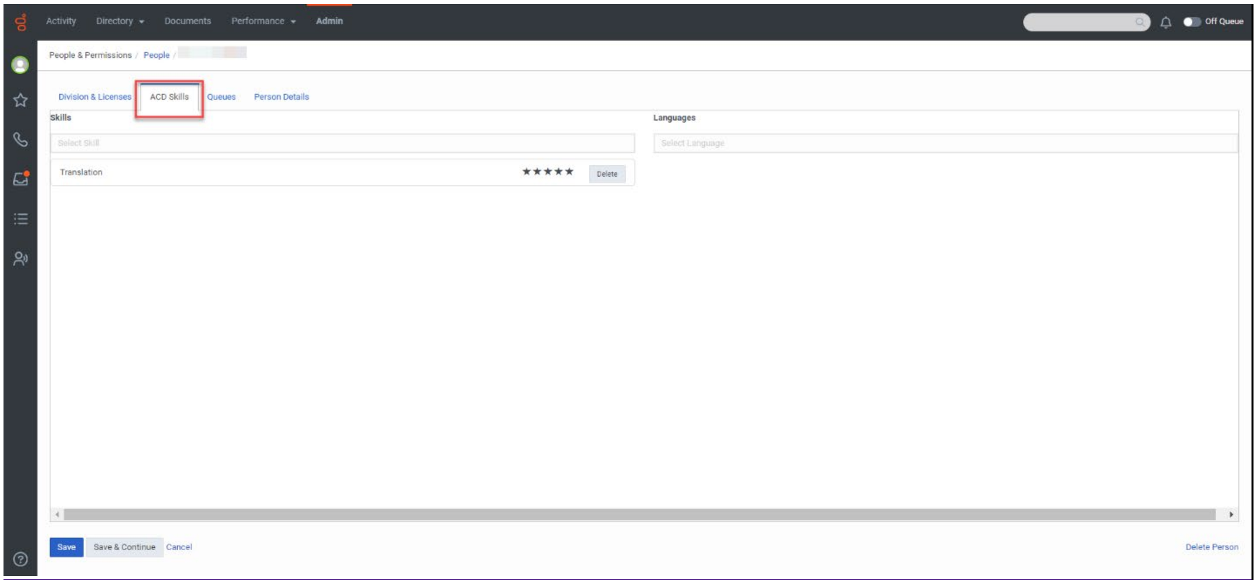
1. From the Admin tab, click People.



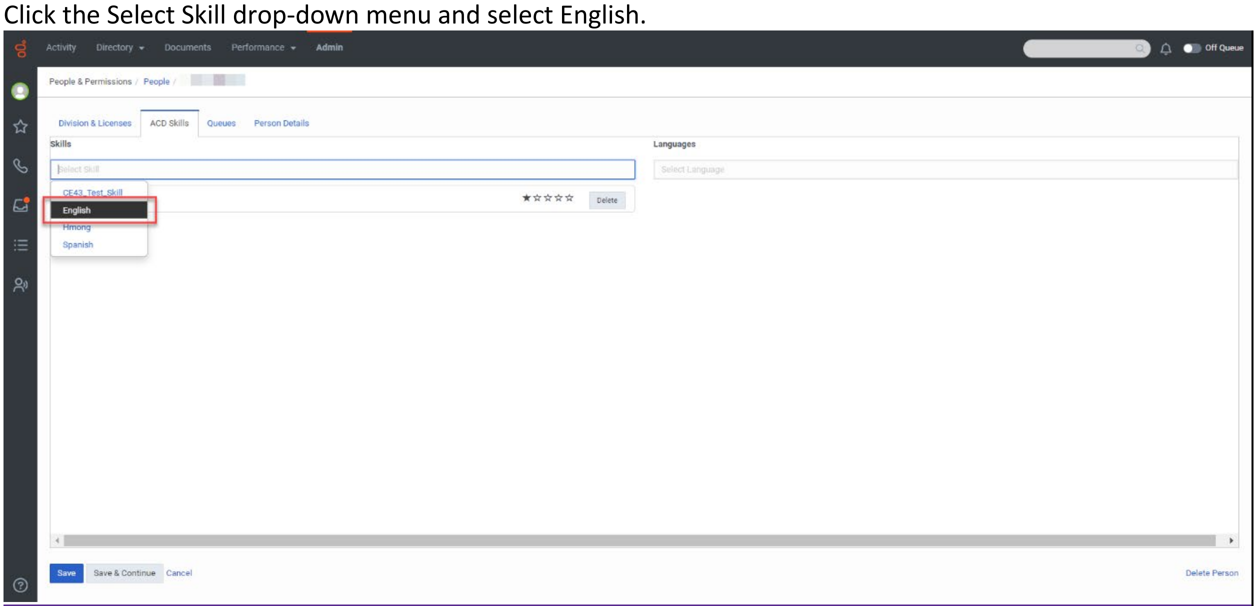
2. Search for an agent using the search box and click the agent's name.



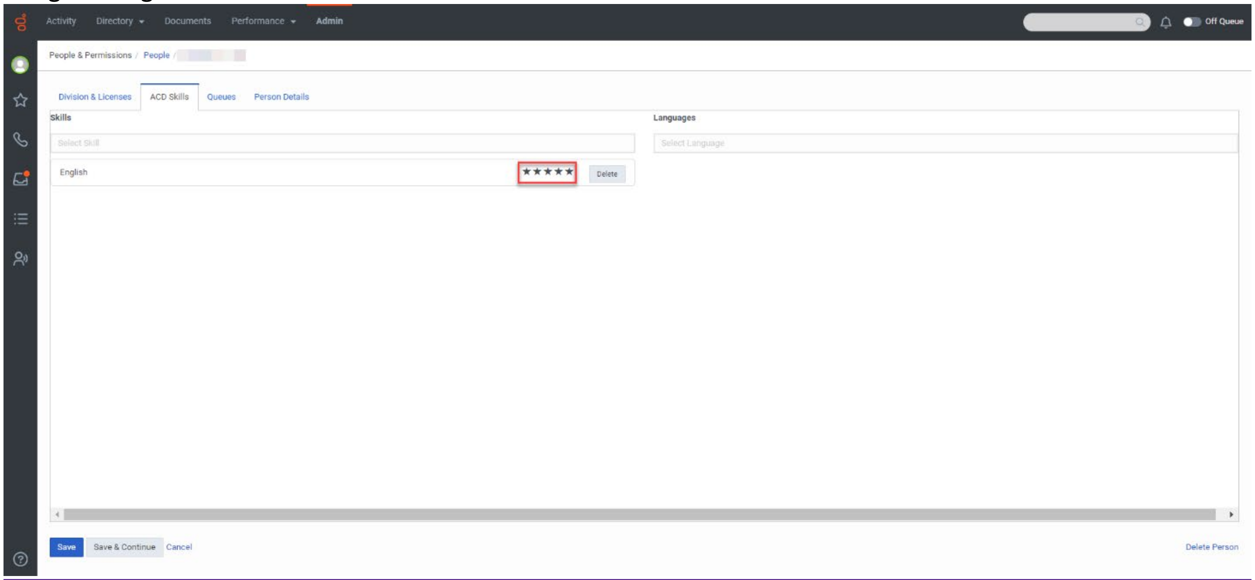
3. Select ACD Skills.



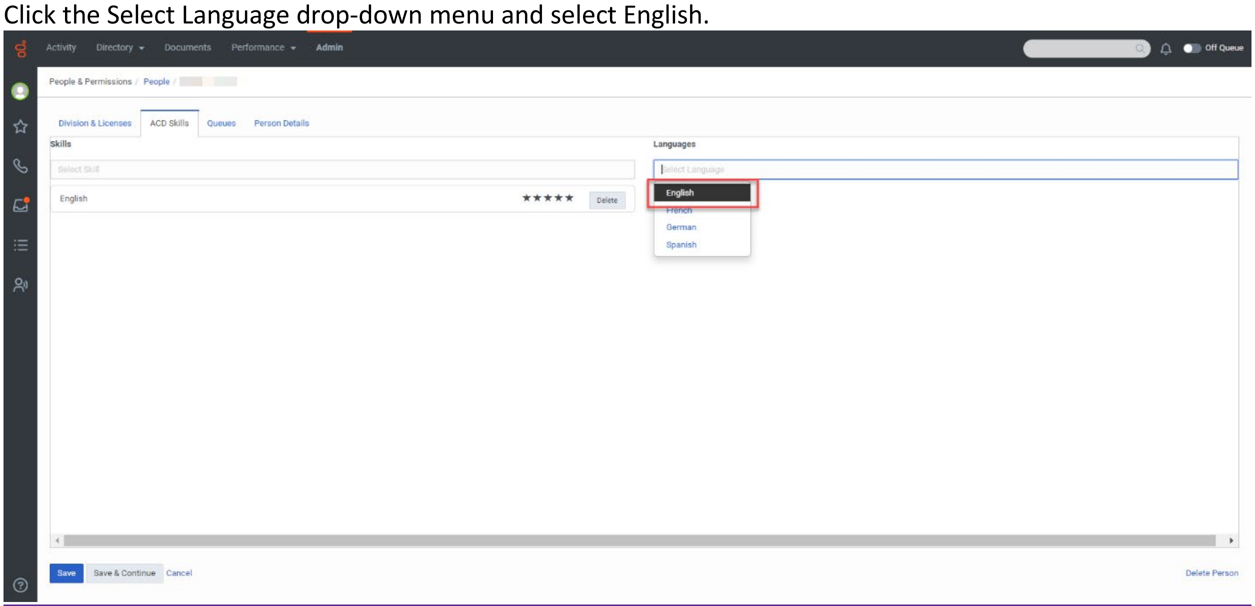
4. Click the Select Skill drop-down menu and select English.



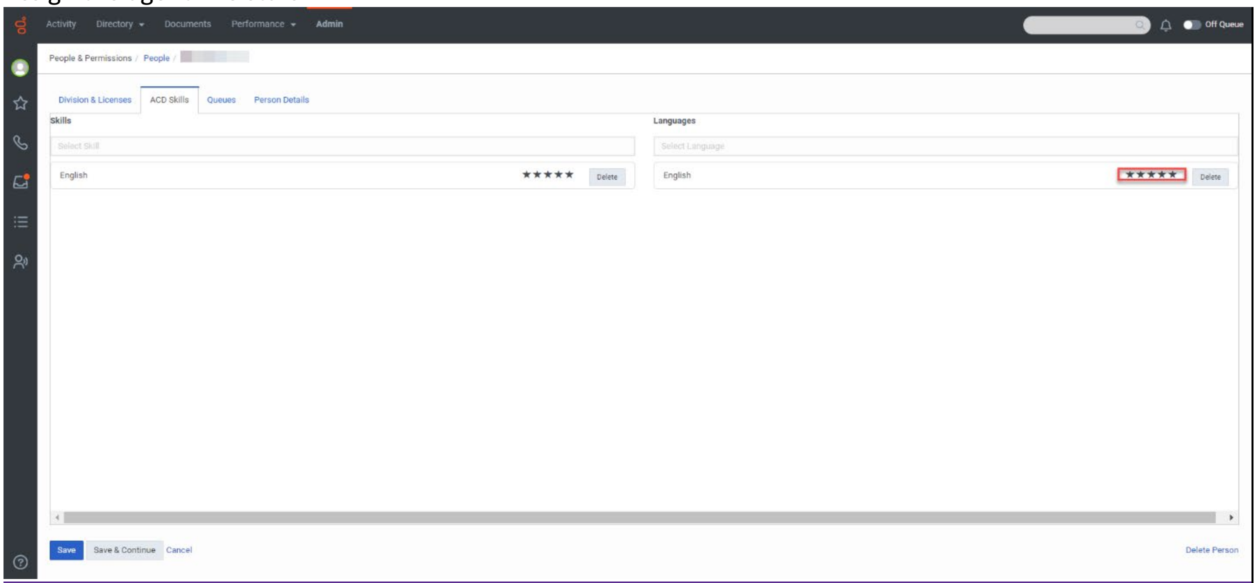
5. Assign the agent five stars.



6. Click the Select Language drop-down menu and select English.



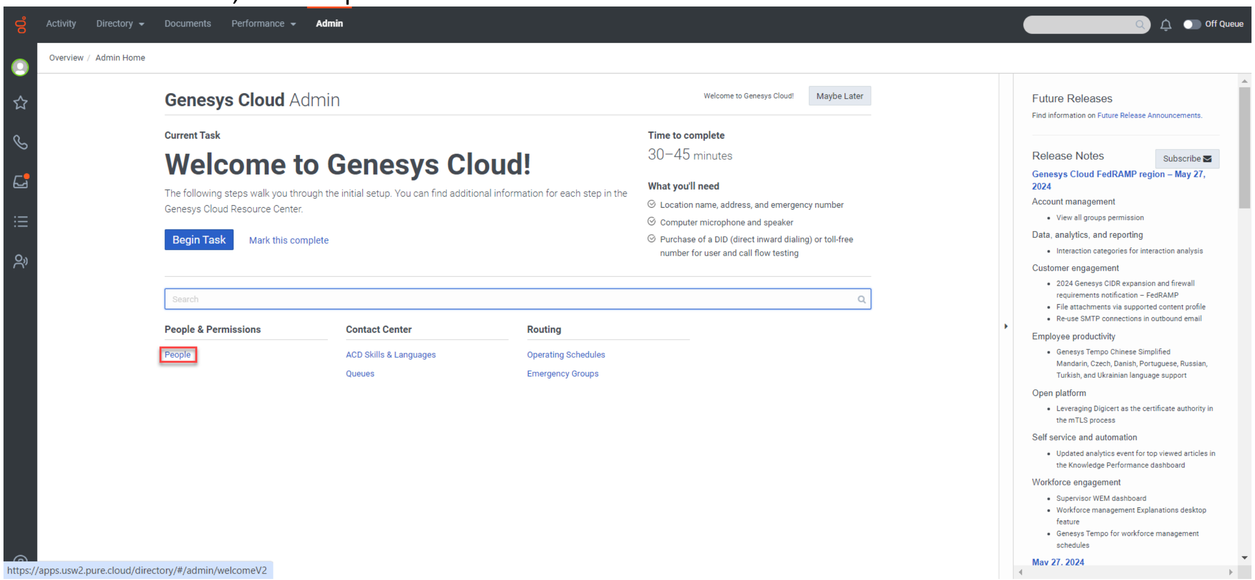
7. Assign the agent five stars.



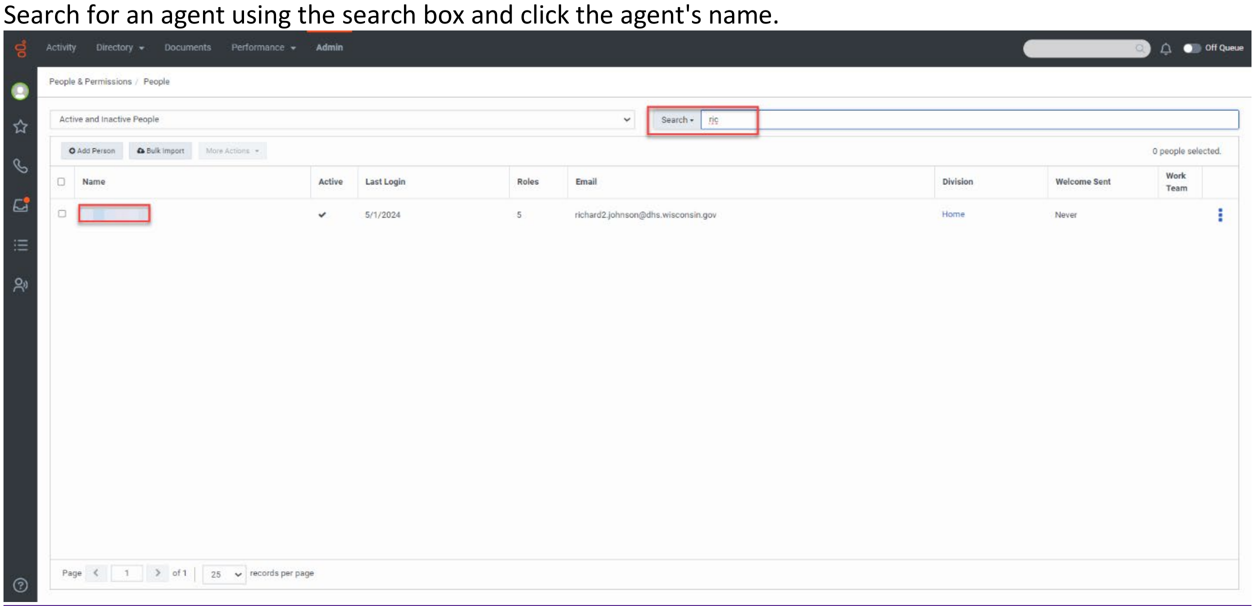
7.7.2 Assign Agent Skills - Spanish

To assign an agent as a Spanish speaker:

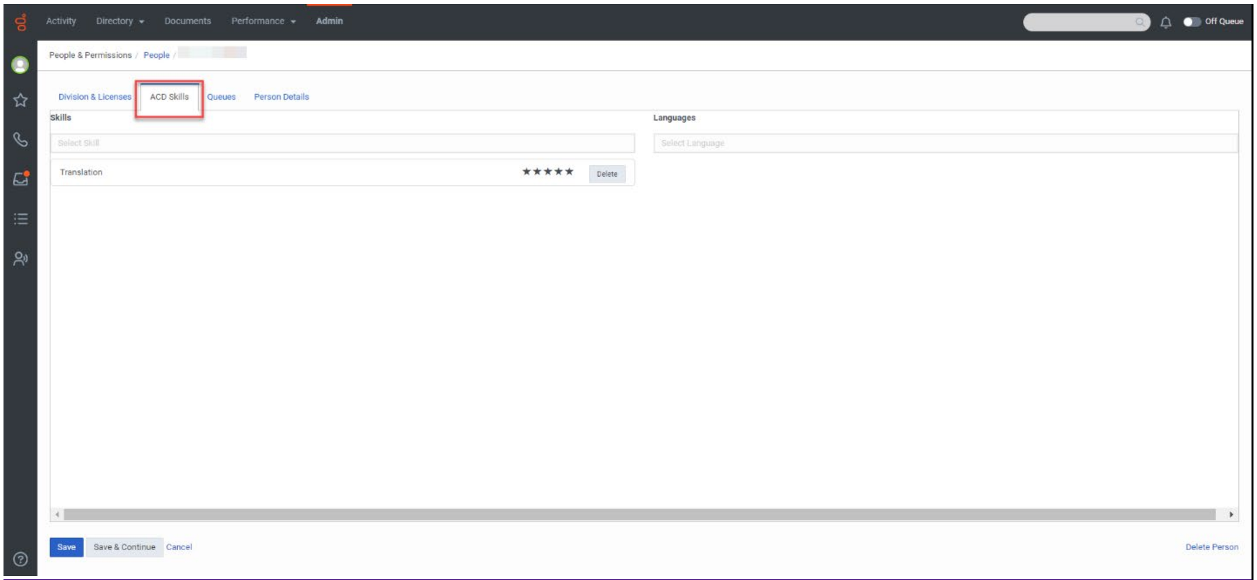
1. From the Admin tab, click People.



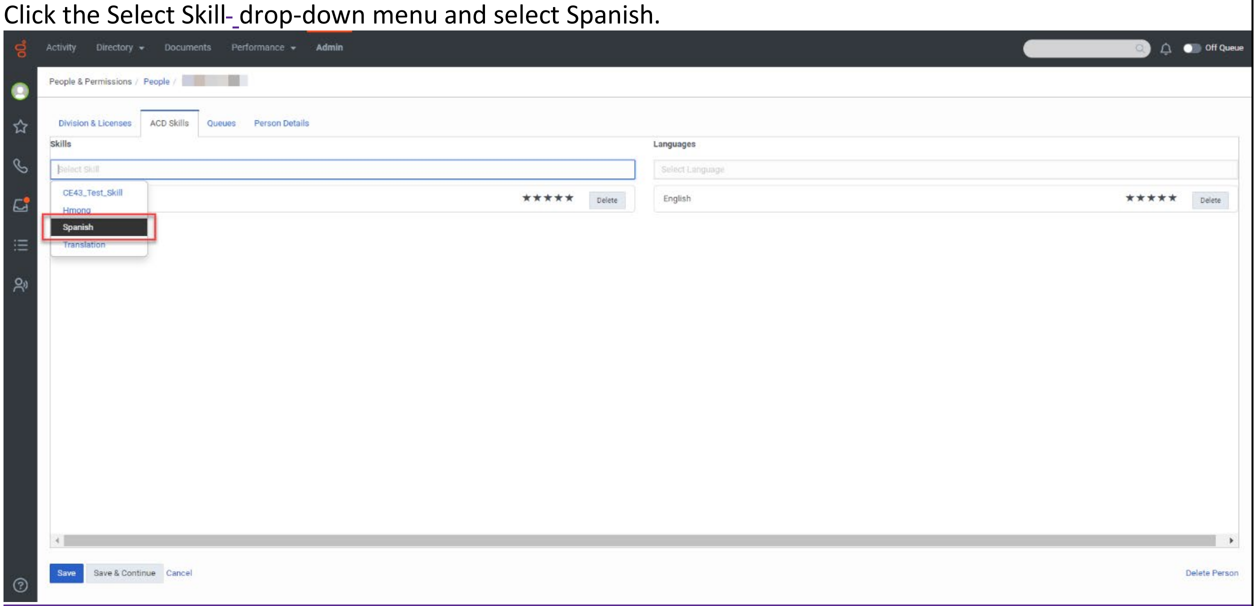
2. Search for an agent using the search box and click the agent's name.



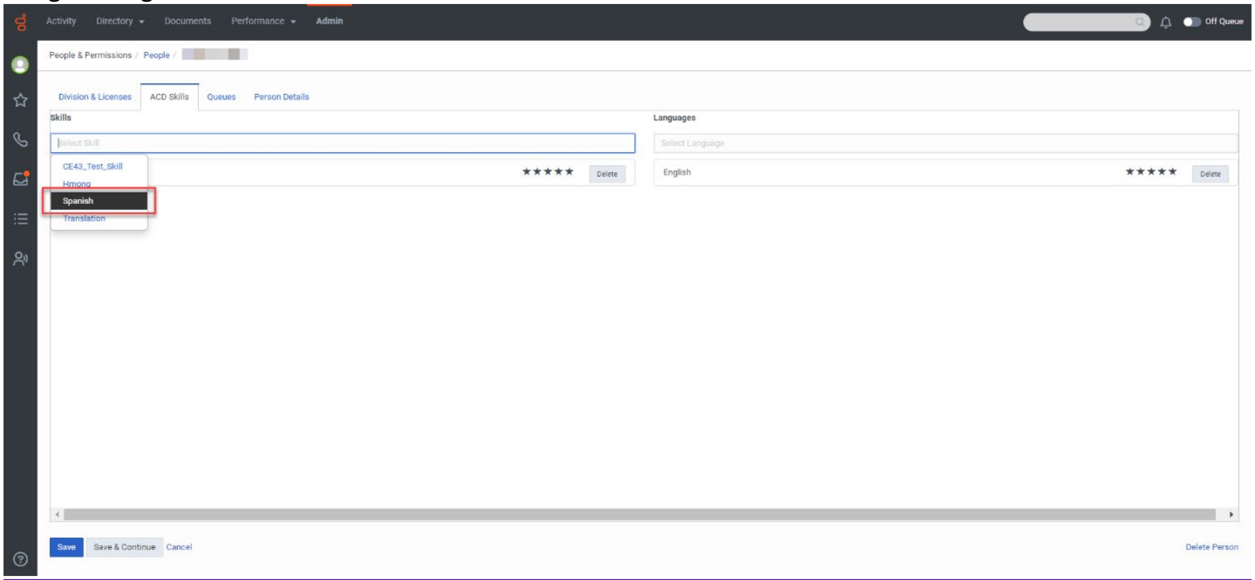
3. Select ACD Skills.



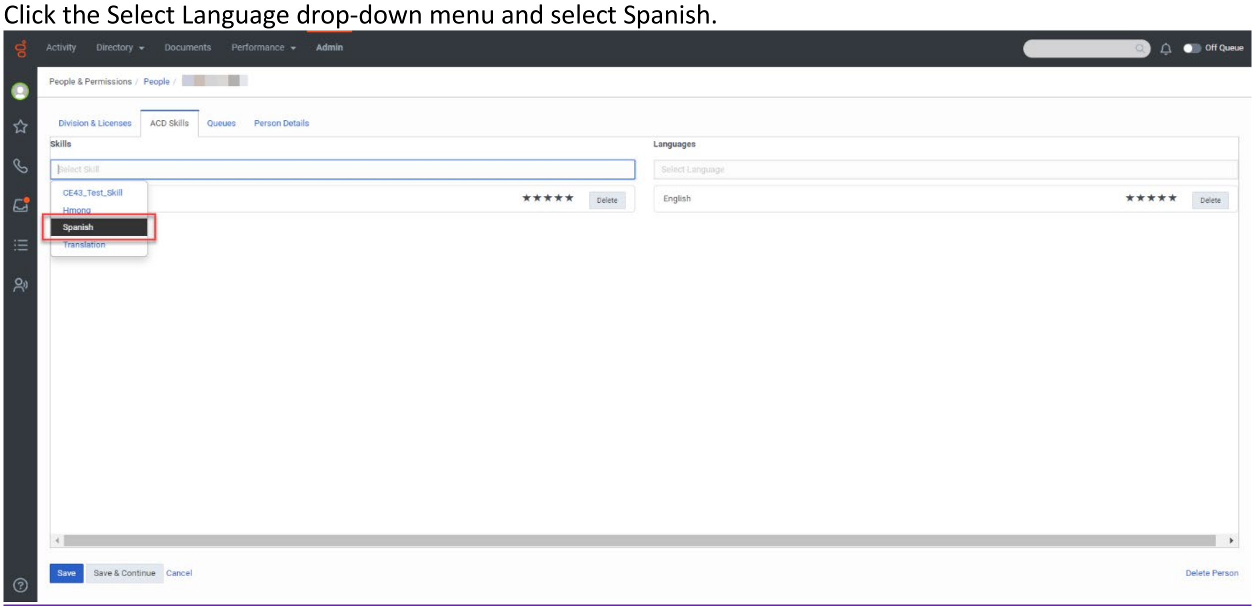
4. Click the Select Skill- drop-down menu and select Spanish.



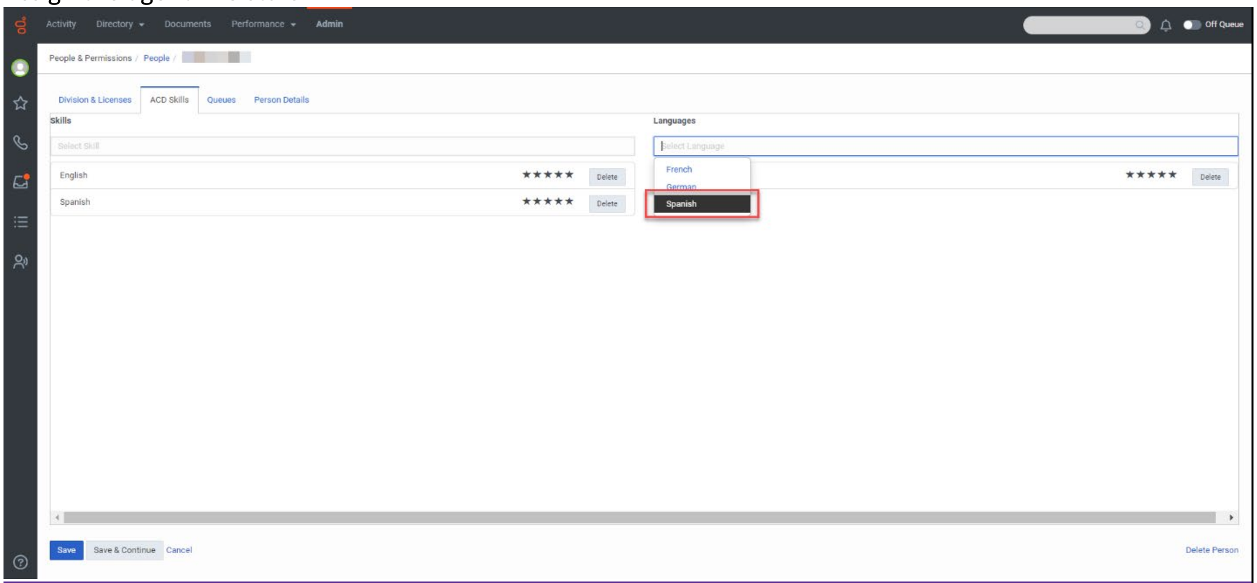
5. Assign the agent five stars.



6. Click the Select Language drop-down menu and select Spanish.



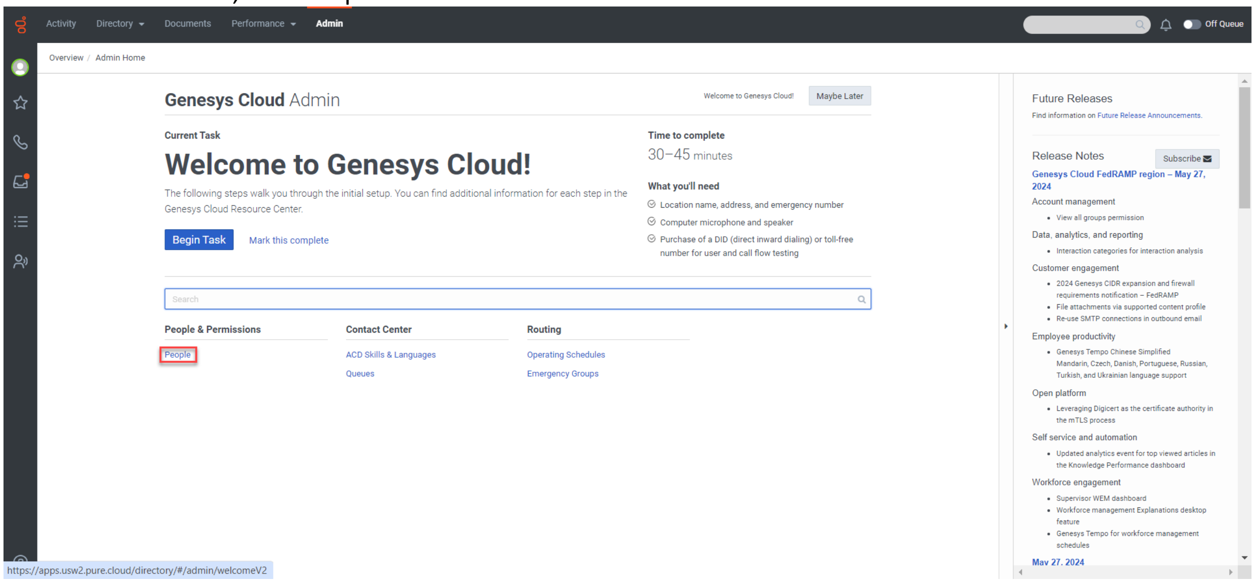
7. Assign the agent five stars.



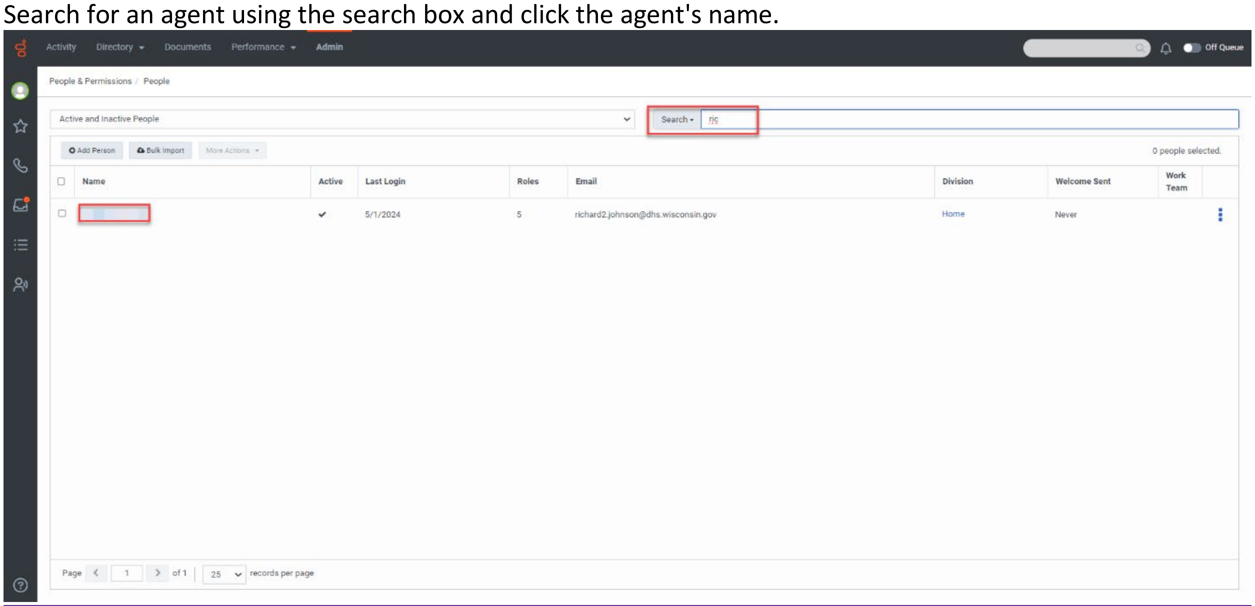
7.7.3 Assign Agent Skills - Hmong

To assign an agent as a Hmong speaker:

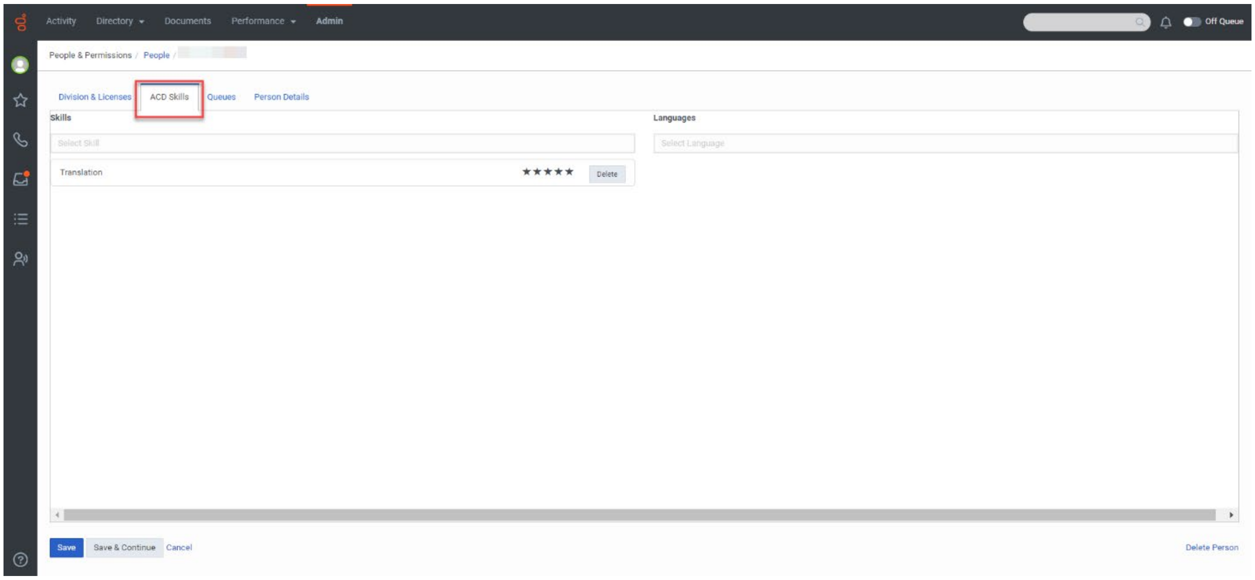
1. From the Admin tab, click People.



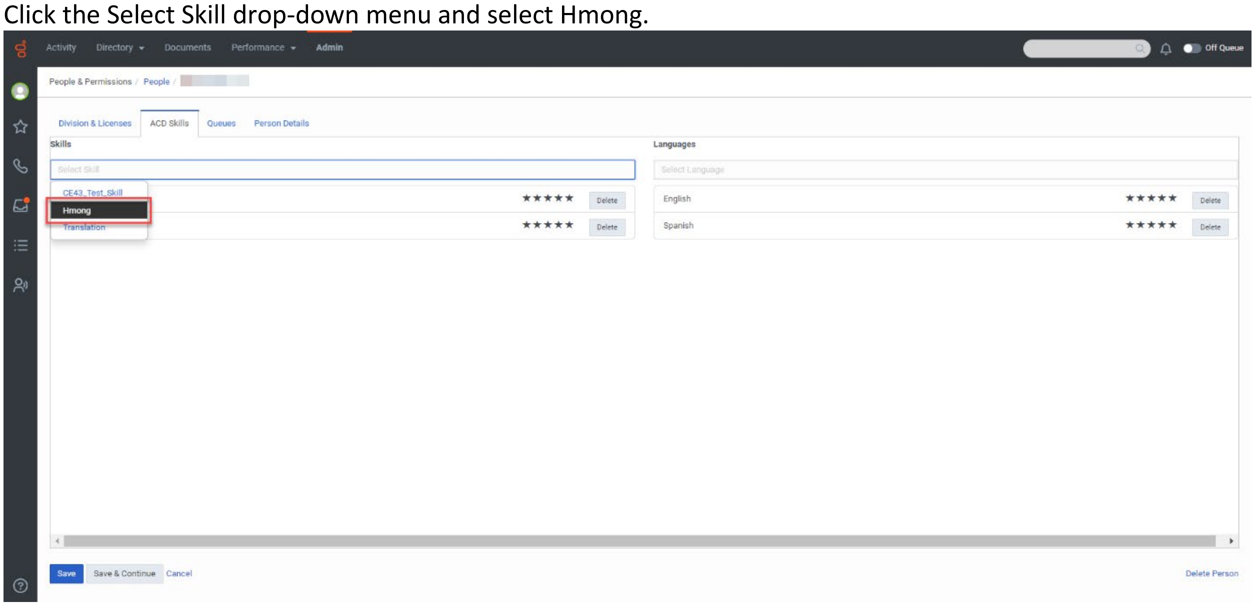
2. Search for an agent using the search box and click the agent's name.



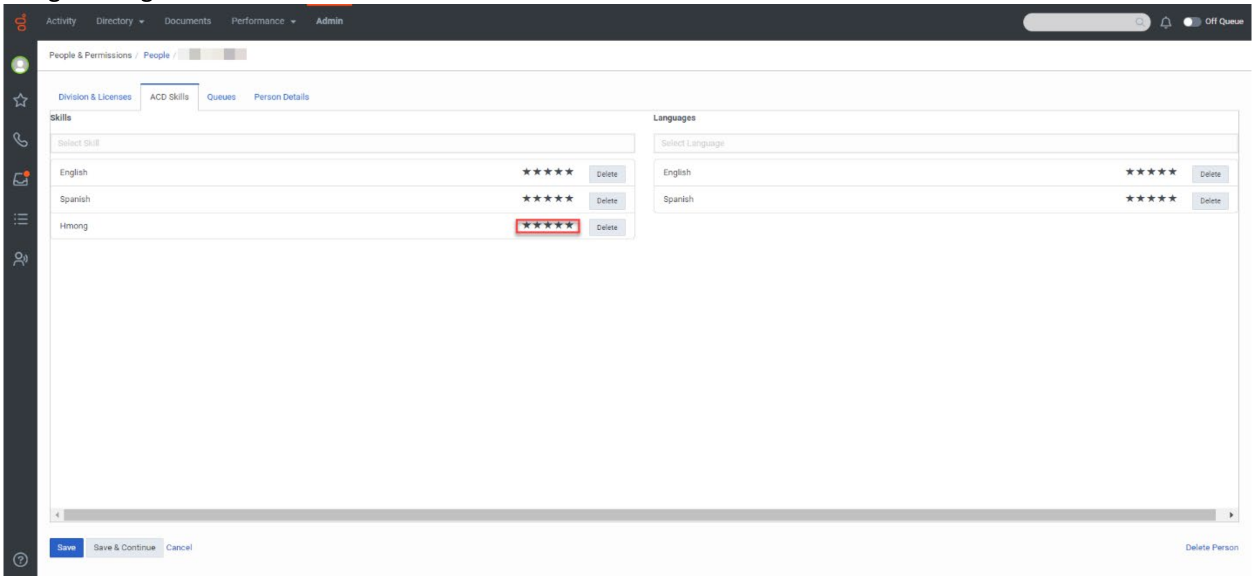
3. Select ACD Skills.



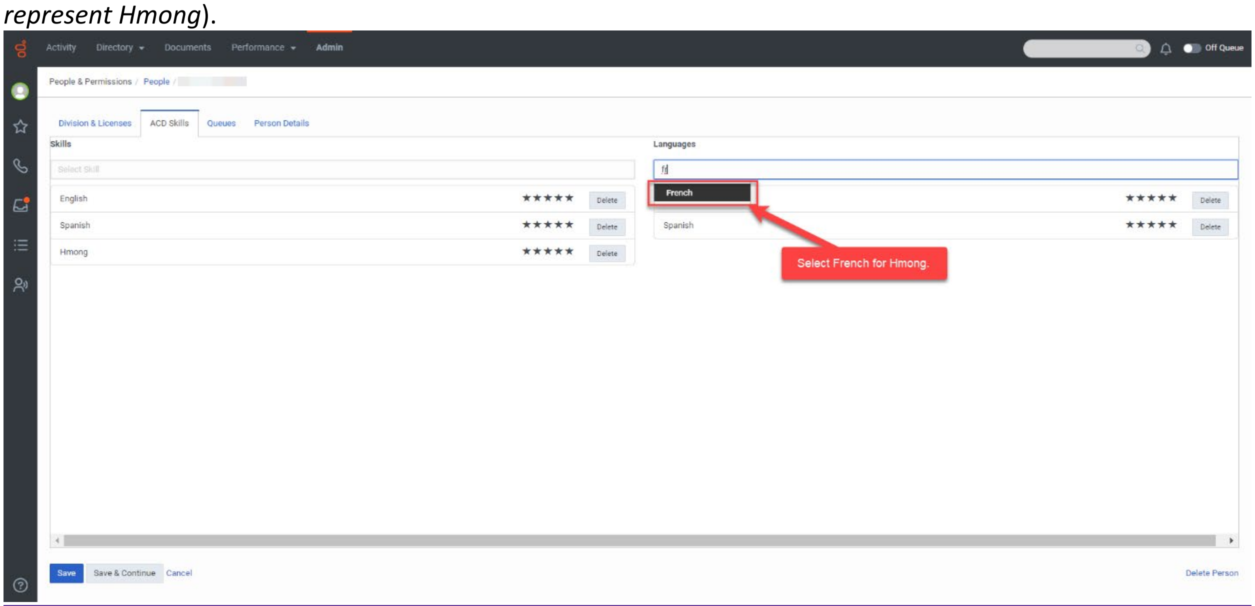
4. Click the Select Skill drop-down menu and select Hmong.



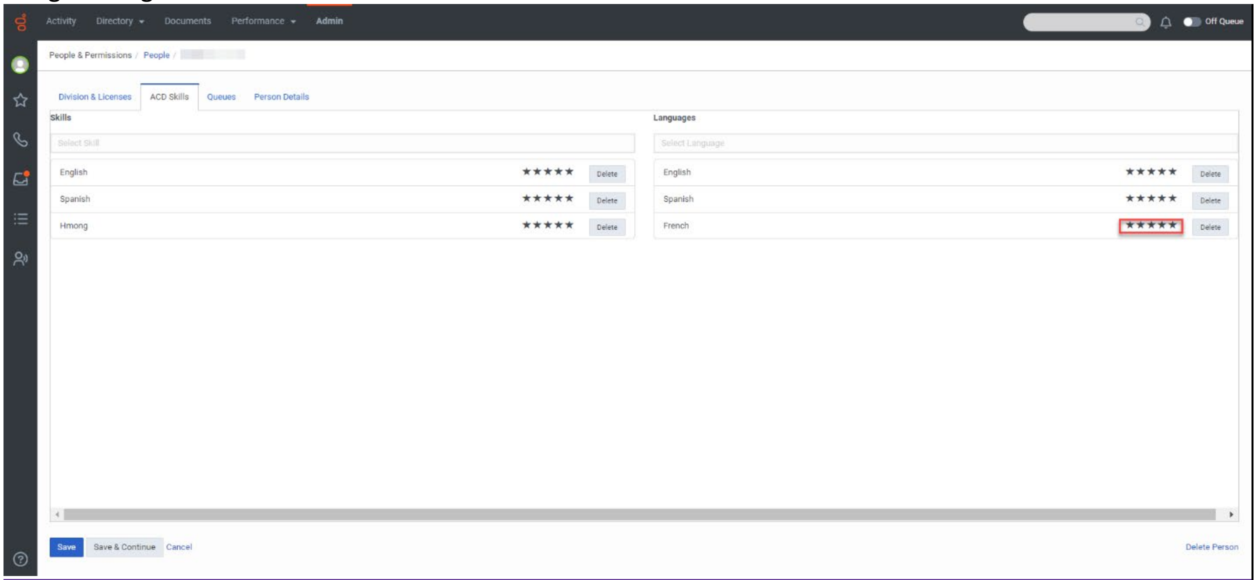
5. Assign the agent five stars.



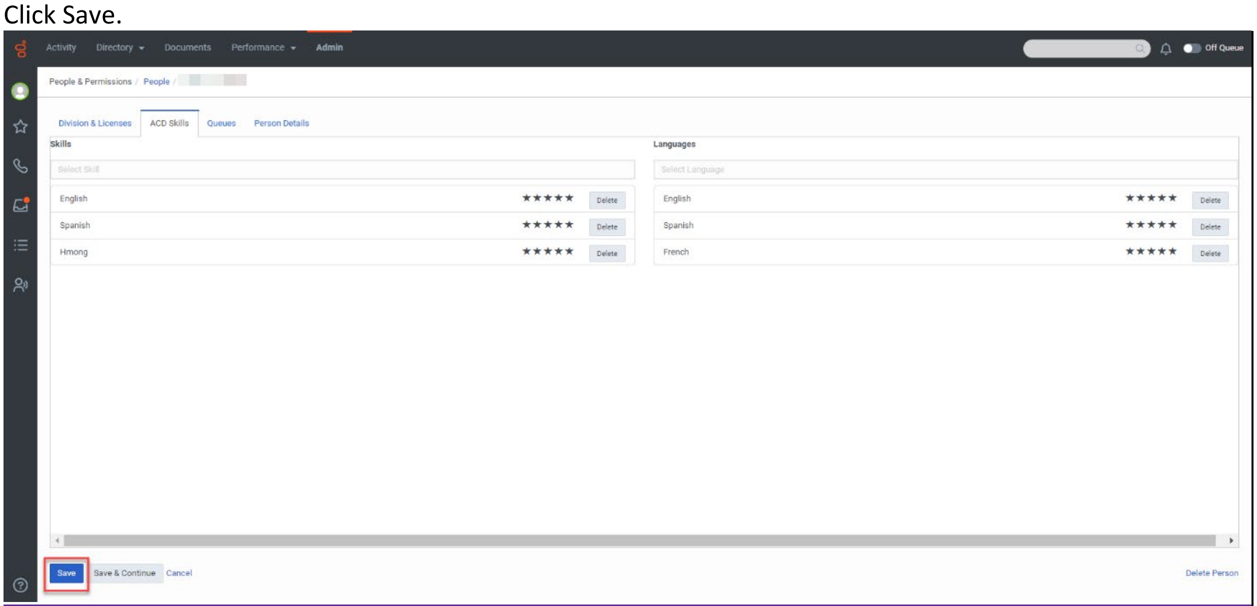
6. Click the Select Language drop-down menu and select French (*the French selection is used to represent Hmong*).



7. Assign the agent five stars.



8. Click Save.



8 Reserved

9 Reserved

10 Reserved

11 Troubleshooting

This section is for troubleshooting problems with Genesys. It is updated as new issues are reported.

If you run into an issue:

1. If you run into an issue:
    1. Make sure you've completed all trainings relevant to your role (agent, supervisor, local admin).
        i. IM worker trainings are on the Learning Center. Agent
            1. Genesys Cloud Agent Introduction_DMS_BEOT
            2. Genesys Cloud Logging In and Out_DMS_BEOT
            3. Genesys Cloud Overview_DMS_BEOT
            4. Genesys Cloud Status Selection_DMS_BEOT
            5. Genesys Cloud Receiving a Call_DMS_BEOT
            6. Genesys Cloud Making a Call_DMS_BEOT
            7. Genesys Cloud Call Handling_DMS_BEOT
            8. Genesys Cloud Queue Voicemail_DMS_BEOT
            9. Genesys Cloud Interaction History_DMS_BEOT
            10. Genesys Cloud Agent Workbook_DMS_BEOT
            11. Genesys Cloud Automated Telephonic Signatures_DMS_BEOT

        ii. Supervisor
            1. Genesys Cloud Supervisor Introduction_DMS_BEOT
            2. Genesys Cloud Call Supervision_DMS_BEOT
            3. Genesys Cloud Performance Overview_DMS_BEOT

        iii. Administrator
            1. Genesys Cloud Administrator Introduction_DMS_BEOT
            2. Genesys Cloud Administrator User Accounts_DMS_BEOT
            3. Genesys Cloud Administrator Business Events_DMS_BEOT

    1. All others should use the links on the Systems Gateway Page.

~~1.~~2. Check if the issue and resolution is provided in this section or in this user guide.

~~2.~~3. If the issue is not in either, see Section 11.1 Submitting a Genesys Support Ticket, for instructions on how to open a ticket and if the issue needs to be escalated.

~~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.~~ • ~~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 in the browser.~~
~~White Label Error~~	~~White Label Error displaying when attempting to access the agent page:~~	• ~~Clear browser history.~~ • ~~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 in the browser.~~
~~Can't log in, invalid credentials~~	~~Agent Desktop log-in:~~	• ~~All Genesys user IDs are case sensitive. Please ensure 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 use of the correct case.~~ • ~~All users are given a temporary password for Platform Administration when their account was created. If the temporary password is 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 use of the correct case.~~ • ~~Be sure to use the correct Tenant: sowi.mgep.info~~
	~~Invalid or forgotten credentials~~	• ~~See Section 2.3 Forgotten Credntials for instructions to recover a WAMS user ID or password.~~

11.1 Submitting a Genesys Support Ticket

Users must submit requests to the State of Wisconsin Help Desk for additional troubleshooting support. The Genesys- Cloud Support Team receives and tracks support requests via the Wisconsin Help Desk.

General questions can be sent to:
~~dhsgenesyscloudproject@dhs.wisconsin.gov~~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~~1.1 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~~1.2 Opening a Ticket

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

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

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

Do	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 Event”	• “Genesys” • “Problems” • “Genesys Issue” • “Genesys isn't working” • “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~~email
- Genesys ~~Place~~phone the agent is logged into
- Connection ID (for calls)
- Screenshots
- 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~~an example of the page~~

Send

To helpdesk@wi.gov

Cc

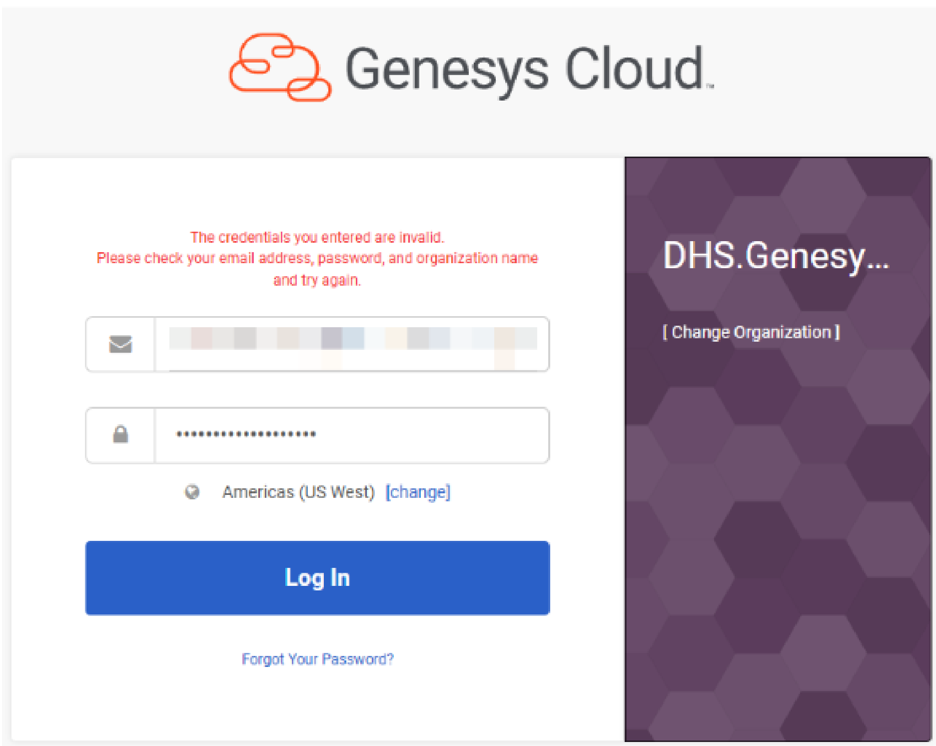
Bcc

Unable to log into Genesys Cloud

Draft saved at 6:49 PM

Hi,

Since this morning I have been unable to log into Genesys Cloud. I was able to log in yesterday. When I attempt to log in, I get the following error



Thanks,

[redacted]

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

11.~~6~~1.3 Escalation Process

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

For ~~"~~Critical~~"~~ or ~~"~~High~~"~~ priority issues, cc dhsgenesyscloudproject@dhs.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@dhs.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.~~

11.1.4 Prioritization

Tickets opened with the Wisconsin Help Desk are prioritized base on impact to the call center. The chart below describes how tickets are prioritized and what the target response time is for the support team.

Issue	Definition of Issue	Target Response Team
Critical	Renders entire system unusable with no workaround.	Immediate
High	Issues that have significant repercussions but do not cause the whole system unusable. Multiple users, or multiple locations are unable to receive or make calls, having significant effect on a call center's ability to operate. Application outage affecting multiple users.	Immediate
Normal	Little or no obstruction to operations of a call center. Single users, single location unable to receive or make calls.	Same day next day
Low	Routine support requests that do not affect any users' ability to receive or make calls.	Prioritized against other work according to deadlines, importance, etc.

Other Requests

User Adds: Target response time is approximately three to five business days.

User Edits and Deactivations: Target response time is ASAP. If a deactivation is critical for security, please escalate. See SECTION 11.1.3 ESCALATION PROCESS.

Genesys handbook has been restructured for the Genesys CX Cloud platform update. Legacy Genesys (MGEP) has been removed.

~~1 Introduction to Genesys~~

~~(Video instructions available: Introduction to Genesys)~~

~~Genesys is the cloud-based call management system used by IM workers to receive, make, and transfer calls, and listen to voicemail. Genesys is an online platform that does not require users to download anything to their computers. This guide explains the Agent Desktop, Designer, Interaction Recording, Platform Administration, and Reporting tiles in the application that enable call center functions.~~

~~The Genesys User Guide is organized by sections:~~

- ~~Sections 1 through 6: Overview of general agent capabilities that any user can do~~
- ~~Section 7: Overview of supervisor capabilities~~
- ~~Section 8: Overview of segment administrator capabilities~~
- ~~Section 9: Overview of reporting~~
- ~~Section 10: Overview of local passwords~~
- ~~Section 11: Troubleshooting solutions for Genesys~~

~~2 Accessing Genesys~~

~~This section explains how to log in and out of the Agent Desktop and how to recover lost credentials.~~

~~2.1 Logging on to Agent Desktop~~

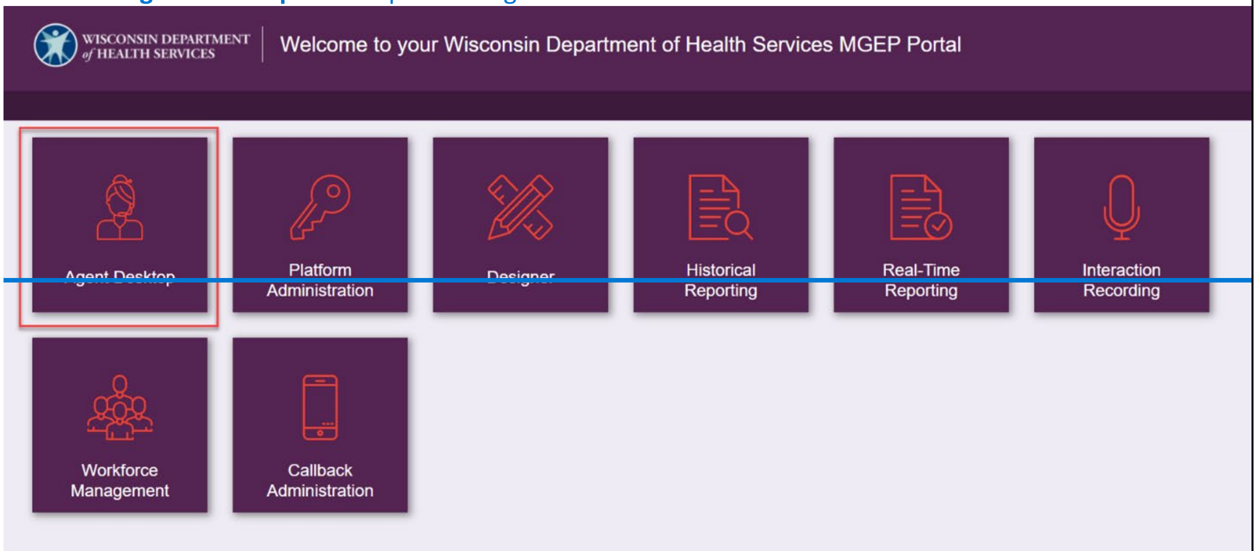
~~(Video instructions available: Logging on to Agent Desktop)~~

~~Agents log in to Genesys from the Genesys Portal. These instructions can be used by agents, supervisors, and segment administrators.~~

~~To log in to Genesys as an agent:~~

1. ~~Open the Genesys Portal with Firefox, Edge, or Chrome.~~

~~2. Select the **Agent Desktop** tile to open the log in screen~~

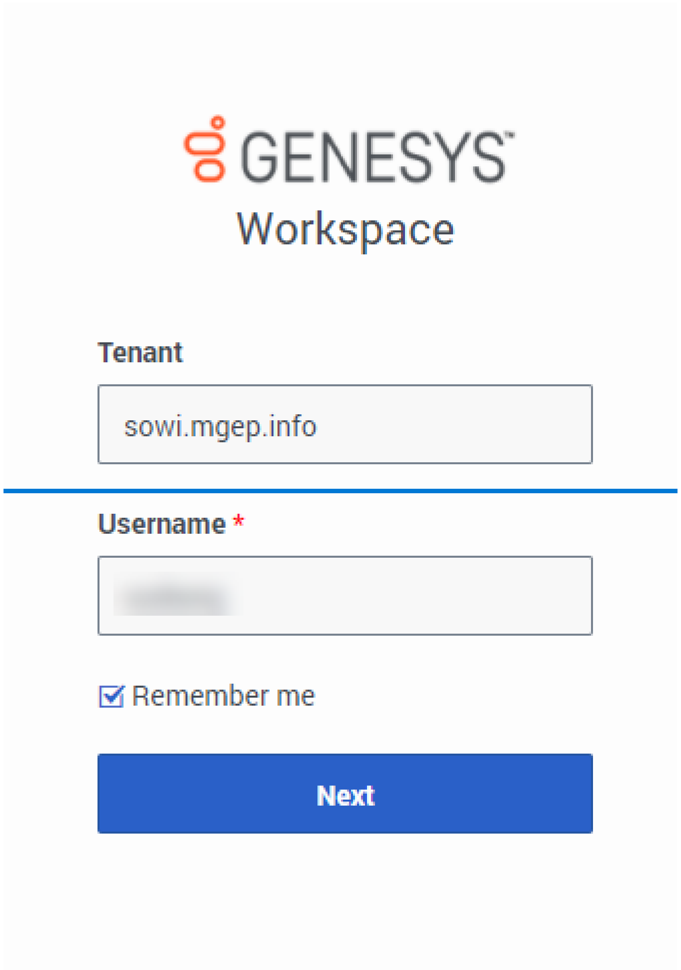


~~3. Complete the Tenant and Username fields with:~~

~~1. Tenant: Enter sowi.mgep.info~~

~~2. Username: Enter your WAMS ID (case sensitive)~~

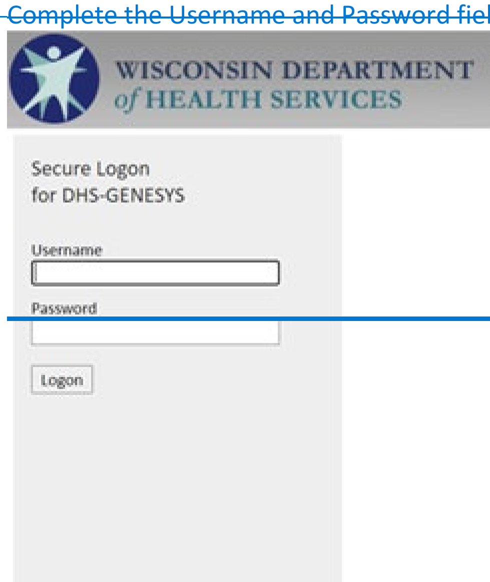
~~**Note:**~~	~~You will use the same Tenant text each time you log in.~~



~~4.~~

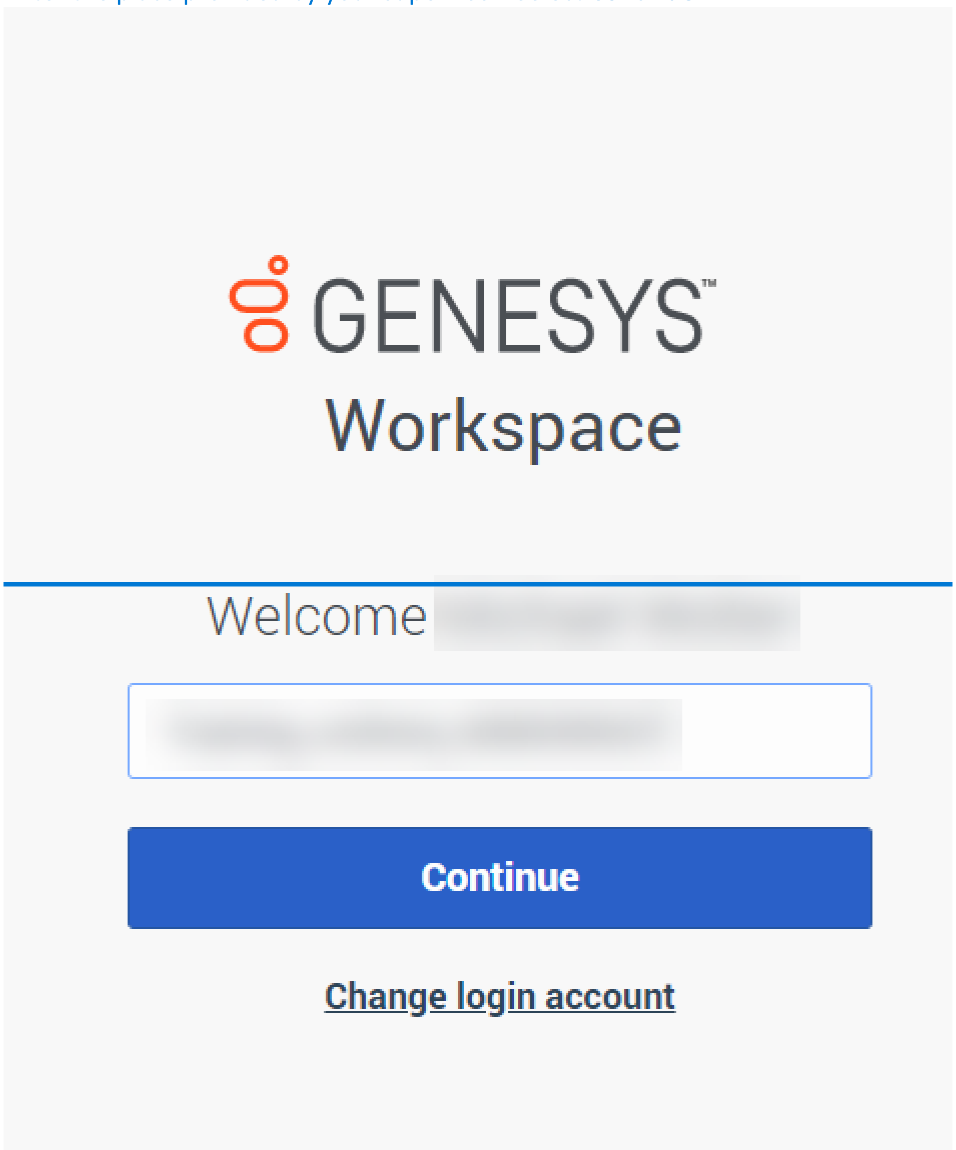
~~5. Select **Next**.~~

~~6. Complete the Username and Password fields with your case sensitive WAMS log-in information.~~



~~7. Select **Logon**.~~

~~8. Enter the place provided by your supervisor. Select **Continue**.~~



~~After logging in, you will be taken to the Connect View Tab (see 3.2 Connect View Tab). Your Genesys phone status appears as Not Ready.~~

~~2.2 Logging off the Agent Desktop~~

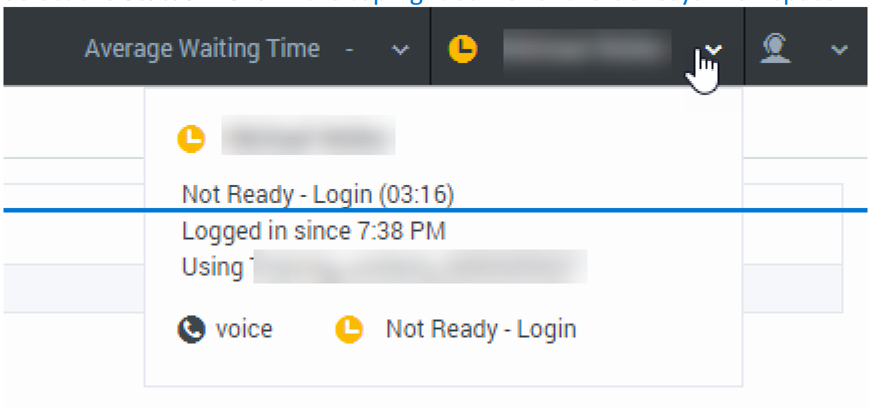
~~(Video instructions available: Logging off the Agent Desktop)~~

~~You must log off Genesys from the Genesys Portal at the end of your workday.~~

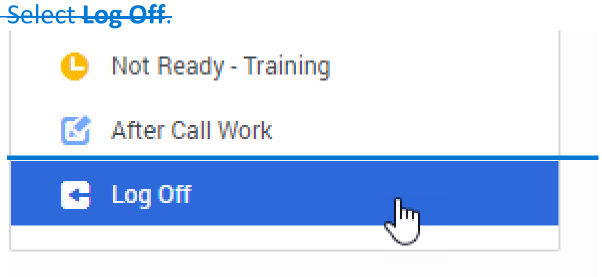
~~**Note:**~~	~~It is extremely important to select the log off status before exiting Genesys or you may continue to receive calls to your phone.~~

~~To log off the Genesys Workspace:~~

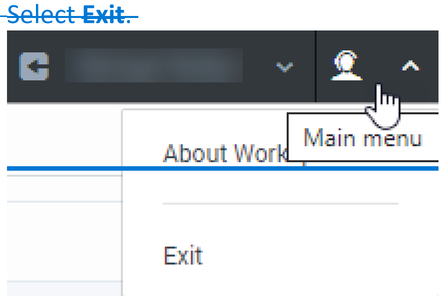
1. ~~Select the **Status Menu** in the top right corner of the Genesys Workspace.~~



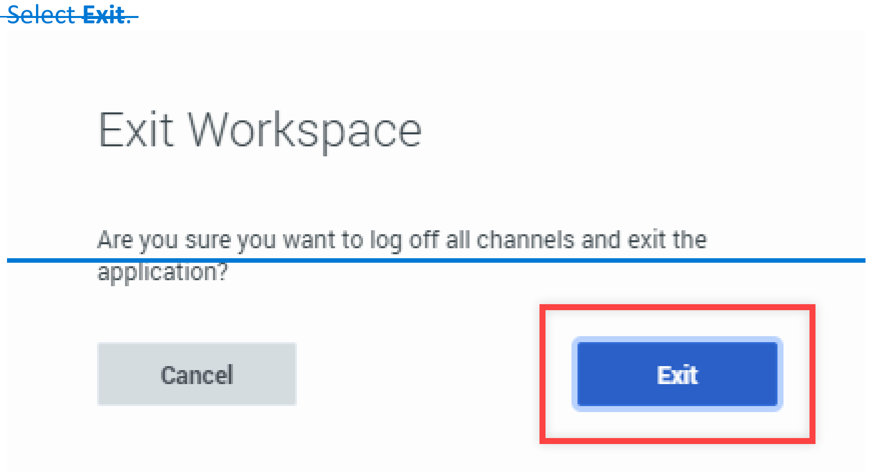
2. ~~Select **Log Off**.~~



3. ~~Select the **Main Menu** icon.~~
4. ~~Select **Exit**.~~



5. ~~Select **Exit**.~~



~~After logging off, you will be taken to the main logon screen for the Genesys Workspace.~~

~~2.3 Forgotten Credentials~~

~~(Video instructions available: Forgotten Credentials)~~

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

~~Use these instructions recover a forgotten WAMS user ID or password:~~

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

   -

   ~~The user can attempt to sign in as many times as needed, after three unsuccessful login attempts, the user is locked out of all applications that require use of a WAMS ID.~~
   ~~*Show/Hide an example of the page*~~
3. ~~Follow the Wisconsin User ID Account Recovery instructions on the Wisconsin User ID page.~~
   ~~*Show/Hide an example of the page*~~

~~3 Agent Desktop~~

~~3.1 Agent Desktop Workspace (Video instructions available: Agent Desktop Workspace)~~

~~3.2 Connect View Tab (Video instructions available: Connect View Tab)~~

~~3.3 Monitor View Tab~~

~~3.4 Voice Interaction Window (Video instructions available: Voice Interaction Window)~~

~~This section describes the different tabs that agents can use within the Genesys workspace. Supervisors and administrators have access to additional screens (see Section 7 Supervisors and Section 8 Segment Administrators).~~

~~3.1 Agent Desktop Workspace~~

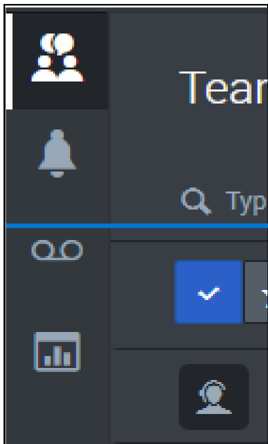
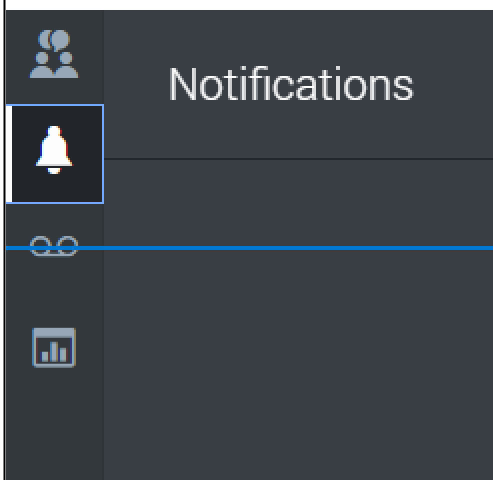
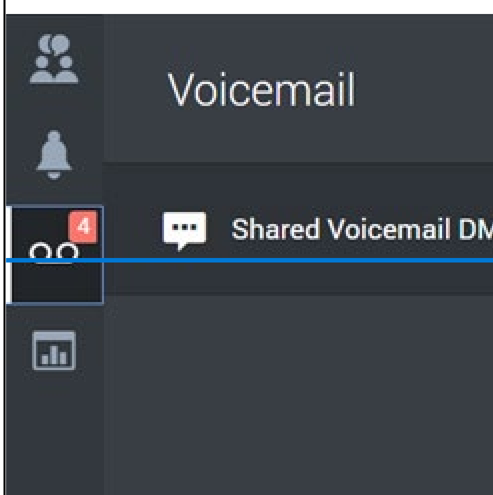
~~(Video instructions available: Agent Desktop Workspace)~~

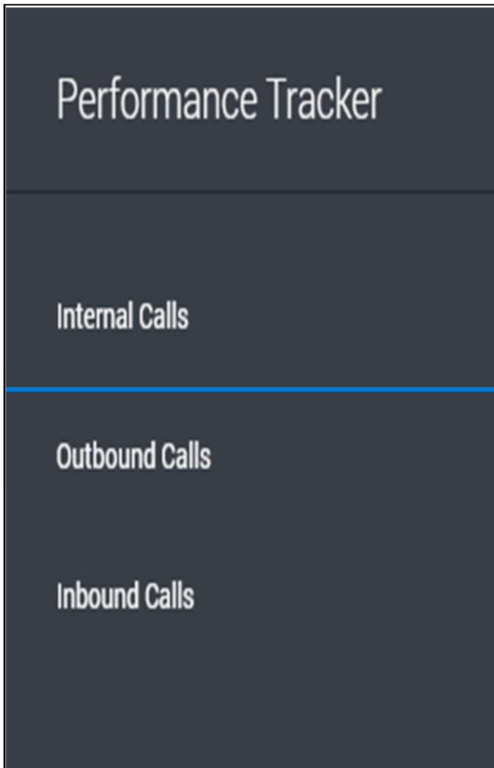
~~The Agent Desktop workspace is split between the left sidebar and the top navigation bar. The sidebar has links to useful tools that open in a pop-up menu. The top navigation bar includes two tabs and your current status.~~

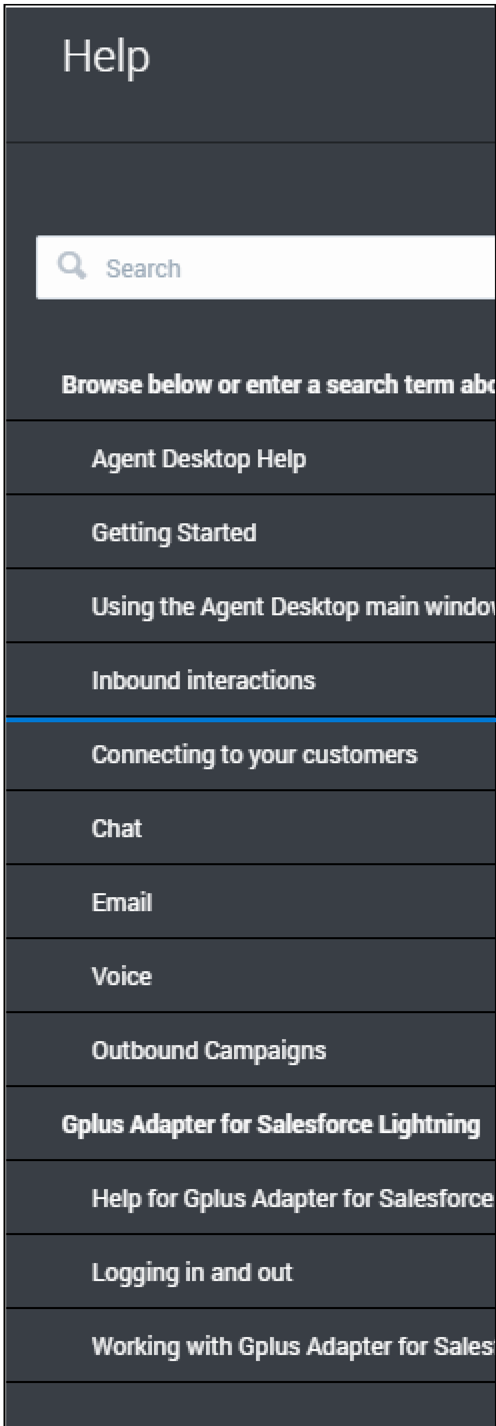
~~**Sidebar**~~

~~The sidebar links to:~~

~~Team Communicator~~	~~Used to dial external numbers and internal contacts, set certain numbers or contacts as favorites, and view a history of outbound calls.~~

<table>
<tr><td></td><td></td></tr>
<tr><td>~~Notifications~~
</td><td>~~Indicates any potential errors in the system.~~</td></tr>
<tr><td>~~Voicemail~~
</td><td>~~Indicates when any voicemails are in assigned queue.~~</td></tr>
<tr><td>~~Performance Tracker~~</td><td>~~Provides information on the number of internal, outbound, and inbound calls for the day.~~</td></tr>
</table>

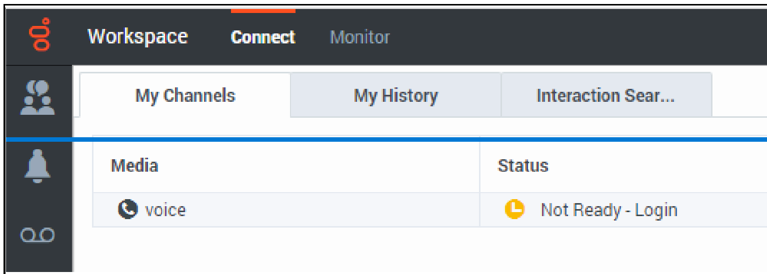
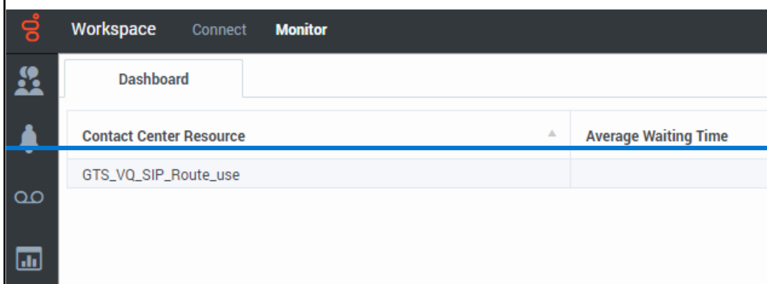
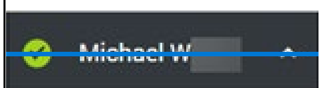
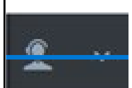
<table>
<tr><td>
</td><td></td></tr>
<tr><td>~~Help~~</td><td>~~Includes a search field and a browsable library to help answer questions and provide more information about Genesys.~~
~~The Help section is a secondary source of information that supplements the Genesys user guide.~~</td></tr>
</table>



~~**Top Navigation Bar**~~

~~The Top navigation bar links to:~~

~~Connect View Tab~~	~~Shows the media you use, your current status, and previous calls. See 3.2 Connect View Tab~~

<table>
<tr><td>
</td><td></td></tr>
<tr><td>~~Monitor View Tab~~

</td><td>~~Shows the specific statistics of your agency. This information may not be available. See 3.3 Monitor View Tab~~</td></tr>
<tr><td>~~Agents Status~~
</td><td>~~Shows your status. See 4 Setting a Status~~</td></tr>
<tr><td>~~Main Menu~~
</td><td>~~Used to log off the Agent Desktop. See 2.2 LOGGING OFF THE AGENT DESKTOP.~~</td></tr>
</table>

~~3.2 Connect View Tab~~

~~(Video instructions available: Connect View Tab)~~

~~Agents can see call data using the Connect View Tab's three views.~~

~~My Channels~~

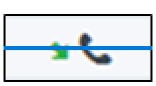
~~The My Channels view summarizes the type of media you use, current status, and amount of time in the current status.~~

~~Show/Hide an example of the page~~

~~My History~~

~~The My History view shows previous calls. This view is the best way to search for a call.~~

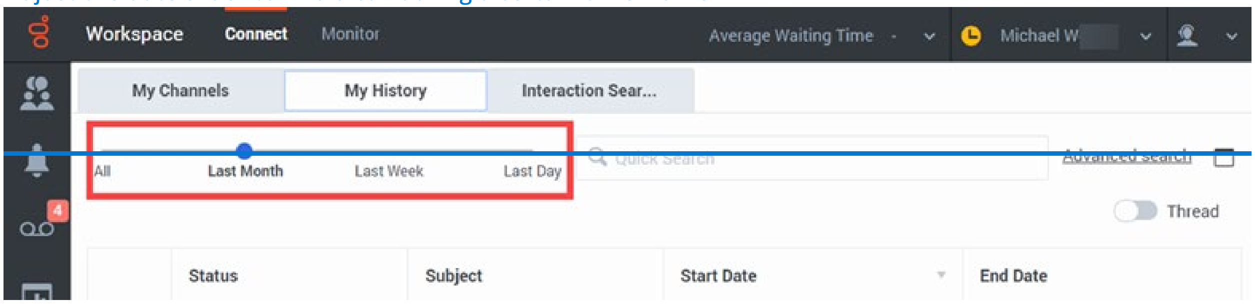
~~Inbound calls have a green arrow next to the phone icon.~~



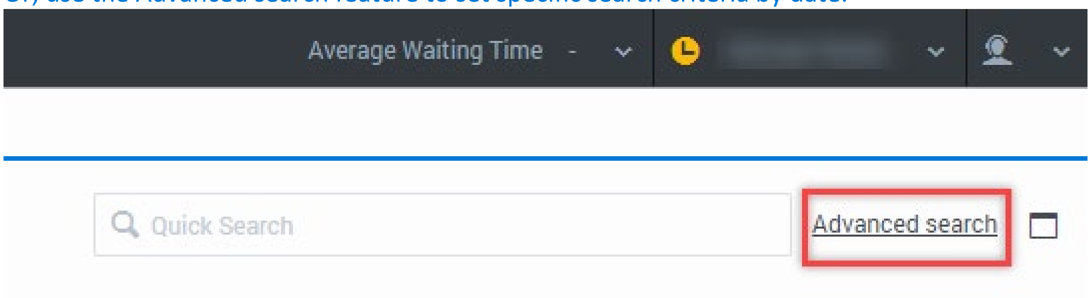
~~Outbound calls have a yellow arrow next to the phone icon.~~

~~Show/Hide an example of the page~~

~~Adjust the date slider to find a call during a certain time frame.~~

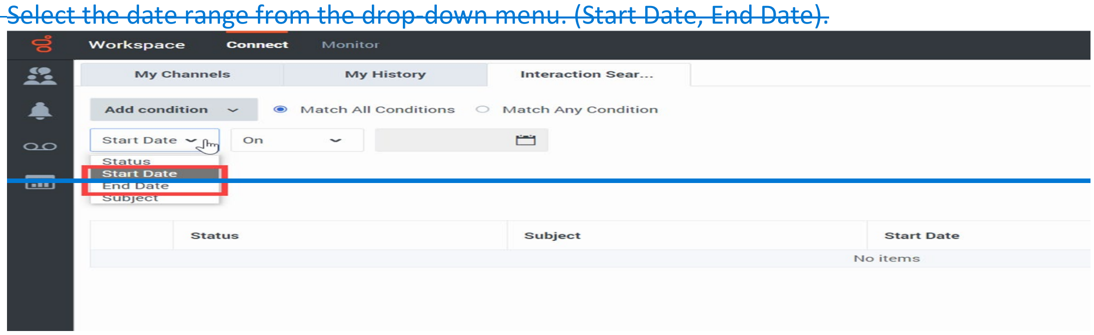


~~Or, use the Advanced search feature to set specific search criteria by date.~~

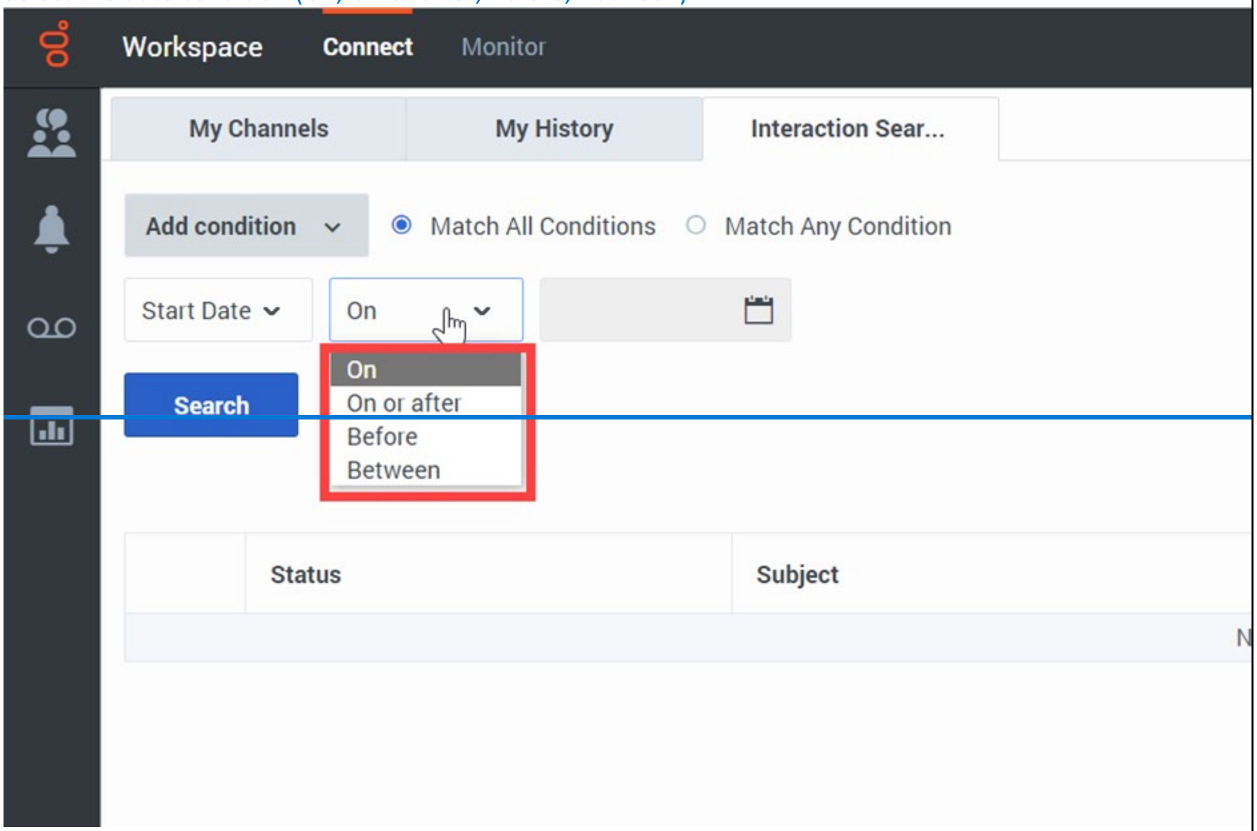


~~Here are the steps to search for a call using Advanced search:~~

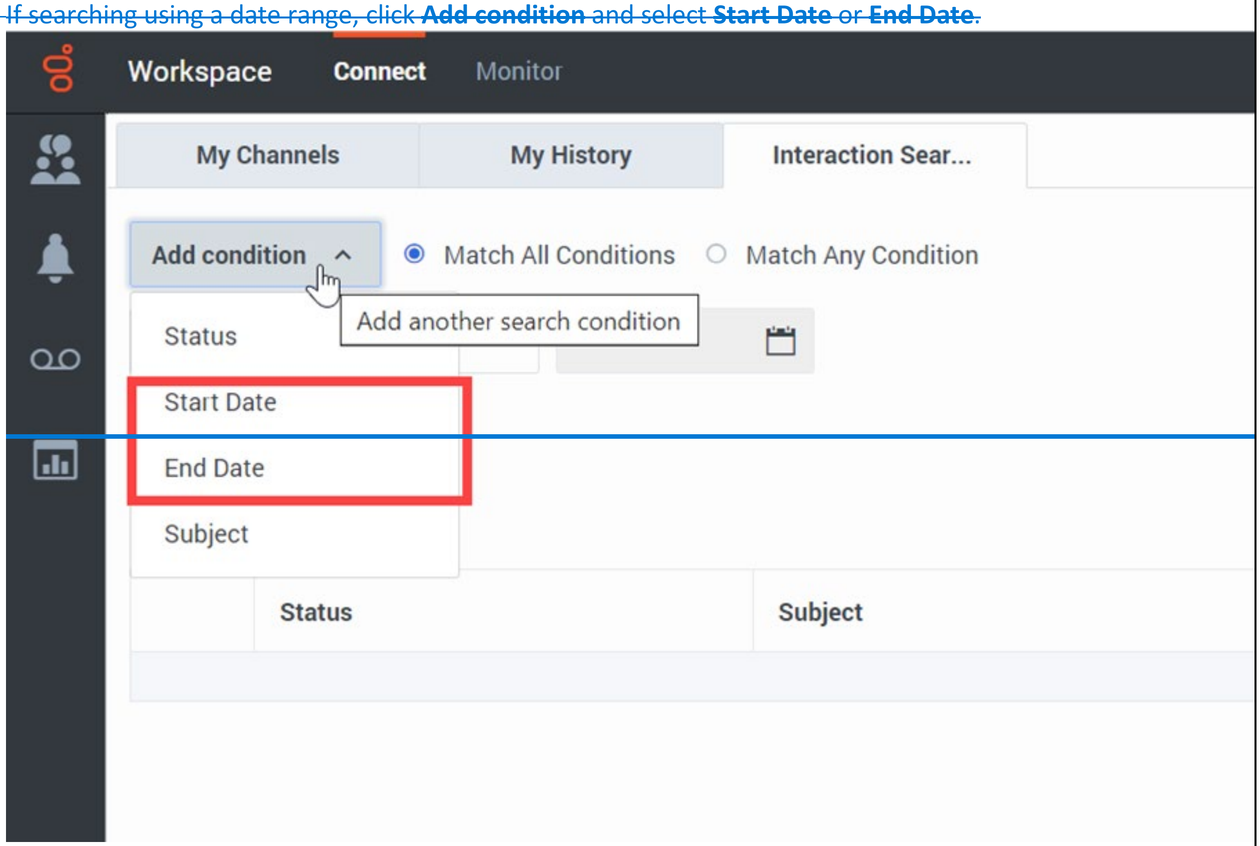
~~1. Select the date range from the drop-down menu. (Start Date, End Date).~~



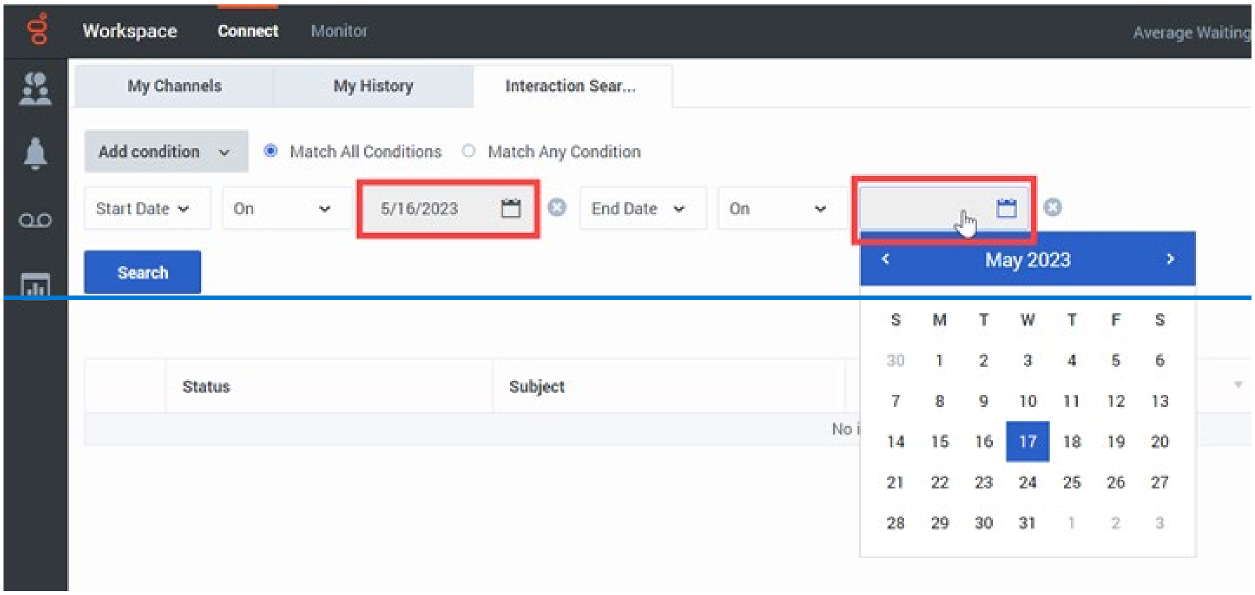
~~2. Select the date condition (On, On or after, Before, Between).~~



~~3. If searching using a date range, click **Add condition** and select **Start Date** or **End Date**.~~

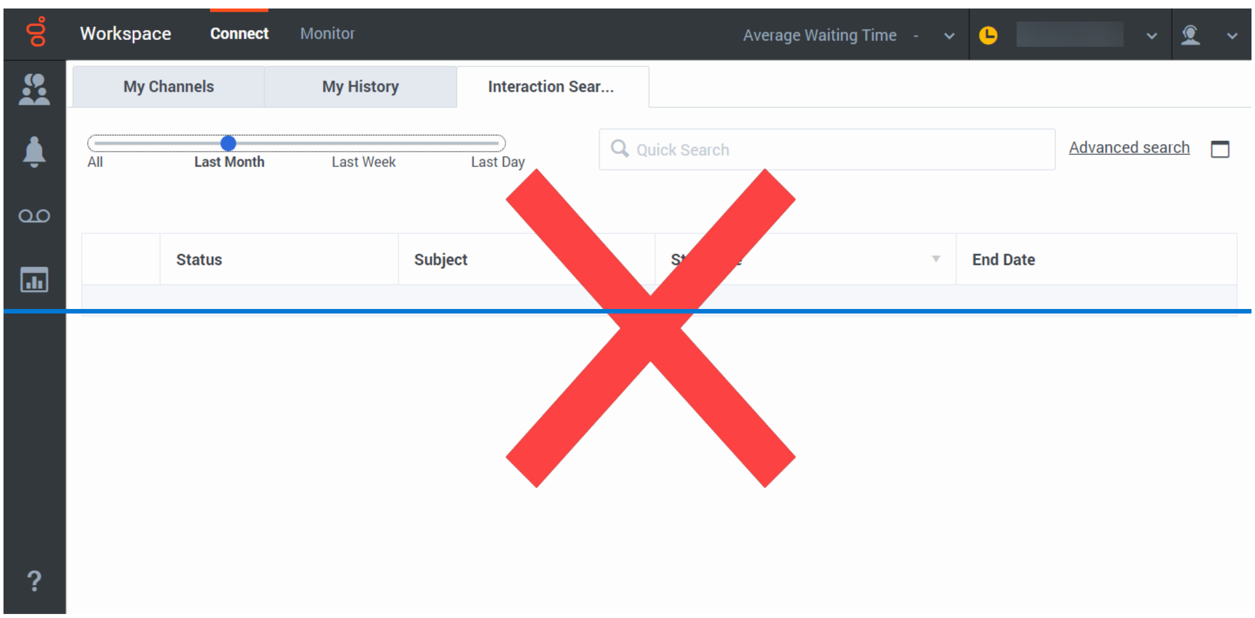


~~4. Select the date or dates from the calendar.~~



~~Interaction Search~~

~~Do not use the Interaction Search view to search for calls. Always use the My History view instead.~~



~~3.3 Monitor View Tab~~

~~The Monitor View tab is not visible to all agents. The Monitor View tab houses the Dashboard tab, which shows contact center statistics in real time and the queues of the agent's specific group. The Dashboard tab is not visible to all agents. Focus on the queues ending in "use." This page is informational only.~~

~~Show/Hide an example of the page~~

~~The specific statistics displayed may vary by agency but include:~~

- ~~Oldest Call Waiting: How long the oldest call currently in the queue has been waiting.~~

- ~~Average Wait Time (AWT): Average wait time (for the day) for all calls answered and abandoned.~~

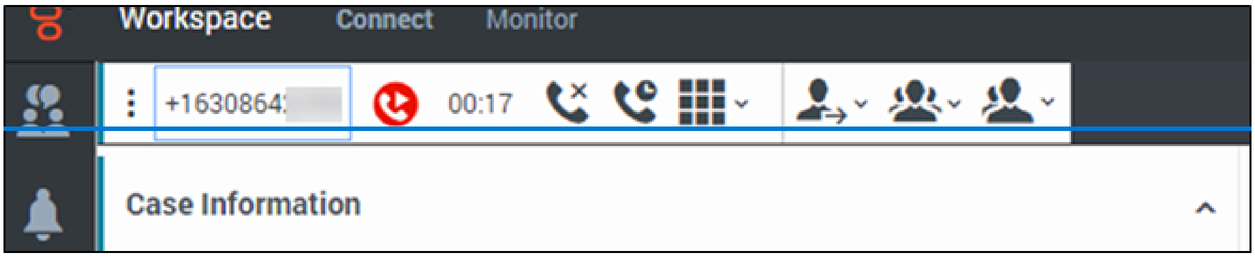
~~**Note**~~	~~AWT is not the same as Average Speed of Answer (ASA). ASA is only answered calls. ASA is not visible in this view.~~

- ~~Calls In Queue: Current number of calls in the queue waiting for agents.~~

~~3.4 Voice Interaction Window~~

~~(Video instructions available: Voice Interaction Window)~~

~~The Voice Interaction window opens during a call. It contains an Interaction Bar for call functions and the "Case Information" section for call information and disposition codes (if your agency uses them).~~



~~**Interaction Bar**~~

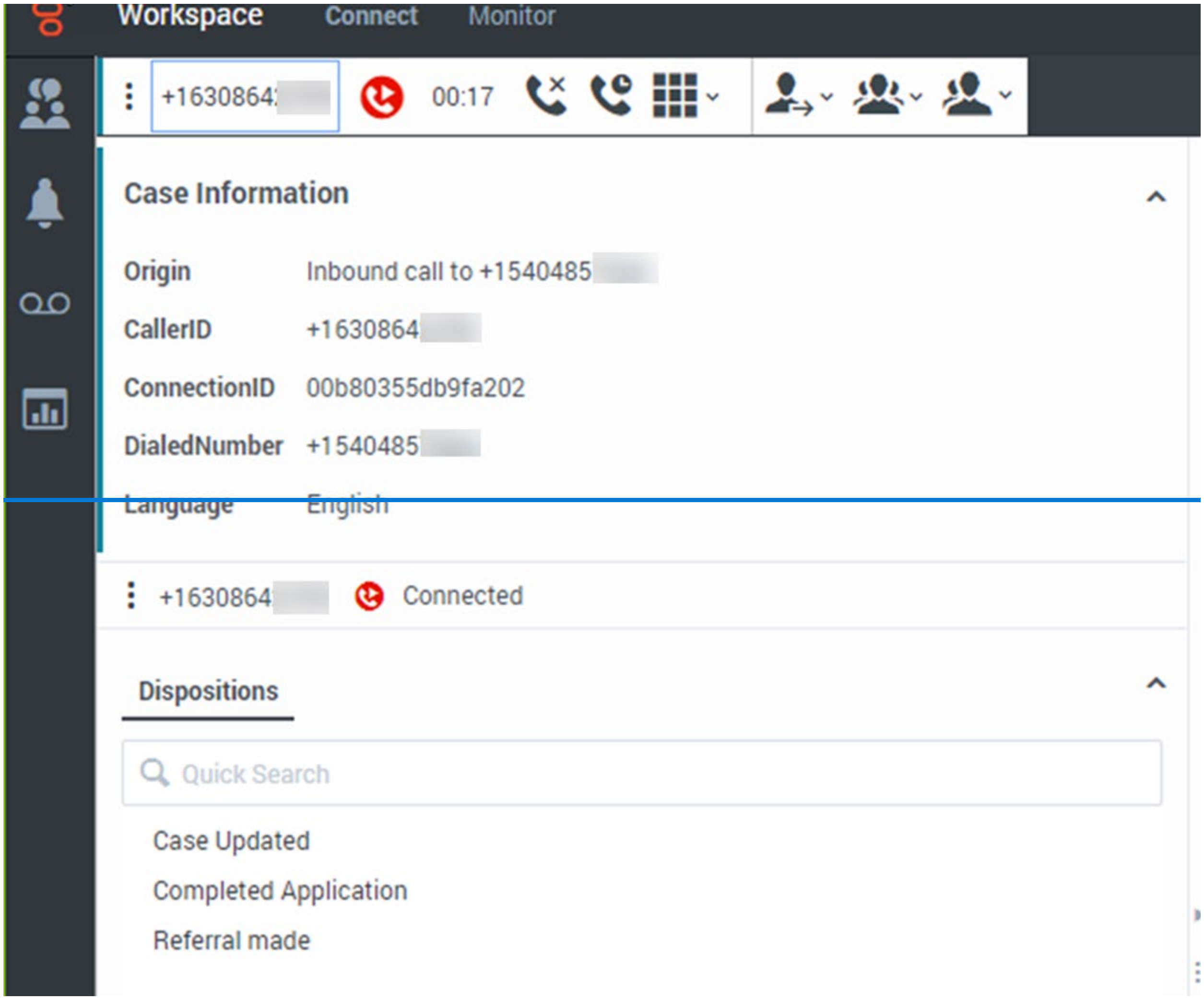
~~The Interaction Bar is displayed under the Connect View and Monitor View tabs.~~

~~Here, agents can:~~

~~**Button**~~		~~**Function**~~
~~Phone Number~~	-	~~View the phone number of the caller.~~
~~Hang up~~		~~End current call.~~
~~Hold~~		~~Put call on hold (See 5.3 Placing a Call on Hold).~~
~~Keypad~~		~~Enter a number as a call prompt. For example, "Press 1 for more options."~~
~~Transfer~~		~~Transfer the call (See 5.4 Transferring a Call).~~
~~Conference~~		~~Conference-in another person, agent, or queue (See 5.4.2 Instant Conference).~~
~~Consultation~~		~~Speak with another person, agent, or queue privately while putting the caller on hold (See 5.4.3 Consult Call).~~

~~Case Information~~

~~The Case Information section displays call information for inbound and outbound calls.~~



~~Information displayed for inbound and outbound calls includes:~~

~~Inbound Calls~~	**~~Outbound Calls~~**
• ~~Origin~~ • ~~Caller ID~~ • ~~ConnectionID~~ • ~~Dialed Number~~ • ~~Language used on calls in this queue~~ • ~~Disposition codes~~	• ~~Origin~~ • ~~Disposition codes~~

~~4 Setting a Status~~

~~(Video instructions available: Setting a Status)~~

~~Set a status to show the system and other agents your availability to receive calls. Select your name to view the list of statuses, then select the appropriate status.~~

~~When on a call, you are in a "Ready" status and do not have to change the status. When done with a call, select any of the "Not Ready" statuses. Each agency sets their own guidelines for statuses, so check with your agency for when to use each status. Set the status back to "Ready" when you are ready to receive calls.~~

~~The statuses may include:~~

- ~~Ready~~
- ~~Not Ready – Case Processing~~
- ~~Not Ready – Extended After Call Work~~
- ~~Not Ready – Last Call~~
- ~~Not Ready – Lunch~~
- ~~Not Ready – Meeting~~
- ~~Not Ready – On Break~~
- ~~Not Ready – Other~~
- ~~Not Ready – Supervising~~
- ~~Not Ready – Technical Issues~~
- ~~Not Ready – Training~~
- ~~Logoff~~

~~You can check the status of another agent by typing their name in the Team Communicator.~~

~~5 Call Handling~~

~~5.1 Receiving a Call (Video instructions available: Receiving a Call)~~

~~5.2 Making a Call (Video instructions available: Making a Call)~~

~~5.3 Placing a Call on Hold (Video instructions available: Placing a Call on Hold)~~

~~5.4 Transferring a Call~~

~~5.4.1 Instant Transfer (Video instructions available: Instant Transfer)~~

~~5.4.2 Instant Conference (Video instructions available: Instant Conference)~~

~~5.4.3 Consult Call (Video instructions available: Consult Call)~~

~~This section describes how to receive a call, make a call, place a call on hold, and transfer a call.~~

~~You can see the disposition code that was entered at the end of each call if input by you or another agent.~~

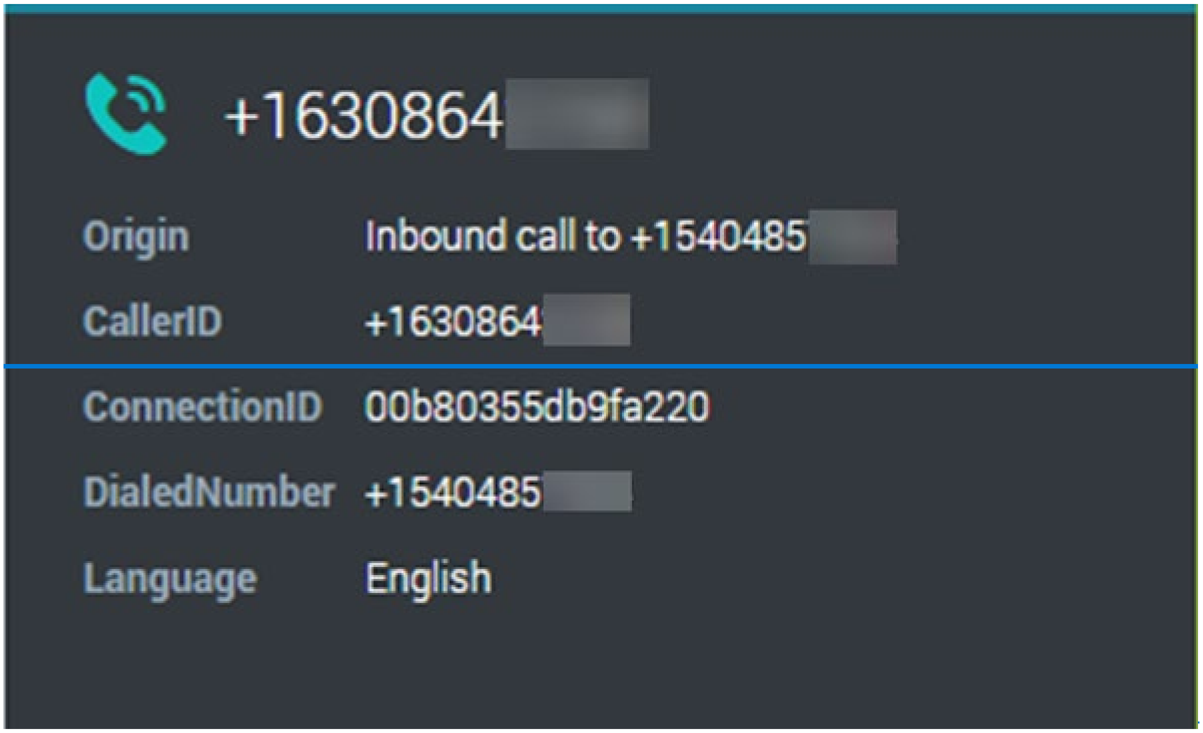
~~5.1 Receiving a Call~~

~~(Video instructions available: Receiving a Call)~~

~~A received call appears as a notification at the bottom right-hand corner of the Genesys window. It is encouraged to answer the call on your phone rather than Genesys. You can only receive a call if your status is listed as "Ready."~~

~~**Notification of Call**~~

~~A call notification appears at the bottom right-hand corner of the Genesys window to show an incoming call.~~



~~The call notification includes:~~

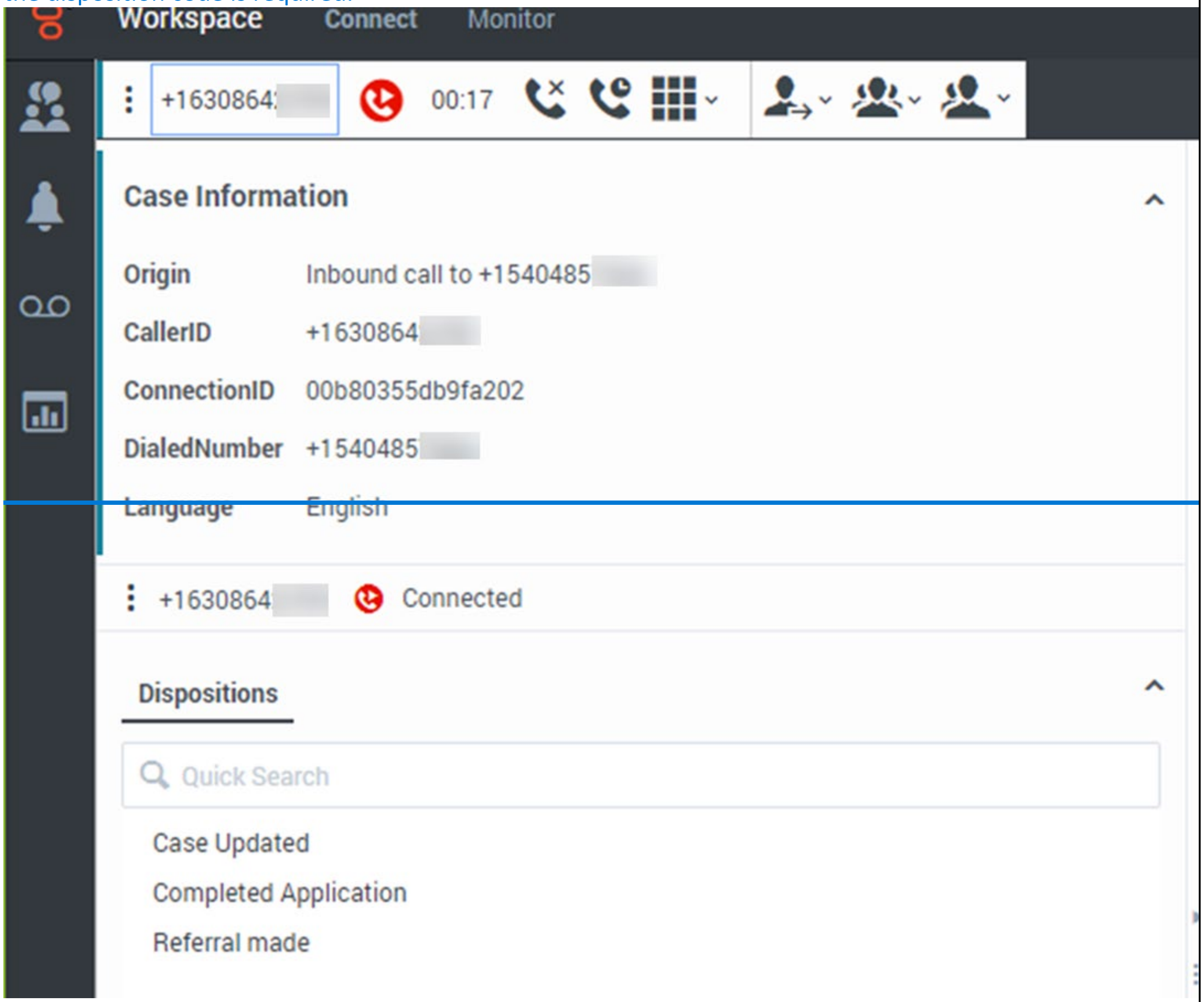
- ~~Name or number of the caller~~
- ~~Origin of the call~~
- ~~Caller ID~~
- ~~Connection ID~~
- ~~Dialed number~~
- ~~Language and skill you are currently in~~

~~Answering the Call~~

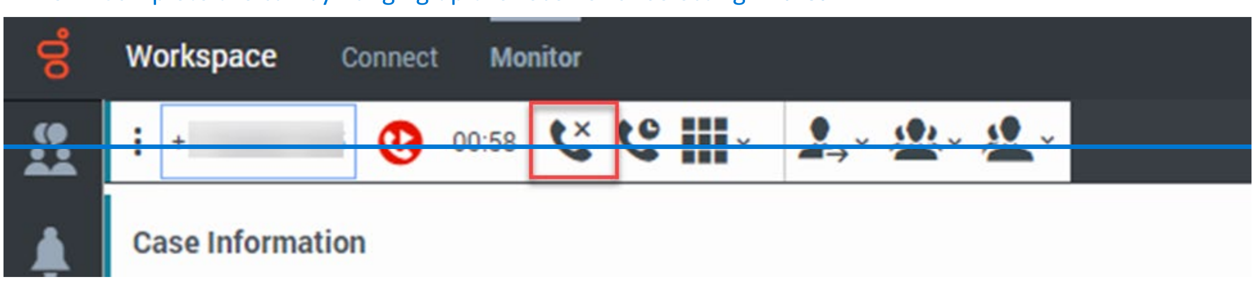
~~There is often a short pause between when the call is shown on the desktop and when your phone rings.~~

1. ~~Answer the call using the phone connected to your Genesys account. Once a call has been answered, the case information (call information) of the caller displays (listed above).~~

2. ~~Enter a disposition code at the end of the call if required by your agency. Check with your agency if the disposition code is required.~~



3. ~~Complete the call by hanging up the receiver or selecting **End Call**.~~



~~After ending a call, agents are placed into an after call work status for 20 seconds by default. If more time is needed to wrap up the call, you can select another appropriate "Not Ready" status. When ready for another call, change your status to "Ready."~~

~~5.2 Making a Call~~

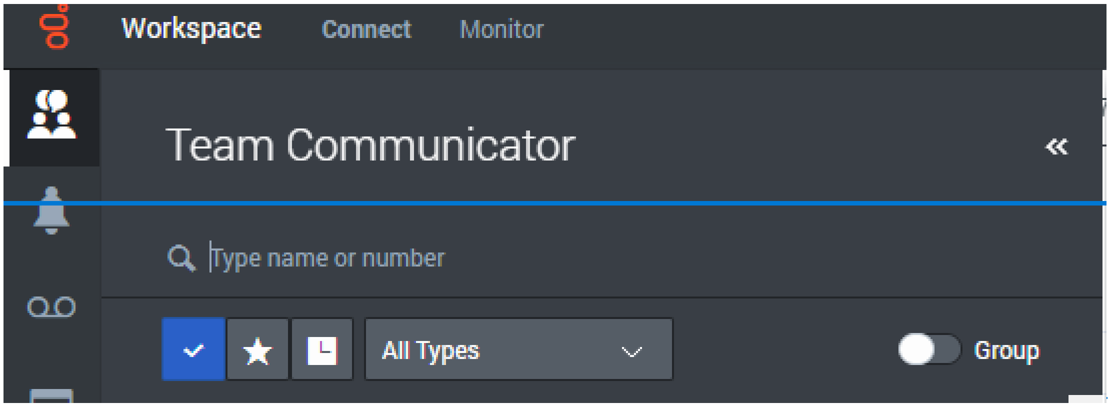
~~(Video instructions available: Making a Call)~~

~~Genesys allows agents to make outgoing calls which is also known as dialing out. Outgoing calls can be done when the agent is in the “Ready” or “Not Ready” status.~~

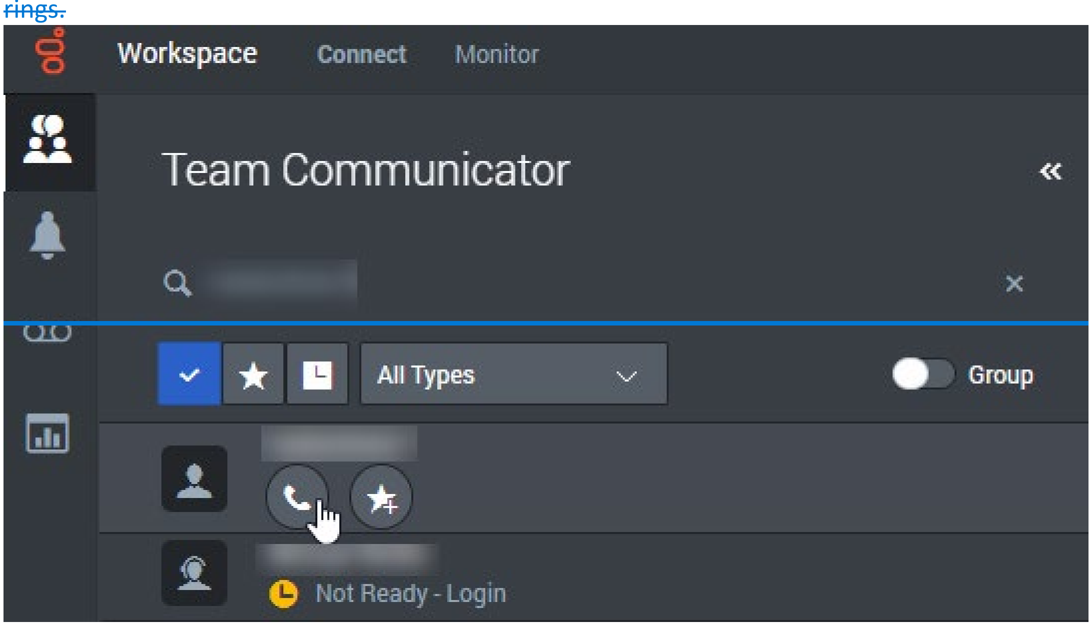
~~When making a call, your status shows as busy to other agents and your supervisor and other calls cannot be received.~~

~~To make a call:~~

1. ~~Select **Team Communicator** and enter the name or phone number. Dashes are not needed. Do not include the "1" before the area code.~~

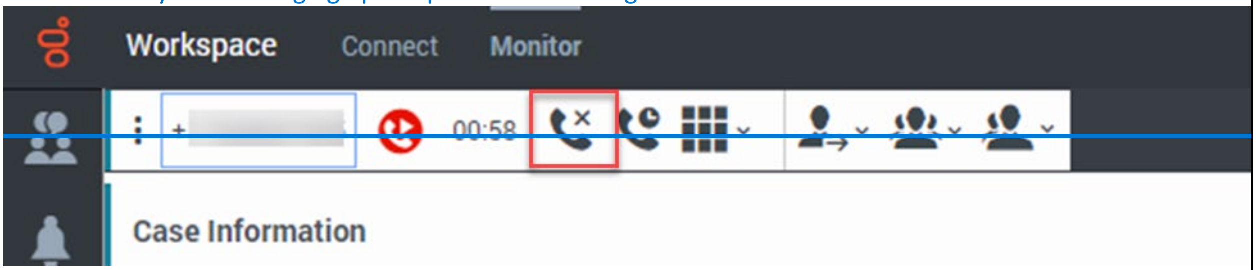


2. ~~Select the **Phone** icon or press **Enter** after typing the phone number. After a short pause, your phone rings.~~



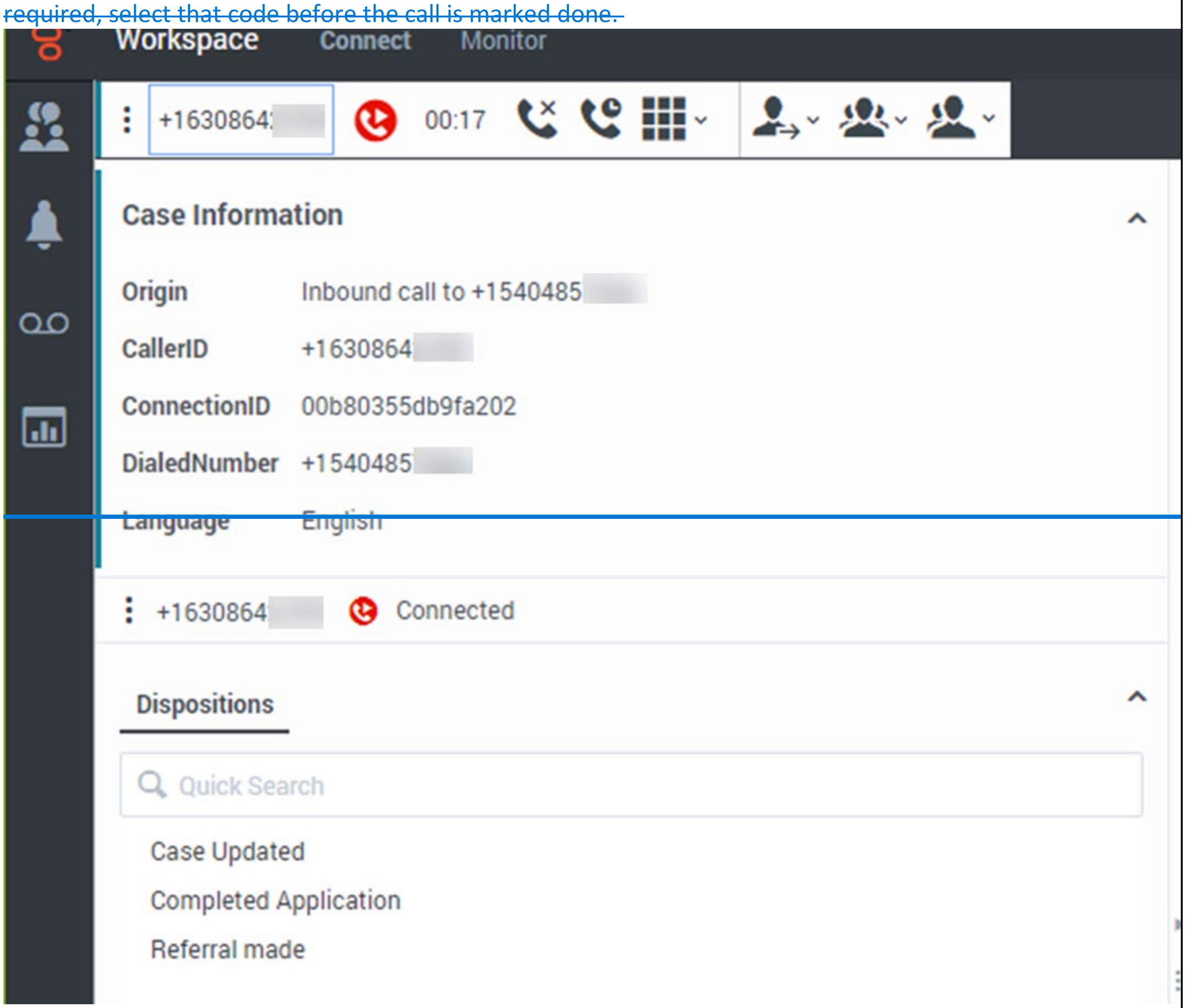
3. ~~Pick up the phone for the call to go out. The number that displays to the recipient is the agency's phone number.~~

4. ~~End the call by either hanging up the phone or selecting **End Call**.~~



~~Once the call is complete, your status changes back to the status before the outgoing call.~~

5. ~~Enter a disposition code at the end of a call if required by your agency. If a disposition code is required, select that code before the call is marked done.~~

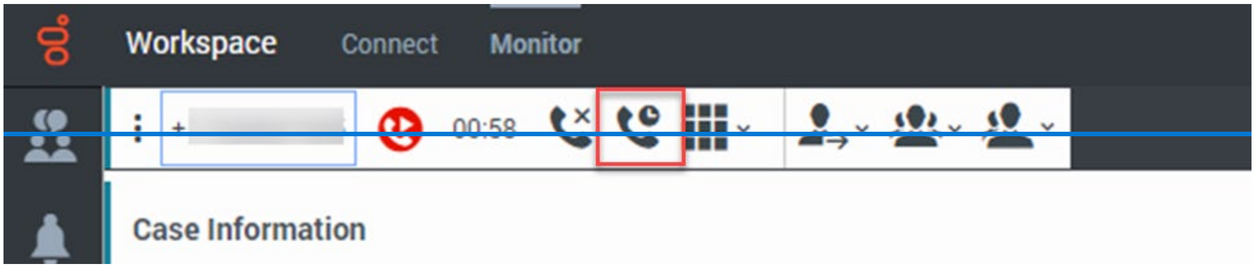


~~5.3 Placing a Call on Hold~~

~~(Video instructions available: Placing a Call on Hold)~~

~~To place a call on hold:~~

1. ~~Select **Hold the Call** in the interaction toolbar. The caller hears music when they are on hold.~~



~~2. Select **Hold the Call** again to take the caller off hold and resume the call.~~

~~5.4 Transferring a Call~~

~~5.4.1 Instant Transfer~~

~~5.4.2 Instant Conference~~

~~5.4.3 Consult Call~~

~~There are three types of call transfers in Genesys: Instant Transfer, Instant Conference, and Consult Call.~~

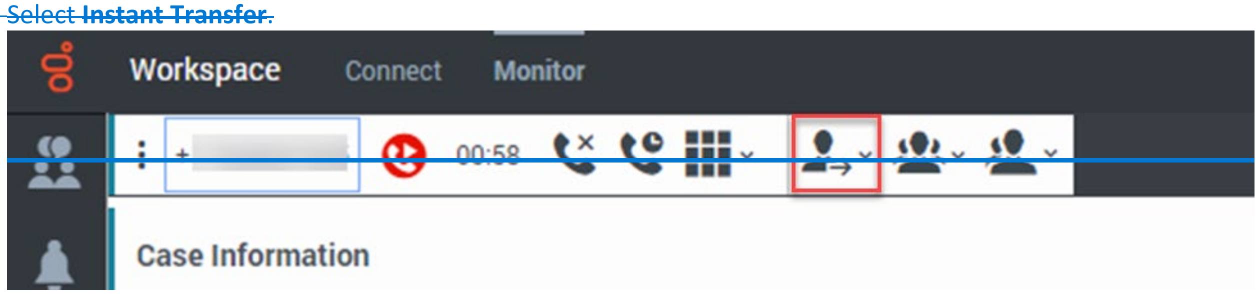
~~5.4.1 Instant Transfer~~

~~(Video instructions available: Instant Transfer)~~

~~An instant transfer sends the call to another agent without the first agent speaking to the other agent. This is also known as a cold transfer. This transfer should be used when a caller knows where their call needs to be routed or if the first agent receives the call on accident and sends the call to the right department.~~

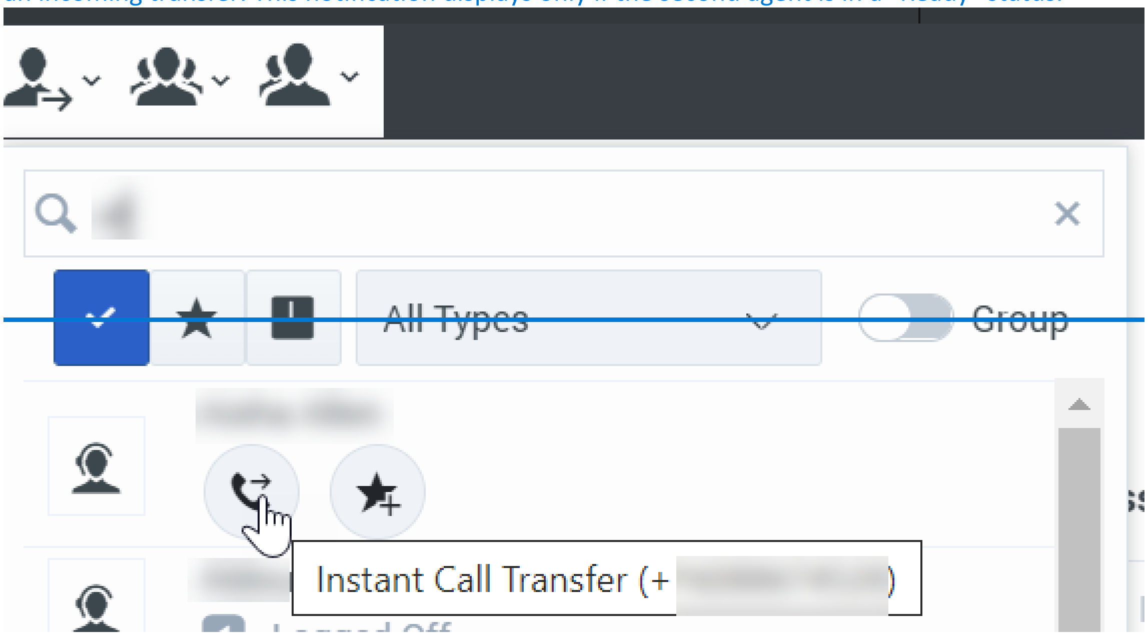
~~To do an instant transfer:~~

~~1. Select **Instant Transfer**.~~



~~2. Enter the 10-digit phone number or type the name of the second agent in the drop-down menu. To transfer to a queue, talk to your supervisor.~~

3. ~~Select the **Phone** icon under their name, and the other agent receives a notification that they have an incoming transfer. This notification displays only if the second agent is in a "Ready" status.~~



4. ~~The other agent can accept or decline the transfer. Once accepted, the call transfers directly to the second agent.~~

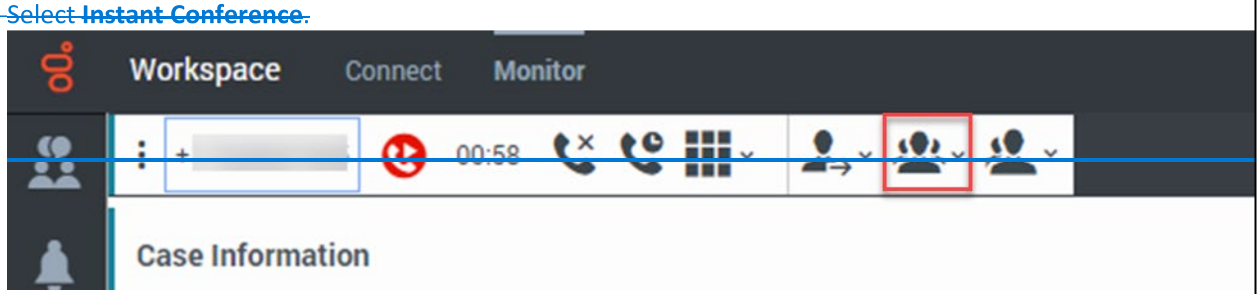
~~5.4.2 Instant Conference~~

~~(Video instructions available: Instant Conference)~~

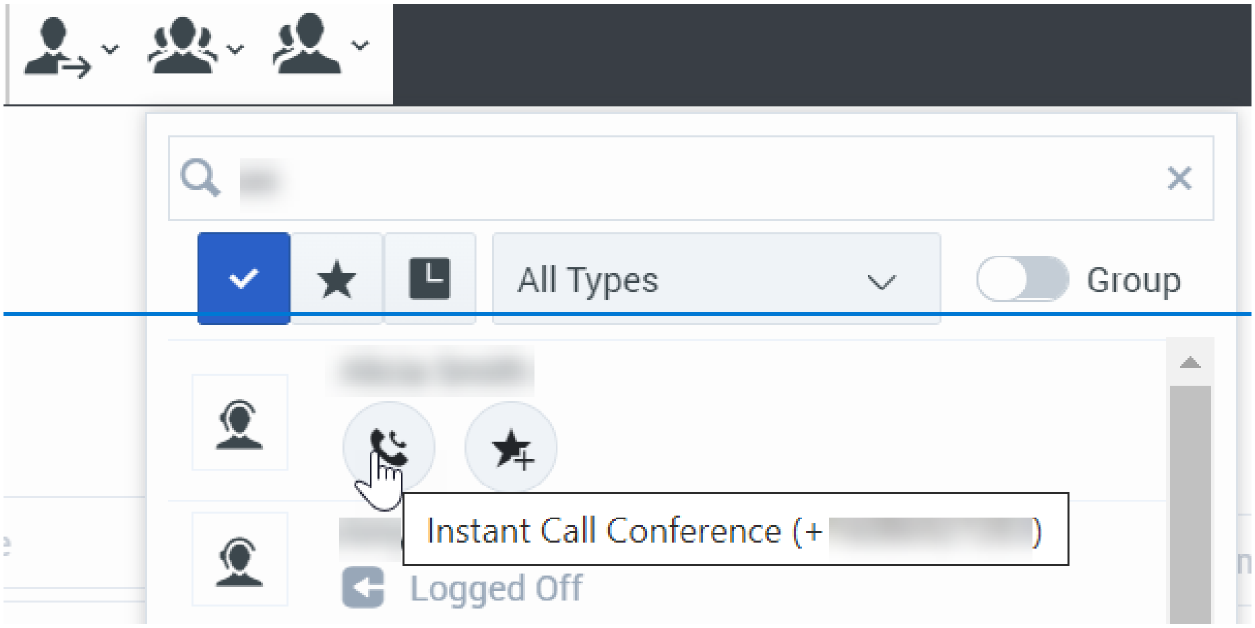
~~An instant conference is when a second agent is added by the first agent to a call.~~

~~To do an instant conference:~~

1. ~~Select **Instant Conference**.~~



2. ~~Type the name of the second agent in the drop-down menu.~~
3. ~~Select the **Phone** icon under their name, and they receive a notification they have an incoming transfer.~~



~~This notification is only received if the second agent is in a "Ready" status.~~

4. ~~The other agent can accept or decline the transfer. Once accepted, the call includes all three people.~~

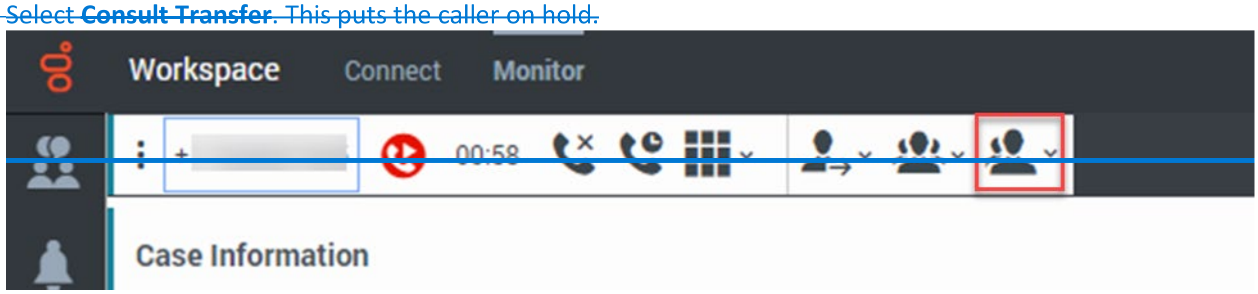
~~5.4.3 Consult Call~~

~~(Video instructions available: Consult Call)~~

~~A consult call, also known as a warm transfer, is when the first agent calls the second agent while they are on the line with the caller. The caller is placed on hold and cannot hear the conversation between the two agents. The first agent can use this transfer to give the second agent context about the call before transferring it to the second agent.~~

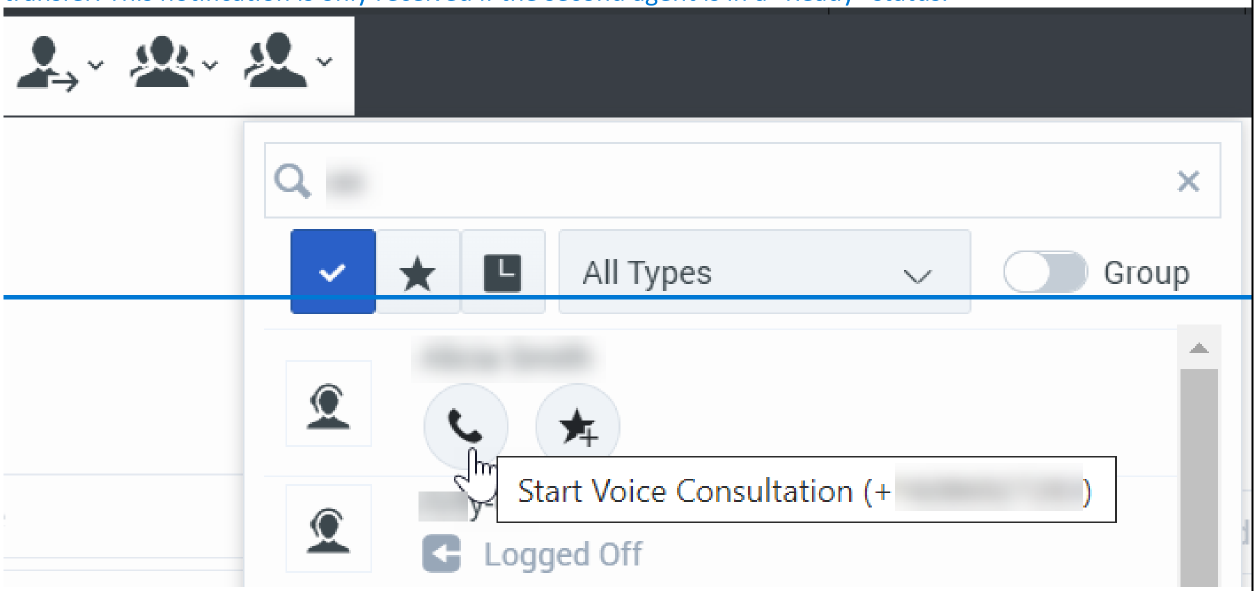
~~To do a consult call:~~

1. ~~Select **Consult Transfer**. This puts the caller on hold.~~

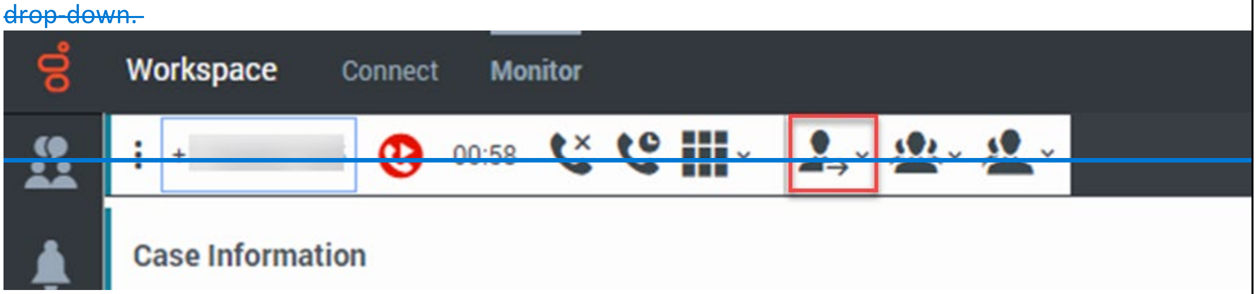


2. ~~Type the 10-digit phone number or name of the second agent in the drop-down menu.~~

3. ~~Select the **Phone** icon under their name, and they receive a notification they have an incoming transfer. This notification is only received if the second agent is in a "Ready" status.~~



4. ~~Once accepted, you can speak with the second agent. The caller remains on hold and is unable to hear your conversation with the second agent.~~
    1. ~~Once the second agent accepts the consult, the second agent's information will populate at the bottom of the screen, which also houses the Consultation section that contains hold and other icons.~~
    2. ~~If you want to go back and speak with the caller, select the top **Hold** icon to put the second agent on hold.~~
    3. ~~To go back to the second agent, select the bottom **Hold** icon in the Consultation section. This puts the caller on hold and allows you to speak to the second agent.~~
5. ~~Select **Instant Transfer** and the call transfers to the second agent. If including an interpreter, select Instant Conference instead (See 5.4.2 Instant Conference). The second agent's name displays in the drop-down.~~



~~6 Voicemail~~

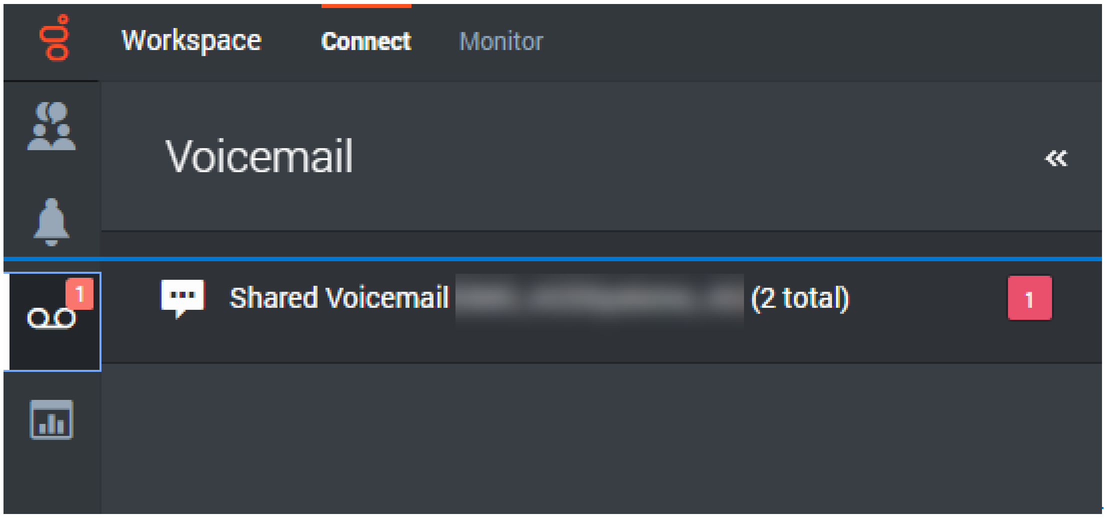
~~6.1 Retrieving and Deleting a Voicemail (Video instructions available: Retrieving and Deleting a Voicemail)~~

~~This section provides an overview of how to retrieve and delete voicemails. Discuss your agency's specific voicemail handling processes with your supervisor, as each agency has a different process.~~

~~6.1 Retrieving and Deleting a Voicemail~~

~~(Video instructions available: [Retrieving and Deleting a Voicemail])~~

~~An agent can access the voicemail on the Side-Bar by selecting the **Voicemail** icon, which is located under the Notifications icon. For new or unheard voicemails, a red number displays on the icon indicating a voicemail is available.~~



~~To retrieve a voicemail:~~

1. ~~Select the voicemail icon, and the call queue(s) display in the popup window.~~
2. ~~Select the queue with the new voicemail to access it.~~
3. ~~Answer your phone to listen to the voicemail.~~

~~The notification goes away after listening to the voicemail. Delete the voicemail by following the prompts given or by leaving the voicemail for your supervisor to delete later, depending on your agency's process.~~

~~**Note:**~~	~~Anyone with access to the queue can see or listen to the voicemails in that queue.~~

~~7 Supervisors~~

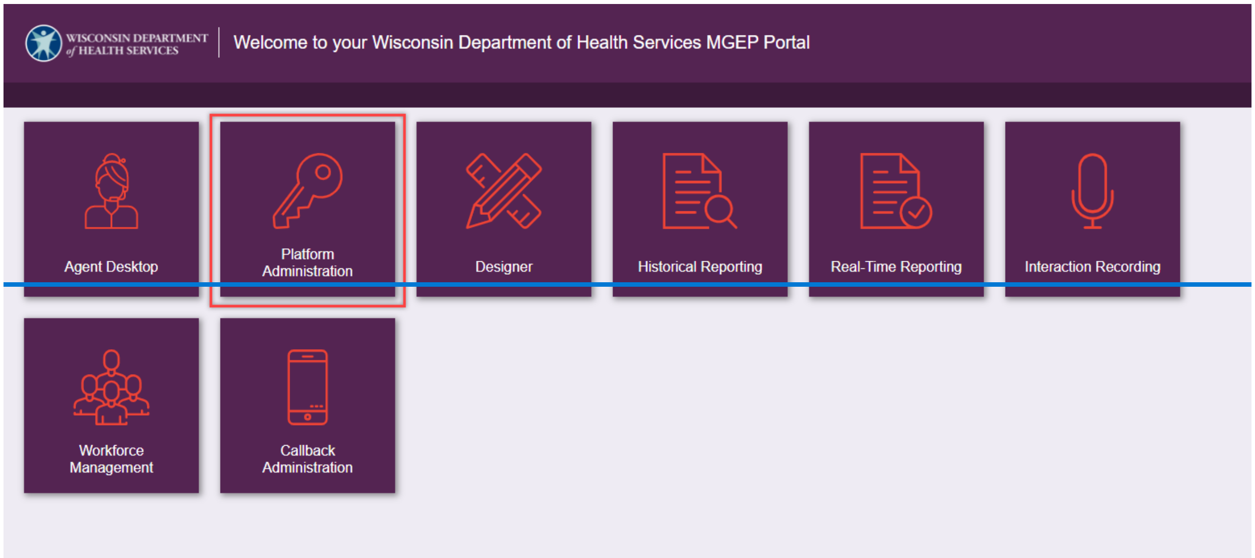
~~7.1. Call Supervision~~

~~7.2 Quality Management~~

~~Genesys provides multiple screens and functions to support supervisors in their tasks. In addition to taking calls, supervisors can:~~

- ~~Supervise calls~~
- ~~Review and manage for quality~~
- ~~View and customize reports (coming soon)~~

~~The Internal ID is only used for accessing Interaction Recording and Platform Administration. This password is set by first logging in to Platform Administration from the Genesys Portal.~~



~~7.1 Call Supervision~~

~~7.1.1 Logging in to Supervise Calls~~

~~7.1.2 Monitoring~~

~~7.1.3 Barging~~

~~7.1.4 Coaching~~

~~7.1.5 Logging an Agent Off (Video instructions available: Logging an Agent Off)~~

~~There are three different methods to listen to live calls in Genesys:~~

~~**Method**~~	~~**Definition**~~
~~Monitoring~~	~~Neither the agent nor the caller can hear the supervisor~~
~~Barging~~	~~Both the caller and the agent can hear the supervisor~~
~~Coaching~~	~~Only the agent can hear the supervisor~~

~~The Monitor Tab has information relating to call supervision. It is separated into two tabs:~~

~~**Tab**~~	~~**Function**~~
~~Dashboard~~	• ~~Includes real-time statistics such as the average wait time and how many calls are currently in queue~~ • ~~Allows supervisor to monitor the number of agents in queue~~
~~My Agents~~	• ~~Displays the agents assigned to the supervisor and their current status~~

~~It is recommended supervisors use the Real-Time Reporting or "Pulse" application to monitor queues and agents. The Real-Time Reporting application can be customized by a supervisor to display all desired statistics, whereas the agent desktop cannot.~~

~~7.1.1 Logging in to Supervise Calls~~

~~The login process to supervise calls is the same process as logging in as an agent (see Section 2.1 Logging on to Agent Desktop).~~

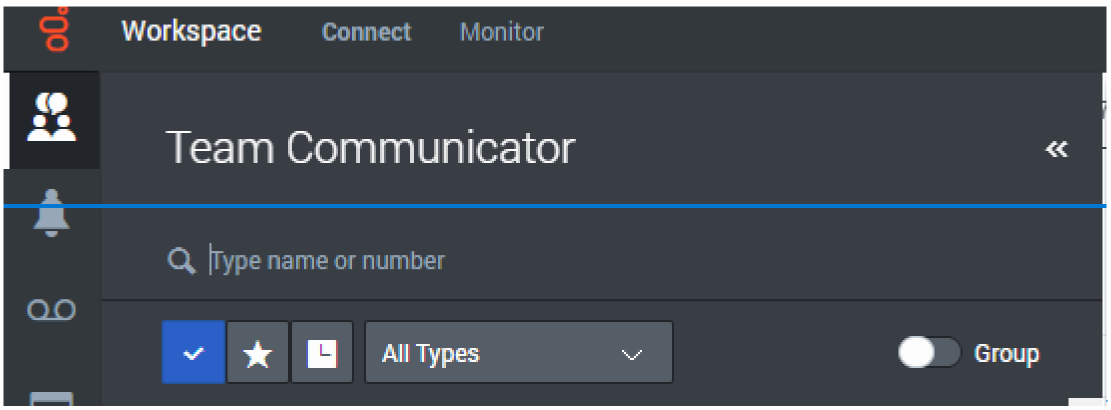
~~7.1.2 Monitoring~~

~~(Video instructions available: Monitoring)~~

~~Monitoring is when a supervisor listens to a call and neither the agent nor the caller can hear them. The agent does not receive a notification that they are being monitored.~~

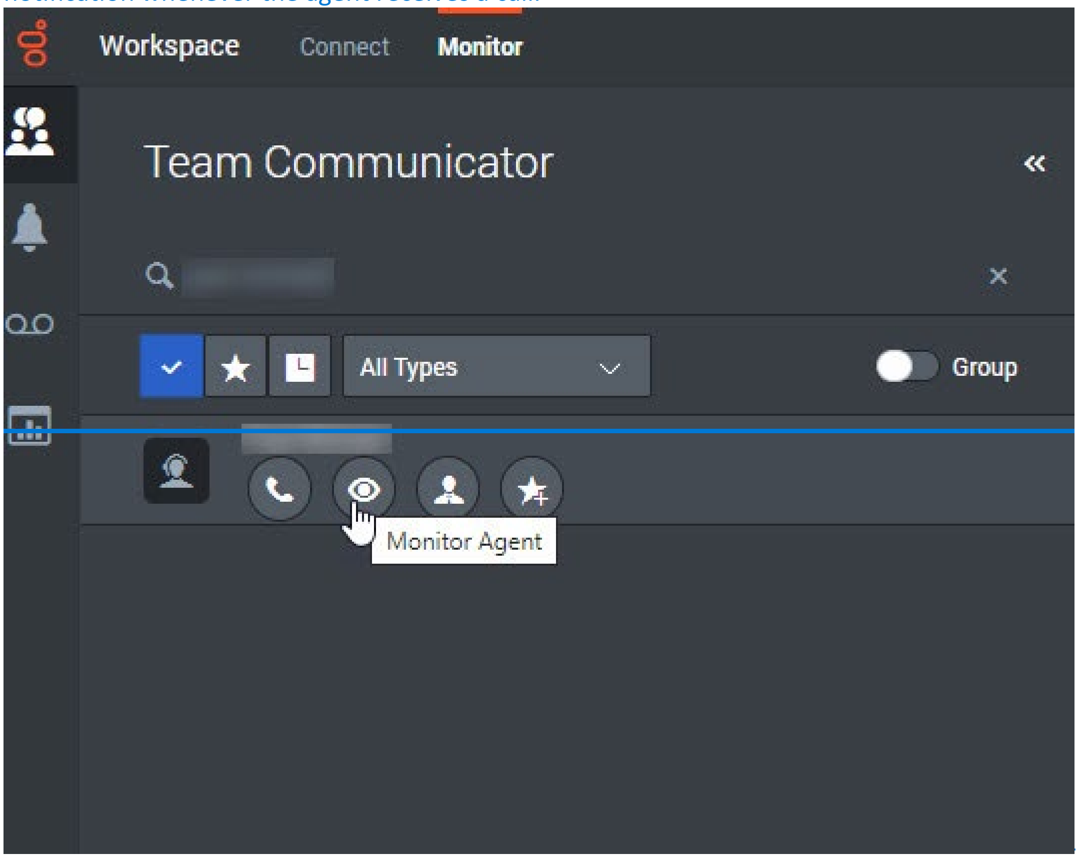
~~To monitor a call:~~

1. ~~Select the **Team Communicator** icon in the Side-Bar.~~



2. ~~Search the agent's name and hover the cursor over their name. The supervisor can select the group option, then select a group of agents, and monitor those agents individually.~~

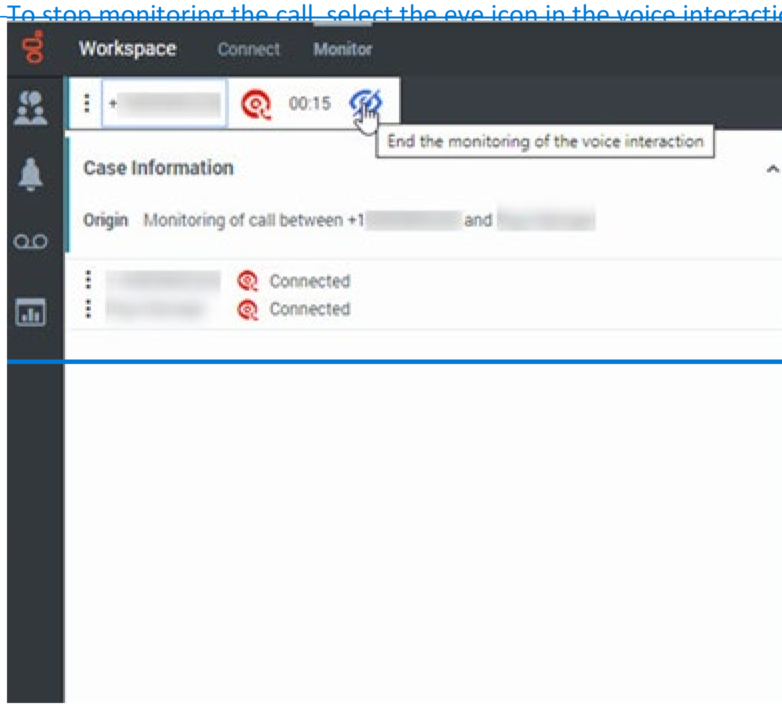
~~3. Select the eye icon to monitor the agent. While this icon is selected, the supervisor receives a notification whenever the agent receives a call.~~



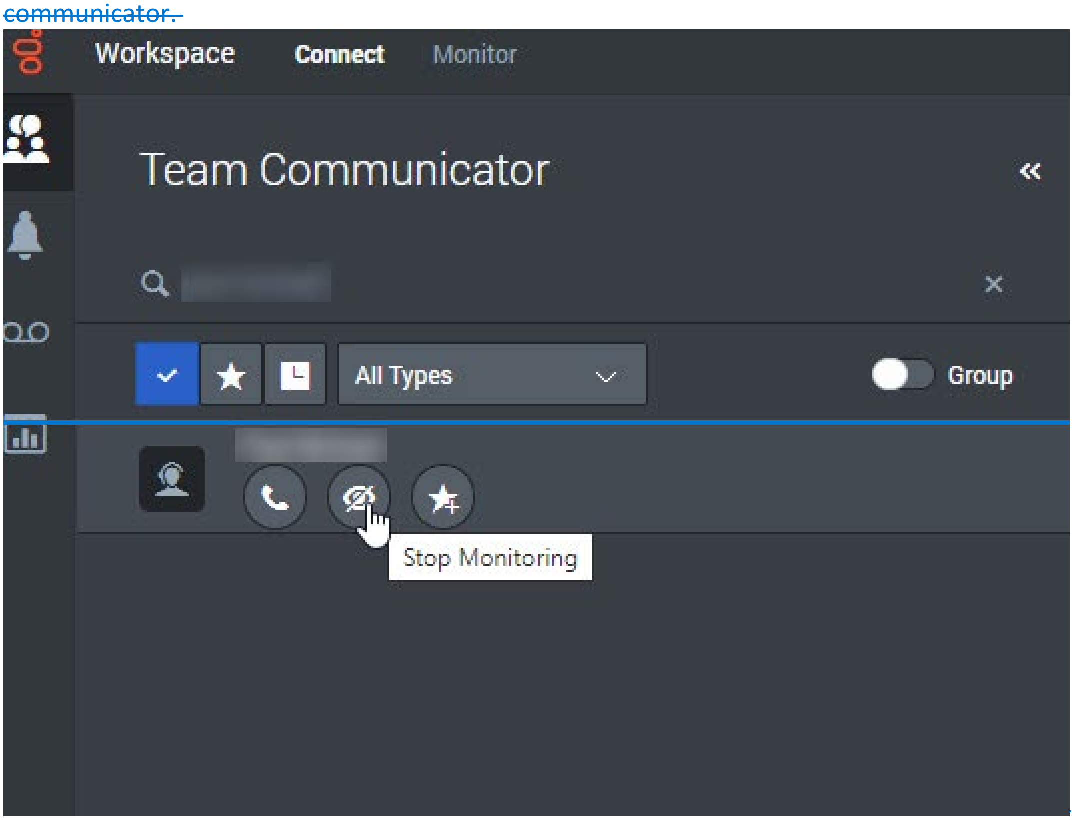
~~4. When the agent receives a call, the supervisor also receives a call. Accept the call to begin monitoring the agent. If the supervisor doesn't accept the call, the notification disappears.~~

~~**Note:**~~	~~If the notification disappears, select **Stop Monitoring** then select **Monitor Agent**, which then redisplays the notification.~~

~~5. To stop monitoring the call, select the eye icon in the voice interaction window.~~



~~6. To stop monitoring the agent, select the eye icon under that agent's name in the team communicator.~~



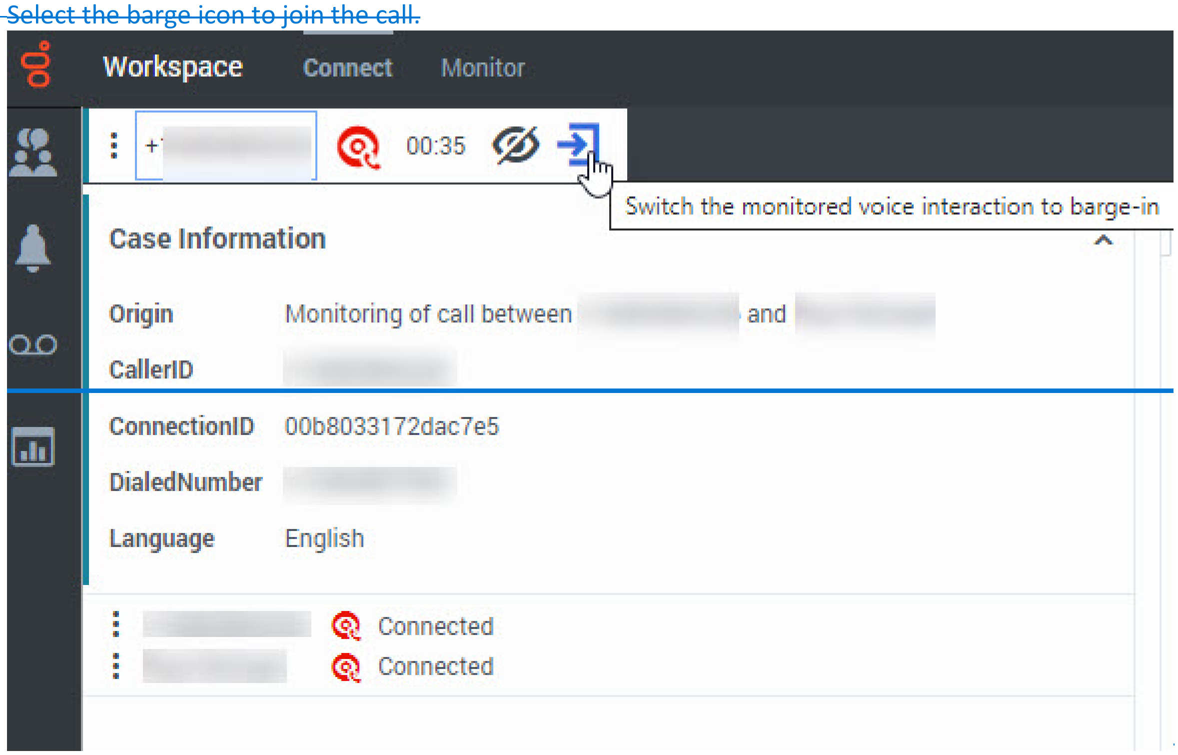
~~7.1.3 Barging~~

~~(Video instructions available: Barging)~~

~~Barging is when a supervisor joins the call so that both the agent and the caller can hear them. Some examples include when the call is being monitored and it requires deescalation, or if the caller requests to speak with a supervisor. Barging can only occur when the agent is already being monitored. The supervisor can barge while monitoring, but not when they are coaching.~~

~~To use barge and join a call:~~

1. ~~Start monitoring the agent (see Section 7.1.2 Monitoring).~~
2. ~~Select the barge icon to join the call.~~



3. ~~To leave the call, hang up or select the eye icon.~~

~~When the supervisor leaves, the call continues between the agent and caller.~~

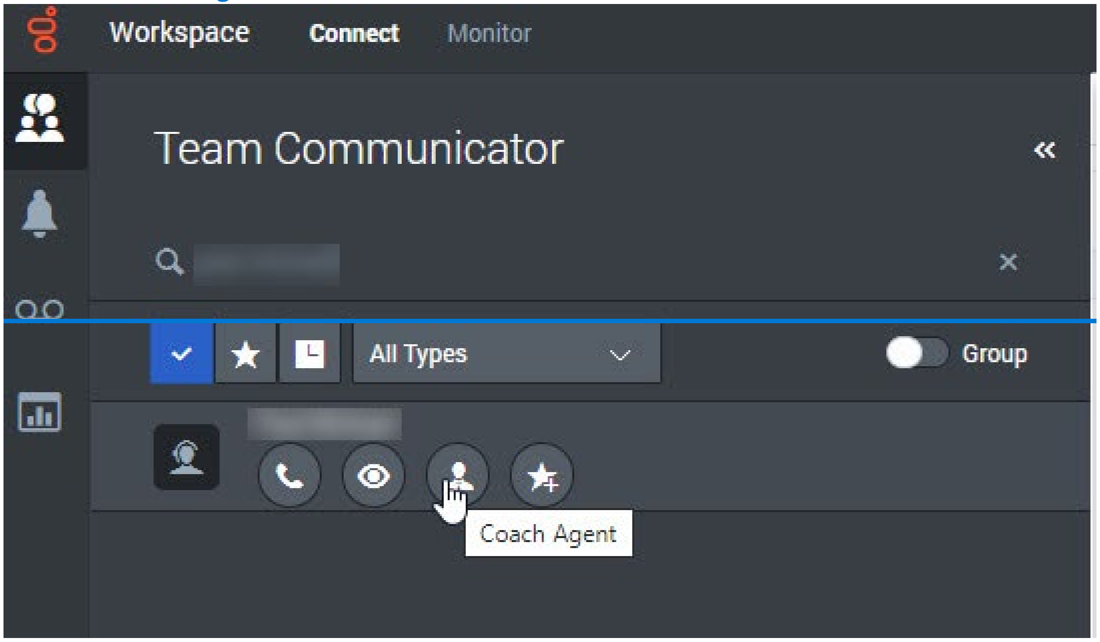
~~7.1.4 Coaching~~

~~(Video instructions available: Coaching)~~

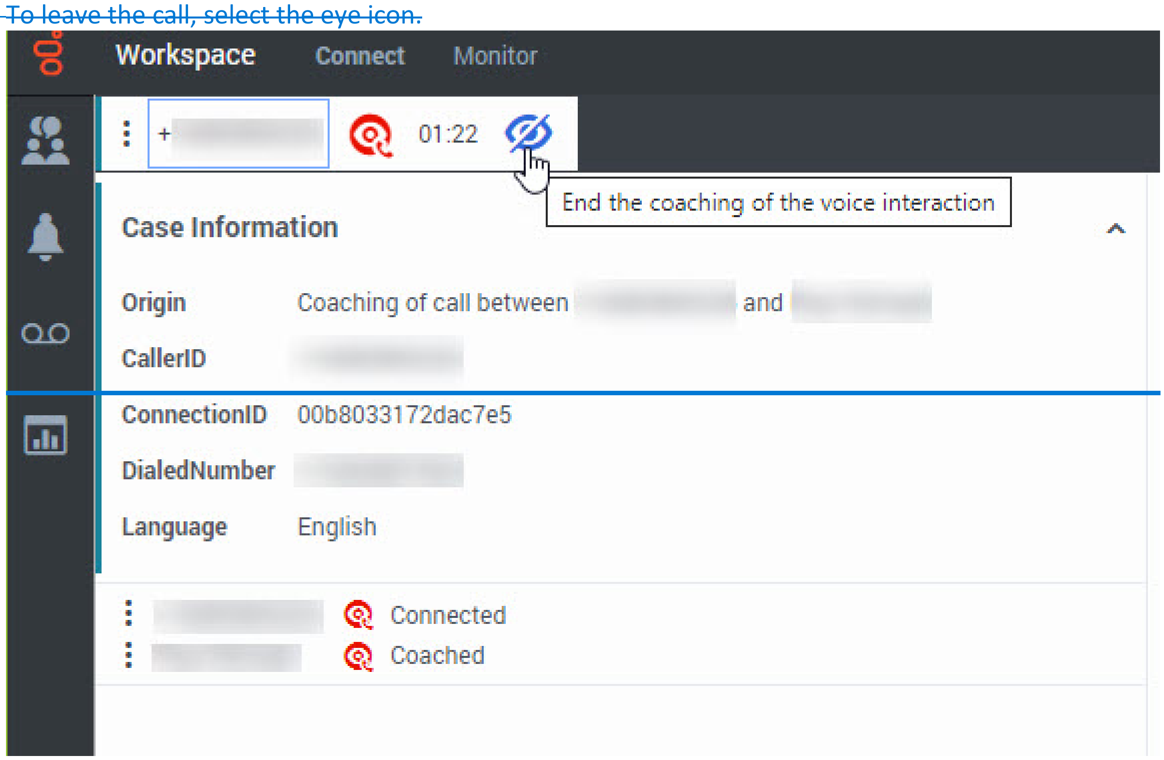
~~Coaching is when the supervisor speaks to the agent during the call, but the caller can't hear the supervisor. Some examples include when an agent is new or when an agent needs assistance on a call. The agent sees the supervisor as one of the parties in the call if they are being coached.~~

~~To coach an agent on a call:~~

1. ~~Select the **Coach Agent** icon.~~



2. ~~While this icon is selected, the supervisor receives a notification when the agent receives a call.~~
3. ~~When the agent receives a call, the supervisor also answers the call to coach. The supervisor can coach an agent whose call is in progress.~~
4. ~~To leave the call, select the eye icon.~~



~~When the supervisor leaves, the call continues between the agent and the caller.~~

~~7.1.5 Logging an Agent Off~~

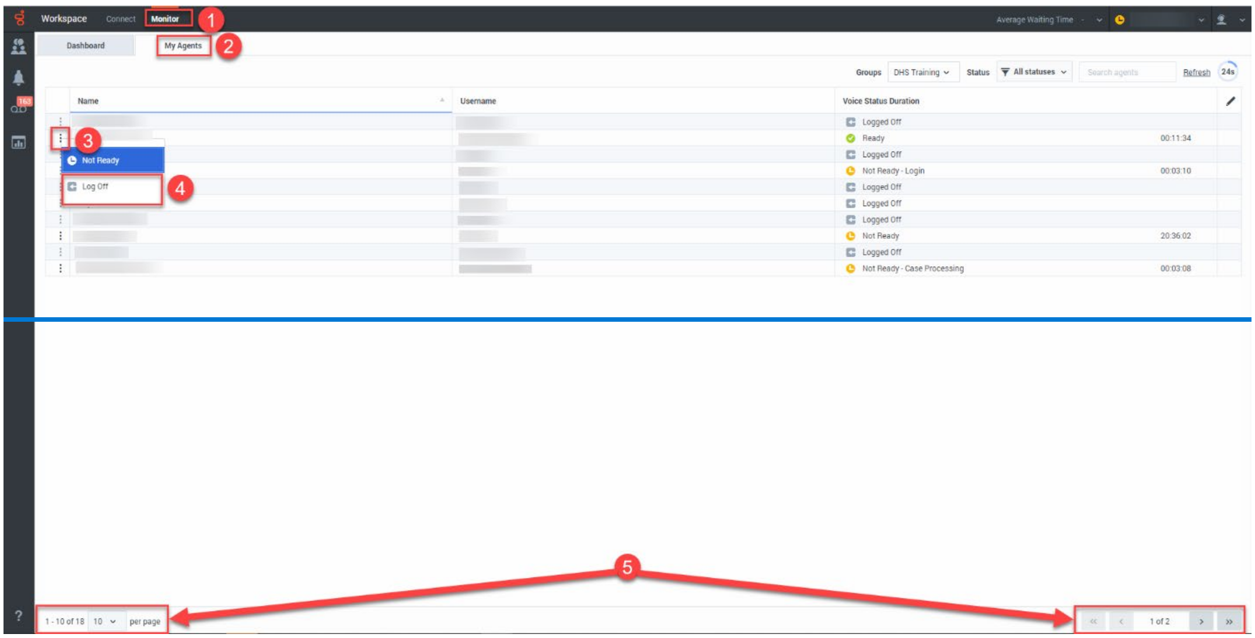
~~(Video instructions available: Logging an Agent Off)~~

~~The log off agent feature is useful if it's discovered an agent has forgotten to log off.~~

~~The Supervisor must be logged on to Workspace and is assigned as a Supervisor for the specific agent or agent group.~~

~~To log an agent off:~~

1. ~~From the Agent Desktop click the Monitor view tab.~~
2. ~~Click My Agents tab.~~
3. ~~Click the three dots next to the name of the agent to be logged off.~~
4. ~~Select **Log Off** from the drop down.~~
5. ~~If the agent is not showing, use the features at the bottom of the page to change the display.~~



~~7.2 Quality Management~~

~~7.2.1 Logging in for Quality Management~~

~~7.2.2 Explore Tab: Searching for and Listening to Calls (Video instructions available: Searching for Calls, Sorting Results and Listening to Calls, Saving Searches)~~

~~7.2.3 Telephonic Signature Recording Missing in ECF~~

~~Supervisors can listen to recorded calls by agents to determine if agents have handled the calls properly per policy and agency guidelines. Agent evaluations help find training needs of agents and areas of improvement for the agency.~~

~~Supervisors can save recordings locally. Recordings can also be accessed and listened to in Interaction Recording. It may take up to four hours for a call to be available in Interaction Recording. Genesys records 100% of the calls made and are held on the platform for 30 days.~~

~~Supervisors can search for recordings using the Explore Tab in the Interaction Recording section (see Section 7.2.2 Explore Tab: Searching for and Listening to Calls).~~

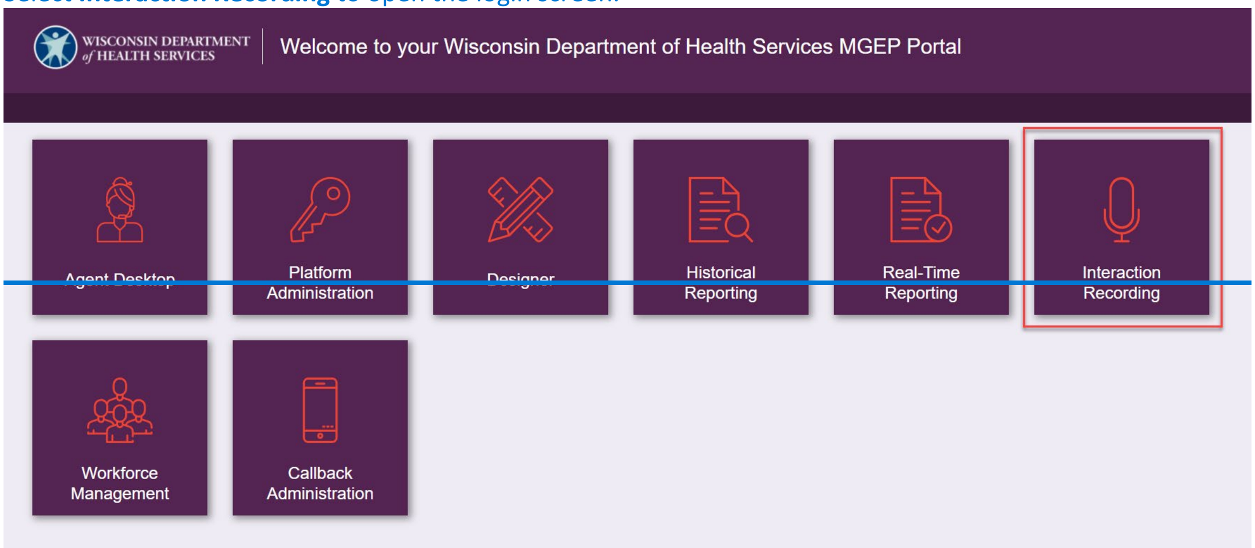
~~7.2.1 Logging in for Quality Management~~

~~(Video instructions available: Logging in for Quality Management)~~

~~Quality management tasks take place in Interaction Recording.~~

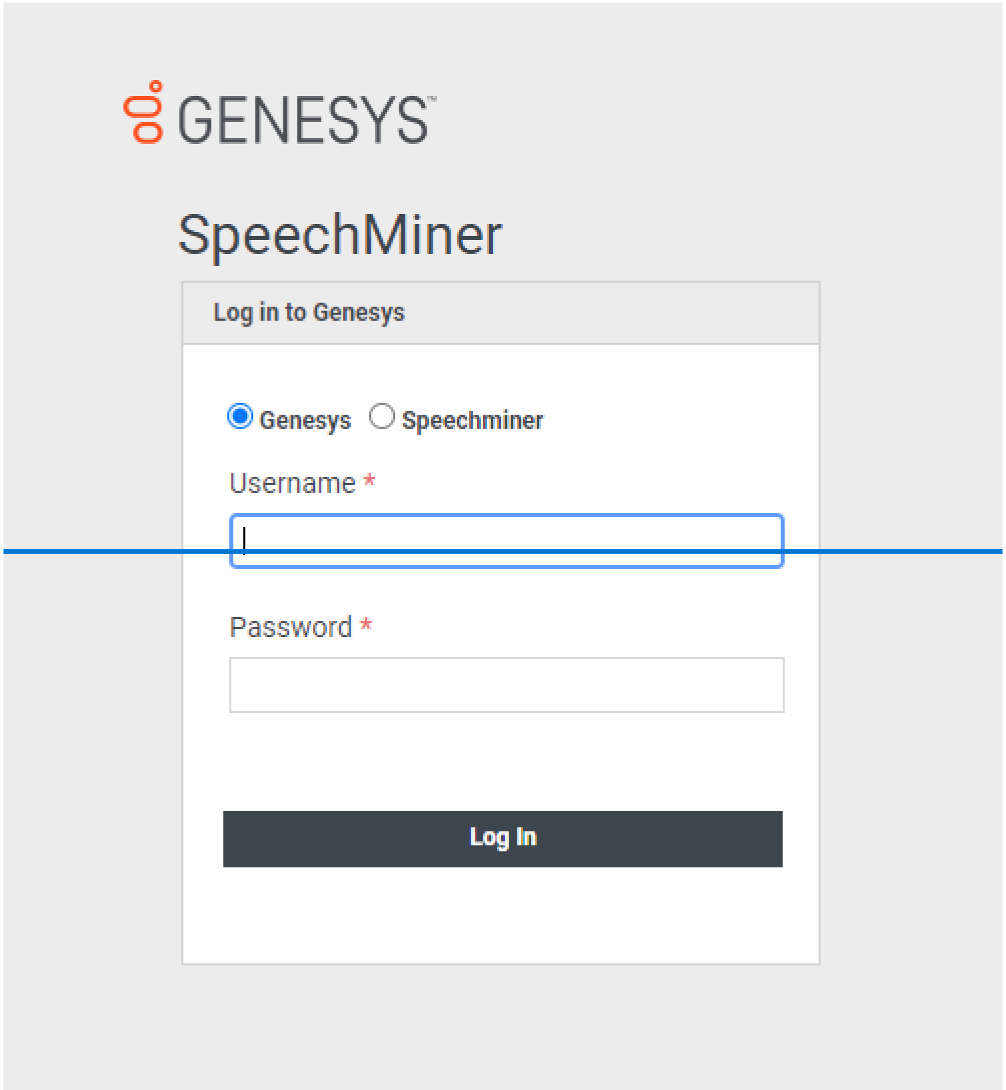
~~To log in and begin quality management:~~

1. ~~Open the Genesys Portal with Firefox, Edge, or Chrome.~~
2. ~~Select **Interaction Recording** to open the login screen.~~



3. ~~Enter your case sensitive local ID and local password, and make sure the Genesys button is selected. The local ID is the same as your WAMS ID.~~

~~**Note:**~~	~~The local password is set up on initial login to Genesys (see Section 10.1 Setting a Local Password).~~



~~4.~~

~~7.2.2 Explore Tab: Searching for and Listening to Calls~~

~~7.2.2.1 Searching for Calls (Video instructions available: Searching for Calls)~~

~~7.2.2.2 Sorting Results and Listening to Calls (Video instructions available: Sorting Results and Listening to Calls)~~

~~7.2.2.3 Saving Searches (Video instructions available: Saving Searches)~~

~~The Explore Tab allows a supervisor to search for and listen to calls. Specific searches can be saved and re-run in the future.~~

~~7.2.2.1 Searching for Calls~~

1. ~~Search by Date~~
2. ~~Search by Agent Name~~
3. ~~Search by Call Type~~
4. ~~Search by Caller Phone Number~~

~~5. Search by ConnectionID~~

~~6. Search by Number of Segments~~

~~7. Search by Call Duration~~

~~(Video instructions available: Searching for Calls)~~

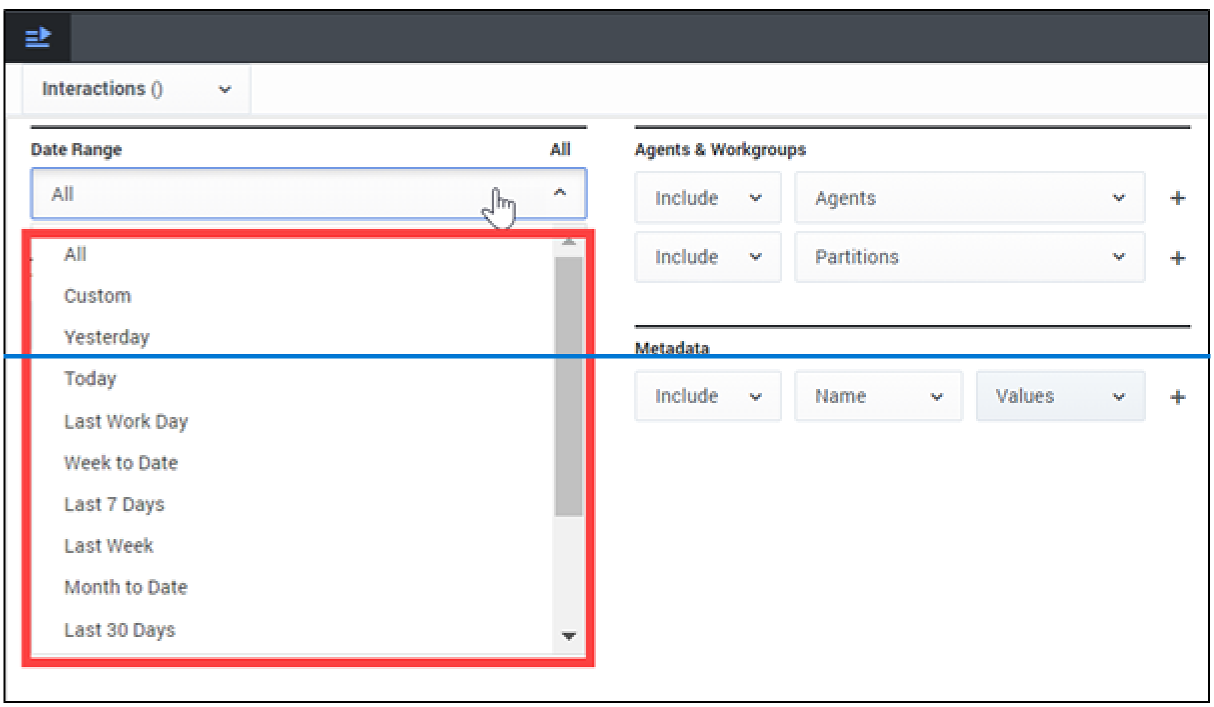
~~There are several ways to search for a call from the Explore tab including:~~

- ~~Date~~
- ~~Agent name~~
- ~~Consortia~~
- ~~Call type (inbound or outbound)~~
- ~~Phone number of the caller~~
- ~~ConnectionID~~
- ~~Number of segments~~
- ~~Call duration~~

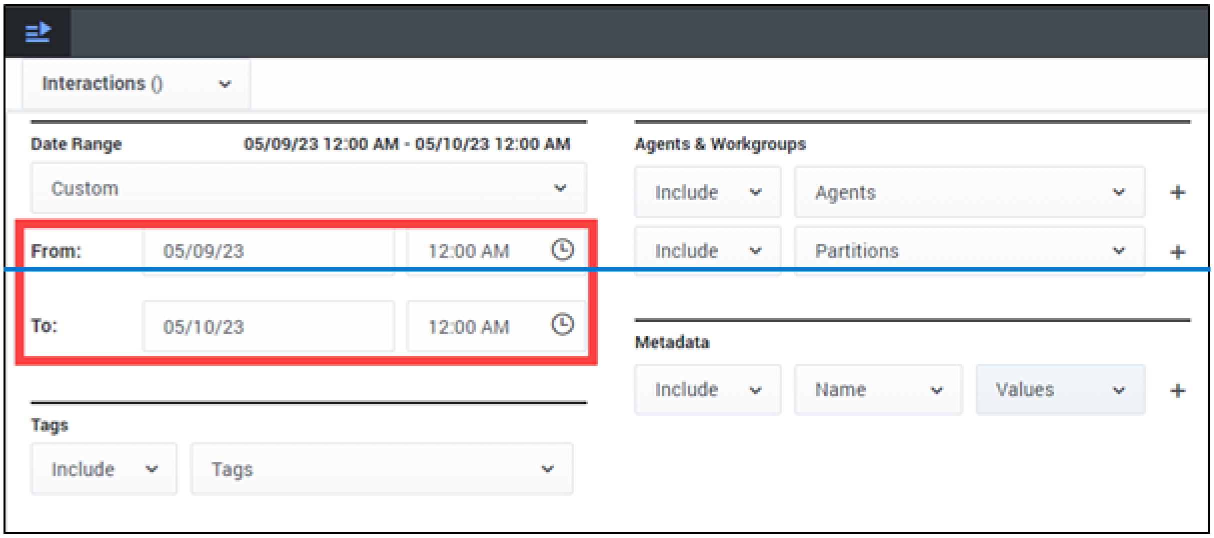
~~Select **Reset** at any time to clear all the search criteria.~~

~~**Search by Date**~~

~~To search by date, select a **date range** from the drop-down menu menu in the Date Range section.~~

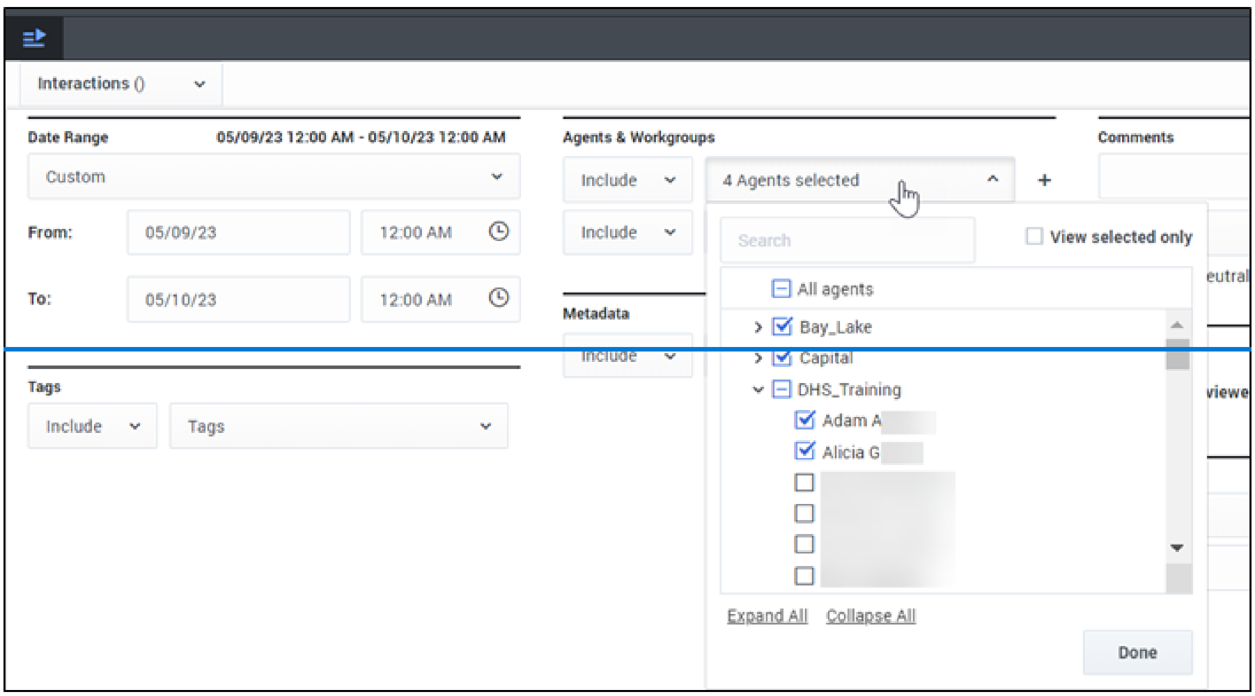


~~Choose **Custom** to display From and To fields and enter your own range of dates and times.~~



~~**Search by Agent Name**~~

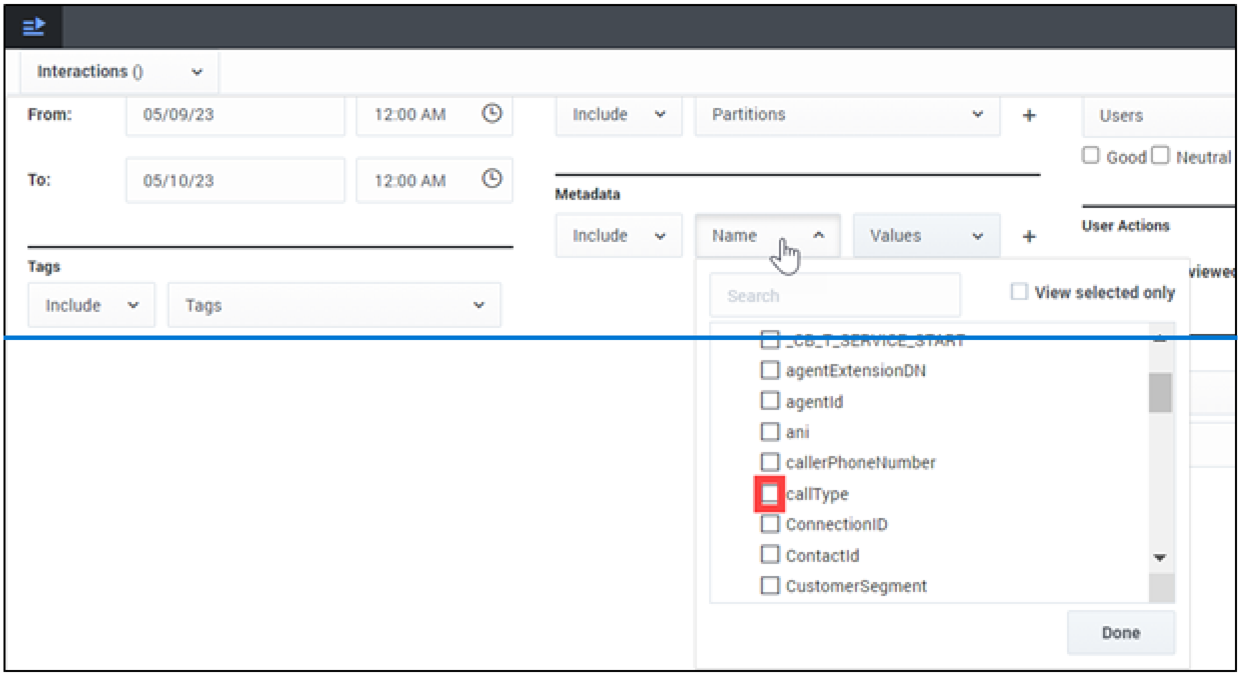
~~To search by agent name, select a name from a **consortium folder** in the Agents & Workgroups section. Multiple agents can be selected one-by-one, as a consortium, or as multiple consortia.~~



~~**Search by Call Type**~~

~~To search by the inbound or outbound call type, select **callType** from the **Name** drop-down menu in the Metadata section.~~

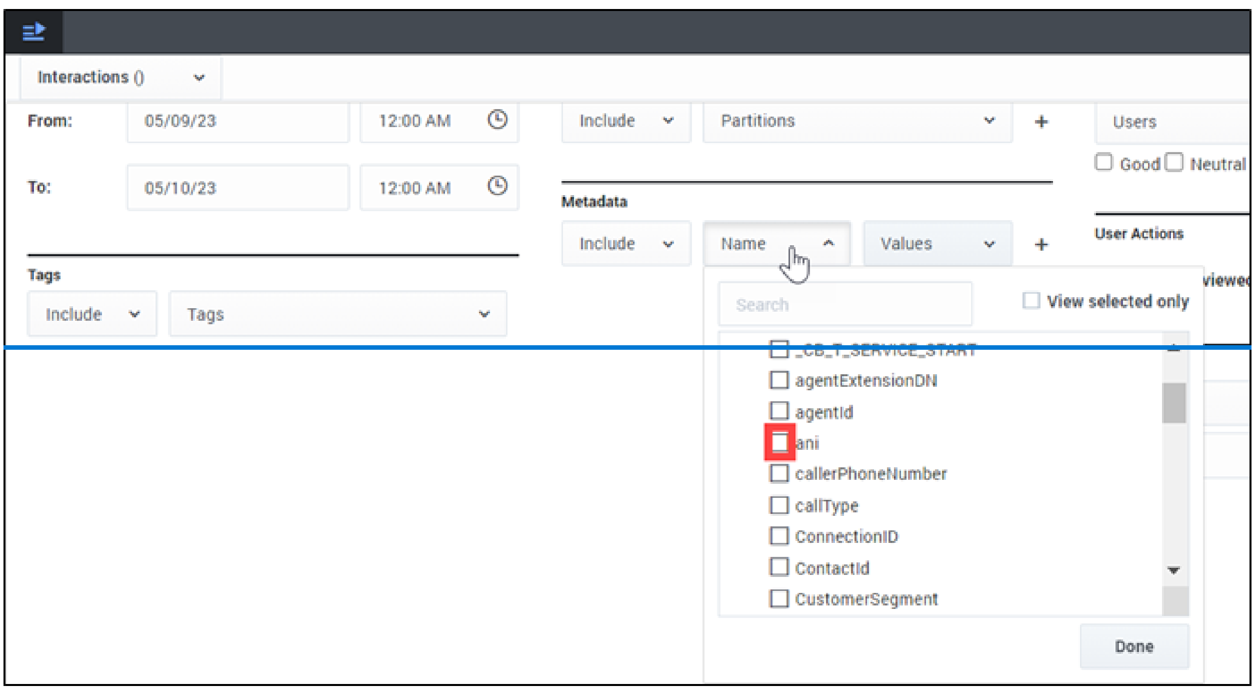
~~Then select **Values** and enter either **Inbound** or **Outbound**.~~



~~**Search by Caller Phone Number**~~

~~To search by the caller's phone number, select **ani** from the **Name** drop-down menu in the Metadata section.~~

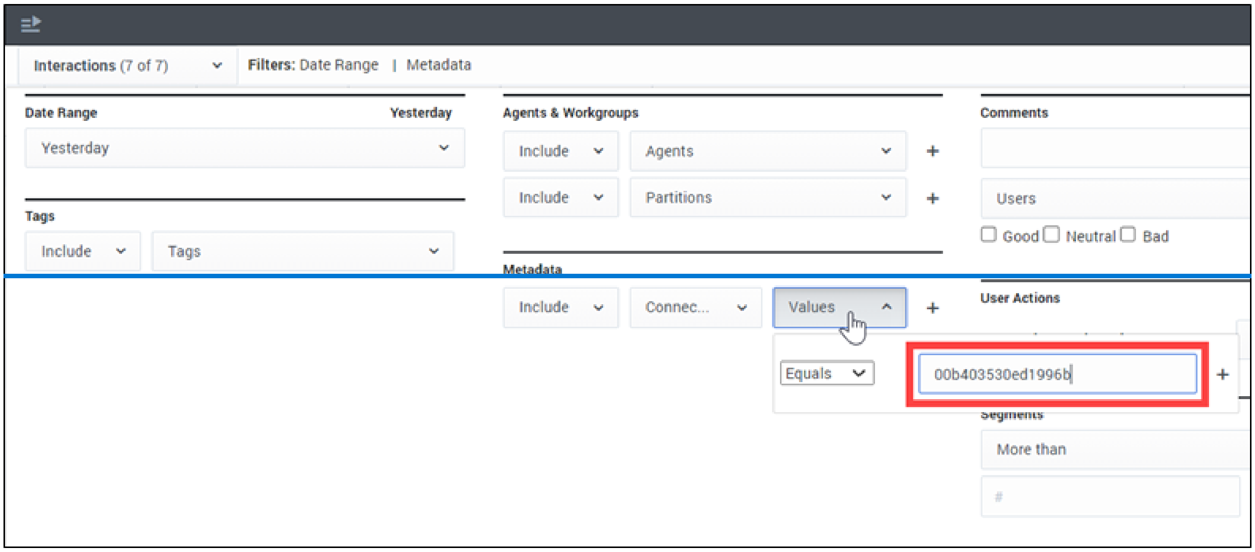
~~Then select **Values** and enter the phone number. Be sure to add **+1** at the start of the phone number. For example: +16081234567.~~



~~**Search by ConnectionID**~~

~~To search by ConnectionID, select ConnectionID from the Name drop-down menu in the Metadata section.~~

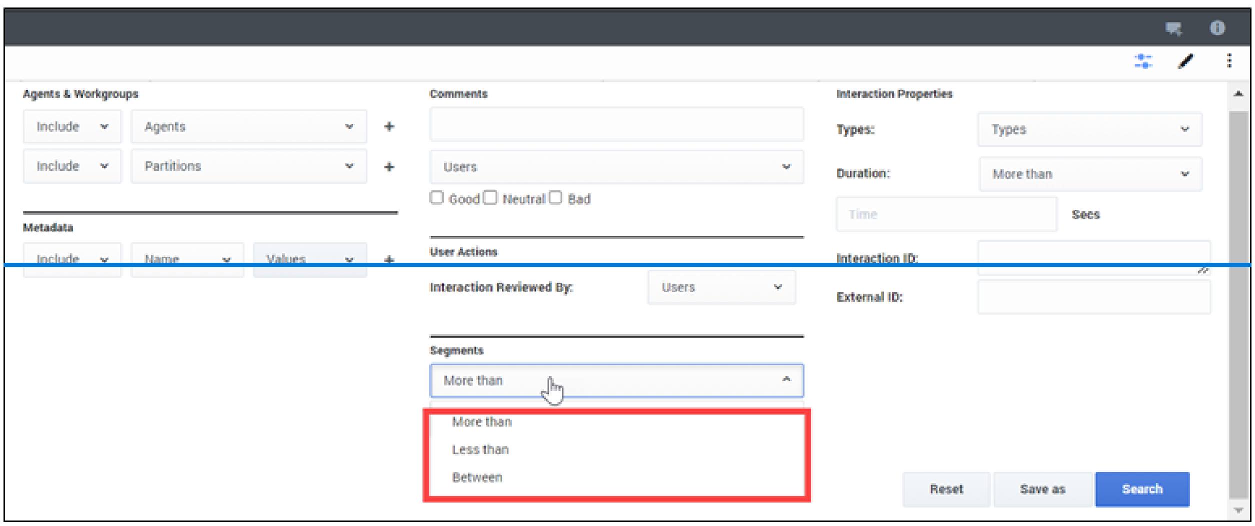
~~Then select **Values** and copy and paste the **ConnectionID**.~~



~~Search by Number of Segments~~

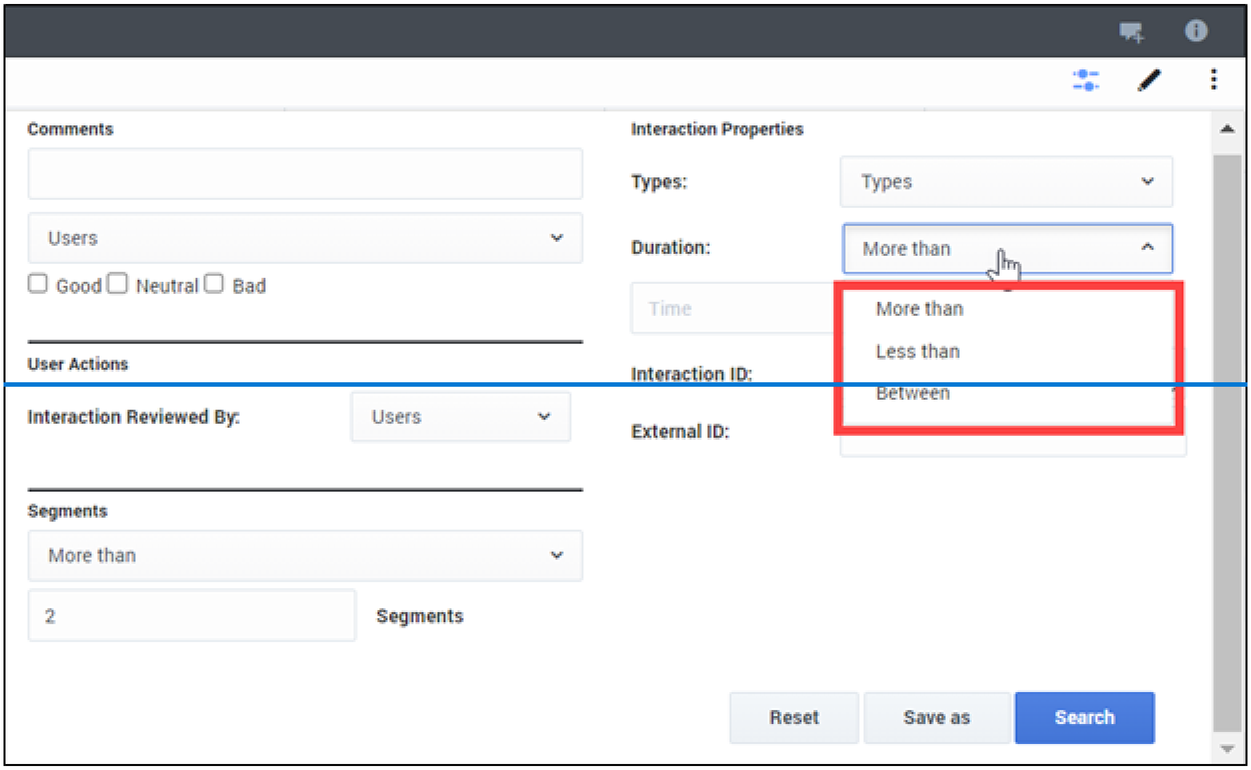
~~To search by number of call segments, select **More than**, **Less than**, or **Between** from the Segments section drop-down menu. Then enter the number of segments in the **Segments** field.~~

~~Examples of call segments include ATS signature and call transfers.~~



~~Search by Call Duration~~

~~To search by call duration, select **More than**, **Less than**, or **Between** from the **Duration** drop-down menu in the Interaction Properties section. Then enter the number of seconds in the **Secs** field.~~



~~*7.2.2.2 Sorting Results and Listening to Calls*~~

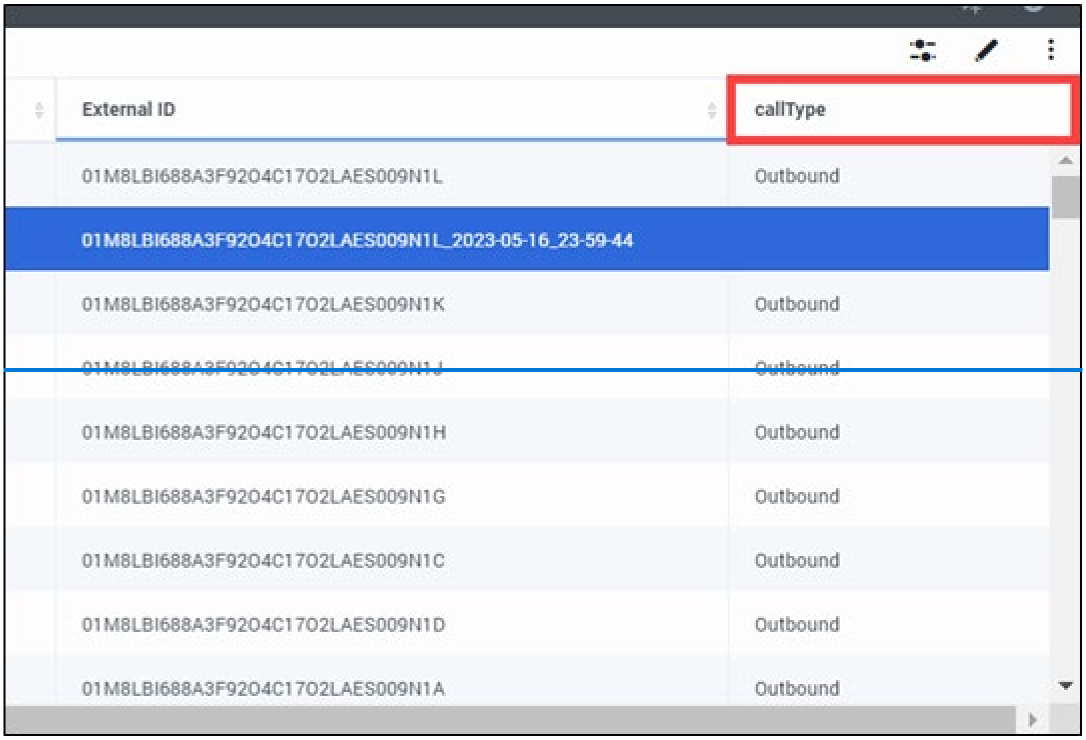
1. ~~Sorting Results~~
2. ~~Adjusting Search Criteria~~
3. ~~Listening to Calls~~

~~(Video instructions available: Sorting Results and Listening to Calls)~~

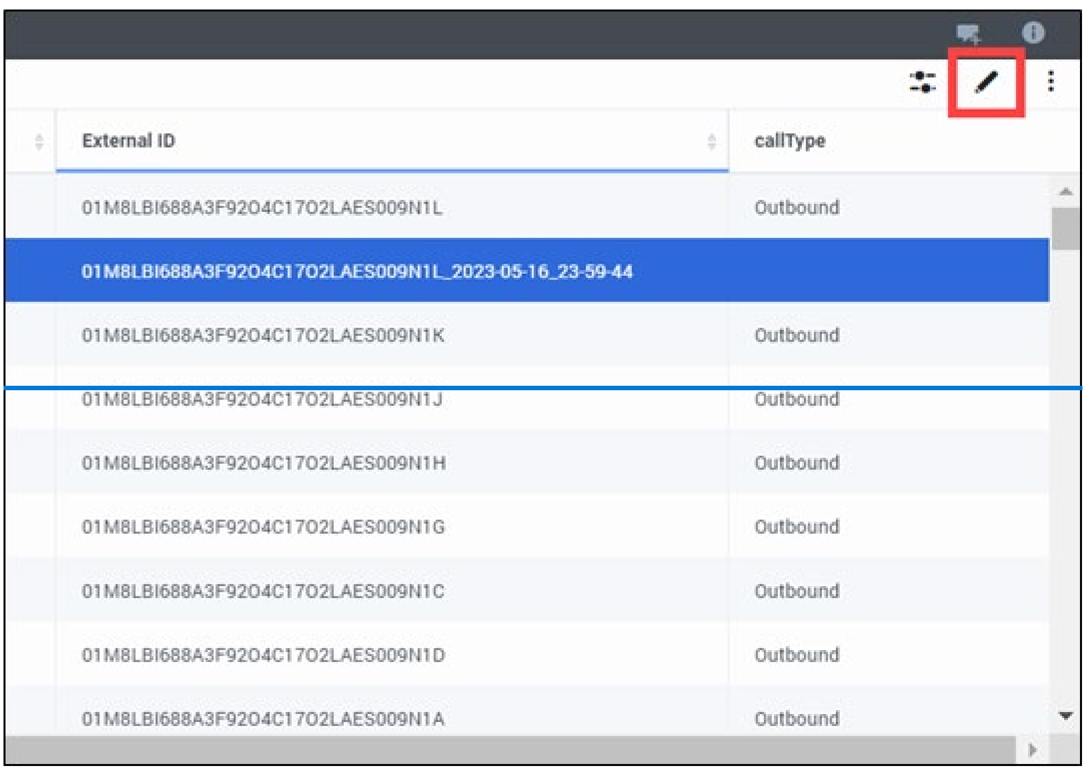
~~After searching for a call, you can sort the results and listen to calls in the Explore Tab.~~

~~Sorting Results~~

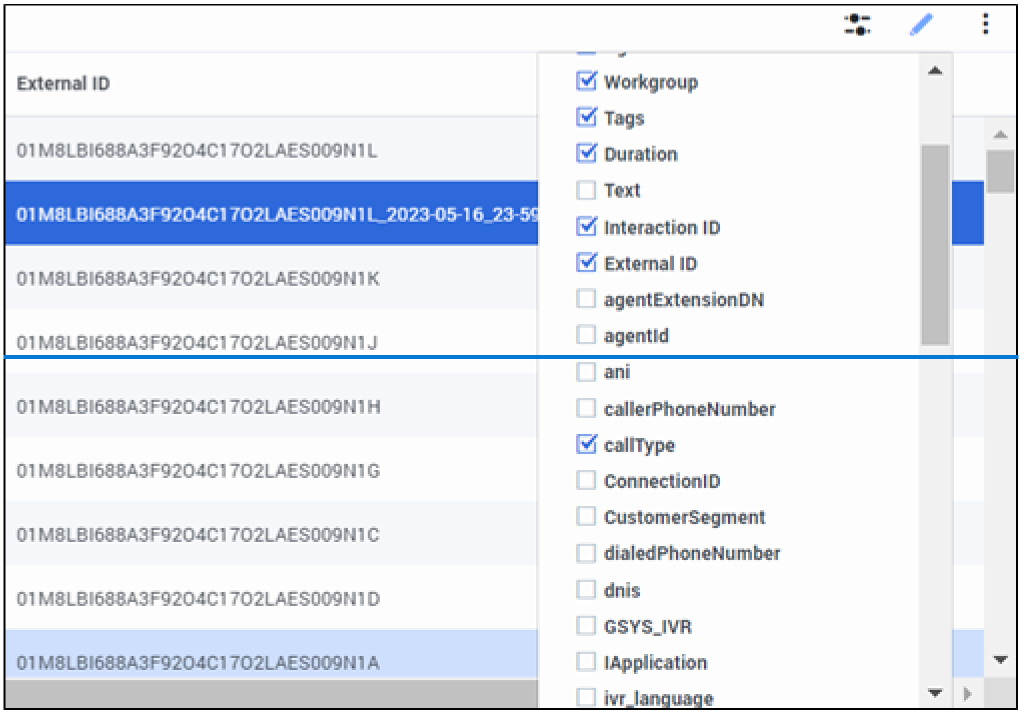
~~The search results columns can be adjusted as needed. For example, if searching by inbound calls, you can add the callType column to the search results.~~



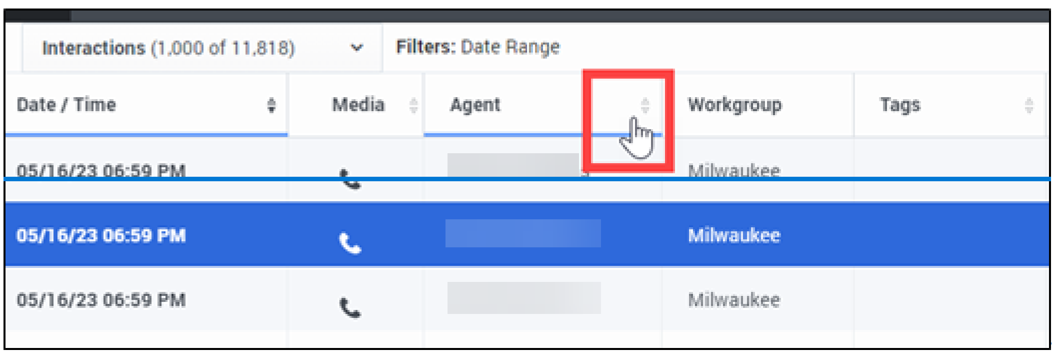
~~To adjust the search results columns, click the Select Columns icon that looks like a pencil on the results screen.~~



~~Then select the columns to add or remove. Note that any adjustments made to the results columns will be saved for future searches.~~



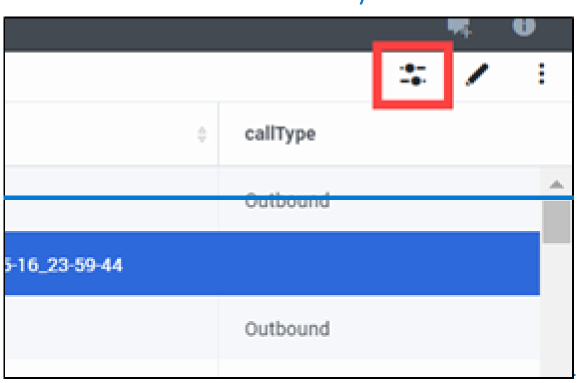
~~Click arrows in a column to sort the results by ascending or descending order.~~



~~**Adjusting Search Criteria**~~

~~To return to the search page and adjust the search criteria, click the Search Filters slide icon that looks like sliders.~~

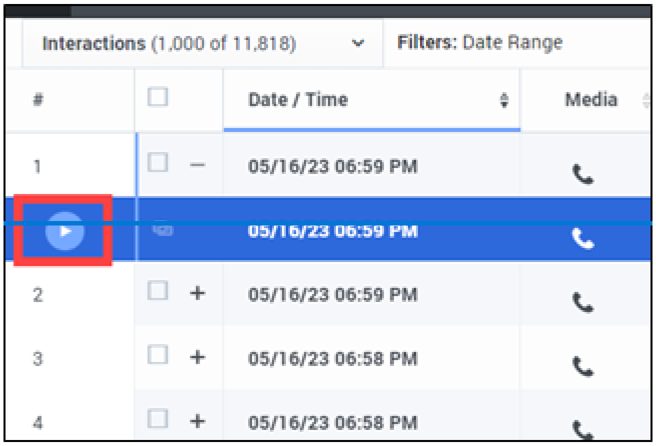
~~Do not use the back button on your browser to return to the search page.~~



~~**Listening to Calls**~~

~~To listen to a call, click the play button next to the segment of call on the search results page.~~

~~Some calls may have multiple segments for the ATS signature or if the call was transferred. Click the plus icon next to the call to see the segments.~~



~~*7.2.2.3 Saving Searches*~~

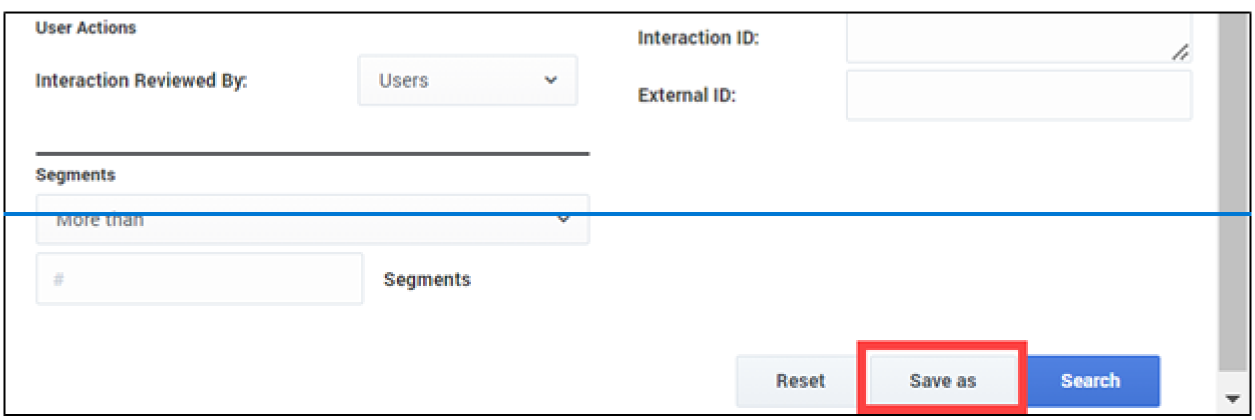
1. ~~Saving a Search~~
2. ~~Viewing Saved Searches~~
3. ~~Running Saved Searches~~
4. ~~Editing Saved Searches~~
5. ~~Deleting a Saved Search~~

~~(Video instructions available: Saving Searches)~~

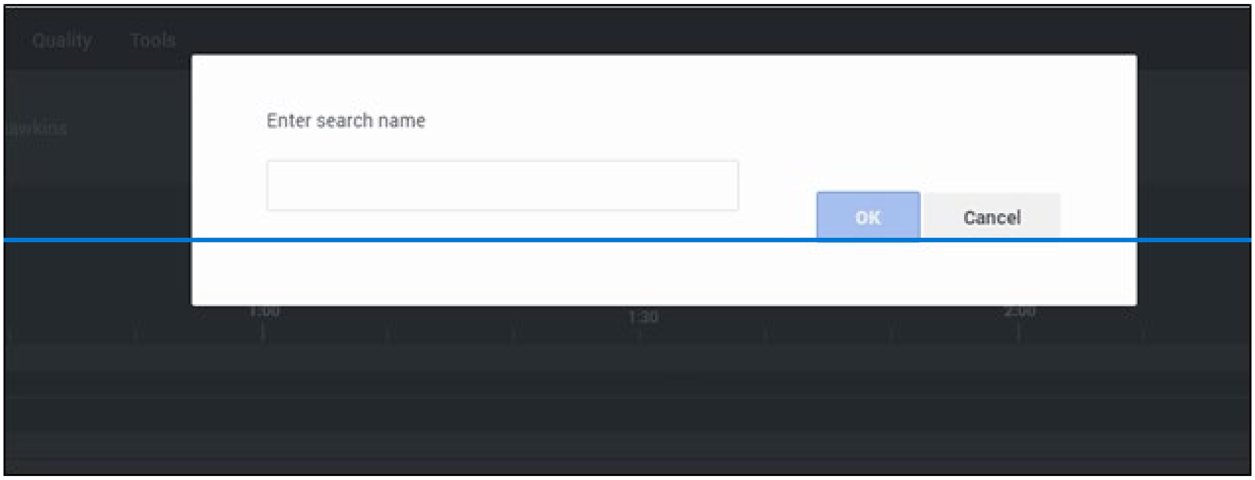
~~Saving a search in the Explore Tab can be helpful when the same criteria will be used multiple times. For example, saving a search that groups yesterday's calls together.~~

~~**Saving a Search**~~

~~To save a search, confirm the criteria to use and select **Save as** as on the search page.~~

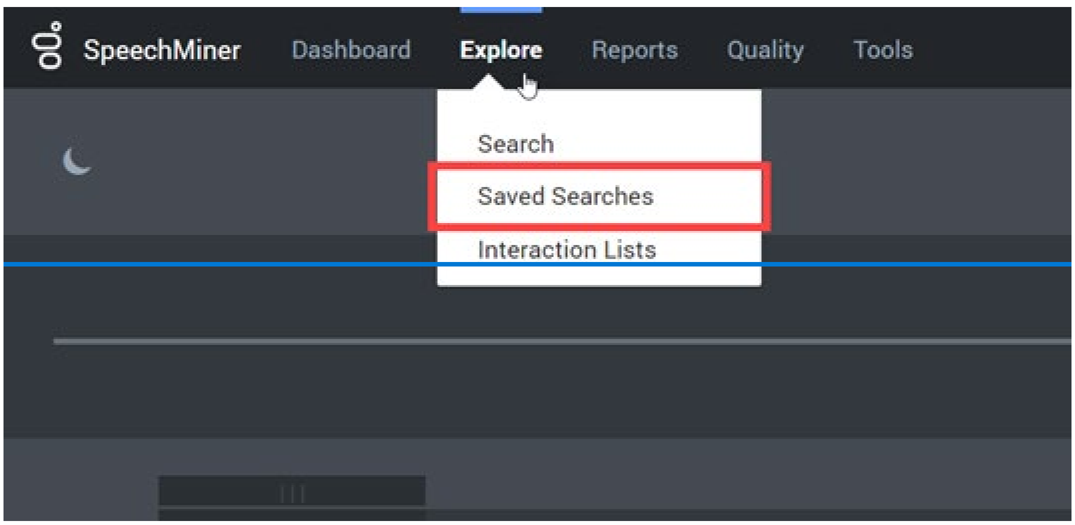


~~Enter a name for the search and select **OK**.~~



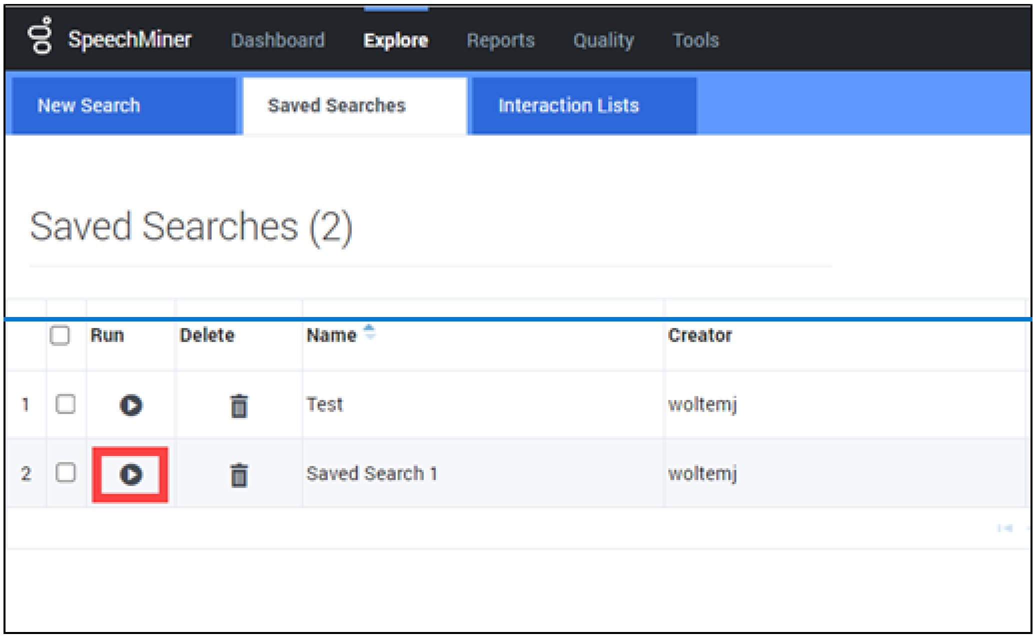
~~Viewing Saved Searches~~

~~To view your saved searches, select **Explore**, then **Saved Searches**.~~



~~Running Saved Searches~~

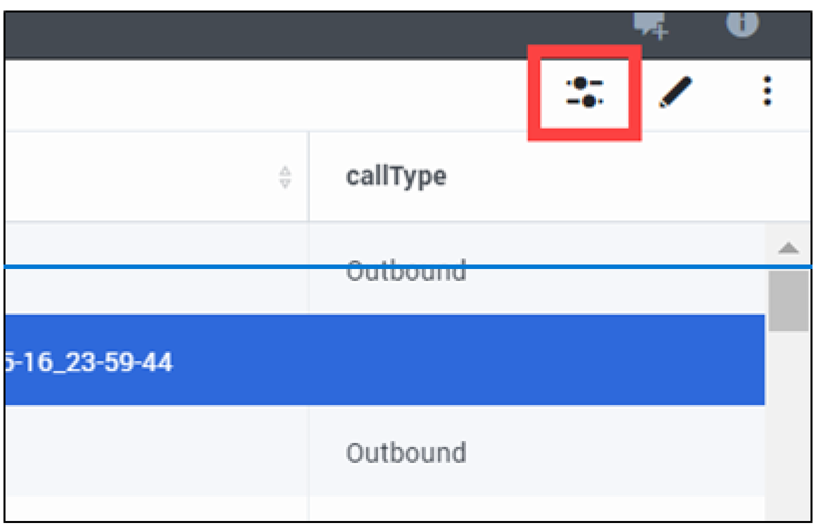
~~To run a saved search, use the play button next to the search on the Saved Searches page.~~



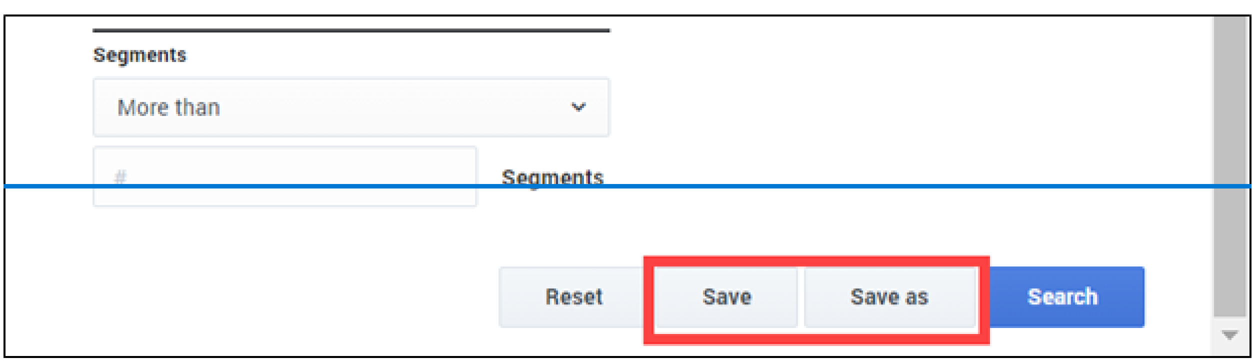
~~**Editing Saved Searches**~~

~~To edit a saved search, first run the search. This will open a new browser window.~~

~~Then select the **Search Filters** icon that looks like sliders to return to the search page.~~

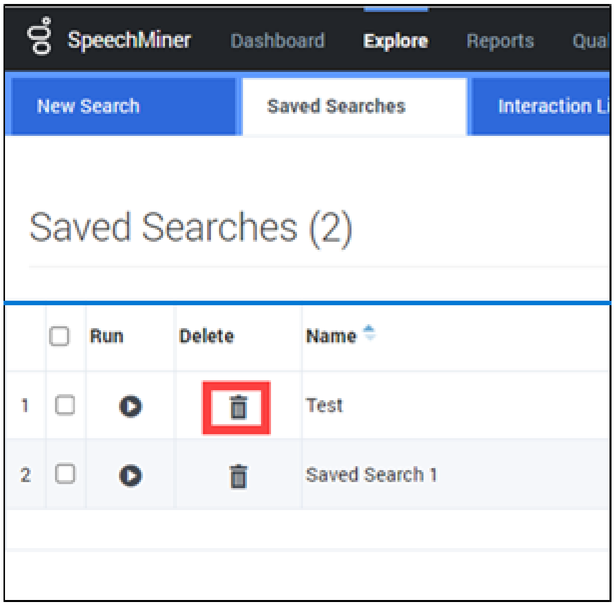


~~Make any necessary changes, then select **Save** to update the saved search or **Save as** create a new saved search.~~



~~**Deleting a Saved Search**~~

~~To delete a saved search, select the **trash icon** next to the search. Select **Yes** in the pop-up menu to confirm.~~



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

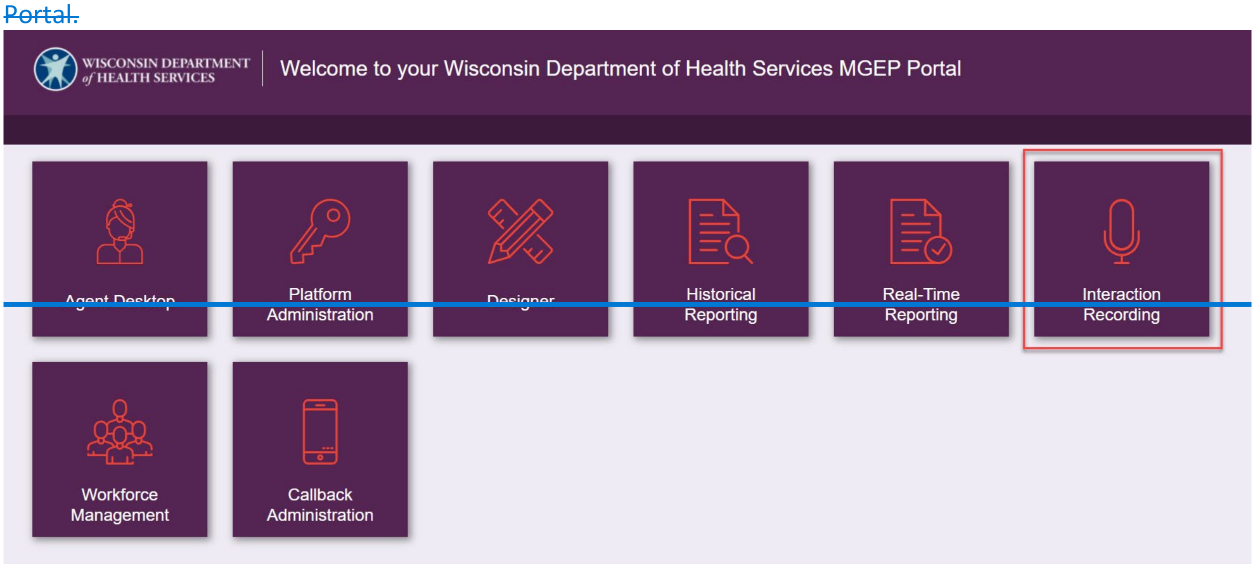
~~(Video instructions available: Download the Call and Upload the Call to the ECF)~~

~~Staff with supervisor access can use Interaction Recording to download a phone recording and save it to their computer. This process cannot be completed for calls older than 30 days.~~

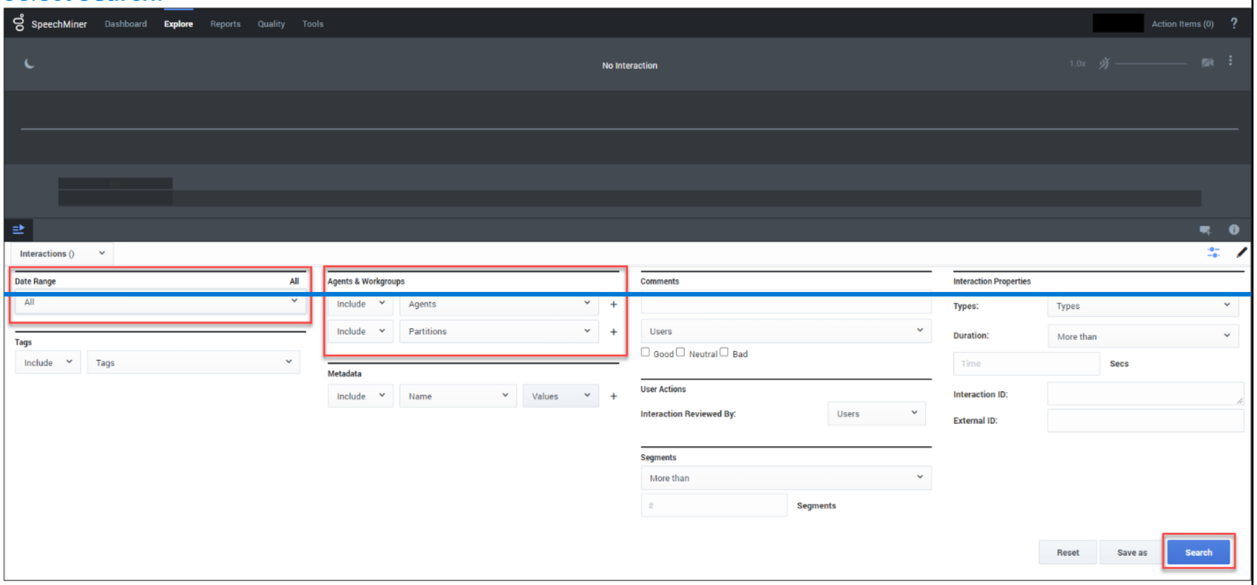
~~**Note:**~~	~~Compression software (such as WinZIP) is required to complete this process. Contact your local IT department if compression software is not installed.~~

~~To download the call:~~

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



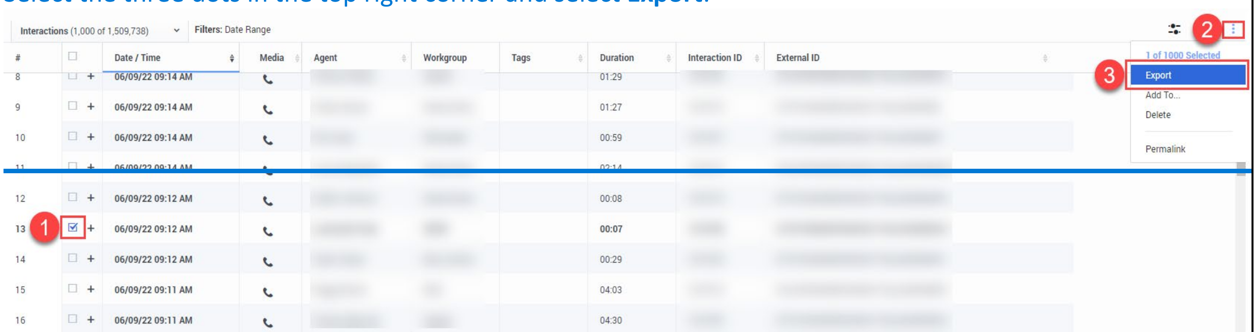
2. ~~Open the Explore Tab and begin searching by using the “Date Range” or “Agent” filters. Select **Search**.~~



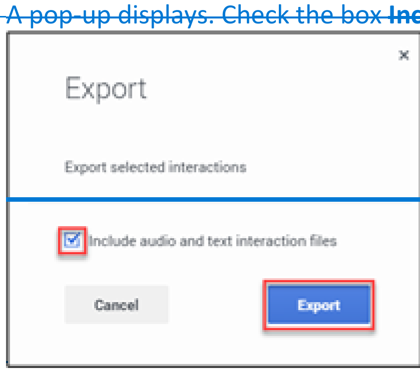
3. ~~Go through the recordings to find the one of interest. If the call is not found after searching, the recording may not exist.~~

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

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

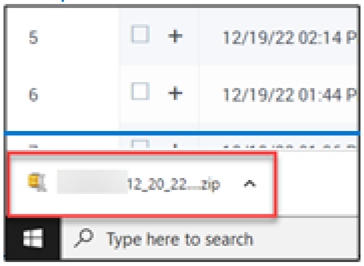


6. ~~A pop-up displays. Check the box **Include audio and text interaction files** and select **Export**.~~



7. ~~The user selects the ZIP file, unzips it, and saves the recording to their computer. If the user needs assistance on how to unzip and save the recording to their computer, they should contact their local~~

~~IT department.~~



~~Income Maintenance (IM) workers looking for instructions to upload the recording to the ECF see Process Help 6.5.2.1 Telephnonic Signature Recording not found in the ECF.~~

~~8 Segment Administrators~~

~~8.1 Managing User Accounts~~

~~8.2 Business Controls~~

~~This section is for local administrators that work for local agencies. Tasks involved are:~~

- ~~Adding agent skills~~
- ~~Agent groups~~
- ~~Business controls~~

~~8.1 Managing User Accounts~~

~~8.1.1 Logging in to Manage User Accounts (Video instructions available: Logging in to Manage User Accounts)~~

~~8.1.2 Setting a Skill for an Agent (Video instructions available: Setting a Skill for an Agent)~~

~~8.1.3 Adding a Skill for an Agent (Video instructions available: Adding a Skill for an Agent)~~

~~8.1.4 Adding a Skill for Multiple Agents (Video instructions available: Adding a Skill for Multiple Agents)~~

~~8.1.5 Adding an Agent to an Agent Group (Video instructions available: Adding an Agent to an Agent Group)~~

~~8.1.6 Adding or Removing a Supervisor from a Static Agent Group~~

~~8.1.6.1 Adding a Supervisor to a Static Agent Group (Video instructions available: Adding a Supervisor to a Static Agent Group)~~

~~8.1.6.2 Removing a Supervisor from a Static Agent Group (Video instructions available: Removing a Supervisor from a Static Agent Group)~~

~~8.1.7 Quick Agent Search in Platform Administration (Video instructions available: Quick Agent Search in Platform Administration)~~

~~8.1.8 Editing General Agent Information (Video instructions available: Editing General Agent Information)~~

~~This section includes instructions for how to assign skills to an agent and adding agents to agent groups.~~

~~8.1.1 Logging in to Manage User Accounts~~

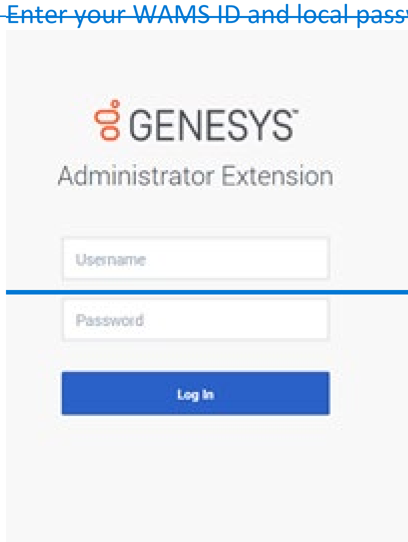
~~(Video instructions available: Logging in to Manage User Accounts)~~

~~All tasks for managing user accounts take place in Platform Administration. To log in:~~

1. ~~Open the Genesys Portal with Firefox, Edge, or Chrome.~~

~~2. Select Platform Administration to open the log in screen.~~

~~3. Enter your WAMS ID and local password.~~



~~**Note:**~~	~~The local password is set up on initial log in to Genesys (see Section 10.1 Setting a Local Password).~~

~~After logging in, the Configuration Manager page displays with four different categories of platform administration which are:~~

- ~~Accounts~~
- ~~Routing/Digital~~
- ~~Environment~~
- ~~Switching~~

~~8.1.2 Setting a Skill for an Agent~~

~~(Video instructions available: Setting a Skill for an Agent)~~

~~Skills are assigned to workers to identify queue assignment in different areas such as multilingual or an agent with experience in other programs. Skills have a numeric value of 0 or 10 to the agent for that skill. 0 means~~

~~they are not assigned to the queue associated to the skill, 10 means they are assigned to the queue. For example, an agent can be added to the Spanish queue by assigning a value of 10 to the Spanish skill.~~

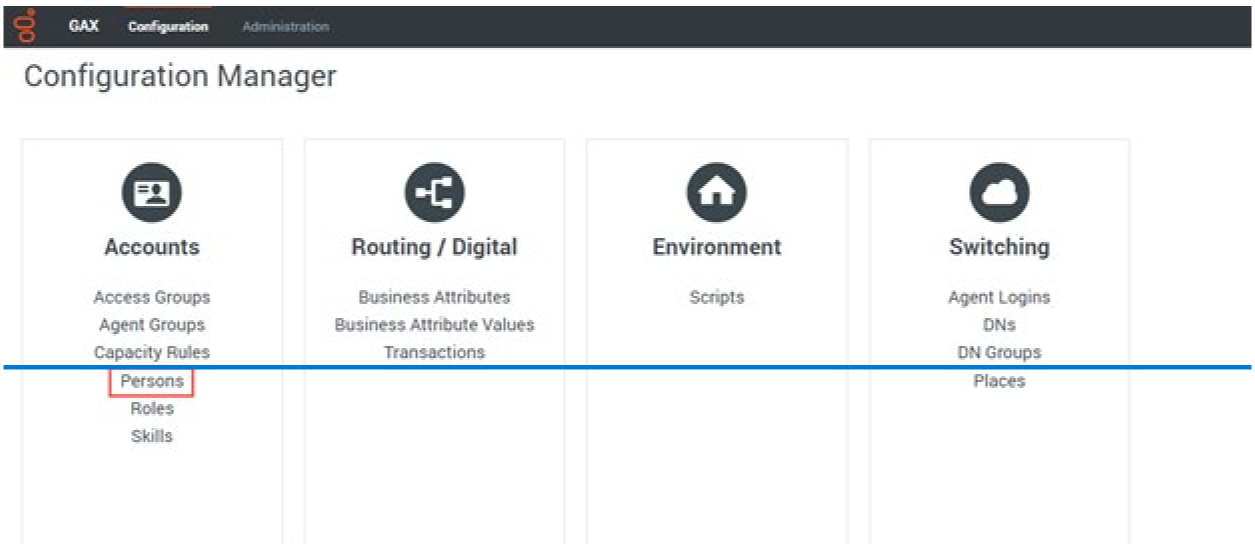
~~**Note:**~~	~~Agents are either skilled at 0 or 10.~~

~~To assign a skill to an agent:~~

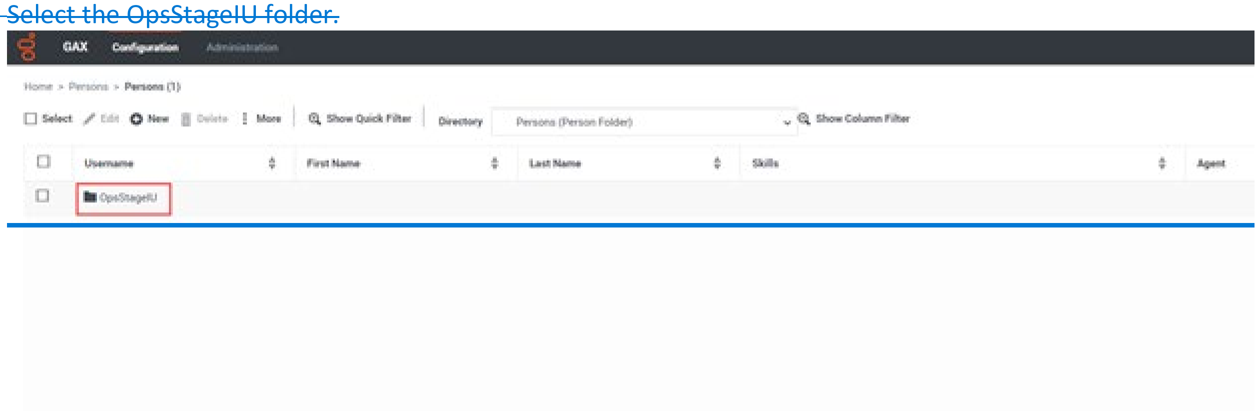
1. ~~Select the Persons link under the accounts section on the Configuration Manager page.~~

~~**Note**~~	~~To conduct a quick search for an agent, see Section 8.1.7 Quick Agent Search in Platform Administration, then proceed with step number five.~~

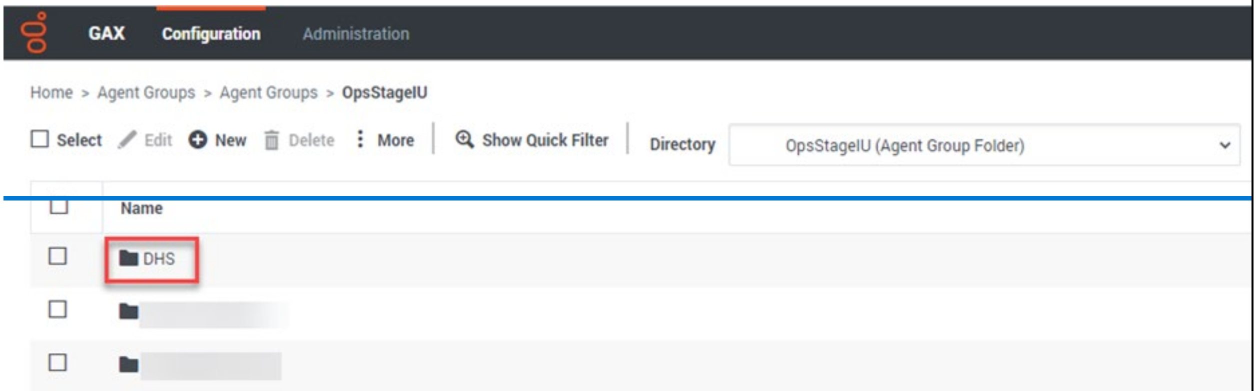
2.



3. ~~Select the OpsStageIU folder.~~

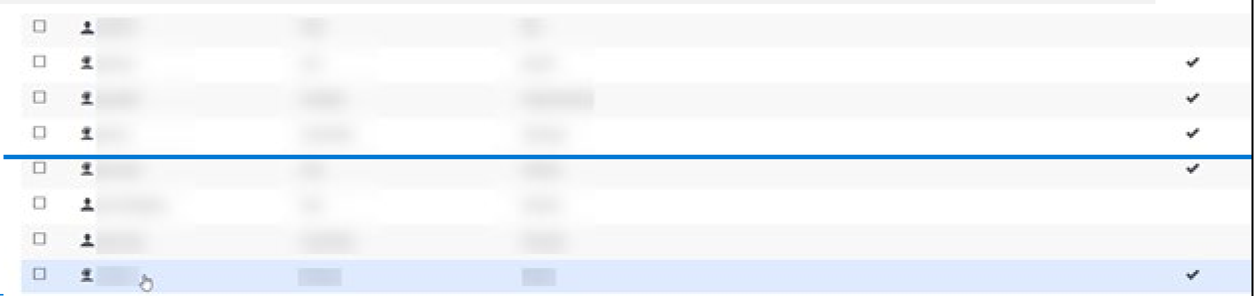


~~4. Select the DHS folder.~~



~~5. Select the DMS folder or the consortium folder the agent is in (Capital, Northern, Milwaukee, etc.), and then select their name to open their profile.~~

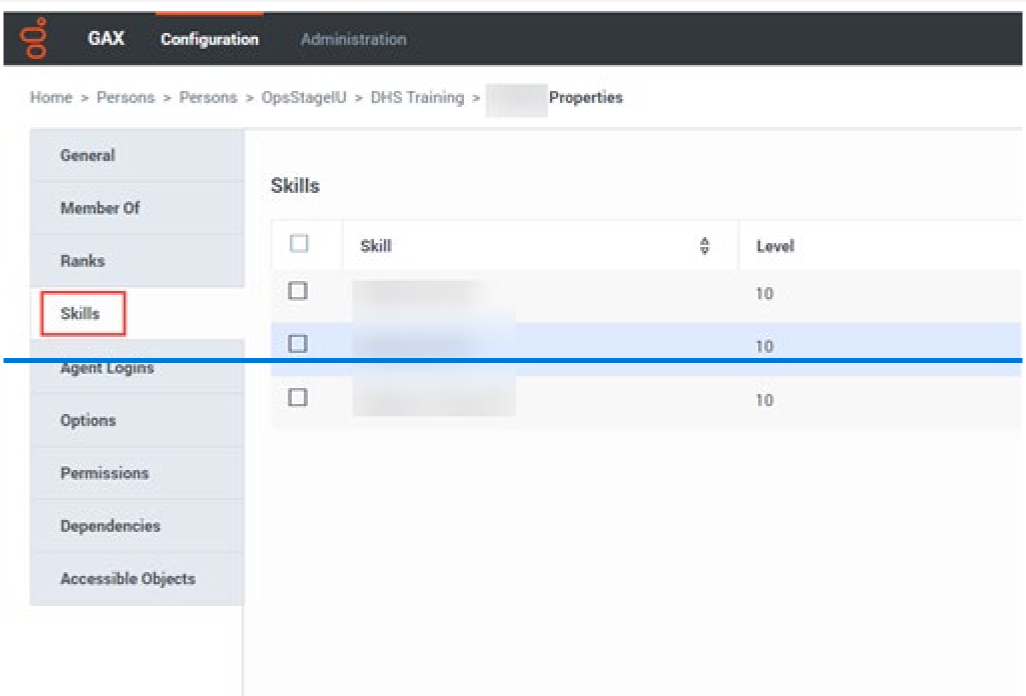
~~**Note:**~~ ~~All other lines of business not related to Income Maintenance are in the DMS folder.~~



~~6.~~

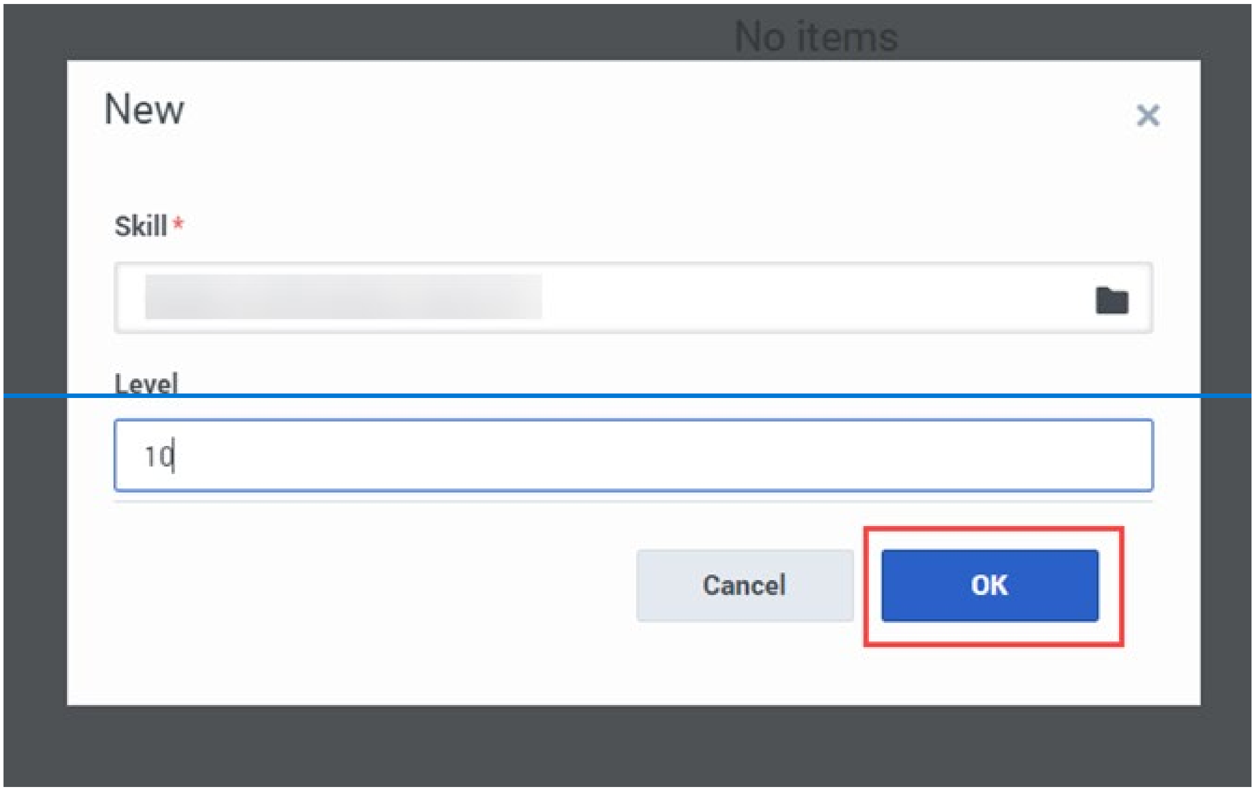
~~7. Select **Skills** on the left-hand list. Once selected, there is a list of the agent's skills.~~

~~**Note:**~~ ~~If you don't see the skill you're looking for, see Section 8.1.3 Adding a Skill for an Agent.~~

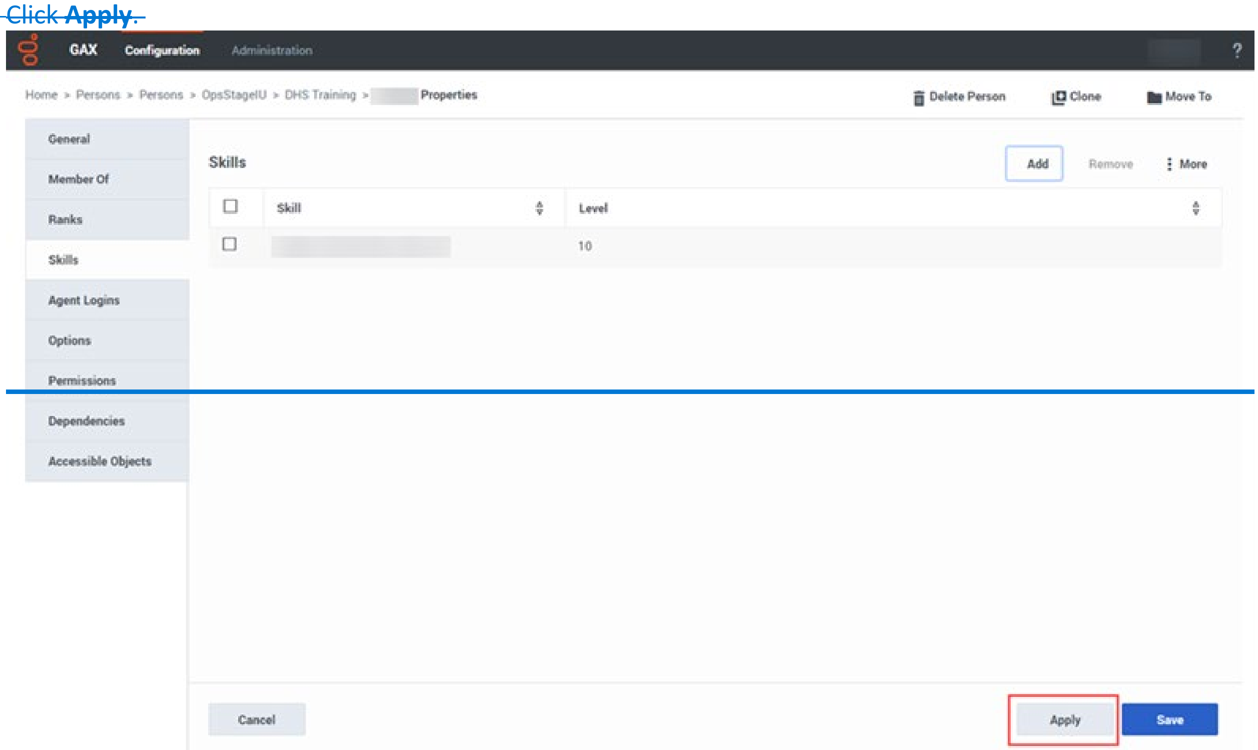


~~8.~~

9. ~~Select the skill from the list and enter **10** in the Level field (0=not added to the queue, 10=added to the queue).~~
10. ~~Click **OK**.~~



11. ~~Click **Apply**.~~



~~**Note:**~~	~~Remove a skill from the agent by selecting the skill and then clicking **Remove**.~~

~~8.1.3 Adding a Skill for an Agent~~

~~(Video instructions available: Adding a Skill for an Agent)~~

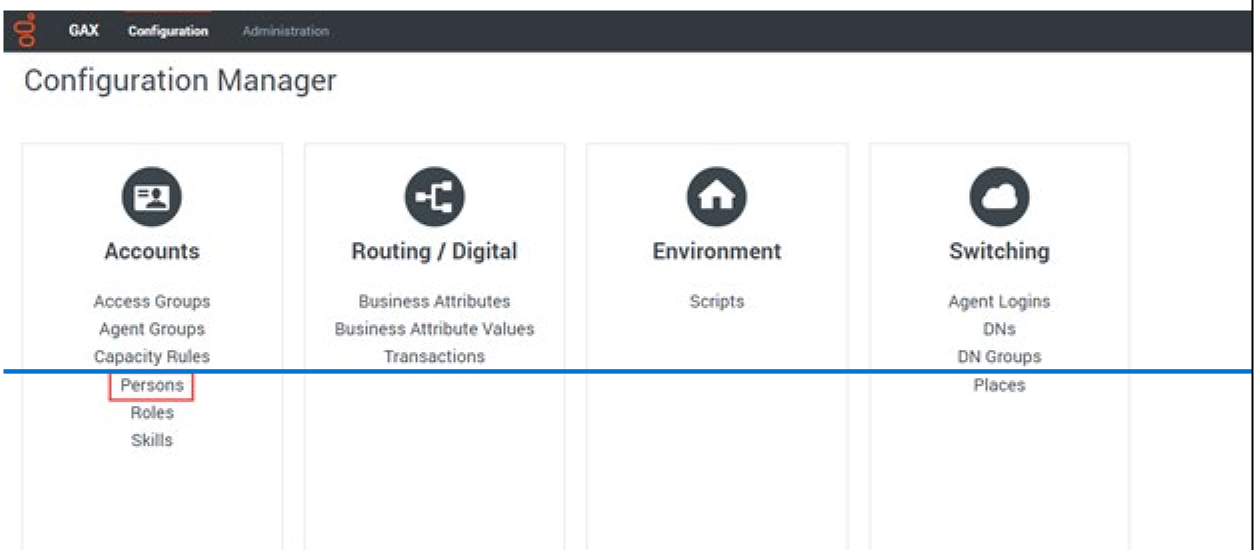
~~Add a skill for an agent if the skill is missing from the agent's profile.~~

~~To add a skill for an agent:~~

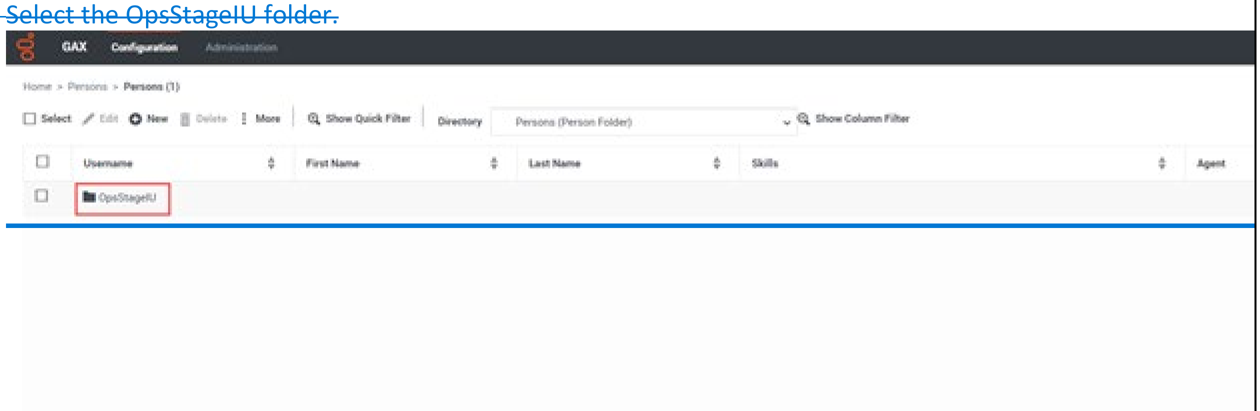
1. ~~Select the Persons link under the accounts section on the Configuration Manager page.~~

~~**Note**~~	~~To conduct a quick search for an agent, see Section 8.1.7 Quick Agent Search in Platform Administration, then proceed with step number five.~~

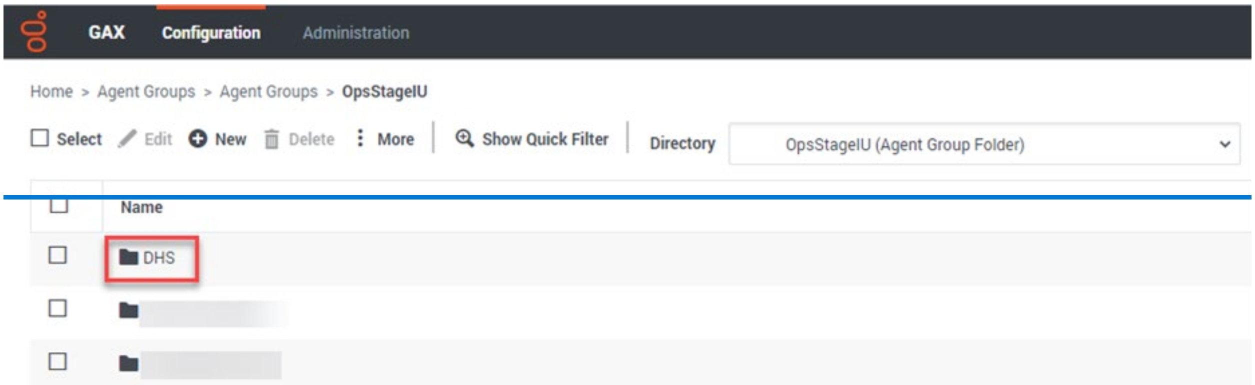
2.



3. ~~Select the OpsStageIU folder.~~

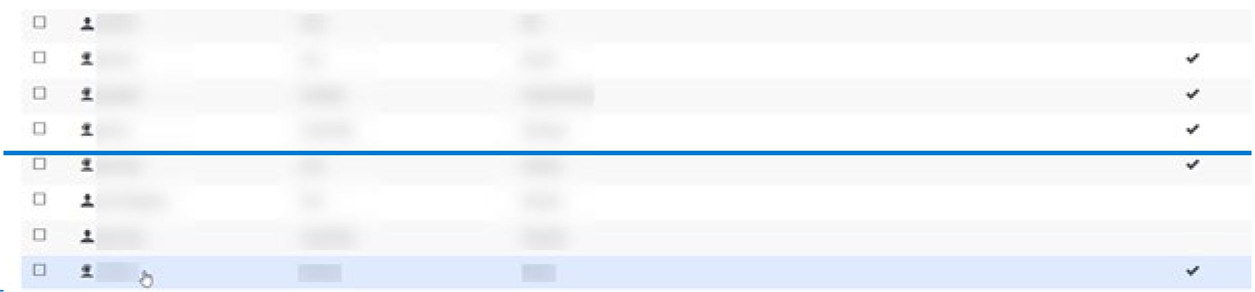


~~4. Select the DHS folder.~~



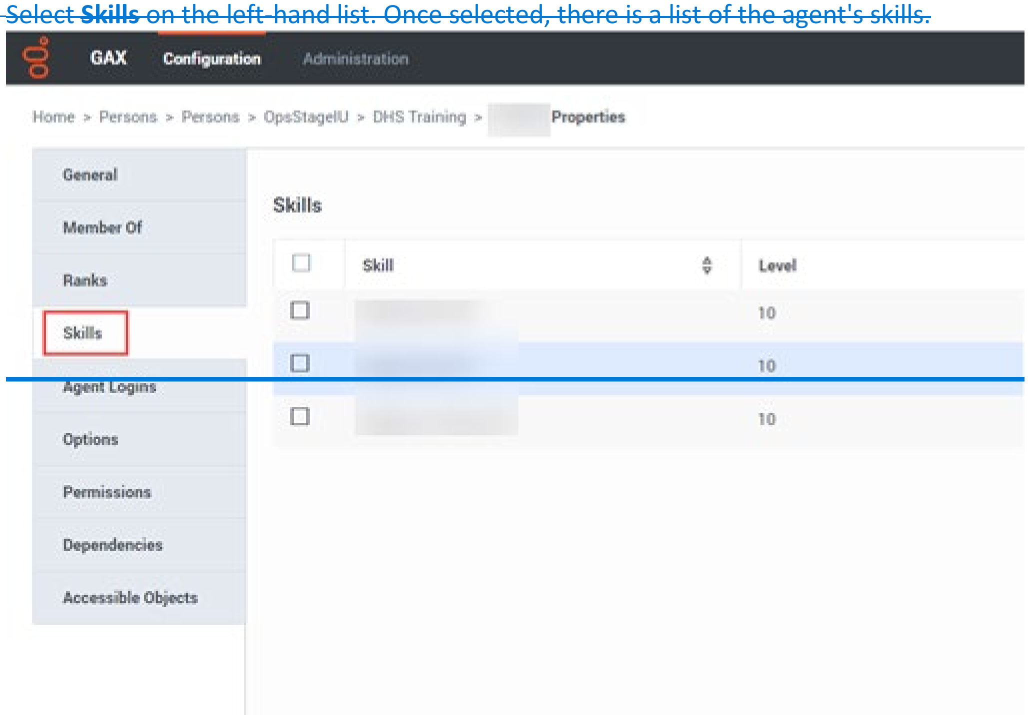
~~5. Select the DMS folder or the consortium folder the agent is in (Capital, Northern, Milwaukee, etc.) and then select their name to open their profile.~~

~~Note:~~ ~~All other lines of business not related to Income Maintenance are in the DMS folder.~~

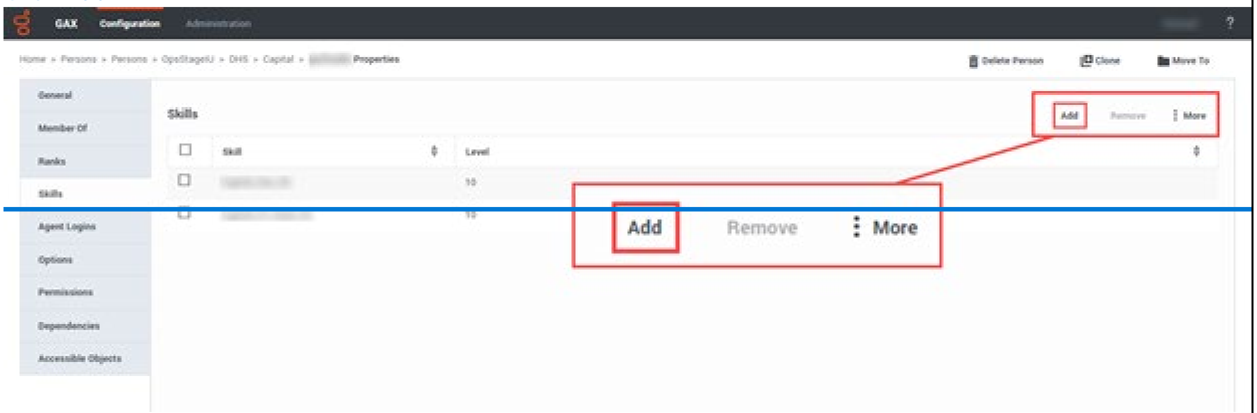


~~6.~~

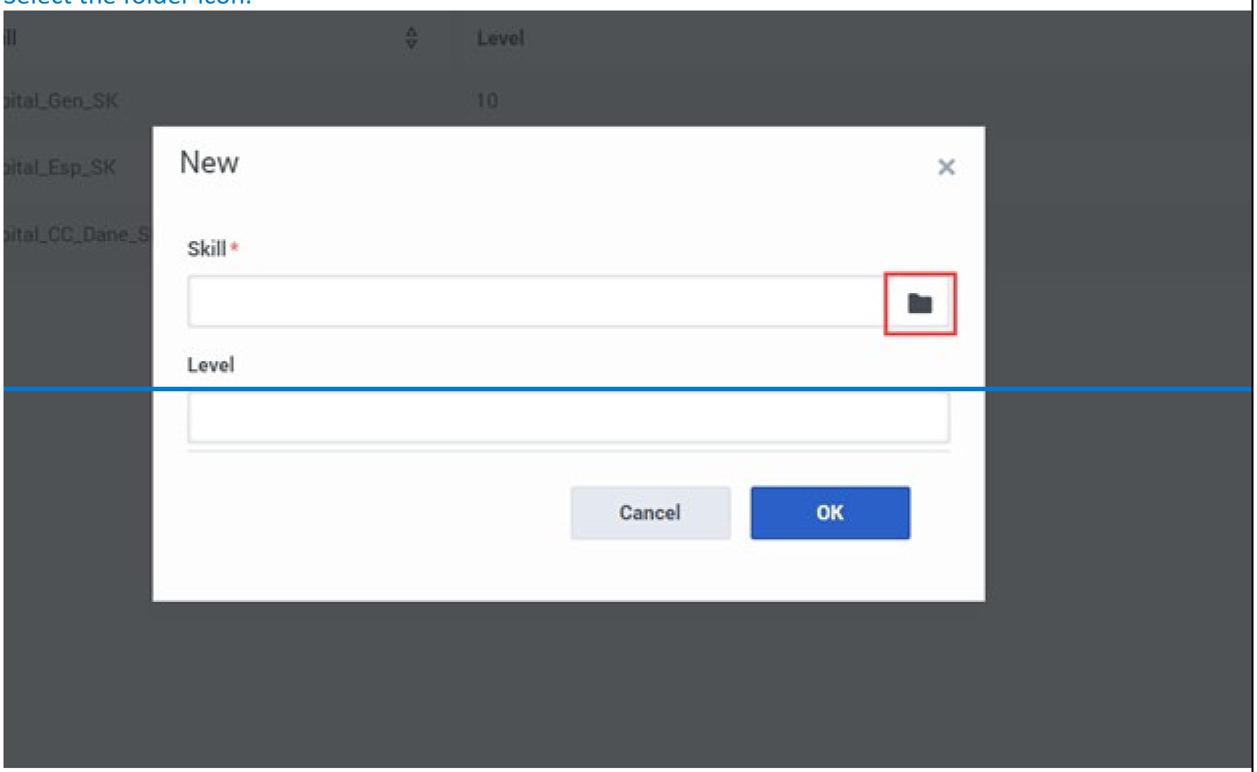
~~7. Select **Skills** on the left-hand list. Once selected, there is a list of the agent's skills.~~



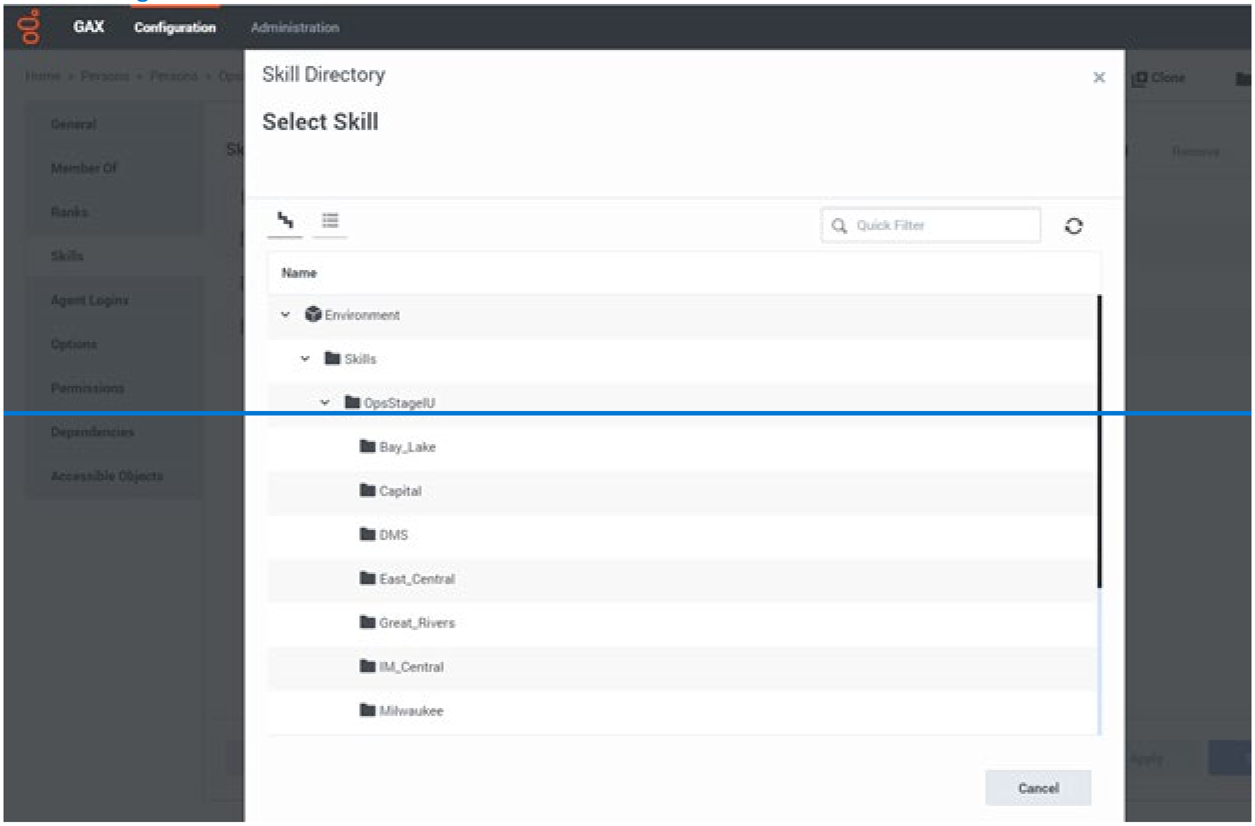
~~8. Click **Add**.~~



~~9. Select the folder icon.~~

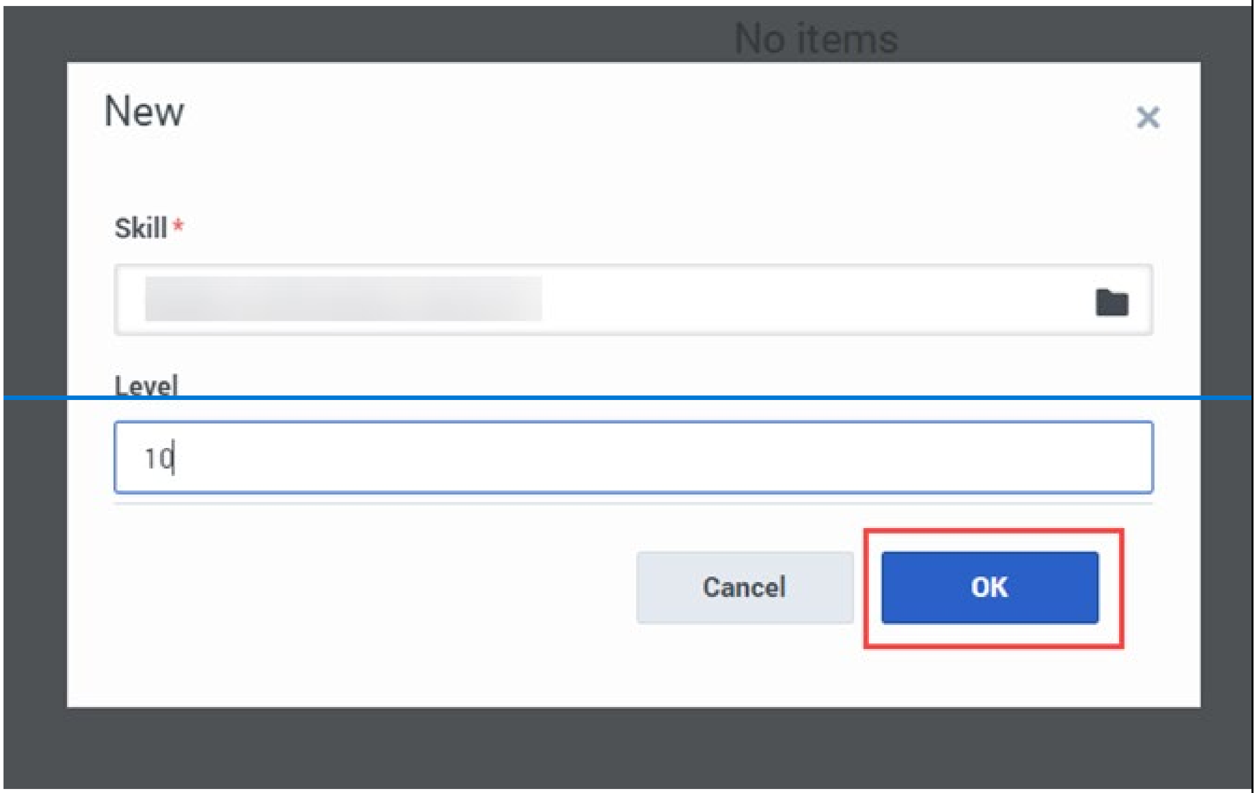


~~10. Select the agent's folder.~~

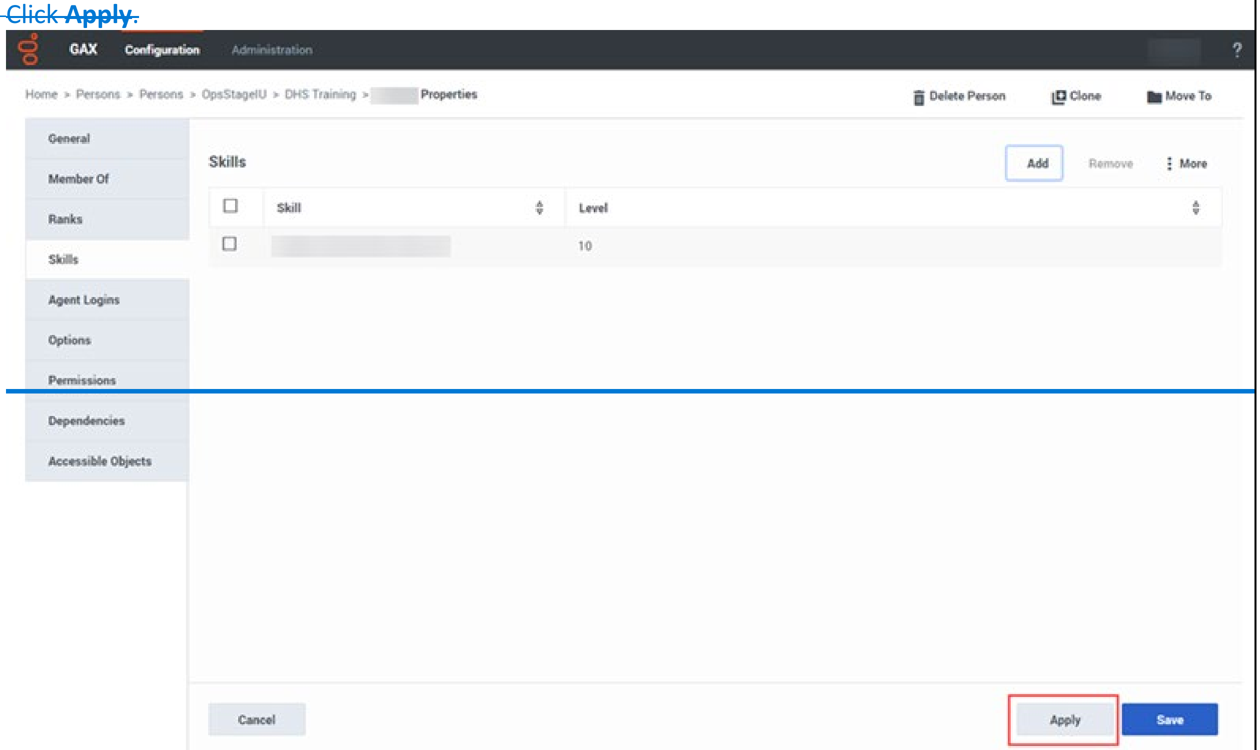


~~11. Select the skill from the list and enter **10** in the Level field (0=not added to the queue, 10=added to the queue).~~

~~12. Click **OK**.~~



~~13. Click **Apply**.~~



~~**Note:**~~	~~Remove a skill from the agent by selecting the skill and then clicking **Remove**.~~

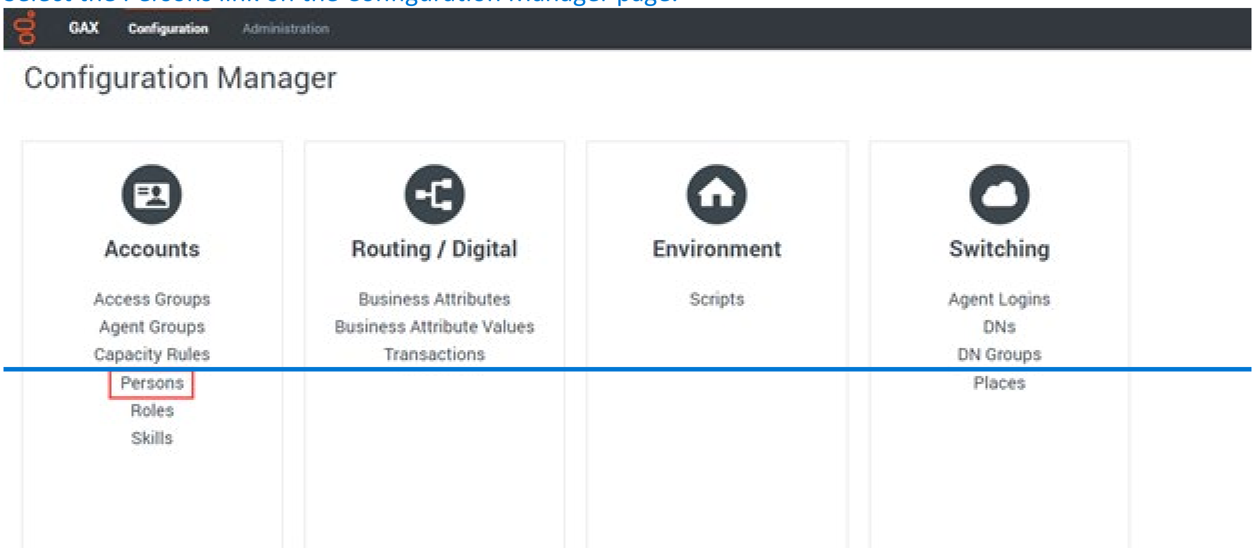
~~8.1.4 Adding a Skill for Multiple Agents~~

~~(Video instructions available: Adding a Skill for Multiple Agents)~~

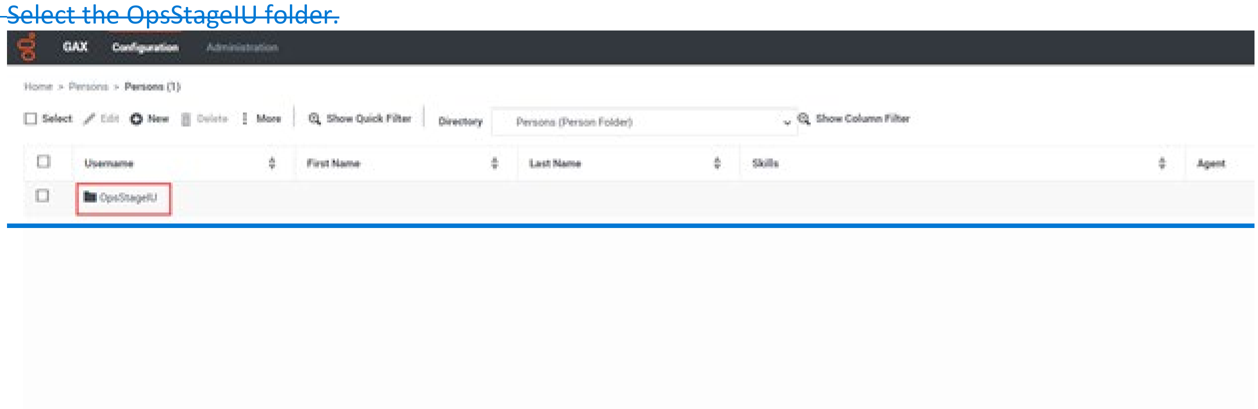
~~Multiple agents can be edited and managed at the same time.~~

~~To add a skill for multiple agents:~~

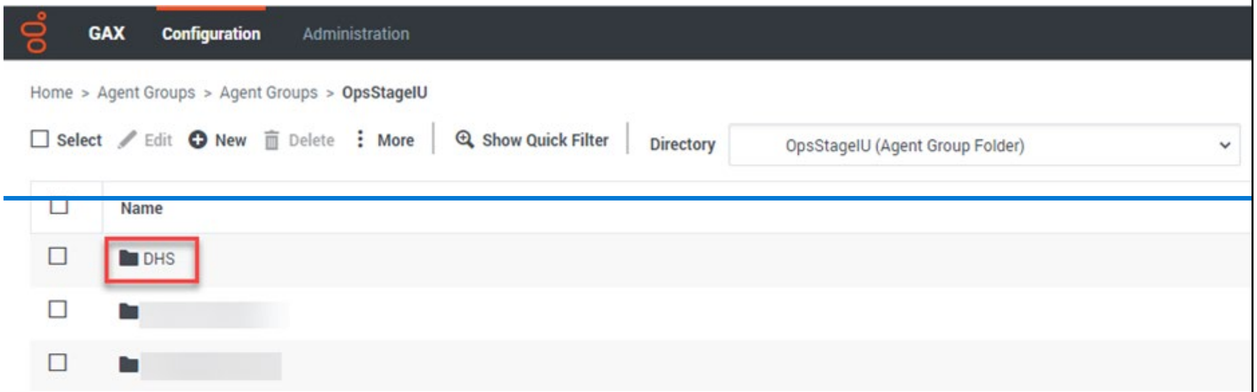
1. ~~Select the Persons link on the Configuration Manager page.~~



2. ~~Select the OpsStageIU folder.~~

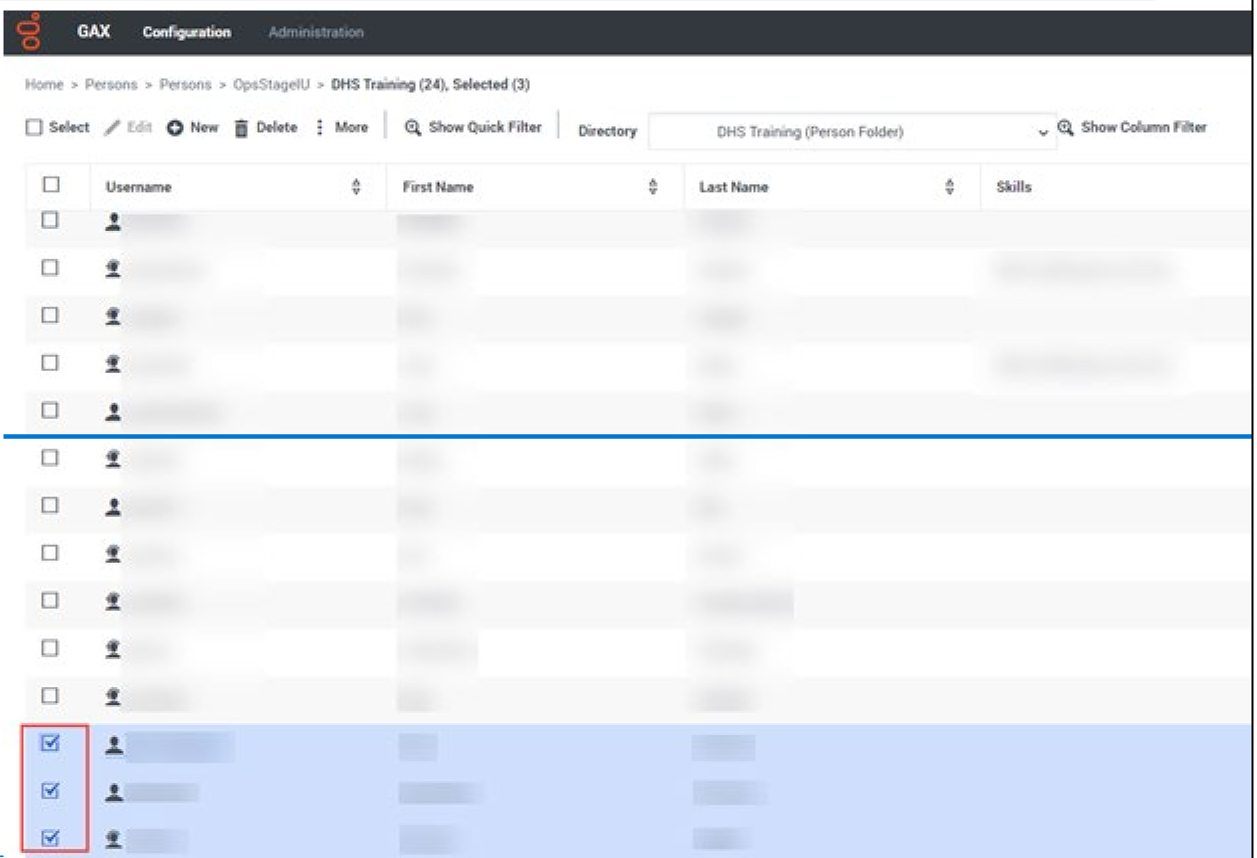


~~3. Select the DHS folder.~~



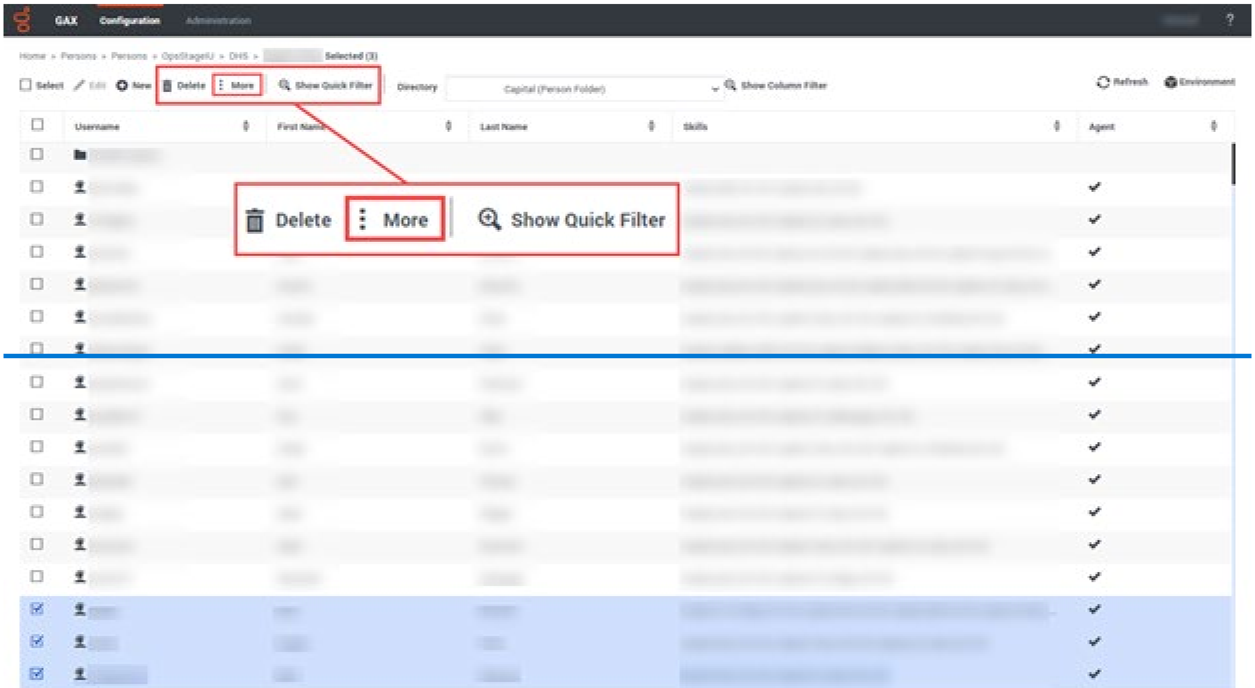
~~4. Select the DMS folder or the consortium folder the agents are in (Capital, Northern, Milwaukee, etc.) and then select the checkboxes next to their names.~~

~~**Note:**~~ ~~All other lines of business not related to Income Maintenance are in the DMS folder.~~

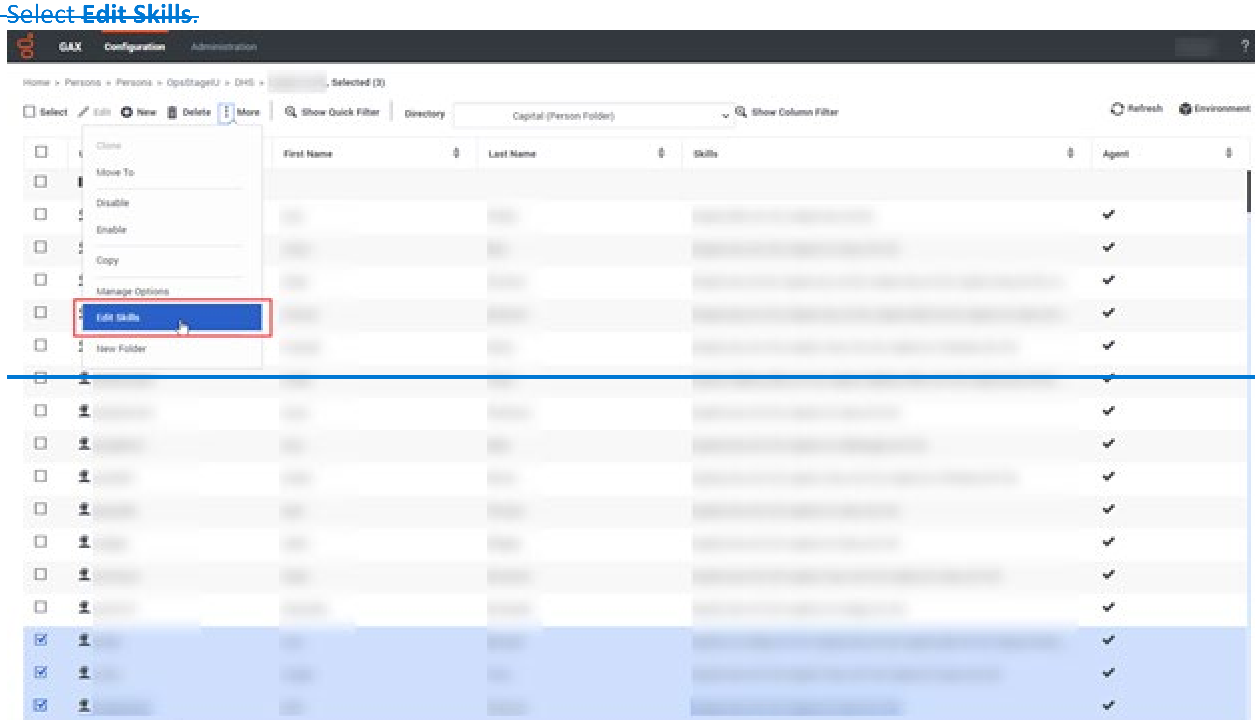


~~5.~~

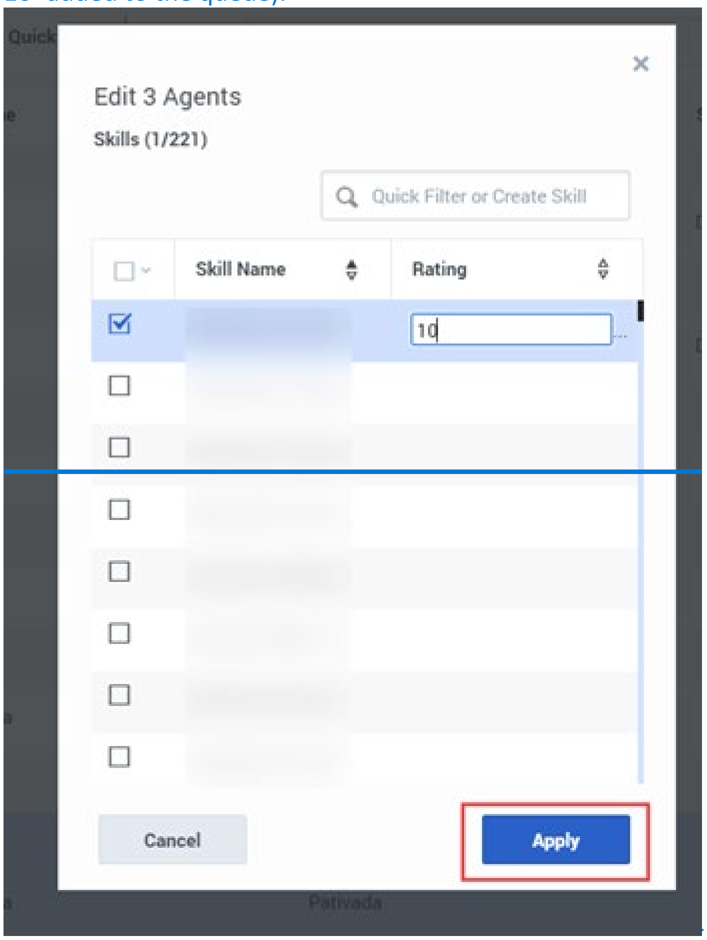
~~6. Select **More**.~~



~~7. Select **Edit Skills**.~~



~~8. Select the skill or skills from the list and enter "10" in the Rating field (0=not added to the queue, 10=added to the queue).~~



~~9. Select **Apply**.~~

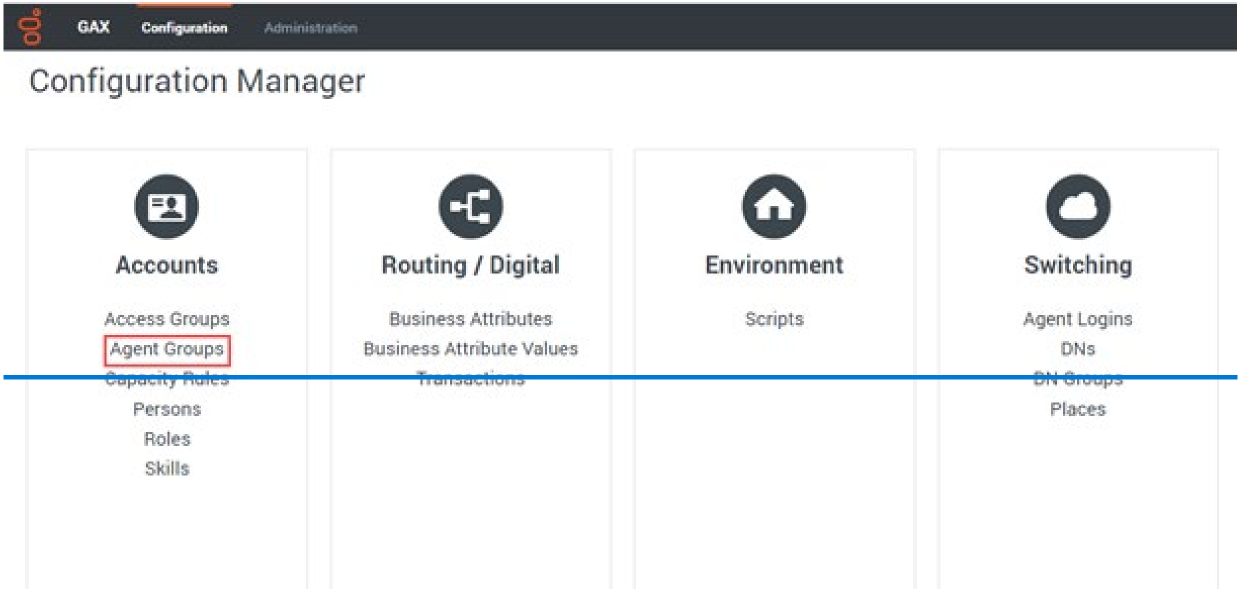
~~8.1.5 Adding an Agent to an Agent Group~~

~~(Video instructions available: Adding an Agent to an Agent Group)~~

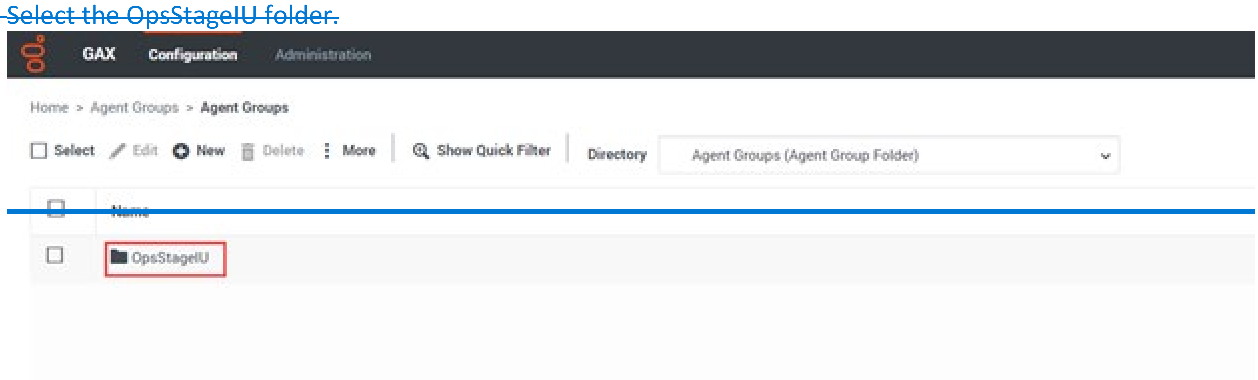
~~Agent groups are used to group agents with similar skill sets together. These help for reporting purposes such as for separating different job duties such as LTC and workers who process overpayments. If a queue has voicemail, agents within the group can access the voicemails. Functionalities such as what the agent will first see when they log in to Genesys depends on their agent group.~~

~~To add an agent to an agent group:~~

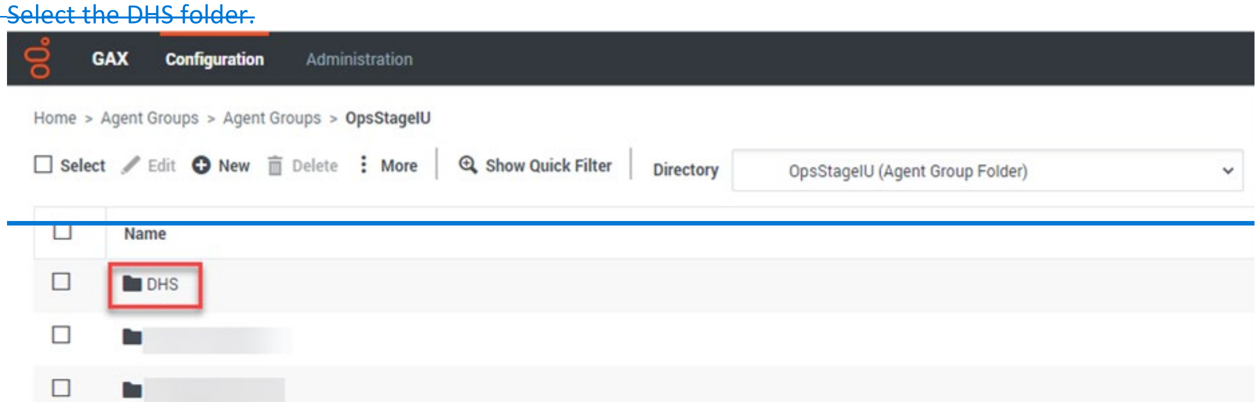
~~1. Select the Agent Groups link on the Configuration Manager page.~~



~~2. Select the OpsStageIU folder.~~



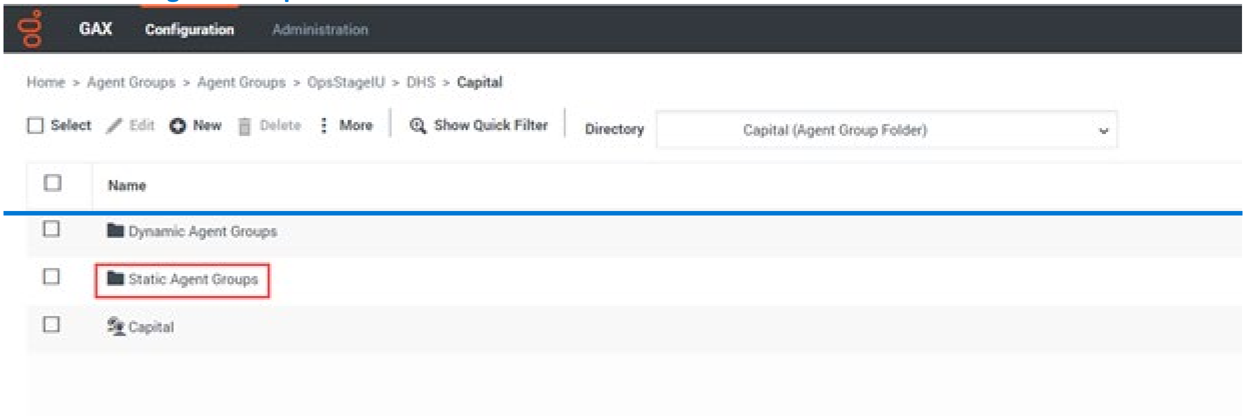
~~3. Select the DHS folder.~~



~~4. Select the DMS folder or the consortium folder the agent is in (Capital, Northern, Milwaukee, etc.).~~

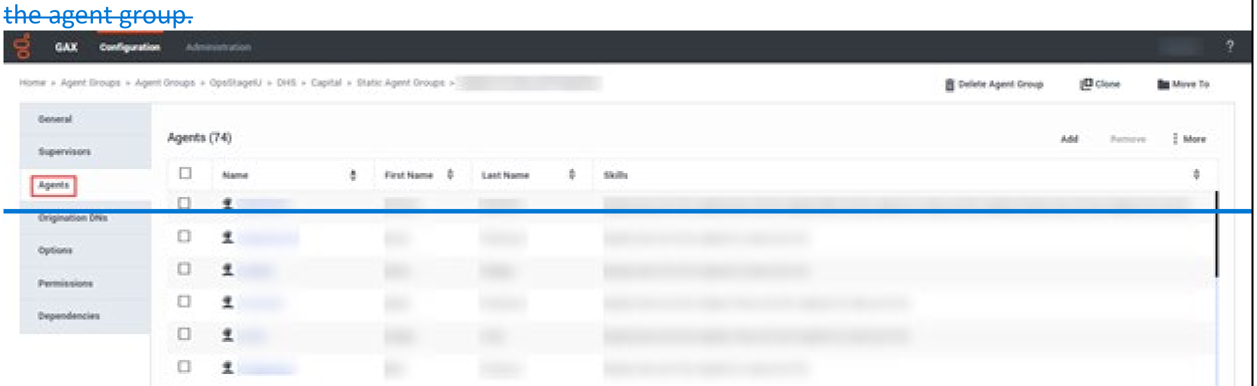
~~**Note:**~~ ~~All other lines of business not related to Income Maintenance are in the DMS folder.~~

~~5. Select **Static Agent Groups**.~~

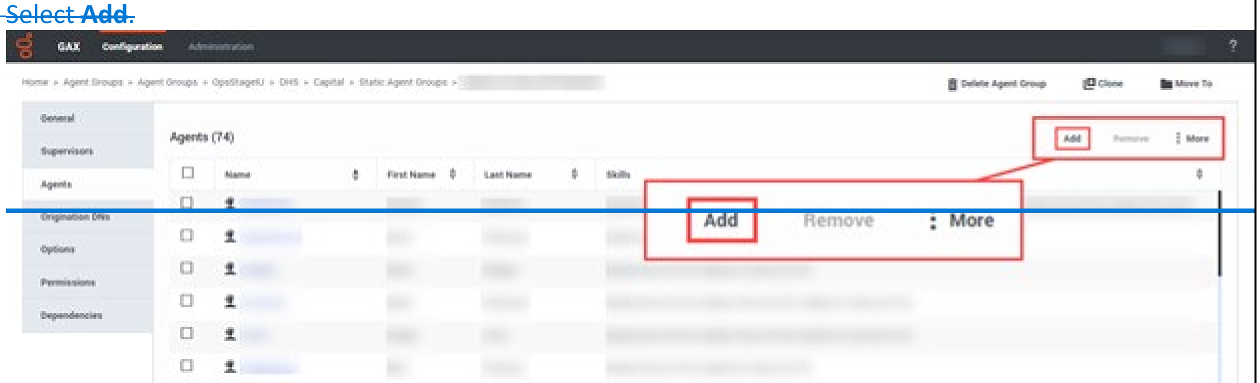


~~6. Select the agent group from the list.~~

~~7. Select **Agents** on the left-hand list. Once selected, there is a list of the agents currently assigned to the agent group.~~

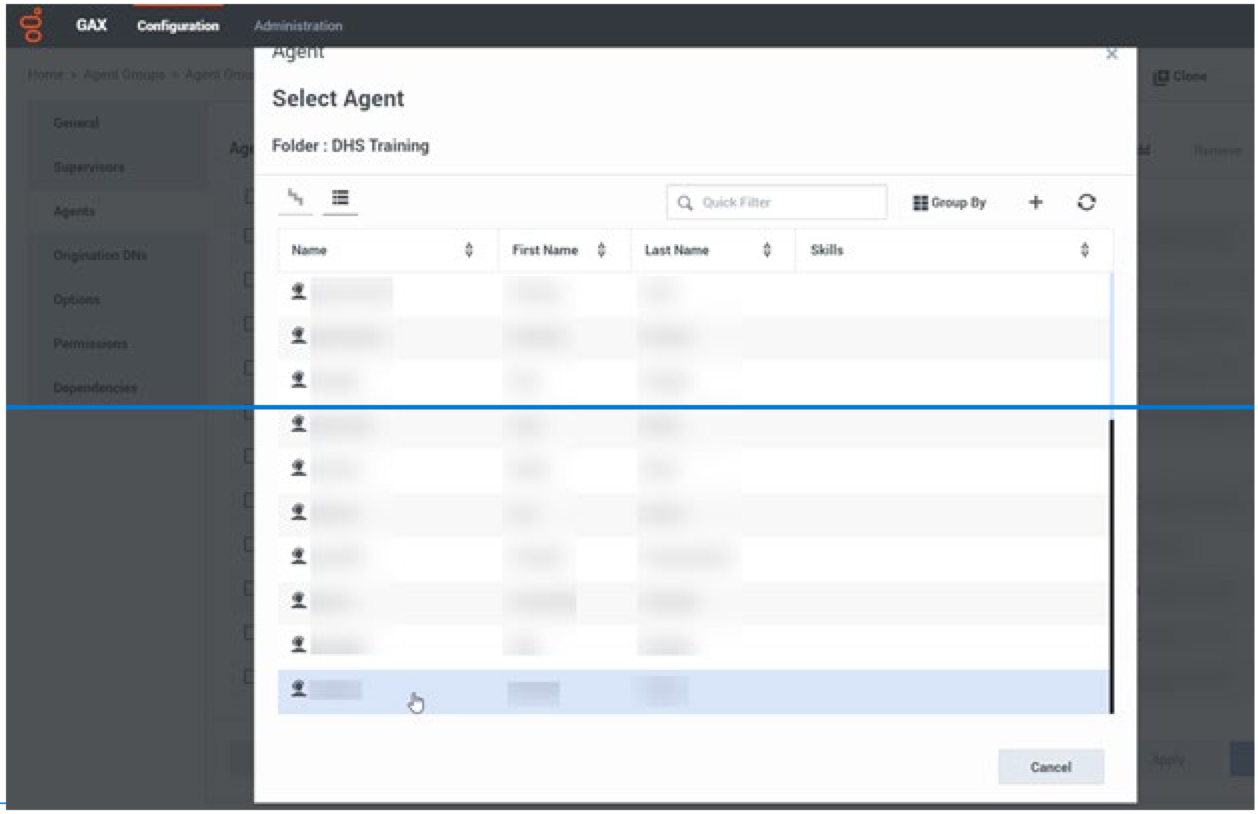


~~8. Select **Add**.~~



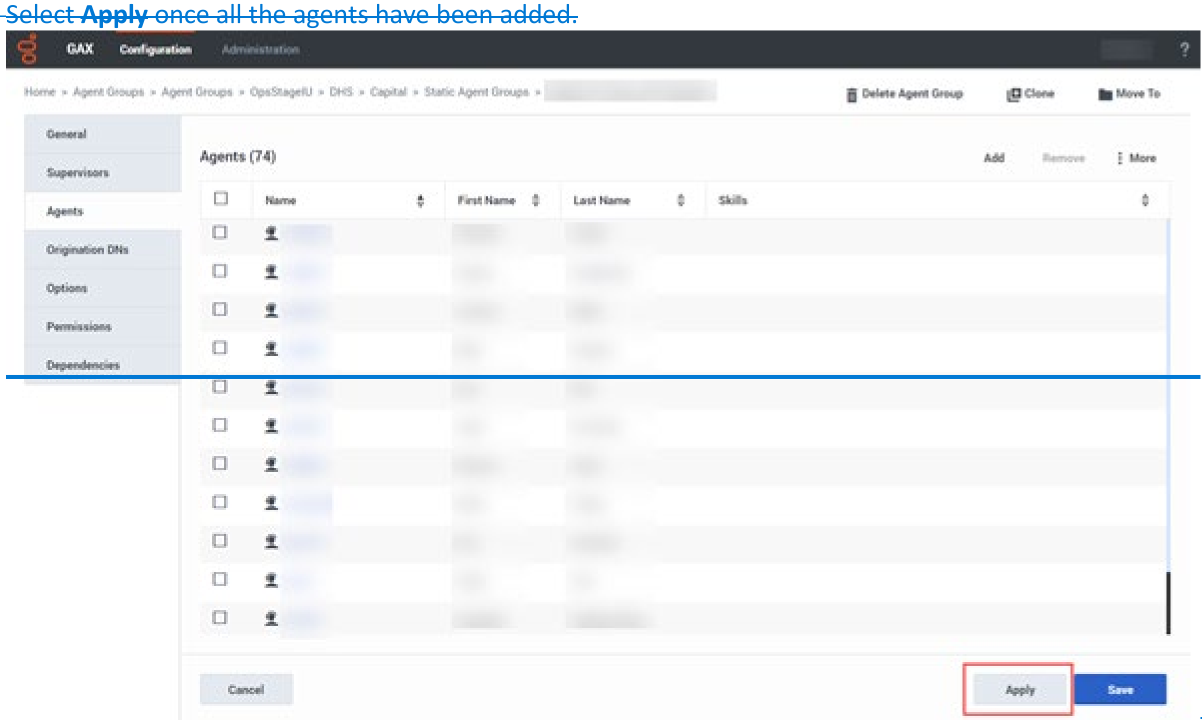
~~9. Select the consortium folder the agent is in and then select the agent. Add any other agents to the agent group if applicable.~~

~~**Note:**~~ ~~Only one agent can be added to an agent group at a time.~~



~~10.~~

~~11. Select **Apply** once all the agents have been added.~~



~~**Note:**~~	~~Remove agents from an agent group by selecting the check box next to their name and select **Remove**.~~

~~8.1.6 Adding or Removing a Supervisor from a Static Agent Group~~

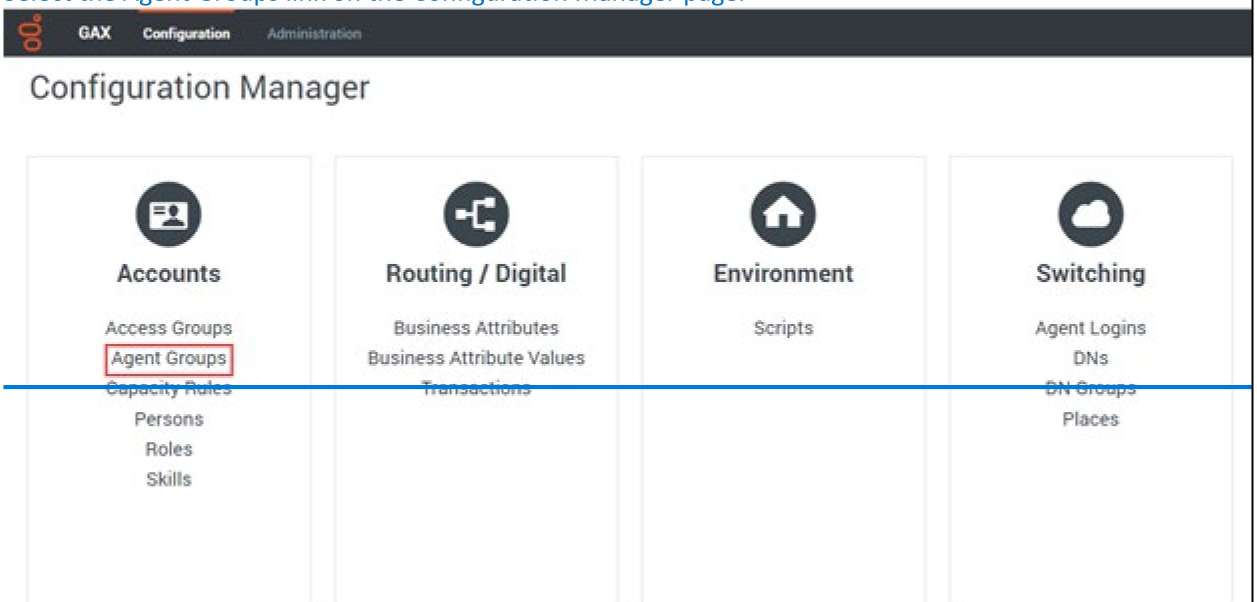
~~Adding a user as a supervisor in a static agent group allows the individual to monitor or listen to calls for any agent in that agent group.~~

~~*8.1.6.1 Adding a Supervisor to a Static Agent Group*~~

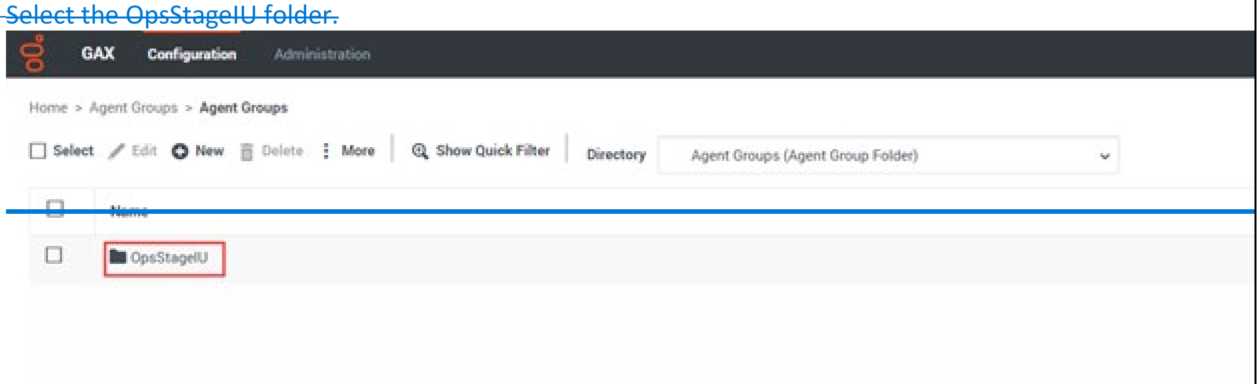
~~(Video instructions available: Adding a Supervisor to a Static Agent Group)~~

~~To add a supervisor to a static agent group:~~

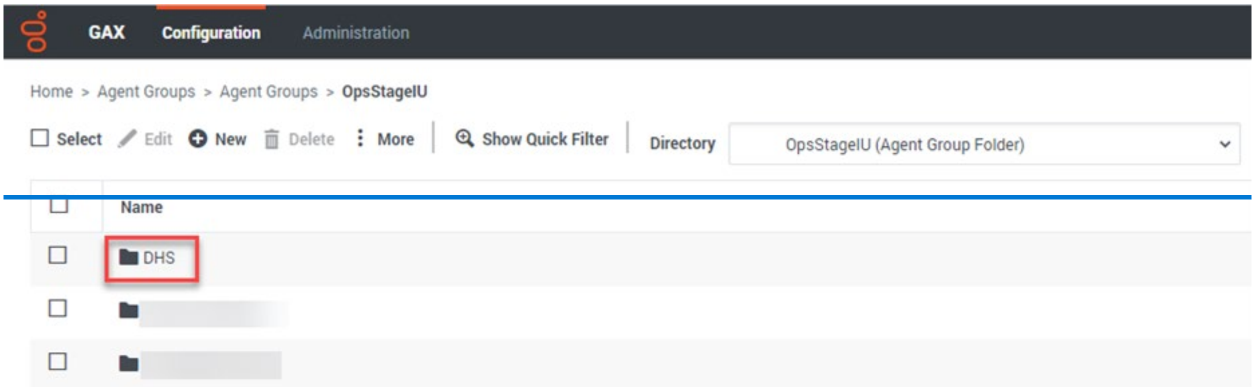
1. ~~Select the Agent Groups link on the Configuration Manager page.~~



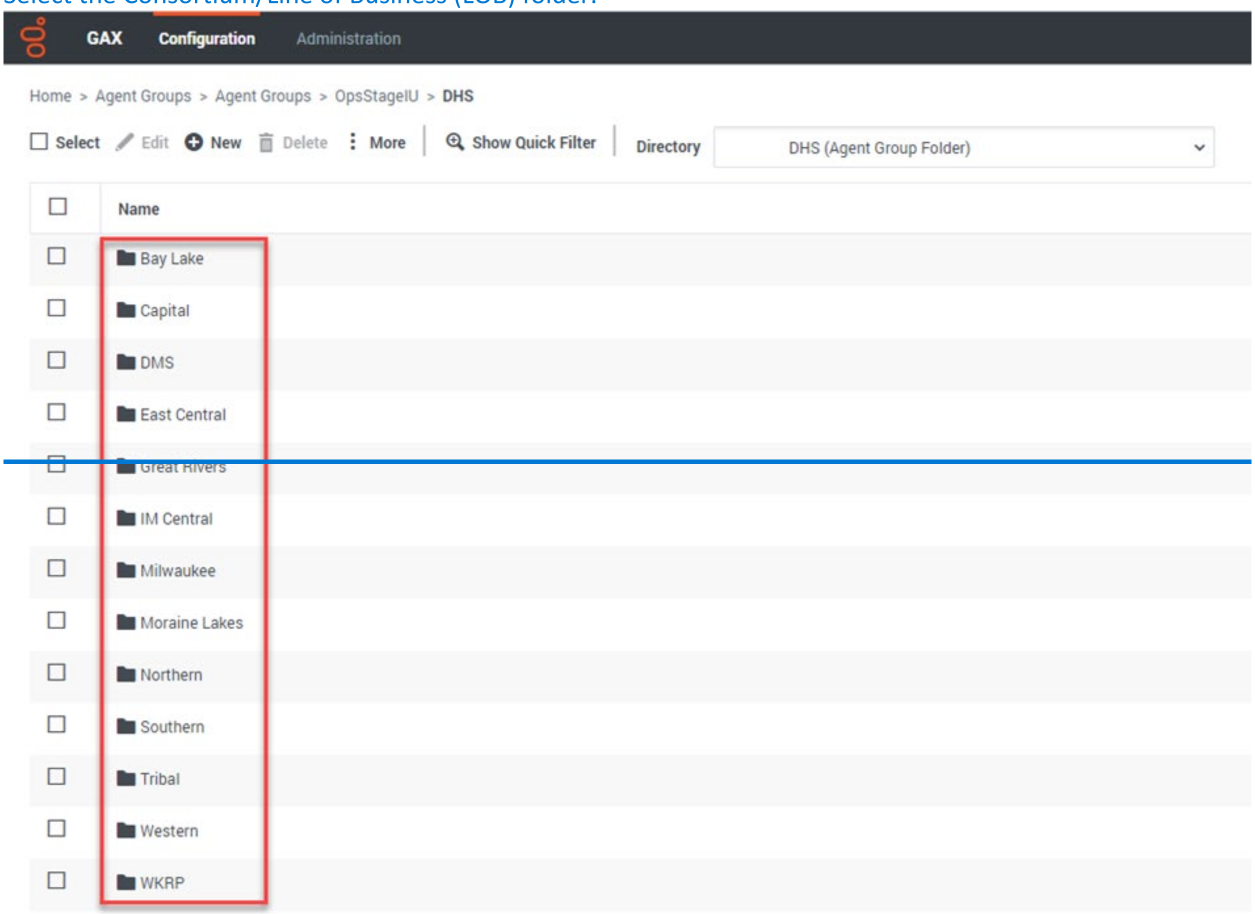
2. ~~Select the OpsStageIU folder.~~



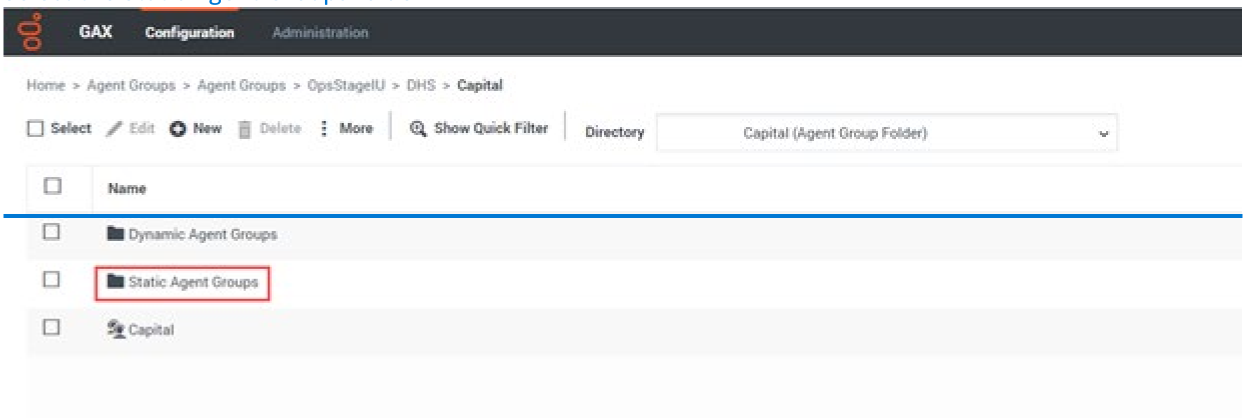
~~3. Select the DHS folder.~~



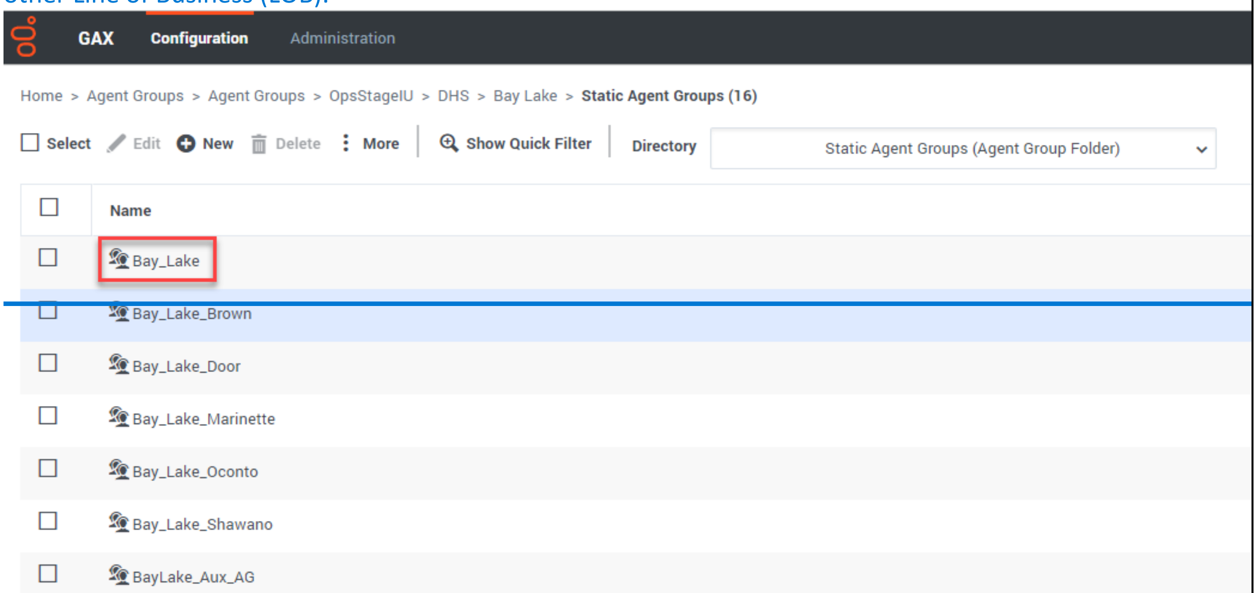
~~4. Select the Consortium/Line of Business (LOB) folder.~~



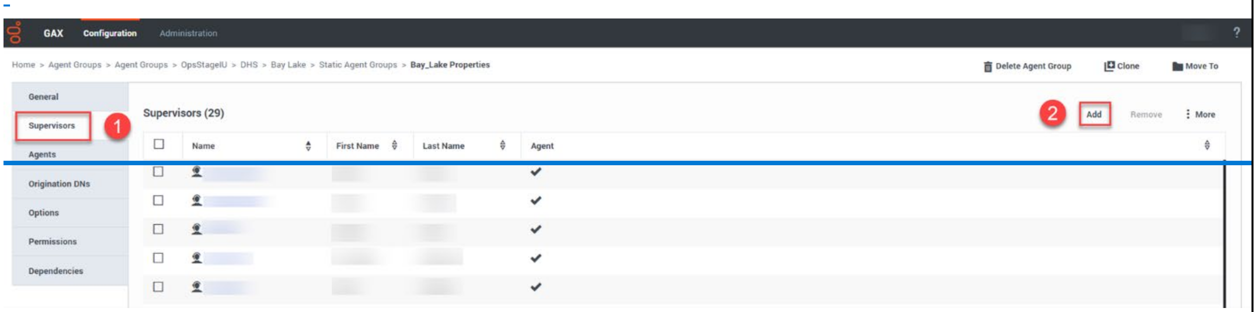
5. ~~Select the Static Agent Groups folder.~~



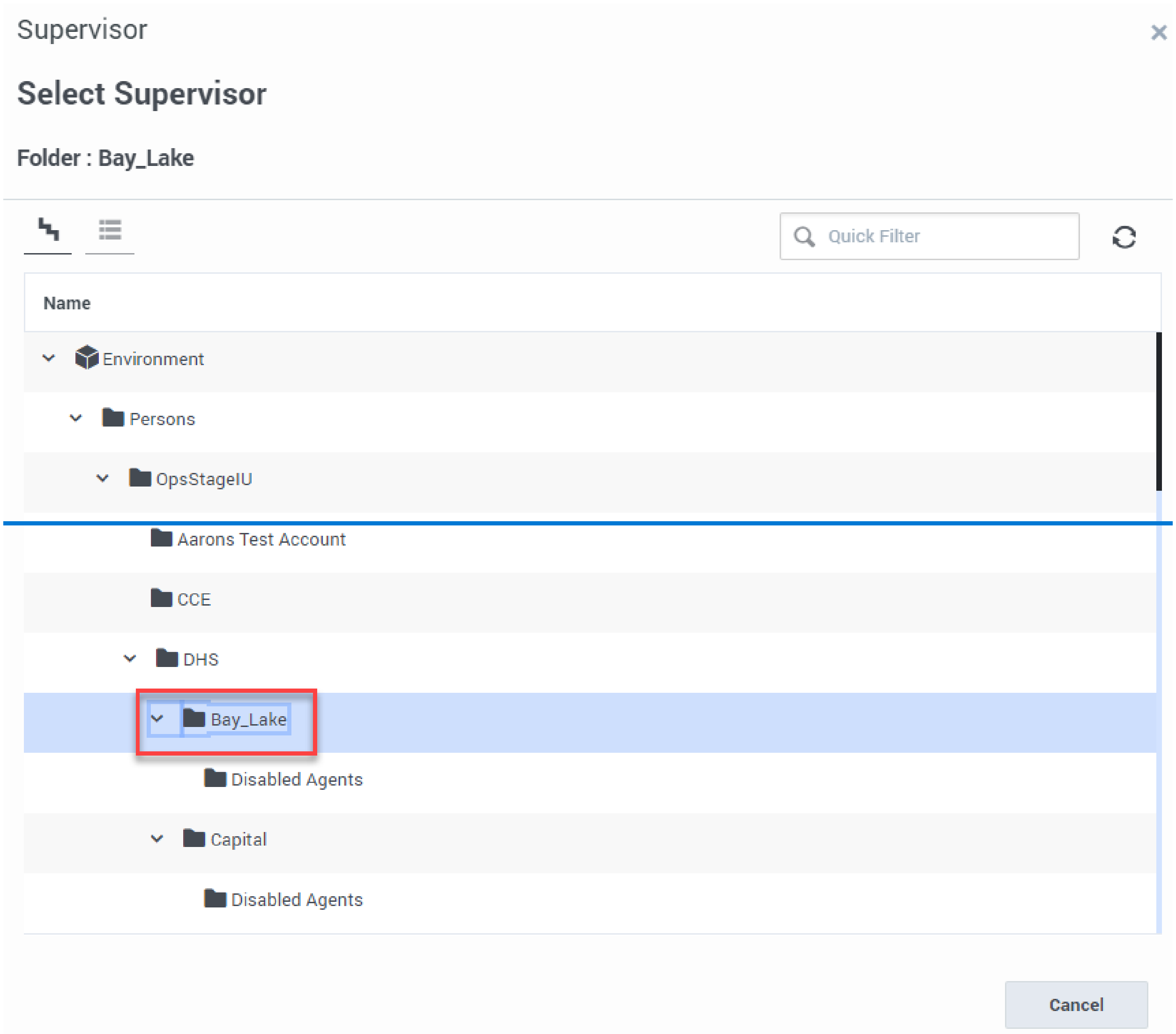
6. ~~Select the umbrella group. The umbrella agent group should include all agents in the consortium or other Line of Business (LOB).~~



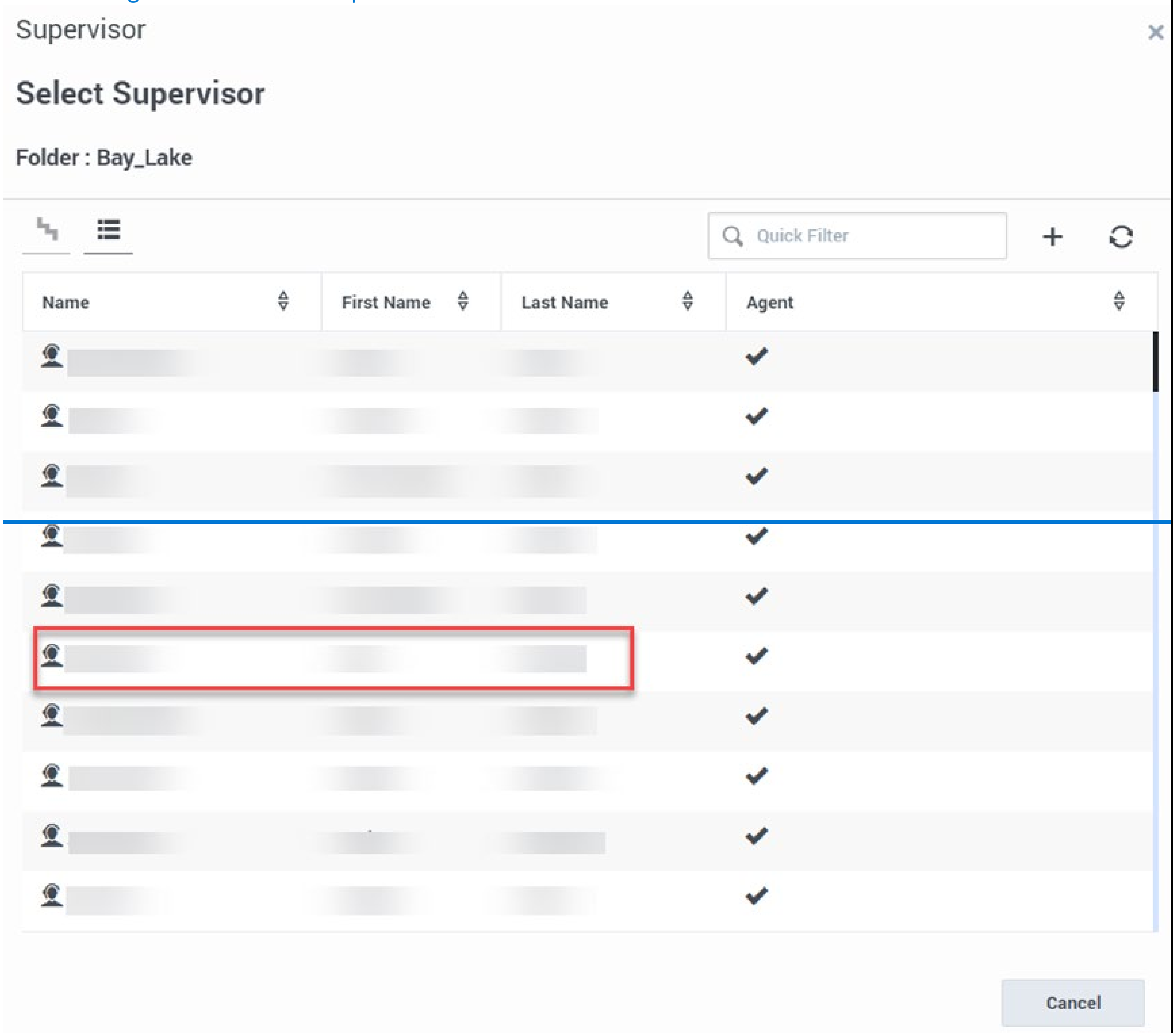
7. ~~Select the Supervisors tab on the left, and then click **Add** on the right.~~



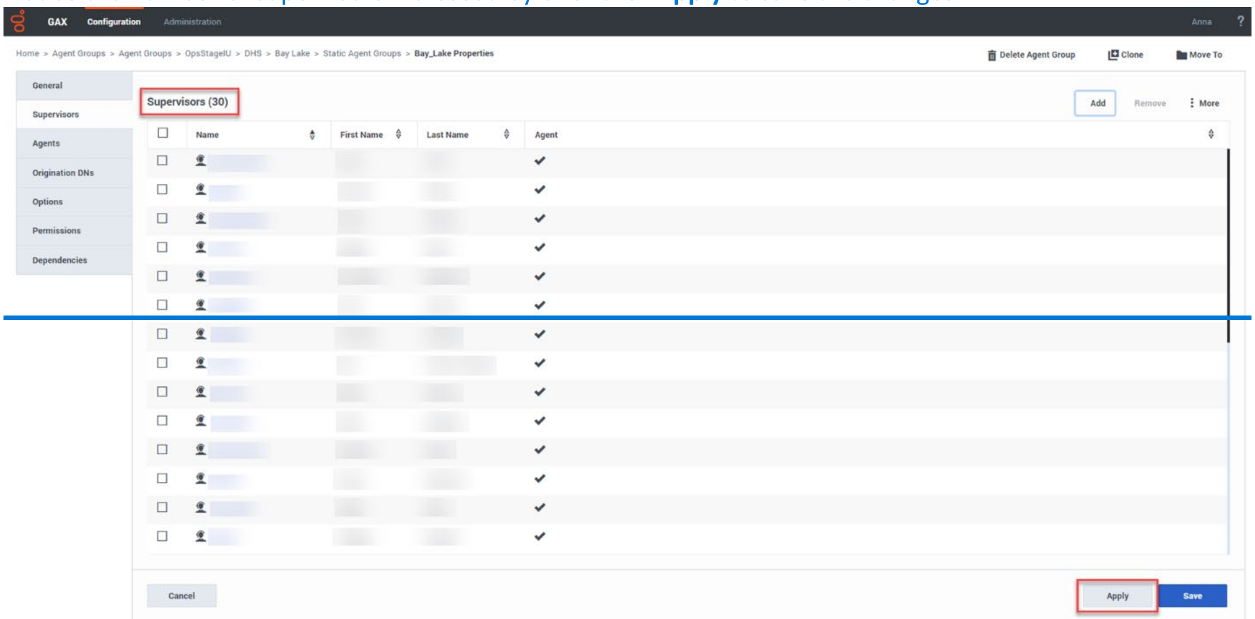
~~8. Scroll through the list to find the consortium you want to add the supervisor to, and select that consortium's folder.~~



~~9. Select the agent to be made a supervisor.~~



~~10. Notice the number of supervisors increased by one. Click **Apply** to save the changes.~~



~~8.1.6.2 Removing a Supervisor from a Static Agent Group~~

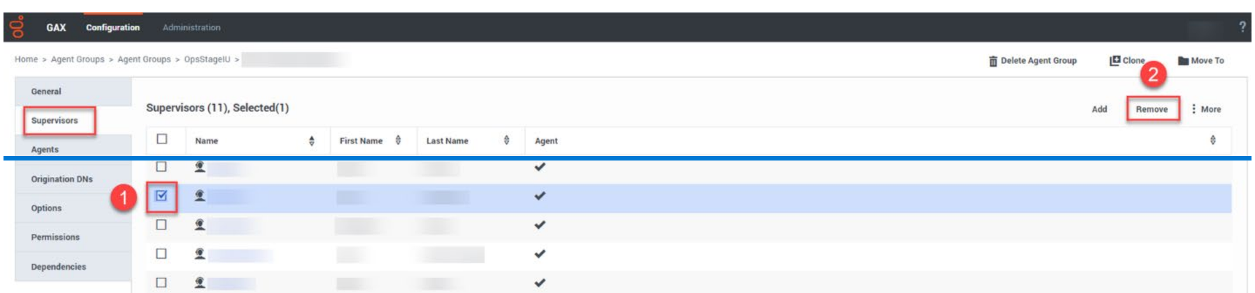
~~(Video instructions available: Removing a Supervisor from a Static Agent Group)~~

~~To remove a supervisor from a static agent group:~~

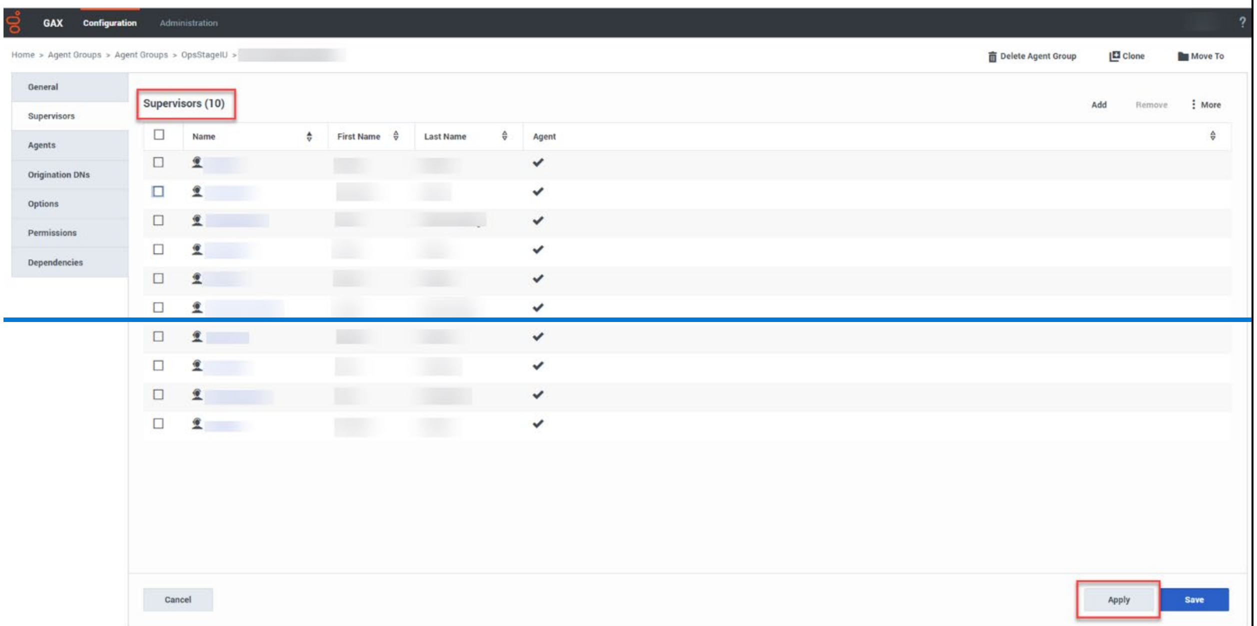
1. ~~Follow instructions one through six found in Section 8.1.6.1 Adding a Supervisor to a Static Agent Group.~~
2. ~~From the Supervisors tab, check the checkbox next to the name of the Supervisor to be removed, and click **Remove**.~~

~~**Note**~~	~~Be sure to select the appropriate agent group.~~

~~3.~~



4. ~~Notice the number of Supervisors decreased by one. Click **Apply** to save the changes.~~



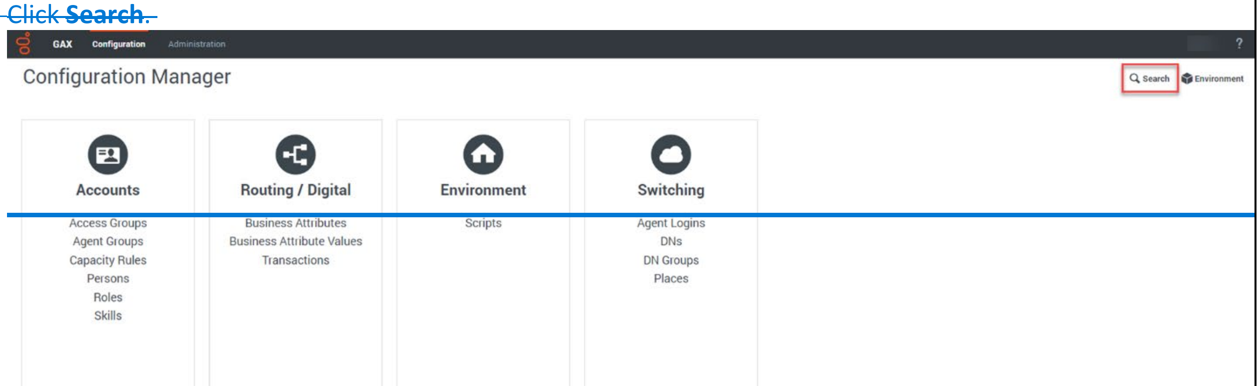
~~8.1.7 Quick Agent Search in Platform Administration~~

~~(Video instructions available: Quick Agent Search in Platform Administration)~~

~~Searching for an agent can be done different ways. Below is the quickest way to search for an agent.~~

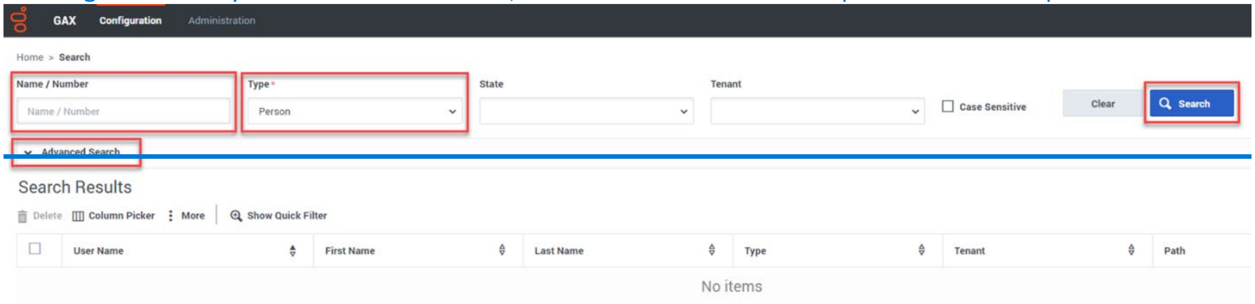
~~To search for an agent from the Configuration Manager home page:~~

1. ~~Click **Search**.~~

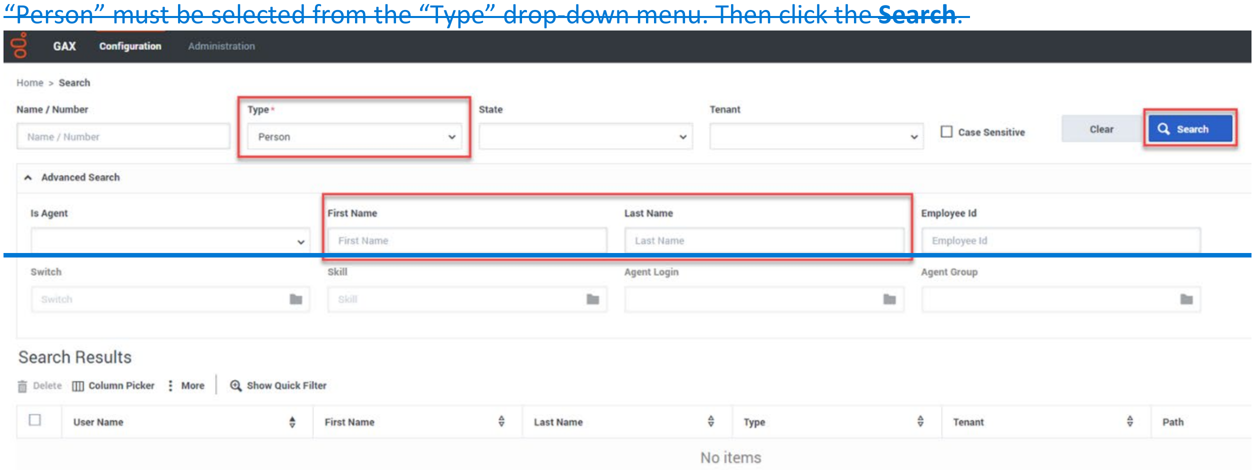


2. ~~Enter the agent's Genesys username in the Name/Number field, and select **Person** from the Type drop-down menu. Click **Search**.~~

~~If the agent's Genesys username is unknown, click **Advanced Search** to expand the search options.~~



~~3. Using the Advanced Search options, search for the agent by their First Name, Last Name, or both. "Person" must be selected from the "Type" drop-down menu. Then click the **Search**.~~



~~**Note**~~	~~Spelling of the Genesys username, first name, and last name must be exact for search results to work properly.~~

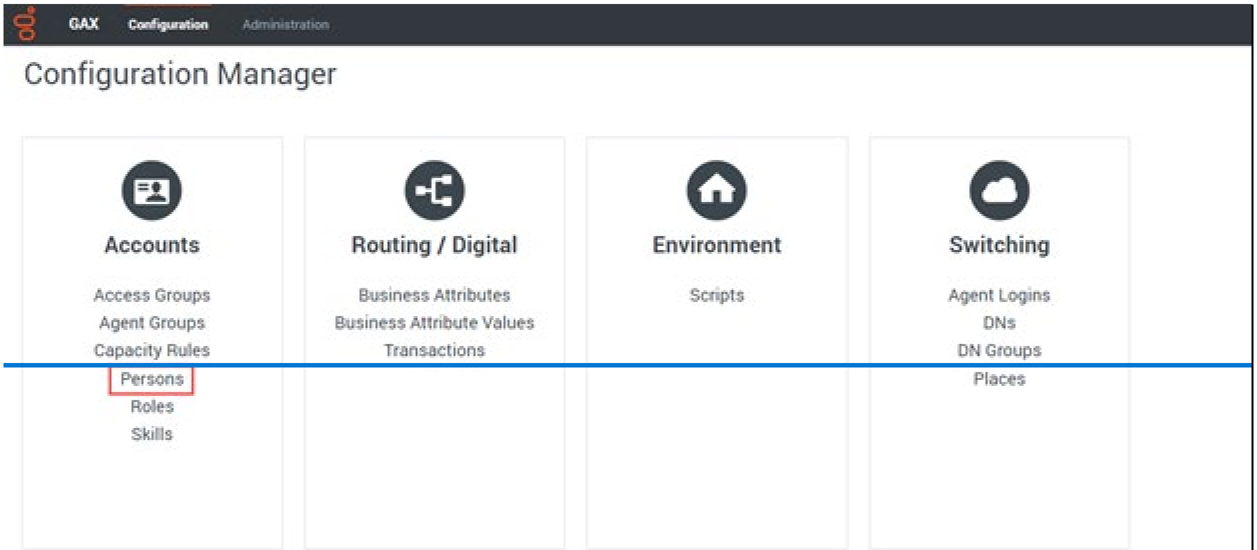
~~8.1.8 Editing General Agent Information~~

~~(Video instructions available: (Video instructions available: Editing General Agent Information)~~

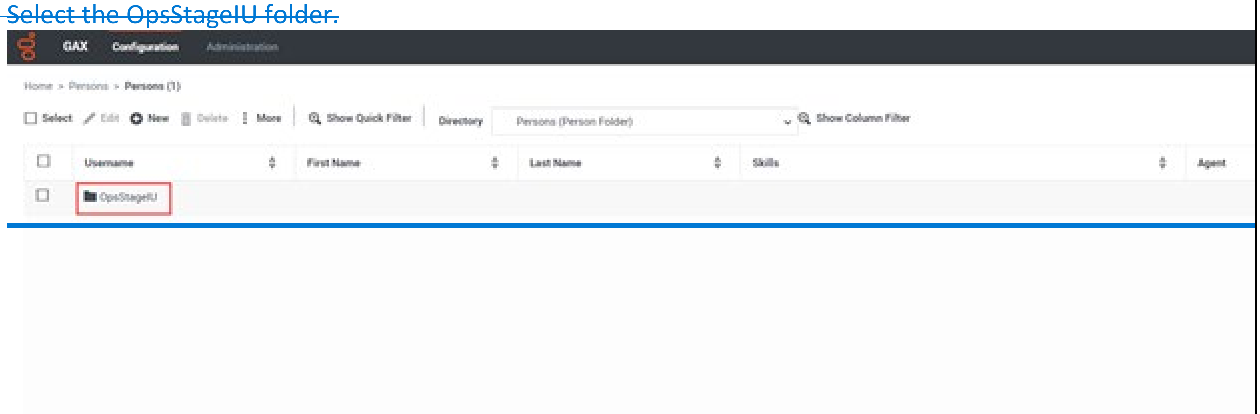
~~To change an agent's username, first name, last name, email address, password, or external ID follow the steps below:~~

~~1. Select the Persons link on the Configuration Manager home page.~~

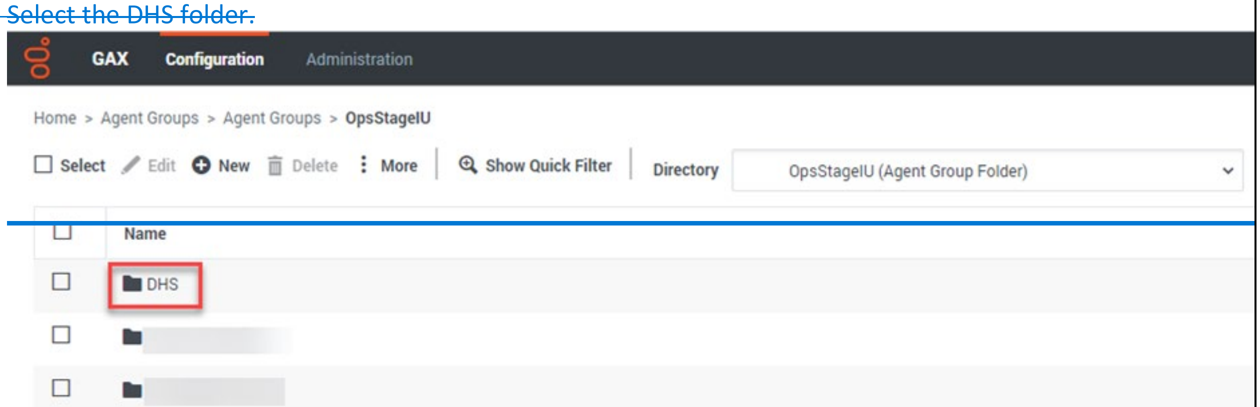
~~**Note**~~	~~To conduct a quick search of an agent, see Section 8.1.7 Quick Agent Search in Platform Administration, then proceed with step number five.~~



~~2. Select the OpsStageIU folder.~~

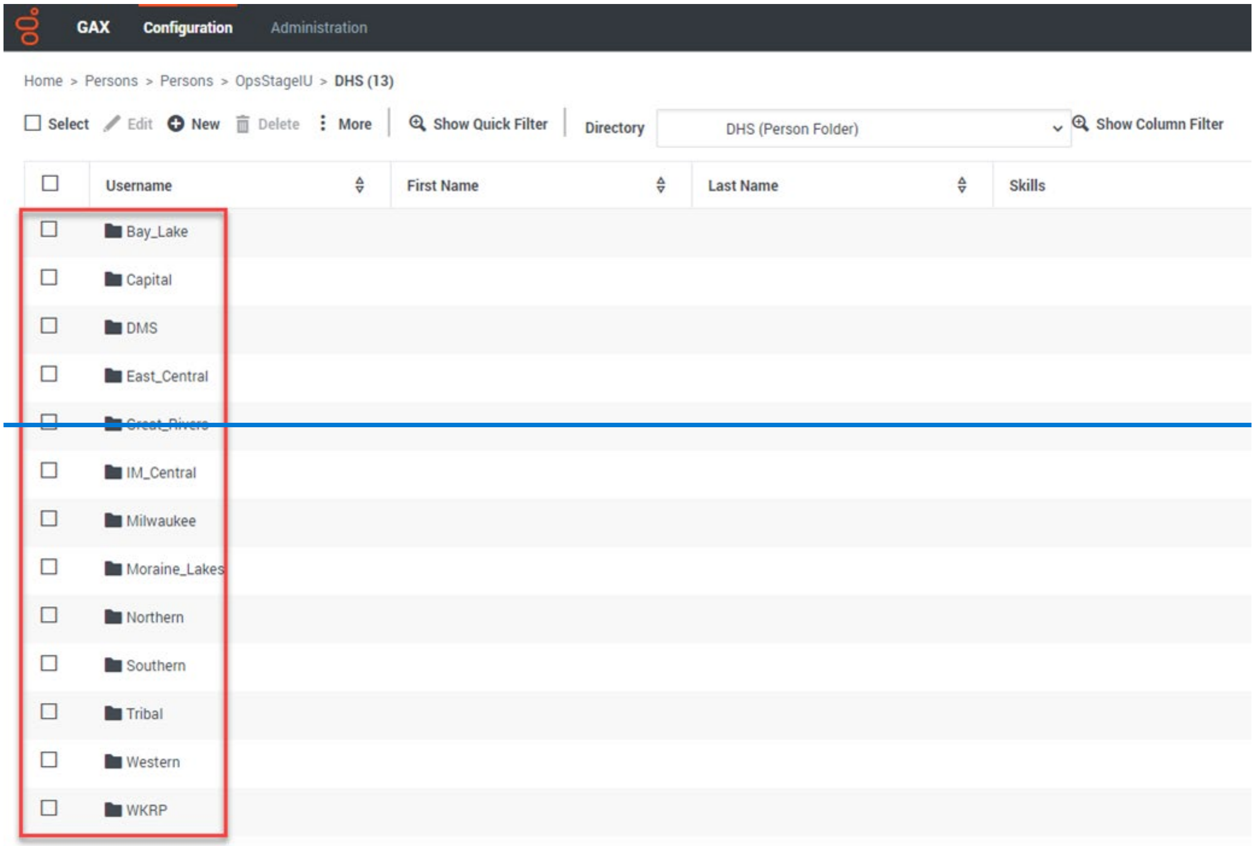


~~3. Select the DHS folder.~~

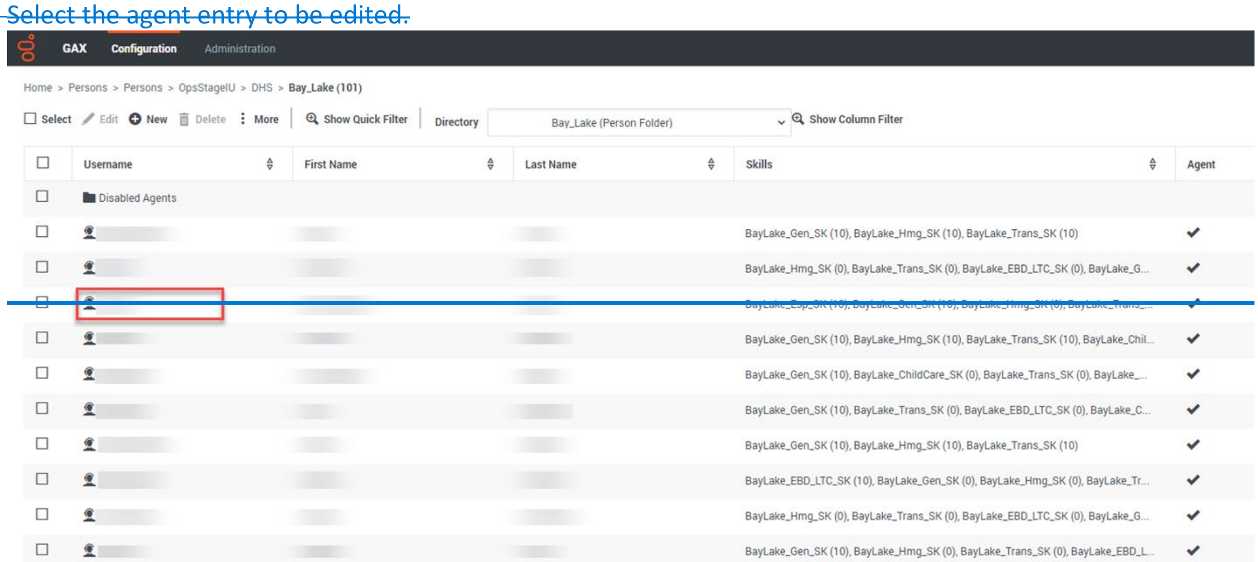


~~4. Select the DMS folder or the consortium folder the agent is in (Capital, Northern, Milwaukee, etc.).~~

~~**Note**~~	~~All other lines of business not related to Income Maintenance are in the DMS folder.~~



~~5. Select the agent entry to be edited.~~



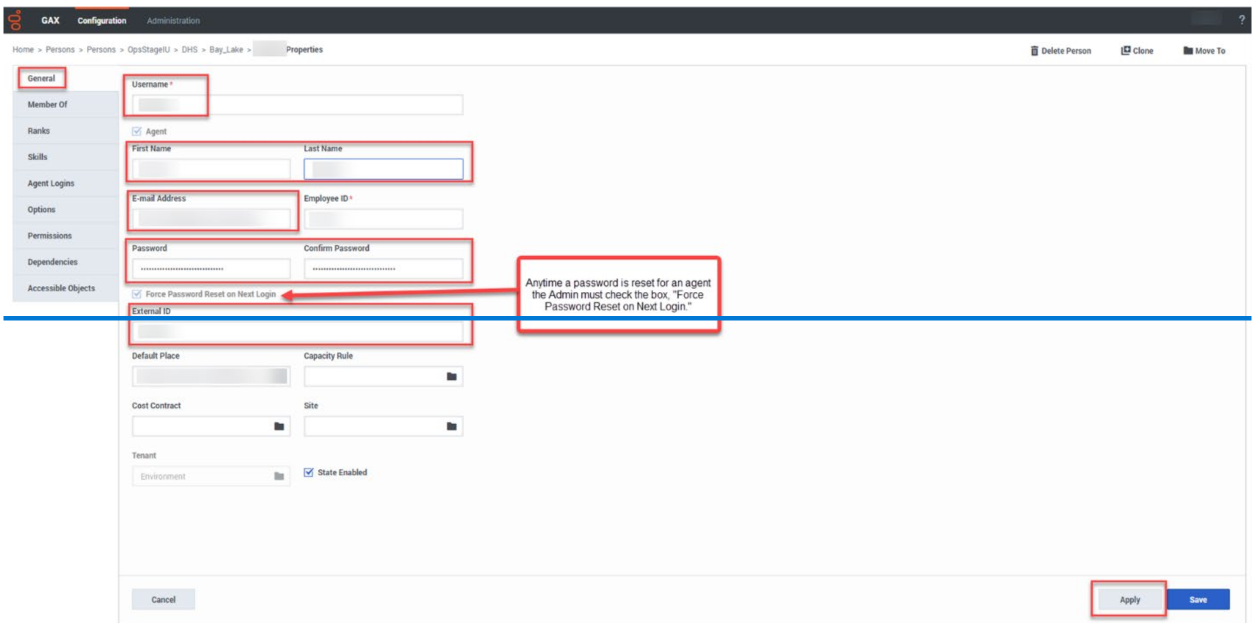
~~6. From the General tab, edits can be made only to the following fields:~~

- ~~Username~~
- ~~First Name and Last Name~~
- ~~Email Address~~
- ~~Password and Confirm Password~~
- ~~External ID~~

~~The Username is the local username and is case sensitive. The External ID is the agent's WAMS ID. The External ID and Local ID must always match. Before changing the External ID in Configuration Manager the agent first needs to go through the necessary steps to change their WAMS ID, see Section 2.3 Forgotten Credentials.~~

~~Any changes made to the agent's password will reset their local password, not their WAMS password. Enter the password in both fields and check the checkbox, "Force Password Reset on Next Login." Provide the agent with the newly created temporary password and inform them the temporary password is only valid the first time they log in. The first time the agent logs in with the temporary password they will be forced to create a new password of their choice. See Section 10.1 Setting a Local Password for specific instructions on how to set a local password.~~

~~**Note**~~	~~Do not touch the Employee ID, this is assigned individually to each agent by the system when their profile is created. All other fields not mentioned above **must** be left untouched.~~



7. ~~After making desired changes, click **Apply**.~~

~~8.2 Business Controls~~

~~8.2.1 Logging in for Business Controls (Video instructions available: Logging in for Business Controls)~~

~~8.2.2 Emergency Flags (Video instructions available: Emergency Flags)~~

~~This section discusses business controls such as setting and changing agency hours.~~

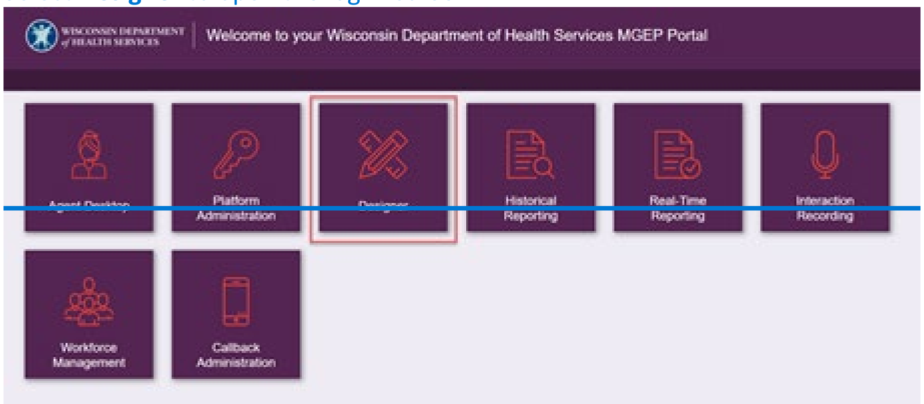
~~8.2.1 Logging in for Business Controls~~

~~(Video instructions available: Logging in for Business Controls)~~

~~All tasks specific for managing business controls take place in Designer. To log in:~~

1. ~~Open the Genesys Portal with Firefox, Edge, or Chrome.~~

~~2. Select **Designer** to open the log in screen.~~

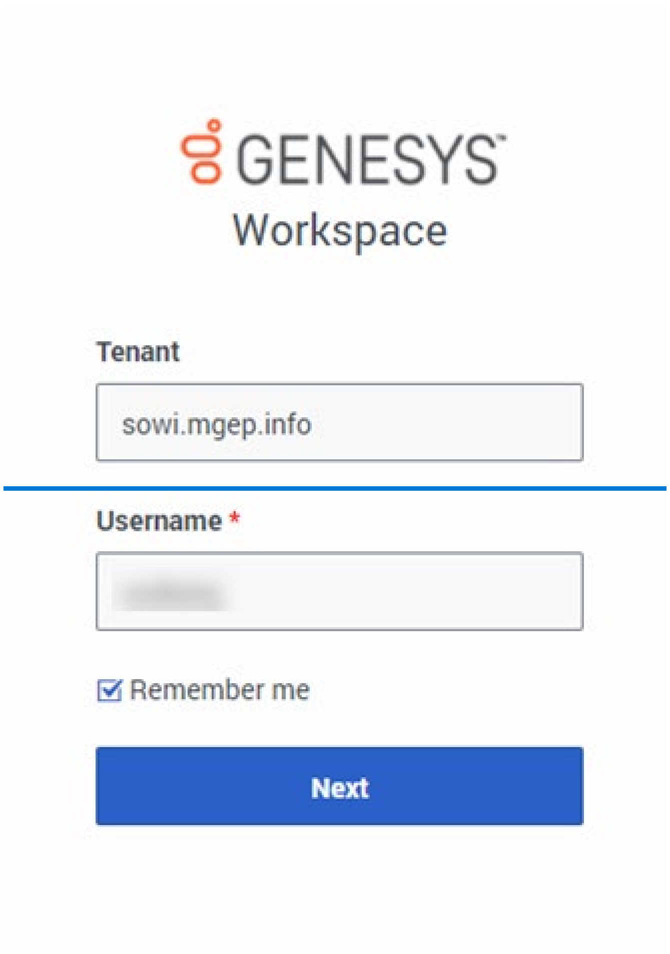


~~3. Complete the Tenant and Username fields with:~~

~~1. Tenant: Enter sowi.mgep.info~~

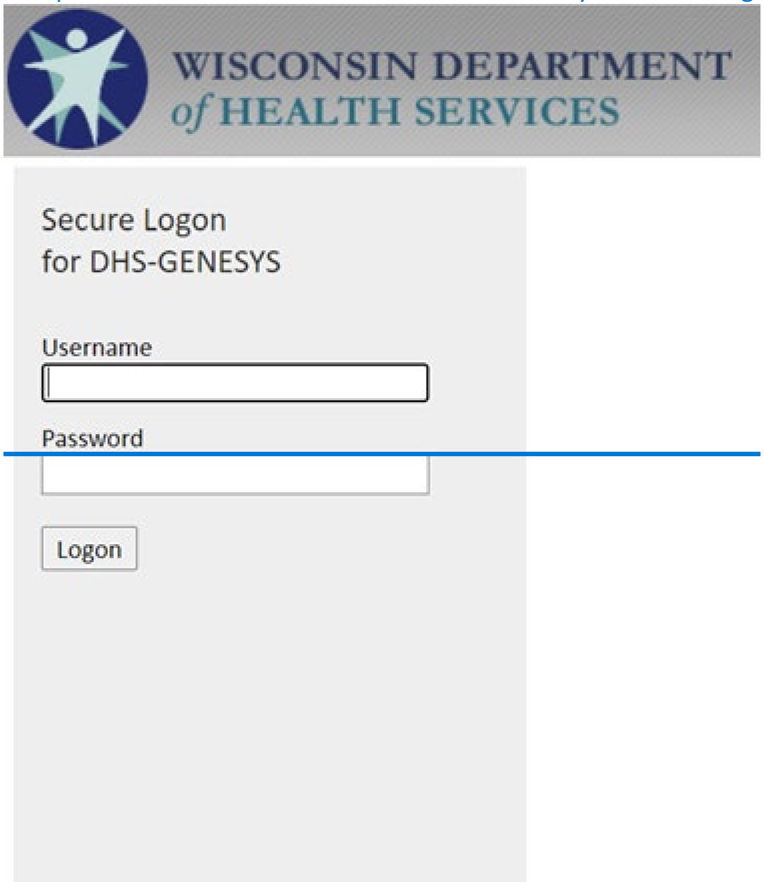
~~2. Username: Enter your WAMS ID~~

~~**Note:**~~	~~You will use the same Tenant text each time you log in.~~

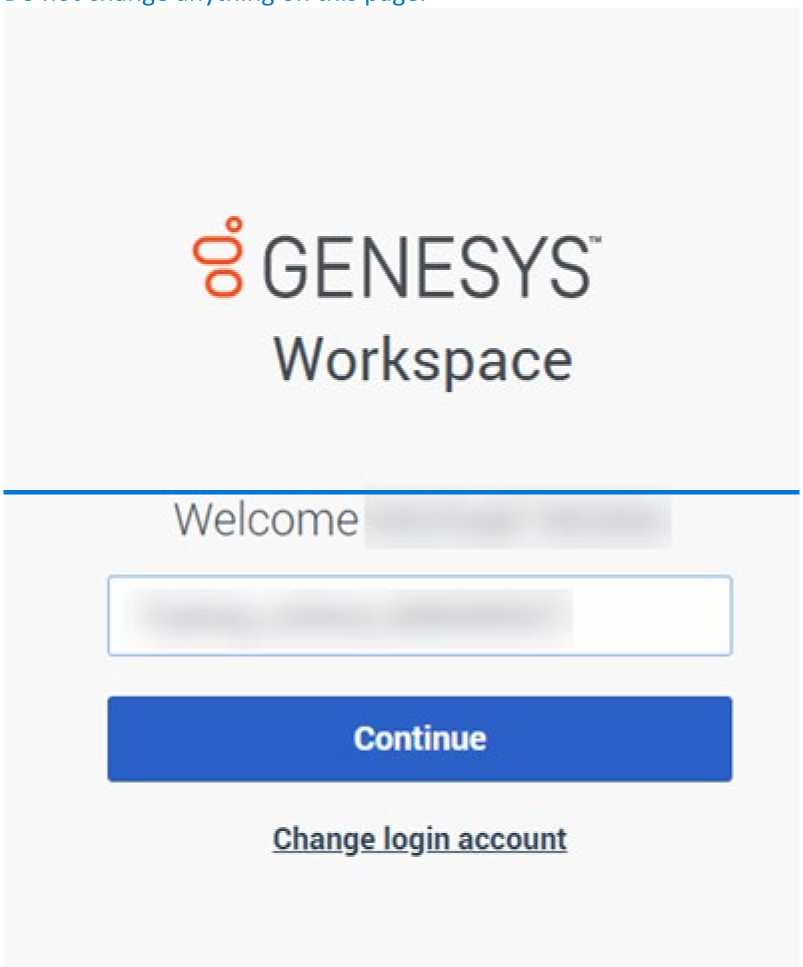


~~4. Select **Next**.~~

~~5. Complete the Username and Password fields with your WAMS log-in information.~~



6. ~~Select **Continue** on the place screen. This page is prepopulated with the agent's phone number. Do not change anything on this page.~~



7. ~~The Applications page displays. Select the business controls tab.~~

~~Emergency flags are the only business controls used.~~

~~8.2.2 Emergency Flags~~

~~(Video instructions available: Emergency Flags)~~

~~Emergency flags can temporarily change the call center call flow to notify callers of the call center's status and can also close the call center. For example, if there are high call volumes or technical issues, an automated message describes the situation to the caller.~~

~~Emergency flags are not created by segment administrators but are turned on and off by segment administrators.~~

~~To change the status, toggle the button. The status remains activated (green) until it is turned off.~~

~~9 Reporting~~

~~This section describes how to use real-time reporting to monitor agent and queue activity. Future updates will include the use of historical data.~~

~~9.1 Real-time Reporting Overview~~

~~9.1.1 Logging in to Access Real Time Reporting (Video instructions available: Logging in to Access Real Time Reporting)~~

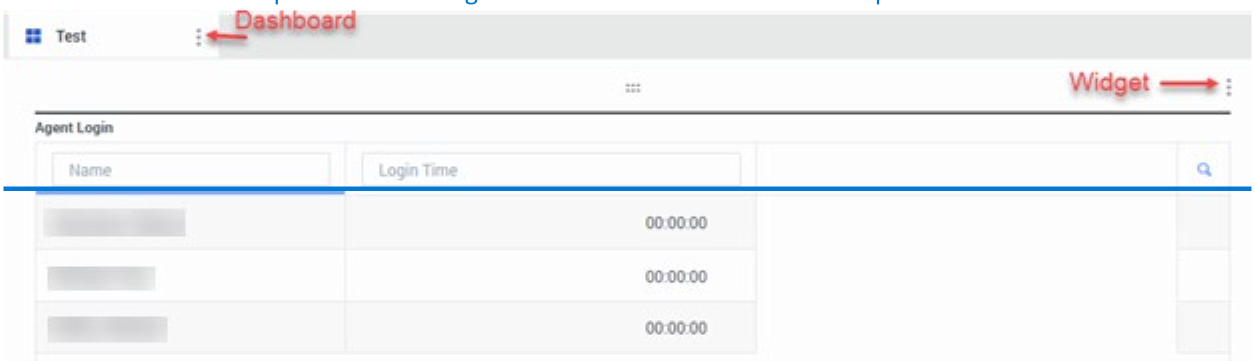
~~9.1.2 Dashboards (Video instructions available: Viewing a Public Dashboard)~~

~~9.1.3 Editing Widgets (Video instructions available: Editing Widgets)~~

~~9.1.4 Sharing a Dashboard (Video instructions available: Sharing a Dashboard)~~

~~Genesys provides real-time reporting through dashboards with up-to-date agent and call data which can be used to monitor agent and queue activity. The information on the dashboards is based on the most current data available in the system.~~

~~Dashboards are made up of editable widgets that contain statistics of the requested information.~~

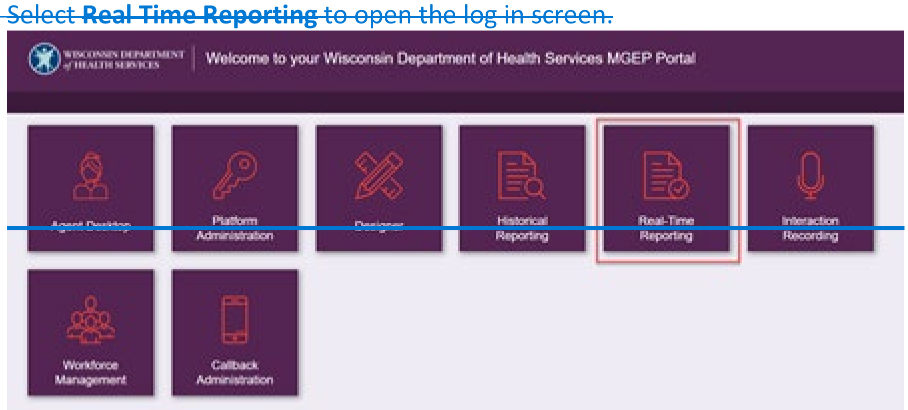


~~9.1.1 Logging in to Access Real Time Reporting~~

~~(Video instructions available: Logging in to Access Real Time Reporting)~~

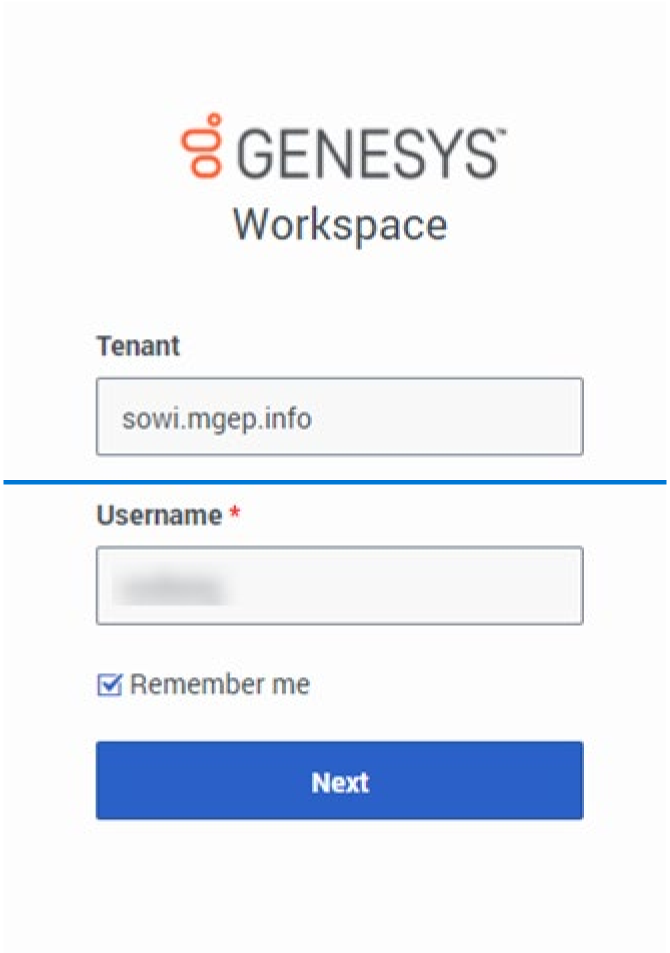
~~To access real-time reporting:~~

1. ~~Open the Genesys Portal with Firefox, Edge, or Chrome.~~
2. ~~Select **Real Time Reporting** to open the log in screen.~~



3. ~~Complete the Tenant and Username fields with:~~
    1. ~~Tenant: Enter sowi.mgep.info~~
    2. ~~Username: Enter your case sensitive WAMS ID~~

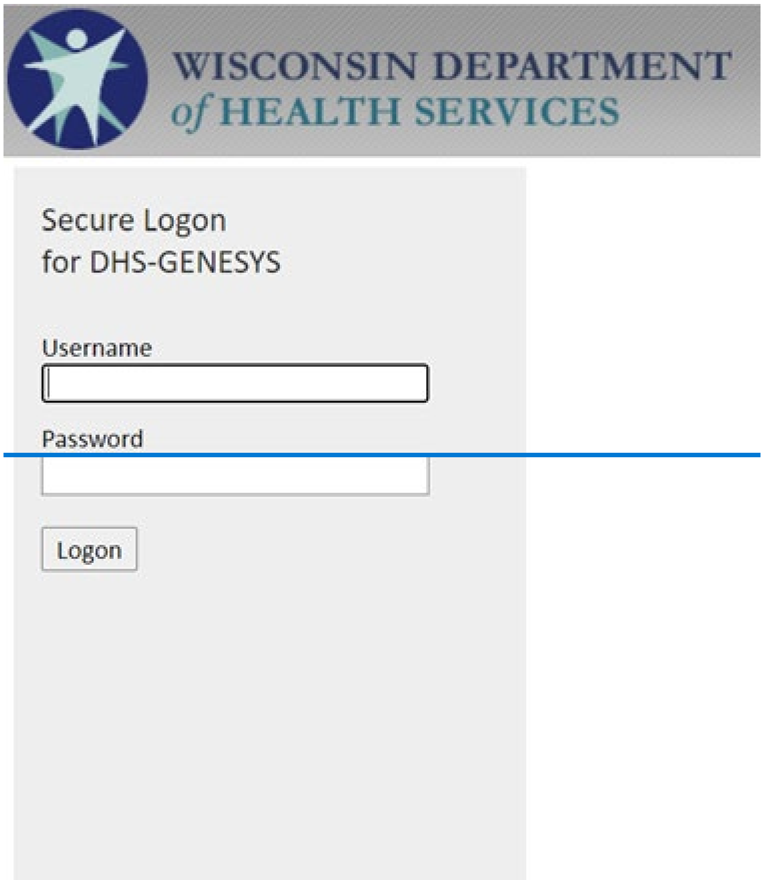
~~**Note** You will use the same Tenant text each time you log in.~~



~~4. Select **Next**.~~

~~5. Enter your WAMS ID and local password and select **Logon**.~~

~~**Note** The local password is set up on initial log in to Genesys (see Section 10.1 Setting a Local Password).~~



6. ~~Select the plus symbol in the upper right corner of the page.~~
7. ~~Select **Dashboard**.~~

~~9.1.2 Dashboards~~

~~(Video instructions available: Viewing a Published Dashboard)~~

~~The dashboard is where the real time statistics are available, including both published widgets and editable widgets provided through Genesys templates.~~

~~Published dashboards are developed by the agency supervisor or administrator and can be shared with others. Other dashboards are developed and loaded specifically for IM agencies. Dashboard templates will automatically populate with widgets once created.~~

~~You can either create a new dashboard by selecting "Blank Dashboard" or find a published dashboard by selecting "Environment."~~

~~To view a published dashboard:~~

1. ~~Select **Environment** and open the folders to find the report to run.~~
2. ~~Select the dashboard name and select **Open**. A popup displays stating that this is a published dashboard. Select **Ok**.~~
3. ~~The dashboard opens.~~
    - ~~Select a widget to re-order the data for that widget from low to high or vice versa. Select the main widget to reset.~~

- ~~Shift the widgets by selecting and dragging.~~

~~Other actions can be completed with a published dashboard by selecting the three dots on the dashboard tab. From here you can:~~

- ~~Add a widget: Add a widget to that dashboard.~~
- ~~Customize: Rename the dashboard and add a description.~~
- ~~Clone: Create an editable copy of the dashboard.~~
- ~~Update Shared Copy: Update the shared copy of the published dashboard so anyone who accesses the dashboard can see this version. Please do not update an existing template.~~
- ~~Save as: Save a copy of the dashboard to change without updating the published dashboard for others.~~
- ~~Download: Download the dashboard in a format that can only be opened in Genesys.~~

~~Selecting the three dots on the top right side of the widget provides more options:~~

- ~~Expand to tab: Expands the widget in another tab to show additional statistics including:~~
  - ~~Time tracking~~
  - ~~Grouped bar~~
  - ~~Stacked bar~~
  - ~~Data (standard way of seeing the statistics)~~
- ~~Edit: Provides all the specific criteria of the widget and customizes it~~
- ~~Clone: Creates an editable copy of the widget.~~
- ~~Delete: Deletes the entire widget.~~
- ~~Download Widget: Downloads the widget in excel format with current point-in-time data.~~

~~9.1.3 Editing Widgets~~

~~(Video instructions available: Editing Widgets)~~

~~To edit a widget, select the three dots in the upper right of the widget and select **Edit**. When editing there are four main tabs to be completed in order which are:~~

1. ~~Objects: Choose the object of the widget by sorting through the folders. Select the checkbox next to the folder. Options available are:~~
   1. ~~Agents~~
   2. ~~Agent Groups~~
   3. ~~Queues~~
2. ~~Statistics: Choose the specific information to be seen in the widget. When selected, the information on that statistic displays in the middle of the window and on the list on the far right. Remove a statistic by unchecking the box.~~
3. ~~Display Options: Choose the format to see the information presented in chart styles.~~
   1. ~~Set up the presentation size of the widget by adjusting the size of the grid.~~
   2. ~~Choose how often the widget is refreshed in real time (every 10 to 60 seconds). The more it refreshes the more it may slow down your computer. Individual statistics will only refresh at that statistic's Notification Frequency.~~
4. ~~Alerts: Create alerts for individual statistics.~~

~~Select **Save** to refresh the widget according to the chosen configurations. The widget may take several minutes to refresh the first time.~~

~~9.1.4 Sharing a Dashboard~~

~~(Video instructions available: Sharing a Dashboard)~~

~~Sharing a dashboard saves a new dashboard and allows the creator to share it with other users.~~

~~To share a new dashboard:~~

1. ~~Select the three dots next to the dashboard name and select **Publish (Enable Sharing)**.~~
2. ~~Enter the name and description of the dashboard.~~
3. ~~Select **Save to Genesys Configuration Server**.~~
4. ~~Choose the folder to store the dashboard in.~~
5. ~~Select **Save**.~~

~~Updating a shared dashboard:~~

1. ~~Select the three dots next to the dashboard~~
    1. ~~Select **Update Shared Copy** and select **Yes** to update the shared copy. This new version of the dashboard is saved in place of the last version.~~
    2. ~~Select **Save As** to save a different version of the published dashboard for personal use.~~
        i. ~~Enter the name and description of the dashboard. The name can be different than the original name.~~
        ii. ~~Choose the folder to store the dashboard in.~~
        iii. ~~Select **Save**.~~

~~**Note**~~	~~Do not update the Genesys templates.~~

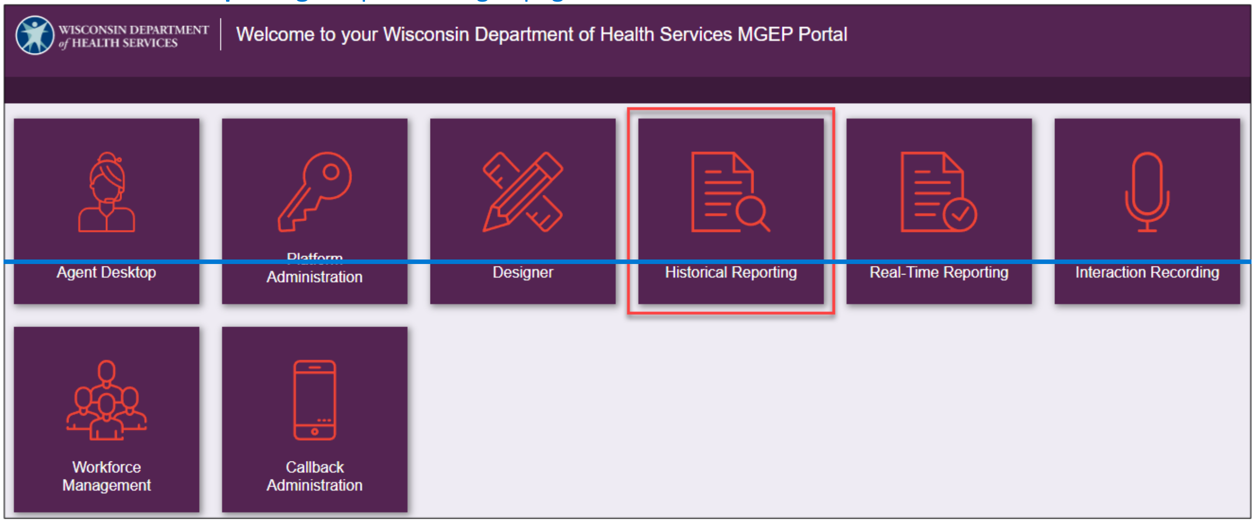
~~9.2 Historical Reporting~~

~~9.2.1 Running Reports~~

~~(Video instructions available: Running Reports)~~

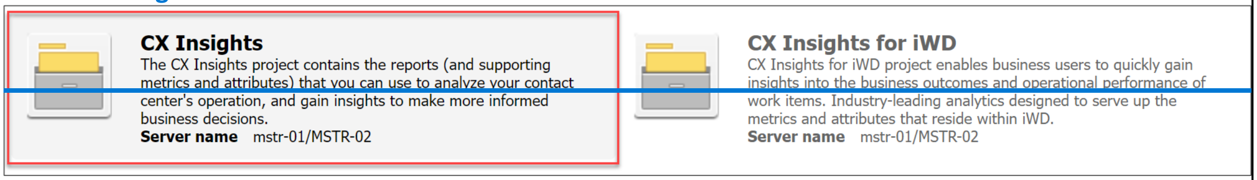
~~All tasks for managing historical reporting take place in Historical Reporting.~~

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

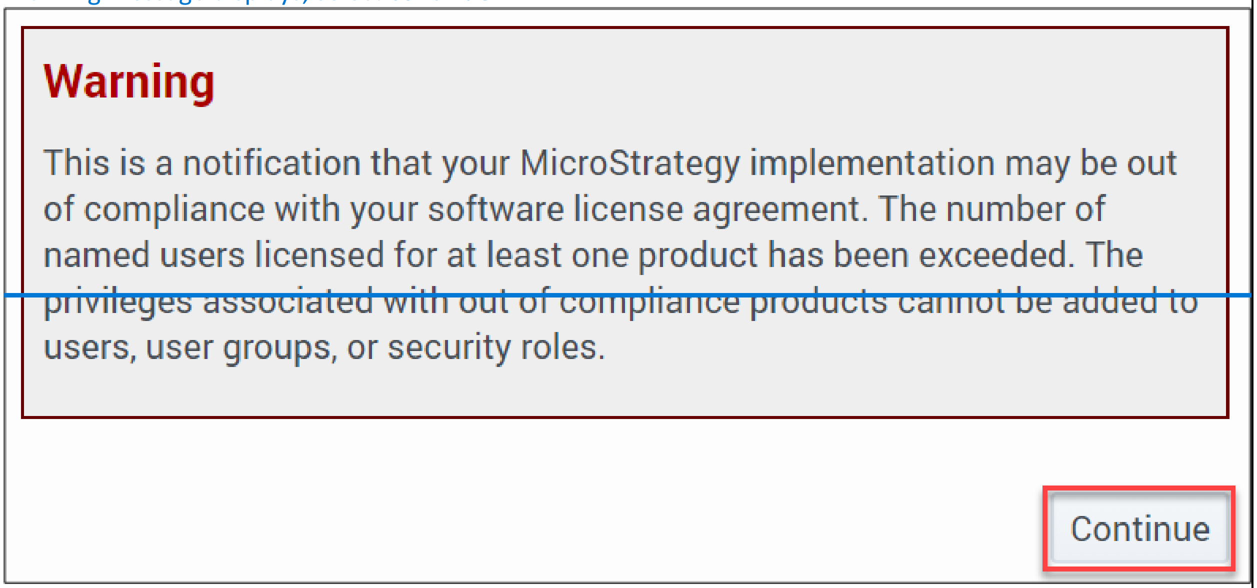


2. ~~Enter the WAMS ID and password.~~

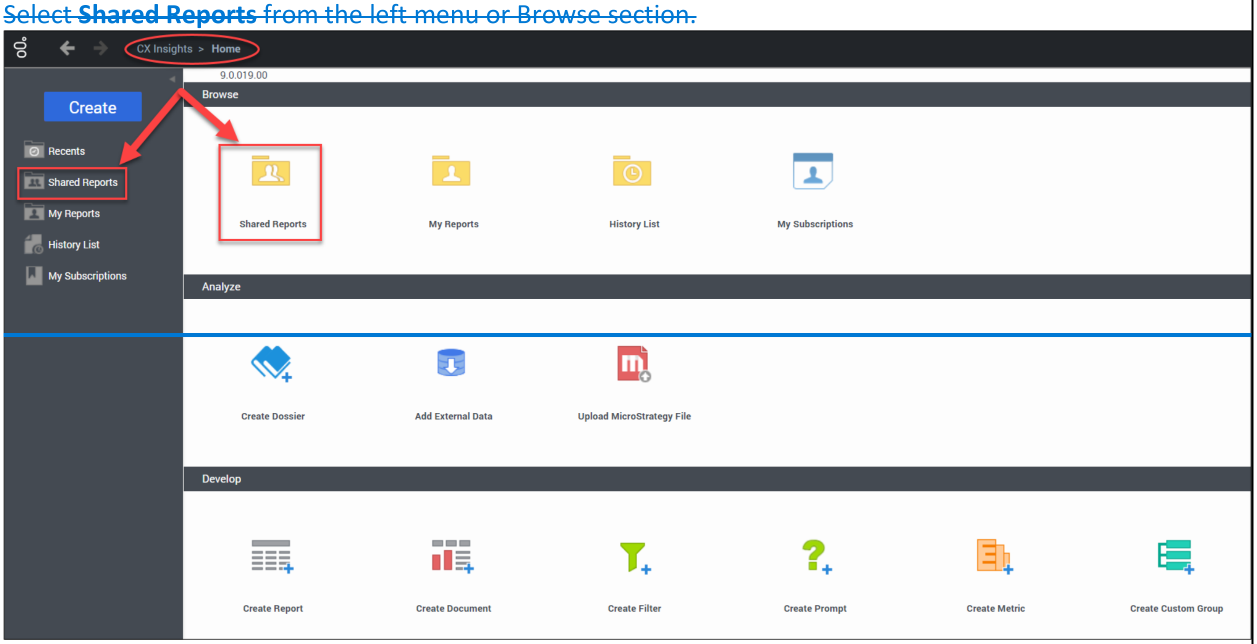
3. ~~Select **CX Insights**.~~



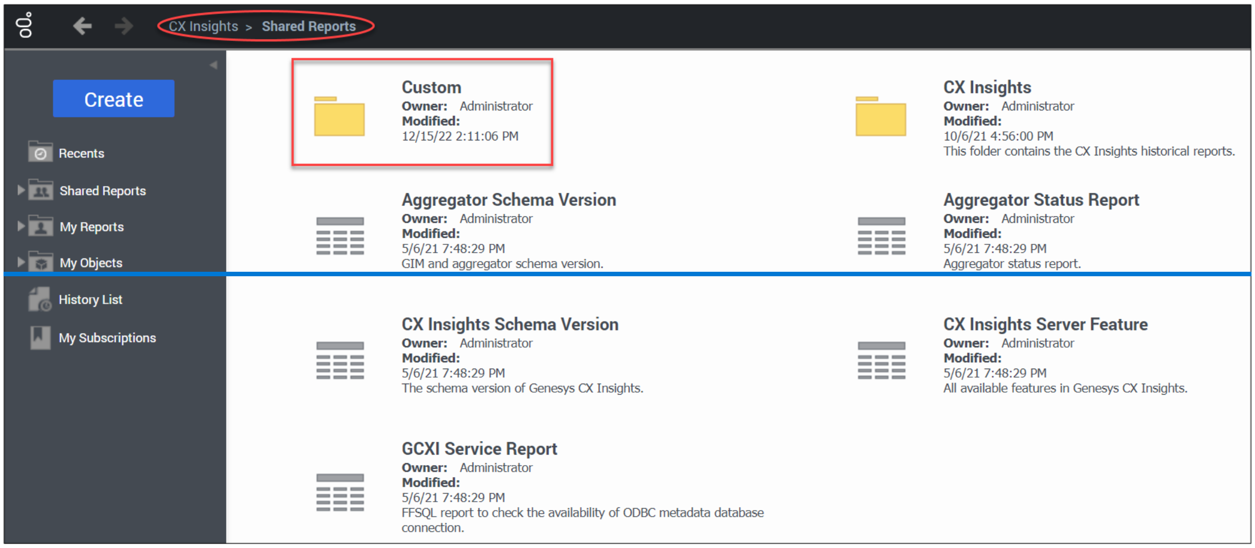
4. ~~Warning message displays, select **continue**.~~



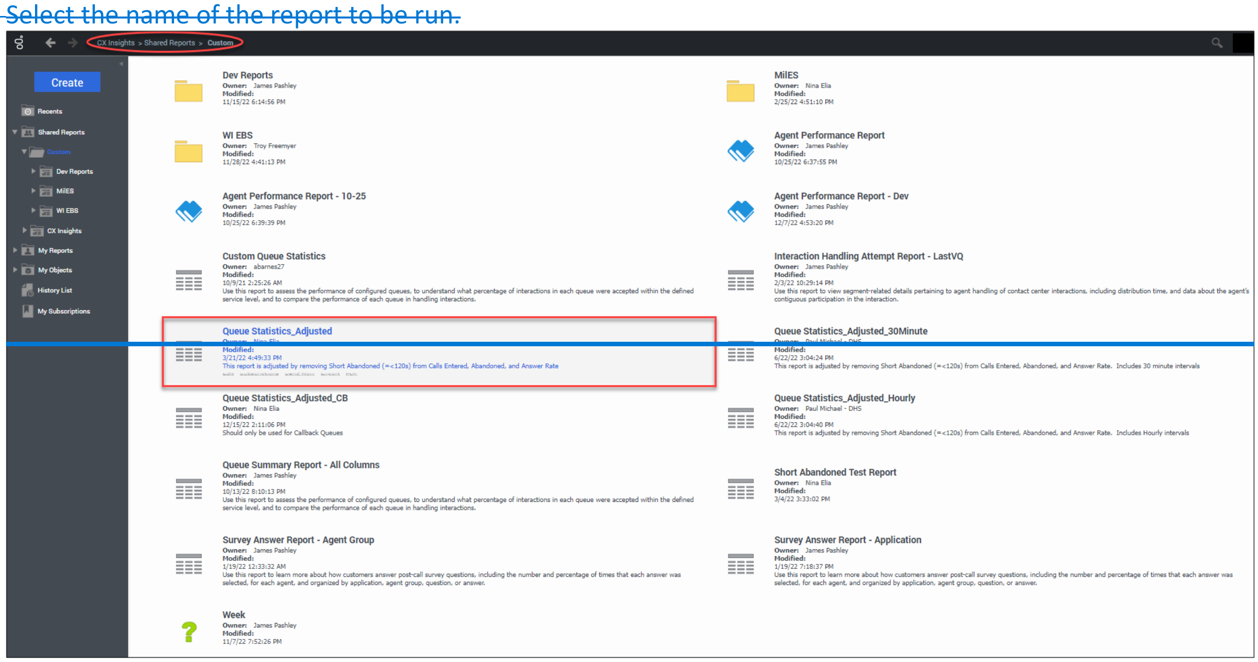
5. ~~From CX Insights > Home page, navigate to the folder that contains the desired report. Select **Shared Reports** from the left menu or Browse section.~~



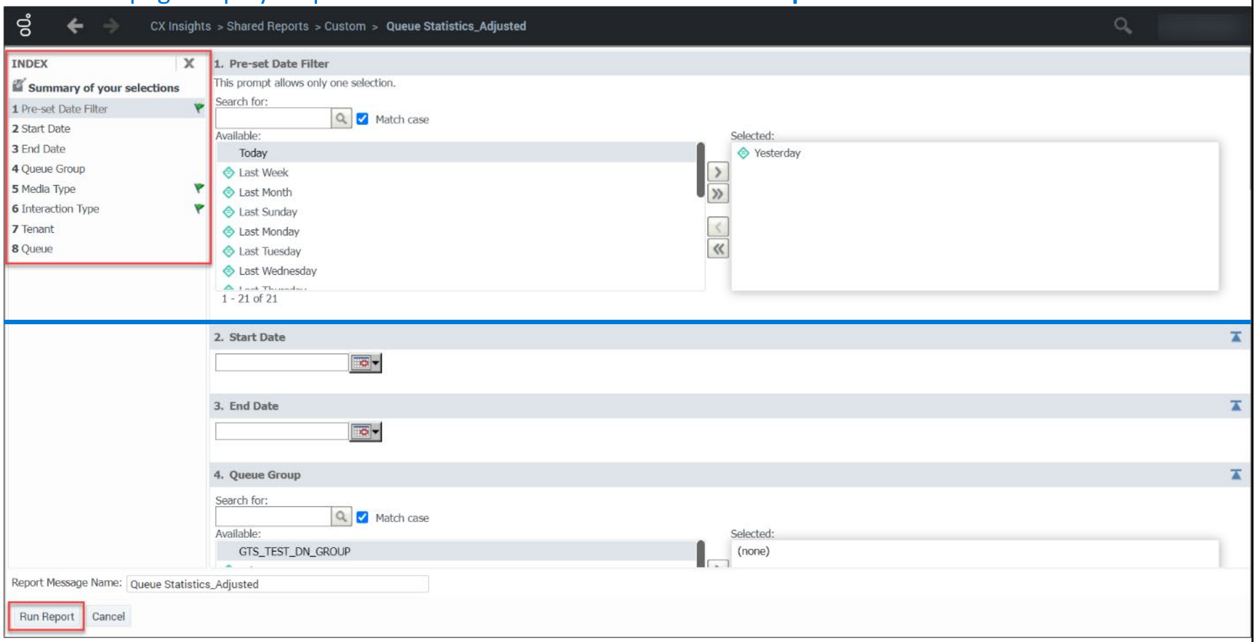
~~6. Select the **Custom** folder.~~



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

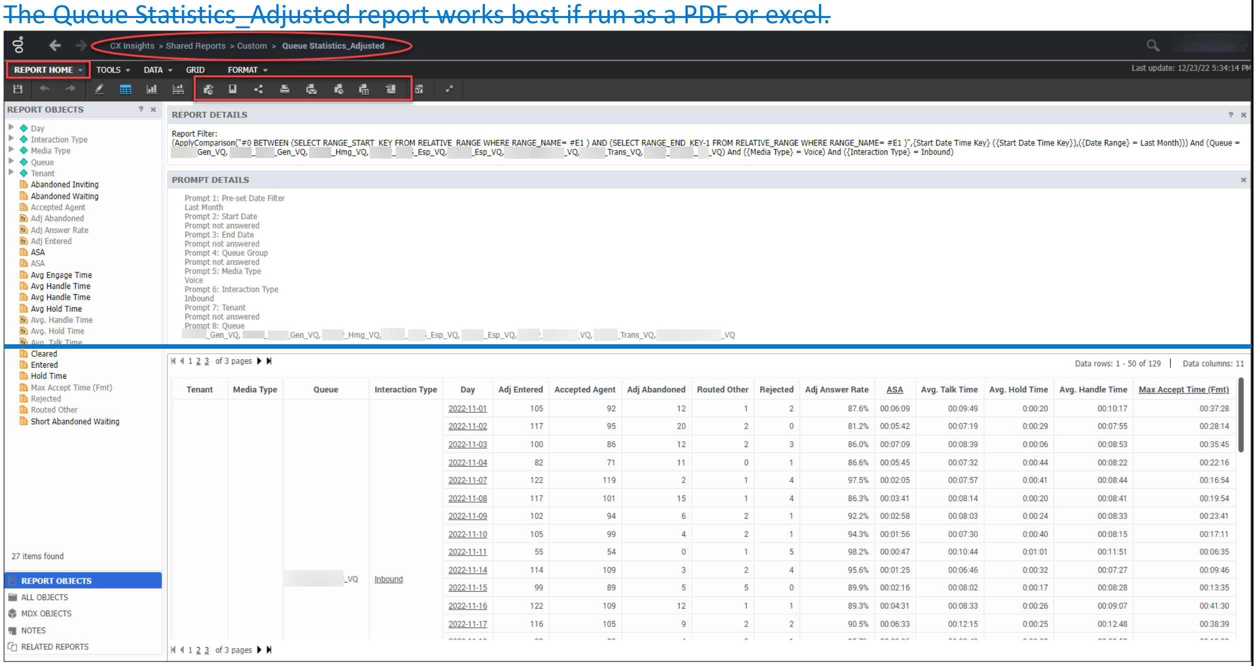


~~8. The INDEX page displays. Update the INDEX filters then select **Run Report**.~~



~~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)~~

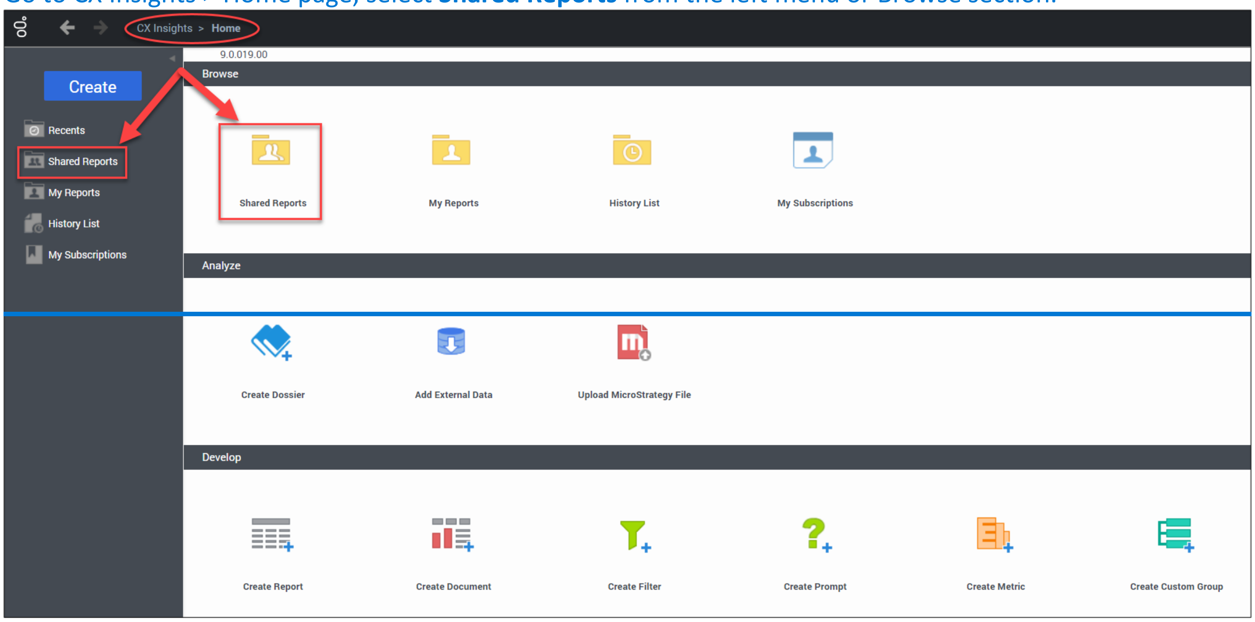
~~Reports can be delivered automatically to a History List Subscription or E-mail Subscription. Delivery of the reports can be scheduled to take place at regularly scheduled times or when a specific event occurs. To do this, a subscription to the desired report needs to be created.~~

~~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.~~

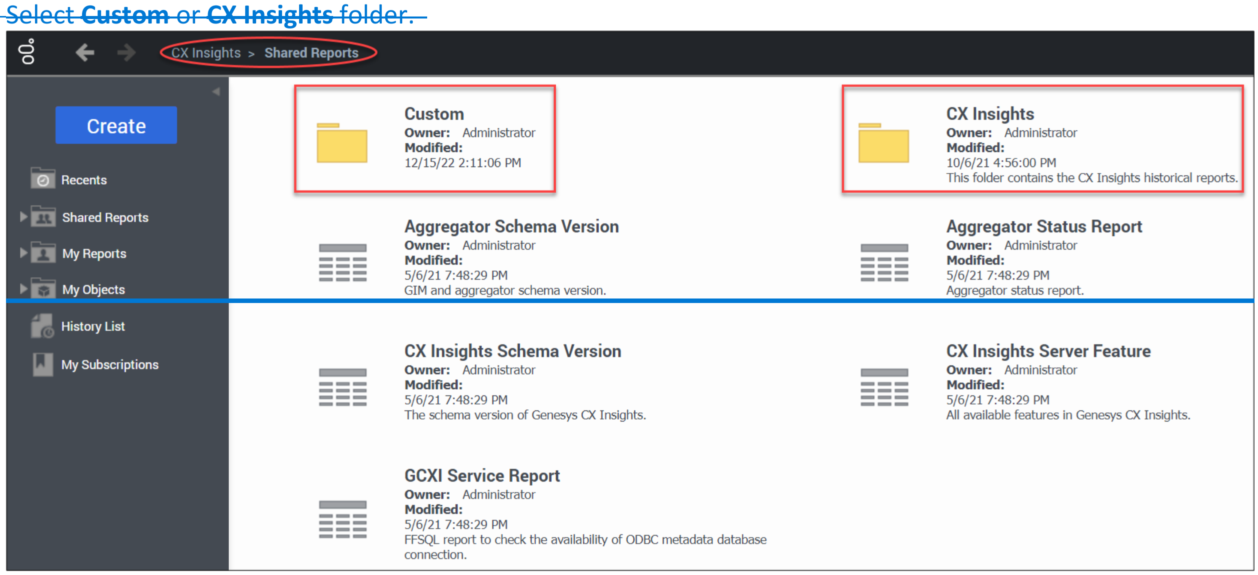
~~*9.2.2.1 Email Subscription*~~

~~To create an Email Subscription:~~

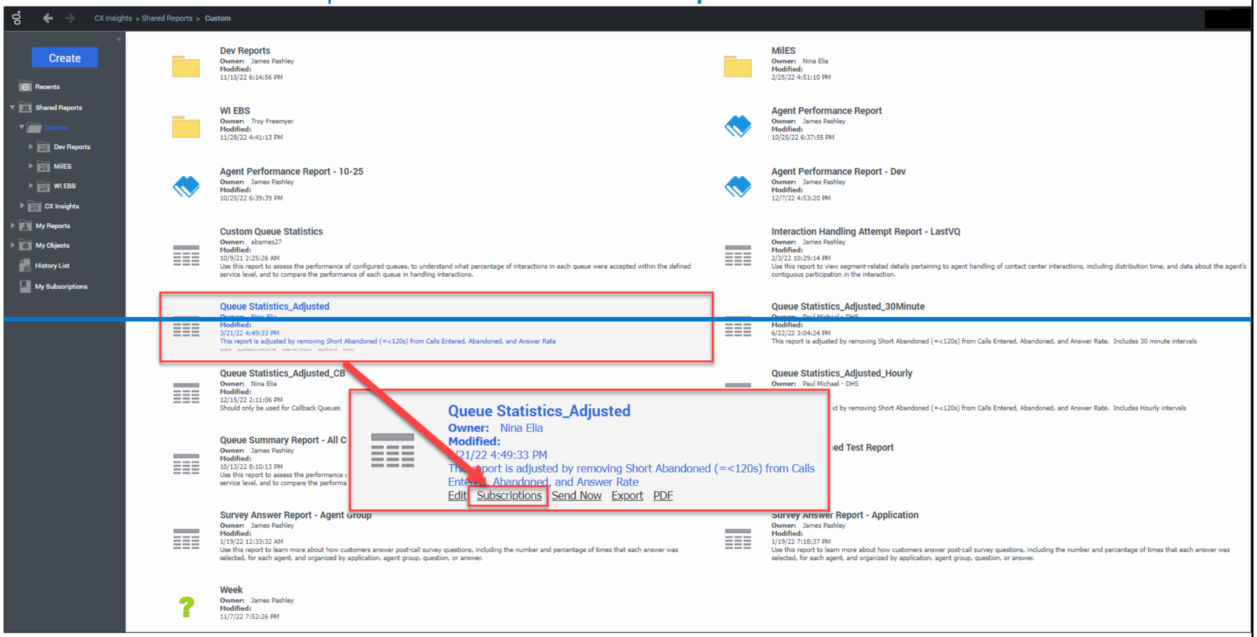
1. ~~Go to CX Insights > Home page, select **Shared Reports** from the left menu or Browse section.~~



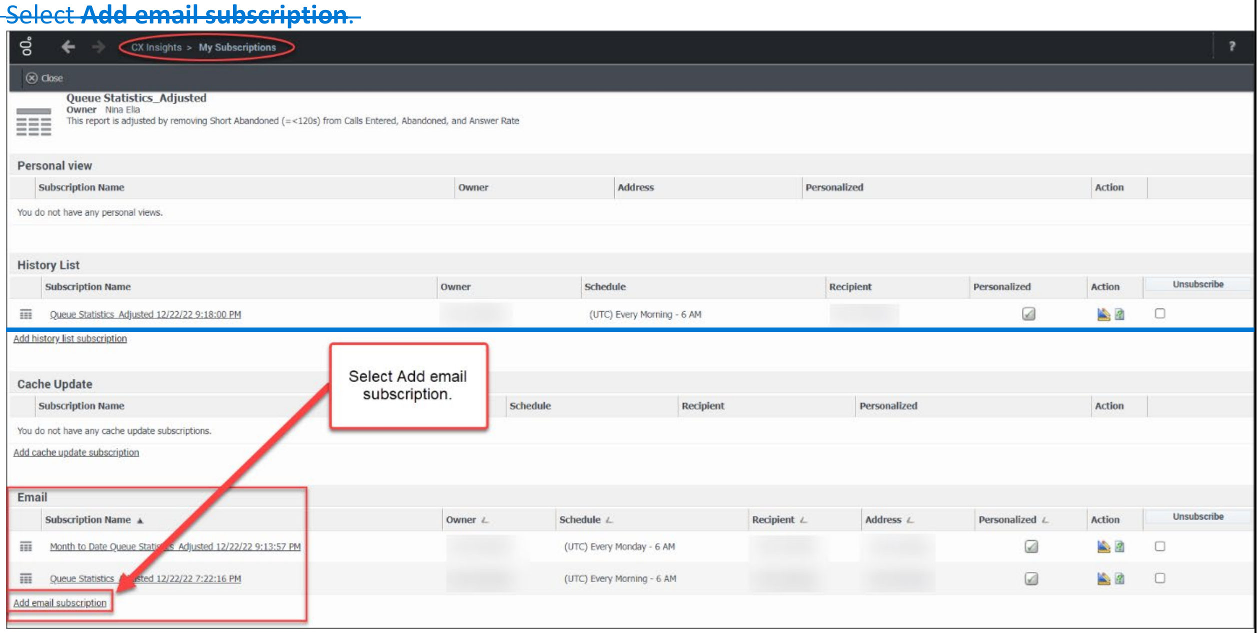
2. ~~Select **Custom** or **CX Insights** folder.~~



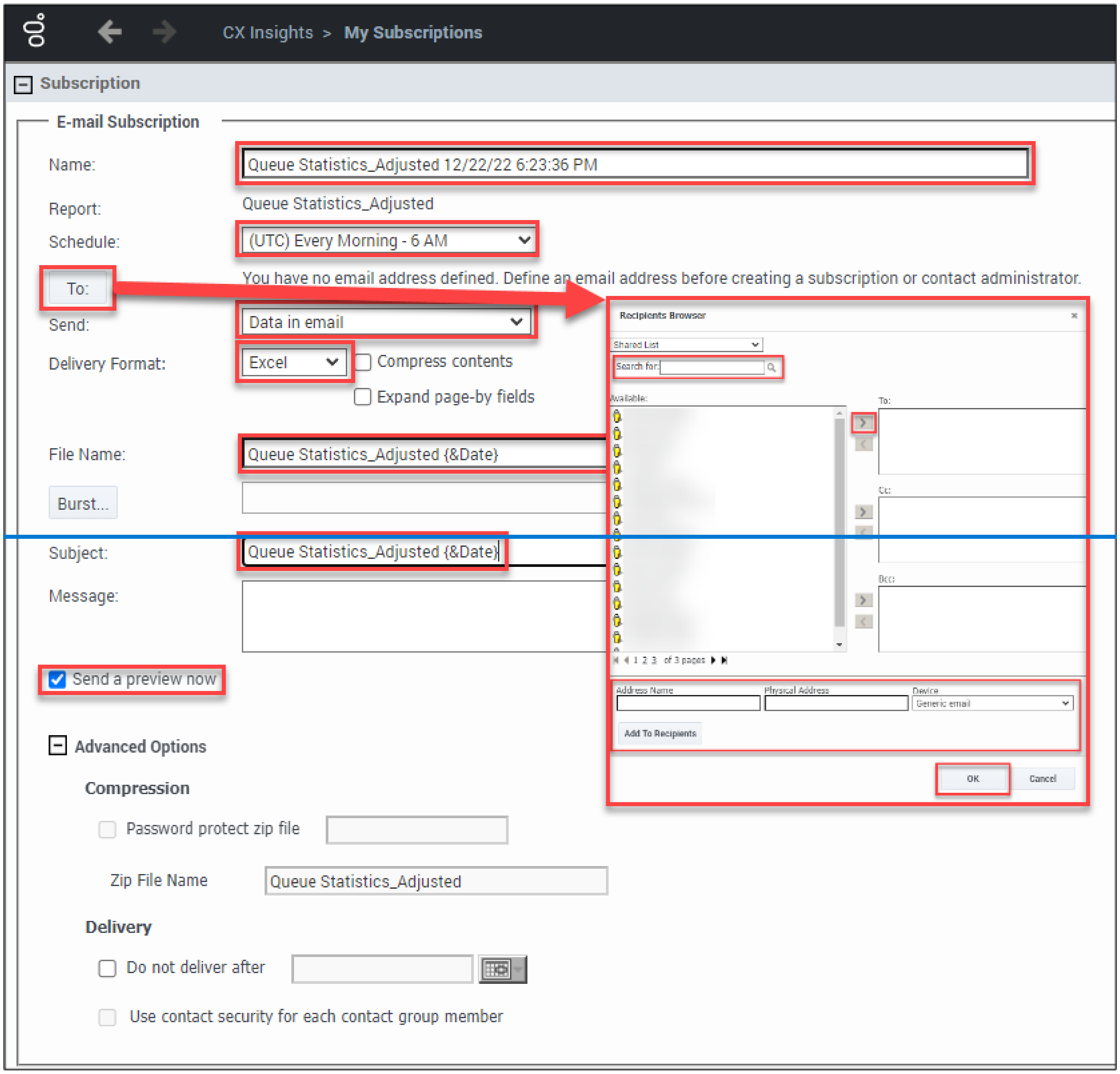
~~3. Hover the cursor over the report of choice and select **Subscriptions**.~~



~~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:~~

1. ~~**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.~~
2. ~~**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.~~
3. ~~**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.~~

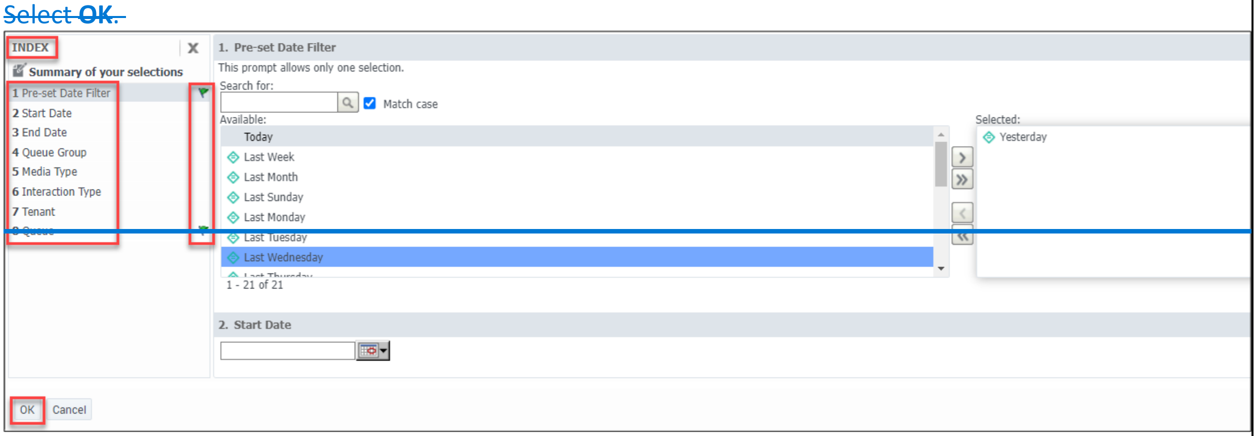
4. ~~**Send:** Default option, Data in email, is the preferred method.~~
5. ~~**Delivery Format:** Preferred delivery format is Excel.~~
6. ~~**File Name:** This field is editable and can be changed. Additional tags can be added to the file name, such as a date. To add the date, enter {&Date} after the file name. To view other available shortcuts hover over the blue details icon.~~
7. ~~**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.~~
8. ~~**Message:** Enter desired message or leave blank.~~
9. ~~**Send a preview now:** To view the email immediately instead of waiting for the specified run time select this checkbox.~~
10. ~~**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.~~

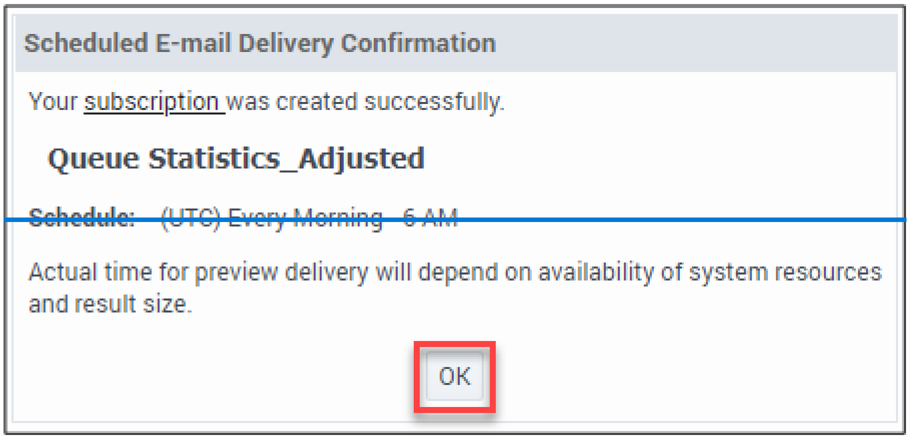
   ~~Displayed green flag means there are filters chosen for that prompt.~~

   ~~Search feature is case sensitive. Uncheck **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

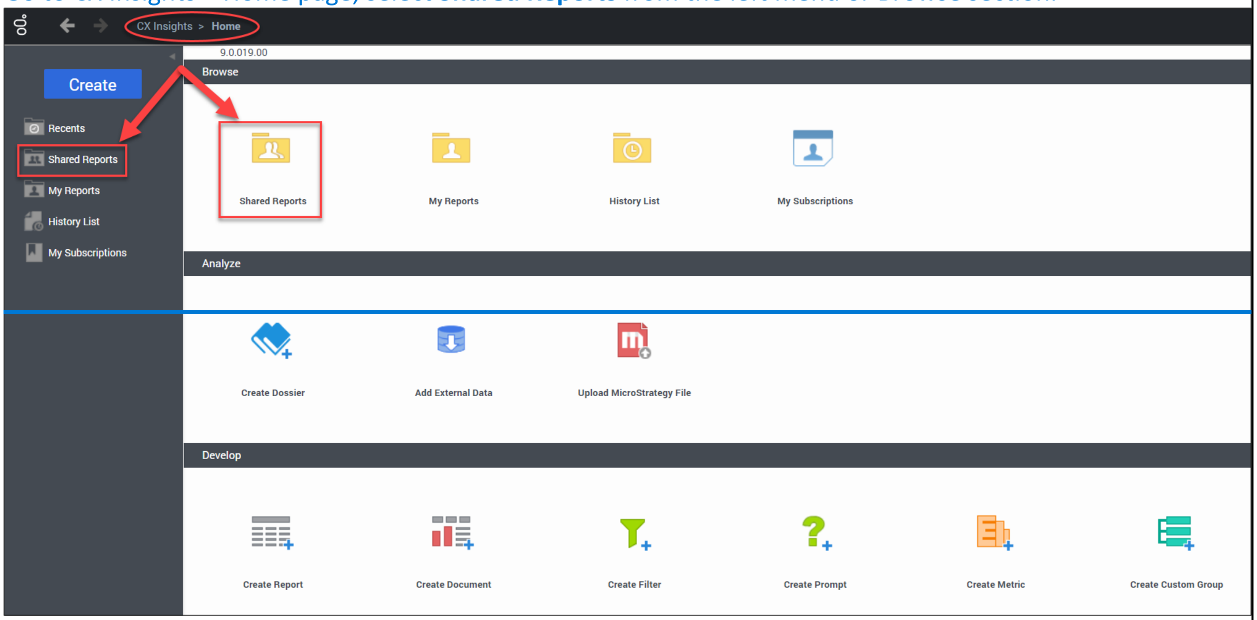
Tenant	Media Type	Queue	Interaction Type	Day	Adj Entered	Accepted Agent	Adj Abandoned	Routed Other	Rejected	Adj Answer Rate	ASA	Avg. Talk Time	Avg. Hold Time	Avg. Handle Time	Max Accept Time (Fmt)
			Inbound	2022-12-21	109	97	11	1	6	89.0%	0:04:40	0:10:18	0:00:13	0:10:38	0:46:35
			Inbound	2022-12-21	37	34	2	1	0	91.9%	0:03:54	0:11:04	0:00:02	0:11:12	0:11:00
Environment	Voice		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*~~

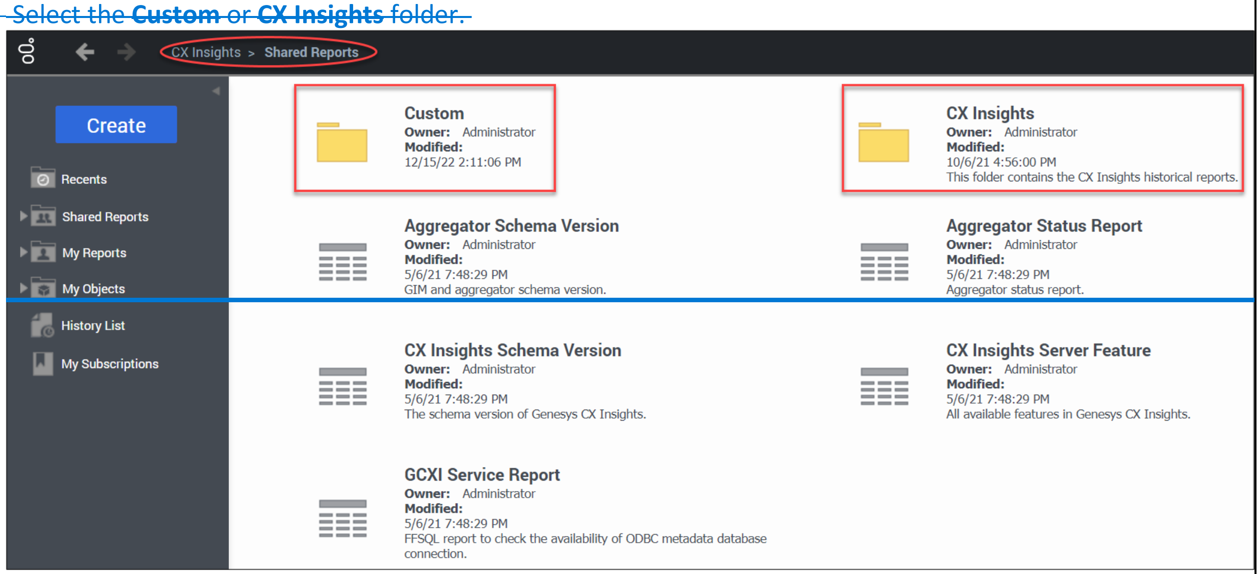
~~History list subscription saves a copy of the filtered report to the user's Reporting History List. The user can run the filtered report directly from the history list. A History List Subscription can be configured to send users an email every time the report is run. The email contains a link to the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

~~To Create a History List Subscription:~~

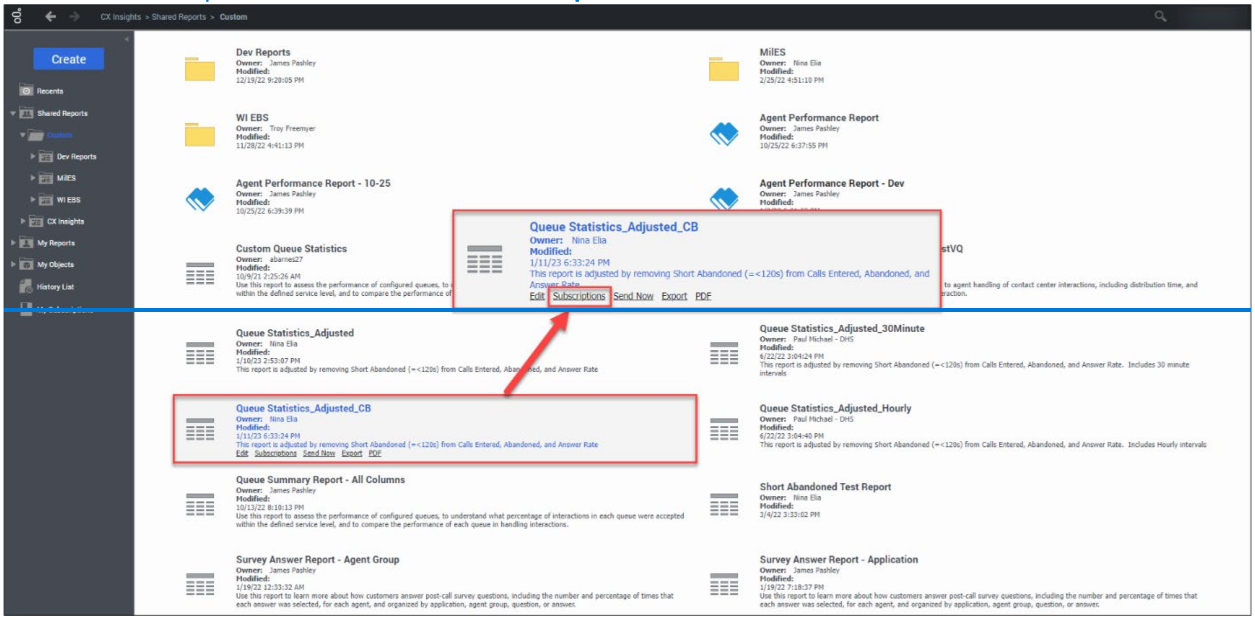
1. ~~Go to CX Insights > Home page, select **Shared Reports** from the left menu or Browse section.~~



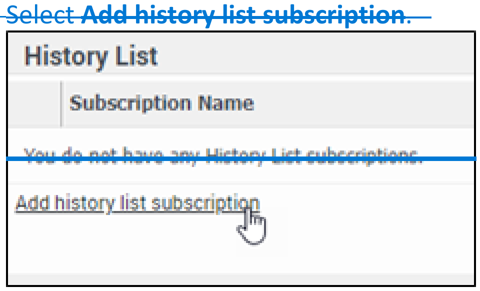
2. ~~Select the **Custom** or **CX Insights** folder.~~



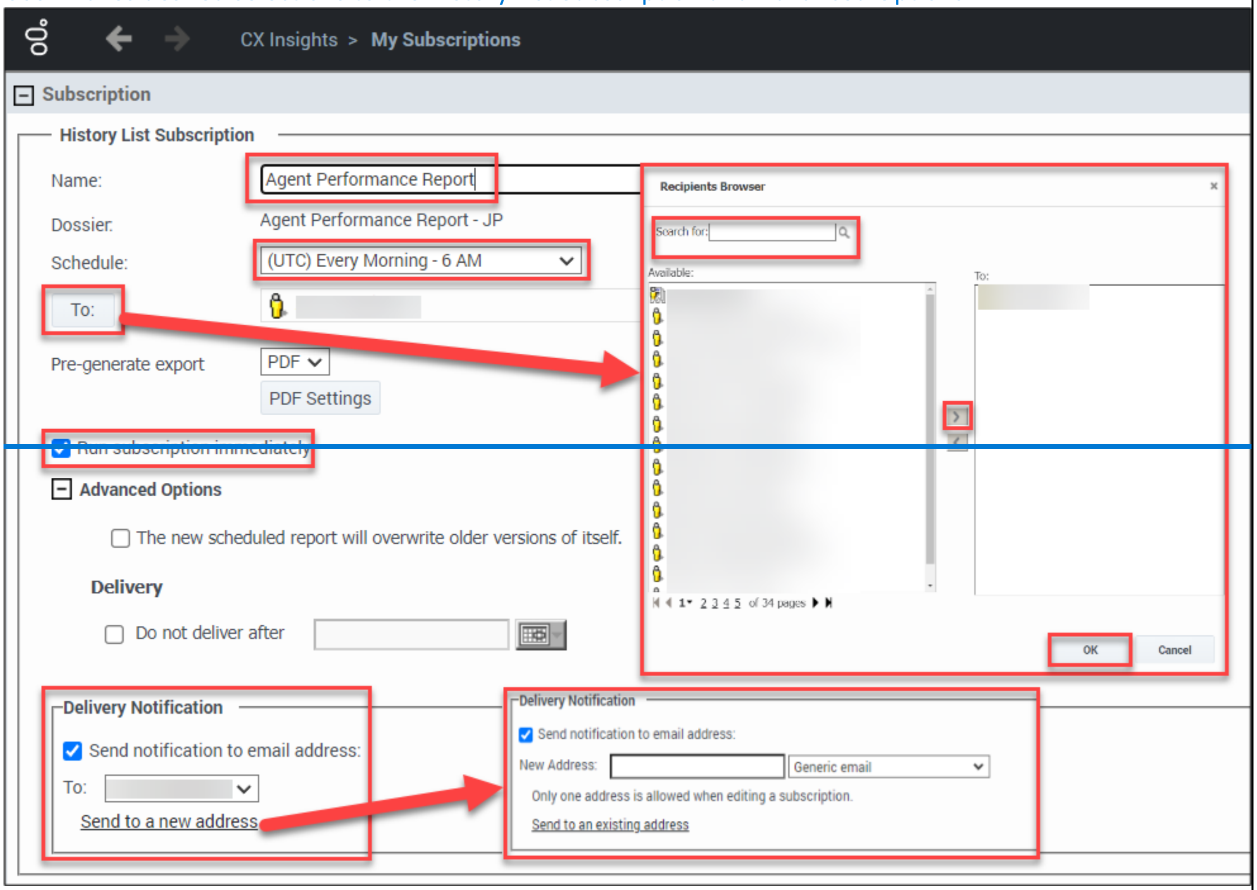
3. ~~Hover over the report of choice and select **Subscriptions**.~~



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



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

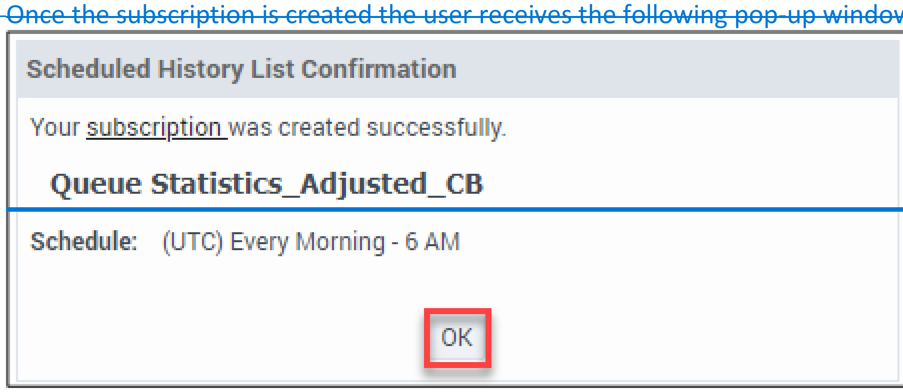


~~When making selections on this page pay attention to the following fields:~~

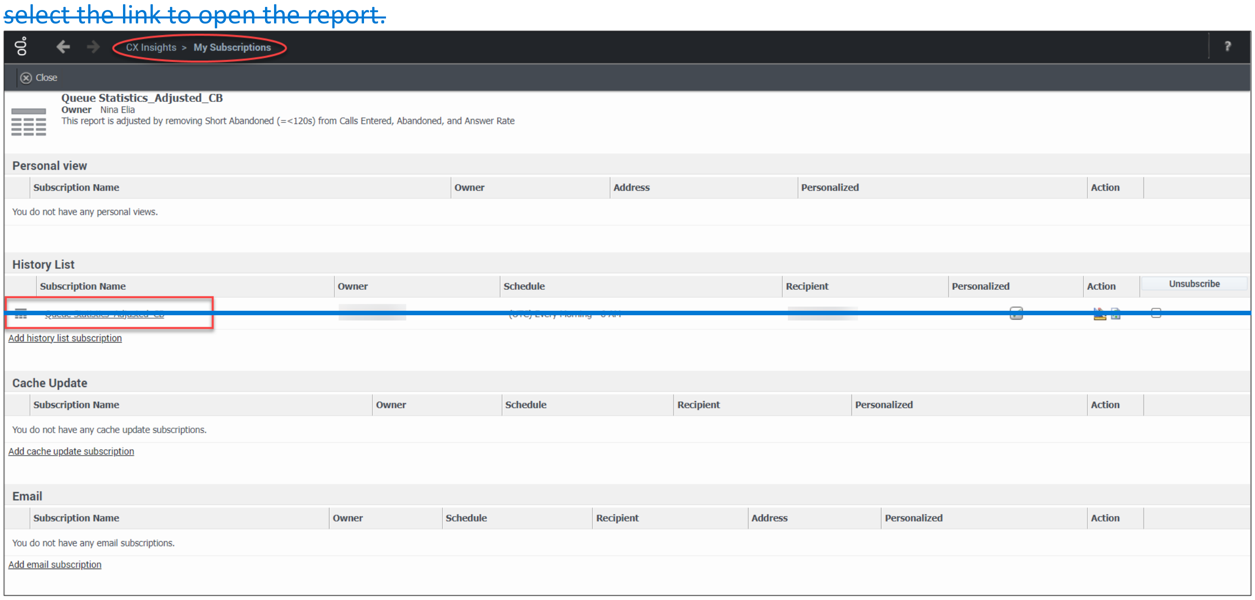
1. ~~**Name:** enter a name for the subscription. This is the name of the subscription for the user's reference and appears in "My Subscriptions" list. By default, the name of the generated report is displayed.~~
2. ~~**Schedule:** from the drop down select a frequency of the report. Notice the time 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.~~
3. ~~**To:** select this button to add recipients to the subscription.~~
4. ~~**Run subscription immediately:** select this and the system delivers a test report immediately.~~
5. ~~**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**.~~

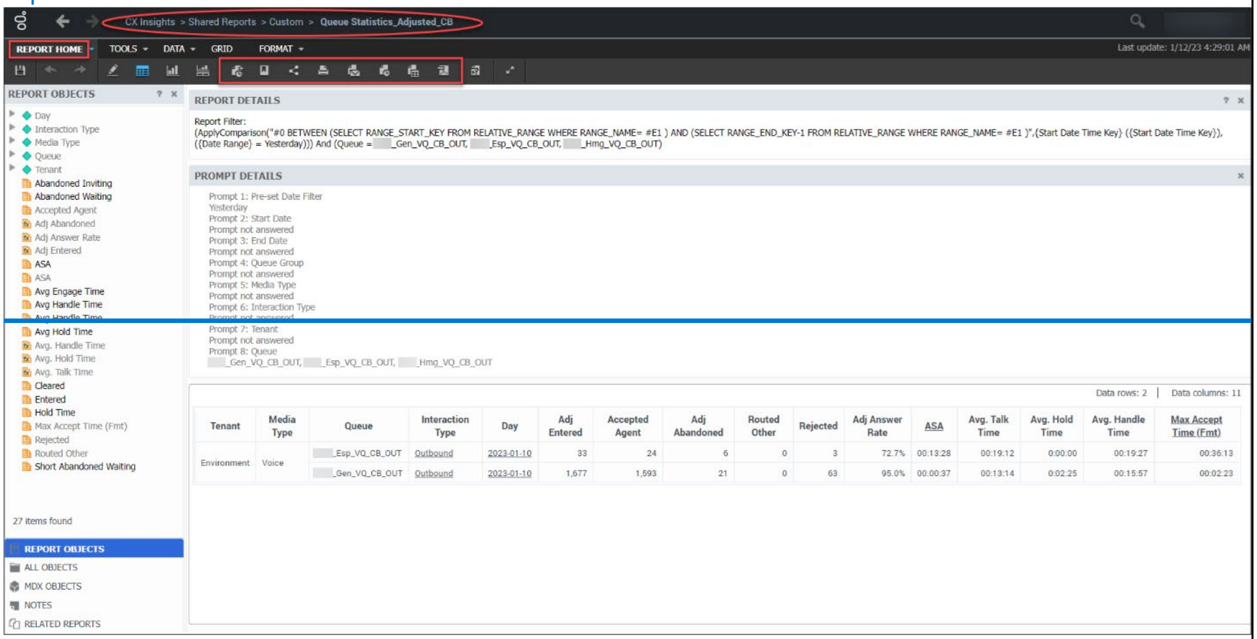


8. ~~The CX Insights > My Subscriptions page is displayed. The subscription appears and the user can select the link to open the report.~~



~~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.~~

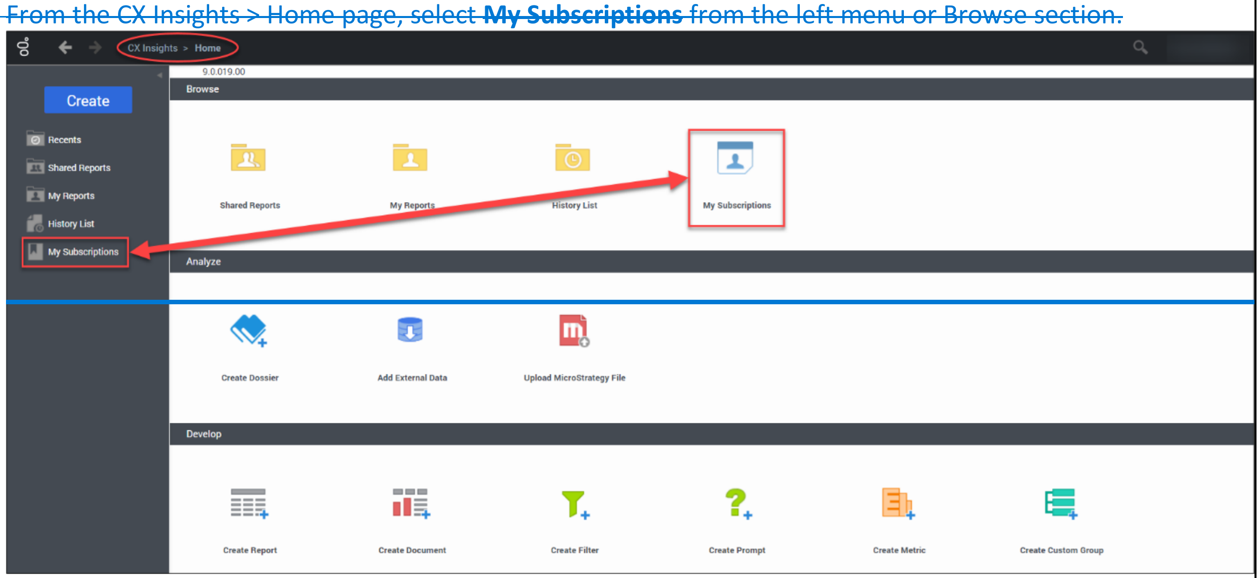


~~The Queue Statistics_Adjusted_CB report works best if exported as an excel document.~~

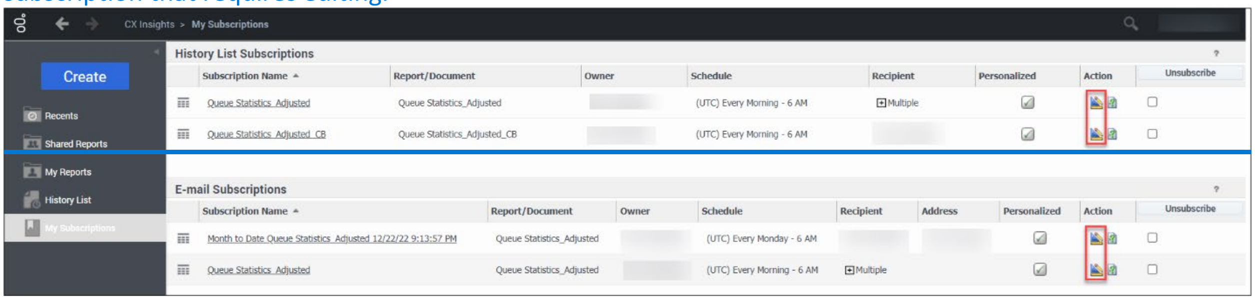
~~9.2.3 Editing Subscriptions~~

~~(Video instructions available: Editing Subscriptions)~~

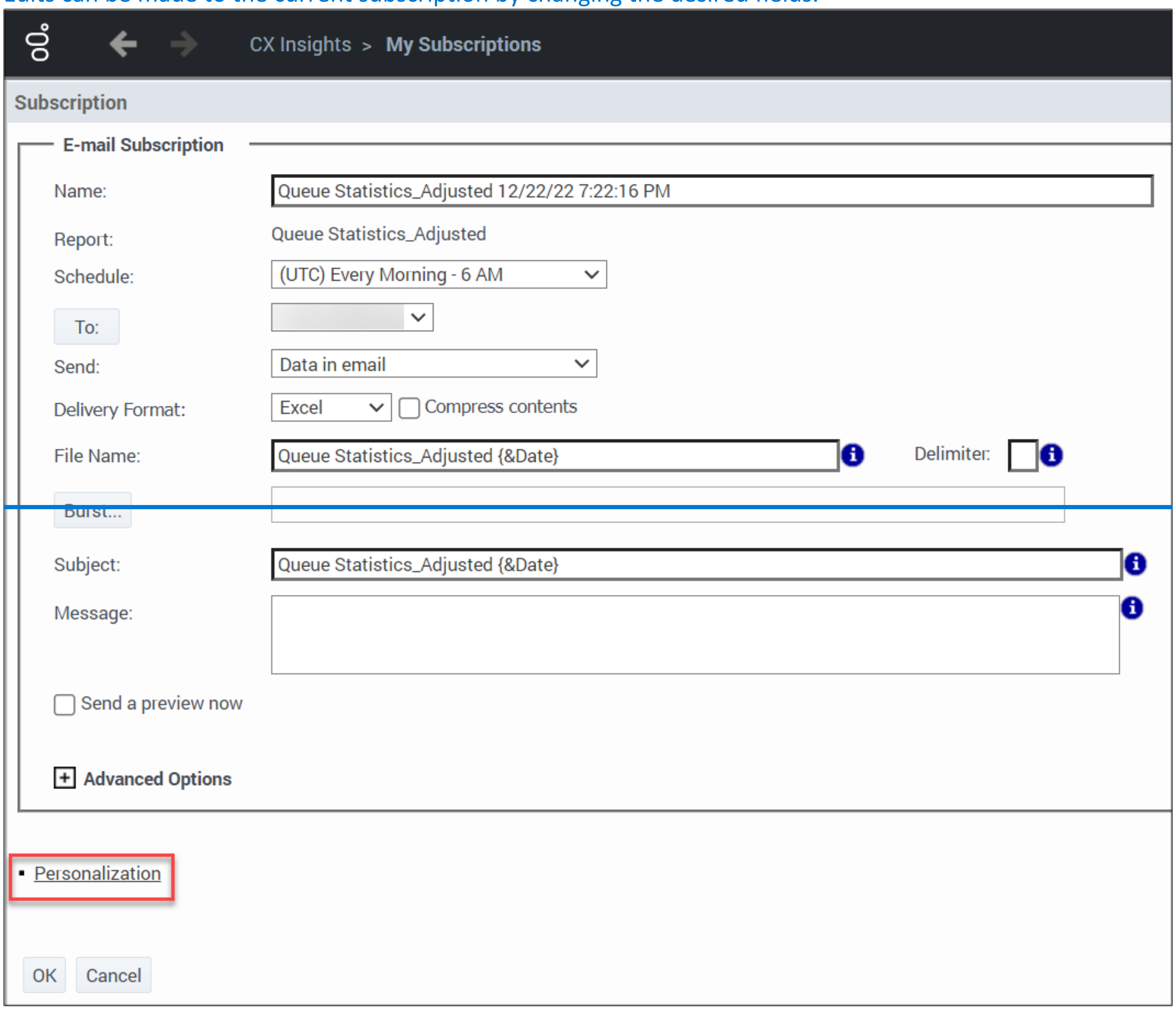
~~1. From the CX Insights > Home page, select **My Subscriptions** from the left menu or Browse section.~~



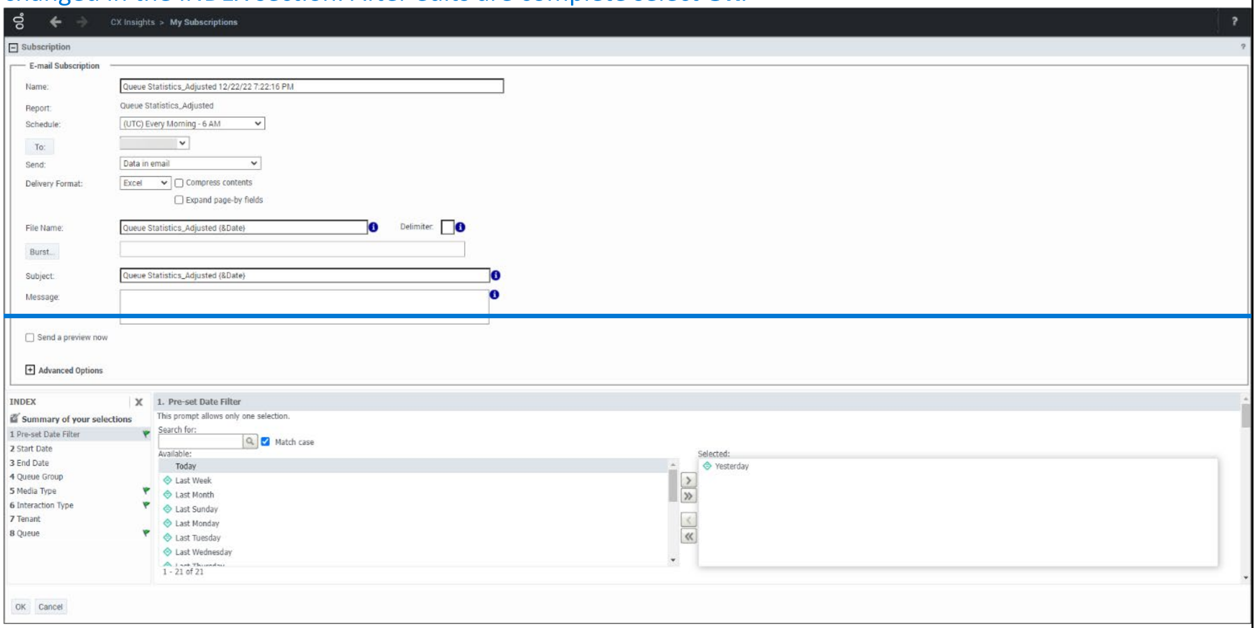
~~2. My Subscriptions displays a list of reports the user is subscribed to. Select the **edit** button for the subscription that requires editing.~~



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



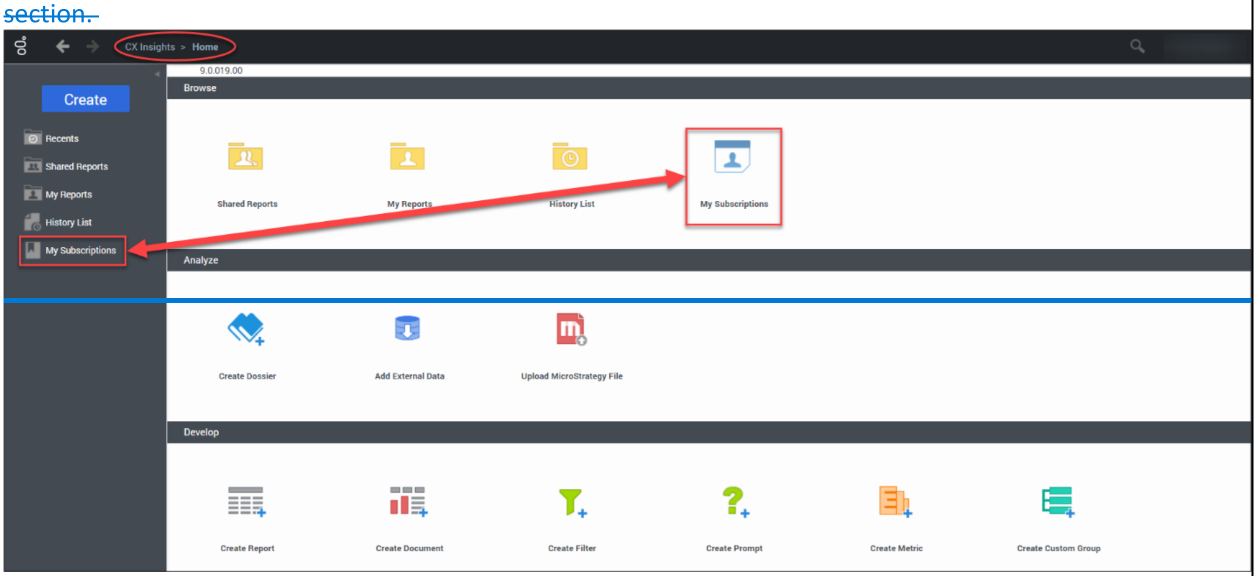
4. ~~To change previously selected filter options, open the Personalization link. Filter selections can be changed in the INDEX section. After edits are complete select **OK**.~~



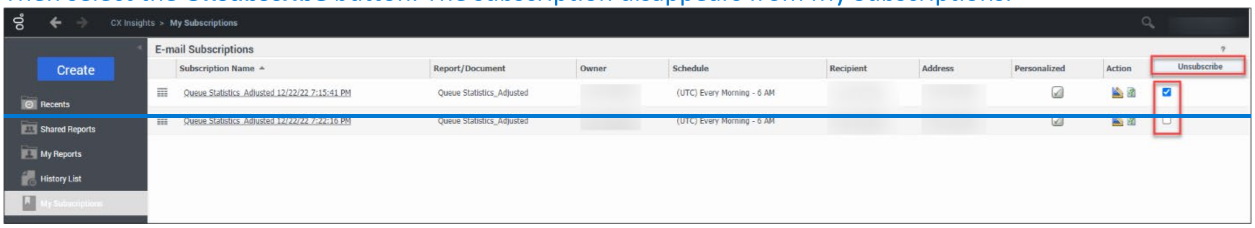
~~9.2.4 Unsubscribing from Subscriptions~~

~~(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 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 – Daily tab provides agent performance statistics day over day.~~
  ~~Show/Hide an example of this report~~

~~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)*~~ ~~Wrap time, as a percentage of handle time~~	~~Percent~~
~~**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~~

~~*9.2.5.3 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 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~~

~~9.2.5.4 Queue Voicemail Counts~~

~~The Queue Voicemail Counts report displays a count of all calls sent to voicemail. It is not a count of the number of voicemail recordings.~~

~~This report can be found in Historical Reporting: Shared Reports > Custom > Queue Voicemail Counts~~

- ~~Selections for this report require choosing a "pre-set date filter" and the "queue" from the Index section of the page.~~
- ~~When choosing a queue make sure it has "vm" in the queue name.~~
- ~~This report can be subscribed to or run daily.~~

Tenant	Media Type	Queue	Interaction Type	Day	Routed to VM
Environment	Voice	_fraud_vm_vq	Inbound	2023-09-06	123

~~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~~
~~Routed to VM~~	~~Total calls that were sent to voicemail~~	~~Count~~

~~10 Local Passwords~~

~~10.1 Setting a Local Password (Video instructions available: Setting a Local Password)~~

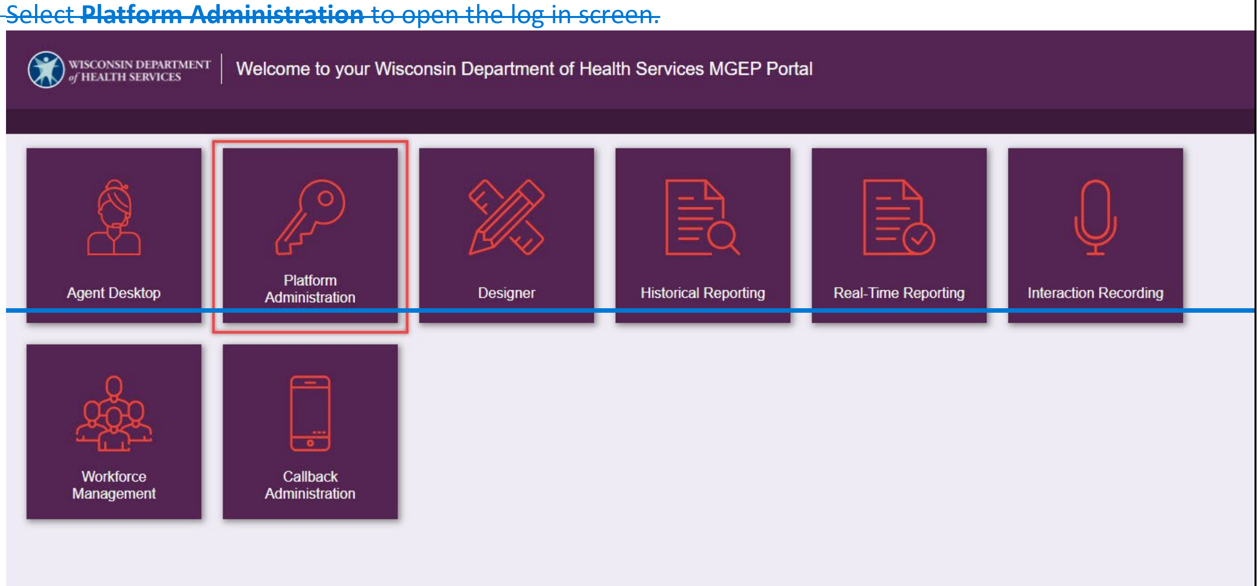
~~When accessing the Platform Administration and Interaction Recording tiles, a single local password is used. This password is set up when accessing Platform Administration for the first time. Once set up, use the password for both.~~

~~10.1 Setting a Local Password~~

~~(Video instructions available: Setting a Local Password)~~

~~To set up a local password:~~

1. ~~Open the Genesys Portal with Firefox, Edge, or Chrome.~~
2. ~~Select **Platform Administration** to open the log in screen.~~



3. ~~Enter your WAMS ID, enter the internal password provided to you in the password field, and select **Log In**. Your WAMS ID is the same as your Internal ID.~~
4. ~~The page tells you to change your password. Enter the desired new password in the new password field and in the confirm password field.~~

~~**Note:**~~	~~Do not enter the username as a password and make sure to follow alphabetic and numeric guidelines when creating the password.~~

5. ~~Select **Log In**. This sets the local password.~~

~~11 Troubleshooting~~

~~11.1 Accessing Genesys Troubleshooting~~

~~11.2 Status Troubleshooting~~

~~11.3 Recording Search Troubleshooting (Video instructions available: Recording Search Troubleshooting)~~

~~11.4 Call Handling Troubleshooting~~

~~11.5 Supervisor and Administrator Troubleshooting~~

~~11.6 Submitting a Genesys Support Ticket (Video instructions available: Submitting a Genesys Support Ticket, Escalating a Genesys Support Ticket)~~

~~This section is for troubleshooting problems with Genesys. It is updated as new issues are reported.~~

~~If you run into an issue:~~

1. ~~Make sure you've completed all trainings.~~
    1. ~~IM worker trainings are on the Learning Center~~
        - i. ~~Genesys Automated Telephonic Signature~~
        - ii. ~~Genesys for Administrators Training~~
        - iii. ~~Genesys for Agents Training~~
        - iv. ~~Genesys for Supervisors and Administrators training~~
        - v. ~~Genesys for Supervisors Training~~
    2. ~~All others should use the links on the CWW Gateway Page.~~
2. ~~Check if the issue and resolution is provided in this section or in this user guide.~~
3. ~~If the issue is not in either, reach out to support and describe the issue with as much detail as possible. Please include:~~
    1. ~~Name~~
    2. ~~Name of the place the agent is using~~
    3. ~~Detailed description of the issue~~
        - i. ~~Include the name of the application you are trying to use~~
        - ii. ~~Include any error messages you are receiving~~
    4. ~~Screenshots~~
    5. ~~Conn ID for calls that have trouble~~

~~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.~~ • ~~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 in the browser.~~
~~**White Label Error**~~	~~White Label Error displaying when attempting to access the agent page:~~	• ~~Clear browser history.~~ • ~~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 in the browser.~~
	~~Agent Desktop log-in:~~	• ~~All Genesys user IDs are case sensitive. Please ensure use of the correct case.~~

~~**Can't log in, invalid credentials**~~		• ~~Be sure to use the correct Tenant: sowi.mgep.info~~
	~~Platform Administration:~~	• ~~All Genesys user IDs are case sensitive. Please ensure use of the correct case.~~ • ~~All users are given a temporary password for Platform Administration when their account was created. If the temporary password is 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 use of the correct case.~~ • ~~Be sure to use the correct Tenant: sowi.mgep.info~~
	~~Invalid or forgotten credentials~~	• ~~See Section 2.3 Forgotten Credntials for instructions to recover a WAMS user ID or password.~~

~~11.2 Status Troubleshooting~~

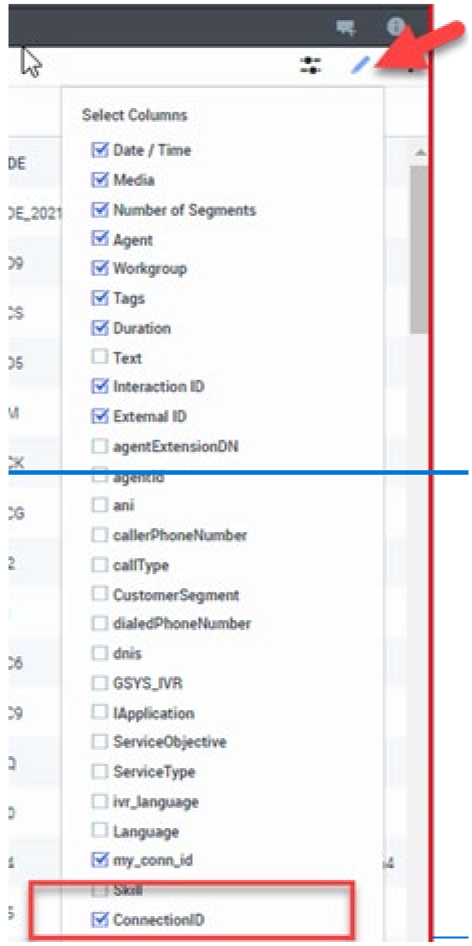
~~**Issue**~~	~~**Description**~~	~~**Resolution**~~
~~**Not receiving calls in "Ready" status**~~	~~Not receiving calls while in "Ready" state~~	• ~~Submit a ticket to the Wisconsin Help Desk. See Section 11.6 Submitting a Genesys Support Ticket.~~
~~**Stuck in "Busy" status**~~	~~Stuck in "Busy" status and not able to change to "Ready"~~	• ~~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, submit a ticket to the Wisconsin Help Desk. See Section 11.6 Submitting a Genesys Support Ticket.~~
	~~Selected Status of "Ready" unexpectedly~~	~~Genesys offered a call to the agent and the agent did not answer. This may be caused by:~~

	~~changes to "Not Ready" (No Answer)~~	- ~~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,submit a ticket to the Wisconsin Help Desk. See Section 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 Instructions*~~ ~~**Update Edge Settings**~~ ~~*Show/Hide Instructions*~~
	~~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 connectivity.~~

~~11.3 Recording Search Troubleshooting~~

~~(Video instructions available: Recording Search Troubleshooting)~~

~~**Issue**~~	~~**Description**~~	~~**Resolution**~~

~~**No Connection ID in search results**~~	~~Connection ID column doesn't appear.~~	• ~~Add the Connection ID by clicking "Select Columns" icon~~ 
~~**Unknown Connection ID**~~	~~Don't have Connection ID to search~~	• ~~Search by Agent and date~~
~~**Missing Recording**~~	~~Can't find recording in "Interaction Recording" search or the ECF.~~	• ~~There is a delay while recordings are indexed of approximately 20 minutes.~~ • ~~If the telephonic signature is missing in the ECF, see Section 7.2.3 Telephonic Signature Recording Missing in the ECF.~~

~~11.4 Call Handling Troubleshooting~~

~~**Issue**~~	~~**Description**~~	~~**Resolution**~~
~~**Telephonic Signature/Automated**~~	~~Entering the prompt ID and other commands in ATS. System may~~	• ~~Generally, using your phone to enter these commands is recommended. However, you can~~

~~Telephonic Signature (ATS)~~	~~respond with "Invalid Entry."~~	~~try to use the keypad provided with the Genesys Agent Desktop application.~~ • ~~If commands are not working from any phone, conference "ATS Other" and read the information to the customer.~~ • ~~Reminder: Agents must use one of the ATS conferences for the telephonic recording to be saved and sent to ECF.~~
	~~Where is the record button?~~	• ~~100% of Genesys calls are recorded. Therefore, no record button is necessary.~~ • ~~Agents **must** use one of the ATS conferences for the telephonic recording to be saved and sent to ECF.~~
	~~How do I complete a telephonic signature?~~	• ~~A new process for telephonic signature is in place.~~ • ~~Training for IM workers to complete a telephonic signature is available via the learning center.~~ • ~~Process Help 1.6.8~~
~~Problems with outbound calling~~	~~Making a call to an external phone number~~	• ~~When placing an outbound call, only enter the 10-digit number.~~ • ~~Entering a "1" before the dialed phone number **will not** complete the call.~~
~~Problems with inbound calling~~	~~Genesys offers a second call while the agent is on an existing Genesys call~~	~~While getting a second call is not typical, there are circumstances under which an agent may receive a second call while they are currently on a call.~~ • ~~If an agent transfers a call directly to another agent, that call will be offered to the second agent, regardless of their status in Genesys.~~ • ~~If an agent makes themselves ready while they are on a call, they may receive a second call from the queue.~~ ~~When a second call is offered to an agent while they are on another call, the outcome will vary based on how the agent's phone is set up to receive a second call.~~ • ~~If the agent's voicemail picks up, it will appear as a second live interaction in agent desktop until the customer disconnects. Both calls should be available in "Genesys Interaction Recording" to confirm this outcome.~~ • ~~If the agent's phone does not have voicemail and simply rings, the agent status will automatically change to "Not Ready-No Answer."~~

		• ~~If the agent's phone delivers a busy signal, the agent's status will automatically change to "Not Ready" (No Reason Code).~~

~~11.5 Supervisor and Administrator Troubleshooting~~

~~Issue~~	~~Description~~	~~Resolution~~
~~Monitor tab in Agent Desktop not visible~~	~~Monitor tab is not visible~~	• ~~Submit a ticket to the Wisconsin Help Desk. See Section 11.6 Submitting a Genesys Support Ticket.~~
	~~Queues or staff not displaying under monitor tab~~	• ~~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 or Designer~~	~~Unable to access these applications~~	• ~~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 the user must set up a local password in Platform Administration. See Section 10.1 Setting a Local Password~~ • ~~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 Help Desk for additional troubleshooting support. The Genesys Cloud 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~~

~~The subject line needs to clearly describe the overall issue and mention Genesys.~~

~~Do~~	~~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 Event"~~	• ~~"Genesys"~~ • ~~"Problems"~~ • ~~"Genesys Issue"~~ • ~~"Genesys isn't working"~~ • ~~"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)~~
- ~~Screenshots~~
- ~~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@dhs.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@dhs.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.~~