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

То:	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

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

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2 Accessing Genesys

2.1 Logging In to Genesys (Video instructions available: Logging Into 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

- 2.2 Logging Out of Genesys (Video instructions available: Logging Out of Genesys)
- 2.3 Forgotten Credentials (Video instructions available: Forgotten Credentials)
- 2.4 Select or Change Phone
- 2.5 Change Password (Video instructions available: Changing a Password)

2.6 Edit Your Profile (Video instructions available: Editing Your Profile)

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 <u>new password.</u>

	Genesys Cloud
	Welcome to Genesys Cloud
	A New password
	Verify new password
	Register
	This is a secured web application. By accessing this system you agree to Genesys's Terms & Conditions and that you are a member of this organization and will abide by any security rules they require. Genesys Cloud keeps you safe. View our Privacy Policy.
	Back to Login
<u>After</u>	 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 uppercedulation of the special character.

- 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.

<u>.</u>	Genesys Cloud
	Welcome to Genesys Cloud
	■
	Register
	This is a secured web application. By accessing this system you agree to Genesys's Terms & Conditions and that you are a member of this organization and will abide by any security rules they require.
	Genesys Cloud keeps you safe. View our Privacy Policy.
	Back to Login
4. If you are promp	nted 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.

<u>Note</u>

My Account and Architect are not used.



2.1.2 First Time Logging In to Genesys After Account Activation

- 1. Navigate to the <u>Genesys Login Page</u> 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.



	Email Address		
	Password		
	Organization (optional)		
Require	id if email address is used with multiple orp	panizations	
	Log in		
Forgot	Your Password? Forgot	t Organization Name?	
	More Login Options		
			gin using Genesys Cloud.
f this scree	en appears, select Collab		
<u>f this scree</u>	en appears, select Collab	Genesys Clo	oud.
<u>f this scree</u>	en appears, select Collab	Genesys Clo	oud.
<u>f this scree</u>	A My Account	Collaborate/ Communicate	Architect
<u>f this scree</u>	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

<u>2.1.3</u> 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.

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	Email Address Password Americas (US West) [change] Log In Forgot Your Password?	DHS.Genesy I Chance Orcianization 1
ළ	Genesys Cloud	×
	Email Address	
	Password	
Required If em	Organization (optional) all address is used with multiple organizations Americas (US West) [change]	
Forgot Your Pi	Log In ssword? Forgot Organization Name?	
	More Login Options	

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.

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1.3. In the pop-up window, click on Password.

Preferences	Change Password Current password	
Password		
Voicemail PIN	New password	
Language	At least 8 characters long	
Sound	Verify new password	
Video		
	Change 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.

ő	Activity Director	r y – Documents	Performance 👻	Admin
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	out of office /	Criterenetes		() rogour



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)

3.2 Performance (Video instructions available: Performance)

3.2.1 My Performance

3.2.2 My Status

3.2.3 My Interactions

3.2.4 My Queues Activity

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

3.2.1 My Performance 3.2.2 My Status 3.2.3 My Interactions 3.2.4 My Queues Activity

(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

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From the Performance drop down menu.

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0	View Public Profile		Workspace
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From the <u>></u>Workspace, <u>>New Tab screen</u>, scroll down to the section titled My Performance and select My Performance.

Select a view to	o load by clicking its name.						
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My Status							
Other		<u>^</u>					

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

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

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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.

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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

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table below that displays daily details in half hour intervals.

Performance Statu	ses Evaluations Int	eractions Schedu	le Development						
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0	Answer	Handle	Avg Handle	Avg Talk	Avg Hold	Avg ACW	Hold	Transfer	
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8-				_					
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4 2- 0 Apr 1, 2024 Apr 3, 2024	Apr 5, 2024 Apr 7, 2024	Apr 9, 2024 Apr 11, 202	24 Apr 13, 2024 Apr 15	, 2024 Apr 17, 2024	Apr 16, 2024 Apr 21.	.2024 Apr 23, 2024 A	Apr 25, 2024 Apr 27	, 2024 Apr 29, 2024	
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Apr 1, 2024 Apr 3, 2024 Apr 1, 2024 Apr 2, 2024 Apr 4, 2024 Apr 4, 2024 Apr 5, 2024	Apr 5. 2024 Apr 7, 2024 Apr 5. 2024 Apr 7, 2024 Answer - - - 1 - - - - - -	Apr 0, 2024 Apr 11, 202 Handle - - 3 12 -	 Apr 13, 2024 Apr 15 Avg Handle - 2m 6s 23s - - 	2024 Apr 17. 2024 Avg Talk - - 15s 10s -	Apr 19, 2024 Apr 21. Avg Hold - - -	2024 Apr 23, 2024 A Avg ACW - - 1m 49s 14s - -	Hold - - - -	.2024 Apr 29, 2024 Transfer - - - - - -	
4 2 Apr 1, 2024 Apr 3, 2024 Apr 1, 2024 Apr 2, 2024 Apr 3, 2024 Apr 4, 2024 Apr 4, 2024 Apr 5, 2024 Apr 6, 2024 Apr 7, 2024	Apr 5, 2024 Apr 7, 2024 Answer - - 1 - - - - - - - - - - - -	Apr 0, 2024 Apr 11, 202 Handle - - 3 12 - -	Avg Handle 235	Avg Talk 15s 10s	Apr 10, 2024 Apr 21, Avg Hold - - - - - -	2024 Apr 23, 2024 A Avg ACW - - 1m 49s 14s - - -	Hold - - - - - - -	. 2024 Apr 29, 2024 Transfer - - - - - - - -	
Apr 1, 2024 Apr 3, 2024 Apr 1, 2024 Apr 3, 2024 Apr 1, 2024 Apr 2, 2024 Apr 3, 2024 Apr 4, 2024 Apr 5, 2024 Apr 6, 2024 Apr 7, 2024	Apr 5, 2024 Apr 7, 2024 Answer - - 1 - - - - - - - - - - - - - - - -	Apr 0, 2024 Apr 11, 202 Handle - - 3 12 - - -	Avg Handle - - 23 - 23 - - - - -	Avg Talk 15s - 10s	Apr 18, 2024 Apr 21, Avg Hold - - - - - -	2024 Apr 23, 2024 A Avg ACW - - 1m 49s 14s - - -	Hold - - - - - - - -	, 2024 Apr 29, 2024 Transfer - - - - - - - - - -	

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.

<u>~</u>		_		• A	pril 20	24 🕨								
PRESETS	•		Ap	ril 20	24		•	•		Ma	ay 202	24		•
Today Yesterday	Sun	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Mon	Tue	Wed	Thu	Fri	Sat
This week Last week		1	2	3	4	5	6				1	2	3	4
Previous 7 days This month	7	8	9	10	11	12	13	5	6	7	8	9	10	11
This month by week Last month	14	15	16	17	18	19	20	12	13	14	15	16	17	18
Previous 30 days Previous 3 months	21	22	23	24	25	26	27	19	20	21	22	23	24	25
Day Week	28	29	30					26	27	28	29	30	31	
Month			~	~						~	~			
Month by Week			12	00	AM					12 :	00	AM		
Time zone			~	~						~	~			
America/Chicago (U 🗸	0	14/0	1/20	1041	12.00	STAF	т Л		1/20	0/1	12.00		1	→

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

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FILTERS ×
Search for filters Q
e Interactions
MEDIA TYPE
QUEUE
Search for queues Q
SKILLS
Search for skills Q
LANGUAGES
Search for languages Q
DIRECTION
Journey
External Contact

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.

00	Activity Direc	tory 🗸 Docum	ients Per	formance 👻								Off Queue
	My Performance	: +										
	Performance	Statuses Evaluati	ions Interac	tions Sched	ule Develop	ment						
☆	0		<u>~</u>			 April 	2024 🔸					0.5 7 1 9
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?									30 intervals	Ø	Consult Transfer	•

Click the save button to save your desired view.

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Save view			×
Save View As	Overwrite Existing View		
View Name			
Enter view name			
Default time period			
None			~
Save	Cancel		

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.

Performance Statuses	Evaluations I	interactions Sch	tedule Scorecard	Development					
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() Chart Unavailable Select a c	olumn in the summary	row.							
0									
interval •	Answer	Handle	Avg Handle	Avg Talk	Avg Hold	Arg ACVI	Hold	Transfer	1
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9:30 AM		×	÷.	<u>_</u>	÷		14	20	
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10:30 AM		-							
11:00 AM	100		-		-	-	-		
11:30 AM				1		1		5	
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12:30 PM	1.00	- X	- 51	3			12	- 8	
1.00 PM				2	-	10			
1:30 PM	34 C	3	4.1.460	4m 15s		16s		1	
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3:00 PM				24	1	12	1		
3:30 PM		1	10	24 - C	1	1		1	

Metric	Description	Live Update
<u>Answer</u>	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
<u>Handle</u>	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.	Yes
	Calculated: Includes talk time, hold time, and after-call work. For outbound calls it also includes dialing and contacting time.	

<u>Avg Talk</u>	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	<u>The average amount of time agents spent</u> <u>completing after-call work.</u> <u>Calculated: Total ACW / Interactions with ACW</u>	Yes
Hold	The number of interactions with holds.	Yes
<u>Transfer</u>	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.

My Personance 1 My Oleves ALL 1										
Performance Statuses	Evaluations Interac	Austions interactions Schedule Scorecard Development								
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8:30 AM	30-01	30-01	30-01							
9.00 AM	30-05	30-01	30-01	+			14	- 43		
9:30 AM	30m 0x	61.54)	6~ 54s		23** 61			23+ 61		
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10:30 AM	30-0s				30-01			30-: 0s		
11.00 AM	30-05	11=158	11=15s	÷.	18m 45s	15m 48s	1.4	2= 573	*	
11:30 AM	30m 0a	21= 401	21= 431		0=171	41s		70.361		
12:00 PM	30=01	4	2	3	30m 0s			30m 0s	1	
12:30 PM	30±0s				30-01			30- 0s		
1.00 PM	30m.0s				30=01			30m 0s		
1:30 PM	30-0s	22m 51s	22= 50s		7 = 93	2=441		3=251		
2:00 PM	30-00	2011 381	20= 381		911221	7m 321	81	75	3 = 37s	
2:30 PM	30 0s			3	30 01	30-01				
2.00 PM	30-01			3	30=01	30~01				
3:30 PM	30-01	- 22 - 22	2	1	30-0x	30-01		4.5	- 20 C	

Metric	Description	Live Update
Logged In	The total amount of time a user is logged in for the specified period.	Yes
<u>On Queue</u>	The On Queue metric represents the number of agents that are on queue for a specific queue.	<u>Yes</u>
<u>Idle</u>	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.	<u>Yes</u>
<u>Off Queue</u>	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
<u>Break</u>	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

20

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

8	Activ	N. D	ectory - Document	Performance +		in the second			•	0	۵.	•0 •	ff Queue
• \$	3 P C	ertormano rtarmanor	e I My Status Statuses Evaluations	I My Interactions I	My Queues Act. I Scorecard Development	•	< November 6, 2024 +		Last updated: N	overnber 7, 2024 10.42 PM	0 0) V .	£ 5
e	0	Users		Servie		Date +	Conversation Du	rat. Deeclion	Gueve	What the			۲
ø	0.	1.00				Wed, Nov 6, 2024 1-43 PM	\$~31(Intround/Outbound	WinDells, Instrum, KFERS, SEET, Parent, Eng. Dierflow, Event, handling	Default Wrap up Code			1

Metric	Description		
<u>Users</u>	The internal users alerted or involved.		
<u>Remote</u>	Information about the external participants.NotePII is masked in this view.		
<u>Date</u>	The date the interaction started.		
Conversation Duration	<u>The length of the interaction.</u> <u>Calculated: (Conversation End – Conversation Start)</u>		
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.

8	Activity Directory	- Documenta	Performance +								 	eue
•	My Performance I	My Status 1	My Interactions	My Queues Ad. 1 +								
☆	My Queues Activity										Um 2 8 7	0
6	Name .	Wating	Interactions	Service Level % Interval Day	On Queue	Off Queue		Interacting	Communicating	ide	Not Responding	0
۵	WisDHS_Training	0	0		0	0	• 0 • 0	0	0	0	0	
20												

Metric	Description	<u>Live</u> Update
<u>Name</u>	The name of the queue.	<u>Yes</u>
Waiting	The number of interactions that waited in the queue.	<u>Yes</u>
Interactions	Image: Interaction of interactions assigned to that queue that agents are currently interacting with.	
On Queue	Queue The number of agents that are on queue for a specific queue.	
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.	<u>Yes</u>
Interacting	The number of agents working with interactions. The number includes agents completing after call work.	<u>Yes</u>
<u>Communicating</u>	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.	<u>Yes</u>
Idle	The number of agents who are on queue and available to take interactions but who are not working with interactions.	<u>Yes</u>
<u>Not</u> <u>Responding</u>	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.	<u>Yes</u>

4 Call Handling

<u>4.1 Receiving a Call From a Queue</u>4.1 Receiving a Call From a Queue (Video instructions available: <u>Receiving a</u> <u>Call From a Queue</u>)

4.1.1 Go On Queue

4.1.1.1 Notification of Call

4.1.1.2 Ending a Call

4.1.2 Agent Training Call Flow

4.1.2.1 Receiving a Practice Call From the Queue

4.2 Making an Internal Call (Genesys User to Genesys User) (Video instructions available: Making an Internal Call)

4.3 Making an External Call4.3 Making an External Call (Video instructions available: Making an External Call)

4.4 Placing a Call on Hold

4.5 Transferring a Call

4.5.1 Transferring a Call4.5 Transferring a Call (Video instructions available:- Transferring a Call)

4.5.2 Conference 4.5.1 Transferring a Call to an XFERS Genesy Queue

4.5.2 Transferring a Call to a Genesys Agent

4.6 Conference (Video instructions available: Conference)

4.5.3 Consult 4.6.1 Start a Conference

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

4.7 Consult (Video instructions available: Consult)

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

4.7.2 Transfer the Second Party to the Third Party

4.7.3 Bring All Parties Together in a Conference Call

4.8 Expanding the Interactions Pane

4.9 Automated Telephonic Signature (ATS)

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

<u>4.1.1 Go On Queue</u>
<u>4.1.1.1 Notification of Call</u>
<u>4.1.2 Ending a Call</u>
<u>4.1.2 Agent Training Call Flow</u>
<u>4.1.2.1 Receiving a Practice Call from the Queue</u>

(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:



<u>4.1.1.1</u> 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.



<u>4.1.1.2</u> Ending a Call

Click the end call button to end the call.

ő	Activity Directory 🕶	Documents	Performance 👻
0	Conversations	6	C 0:09
☆		+	
S	G		Caller Information Dialed Number
		+	Queue: Interaction ID 1efdc608-14e7-4725-adae-fc760f2374bf

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<u>continues</u> 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.

	ල ්ටි Genesys	Cloud.
M	Email Address	DHS.Genesy.
	Password	[Change Organization]
	Americas (US West) [change]	
	Log In	
	Forgot Your Password?	

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.

8	Activity Directory - Documenta	Performance + Q Q	Off Queue
•	Conversations 💿 🗞		0
☆	1		
S	(
ຝ	Start new outbound conversations		
20	Ge On Queue		
	to begin accepting new conversations	0	
		No active conversations	

- 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.

conversations 🛞 6			4
Q ₀ matrix, turns	0 0		
	Code 2 After Call Your Call You	to many to to to to to to to to to to	
	Hours	Contact Information	

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



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

Conversations	C 217	Con	Q
CONTRACTOR OF	誰⊕゠→忽ぬ♀	0 F	e
WIDHE.Darring	Caller Information Caterilo: W: Ousue, Language: @ WaCHS_Training English Interaction ID: Dated Number Call Type bebound Call Automated Telephonic Signature I Language Prompt ID * I Start Prompt ID * Pause Previous © Period Pause Previous © Period		

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

- 🗘 💿 On Queue 8 0 1241 0 Conversations 06 C. Maria 1000000 () E WisDHS. Training Caller Information 0.08 just now tel. CallerID: Find wrap-up code Q. Queue, Language Q WisDHS_Training English Default Wrap-up Code Interaction ID Dialed Number Call Type: Inbound Call Automated Telephonic Signature • * Prompt ID Language - Start O Faute O Flay in Re nic Signature ID. Toles Copy O End Whip-up code is set. Default Wrap-up Code (2) .
- 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.
 - 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.

00	Activity Directory -	Documents	Performance -
0	Conversations	© ©	Make Call
<u>_</u> ^_		+	Both fields are required
м 1000-	100 A	16 hrs	
	Do not use this button		
-5-4	for external calls	+	Please enter a number or contact
ې ې		17 hrs	R
		16 hrs	
		16 hrs	Open dialpad Emergency Address 🖉 A Primary number not found.



4.3.1 Ending a Call

Click the end call button to end the call.

ő	Activity Directory 👻	Documents	Performance 👻
0	Conversations	\$ \$	<u>۵</u> 0:09
\$7 €		+	$\begin{array}{cccc} & & & & \\ & & & \\ & & & \\ $
		+	Queue: Interaction ID 1efdc608-14e7-4725-adae-fc760f2374bf

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.

Activity Directory -	Documents	Performance 👻		٩		:
Conversations	¢ C	8	0:15			3
	+			0	F	٦
	just now	Caller Information Dialed Number tel: Queue: Interaction ID a6b26600-4961-4066-8eda-6dea9695f1 Call Type: Inbound Call Automated Telephonic Signature	After Call Work (Optional) Find wrap-up code Default Wrap-up Code			0:10 a
			Default Wrap-up Code 🛱		Done	e

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

4.5 Transferring a Call

<u>4.5.1 Transfering a Call</u> (Video instructions available: Transferring a Call)
<u>4.5.2 Conference</u> (Video instructions available: Conference)
4.5.3 Consult (Video instructions available: Consult)
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.

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0	Conversations	© &	C 0:07
☆	S		$\begin{array}{cccccccccccccccccccccccccccccccccccc$
Ś			Q Enter name, number or queue

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.



<u>4.6</u> Conference

<u>4.6.1 Start a Conference</u> <u>4.6.2 Place a Conferenced Party On Hold or Remove Them From the Call</u>

(Video instructions available: <u>Conference</u>)

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.

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☆				
S	6		Conference	After Call Wo
<u></u>				

<u>4.6.2</u> 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

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

4.7.2 Transfer the Second Party to the Third Party

4.7.3 Bring All Parties Together in a Conference Call

(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.

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0	Conversations	\$ \$	C			Q	0:06
は し [C.			Q	11	\rightarrow	Consult

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

- 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.

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Caller Information						
aller nformation alert0 anouspe:						
Caller Information CalerID Anguage: Dueve						
Caller Information Language: Jueue: Interaction ID 3	1;120e1-0e66-4031-0110-508e69822ce7					

4.7.2 Transfer the Second Party to the Third Party

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

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aller					
Caller Information					
Caller Information CalenD					
Caller nformation CalentD Language:					
Caller nformation CalertD Language: Surver					
Caller Information CaleriD Language: Dueue Interaction ID 3	12de1-0e68-4031-0118-1508ef882ca7				

4.7.3 Bring All Parties Together in a Conference Call

Click the conference button to bring all parties into the call. 3.26 B 11 P * Ш Þ ٠ \rightarrow -11 Caller Information CalentO Language: Queue. Interaction ID 3fc12de1-0e68-4031-b11b-f9b8ef882ca7 Origin

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.



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S	8	Caller Information Dialed Number: tet Queue:	After Call Work (Optional) Type your notes here (no personal data)
۵		Interaction ID: Call Type: Outbound Call Automated Telephonic Signature	
2			
		Language Prompt ID	
		ф. Start	
		Playse Play Play Previous Restart Telephonic Signature ID:	
		Сору	
		C.End	
0		v1.8	

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

6.1 Introduction to Performance6.1 Introduction to Performance

6.1.1 Viewing Agent Performance Statistics (Video instructions available: <u>Viewing Agent Performance</u> <u>Statistics</u>)

6.1.2 Viewing Agent Status 6.1.2 Viewing Agent Status (Video instructions available: Viewing Agent Status)

6.1.2.1 Agent Status View

6.1.2.2 Status, Secondary Status, and Routing Status

6.1.2.3 Add Secondary and Routing Status to the Agent Status View

6.1.3 Viewing Queue Activity (Video instructions available: Viewing Queue Activity)

6.1.4 Viewing Queue Performance (Video instructions available: Viewing Queue Performance)

6.1.5 Viewing Interaction Details (Video instructions available: Viewing Interaction Details)

6.1.6 Creating a Dashboard (Video instructions available: <u>Creating a Dashboard</u>)

<u>6.1.7 Exporting or Scheduling a Report</u>6.1.7 Exporting or Scheduling a Report (Video instructions available: Exporting Reports)

6.1.7.1 Export a Report

6.1.7.2 Schedule a Report

6.1.8 Expiring Reports

6.1.8.1 Renewing Reports (Video instructions available: Renewing Reports)

6.2 Supervising Agent Calls

6.2.1 Coaching and Monitoring Agents (Video instructions available: Coaching and Monitoring Agents)

6.2.2 Selecting a Call to Review (Video instructions available: Selecting a Call to Review)

6.2.3 Logging an Agent Out of Genesys (Video instructions available: Logging an Agent Out of Genesys)

6.2.4 Taking an Agent Off Queue

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

6.1 Introduction to Performance

6.1.1 Viewing Agent Performance Statistics (Video instructions available: <u>Viewing Agent Performance</u> <u>Statistics</u>)

6.1.2 Viewing Agent Status 6.1.2 Viewing Agent Status (Video instructions available: Viewing Agent Status)

6.1.2.1 Agent Status View

6.1.2.2 Status, Secondary Status, and Routing Status

6.1.2.3 Add Secondary and Routing Status to the Agent Status View

6.1.3 Viewing Queue Activity (Video instructions available: Viewing Queue Activity)

6.1.4 Viewing Queue Performance (Video instructions available: Viewing Queue Performance)

6.1.5 Viewing Interaction Details (Video instructions available: Viewing Interaction Details)

6.1.6 Creating a Dashboard (Video instructions available: Creating a Dashboard)

<u>6.1.7 Exporting or Scheduling a Report</u>6.1.7 Exporting or Scheduling a Report (Video instructions available: Exporting Reports)

6.1.7.1 Export a Report

6.1.7.2 Schedule a Report

6.1.8 Expiring Reports

6.1.8.1 Renewing Reports (Video instructions available: Renewing Reports)

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

6.1.2.1 Agent Status View

6.1.2.2 Status, Secondary Status, and Routing Status

6.1.2.3 Add Secondary and Routing Status to the Agent Status View

(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, <u>SEE SECTION 6.1 SUPERVISOR DESKTOP</u>.

Viewing

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<u>ڳ</u>	•	1 day 11h 27m 58s	Offline	18 days 15h 23m 0s	15h 32m 21s	2m 48s	-	17 days 23h 50m 40s	17 days 23h 34m 45s	2s	-	-		
	•	7 days 8h 3m 23s	Offline	5 days 6h 17m 30s	14h 3m 2s	8h 2m 20s	19s	4 days 16h 14m 28s	4 days 16h 14m 28s	-	-	-		
	•	57 days 5h 48m 26s	Offline	-	-	-	-	-		Totals for	each agent			
	•	1 day 4h 57m 56s	Offline	14 days 1h 11m 28s	-	-	-	14 days 1h 11m 28s	14 days 1h 11m 28s	•				
	•	83 days 12h 0m 50s	Offline	-	-	-	-	-	-	-	-	-		
	•	50 days 5h 42m 3s	Offline	-	-	-	-	-	-	-	-	-		
	•	6 days 1h 55m 16s	Offline	3 days 12h 54m 26s	2 m 28 s	2m 22s		3 days 12h 51m 58s	3 days 12h 51m 58s	-				
	•	5 days 9h 58m 31s	Offline	4 days 18h 51m 46s	22h 17m 56s	20h 19m 25s	1m 40s	3 days 20h 33m 50s	3 days 20h 26m 57s	3s	53s			
		1 day 6h 23m 48s	Offline	11 days 15m 46s	2 days 17h 36m 58s	1 day 19h 50m 42s	1m 22s	8 days 6h 38m 48s	8 days 6h 38m 48s	-	-	-		
?					~	< 1	> >>					1 - 17 c	of 17 age	ents

<u>6.1.2.2 View Status,</u> 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

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	Agent Status 1	+													
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	0.	189 caja 2+ 28+ 434	office	Office			Officience								
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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

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

Performance	Statuses Evaluat	tions Insights	Leaderboards	Development								
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	Time in Stat	Status	Logged In	On Queue	Idle	Not Respon	Off Queue	Available	Away	Break	Meal	
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(i) Chart Unavailable	Select a column in the	e summary row										Q Search Columns
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	s 20h 40m 43s	Offline	•	-	-	-	-	-	-	-	-	
•	91 days 3h 39m 51s	Offline			-				-			Not Responding On Queue
	57 days 21h 21m 3s	Offline							-			Idle %
•	13 days 17h 34m 16s	Offline							-			Interactions Log in
	4 days 21h 30m 3s	Offline	•									Log out
	2h 23m 23s	Available	11h 29m 39s	7h 58m 38s	7h 54m 8s		3h 31m 2s	3h 31m 2s			-	Media Types
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•	. 89 days 37m 15s	Offline	•	•	-		•	•	•			Routing Status Secondary Status
•	15 days 4h 46m 21s	Offline				-						Skills
•	40m 34s	Available	1h 47m 29s	•			1h 47 m 29 s	1h 47m 29s			-	Status
•	1m 3s	Available	6h 53m 23s	-	-	-	6h 53m 23s	6h 53m 23s	-	-	-	Time in Status
												O Title

The selected columns are added to the view.

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	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	225	23h 53m 58s	23h 53m 58s	-	-	-
Chart Unavailable Se	lect a column in the s	ummary row											
Agent 🔻	Time in Status	Status	Secondary St	Routing Status	Logged In	On Queue	Idle	Not Respond	Off Queue	Available	Away	Break	Meal
•	1 day 21h 37m Os	Offline	Offline	Off Queue		-						-	-
	1h 4m 31s	On Queue	On Queue	Idle	1h 22m 59s	1h 4m 3s	54m 9s	225	18m 56s	18m 56s	-	-	
•	1 day 20h 32m 9s	Offline	Offline	Off Queue								-	-
•	20h 43m 59s	Offline	Offline	Off Queue			÷				÷	-	-
•	91 days 3h 43m 6s	Offline	Offline	Off Queue		-						-	-
•	57 days 21h 24m 19s	Offline	Offline	Off Queue		-	-					-	-
•	13 days 17h 37m 32s	Offline	Offline	Off Queue		-	-			-		-	-
. •	4 days 21h 33m 18s	Offline	Offline	Off Queue		-	-	-			-	-	-
•	2h 26m 38s	Available	Available	Off Queue	11h 39m 48s	7h 58m 38s	7h 54m 8s		3h 41m 10s	3h 4 1m 10s	-	-	
•	2h 36m 14s	Offline	Offline	Off Queue	10h 20m 25s	•	-	-	10h 20m 25s	10h 20m 25s	-	-	•
•	23h 7m 46s	Offline	Offline	Off Queue		-	-	-	-	-	-	-	-
•	15 days 5h 29m 23s	Offline	Offline	Off Queue			-					-	-
• •	89 days 40m 31s	Offline	Offline	Off Queue									-
•	15 days 4h 49m 37s	Offline	Offline	Off Queue		-						-	-
•	43m 50s	Available	Available	Off Queue	1h 57m 38s			-	1h 57m 38s	1h 57m 38s			-
	4m 19s	Available	Available	Off Queue	6h 57m 14s		-		6h 57m 14s	6h 57m 14s	-	-	
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						« <	> >>						1 - 17 of 17 ager

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.

Click the export button to open the export panel. 🗘 💿 Off Qu Agent Status : Agent Status Scheduled Exp... i + Performance Statuses Evaluations Insights Leaderboards Development ۹ 🗠 ⊡ ຂ ⊻ ໆ April 2024 Time in Stat. Statu Logged In On Queue Idle Not Re Off Queue Available Export 96 days 20h 25m 53s 14 days 7h 24m 56s 8 days 22 56m 30s 1 day 8h 7m 57s 82 days 13h 0m 57s 82 days 8r 15s N/A N/A 11s 56s 51 m 3s Export Name (Chart Unavailable Select a olumn in the su 2024-05-24 Agent Status Summary Agent 🔻 Time in Stat... Status Logged In On Queue Idle Not Respon Off Queue Available Awa Break Mea æ 8m 13s 🔿 Agent Log In - Log Out Details 🛈 14 days 1h 14 days 1h 14 days 1h 6h 36m 36s Offline Agent Status Timeline Details 11m 28s 11m 28s 11m 28s Agent Status Duration Details (1) 100 days 8h 29m 10s □ ● Jŧ H Offline Recipient 1 day 5h 23m • Offline Enter up to 10 email addresses 41s 22 days 22h 23m 36s 3 days 12h 54m 26s 3 days 12h 3 days 12h . Offline 2m 28s 2m 22s 51m 58s 4 days 18h 3 days 20h 3 days 20h • 22h 17m 56s 20h 19m 25s 1m 40s 1h 20m 5s Offline 35 53s 51m 46s 33m 50s 26m 57s Forma 11 days 15m 2 days 17b 1 day 19h 8 days 6h 8 days 6h 38m CSV 2h 52m 19s Offline • 1m 22s 465 1 day 14h 1 day 18h 1 day 14h • M 6h 49m 53s Offline 3h 32m 36s 38m 57s Include all colur 37s 10m 13s 37m 38s 37m 38s 1 day 1h 33m 31s Offline 10 days 11h 2 days 3h 3m 1 day 15h 11m Os 8 days 8h 8 days 6h 35m 12s 2s • 0.182: 12s Schedule 6h 12m 45s 41m 45s 38m 31s 15s • 14h 35m 56s Offline 6h 29m 9s 6h 29m 9s 6h 29m 9s Formatting 98 days 5h 26m 35s • Offline 2 days 9h 35m • Offline 1b 51m 40s 57m 1s 38m 34s 42≈ 54m 40s 54m 40s 41= 6 days 19h 2 days 5h 4 days 14h 4 days 12h • Ri 13h 50m 10s 15m 39s 5s 3s 3s 9h 24m 2s Available 48m 6s 29m 26s 18m 40s 34m 52s 1 day 1h 34m 16 days 10h 4 days 20h 3 days 16h 11 days 13h 11 days 13h 🗆 🔹 🤻 2h 40m 43s Offline 17m 46s 31m 22s 44m 32s 53s 46m 50s 46m 50s 9 days 8h 52m Offline 3 days 16h 3 days 16h 3 days 16ł 🗆 🔹 SI 5m 22s 2m 25s 59m 40s 54m 18s 54m 18s « < **1** > » 1 - 18 of 18 agents Export Cancel

×

1.

2. Optionally, enter a name <u>for</u> the exported file or accept the default.

	Export	×
2	Export Name * 2024-05-24 Agent Status Summary	×
Displays only for agent status reports	 Agent Log In - Log Out Details (1) Agent Status Timeline Details (1) Agent Status Duration Details (1) 	
4	Recipients Enter up to 10 email addresses	
5	Format CSV Include all columns	
7	Schedule	~
8	Formatting	~

- 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 <u>Schedule a ReportSee Schedule a Report</u> 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.

Formatting ^
Duration Format Millistonds
Milliseconds Seconds
HH:MM:SS
H:M:S
Language
English (US)
Delimiter
Comma (,) 🗸 🗸
Include Summary Row
Exclude Empty Rows

9. Click Export-_to send the report.

<u>6.1.7.2</u> Schedule a Report

To schedule a single or recurring future report, complete steps 1-6 in $\frac{\text{EXPORT A REPORTSECTION}}{6.1.7.1 \text{ EXPORT A REPORT}}$, 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.

Schedule	^
Frequency	
🔿 Run Once 💿 Recurring	
View existing export schedules	
Time period	
Last week 🗸 🗸	
Recurrence	
Weekly 🗸	
Day of week	
Monday	
Request Time 8:00 AM (S	

- 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 <u>Step 8, above.SECTION 6.1.7.1 EXPORT A REPORT, STEP 8.</u>
- 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:

Frequency Run Once Recurring View existing export schedules Formatting	Schedule	^
Run Once O Recurring View existing export schedules Formatting	Frequency	
View existing export schedules	Run Once ○ Recurring	
Formatting ~	View existing export schedules	
,	Formatting	~

Opening export schedules from a new tab:

00°	Activity	Directory - Documents Performa	nce	 Admin) ¢ 🗩	Off Queue
	New Tab	i +								
	Select a view to	o load by clicking its name:								
☆	Default	Q Search Views		Saved					Q Search Saved Views	
S	Time zone	America/Chicago (UTC-05:00) (Local and Works	~	Name 🔻	Base 🔻	Time Period	Time Zone	Entities	Entity Count	
-•	Dashboard	d Owners	•	Agent Group Performance	Agent Performance Base	None			_ 3	8
2	Dashboard	ds		Test	My Interactions	None		-	0	1
දි	Employee En	igagement ^								
	Agent Dev	elopment								
	Agent Eval	luation								
	Insights									
	Leaderboa	ards								
	My Develo	pment	ii.							
	My Scorec	bard								
	My Performa	ance ^	l							
	My Develo	pment	L							
	My Evaluar	tions	L							
	My Interac	rtions	L							
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	My Schedu	uie								
	My Statue	aru	L							
			I.							
	Other	^								
	Alert Rules	5								
?	Scheduled	I Exports	•							

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

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-		Scheduled Exports										
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Q.	~	Base	Name 2024-05-25 Agent Status	Schedule	Chicago (UTC 05:00)	Time Period		Destination	Enabled	Auto disable in	Granularity	
8	Ť	Agent Status	Summary	Every Monday at 6.00 AM	Chicago (01C-05.00)	Last week	Ctatus		tes	oo uays	: 0	
6		Jun 3. 2024 8:00 AM					Completed				1	-
		May 27, 2024 8:01 AM					Completed					
20										Enable/Disable Run Now Edit Schedule Renew Schedu Delete Schedu	Schedule e	
?					40	< <		>>			1 - 1 of	1 export schedules

6.1.8 Expiring Reports

6.1.8.1 Renewing Reports

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



<u>6.1.8.1 Renewing Reports</u> (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.

	Select a view to load by clicking its nam	145						
ਸ	Default Q 4	Search Views		Saved			Q, Search Sav	ed Views
C	Time zone America/Chicago-(UT	TC-06:00) (Local and Wor	a. v	Name •	Ease •	Time _ Time Zone	Entities	Entity
A	Insights		•			No data available		
-	Leaderboards							
20	My Development							
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	My Status		- 1					
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	Other		1					
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- 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.

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۵	Myonuschura	Date My Interactions	Dwg Tandag Wetherday, Thursdae, Pintes Saturday at 12011 AM	Change (275-0008)	Nuteriag	and the second	carative No.	O tuped	NA I
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37									

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

7 Local Administrator

7.1 Setting Business Events - Emergency (Video instructions available: Setting Business Events - Emergency)

7.2 Setting System Business Events - Meetings7.2 Setting System Business Events - Meetings (Video instructions available: Setting Business Events - Meetings)

7.2.1 Scheduling a Meeting Business Event

7.2.2 Creating Multiple Meeting Business Event Schedules

7.2.3 Cancelling a Business Event Schedule

7.3 Setting Business Events – Special Messages

7.4 Setting Holidays (Video instructions available: Setting Holidays)

7.5 Assigning Queues7.5 Agent Accounts

7.5.1 Requesting Access for a New Agent

7.6 Assigning Queues (Video instructions available: Assigning Queues)

7.6 Assigning Languages 7.6.1 Assign or Unassign a User From a Queue

7.7 Assigning Languages (Video instructions available: Assigning Languages)

7.7.1 Assign Agent Skills – English

7.7.2 Assign Agent Skills – Spanish

7.7.3 Assign Agent Skills - Hmong

7.2 Setting Business Events - Meetings

7.2.1 Scheduling a Meeting Business Event

7.2.2 Creating Multiple Meeting Business Event Schedules

7.2.3 Cancelling a Business Event Schedule

(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: <u>dhsgenesyscloudproject@dhs.wisconsin.gov</u>, 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.

Emergency Groups	home x V Name Home_Mesting_Schedule Home_Schedule,Group	Open 0500-2200 M-F 0500-2200 M-F	Closed Home_Meeting_1, Home_Meeting_2	Boliday C2 Holiday 2024 Christmas Eve (State Holiday), 2024 D	Copy Customize	3 + 1
	Home_Neeting_Schedule Home_Schedule_Stroup	Open 0500-2200 M-F 0500-2200 M-F	Closed Home_Meeting_1, Home_Meeting_2	Holiday - 2024 Christmas Eve (State Holiday), 2024 D	Time Zone America/Chicago America/Chicago	
	Home_Meeting_Schedule	0500-2200 M-F 0500-2200 M-F	Home_Meeting_1, Home_Meeting_2	- 2024 Christmas Eve (State Holiday), 2024 D	America/Chicago America/Chicago	
	Home_Schedule_Group	0500-2200 M-F	-	2024 Christmas Eve (State Holiday), 2024 D	America/Chicago	
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	Name	▼ Open	Closed	Holiday	Time Zone	
	Home_Meeting_Schedule	0500-2200 M-F	Home_Meeting_1, Home_Meeting_2	2 -	America/Chicago	

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.

00	Activity Directory 👻	Documents Performance * Admin				Q ¢	Off Queue
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☆	Operating Schedules	Schedule Group					
0	Emergency Groups	(Note: The open, closed, or holiday state of this sch	nedule group could not be deter	mined because you do not have Routing > Schedule >	View permission to all of the assign	ed schedules.	
S		🐼 Overview 🕓 Schedules 🛱 Calendar					
6		Open Schedules		Closed Schedules		Holiday Schedules	
≔		Add existing schedules	~	Add existing schedules	~	Add existing schedules	~
දු		- 0500-2200 M-F	Û	- Home_Meeting_1	Û	No holiday schedules are assigned	
				- Home_Meeting_2	Û		
0		Save Cancel					
0							

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.

ő		Documents Performance 🔻 Admin					Q 4 (Off Queue
	Routing / Operating So	chedules						
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			Occurs Friday, Ma	rch 29, 2024 from 1:55 PM to :	:00 PM			
			0					
		_						
?		Save Cancel						

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

o Activity Directory	Documents Performance Admin	🔍 🇘 💿 Off Queu
Routing / Operat	ting Schedules	
Operating Schedules	Schedule	
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	Division * Home Only people with Routing > Schedule > View permission in this division can use this schedule.	Upcoming Occurrences 🗂
	When does the schedule first occur and repeat?	No upcoming occurrences
	Never (a one-time event)	« < > »
		Usages This schedule is referenced on the following items.
		Schedule Groups 0 V
		Architect Flows
1	Save Canoel	

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.

WEEKIY	~
When do	es this schedule occur during the week?
Days	Mo Tu We Th Fr Sa Su 📸 Week Start
Every	1 🗘 week(s
When do	es this schedule stop repeating?
When do Never O On	es this schedule stop repeating? 04/29/2024 🗂 🗹 End of day 🕝 Fixed (UTC)

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

Routing / Operating Sc	chedules										
Operating Schedules	Schedule										
Emergency Groups	Schedule Details				Occurs	5					
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Genesys User Guide Release 24-01

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, <u>SEE SCHEDULING A MEETING BUSINESS</u> EVENT

7.5 Agent Accounts

7.5.1 Requesting Access for a New Agent

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. <u>Complete the Genesys Cloud CX Provisioning Sheet.</u>
 - 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.

7.57.6 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 <u>7.5</u> <u>ASSIGNING LANGUAGES</u> 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.

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R	✓ 2/16/2024	o	rssemy@gmail.com	Home	Never	
R	✓ 5/29/2024	17	sramya.ramee@gmail.com	Home	Never	
D R	✔ 6/6/2024	5	richard2.johnson@dhs.wisconsin.gov	Home	Never	
	✓ 3/5/2024	25	rossie.knighton_jr@genesys.com	Home	Never	

3. Select the Queues tab.

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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.

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7.67 Assigning Languages

7.7.1 Assign Agent Skills – English 7.7.2 Assign Agent Skills – Spanish 7.7.3 Assign Agent Skills – Hmong

(Video instructions available: <u>Assigning Languages</u>)

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.

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

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

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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.

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

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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.

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

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8. Click Save.

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8 Reserved



10 Reserved

11 Troubleshooting

11.1 Accessing Genesys Troubleshooting

- 11.1.1 Who Should Submit a Ticket?
- 11.1.2 Opening a Ticket
- 11.1.3 Escalation Process
- 11.1.4 Prioritization

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.
- <u>1.2.</u> 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 <u>Genesys</u> <u>Portal page</u>. 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 <u>Genesys</u> <u>Portal page</u>. 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 <u>SECTION 11.6</u> <u>SUBMITTING A GENESYS SUPPORT TICKET</u>.
	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

11.1.1 Who Should Submit a Ticket?

11.1.2 Opening a Ticket

11.1.3 Escalation Process

11.1.4 Prioritization

<u>Users</u> 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.govdhsgenesyscloudproject@dhs.wisconsin.gov

Examples of general questions include:

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

11.61.1 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

11.61.2 Opening a Ticket

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

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

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 Usernameemail
- Genesys <u>Placephone</u> 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<u>an example of the page</u>

▷ Send ~	۰ ا
To helpdesk@wi.gov	
Cc	
Всс	
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 l When I attempt to log in, I get the following error	og in yesterday.
Genesys Cloud.	
The credentials you entered are invalid. Please check your email address, password, and organization name and try again.	
[Change Organization]	
Americas (US West) [change]	
Log In	
Forgot Your Password?	
Thanks	

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

11.61.3 Escalation Process

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

_For "Critical" or "High" priority issues, cc <u>dhsgenesyscloudproject@dhs.wisconsin.gov</u> 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-<u>dhsgenesyscloudproject@dhs.wisconsin.gov</u>.

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

<u>Tickets opened with the Wisconsin Help Desk are prioritized base on impact to the call center</u>. 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
<u>Critical</u>	Renders entire system unusable with no workaround.	Immediate
<u>High</u>	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.	<u>Immediate</u>
<u>Normal</u>	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.

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

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

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

2.3 Forgotten Credentials (Video instructions available: Forgotten Credentials)

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 <u>Genesys Portal</u>. 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.



Serverses Markenage	
Tenant	
sowi.mgep.info	
Username *	
Remember me	
Next	
4	
5. Select Next. 6. Complete the Username and Password fields with your case Wisconsin DEPARTMENT of HEALTH SERVICES	esensitive WAMS log in information.
Secure Logon for DHS-GENESYS Username	
Password	
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: <u>Logging off the Agent Desktop</u>) 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:

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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 <u>Section 7 Supervisors</u> and <u>Section 8 Segment</u> <u>Administrators</u>).

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:

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

🚨 Tear	
🜲 С. тур	
Notifications	
Rotifications	
	
- 00	Indicates any potential errors in the system.
Voicemail	
Xoicemail	
Shared Voicemail DM	Indicates when any voicemails are in assigned queue.
Performance Tracker	Provides information on the number of internal, outbound, and inbound calls for the day.

Performance Tracker	
Internal Calls	
Outbound Calls	
Inbound Calls	
Help	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.

Help	
i icip	
🔾 Search	
Browse below or enter a search term abo	
Agent Desktop Help	
Getting Started	
Using the Agent Desktop main window	
Inbound interactions	
Connecting to your customers	
Chai	
Email	
Email	
Voice	
VUICE	
Outbound Campaigns	
Golus Adapter for Salesforce Lightning	
Help for Gplus Adapter for Salesforce	
Logging in and out	
Working with Gplus Adapter for Sales	

Top Navigation Bar

Г

The Top navigation bar links to:

	Shows the media you use, your current
Connect View Tab	status, and previous calls. <u>See 3.2</u>
	Connect View Tab

T

00°	Workspace Conne	ct Monitor			
	My Channels	My History	Inte	raction Sear	
1	Media		Status		
ഫ	🕒 voice		🕒 Not	: Ready - Login	
Monit	tor View Tab				
ő	Workspace Connect M	Ionitor			
	Dashboard				
	Contact Center Resource			Average Waiting Tir	ne
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.11					
Agent	:s Status				
0	Michael W				
Main	Menu				
2	<u></u>				

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

8 WORK	space Connect	Monitor		Average Waitin	g Time 🕘 🗸 🗸	Michael W	- × 🙎
<u>.</u>	My Channels	My History	Interaction Sear				
All	Last Month	Last Week I	Last Day	search		AQ	vanceti search
	Status	Subject		Start Date	÷	End Date	
; use the	Advanced sear	ch feature to set s	pecific search	criteria by dat	e.		1
		Average Waiting Ti	ime - 🗸	L	~	<u> </u>	
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ere are th 1.—Sel	Quick Search e steps to sear lect the date ra Workspace My chann Add condition	ch for a call using / nge from the drop connect Monitor rels My Histor	Advanced sear Hown menu. Ty Interact iitions O Match An	Ch: (Start Date, Er ion Sear y Condition	dvanced sea Id Date).	arch	
ere are th 1. Sel	Quick Search	ch for a call using / nge from the drop Connect Monitor rels My Histor	Advanced sear -down menu. ry Interact itions O Match Ang	ch: (Start Date, Er ion Sear y Condition	<u>dvanced sea</u> Id Date).	arch	
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ere are th	Quick Search	ch for a call using / nge from the drop connect Monitor els My Histor	Advanced sear - down menu. ry Interact ittions O Match An-	ch: (Start Date, Er iton sear y Condition	dvanced sea nd Date).	Start Date	

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

2.—	Select th	e date condition (On, On	or after, Before, Between).		
	ő	Workspace Conne	ect Monitor		
		My Channels	My History	Interaction Sear	
	٤	Add condition $~~$	Match All Conditions	Match Any Condition	
	مە	Start Date 🗸 🛛 On	Lim ~		
		On Search On	or after		
		Bef	ween		
		Status		Subject	
					Ν
3. —	- <mark>If search</mark> i	ing using a date range, cli	ick Add condition and select S	Start Date or End Date.	
	ő	Workspace Conr	nect Monitor		
		My Channels	My History	Interaction Sear	
		Add condition	Match All Conditions	Match Any Condition	
	مە	Status	d another search condition		
		Start Date			
	•••	End Date			
		Subject			
		Status		Subject	

2.-

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

	My Channe	ls	Му	History	Inte	ractio	n Sear											
ļ.	Add condition	× •	Match Al	I Conditions O	Match	Any (Condition											
5	Start Date 🛩	On	v	5/16/2023		0	End Date	~	On	~		2	h t	-	3			
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										No i	14	15	16	17	18	19	20	
											21	22	23	24	25	26	27	
											28	20	30	31		2	0	

Interaction Search

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

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مە													
	S	tatus		Subject		S'			•	End Date			
?													

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 (<u>See 5.4 Transferring a Call</u>).			
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	2 mormation section displays call information for indound and outbound calls.	
9	Workspace Connect Monitor	
	⋮ +1630864: 00:17 < C III ~	
<u>ا</u>	Case Information	^
00	Origin Inbound call to +1540485	
	CallerID +1630864	
	ConnectionID 00b80355db9fa202	
	DialedNumber +1540485	
	Language English	_
	+1630864 Ocnnected	
	Dispositions	^
	Q Quick Search	
	Case Updated	
	Completed Application	
	Referral made	

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.

+1630864			
Origin	Inbound call to +1540485		
CallerID	+1630864		
Connection	D 00b80355db9fa220		
DialedNumb	er +1540485		
Language	English		

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.

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	E +1630864: 00:17 ℃ ℃ Ⅲ ~ ♣ ~ & ~	
	Case Information	^
~~	Origin Inbound call to +1540485	
00	CallerID +1630864	
	ConnectionID 00b80355db9fa202	
<u> </u>	DialedNumber +1540485	
	Language English	
	+1630864 🕓 Connected	
	Dispositions	^
	Q. Quick Search	
	Case Updated	
	Completed Application	
	Referral made	

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.

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8	Team (Commu	nicator		«
÷	Q. Type nat	me or number			
ഹ	✓ ★	L All Ty	pes	~	Group

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

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	Team Communicator	«
٤	Q	×
00	🖌 🛨 🛛 All Types 🗸	Group
•••		
	🔍 🕒 Not Ready - Login	

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 o | call by either hang i | ng up the phone or | selectin | ng End Call. | | | |
|---|------------|----------------------------------|--------------------|---------------------|----------------|------------------|--------------------|--|
| | ő | Workspace | Connect Mo | nitor | | | | |
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| | | • | | • | • • | | | |
| | | Case Informa | tion | | | | | |
| | Once the | e call is complete, y | our status changes | back to | the status bef | fore the outgoin | g 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. Workspace	
•	Wolkspace connect Molitor	
	⋮ +1630864: 00:17 < C III ~	
<u>ا</u>	Case Information	^
	Origin Inbound call to +1540485	
00	CallerID +1630864	
	ConnectionID 00b80355db9fa202	
ш	DialedNumber +1540495	
	Dialeuridindei +1340483	
	Language English	
	+1630864 Onnected	
	Dispositions	^
	Q Quick Search	
	Case Updated	
	Completed Application	
	Referral made	

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:





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.
 - 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

<u>6.1 Retrieving and Deleting a Voicemail</u> (Video instructions available: <u>Retrieving and Deleting a Voicemail</u>) 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.

ő	Workspace	Connect	Monitor		
<u></u>	Voicem	nail			«
-				(B	_
ഹ	Share	d Voicemai		(2 total)	1

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 <u>Genesys Portal</u>.



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.

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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.

Ö	Workspace	Connect	Monitor		
<u>.</u>	Team	Commu	nicator		«
.	с , Туре па	me or number			
	~ ★	L All Ty	pes	~	Group

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.



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.

	: +'	00:35 💋 🛃		
	Case Informa	Ition	itch the monitored voice in	teraction to barge
	Origin	Monitoring of call between	and	
)	CallerID			
	ConnectionID	00b8033172dac7e5		
	DialedNumber			
	Language	English		
	:	Connected		
		Connected		

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	Soloct	tho	Coach	Agent i	con
- · ·	Sciect	the	Couch	-Pene	con.

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	Team Communicator	«
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00	🗸 🛨 All Types 🗸	Group
•		
	Coach Agent	

- 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.

ő	Workspace	Connect Monitor	
	: +	01:22	
<u>ا</u>	Case Informa	ation End the coaching of the voice interaction	
~~	Origin	Coaching of call between and	
00	CallerID		
E III	ConnectionID	00b8033172dac7e5	
	DialedNumber		
	Language	English	
		Connected	
		© Coached	

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.

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- m	A Not Dandy		C Logged Off	
	Witheauy		S Not Ready - Login 00:03:10	
	C Log Off 4		C Logged Off	
			C Logged Off	
	1		C Logged Off	
	1		O Not Ready 20:36:02	
	1		E Logged Off	
			Not Ready - Case Processing 00:03:08	
		5		
?	1 - 10 of 18 10 - per page		cc < 1of2 > xi	

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: <u>Logging in for Quality Management</u>) 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.

WISCONSIN DEPARTM of HEALTH SERVICES	ENT Welcome to yo	ur Wisconsin Departm	nent of Health Service	s MGEP Portal	
Agent Decktop	Platform Administration	Designer	Historical Reporting	Real-Time Reporting	Interaction Recording
<u> 26</u> 2					

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).

	<mark>e</mark> genesys [*]
	SpeechMiner
	Log in to Genesys
	Genesys O Speechminer
	Username *
	Password *
	Log In
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. <u>Search by Date</u>
- 2. Search by Agent Name
- 3. Search by Call Type
- 4. Search by Caller Phone Number

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- 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.

ate Range	All	Agents & Workgrou	ips	
All	_lm_ ^	Include 🗸	Agents	~
All	Â	Include 🗸	Partitions	~
Custom				
Yesterday		Metadata		
Today		Include ¥	Name y Value	s ×
Last Work Day		indiade -	Turre Turre	
Week to Date				
Last 7 Days				
Last Week				
Month to Date				
Last 30 Days	-			

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

Date Range	05/09/23 1	2:00 AM - 05/10/23 12:00 AM	Agents & Workgrou	ips			
Custom		Ť	Include 🗸	Agents		~	+
From:	05/09/23	12:00 AM 🕓	Include 🗸	Partitions		~	+
то:	05/10/23	12:00 AM	Metadata				
			Include 🗸	Name 🗸	Values	~	+

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.

Date Range	05/09/23 12	:00 AM - 05/10/23 12:00 AM	Agents & Workgro	oups		Comments	
Custom		~	Include 👻	4 Agents selected	^ +		
From:	05/09/23	12:00 AM 🕒	Include 🗸	Search	View	selected only	
To:	05/10/23	12:00 AM		All agents			eutra
	00/10/20	12.00 AM	Metadata	> 🗹 Bay_Lake		^	-
			include 🗸	> 🗹 Capital			
Tags				✓			view
Include	✓ Tags	~		🗹 Adam A			
				🗹 Alicia G			_
						-	

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.

⊉						
Interactio	ons () 🗸					
From:	05/09/23	12:00 AM	Include 👻	Partitions	× +	Users
	05.11.0.100					Good Neutral
10:	05/10/23	12:00 AM	Metadata			
			Include 🖌	Name A Values	× +	User Actions
Tags				2 Contraction		viewe
Include	✓ Tags	~		search		ien selected only
				agentid		
				🗌 ani		
				callerPhoneNumber		
				Contactid		.
				CustomerSegment		
						Done

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.									
≜										
Interactio	ons () ~									
From:	05/09/23	12:00 AM	Include	~	Partitions		~	+	Users	
То:	05/10/23	12:00 AM							Good 🗆 I	Neutra
			Include	~	Name fra ^	Values	~	+	User Actions	
Tags Include	✓ Tags	~			Search			🗆 Vie	w selected only	viewe
					agentExt	ensionDN	NT.			_
					🔲 agentid 🚺 ani				- 1	
					callerPho	oneNumber				
					Connecti	onID				
					Contaction Contaction	d rSegment			*	
									Done	

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**.

Date Range	Yesterday	Agents & Workgro	oups			Comments
Yesterday	*	Include 🗸	Agents	~	+	
		Include 🗸	Partitions	~	+	Users
Include V Tags	~				_	🗌 Good 🗌 Neutral 🗌 Bad
		Include v	Connec 🗸	Values ^	+ "	Jser Actions
			[Equals V	00b403	530ed1996b
					3	segments
						Mare then

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.

						•	Ę.	0
						\$	/	1
Agents & Workgroups		Comments	Interaction Properties					^
Include 👻 Agents 👻 🕂	+		Types:	Types			*	
Include V Partitions V 4	+	Users 🗸	Duration:	More than			~	
	_	Good Neutral Bad	Time	Se	cs			
Metadata		Hear Antione						
Include v Name v Values v 4	+	User Actions	Interaction ID:					
		Interaction Reviewed By: Users ~	External ID:					
		Segments						
		More than^						
		More than						
		Less than						
		Between	Reset	Save as	s	earch		

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.

			F .	0
			- 🏦 🖊	:
	Interaction Properties			
	Types:	Types	~	
~	Duration:	More than	^	1
	Time	More than		i I
	Interaction ID:	Less than		Ш
Users 🗸	External ID:	Between		1
~				
Segments				
	Rese	et Save as	Search	- 1
	✓ Users ✓ Segments	Interaction Properties Types: Duration: Time Interaction ID: Segments Resu	Interaction Properties Types: Types: Duration: More than Interaction ID: Between External ID: Segments Reset Save as	Interaction Properties Types: Types Duration: More than Time More than Less than Less than Interaction ID: Between Segments External ID:

7.2.2.2 Sorting Results and Listening to Calls

- 1. Sorting Results
- 2. Adjusting Search Criteria
- 3. <u>Listening to Calls</u>

(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.

	÷ /
External ID	callType
01M8LBI688A3F92O4C17O2LAES009N1L	Outbound
01M8LBI688A3F9204C1702LAES009N1L_2023-05-16_23-59-44	
01M8LBI688A3F92O4C17O2LAES009N1K	Outbound
01M8L8I688A3F920401702LAE0009N1J	Outbound
01M8LBI688A3F92O4C17O2LAES009N1H	Outbound
01M8LBI688A3F92O4C17O2LAES009N1G	Outbound
01M8LBI688A3F92O4C17O2LAES009N1C	Outbound
01M8LBI688A3F92O4C17O2LAES009N1D	Outbound
01M8LBI688A3F9204C1702LAES009N1A	Outbound

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

	 0
	÷ /
External ID \$	callType
01M8LBI688A3F9204C1702LAES009N1L	Outbound
01M8LBI688A3F9204C1702LAES009N1L_2023-05-16_23-59-44	
01M8LBI688A3F9204C1702LAES009N1K	Outbound
01M8LBI688A3F9204C1702LAES009N1J	Outbound
01M8LBI688A3F9204C1702LAES009N1H	Outbound
01M8LBI688A3F9204C1702LAES009N1G	Outbound
01M8LBI688A3F9204C1702LAES009N1C	Outbound
01M8LBI688A3F92O4C17O2LAES009N1D	Outbound
01M8LBI688A3F9204C1702LAES009N1A	Outbound

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

		 /		:
External ID	Workgroup	^		
01M8LBI688A3F9204C1702LAES009N1L	✓ Tags ✓ Duration	4		^
01M8I BI68843E920401702I AES009N1L 2023-05-16 23-50	Text			
	Interaction ID External ID			
01M8LBI688A3F9204C1702LAES009N1K	agentExtensionDN			
01M8LBI688A3F9204C1702LAES009N1J	agentId	-		
01M8LBI688A3F9204C1702LAES009N1H	callerPhoneNumber			
01M8LBI688A3F9204C1702LAES009N1G	✓ callType ☐ ConnectionID			
01M8LBI688A3F9204C1702LAES009N1C	CustomerSegment			
01M8LBI688A3F9204C1702LAES009N1D				
01M8LBI688A3F9204C1702LAES009N1A	GSYS_IVR			-
	ivr_language	-	►	

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

Interactions (1,000 of	11,818)	~	Filters: Date Ra	inge			
Date / Time	0	Media	Agent	÷	Workgroup	Tags	÷
05/16/23 06:59 PM		•		J	Milwaukee		
05/16/23 06:59 PM		e.			Milwaukee		
05/16/23 06:59 PM		ور			Milwaukee		

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.

			7	9
		*	1	:
\$	callType			
	outbound			
5-16_23-59-44				
	Outbound			

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.

Interaction	ns (1,000 o	f 11,818) 🗸 🗸	Filters: Date R	ange
#		Date / Time	¢	Media
1	- 🗆	05/16/23 06:59	PM	e.
Ð	100	05/16/23 06:59	РМ	¢.
2	- +	05/16/23 06:59	PM	e.
3	- +	05/16/23 06:58	PM	e.
4	- +	05/16/23 06:58	PM	e

7.2.2.3 Saving Searches

- 1. Saving a Search
- 2. <u>Viewing Saved Searches</u>
- 3. Running Saved Searches
- 4. Editing Saved Searches
- 5. Deleting a Saved Search

(Video instructions available: <u>Saving Searches</u>)

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.

	Interaction ID:		1.
Users 👻	External ID:		
Ý			
Segments			
	Reset	Save as	Search
	Jsers v Segments	Interaction ID: Jsers External ID: Segments Reset	Interaction ID: Jsers External ID: Segments Reset Save as

Enter a name for the search and select OK.

Quality Tools						
Lingen definitie	Enter se	earch name				
				ОК	Cancel	
ř H						

Viewing Saved Searches

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

ဝိ Speec	hMiner	Dashboard	Explore	Reports	Quality	Tools
L			Search			
			Saved S	earches		
			Interacti	on Lists		
					8	
_						
		m				

Running Saved Searches

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

Ū	ξ s	peechMin	er Dashl	board	Explore	Reports	Quality	Tools			
,	lew 9	Search	s	Saved Searches Interaction Lists							
S	Sav	ed Se	earche	es (2)							
		Run	Delete	Name	e ≑			Creator			
1		0	Ô	Test				woltemj			
2		0	â	Save	d Search 1			woltemj			
								14			

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.

				74	9
			-	/	:
	$\stackrel{\triangle}{\nabla}$	callType			
		Outbound			
5-16_23-59-44					
		Outbound			

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

More than Segments	egments			
Segments	More than	~		
	ļ.	Seaments		

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

Select Search.			
SpeechMiner Dashboard Explore Reports Quality To			Action Items (0) ?
	No Inter	raction	
2			
Interactions () 🗸			÷ /
Date Range All	Agents & Workgroups	Comments	Interaction Properties
	Include Y Agents Y +		Types: Ypes Y
Tags	Include Y Partitions Y +	Users Y	Duration: More than Y
Include 🖌 Tags 👻	Metadata	Good Neutral Bad	Time Secs
	Include ¥ Name ¥ Values ¥ +	User Actions	Interaction ID:
		Interaction Reviewed By: Users Y	External ID:
		Segments	
		More than Y	
		# Segments	
			Reset Save as 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.

Interac	tions (1,000 c	of 1,509,738) 🗸 🖌 Filters: D	ate Range								4
8		Date / Time	¢ Media	Agent	4	Workgroup	Tags	0 Duration 0	Interaction ID 0	External ID	 1 of 100
8	Li +	06/09/22 09:14 AM	c					01:29			3 Export
9	- +	06/09/22 09:14 AM	c					01:27			Add To Delete
10	• +	06/09/22 09:14 AM	c					00:59			Permali
11	D +	06/09/22 09-14 AM	· ·					02-14			
12	□ +	06/09/22 09:12 AM	c					00:08			
13 1	⊮ +	06/09/22 09:12 AM	c					00:07			
	-										

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

Export	×				
Export selected interactions					
Include audio and	I text interaction files				
Cancel	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 de	partn	nen [.]	ŧ.		
5			+	12/19/	22 02:14 P
6			+	12/19/	22 01:44 P
-					
٩		12_2	0_22	zip 🔨	
	РŢ	ype he	ere to	search	

Income Maintenance (IM) workers looking for instructions to upload the recording to the ECF see <u>Process</u> 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

<u>8.1.6.1 Adding a Supervisor to a Static Agent Group</u> (Video instructions available: Adding a Supervisor to a Static Agent Group)

<u>8.1.6.2 Removing a Supervisor from a Static Agent Group</u> (Video instructions available: <u>Removing a</u> <u>Supervisor from a Static Agent Group</u>)

-<u>8.1.7 Quick Agent Search in Platform Administration</u> (Video instructions available: <u>Quick Agent Search in</u> <u>Platform Administration</u>)

<u>8.1.8 Editing General Agent Information</u> (Video instructions available: <u>Editing General Agent Information</u>) 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.

Agent Desktop	Platform Administration	Designer	Historical Reporting	Real-Time Reporting	
Workforce Management	Callback Administration				

Username		
Password		
1	Log In	

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

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4. Select the DHS folder.

		uusuduuu				
0 000 000	-guidaon - Aon	motion				
Home > Agent Groups	> Agent Groups >	OpsStageIU				
🗌 Select 🥒 Edit 🕻	🕽 New 📋 Delete	More	G Show Quick Filter	Directory	OpsStagelU (Agent Group Fold	ler)
L Name						
DHS						
 -Select the DMS f	older or the	consortiu	m folder the ag	ent is in (C	apital, Northern, Milwau	ukee, etc.),
and then select t	heir name to	open the	eir profile.			
All other lines of	business no	t related t	o Income Main	tenance ai	e in the DMS folder.	
- 1						
- 1						
0 1						
□ 1						
• •						
Select Skills on the	he left-hand- :he skill you' i	list. Once re looking	selected, there for, see <u>Sectio</u>	is a list of n 8.1.3 Add	the agent's skills. ling a Skill for an Agent.	
Select Skills on the set of the s	he left-hand the skill you'i iguration Adm	list. Once re looking	selected, there for, see <u>Sectio</u> l	is a list of n 8.1.3 Add	the agent's skills. ling a Skill for an Agent.	
Select Skills on the select Sk	he left-hand the skill you'n iguration Adm rsons > OpsStaget	list. Once re looking inistration U > DHS Traini	selected, there for, see <u>Section</u> ing > Propertie	is a list of n 8.1.3 Add	the agent's skills. ling a Skill for an Agent.	
Select Skills on the select Skills on the select Skills on the select Skills on the select of the se	the skill you'l the skill you'l figuration Adm risons > OpsStagel	list. Once re looking inistration U > DHS Traini	selected, there for, see <u>Section</u> ing > Propertie	is a list of n 8.1.3 Add	the agent's skills. ling a Skill for an Agent .	
Select Skills on the select Skills on the select Skills on the select Skills on the select of the se	he left-hand the skill you'r iguration Adm trsons > OpsStagel Skills	list. Once re looking inistration IU > DHS Traini	selected, there for, see <u>Section</u> ng > Propertie	is a list of n 8.1.3 Add	the agent's skills. ling a Skill for an Agent.	
Select Skills on the second se	he left-hand- the skill you'l iguration Adm rsons > OpsStagel Skills	list. Once re looking inistration U > DHS Traini	selected, there for, see <u>Section</u> ing > Propertie	is a list of n 8.1.3 Add	the agent's skills. ling a Skill for an Agent.	
Select Skills on the select Skills on the select Skills on the select Skills on the select of the se	he left-hand the skill you'n iguration Adm rsons > OpsStaget Skills	list. Once re looking inistration IU > DHS Traini	selected, there for, see <u>Section</u> ng > Propertie	is a list of n 8.1.3 Add	the agent's skills. ling a Skill for an Agent. Level	
Select Skills on the second se	he left-hand- the skill you'l fguration Adm ersons > OpsStagel	list. Once re looking inistration U > DHS Traini Skill	selected, there for, see <u>Section</u> ing > Propertie	is a list of n 8.1.3 Add	the agent's skills. ling a Skill for an Agent. Level 10	
Select Skills on the select Skills on the select Skills on the select Skills on the select of the se	he left-hand the skill you'n iguration Adm rsons > OpsStaget	list. Once re looking inistration IU > DHS Traini	selected, there for, see <u>Section</u> ing > Propertie	is a list of n 8.1.3 Add	the agent's skills. ling a Skill for an Agent. Level 10 10	
Select Skills on the second se	he left-hand- the skill you'l fguration Adm proofs > OpsStagel Skills	list. Once re looking inistration U > DHS Traini	selected, there for, see <u>Section</u> ing > Propertie	is a list of n 8.1.3 Add	the agent's skills. ling a Skill for an Agent. Level 10 10 10	
Select Skills on the select Skills on the select Skills on the select Skills on the select of the se	he left-hand- the skill you'n iguration Adm proons > OpsStagel	list. Once re looking inistration U > DHS Traini Skill	selected, there for, see <u>Section</u> ing > Propertie	is a list of n 8.1.3 Add s	the agent's skills. ling a Skill for an Agent. Level 10 10	
Select Skills on the select Skills on the select Skills on the select Skills on the select of the se	he left-hand- the skill you's iguration Adm rsons > OpsStagel	list. Once re looking inistration U > DHS Traini Skill	selected, there for, see <u>Section</u> ing > Propertie	is a list of n 8.1.3 Add s	the agent's skills. ling a Skill for an Agent. Level 10 10	
Select Skills on the select Skills on the select Skills on the select of	he left-hand- the skill you'r iguration Adm ersons > OpsStagel	list. Once re looking inistration U > DHS Traini Skill	selected, there for, see <u>Section</u> ing > Propertie	is a list of n 8.1.3 Add *	the agent's skills. ling a Skill for an Agent. lo 10 10	
Select Skills on the select Skills on the select Skills on the select se	he left-hand- the skill you' iguration Adm rsons > OpsStagel	list. Once re looking inistration U > DHS Traini Skill	selected, there for, see <u>Section</u> ing > Propertie	is a list of n 8.1.3 Add s	the agent's skills. ling a Skill for an Agent. Level 10 10 10	

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- 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.

N/.	No items
New	×
Skill*	
Level	
10	
	Cancel OK

11. Click Apply.

General	Skills				Add	Remove	: M
Member Of							S.
Ranks		Skill	Ş	Level			
Skills				10			
Agent Logins							
Options							
Permissions							
Dependencies							
Accessible Objects							

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.

NoteTo conduct a quick search for an agent, see Section 8.1.7 Quick Agent Search in PlatformAdministration, then proceed with step number five.

		0	0
Accounts	Routing / Digital	Environment	Switching
Access Groups	Business Attributes	Scripts	Agent Logins
Agent Groups	Business Attribute Values		DNs
Capacity Rules	Transactions		DN Groups

3. Select the OpsStageIU folder.

🗸 🔍 Show Column Filter
0 Skils 0 Agent

4.—Select the DHS folder.

Home > Agent Groups > Agent Groups > OpsStagelU Select Edit Name Delete Note: All other lines of business not related to Income Maintenance are in the DMS folder.	*
Select Edit New Delete More Name DHS DHS DHS Here DHS DHS <th>~</th>	~
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 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. 	
 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. 	
 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. 	
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.	
Note: All other lines of business not related to Income Maintenance are in the DMS folder.	
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6.	
7.—Select Skills on the left-hand list. Once selected, there is a list of the agent's skills.	
GAX Configuration Administration	
Home > Persons > Persons > OpsStagelU > DHS Training > Properties	
Course 1	
Skills	
Member Of	
Ranks Skill & Level	
Skills 10	
10	
Options	
Permissions	
Dependencies	
Accessible Objects	

8. Click Add.

+ Persons + Person	e + OpsStagel	U + DHS + Capital + Per	operties					E Celete Person	Move Move
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nka		Skill	\$	Level					1
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9. Select the folder icon.

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	_				

10. Select the agent's folder.

Skill Directory		× 10 Clone
Select Skill		
54		1 <u>P</u>
N =	Q. Quick Filter	0
Name		
✓ ♥ Environment		
🗸 🖿 Skills		
✓ ■ OpsStageIU		
Bay_Lake		
Capital		
DMS		
East_Central		
Great_Rivers		
M_Central		
Milwaukee		

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

<u> </u>					No ite	ems
New						×
Skill*						
Level						
10						
					Cancel	ОК
3 Click Apply.						
3. Click Apply. ë GAX Configuratic	n Administrati	on				
3. Click Apply. Same a configuration Home > Persons > Persons	n Administrati > OpsStagelU > DH	on IS Training > Proper	ties			🗃 Delete Person 🕒 Clone 🖿 Move
3. Click Apply. G GAX Configuratic Home > Persons > Persons General	n Administrati > OpsStagelU > DH Skills	on IS Training > Proper	ties			🗑 Delete Person 📭 Clone 🖿 Move
3. Click Apply. GAX Configuration Home > Persons > Persons General Member Of	n Administrati > OpsStagelU > DH Skills	on IS Training > Proper	ties -	Level		🖥 Delete Person 😰 Clone 🖿 Move Add Remove <u>i</u> Ma
3. Click Apply. C GAX Configuratic Home > Persons > Persons Ceneral Member Of Ranks etam.	n Administrati > OpsStageIU > DH Skills Skills	on IS Training > Proper	ties ¢	Level		🗑 Delete Person 🗈 Clone 🖿 Move Add Remove 👯 Mar
3. Click Apply. GAX Configuration Home > Persons > Persons General Member Of Ranks Skills denet Lesien	n Administrati > OpsStageIU > DH Skills 	on IS Training > Proper	ties \$	Level 10		Delete Person La Clone Move Add Remove i Ma
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3. Click Apply. GAX Configuration Home > Persons > Persons General Member Of Ranks Skills Agent Logins Options Permissions Dependencies Assertible Objects	n Administrativ	on IS Training > Proper	ties \$	Level 10		Delete Person La Clone Move

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8.1.4 Adding a Skill for Multiple Agents

(Video instructions available: <u>Adding a Skill for Multiple Agents</u>) 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.

GAX Configuration Administration

Configuration Manager



2. Select the OpsStageIU folder.

ъ,	GAX	Configuration	Administration						
Home :	Person	ns > Persons (1)							
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	Use	emane	\$	First Name		Last Name	0	Skills	\$ Apent
		OpeStageRU							

3. -	Select	the DHS folder	÷						
	00	GAX Configurati	on Administra	ition					
	Home	> Agent Groups > Age	ent Groups > OpsS	itagelU					
	🗌 Sel	lect 🥒 Edit 🔂 New	🖞 🛅 Delete 🚦 I	More 🛛 🔍 Show Quick	Filter Dire	opsStage	IU (Agent Group	Folder)	~
		Name							
		DHS							
		•							
4	Select	the DMS folde	r or the cons	sortium folder th	e agents a	are in (Capital, N	orthern, N	lilwaukee, etc .)
	and the	en select the c	heckboxes n	ext to their name	es.				
Note:	All oth	ner lines of busi	iness not rel	ated to Income N	Maintenar	nce are in the DI	AS folder.		
	്	GAX Configuration	Administration						
	0	GAX Configuration	Annunensee						
	Home >	Persons > Persons > 0	psStagelU > DHS Tra	aining (24), Selected (3)					
	Select	et / Edit O New	Delete : More	Q Show Quick Filter	Directory	DHS Training (Person	Folder)	🗸 🍳 Show Co	lumn Filter
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6.—Select More.

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7. Select Edit Skills.

normal is	Persons + Persons + OpsistageU	s (Hits +, Selected (3)					
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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).

		Q, 0	uick Filter or Crea	te Skill
•	Skill Name	٥	Rating	\$
			10	

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.

	Ð	0	0
Accounts	Routing / Digital	Environment	Switching
Access Groups Agent Groups	Business Attributes Business Attribute Values	Scripts	Agent Logins DNs
Persons Roles Skille	Transactions		Places

2.—Select the OpsStageIU folder.

00	GAX Configuration Administration		
Home >	Agent Groups > Agent Groups		
Selec	t 🥒 Edit 🗿 New 👸 Delete 🚦 More 🛛 Q, Show Quick Filter	Directory Agent Groups (Agent Group Folder)	~
	tune		
	CpsStagelU		

3.—Select the DHS folder.

og g	AX Configuration Administration	
Home > A	Agent Groups > Agent Groups > OpsStagelU	
Select	P Edit C New 📋 Delete : More C Show Quick Filter Directory OpsStageIU (Agent Group Folder)	~
	Name	
	DHS	

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.

g a	AX Configuration Administration	
Home > A	Agent Groups > Agent Groups > OpsStagelU > DHS > Capital	
□ Select	P Ealt O New Delete : More & Snow Quick Filter Directory Capital (Agent Group Folder)	
	Name	
	Dynamic Agent Groups	
	Static Agent Groups	
	A Capital	

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

General Supervisors	Agents	(74)										,	dd Parter	- 1
	0	Name		First Name \$	Last Name		skills							
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Origination DNs														
Options		1												
Permissions	0	1												
Dependencies		1												
1920		1												
		1												
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GAX Configur GAX Configur Inte + Agent Droges + A Deseral	etion Adm Agent Groups +	OpsStageRU + DHS +	Capital + Sta	itis: Agent Groups >				-			🖀 Delete Agen	il Group	E Close	b -
GAX Configer Inte + Agent Brough + A Centeral Supervisions	ation Adm Igent Oroups + Agents	opertugenti > DHS + (74)	Capital > Sta	rtec Agent Groupe >							🖀 Delete Agen	il Group	(Close M Person	
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Note: Only one agent can be added to an agent group at a time.

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select-Remove.

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-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. GAX Configuration **Configuration Manager Routing / Digital** Accounts Environment Switching Access Groups **Business Attributes** Scripts Agent Logins Agent Groups **Business Attribute Values** DNs Tansactions Persons Places Roles Skills Select the OpsStageIU folder. 2. GAX Configuration Administration Home > Agent Groups > Agent Groups Select / Edit O New To Delete : More Q Show Quick Filter Directory Agent Groups (Agent Group Folder) ~ DpsStagelU

3.—Select the DHS folder.

Q	n G	AX Configuration	Administratio	n				
	Home > A	Agent Groups > Agent	Groups > OpsStag	gelU				
I	Select	🖋 Edit 🚯 New	🗊 Delete : Mo	ore 🛛 🔍 Show Quid	k Filter	Directory	OpsStageIU (Agent Group Folder)	~
-		Name						
		DHS						
		•						
4. <u>Se</u>	ect th	e Consortium/	<mark>Line of Busi</mark>	ness (LOB) fok	der.			
0	3 G/	AX Configuration	Administration	1				
1	Home > A	Agent Groups > Agent (Groups > OpsStage	elU > DHS	i i			
	Select	🖉 Edit 😯 New 🔋	Delete : Mor	e 🍦 🔍 Show Quick	Filter	Directory	DHS (Agent Group Folder)	~
		Name						
		🖿 Bay Lake						
		🖿 Capital						
		DMS						
		East Central						
_	8	Great Rivers						
		IM Central						
		Milwaukee						
		Moraine Lakes						
		Northern						
		Southern						
		Tribal						
		Western						
		WKRP						

5.	-Select t	the Static Agent Groups folder.
	°°	GAX Configuration Administration
	Home >	Agent Groups > Agent Groups > OpsStageIU > DHS > Capital
	Selec	et 🖉 Edit 🛇 New 📋 Delete 🗄 More 🛛 Q. Show Quick Filter Directory Capital (Agent Group Folder) 🗸
		Name
		Dynamic Agent Groups
		Static Agent Groups
		월 Capital
6.	Select 1	the umbrella group. The umbrella agent group should include all agents in the consortium or inc. of Rusiness (LOR).
	° (GAX Configuration Administration
	0	
	Home >	Agent Groups > Agent Groups > OpsStageIU > DHS > Bay Lake > Static Agent Groups (16)
	Selec	t 🖉 Edit 🚱 New 💼 Delete 🗄 More 🛛 🔍 Show Quick Filter Directory Static Agent Groups (Agent Group Folder) 🗸
		Name
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		X Bay_Lake_Brown
		Say_Lake_Door
		Bay_Lake_Marinette
		2 Bay_Lake_Oconto
		Say_Lake_Shawano
		Se BayLake_Aux_AG
7	-Select I	the Supervisors tab on the left, and then click Add on the right.
	G GAX	Configuration Administration ?
	Home > Agent Gr	oups > Agent Groups > OpsStagetU > DHS > Bay Lake > Static Agent Groups > Bay_Lake Properties
	General Supervisors	Supervisors (29)
	L	🗋 Name 💠 First Name 🗘 Last Name 🗘 Agent 🗘

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-Scroll through the list to find the consortium you want to consortium's folder.	add the supervisor to, and select that	
Supervisor		
Select Supervisor		
Folder : Bay_Lake		
<u></u> ≡	Q Quick Filter	e
Name		
 Environment 		
✓ Persons		
✓ ■ OpsStageIU		
Aarons Test Account		
CCE		
✓ DHS		
Bay_Lake		
Disabled Agents		
🗸 🖿 Capital		
Disabled Agents		
		Cancel

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

Supervisor

Select Supervisor

Folder : Bay_Lake

5 ≡				Q,	Quick Filter	+	С
Name	⇔	First Name	Last Name	♦ A	gent		₽
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<u>•</u>				~	/		
<u>•</u>					1		
<u>*</u>					*		

Cancel

×

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

meral	_	_					_	
pervisors	Superv	visors (30)				Ad	i Remove	Mo
gents		Name	\$ First Name	Last Name	Agent			4
igination DNs		<u>#</u>			~			
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rmissions		1			~			
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8.1.6.2 Removing a Supervisor from a Static Agent Group

(Video instructions available: <u>Removing a Supervisor from a Static Agent Group</u>)

To remove a supervisor from a static agent group:

- 1. Follow instructions one through six found in <u>Section 8.1.6.1 Adding a Supervisor to a Static Agent</u> <u>Group</u>.
- 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.

GAX Configurati	on Adm	mistration						
lome > Agent Groups > Ag	ent Groups >	OpsStagelU >				🛅 Delete Agent Group	Clone 2	1
General								
Supervisors	Superv	isors (11), Selected(1)					Add Remove	
Agents		Name	\$ First Name	Last Name	\$ Agent			
Origination DNs		1	-		4			
Ontions		1			*			
Deminsions		2			*			
Permissions		2			*			
Dependencies								

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

	_								
nervisors	Superv	risors (10)					Add	Remove	: Me
ents		Name	\$ First Name	Last Name	Agent				
inination DNs		1			~				
gination ons		1			~				
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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	lick Search.				
	GAX Configuration Adm	inistration			
	Configuration Mar	nager			Q Search 🌍 Environ
	E	G	0	0	
	Accounts	Routing / Digital	Environment	Switching	
-	Access Groups	Business Attributes	Scripts	Agent Logins	
	Agent Groups	Business Attribute Values		DNs DN Groupe	
	Persons	Transactions		Places	
	Roles			11000	
	Skills				

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

Home > Search										
Name / Number	Туре •		State			Tenant				
Name / Number	Person		~		~		~	Case Sensitive	Clear	٩
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Search Results										
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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.

NoteTo conduct a quick search of an agent, see Section 8.1.7 Quick Agent Search in PlatformAdministration, then proceed with step number five.

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	Accounts	Routing / Digital	Environment	Switching	
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ſ		Southern						
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5. Select the agent entry to be edited.

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GAX

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	Disabled Agents						
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	2					BayLake_Hmg_SK (0), BayLake_Trans_SK (0), BayLake_EBD_LTC_SK (0), BayLake_G	~
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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 <u>Section 2.3 Forgotten</u> <u>Credentials.</u>

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.

GAX Configura	tion Administration						
Home > Persons > Persons	s > OpsStagelU > DHS > Bay_Lake >	Properties			i Delete	Person 🖆 Cl	one 🖿 Move To
General Member Of	Username *						
Ranks	🗹 Agent						
Skills	First Name	Last Name					
Agent Logins							
Options	E-mail Address	Employee ID *					
Permissions							
Dependencies	Password	Confirm Password	_				
Accessible Objects				Anytime a password is reset for an agent			
Processing objects	Force Password Reset on Next Login	-	_	the Admin must check the box, "Force Password Reset on Next Login."			
				·			
	Default Place	Capacity Rule	-				
	Cost Contract	Site					
	Tenant	State Enabled					
	Environment						
	Cancel					Apply	Save
						-	_

7. After making desired changes, click Apply.

8.2 Business Controls

<u>8.2.1 Logging in for Business Controls</u> (Video instructions available: <u>Logging in for Business Controls</u>) <u>8.2.2 Emergency Flags</u> (Video instructions available: <u>Emergency Flags</u>) 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.

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- 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.



Tenant

sowi.mgep.info

Username *

and the second s	
Remember me	

Next

4.-Select Next.

5	Complete the Username	and Password field	he with your WAM	S log_in information
5.	complete the osername		as with your write	
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WISCONSIN DEP. of HEALTH SERV	ARTMENT ICES
Secure Logon	
Username	
Password	
Logon	

Do not change anything on this page.	
<mark>ទ</mark> ំGENESYS [®]	
Welcome	
Continue	
Change login account	
<u>Change login account</u>	

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

9.1 Real-time Reporting Overview 9.2 Historical 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

<u>9.1.1 Logging in to Access Real Time Reporting (Video instructions available: Logging in to Access Real Time</u> <u>Reporting</u>)

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.

		Widget
gent Login		
Name	Login Time	q
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	00:00:00	
	00:00:00	

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.

CYCL	15th	l≡d l	5	Ų
	Platform Administration	 Historical Reporting	Real-Time Reporting	Interaction Recording

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

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GENESYS Workspace
Tenant
sowi.mgep.info
Username *
Remember me
Next

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

WISCONSIN DEPARTMEN	т
Secure Logon for DHS-GENESYS	
Username Password	
Logon	

- 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.

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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:

- 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)
- 9.2.2 Creating Subscriptions (Video instructions available: Creating Subscriptions)
- 9.2.2.1 Email Subscription
- 9.2.2.2 History List Subscription
- 9.2.3 Editing Subscriptions (Video instructions available: Editing Subscriptions)
- 9.2.4 Unsubscribing from Subscriptions (Video instructions available: Unsubscribing from Subscriptions)
- 9.2.5 Recommended Queue and Agent Reports
- 9.2.5.1 Agent Performance Report V2.0
- 9.2.5.2 Queue Statistics_Adjusted
- 9.2.5.3 Queue Statistics Adjusted CB
- 9.2.5.4 Queue Voicemail Counts

9.2.1 Running Reports

(Video instructions available: Running Reports)

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

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

WISCONSIN DEPARIMENT of Health Services	Welcome to your Wis	consin Department of He	alth Services MGEP Porta	al	
) A					Q
Agent Desktop	Administration	Designer	Historical Reporting	Real-Time Reporting	Interaction Recording
Workforce Management	Callback				

WISCONSIN I of HEALTH SE	DEPARTMENT ERVICES
Secure Logon for DHS-GENESYS GCXI	
Username	
Password	
Logon	

3. Select CX Insights.





CX Insights for iWD

CX Insights for iWD project enables business users to quickly gain insights into the business outcomes and operational performance of work items. Industry-leading analytics designed to serve up the metrics and attributes that reside within iWD. **Server name** mstr-01/MSTR-02

4.—Warning message displays, select continue.

Warning

This is a notification that your MicroStrategy implementation may be out of compliance with your software license agreement. The number of named users licensed for at least one product has been exceeded. The privileges associated with out of compliance products cannot be added to users, user groups, or security roles.

Continue

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

°° ← → CX Insights	> Home					
Create Creats Recents Shared Reports My Reports History List	9.019.00 Browse	My Reports	History List	My Subscriptions		
My Subscriptions	Analyze					
			m			
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	Develop					
			_			_
			T +	? ,	ΞĻ	E,
	Create Report	Create Document	Create Filter	Create Prompt	Create Metric	Create Custom Group

6.—Select the Custom folder. 00° ÷ CX Insights > Shared Reports Custom **CX Insights** Create Owner: Administrator Modified: 12/15/22 2:11:06 PM Owner: Administrator Modified: 10/6/21 4:56:00 PM This folder contains the CX Insights historical reports. Recents ▶ 🛄 Shared Reports Aggregator Schema Version Aggregator Status Report Owner: Administrator Modified: 5/6/21 7:48:29 PM GIM and aggregator schema version. Owner: Administrator Modified: 5/6/21 7:48:29 PM Aggregator status report. My Reports ▶ 📷 My Objects History List CX Insights Schema Version Owner: Administrator Modified: 5/6/21.748:29 PM The schema version of Genesys CX Insights. **CX Insights Server Feature** My Subscriptions Owner: Administrator Modified: 5/6/21 7:48:29 PM All available features in Genesys CX Insights. GCXI Service Report GUXI SerVICE HepOrt Owner: Administrator Modified: 5/6/21 7.48:29 PM FFSQL report to check the availability of ODBC metadata database connection.

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

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Shared Reports Sourcem Dev Reports			WIEBS Owner, Top Premyer Holdfield 11/28/22 4 MU13 PM		Agent Performance Report Owner: James Bañley Hooffiel 10/25/22.6-07.55 FM
 MIES MIEBS CX Insights 			Agent Performance Report - 10-25 Owner: Jame Bohley Holdfield 10/25/24 6/3/39 PM		Agent Performance Report - Dev Owner, James Rubby Hoddfied 12/7224-45320 BM
My Reports My Objects History List My Subscriptions			Custom Queue Statistics The second statistics MINIT 23528 AM Introduced and part of the second statistics of interactions in each queue were accepted within the defined MINIT 23528 AM Introduced a configured queues. It individual club parcentage of interactions in each queue were accepted within the defined and accepted and accepted the performance of each queue in handling interactions.		Interaction Handling Attempt Report - LastVQ Mean June Theory And Attempt Report - LastVQ 2022 12:02:14 HI 12:0221 20:02:14 HI 12:0221 40:0201 40:0201 4
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			Holdfald: 21/122 44/03 PM The report is adjusted premoving Short Abandoned (*<120) from Calls Entered. Abandoned, and Answer Rate and Statistical Abandoned Abandoned (*<120) from Calls Entered. Abandoned, and Answer Rate		HoldBards (22)22 304-24 PM This report is adjusted by removing Short Abandoned (~<120s) from Calls Entered. Abandoned, and Answer Rate. Includes 30 minute intervals
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			Survey Answer Report - Agent Group Common as Babley (19/22 23):23:24 Use the month law reader have calculated sense particular including the number and percentage of times that each answer reas weeklish. If we set have the dependent by application, agent group, quantities to revenue.		Survey Answer Report - Application Owner, Jones Finite (2012) 2012 The Company of the Company Lake Iso provide the Company of the Company of the Company of the Company of the Company of the Company of the Company of the Company of the Company of
		?	Week Owner: James Bahley Houtlined 11/7/22 755125 FM		

1. Pre-set Date Filter	
This prompt allows only one selection. Search for: Available: Today Available: Today Selected: Today Selected: Selec	
2. Start Date	
3. End Date	
4. Queue Group	
Search for:	

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.

Tho	Oupup Statistics	Adjusted report	works host if run	as a DDE or excel
THE	Queue Statistics	<u></u>	Works best in run i	as a r br or exect.
•				

°° ← → CX Insights >			ueue Statistics_Adju	sted												
REPORT HOME - TOOLS - DATA	- GRID	FORMAT +														Last update: 12/23/22 5:34:14 PM
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REPORT OBJECTS ? ×	REPORT DET	TAILS														? X
Day Diteraction Type Media Type Oueue	Report Filter: (ApplyComparis Gen_VQ	Agost Fair: Table - Computing = 0 BETVEEN (GELCT RANCE, START KEY FROM RELITIVE RANCE WHEE RANCE, JUME = #61 // (Clark Date Time Key). (Clark Date Time Key). Gen_VO														
Tenant Abandoned Invition	PROMPT DET	XOMPT DETAILS *														
Abandoned Watting Accepted Agent Br Acil Abandoned Br Acil Abandoned	Prompt 1: P Last Month Prompt 2: S Prompt not Prompt 3: E Prompt 3: E Prompt 3: C Prompt 3: C Prompt 3: I Prompt 3: C Prompt 4: C Prompt 4	Pre-set Date Filter Start Date answered ind Date answered Queue Group answered Media Type interaction Type Fenant answered Queue _VQ,		VQ. Est	p_VQ,E	isp_VQ,	.VQ.	Trans_VQ,	_VQ							
Cleared Entered Hold Time	H 4 1 2 3 of	3 pages 🕨 🕅													Data rows: 1 - 5	0 of 129 Data columns: 11
A Max Accept Time (Fmt)	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)
Routed Other					2022-11-01	105	92	12	1	2	87.6%	00:06:09	00:09:49	0:00:20	00:10:17	00:37:28
Short Abandoned Waiting					2022-11-02	117	95	20	2	0	81.2%	00:05:42	00:07:19	0:00:29	00:07:55	00:28:14
					2022-11-03	100	86	12	2	3	86.0%	00:07:09	00:08:39	0:00:06	00:08:53	00:35:45
					2022-11-04	82	71	11	0	1	86.6%	00:05:45	00:07:32	0:00:44	00:08:22	00:22:16
					2022-11-07	122	119	2	1	4	97.5%	00:02:05	00:07:57	0:00:41	00:08:44	00:16:54
					2022-11-08	117	101	15	1	4	86.3%	00:03:41	00:08:14	0:00:20	00:08:41	00:19:54
					2022-11-09	102	94	6	2	1	92.2%	00:02:58	00:08:03	0:00:24	00:08:33	00:23:41
					2022-11-10	105	99	4	2	1	94.3%	00:01:56	00:07:30	0:00:40	00:08:15	00:17:11
27 items found					2022-11-11	55	54	0	1	5	98.2%	00:00:47	00:10:44	0:01:01	00:11:51	00:06:35
			110	labourd	2022-11-14	114	109	3	2	4	95.6%	00:01:25	00:06:46	0:00:32	00:07:27	00:09:46
			_vq	THE OWNER OF THE OWNER	2022-11-15	99	89	5	5	0	89.9%	00:02:16	00:08:02	0:00:17	00:08:28	00:13:35
					2022-11-16	122	109	12	1	1	89.3%	00:04:31	00:08:33	0:00:26	00:09:07	00:41:30
NOTES					2022-11-17	116	105	9	2	2	90.5%	00:06:33	00:12:15	0:00:25	00:12:48	00:38:39
C RELATED REPORTS	H 4 1 2 3 of	3 pages 🕨 🕷					~~		<u>^</u>		AF 74-	** ** **		0.00.00	00 00 F0	00 40 00

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.

S 🗲 \Rightarrow CX Insigh	its > Home					
•	9.0.019.00					
Create Recents Shared Reports My Reports History List	Browse	L My Reports	History List	My Subscriptions		
My Subscriptions	Analyze					
	<		m			
	Create Dossier	Add External Data	Upload MicroStrategy File			
	Develop					
			T.	?.	Ξì,	E,
	Create Report	Create Document	Create Filter	Create Prompt	Create Metric	Create Custom Group

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

o° ← → CX Insigh	nts > Shared Reports		
Create © Recents		Custom Owner: Administrator Modified: 12/15/22 2:11:06 PM	CX Insights Owner: Administrator Modified: 10/6/21 4:56:00 PM This folder contains the CX Insights historical reports.
Shared Reports My Reports My Reports My Objects		Aggregator Schema Version Owner: Administrator Modified: 5/6/21 7:48:29 PM GIM and aggregator schema version.	Aggregator Status Report Owner: Administrator Modified: 5/6/21 7:48:29 PM Aggregator status report.
History List		CX Insights Schema Version Owner: Administrator Modified: 5/6/21 7:48:29 PM The schema version of Genesys CX Insights.	CX Insights Server Feature Owner: Administrator Modified: 5/6/21 7:48:29 PM All available features in Genesys CX Insights.
		GCXI Service Report Owner: Administrator Modified: 5/6/21 7:48:29 PM FFSQL report to check the availability of ODBC metadata database connection.	

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

				-
ල් 🗲 🔶 CX Insights				
Create		Dev Reports Owner: Jone Pabley M (1/15/22 6:3455 PM		Miles Owned for the Miles Mile
 ▼ I Shared Reports ▼ I Custom ▶ I Dav Reports 		WI EDS Top (Premyer Modified 11/20/22.441.13 PM		Agent Performance Report Comment Jumenthaliney Incoding 10/23/22 6/37:65 PM
 ▶ miles ▶ miles ▶ miles ▶ miles ▶ miles 	~	Agent Performance Report - 10-25 Owner: Jorna Failing Medified: 10/23/23 6:99:39 P4		Agent Performance Report - Dev Owen: Jamos Babley Hoeffield 12/722 - 453-26 PM
 My Reports My Objects History List My Subscriptions 		Custom Queue Statistics Gueuer, adama2 10/0712-2025-84 Use No ropot to asses the performance of configured queues to understad what percentage of interactions in each queue new accepted within the defined annual levice, and the compare the performance of stach queue in heading interactions.		Interaction Handling Attempt Report - LastVQ Oversit, the Meding 20/212 10:51-14 20/212 10:51-14 Use the regrets to ever equest related data pertaining to agent handling of contact conter interactions, including databation time, and data about the spent's configure a perturbation in the interactions.
— • •		Queue Statistics_Adjusted		Queue Statistics_Adjusted_30Minute
		Modified: 3/1/12/ +49/33 BH The regot is signated by removing Short Akadoned (~<1201) from Calls Entered. Abandoned, and Answer Rate Mail Indextination Modified Interest Interest Interest Interest Interest Interest Interest Interest Interest Interest Interest Interest Inte		Holdfield V2/22 Job.24 PH This report is adjusted by removing Short Alandoned (=<1201) from Galls Entered, Alandoned, and Aessen Rate. Includes 30 minute intervals
		Queue Statistics_Adjusted_CB Owen: Non Ba Visitization Advised on the Collect Collection of Collection Collection Statistics_Collection Collection Collect		Queue Statistics, Adjusted_Hourly Owner: Poul Histori : Dric d by removing Short Alandored (=<120) from Calls Entend, Alandoned, and Ansen Rate. Includes Hourly intervals
		Cuese Summary Report - ALIC Notified: 12/122 bats2 bit Shortwary associated with and the angle market associated with and to compare the preference Entry and Answer Rate Entry Subscriptions Send Rows Export PDF	l (=<120s) from Calls
		Survey Answer Report - Agent Group Owner: -bone Holey Holdind: 11/12/21201201 Ministration of the Answer Adult from cultures answer political autory qualitors, including the number and percentage of times that such answer roas adulted. (In such sport, and organized by application, sport group, qualitors, or answer.		Suttrey retrieve Report - Application Mover, "sent have a set of the
	?	Week Owner, Jane Pathey Hoddlad 11/1227/5226 PM		

4.—Select Add email subscription.

ල් ← → CX Insights > My Subscriptions							?
(S) Classe							
Queue Statistics_Adjusted Owner Inna Ela This report is adjusted by removing Short Abandoned (=<120s) from Calls Entered, Ab	landoned, and Answer Rate	2					
Personal view							
Subscription Name	Owner	Address	Persona	alized		Action	
You do not have any personal views.							
History List							
Subscription Name	Owner	Schedule	Re	cipient	Personalized	Action	Unsubscribe
Queue Statistics Adjusted 12/22/22 9:18:00 PM		(UTC) Every Morning - 6 AM				1	
Add history list subscription							
Add history list subscription Select Ad	1d email						
Add history list subscription Cache Update Subscription Ame	dd email iption.	hedule Borinient		Personalized		Action	
Add history list subscription Cache Update Subscription Name Visid on these are cache undele subscriptions.	dd email iption.	thedule Recipient		Personalized		Action	
Add history list subscription Cache Update Subscription Name You do not have any cache update subscriptons. Add cache update subscripton	dd email iption.	hedule Recipient		Personalized		Action	
Add history list subscription Cache Update Subscription Name You do not have any cache update subscriptores. Add cache update subscription	dd email iption.	Thedule Recipient		Personalized		Action	
Add history list subscription Cache Update Subscription Name You do not have any cache update subscriptors. Add cache update subscripton Email	dd email iption.	chedule Recipient		Personalized		Action	
Add history list subscription Cache Update Subscription Name You do not have any cache update subscriptors. Add cache update subscriptor Email Subscription Name	dd email iption. sc	chedule Recipient	Recipient ∠	Personalized	Personalized L.	Action	Unsubscribe
Add history list subscription Cache Update Subscription Name You do not have any cache update subscriptions. Add cache update subscription Email Subscription Name Till Month to Date Queue Statures Adjusted 12/22/22 9:13:52 FM	dd email iption. sc	thedule Recipient Schedule 4. (UTC) Every Monday - 6 AM	Recipient 4	Personalized	Personalized L.	Action Action	Unsubscribe
Add history list subscription Cache Update Subscription Name You do not have any cache update subscriptors. Add cache update subscriptor Email Subscription Name Month to Date Queue Satisfies: Adjusted 12/22/22 9:13:57.FM Queue Satisfies: Adjusted 12/22/22 9:23:57.FM Queue Satisfies: Adjusted 12/22/22 9:23:57.FM	dd email iption. se owner 4.	thedule Recipient Schedule 4. (UTC) Every Monday - 6 AM (UTC) Every Monday - 6 AM	Recipient L	Personalized Address 4.	Personalized L.	Action Action	Unsubscribe

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

°° + →	CX Insights > My Subscriptions		
- Subscription			
E-mail Subscription			
Name:	Queue Statistics_Adjusted 12/22/22 6:23:36 PM		
Report:	Queue Statistics_Adjusted		
Schedule:	(UTC) Every Morning - 6 AM 🗸		
To:	You have no email address defined. Define an em	ail address before creating a subscription or contact adm	inistrator.
Send:	Data in email 👻	Recipients Browser	×
Delivery Format:	Excel Compress contents	Search far.	
	Expand page-by fields	Nalable: To:	
File Name:	Queue Statistics_Adjusted {&Date}		
Burst		6	
Outlinet	Oursus Chatistics Adjusted (8 Data)		_
Subject:	Queue Statistics_Adjusted (&Date)	0. <u>Bcc</u>	
Message:		0. 0.	
		0. • • • • • • • • • • • • • • • • • • •	_
Send a preview now		Address Name Physical Address Daw(ca Generic email	
Advanced Options		Add To Recipients	
Compression		ок	Cancel
Password prot	tect zip file		
Zin File Name	Queue Statistics Adjusted		
	Queue Statistics_Aujusted	_	
Delivery			
Use contact s	security for each contact group member		

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.
- 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.		
INDEX	х	1. Pre-set Date Filter
Summary of your selection	5	This prompt allows only one selection.
1 Pre-set Date Filter 2 Start Date 3 End Date	*	Available: Selected:
4 Queue Group 5 Media Type 6 Interaction Type 7 Tenant		Today Iday © Last Week Iday © Last Month Iday © Last Monday Iday
		Clast Wedneday Last Wedneday 1 - 21 of 21
OK Cancel		

7.—Scheduled E-mail Delivery Confirmation window pops up.

Select OK.

 Scheduled E-mail Delivery Confirmation

 Your subscription was created successfully.

 Queue Statistics_Adjusted

 Schedule:
 (UTC) Every Morning 6 AM

 Actual time for preview delivery will depend on availability of system resources and result size.

 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 <u>SECTION 11.6 SUBMITTING A GENESYS SUPPORT</u> <u>TICKET</u>.

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.

Queue Statistics_Adjusted 2022-12-22			
*MicroStrategy Distribution Services" <distributionservices@microstrategy.com></distributionservices@microstrategy.com>	These dates reflect the date the report is run.	≪ Reply All	→ Forward Thu 12/22/2022 1:16 PM
Queue Statistics_Adjusted_2022-12-224 p. 4 KB			
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 sat	ie.		

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

	А	В	С	D	E	F	G	Н	1	J	К	L	М	Ν	0	Р
1 2	Queu	e Stat	istics_	Adjust	ed											
3	Tenant	Media Type	Queue	Interactio n Type	Day	Adj Entered	Accepted Agent	Adj Abandone d	Routed Other	Rejected	Adj Answer Rate	ASA	Avg. Talk Time	Avg. Hold Time	Avg. Handle Time	Max Accept Time (Fmt)
4				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
E				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
6	Environmen	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
7	t			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
8				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
9			Total			585	539	42	4	10	92.1%	0:03:14	0:10:17	0:00:16	0:10:39	0:46:35
10		Total				585	539	42	4	10	92.1%	0:03:14	0:10:17	0:00:16	0:10:39	0:46:35
11	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.





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

😴 🗲 🌖 CX Insights > Sha	red Reports > C	ustom				
Create O Recents		Dav Reports Owners I and Pabley Modified: 12/19/23 9:28:05 FM			MilES Owner: Nina Elia Modified: 2/25/22 4:51:10 PM	
Shared Reports Torring Contemports Figure Dev Reports		WI EBS Owner: Top Freesyer Holdflidd 11/28/22 4-91:13 PM			Agent Performance Report Owner: James Pashley Modified: 10/25/22 6:37:55 PM	
► Im Miles ► Im WI EBS		Agent Performance Report - 10-25 Owner: James Pachley Hoddled: 10/25/22 6:59:39 PM			Agent Performance Report - Dev Owner: James Pashley Modified:	
 Em CX insights Em My Reports Em My Objects History List 		Custom Queue Statistics Owner: alame27 Hodified: 10/17/1 22/26 At asset the performance of configured outers, to white the defined service level, and to compare the performance of	Queue Statistics_Adjusted_CB Vener: Nina Elia Adolffied: /11/23 6:33:24 PM his report is adjusted by removing Short. resource address ditt Subscriptions Send Now Export 1	l Abandoned (= PDE	=<120s) from Calls Entered, Abandoned, and	stVQ Is agent handling of contact center interactions, including distribution time, and spacture.
		Queue Statistics_Adjusted Owner: Non Bla Hodified: 11(12) 2:50:70 PM The report is adjusted by removing Short Abandoned (~<120i) from Calls Entered, Abandone	25, and Answer Rate		Queue Statistics_Adjusted_30Minute Owner: Paul Nichael - DHS Hoddfled: 6/22/22 3:04:24 PM This report is adjusted by removing Short Abandoned (- intervals.	<120t) from Calle Externel, Abandoneel, and Answer Rate. Includes 30 minute
		Queue Statistics_Adjusted_CB Gwear, The Bis (11/1236-013/04-04) The report is adjusted by removing short Abandonied (~<1200) from Calls Entered, Abandonie Edit Subaccodes fand flow Exceed TVPE	ed, and Answer Rate	m	Queue Statistics_Adjusted_Hourly Owner: Paul Michael - DHS Modified: 6/22/22 3:04:40 PM This report is adjusted by removing Short Abandened (+	<1200) from Calle Entered, Abandoned, and Anower Rate. Includes Hourly Intervals
		Queue Summary Report - All Columns Owner, Junes Pauley Houffield 10/12/2 at 10:13 PH Use this report to assess the performance of configured queues, to understand what percentis within the defined service level, and to compare the performance of each queue in handing in	ge of interactions in each queue were accepted Interactions.		Short Abandoned Test Report Owner: Nine Ela Modified: 3/4/22 3:33:02 PM	
		Survey Answer Report - Agent Group Owner, James Bahley, 1914220 1914220 Use bite report to larm more about how customers answer post-all survey questions, includin use answer was associated, for each agent and organized by application, agent greap, agention each answer was associated, for each agent and organized by application, agent greap, agention	ng the number and percentage of times that		Survey Answer Report - Application Owner: James Fashley Holdlind: 1/19/22 718/327 PH Use this report to learn more about how customers anny each annew mus selected, for each agent, and organice each annew mus selected, for each agent, and organice	ver post-all survey questions, including the number and percentage of times that B v application, agent group, question, or answer.

4. Select Add history list subscription.

His	tory List
	Subscription Name
You	do not have any History List subscriptions.
Add I	nistory list subscription

5 _	-User makes desired selectiv	ons to the Histor	v List Subscription	and Advanced Ontions
5.	Osci makes desired selection	shis to the mator		and havanced options.

°0° 🗲 🔶	CX Insights > My Subscriptions	
Subscription		
History List Subscripti	ion	
Name:	Agent Performance Report	Recipients Browser X
Dossier.	Agent Performance Report - JP	Search for:
Schedule:	(UTC) Every Morning - 6 AM 🗸	Available: To:
То:	û.	81 9-
Pre-generate export	PDF V PDF Settings	
Advanced Options	mediately	0 0 0
The new sch	eduled report will overwrite older versions of its	elf. 0.
Delivery		0.
Do not delive	er after	OK Cancel
Delivery Notification	Delivery Notifi	ation
Send notification t	o email address:	ation to email address:
To:	New Address: Only one add	Generic email
Send to a new addre	ess Send to an e	ress is allowed when county a subscription.
	ł	

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

- 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.
- 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.
- Run subscription immediately: select this and the system delivers a test report immediately.
- 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**.

(
INDEX	х	1. Pre-set Date Filter		
Summary of your selection	s	This prompt allows only one selection.		
1 Pre-set Date Filter	*	Search for:		
2 Start Date		Auritable		Coloritorde
3 End Date		Today	<u>ـ</u>	Selected:
4 Queue Group		▲ Last Week		s · · · · · · · · · · · · · · · · · · ·
5 Media Type		♦ Last Month		~
6 Interaction Type		♦ Last Sunday		<u> </u>
7 Tenant		S Last Monday	(<
0 Queue	12	📀 Last Tuesday		*
	_	🔷 Last Wednesday		
		1 - 21 of 21	*	
		2. Start Date		
OK Cancel				

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

Scheduled History List Confirmation					
Your subscription was created successfully.					
Queue Statistics_Adjusted_CB					
Schedule: (UTC) Every Morning - 6 AM					
OK					

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

c ← → CX Insights > My Subscriptions							?
⊗ Close							
Queue Statistics_Adjusted_CB Owner Nina Elia This report is adjusted by removing Short Abandoned (=<120s) fro	om Calls Entered, Abandoned,	and Answer Rate					
Personal view							
Subscription Name		Owner	Address	Personalized		Action	
You do not have any personal views.							
History List							
Subscription Name	Owner	Schedule		Recipient	Personalized	Action	Unsubscribe
		(010) 2101 (1000)			<u>C</u>		
Add history list subscription							
Cache Update							
Subscription Name	Owner	Schedule	Recipient	Perso	nalized	Action	
You do not have any cache update subscriptions.							
Add cache update subscription							
Email							
Subscription Name	Owner	Schedule	Recipient	Address	Personalized	Action	
You do not have any email subscriptions.							
Add email subscription							

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 PDE

	> Shared Report	s > Custom	> Queue Statistics_A	djusted_CB	5										Q	
		-													Lastunda	to: 1/12/22 4:20:01 At
REPORT HOME TOOLS - DA	IA - GRID	FORMAT -													Last upoa	te: 1/12/23 4:29:01 AM
← / ∠ 🛄 🖬		⊌ <	- <u>-</u> -	46 B I	a -^											
REPORT OBJECTS 7 ×	REPORT DE	TAILS														7 X
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🕨 🔶 Tenant	PROMPT DE	TAILS														×
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Chura Talk Tima	Prompt 8: Gen	Queue VQ_CB_OUT,	_Esp_VQ_CB_OUT,	_Hmg_VQ_CB_	OUT											
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Avg. Talk Time Cleared Entered Mold Time Mix Accept Time (Fmt) Rejected Rould Other	Prompt 8: Gen Tenant	Queue vo_cs_out, Media Type	Lesp_VQ_CB_OUT,	Hmg_VQ_CB Interaction Type Outbound	OUT Day 2023-01-10	Adj Acc Entered Av 33	epted ent A 24	Adj bandoned 6	Routed Other	Rejected 3	Adj Answer Rate 72.7%	ASA 00:13:28	Avg. Talk Time 00:19:12	Avg. Hold Time 0:00:00	Data rows: 2 Avg. Handle Time 00:19:27	Data columns: 11 Max Accept Time (Emt) 00:36:13
Avg. Talk Time Cleared Entered Hold Time Max Accept Time (Fmt) Rejected Routed Other Short Abandoned Waiting	Prompt 8: Gen Tenant Environment	Queue VQ_CB_OUT; Media Type Voice	Lesp_VQ_CB_OUT, Queue Lesp_VQ_CB_OUT _Gen_VQ_CB_OUT	Hmg_VQ_CB Interaction Type Outbound Outbound	Day 2023-01-10 2023-01-10	Adj Acc Entered A 33 1,677	epted ent A 24 1,593	Adj bandoned 6 21	Routed Other 0 0	Rejected 3 63	Adj Answer Rate 72.7% 95.0%	ASA 00:13:28 00:00:37	Avg. Talk Time 00:19:12 00:13:14	Avg. Hold Time 0:00:00 0:02:25	Data rows: 2 Avg. Handle Time 00:19:27 00:15:57	Data columns: 11 Max Accept Time.(Emt) 00.36.13 00.02.23

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.

°° ← → CX Insig	hts > Home					
	9.0.019.00 Browse					
Create						
@ Recents		-				
Shared Reports	<u></u>	<u> </u>	G			
My Reports	Shared Reports	My Reports	History List	My Subscriptions		
History List						
My Subscriptions	Analyze					
			m,			
	Create Dossier	Add External Data	Upload MicroStrategy File			
	Develop					
	===		T.	?.	ΞĻ	E,
	Create Report	Create Document	Create Filter	Create Prompt	Create Metric	Create Custom Group

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

ල් 🗲 🔶 CX Insig	hts > N	ly Subscriptions								C	
·	Hist	ory List Subscriptions									7
Create		Subscription Name +	Report/Document	4	Owner	Schedule	Recipie	nt	Personalized	Action	Unsubscribe
@ Recents	Π	Queue Statistics Adjusted	Queue Statistics_Ac	ljusted		(UTC) Every Morning - 6 AM	+ Mult	iple		i	
Shared Reports	Π	Queue Statistics Adjusted CB	Queue Statistics_Ac	ljusted_CB		(UTC) Every Morning - 6 AM				1	
My Reports											
History List	E-m	ail Subscriptions									?
		Subscription Name *		Report/Document	Owner	Schedule	Recipient	Address	Personalized	Action	Unsubscribe
My Subscriptions	ш	Month to Date Queue Statistics Adjust	ed 12/22/22 9:13:57 PM	Queue Statistics_Adjus	ted	(UTC) Every Monday - 6 AM				i	
	Π	Queue Statistics Adjusted		Queue Statistics_Adjus	ted	(UTC) Every Morning - 6 AM	Multiple				

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

	CX Insights > My Subscriptions	
Subscription		
E-mail Subscription -		
Name:	Queue Statistics_Adjusted 12/22/22 7:22:16 PM	
Report:	Queue Statistics_Adjusted	
Schedule:	(UTC) Every Morning - 6 AM 🗸	
To:	\checkmark	
Send:	Data in email 🗸	
Delivery Format:	Excel Compress contents	
File Name:	Queue Statistics_Adjusted {&Date} Delimiter:	
DUISL		
Subject:	Queue Statistics_Adjusted {&Date}	0
Subject: Message:	Queue Statistics_Adjusted {&Date}	() ()
Subject: Message:	Queue Statistics_Adjusted {&Date}	6
Subject: Message:	Queue Statistics_Adjusted {&Date}	i
Subject: Message:	Queue Statistics_Adjusted {&Date}	0 0
Subject: Message: Send a preview now Advanced Options	Queue Statistics_Adjusted {&Date}	6
Subject: Message: Send a preview now Advanced Options	Queue Statistics_Adjusted {&Date}	6
Subject: Message: Send a preview now Advanced Options	Queue Statistics_Adjusted {&Date}	6
Subject: Message: Send a preview now Advanced Options	Queue Statistics_Adjusted {&Date}	6
Subject: Message: Send a preview now	Queue Statistics_Adjusted {&Date}	6

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

	CX Insights > My Subscriptions	
 Subscription 		7
E-mail Subscription	N	
Name:	Queue Statistics_Adjusted 12/22/22 7:22:16 PIA	
Report	Queue Statistics_Adjusted	
Schedule:	(UTC) Every Morning - 6 AM 💙	
To:	v	
Send:	Data in email 👻	
Delivery Format:	Excel 👻 🗆 Compress contents	
	Expand page-by fields	
File Name:	Overa Statistics Adjusted (8Date)	
Burst		
Subject:	Queue Statistics_Adjusted (&Date)	
Message:	0	
+ Advanced Options		
Advanced Options	X 1. Pre-set Date Filter	
Advanced Options INDEX Summary of your sele	X 1. Pre-set Date Filter ctions This prompt allows only one selection.	
Advanced Options Advanced Options INDEX Summary of your sele Pre-set Date Filter	X 1. Pre-set Date Filter This prompt allows only one selection. Earch for: Q Q tatch case	
Advanced Options INDEX Summary of your sele Pre-set Date Filter Start Date Send Date	X 1. Pre-set Date Filter The prompt allows only one selection. V Sec(16): Antibility Antibility Antibility	Selected An American
Advanced Options INDEX INDEX I Pre-set Date Filter 2 Start Date 3 End Date 4 Queue Group	X 1. Pre-set Date Filter Ctows The prompt allows only one selection. ▼ Sector (A):: ↓ Assibilit: Today ♦ Match case	Selected:
Advanced Options INDEX Summary of your sele I Pre-set Date Filter Start Date 4 Queue Group 5 Media Type	X 1. Pre-set Date Filter This prompt allows only one selection. Statch for: V Available: Today © Lat Week. V	Selected:
Advanced Options INDEX Summary of your sale Summary of your sale Summary of your sale Sale Advanced Options Advanced Options Sale Sale Sale Sale Sale Sale Sale Sale	X 1. Pre-set Date Filter The prompt allows only one selection. V Available: Today Available: Today V Available: Today V Available: Today V Available: V Today V Available: V Available: V Available: V Available: V Available: V Available: V	Solution Vectoriary D
Advanced Options INDEX Summary of your selee Second Secon	X 1. Pre-set Date Filter This prompt allows only one selection. Sectors Available: Today ♦ Last Honch ♥ Last Honch ♥ Last Honch ♥ Last Honch ♥ Last Honch	Selected: Vectorary R K
Advanced Options INDEX Summary of your sele I Preset Date Filter 2 Start Date 3 End Date 4 Queue Group 5 Media Type 6 Interaction Type 7 Tenant 8 Queue	X 1. Pre-set Date Filter The prompt allows only one selection. V Sectors Today Class Today Class Monday	Selected: Vectorsky 2 2 2 2 2 2 2 2 2 2 2 2 2
Advanced Options INDEX Summary of your sele IPreset Date Filter Start Date 4 Queue Group S Media Type 6 Intraction Type 7 Seaatt 8 Queue	X 1. Pre-set Date Filter The prompt allow solt does electron. V V V V V V V V V V V V V V V V V	Selected.
Advanced Options INDEX Summary of your sele Trevast Uab Filter Start Date Start Date	X 1. Pre-set Date Filter The prompt allows only one selection. Australiable: Today V Today V V Today V V Today V V	Selected: Protectory Selected: () () () () () () () () () ()

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.							
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	9.0.019.00 Browse						
Create							
@ Recents	0						
Shared Reports		A	G	▶ 🖆 📔			
My Reports	Shared Reports	My Reports	History List	My Subscriptions			
My Subscriptions							
	Analyze						
		J	m,				
	Create Dossier	Add External Data	Upload MicroStrategy File				
	Develop						
			Τ.	?	Eh.	E	
	Create Report	Create Document	Create Filter	Create Prompt	Create Metric	Create Custom Group	

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.—

ල් ← → CX In:	sights > My Subscriptions				,			c	2
	E-mail Subscriptions								?
Create	Subscription Name A	Report/Document	Owner	Schedule	Recipient	Address	Personalized	Action	Unsubscribe
Recents	Dueue Statistics Adjusted 12/22/22 7:15:41 PM	Queue Statistics_Adjusted		(UTC) Every Morning - 6 AM					
Shared Reports	III Queue Statistics Adjusted 12/22/22 7:22:16 PM	Queue Statistics_Adjusted		(UTC) Every Morning - 6 AM				B 81	
My Reports									
History List									
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 <u>Section 9.2.5.2</u> <u>Queue Statistics_Adjusted</u>)
- 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 <u>Section 9.2.2.2 History List Subscription</u> 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.
 <u>Show/Hide an example of this report</u>
- Agent Performance Daily tab provides agent performance statistics day over day.
 <u>Show/Hide an example of this report</u>

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

Basic Terminology

I nteractive 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
A vg 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	Hours
	"Not Ready" state, excluding Extended After Call Work (that is, Extended	
	After Call Work is included in Busy Time)	
1		[]

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

					Que	eue Staus	ucs_Aujust	cu_ob							
Tenant	Media	Queue	Interaction	Day	Adj	Accepted	Adj	Routed	Rejected	Adj	ASA	Avg. Talk	Avg. Hold	Avg. Handle	Max Accept
	Type		type		Entered	Agent	Abandoned	Other		Rate		Time	Time	Time	(Fmt)
		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
Environment Voice	Voice	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

г

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	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.

WISCONSIN DEPARTMENT of HEALTH SERVICES	Welcome to your Wisc	consin Department of He	alth Services MGEP Porta	al	
Agent Desktop	Platform Administration	Designer	Historical Reporting	Real-Time Reporting	Unteraction Recording
Workforce Management	Callback Administration				

- 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

<u>11.6 Submitting a Genesys Support Ticket (Video instructions available: Submitting a Genesys Support Ticket, Escalating a Genesys Support Ticket</u>)

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 <u>CWW Gateway Page</u>.—
- 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 <u>Genesys Portal page</u>. 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 <u>Genesys Portal page</u>. Open the Genesys Portal Page in a different browser (Chrome, Firefox or Edge). Save the portal as a favorite in the browser.
	A gent Desktop log- in:-	 All Genesys user IDs are case sensitive. Please ensure use of the correct case.

Can't log		 Be sure to use the correct Tenant: sowi.mgep.info- 	
in, invalid credentials	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 <u>Section 11.6 Submitting a Genesys</u> <u>Support Ticket</u>. 	
	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 <u>Section</u> <u>11.6 Submitting a Genesys Support Ticket.</u> 	
Stuck in "Busy" status	Stuck in "Busy" status and not able to change to "Ready"	 Submit a ticket to the Wisconsin Help Desk. See <u>Section</u> <u>11.6 Submitting a Genesys Support Ticket.</u> 	
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. <u>Show/Hide example</u> i <u>mage</u>	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: <u>Recording Search Troubleshooting</u>)

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	Issue	Description	Resolution
I			

No Connection ID in search	Connection ID column doesn't appear.	•—Add t Colur	the Connection ID by clicking "Select nns" icon
results		S	* *
			Select Columns
		DE	✓ Date / Time ✓ Media
		DE_2021	Vumber of Segments
		20	Agent
			Tags
		25	Duration
		25	Text
			Interaction ID
			External ID
		*	
		5G	🗆 ani
			callerPhoneNumber
		2	C callType
			L CustomerSegment
		-	□ dnis
		20	GSYS_IVR
		29	IApplication
		2	ServiceObjective
			ivr language
		D	Language
		2	🗹 my_conn_id 14
			1 Skall
			ConnectionID
Unknown Connection ID-	Don't have Connection ID to search	• Searc	ch by Agent and date
Missing Recording	Can't find recording in "Interaction Recording"	 There appreciate 	e is a delay while recordings are indexed of oximately 20 minutes.
	search or the ECF.	If the see Section Sectio	telephonic signature is missing in the ECF, ection 7.2.3 Telephonic Signature Recording
		Missi	ng in the ECF.

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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. <u>Process Help 1.6.8</u>
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

- 1. <u>11.6.1 Who Should Submit a Ticket?</u>
- 2. 11.6.2 Opening a Ticket
- 3. 11.6.3 Escalation Process

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: <u>dhsgenesyscloudproject@dhs.wisconsin.gov</u>

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.

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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 <u>helpdesk@wi.gov</u> (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.

Đo	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" 	 <u>"Genesys"</u> <u>"Problems"</u> <u>"Genesys Issue"</u> <u>"Genesys isn't</u> working" <u>"Trouble with</u> 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 <u>dhsgenesyscloudproject@dhs.wisconsin.gov</u> 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 <u>dhsgenesyscloudproject@dhs.wisconsin.gov.</u>

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.

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