

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

To: Genesys User Guide Users

From: Autumn Arnold, Bureau Director
Bureau of Eligibility and Enrollment Policy

Re: **Genesys User Guide Release 24-01**

Release Date: 12/18/2024

Effective Date: 12/18/2024

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

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

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

Table of Contents

2 Accessing Genesys	6
2.1 Logging In to Genesys	7
2.1.1 Account Activation.....	8
2.1.2 First Time Logging In to Genesys After Account Activation.....	12
2.1.3 After Your First Time Logging In to Genesys.....	15
2.5 Change Password.....	18
2.6 Edit Your Profile	20
3 Agent Desktop	22
3.2 Performance	23
3.2.1 My Performance	34
3.2.2 My Status	36
3.2.3 My Interactions.....	38
3.2.4 My Queues Activity.....	39
4 Call Handling	40
4.1 Receiving a Call From a Queue	41
4.1.1 Go On Queue	42
4.1.1.1 Notification of Call	42
4.1.1.2 Ending a Call.....	43
4.1.2 Agent Training Call Flow	45
4.1.2.1 Receiving a Practice Call From the Queue	45
4.3 Making an External Call	51
4.3.1 Ending a Call.....	53
4.5 Transferring a Call.....	54
4.5.1 Transferring a Call to an XFERS Genesys Queue.....	56
4.5.2 Transferring a Call to a Genesys Agent.....	57
4.6 Conference.....	59
4.6.1 Start a Conference	60
4.6.2 Place a Conferenced Party On Hold or Remove Them From the Call.....	61
4.7 Consult	62
4.7.1 Place a Party On Hold or Remove Them From the Call	63
4.7.2 Transfer the Second Party to the Third Party	64
4.7.3 Bring All Parties Together in a Conference Call	65
4.8 Expanding the Interactions Pane	66
4.9 Automated Telephonic Signature (ATS).....	68
6 Supervisors.....	69

6.1 Introduction to Performance	70
6.1.2 Viewing Agent Status	70
6.1.2.1 Agent Status View	70
6.1.2.2 View Status, Secondary Status, and Routing Status	71
6.1.2.3 Add Secondary and Routing Status to the Agent Status View	72
6.1.7 Exporting or Scheduling a Report	75
6.1.7.1 Export a Report	75
6.1.7.2 Schedule a Report	77
6.1.8 Expiring Reports.....	81
6.1.8.1 Renewing Reports	81
7 Local Administrator.....	83
7.2 Setting Business Events - Meetings	84
7.2.1 Scheduling a Meeting Business Event.....	85
7.2.2 Creating Multiple Meeting Business Event Schedules.....	93
7.2.3 Cancelling a Business Event Schedule.....	94
7.5 Agent Accounts	95
7.5.1 Requesting Access for a New Agent	96
7.6 Assigning Queues.....	97
7.6.1 Assign or Unassign a User from a Queue.....	98
7.7 Assigning Languages	101
7.7.1 Assign Agent Skills - English	102
7.7.2 Assign Agent Skills - Spanish	106
7.7.3 Assign Agent Skills - Hmong.....	110
8 Reserved	114
9 Reserved	115
10 Reserved	116
11 Troubleshooting.....	117
11.1	118
11.1 Submitting a Genesys Support Ticket	119
11.1.1 Who Should Submit a Ticket?	120
11.1.2 Opening a Ticket	121
11.1.3 Escalation Process.....	124
11.1.4 Prioritization	125

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](#))

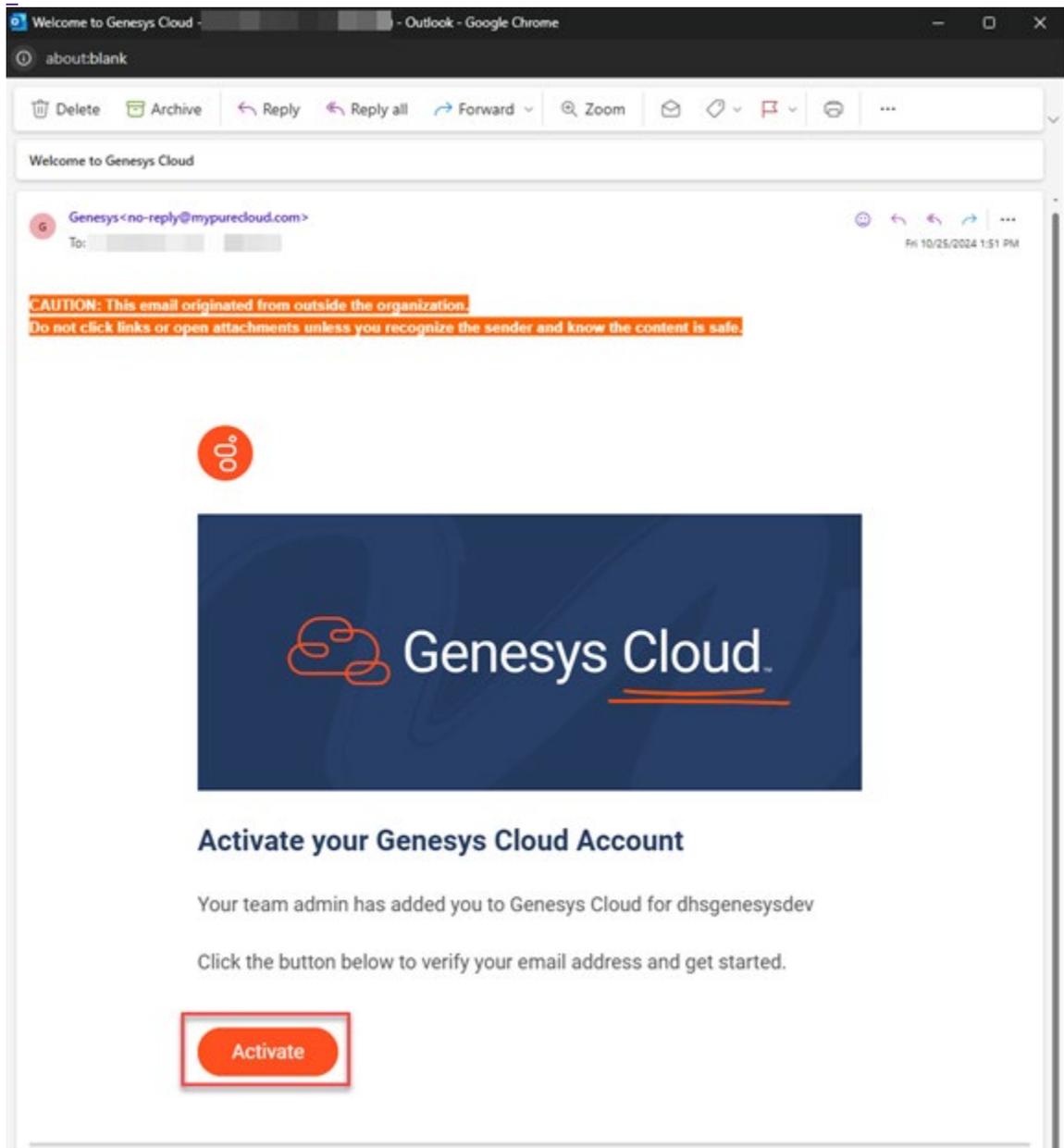
These instructions can be used by agents, supervisors, and local administrators.

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 new password.

 **Genesys Cloud™**

Welcome to Genesys Cloud

 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](#)

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



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 prompted to enter an organization name, use: dhgenesysprod](#)
5. [After successfully activating your account the following message displays, "You have successfully activated your account!"](#)
6. [Select Collaborate/Communicate to begin using Genesys Cloud.](#)

Note

[My Account and Architect are not used.](#)

You have successfully activated your account!

<p> My Account</p> <p>Access and Administer your Genesys Cloud Account settings such as MFA</p>	<p>Collaborate/ Communicate</p> <p>Real-time tools like group chat, video conference, desktop and file sharing, and unified communications</p>	<p>Architect</p> <p>Configure Genesys Cloud call flows, set user & system prompts, and more</p>
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[Logout](#)

2.1.2 First Time Logging In to Genesys After Account Activation

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

4. Click Log In.

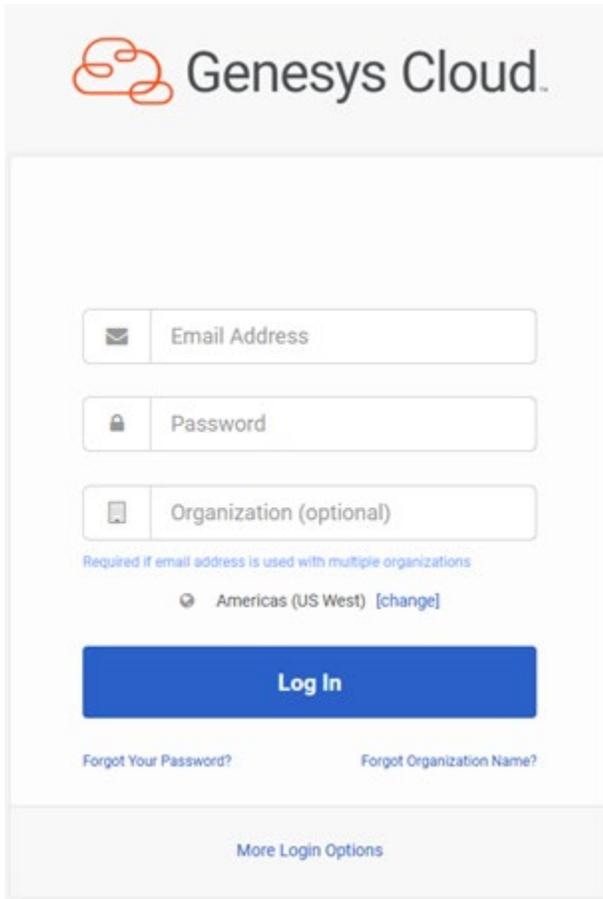
 Genesys Cloud™

 Americas (US West) [\[change\]](#)

Log In

[Forgot Your Password?](#)

[More Login Options](#)



The image shows the Genesys Cloud login page. At the top left is the Genesys Cloud logo, consisting of three interlocking orange circles followed by the text "Genesys Cloud". Below the logo is a white login form with a light gray border. The form contains three input fields: "Email Address" with an envelope icon, "Password" with a lock icon, and "Organization (optional)" with a document icon. Below the organization field is a small blue link: "Required if email address is used with multiple organizations". Underneath is a dropdown menu showing "Americas (US West) [change]". A prominent blue "Log In" button is centered below the fields. At the bottom of the form are two links: "Forgot Your Password?" and "Forgot Organization Name?". Below the form is a light gray bar with the text "More Login Options".

5. [If this screen appears, select Collaborate/Communication to begin using Genesys Cloud.](#)



The image shows the Genesys Cloud dashboard menu. At the top is the Genesys Cloud logo. Below it is a white dashboard area with three main menu items, each in a white box with a light gray border. The first item is "My Account" with a person icon and the description "Access and Administer your Genesys Cloud Account settings such as MFA". The second item is "Collaborate/Communicate" with a red border around it and the description "Real-time tools like group chat, video conference, desktop and file sharing, and unified communications". The third item is "Architect" with the description "Configure Genesys Cloud call flows, set user & system prompts, and more". At the bottom center of the dashboard is a "Logout" link with a plus icon.

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

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

3.1. Click Log In.

Genesys Cloud.

Email Address

Password

Americas (US West) [change]

Log In

[Forgot Your Password?](#)

DHS.Genesy...

[Change Organization]

Genesys Cloud.

Email Address

Password

Organization (optional)

Required if email address is used with multiple organizations

Americas (US West) [change]

Log In

[Forgot Your Password?](#) [Forgot Organization Name?](#)

[More Login Options](#)

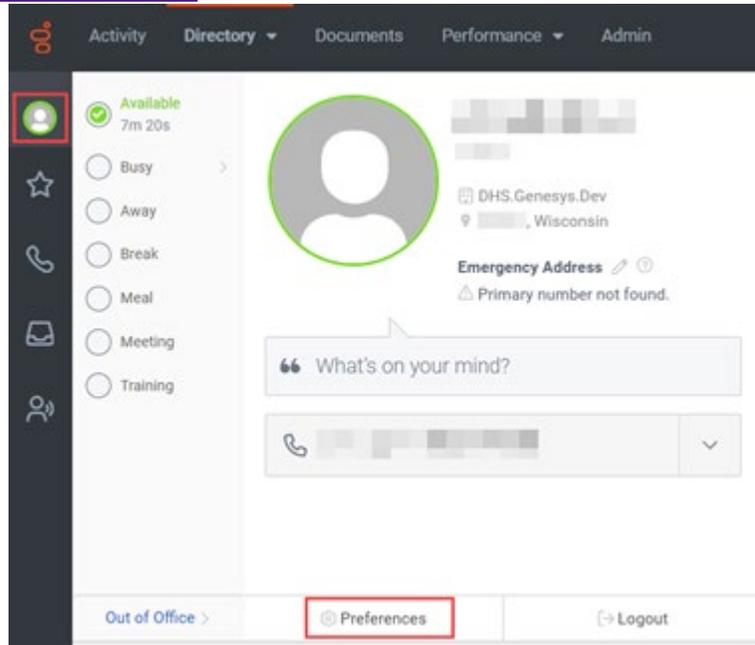
2. If this screen appears, select Collaborate/Communication to begin using Genesys Cloud.



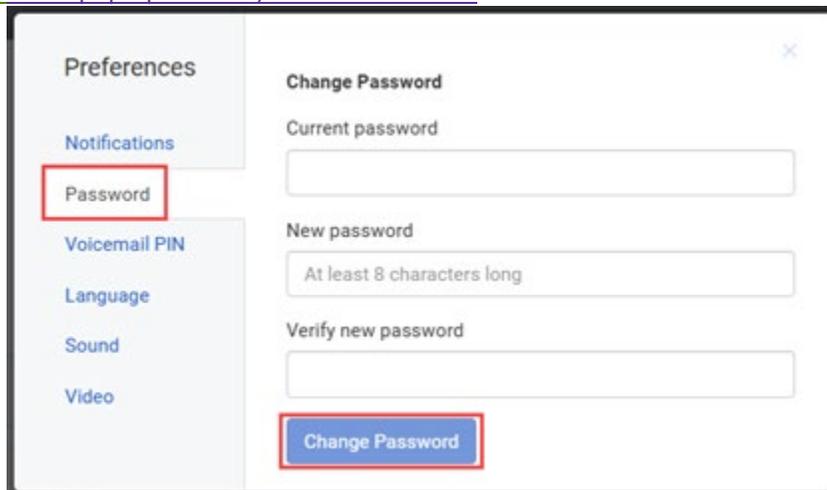
2.5 Change Password

Use these instructions to change your Genesys Cloud password.

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



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



4. Enter your Current password, New password, and Verify new password, in the blank fields.
Password requirements are as follows:

- o The minimum length is eight characters.
- o The maximum length for a password is 400 characters.
- o Passwords must have at least one number, one special character, one uppercase letter, and one lowercase letter.
- o You cannot reuse any of your previous 10 passwords.
- o 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.

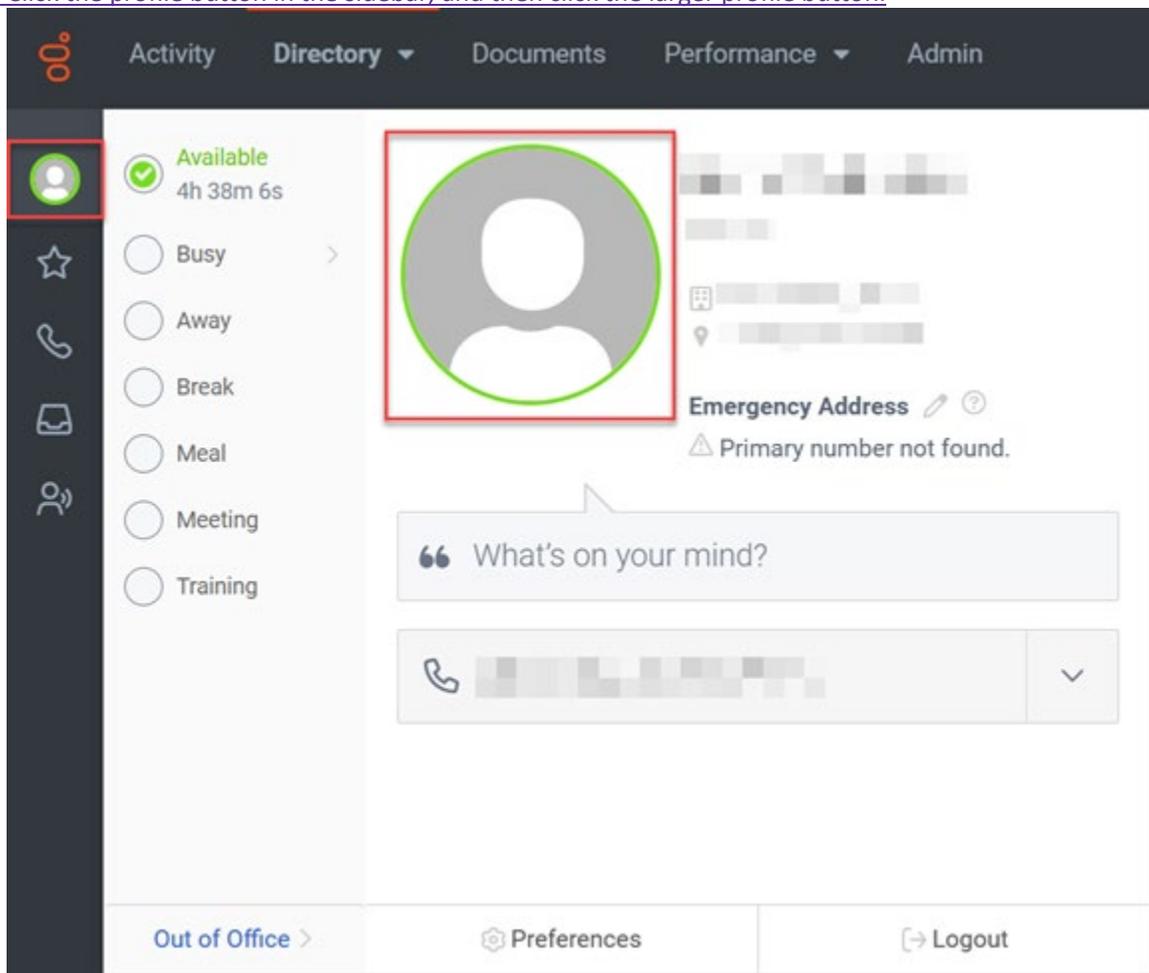
Profiles show users' contact information, status, location, and more. The following information can be updated:

- [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.

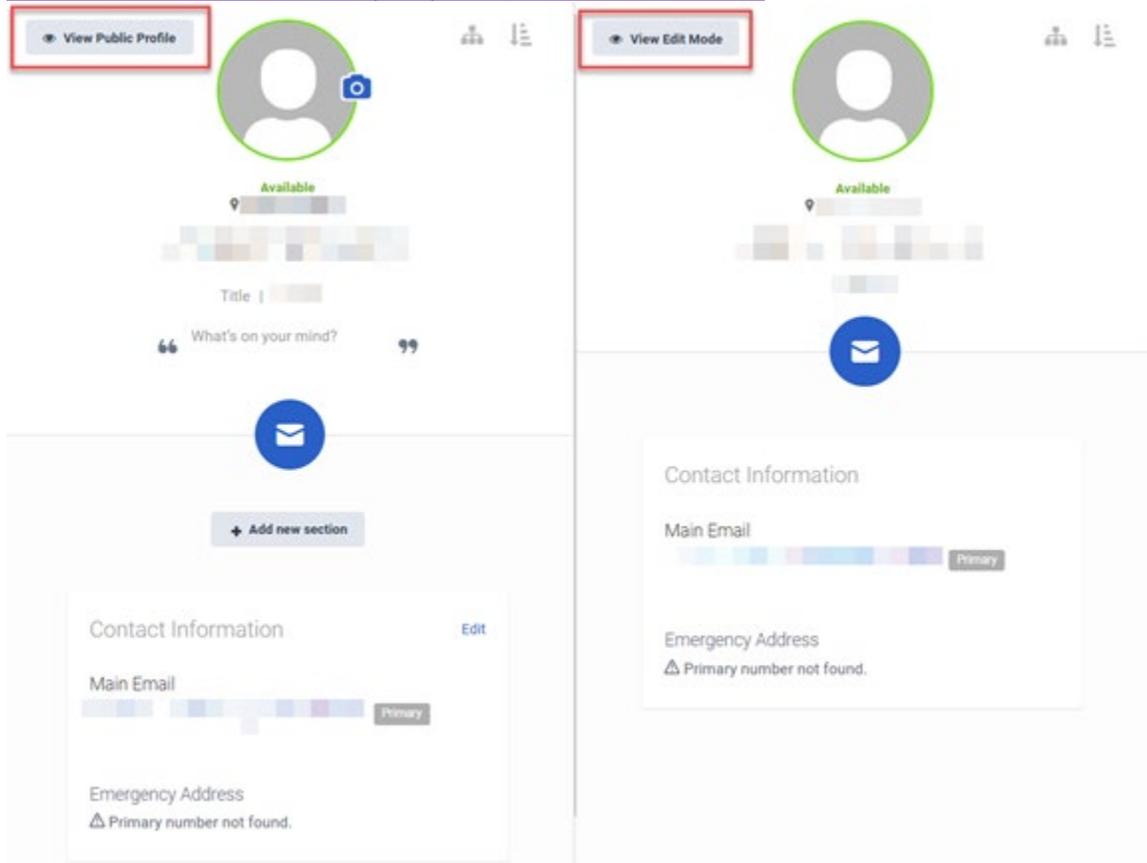
To access and make edits to your profile:

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



The screenshot displays the Genesys user interface. At the top, there is a navigation bar with tabs for Activity, Directory, Documents, Performance, and Admin. On the left, a dark sidebar contains several icons, including a profile icon which is highlighted with a red box. To the right of the sidebar, the user's status is shown as 'Available' with a green checkmark and a timer of '4h 38m 6s'. Below the status are radio buttons for various states: Busy, Away, Break, Meal, Meeting, and Training. The main content area features a large profile picture placeholder, also highlighted with a red box. To the right of the profile picture, there is a section for 'Emergency Address' with a warning icon and the text 'Primary number not found.' Below this is a text input field with the placeholder text 'What's on your mind?'. At the bottom of the page, there are three buttons: 'Out of Office', 'Preferences', and 'Logout'.

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](#)

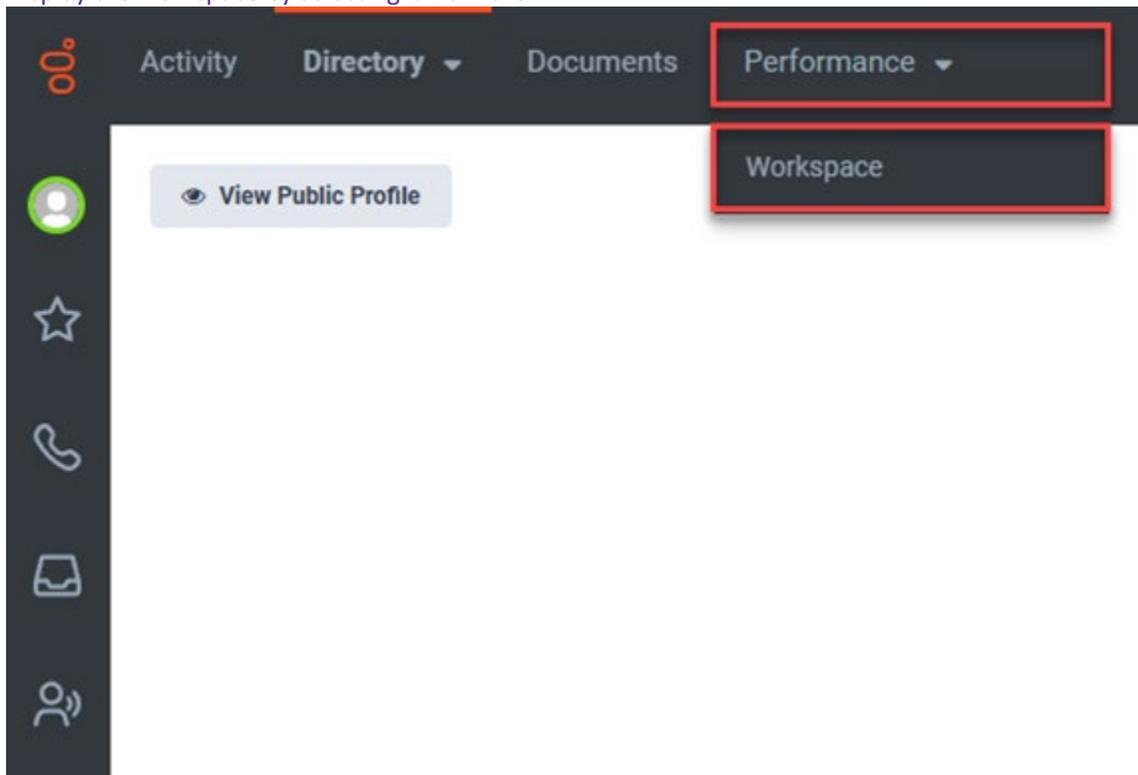
[3.2.4 My Queues Activity](#)

(Video instructions available: [Performance](#))

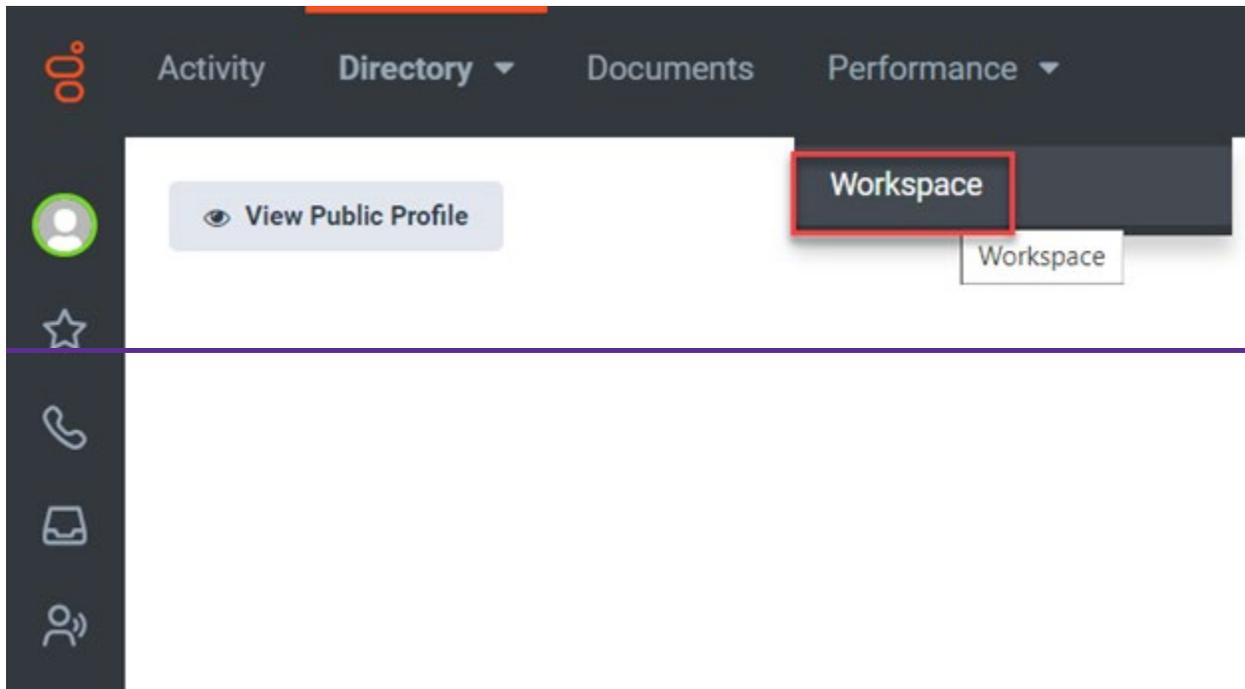
Use the Performance Workspace to view personal statistics, statistics of assigned queues, and interactions. Select the help button in the bottom left corner of the window for help text specific to this view.

Click Performance, and then click Workspace.

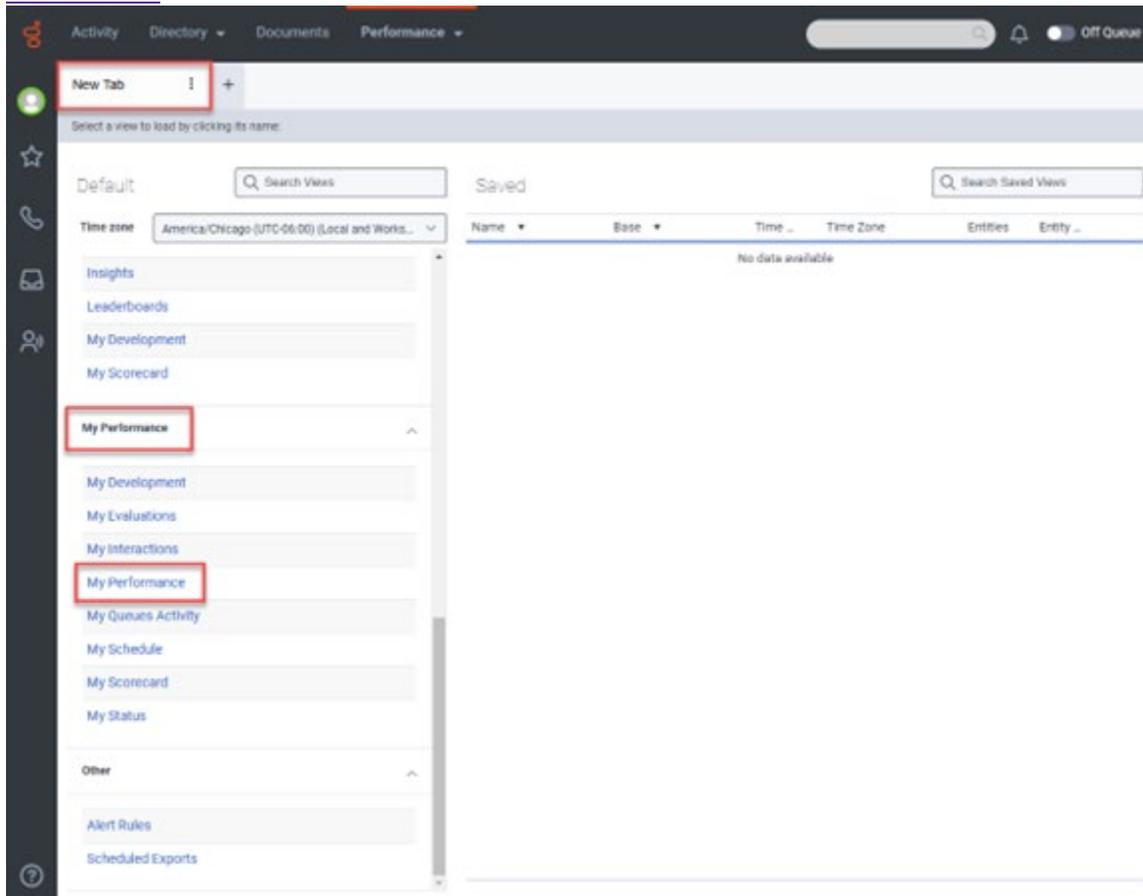
Display the workspace by selecting it from the



From the Performance drop-down menu.



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



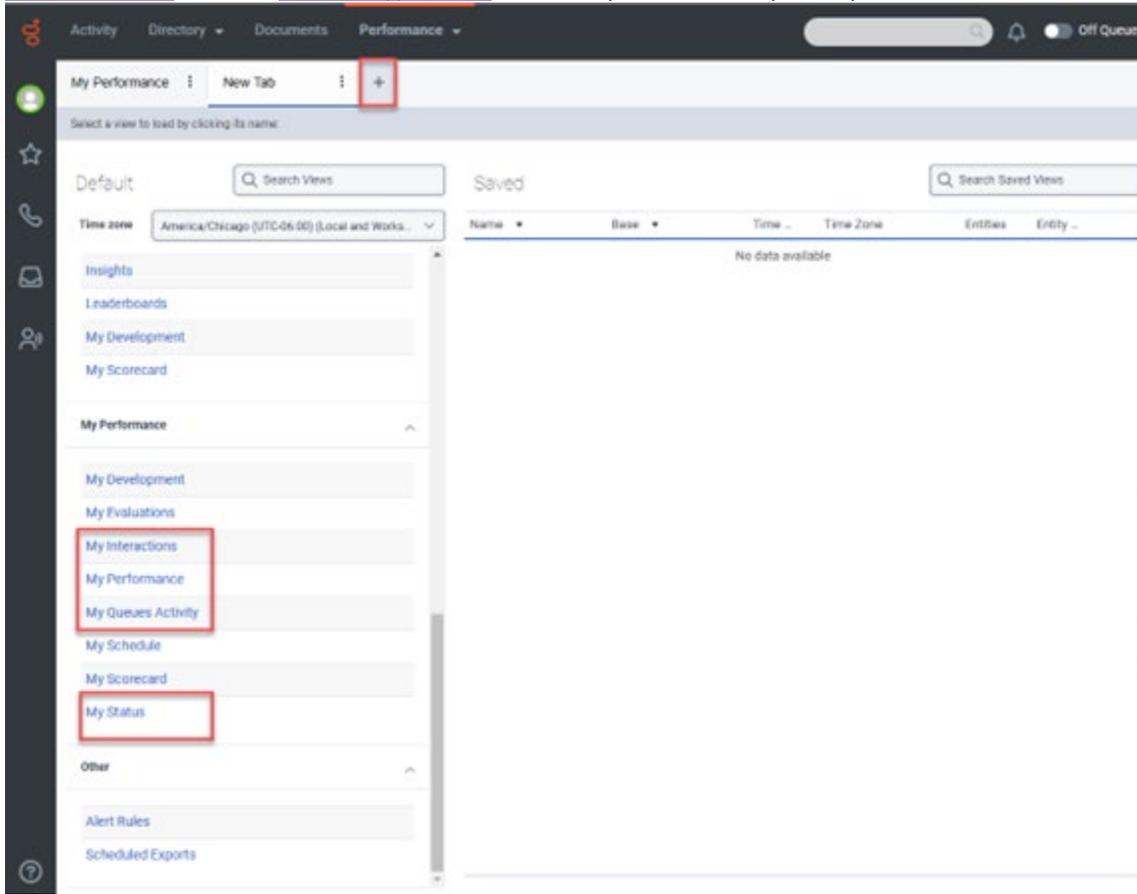
From the My Performance tab you can toggle between Performance, Statuses, ~~or~~ and Interactions to display details for each tab.

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

Date	Answer	Handle	Avg Handle	Avg Talk	Avg Hold	Avg ACW	Hold	Transfer
Apr 15, 2024	-	-	-	15s	-	-	-	-
Apr 16, 2024	-	7	3h 39m 44s	-	-	3h 39m 28s	-	-
Apr 17, 2024	-	-	-	-	-	-	-	-
Apr 18, 2024	-	-	-	-	-	-	-	-
Apr 19, 2024	-	-	-	22s	-	-	-	-
Apr 20, 2024	-	-	-	-	-	-	-	-
Apr 21, 2024	-	1	1 day	-	-	1 day	-	-
Apr 22, 2024	1	9	6m 29s	17s	-	6m 56s	-	-
Apr 23, 2024	-	-	-	-	-	-	-	-
Apr 24, 2024	6	11	8m 10s	11s	-	7m 59s	-	-
Apr 25, 2024	-	20	14m 14s	21s	8s	18m 28s	2	1
Apr 26, 2024	-	1	24s	7s	-	16s	-	-
Apr 27, 2024	-	-	-	-	-	-	-	-

Interval	Answer	Handle	Avg Handle	Avg Talk	Avg Hold	Avg ACW	Hold	Transfer
8:00 AM	-	-	-	-	-	-	-	-
8:30 AM	-	-	-	-	-	-	-	-
9:00 AM	-	-	-	-	-	-	-	-
9:30 AM	-	-	-	-	-	-	-	-
10:00 AM	-	-	-	-	-	-	-	-
10:30 AM	-	-	-	-	-	-	-	-
11:00 AM	-	-	-	-	-	-	-	-
11:30 AM	-	-	-	-	-	-	-	-
12:00 PM	-	-	-	-	-	-	-	-
12:30 PM	-	-	-	-	-	-	-	-
1:00 PM	-	-	-	-	-	-	-	-
1:30 PM	-	1	4m 46s	4m 15s	-	16s	-	1
2:00 PM	-	-	-	-	-	-	-	-
2:30 PM	-	-	-	-	-	-	-	-
3:00 PM	-	-	-	-	-	-	-	-

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



Activity Directory Documents Performance

My Performance New Tab +

Select a view to load by clicking its name:

Default Search Views

Time zone: America/Chicago (UTC-05:00) (Local and Works...)

Employee Engagement

My Development

My Performance

Saved Search Saved Views

Name	Base	Time Pe...	Time Zone	Entities	Entity C...
Test	My Interactions	None	-	-	0

My Development

My Evaluations

My Interactions

My Performance

My Queues Activity

My Schedule

My Status

Other

Scheduled Exports

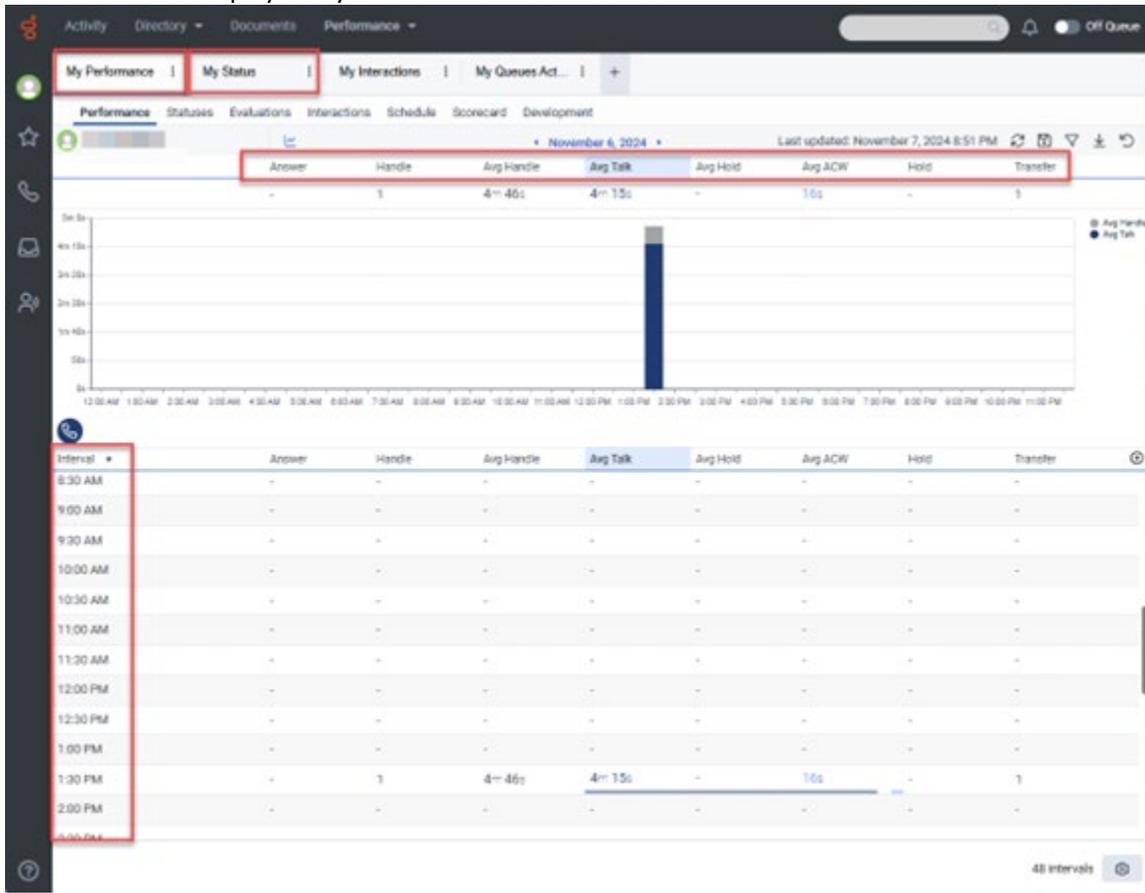
You can perform this step multiple times until all desired tabs are displayed. Recommended views include: My Interactions, My Performance, My Queues Activity, and My Status.

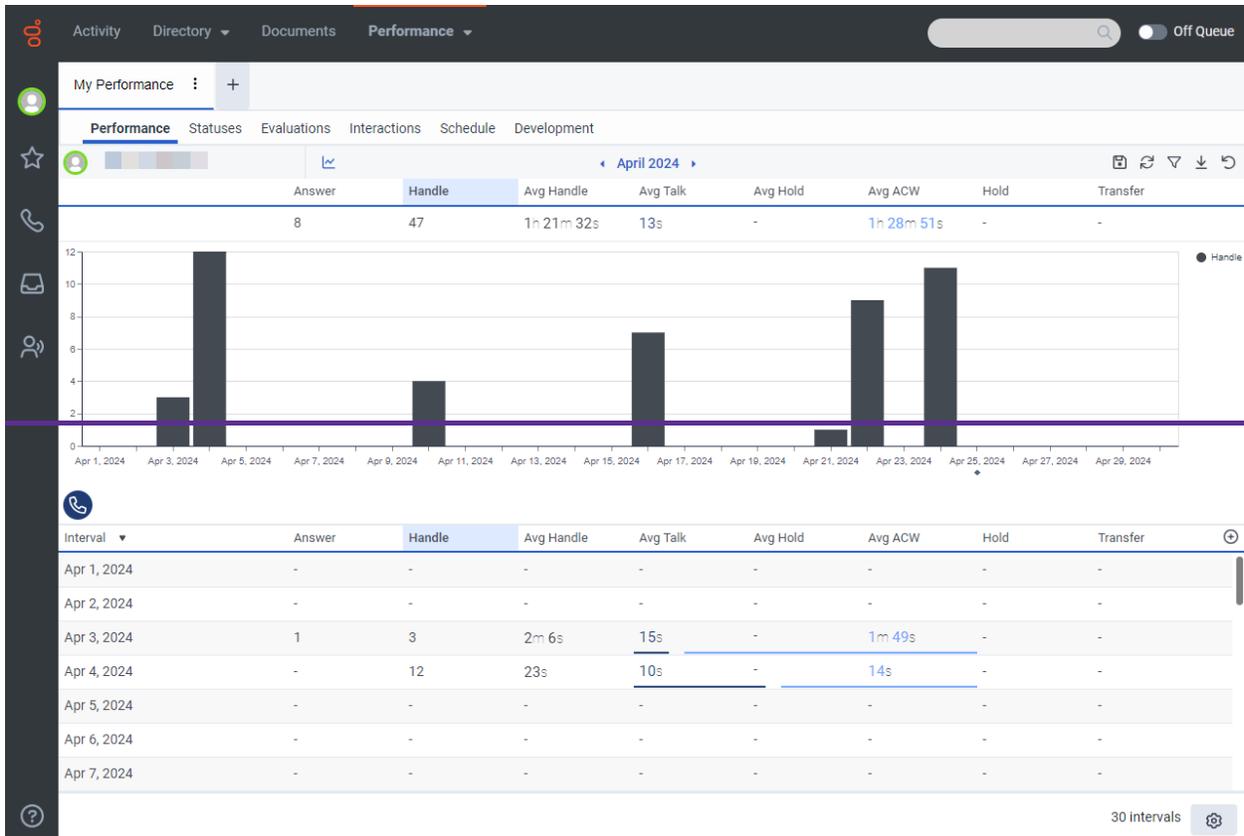
The screenshot shows a performance dashboard with a navigation bar at the top containing 'Activity', 'Directory', 'Documents', and 'Performance'. Below this is a tabbed interface with 'My Performance', 'My Status', 'My Interactions', and 'My Queues Act...'. The 'My Performance' tab is active, displaying a table with columns for 'Answer', 'Handle', 'Avg Handle', 'Avg Talk', 'Avg Hold', 'Avg ACW', 'Hold', and 'Transfer'. The table shows data for November 6, 2024, with a summary row at the top and a detailed row for each 30-minute interval from 8:00 AM to 5:00 PM. The summary row shows values: Answer: -, Handle: 1, Avg Handle: 4m 46s, Avg Talk: 4m 15s, Avg Hold: -, Avg ACW: 16s, Hold: -, Transfer: 1. The interval row for 1:30 PM shows the same values.

Interval	Answer	Handle	Avg Handle	Avg Talk	Avg Hold	Avg ACW	Hold	Transfer
8:00 AM	-	-	-	-	-	-	-	-
8:30 AM	-	-	-	-	-	-	-	-
9:00 AM	-	-	-	-	-	-	-	-
9:30 AM	-	-	-	-	-	-	-	-
10:00 AM	-	-	-	-	-	-	-	-
10:30 AM	-	-	-	-	-	-	-	-
11:00 AM	-	-	-	-	-	-	-	-
11:30 AM	-	-	-	-	-	-	-	-
12:00 PM	-	-	-	-	-	-	-	-
12:30 PM	-	-	-	-	-	-	-	-
1:00 PM	-	-	-	-	-	-	-	-
1:30 PM	-	1	4m 46s	4m 15s	-	16s	-	1
2:00 PM	-	-	-	-	-	-	-	-
2:30 PM	-	-	-	-	-	-	-	-
3:00 PM	-	-	-	-	-	-	-	-
3:30 PM	-	-	-	-	-	-	-	-
4:00 PM	-	-	-	-	-	-	-	-
4:30 PM	-	-	-	-	-	-	-	-
5:00 PM	-	-	-	-	-	-	-	-

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

table below that displays daily details in half hour intervals.





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

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

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

◀ April 2024 ▶

PRESETS

- Today
- Yesterday
- This week
- Last week
- Previous 7 days
- This month
- This month by week
- Last month
- Previous 30 days
- Previous 3 months

Day

Week

Month

Month by Week

Time zone

America/Chicago (U... ▼)

April 2024							May 2024						
Sun	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Mon	Tue	Wed	Thu	Fri	Sat
	1	2	3	4	5	6			1	2	3	4	
7	8	9	10	11	12	13	5	6	7	8	9	10	11
14	15	16	17	18	19	20	12	13	14	15	16	17	18
21	22	23	24	25	26	27	19	20	21	22	23	24	25
28	29	30					26	27	28	29	30	31	

12 : 00 AM

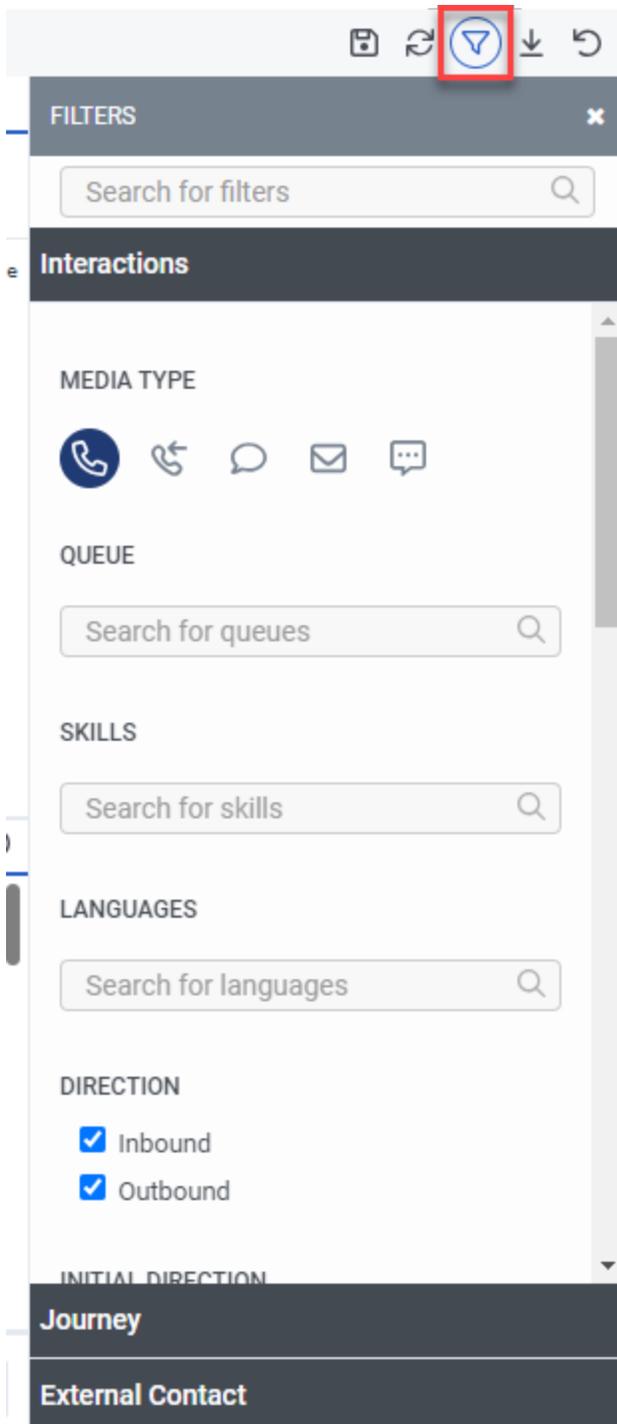
12 : 00 AM

START: 04/01/2024 12:00 AM

END: 05/01/2024 12:00 AM

➔

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



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

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

The screenshot shows the Genesys Performance dashboard. At the top, there are navigation tabs: Activity, Directory, Documents, and Performance. Below this is a 'My Performance' section with sub-tabs: Performance, Statuses, Evaluations, Interactions, Schedule, and Development. The main area displays a table of performance metrics for April 2024, with columns for Answer, Handle, Avg Han..., Avg Talk, Avg Hold, Avg ACW, Hold, and Transfer. A bar chart is visible below the table, showing performance over time. On the right, a 'TABLE COLUMNS' panel is open, listing various performance metrics with checkboxes. A red box highlights the 'Save' button in the top right of the table area.

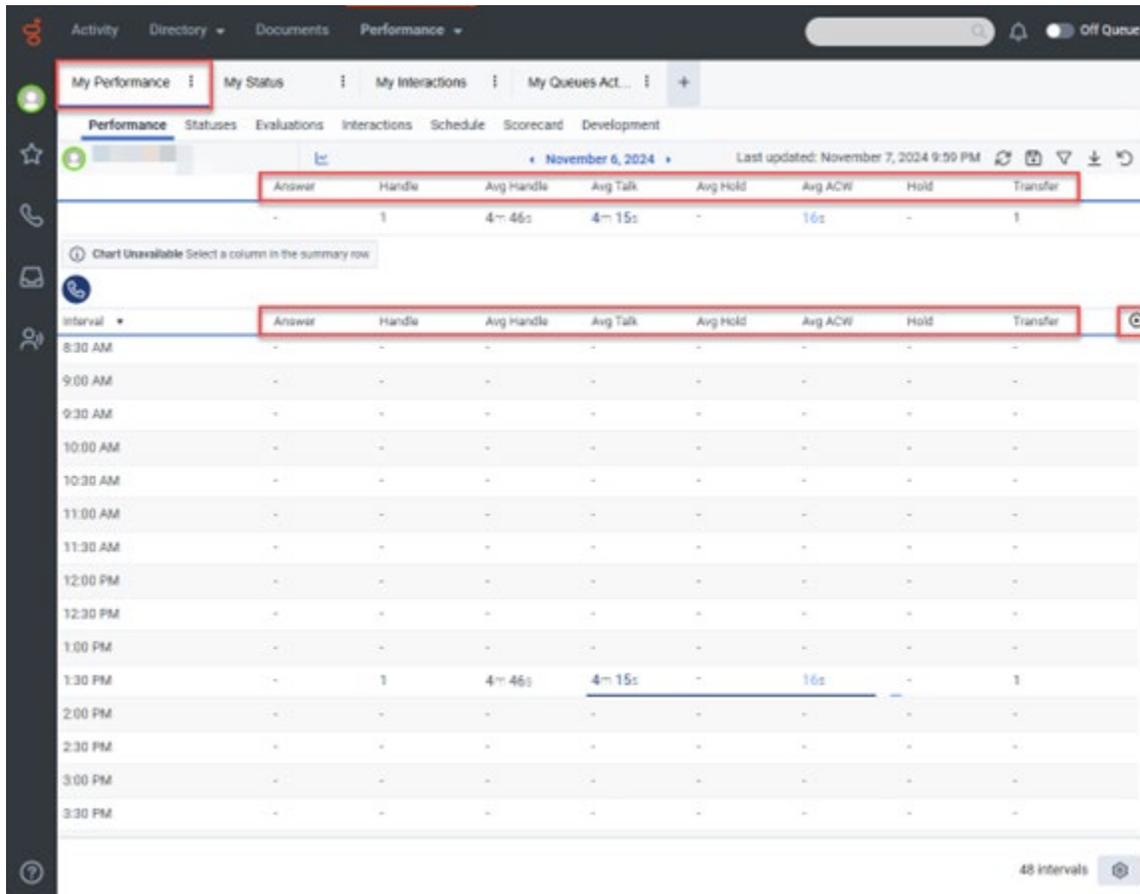
Interval	Answer	Handle	Avg Han...	Avg Talk	Avg Hold	Avg ACW	Hold	Transfer
Apr 1, 2024	-	-	-	-	-	-	-	-
Apr 2, 2024	-	-	-	-	-	-	-	-
Apr 3, 2024	1	3	6s	15s	-	1m 49s	-	-
Apr 4, 2024	-	12	23s	10s	-	14s	-	-
Apr 5, 2024	-	-	-	-	-	-	-	-
Apr 6, 2024	-	-	-	-	-	-	-	-
Apr 7, 2024	-	-	-	-	-	-	-	-

Click the save button to save your desired view.

The screenshot shows the 'Save view' dialog box. It has a title bar with a close button and a 'Save View As' section with a dropdown menu set to 'Overwrite Existing View'. Below this is a 'View Name' field with a placeholder 'Enter view name', a 'Default time period' dropdown set to 'None', and 'Save' and 'Cancel' buttons at the bottom.

3.2.1 My Performance

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

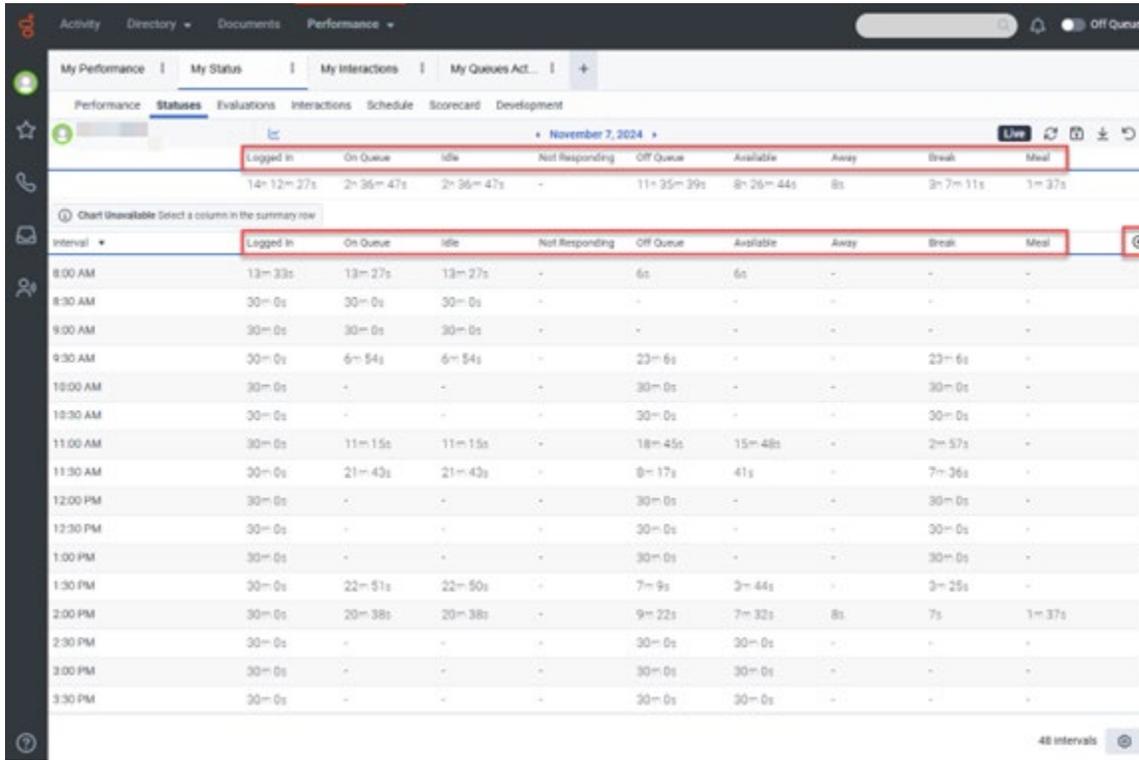


Metric	Description	Live Update
Answer	A measurement of the number of assigned ACD interactions answered by an agent in a given period. Answered increments when the agent is the first to connect to the interaction.	Yes
Handle	The total number of ACD and non-ACD interactions that agents were involved in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

<u>Avg Talk</u>	<p>The average number of seconds spent interacting on a media type.</p> <p>Calculated: $\frac{\text{Total Talk Time}}{\text{Count of Interactions with Talk Time}}$</p>	<u>Yes</u>
<u>Avg Hold</u>	<p>The average number of seconds that interactions were placed on hold.</p> <p>Calculated: $\frac{\text{Total Hold Time}}{\text{Count of Interactions}}$</p>	<u>Yes</u>
<u>Avg ACW</u>	<p>The average amount of time agents spent completing after-call work.</p> <p>Calculated: $\frac{\text{Total ACW}}{\text{Interactions with ACW}}$</p>	<u>Yes</u>
<u>Hold</u>	<u>The number of interactions with holds.</u>	<u>Yes</u>
<u>Transfer</u>	<p>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.</p> <p>Calculated: $\frac{\text{Number of interactions blind transferred or consult transferred}}{\text{Total Interactions}}$</p>	<u>Yes</u>

3.2.2 My Status

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

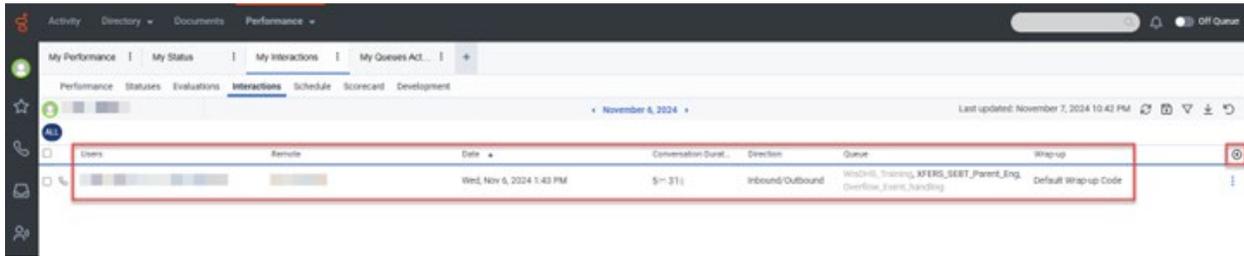


Metric	Description	Live Update
Logged In	The total amount of time a user is logged in for the specified period.	Yes
On Queue	The On Queue metric represents the number of agents that are on queue for a specific queue.	Yes
Idle	The amount of time an agent spends in the Idle routing status. This routing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

<u>Off Queue</u>	<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.</u>	<u>Yes</u>
<u>Available</u>	<u>Time spent in the Available status for the specified period.</u>	<u>Yes</u>
<u>Away</u>	<u>Time spent in the Away status for the specified period.</u>	<u>Yes</u>
<u>Break</u>	<u>Time spent in the Break status for the specified period.</u>	<u>Yes</u>
<u>Meal</u>	<u>Time spent in the Meal status for a specified period.</u>	<u>Yes</u>

3.2.3 My Interactions

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



Metric	Description
Users	The internal users alerted or involved.
Remote	Information about the external participants. <div style="border: 1px solid gray; padding: 2px; display: inline-block;"> Note PII is masked in this view. </div>
Date	The date the interaction started.
Conversation Duration	The length of the interaction. Calculated: (Conversation End – Conversation Start)
Direction	Whether the interaction was inbound, outbound, or inbound/outbound.
Queue	The associated queues.
Wrap-up	The wrap-up code selected by the agent.

3.2.4 My Queues Activity

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



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

4 Call Handling

[4.1 Receiving a Call From a Queue](#)4.1 Receiving a Call From a Queue (Video instructions available: [Receiving a Call From a Queue](#))

[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 Call](#)4.3 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 Call](#)4.5 Transferring a Call (Video instructions available: [- Transferring a Call](#))

[4.5.2 Conference](#)4.5.1 Transferring a Call to an XFERS Genesys 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

[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](#)

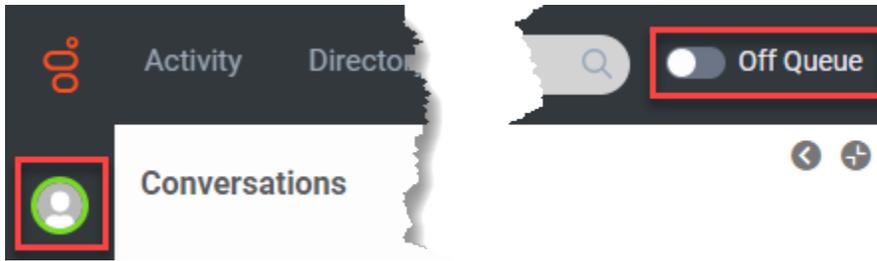
(Video instructions available: [Receiving a Call From a Queue](#))

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

4.1.1 Go On Queue

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

Off queue:



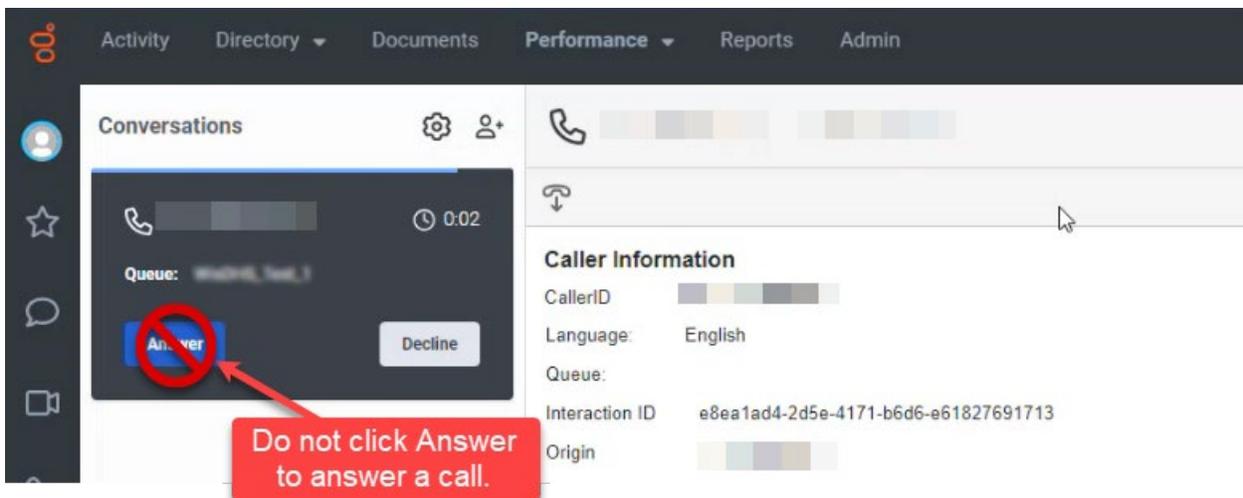
On queue:



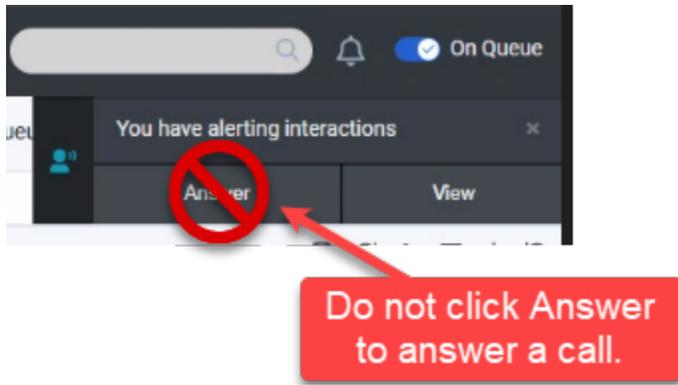
4.1.1.1 Notification of Call

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

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

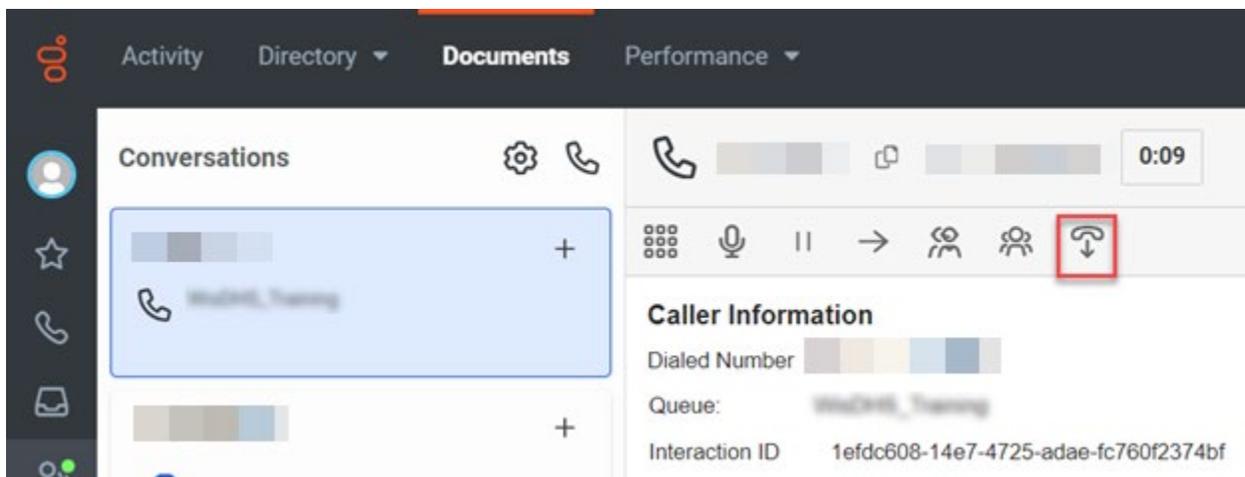


If the notification pane is not open, the call notification displays in the top right corner of the content viewer.



4.1.1.2 Ending a Call

Click the end call button to end the call.



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

Activity Directory Documents Performance

Conversations 0:15

WuOH3_Training just now

Caller Information

Dialed Number
tel: [redacted]

Queue:
WuOH3_Training

Interaction ID
a6b26600-4961-4066-8eda-6dea9695f1

Call Type:
Inbound Call

Automated Telephonic Signature

After Call Work (Optional) 0:10

Find wrap-up code

[Default Wrap-up Code](#)

Wrap-up code is set
Default Wrap-up Code

Done

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

4.1.2 Agent Training Call Flow

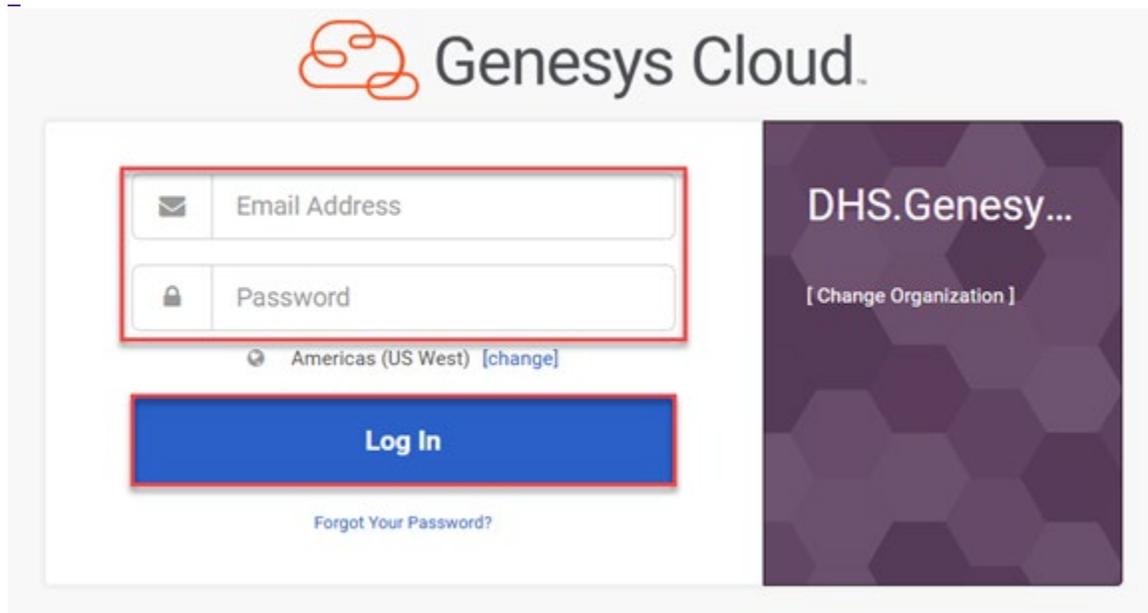
The agent training call flow is a way for the agent to practice receiving calls from the queue and to familiarize themselves with Genesys Cloud before receiving live calls. Agents can use the training call to practice using the different features in Genesys such as receiving and transferring a call,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

4.1.2.1 Receiving a Practice Call From the Queue

[\(Video instructions available: Receiving a Practice Call From the Queue\)](#)

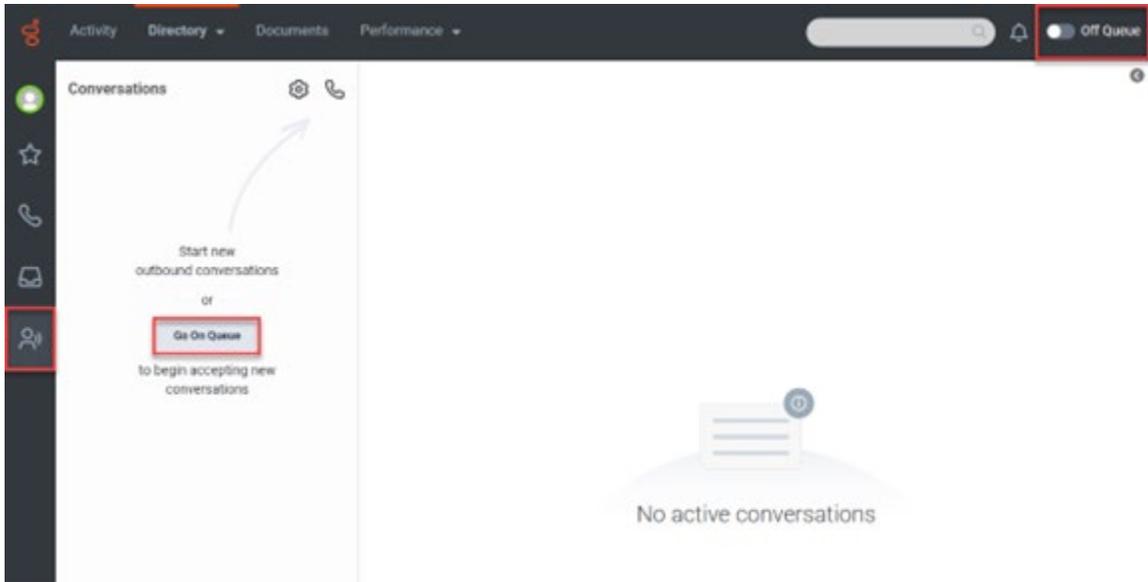
Each agent is given a five-digit training ID number received from their supervisor, Administrator, or the Genesys Cloud team. The five-digit training ID is required to receive calls from the training queue.

1. [Enter your log in credentials, click Log In.](#)

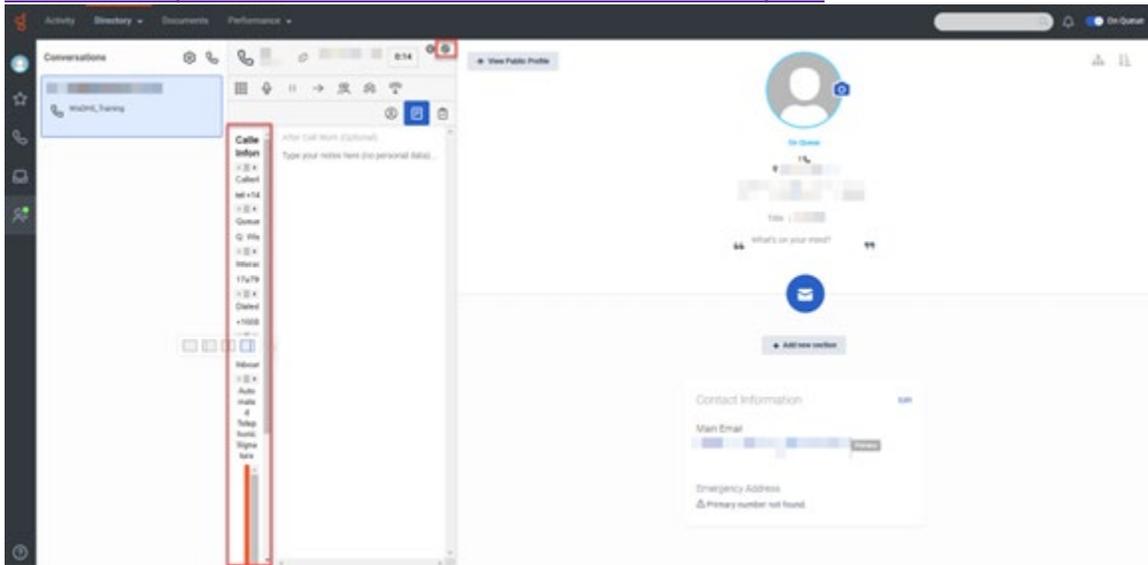


2. [Click the GO On Queue button from the Interactions tab or click the Off Queue toggle button to On Queue in the main menu. By default, your status is set to Available \(Off Queue\) when you first log in.](#)

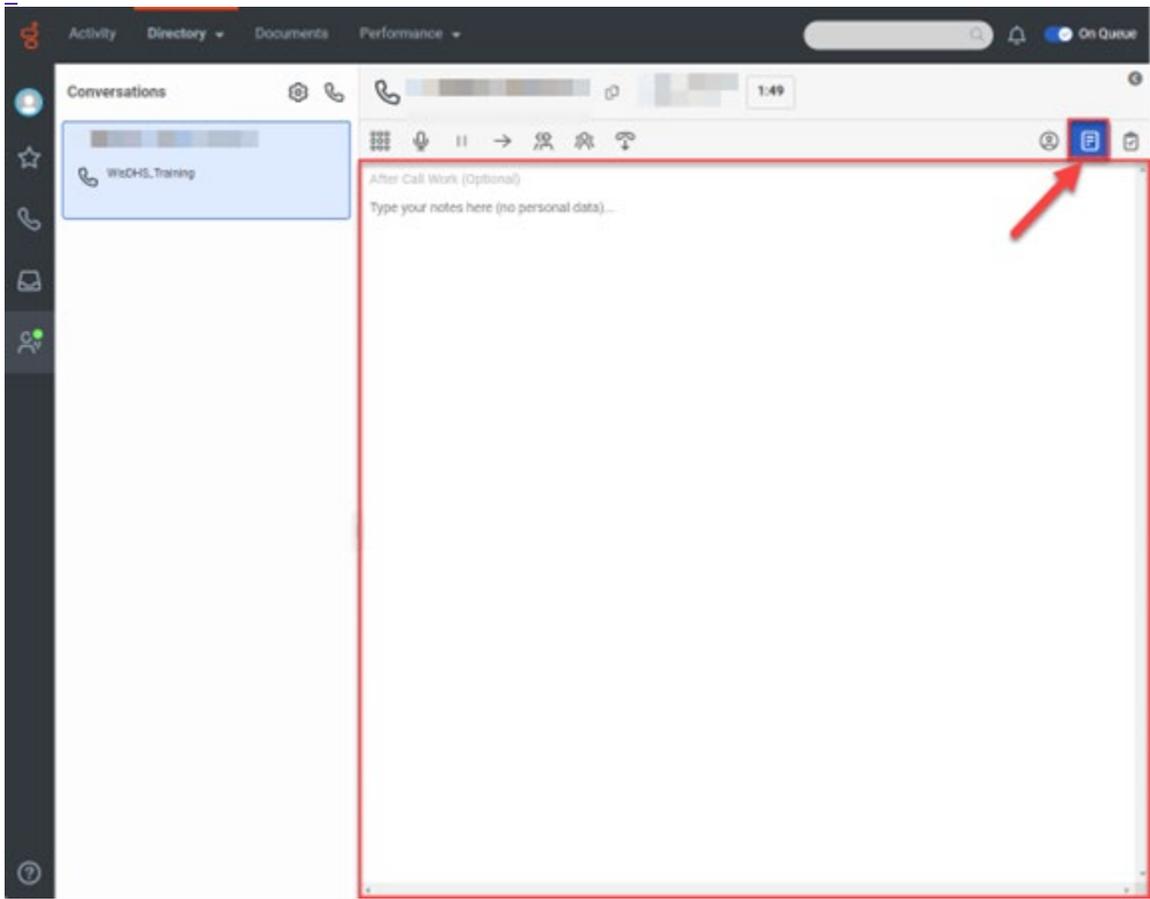
Note [If the agent is assigned to other queues other than the training queue, this could result in live calls.](#)



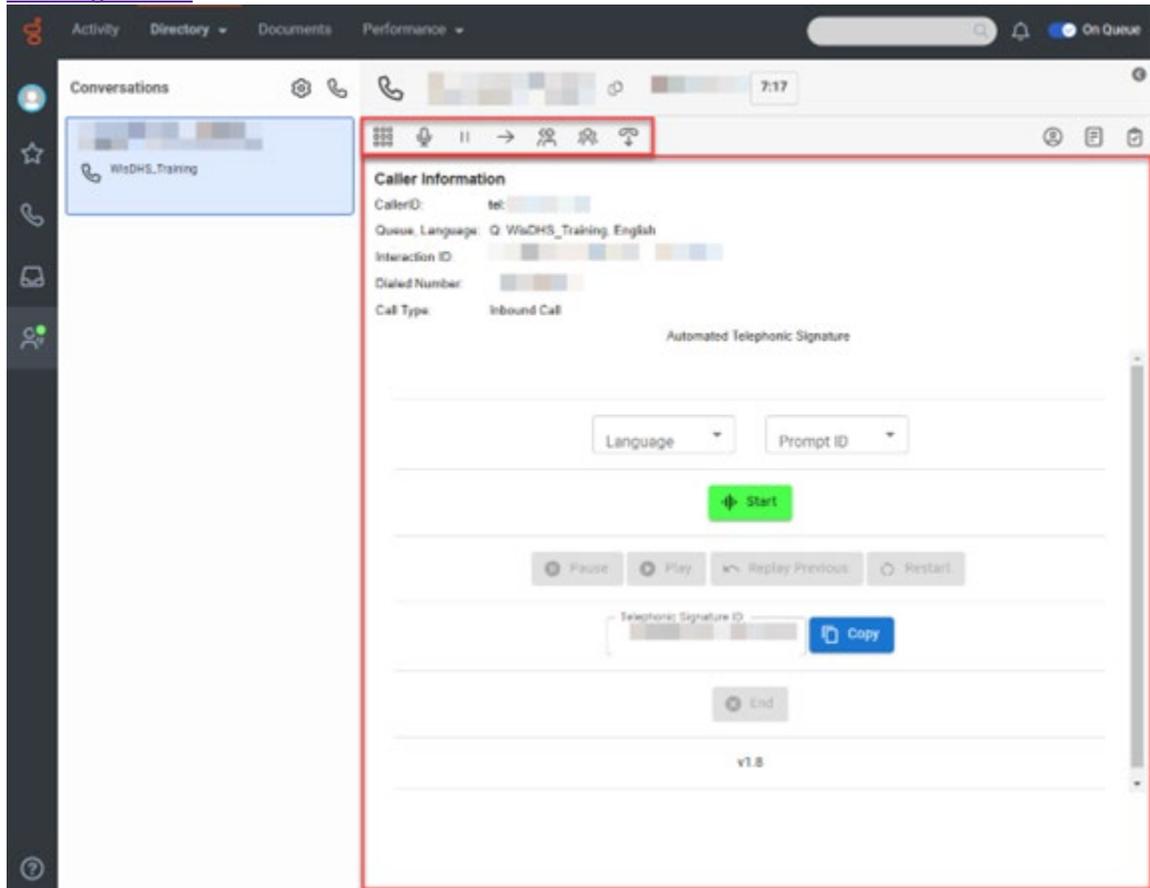
3. [Dial 608-893-6918 from a phone other than your agent phone.](#)
4. [Enter your training ID when prompted.](#)
5. [You should receive a call appearing to come from the queue.](#)
6. [Do not click the Answer button in Genesys Cloud. Answer your phone. When the call comes in your screen may have different views.](#)
[Click on the Expand button if the Caller Information section is collapsed.](#)



[Click on the notes button to see the Caller Information view.](#)

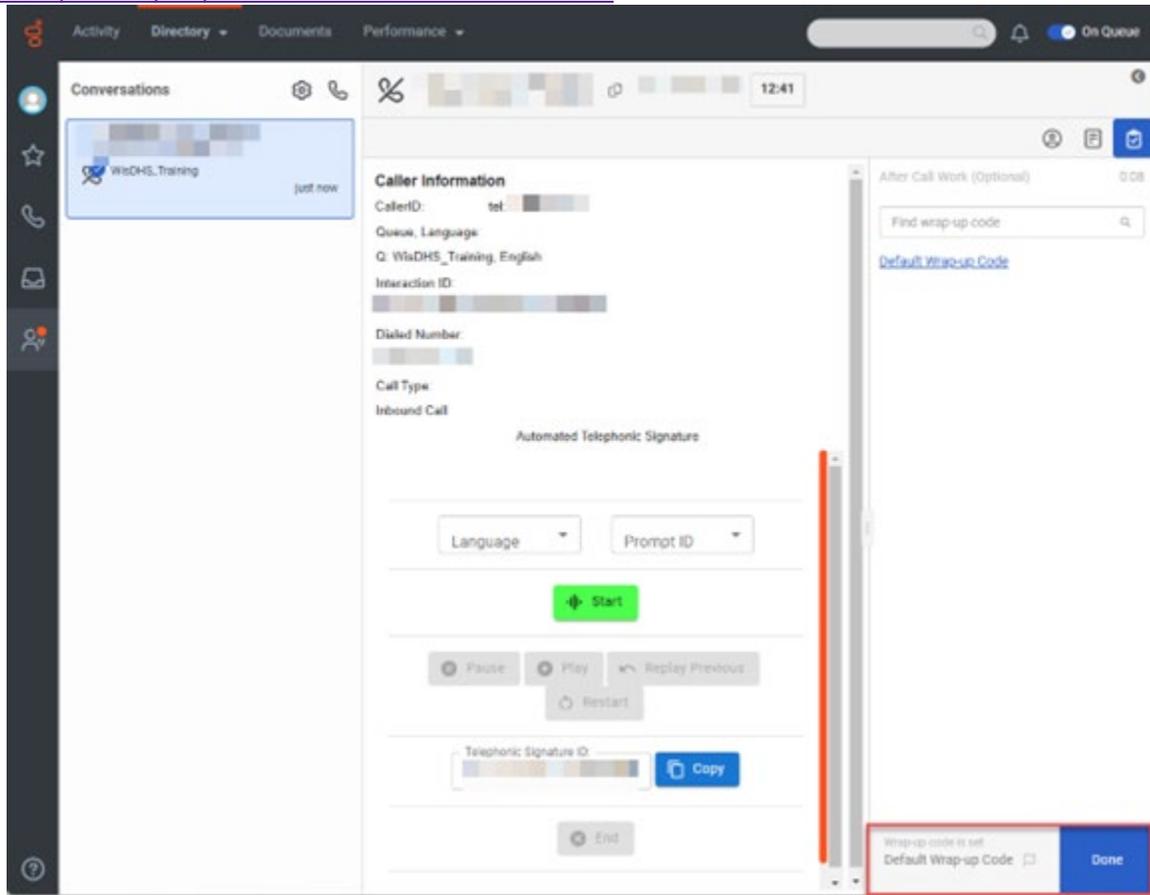


7. While on the call, notice the Caller Information section and practice the functionality within the call handling ribbon.

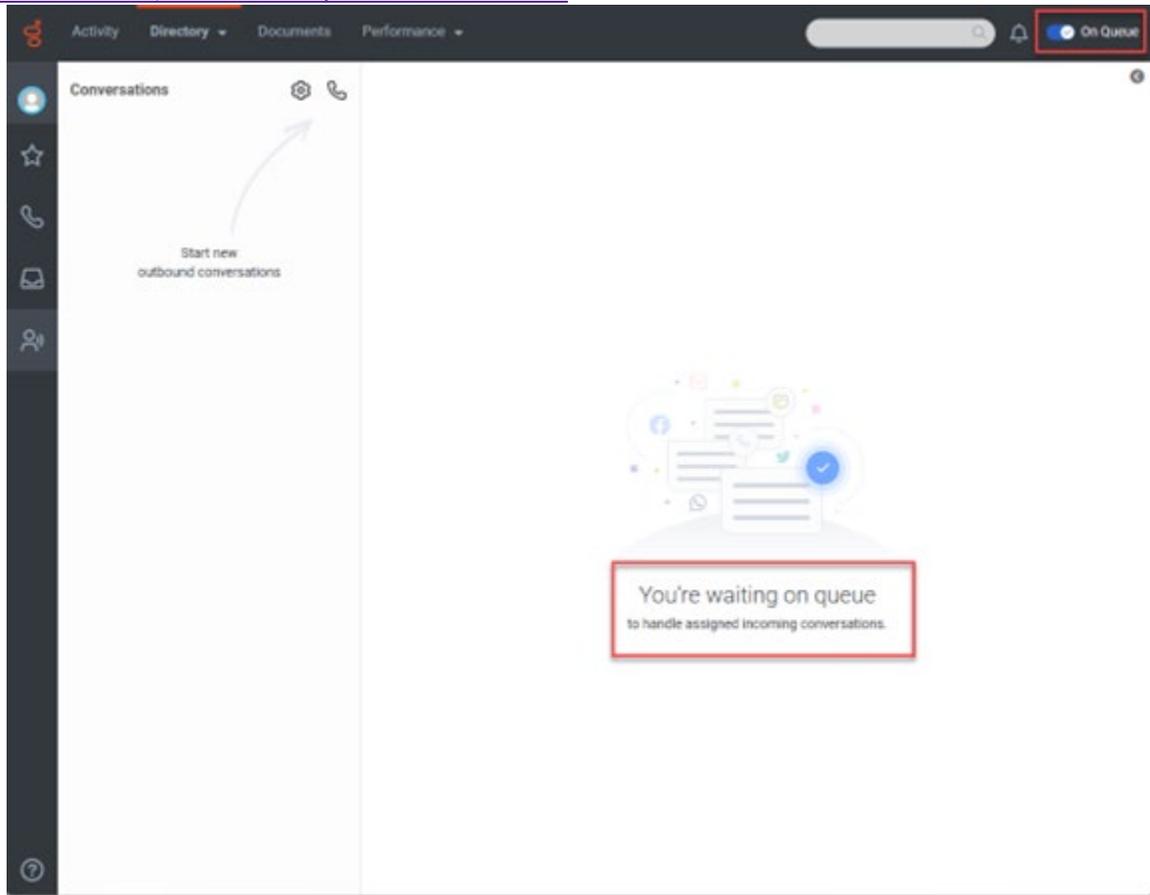


8. Once you are comfortable using the features, click on the end call button or hang up the call.

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



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



4.3 Making an External Call

4.3.1 Ending a Call

(Video instructions available: Making an External Call)

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

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

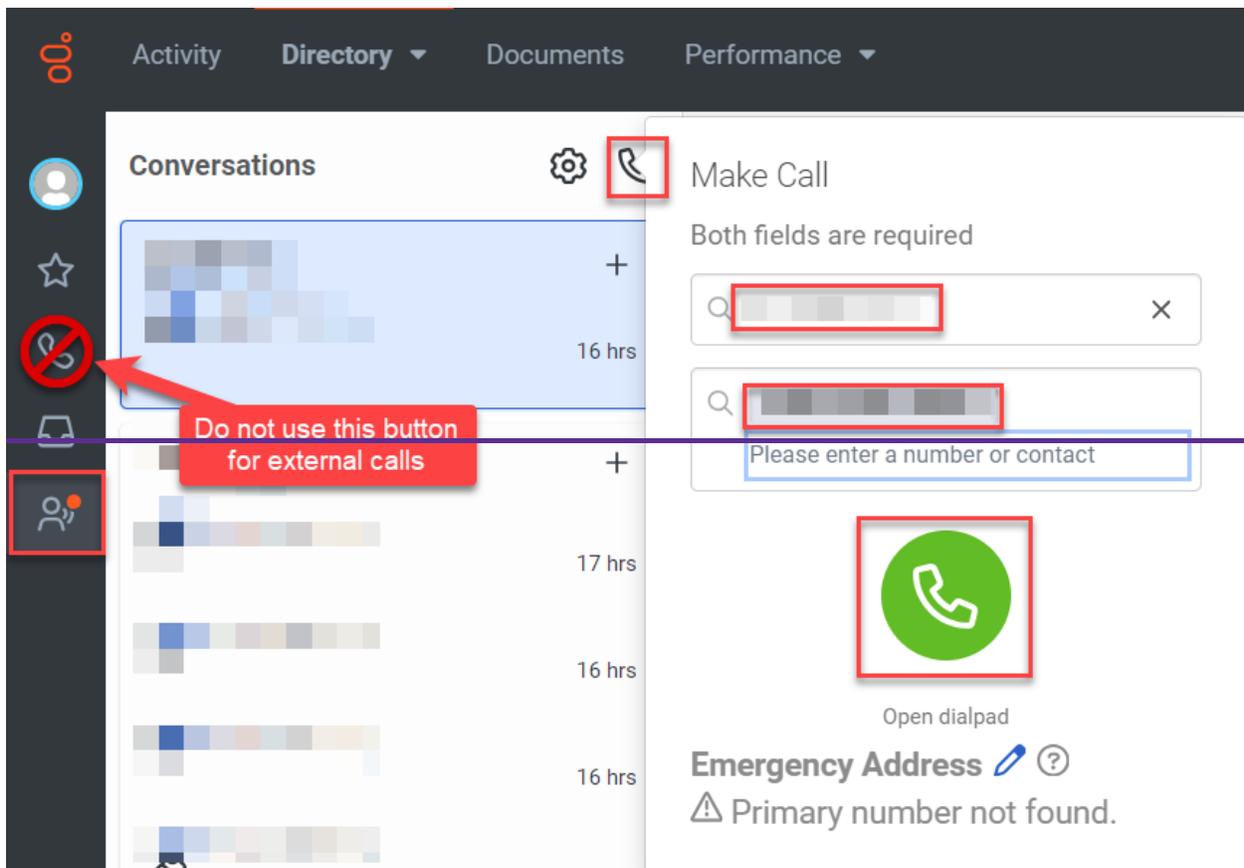
To make an external call:

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

Note Making an external call using the phone button in the Communications Sidebar on the left does the following

- o Sends your telephone number to the called party's caller ID.
- o If you are "On Queue," you may receive calls from the queue.
- o Unable to complete an automated telephonic signature.

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



Activity Directory Documents Performance Admin

Conversations

Start new outbound conversations

1

2

Make Call

Both fields are required

3 WisDHS_Training X

4 Enter a number or contact

5

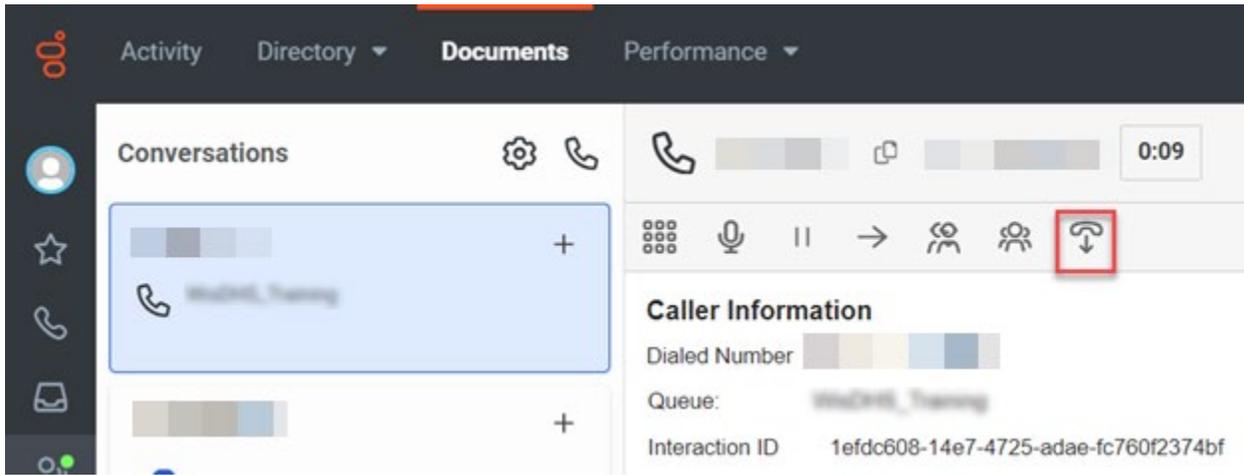
Open dialpad

Emergency Address ?

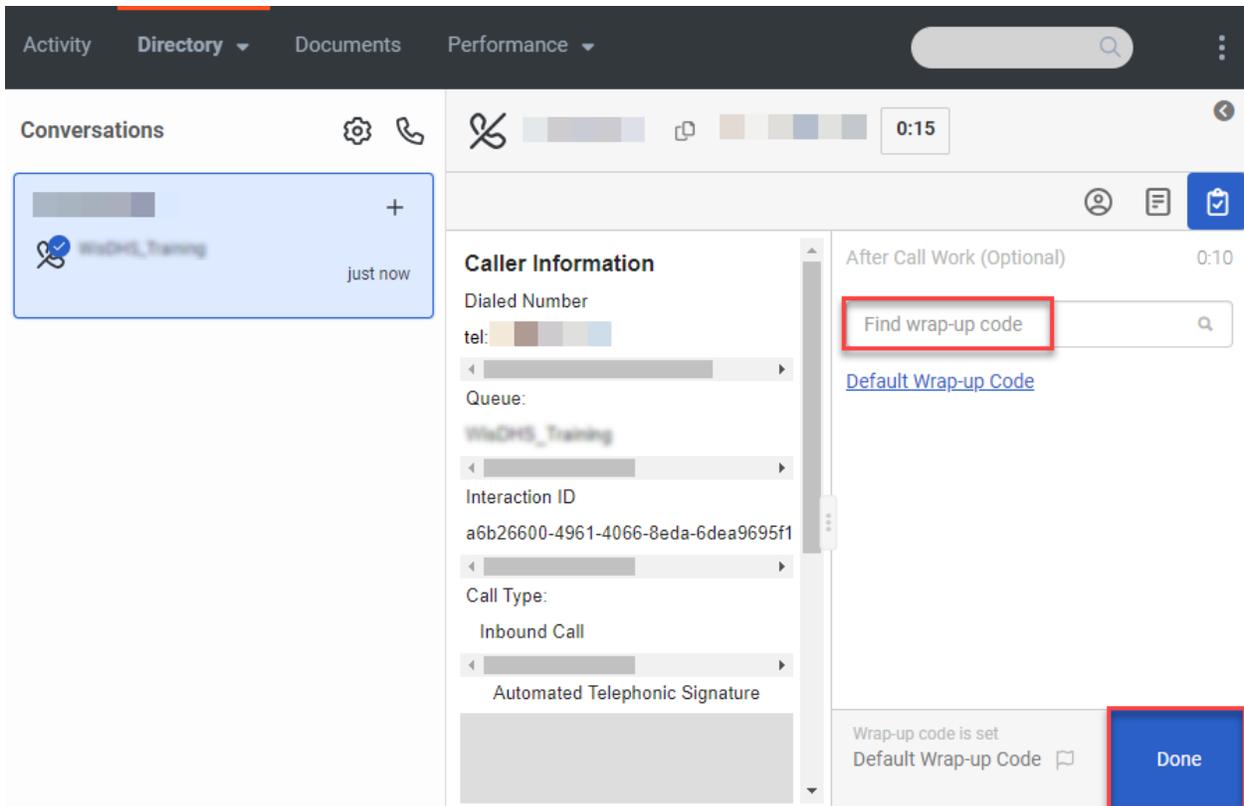
⚠ Primary number not found.

4.3.1 Ending a Call

Click the end call button to end the call.



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



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

4.5 Transferring a Call

[4.5.1 Transferring a Call](#) (Video instructions available: [Transferring a Call](#))

[4.5.2 Conference](#) (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](#)

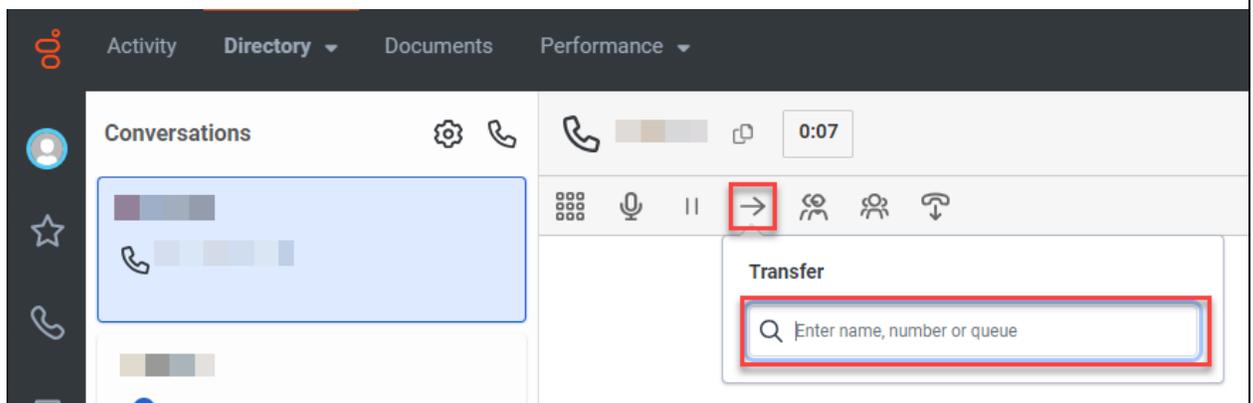
(Video instructions available: [Transferring a Call](#))

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.



4.5.1 Transferring a Call to an XFERS Genesys Queue

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

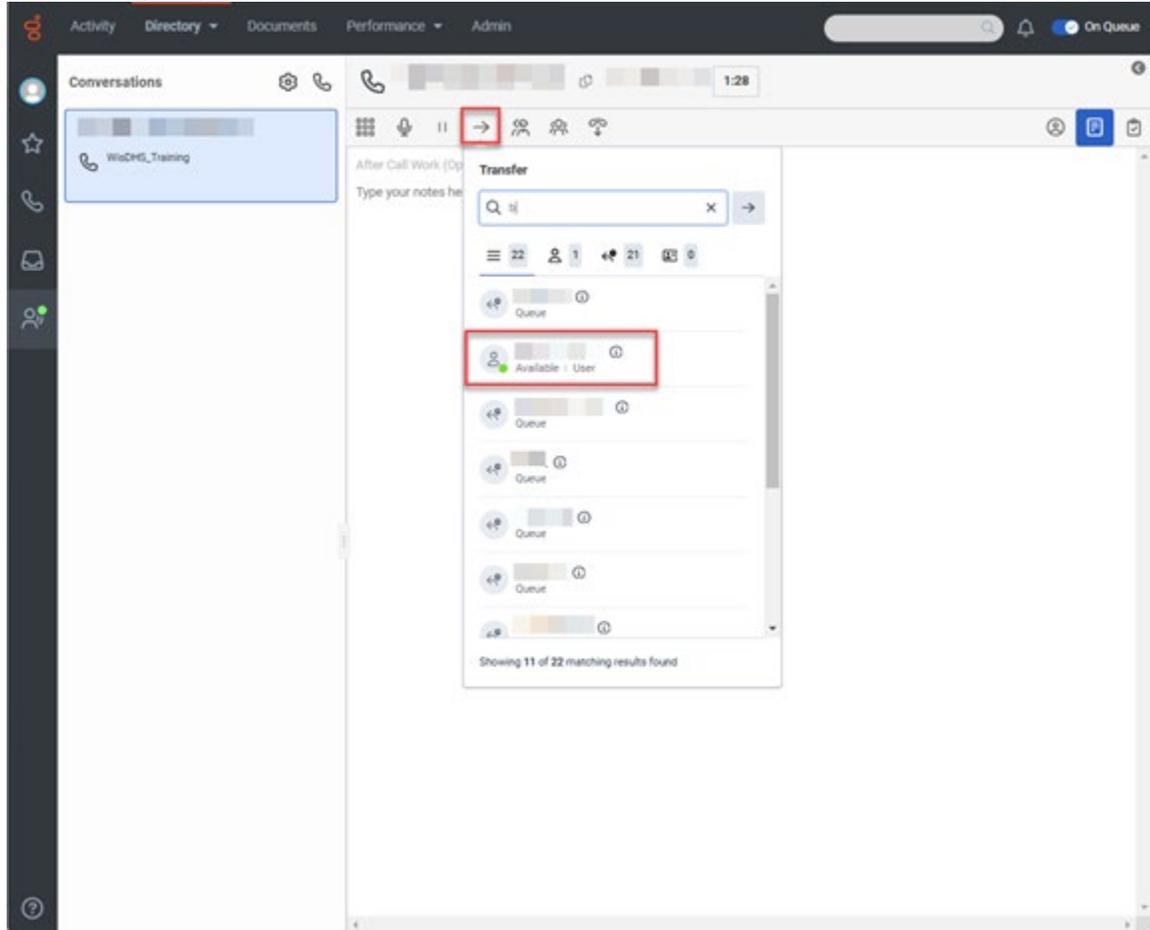
To transfer to a call to an XFERS Genesys queue:

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

4.5.2 Transferring a Call to a Genesys Agent

To transfer a Call to another Genesys agent:

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



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

Activity Directory Documents Performance Admin

Conversations  2:39

WisDHS_Training just now

Caller Information

CallerID: tel

Queue, Language: Q: WisDHS_Training, English

Interaction ID:

Dialed Number:

Call Type: Inbound Call
Automated Telephonic Signature

Language Prompt ID

Start

Pause Play Replay Previous Restart

Telephonic Signature ID Copy

End

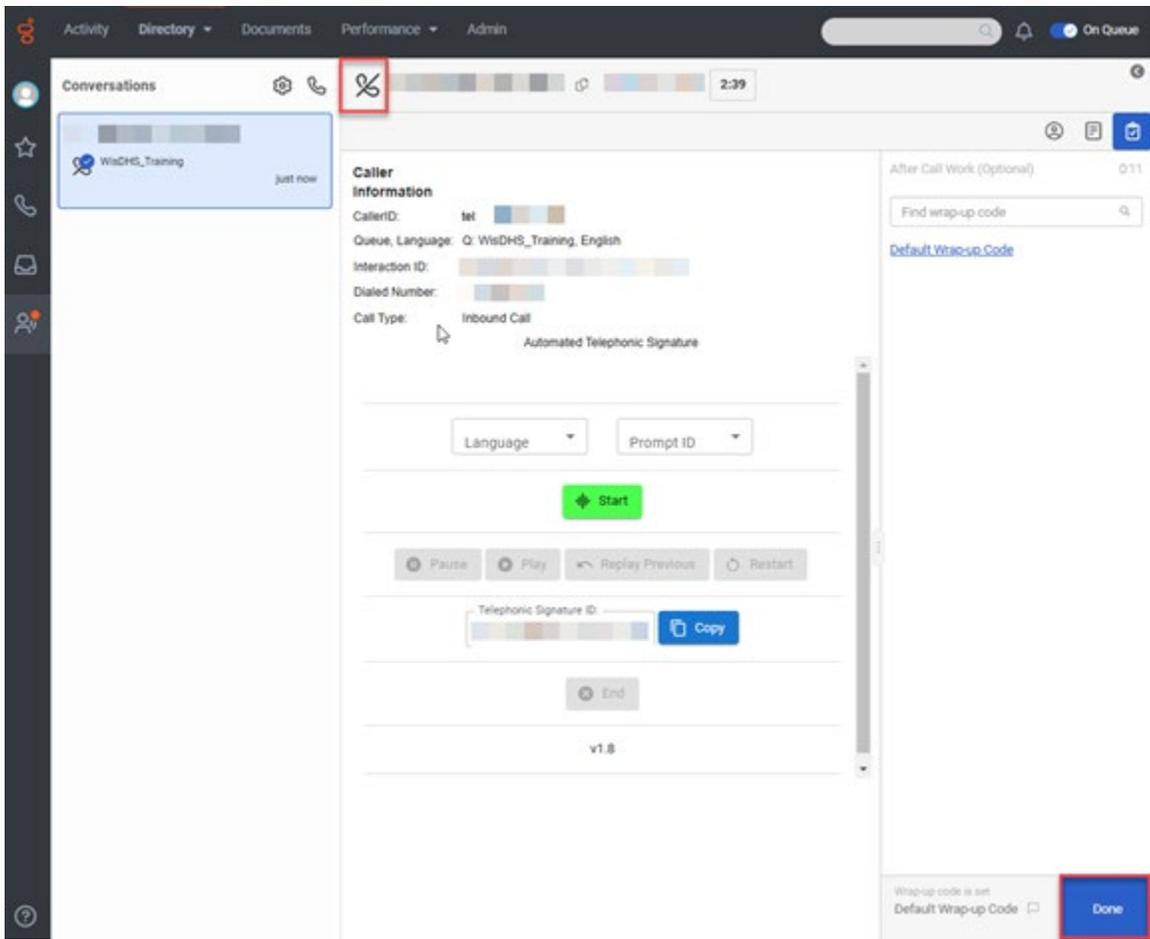
v1.8

After Call Work (Optional) 0:11

Find wrap-up code

[Default Wrap-up Code](#)

Wrap-up code is set
Default Wrap-up Code Done



4.6 Conference

[4.6.1 Start a Conference](#)

[4.6.2 Place a Conferenced Party On Hold or Remove Them From the Call](#)

(Video instructions available: [Conference](#))

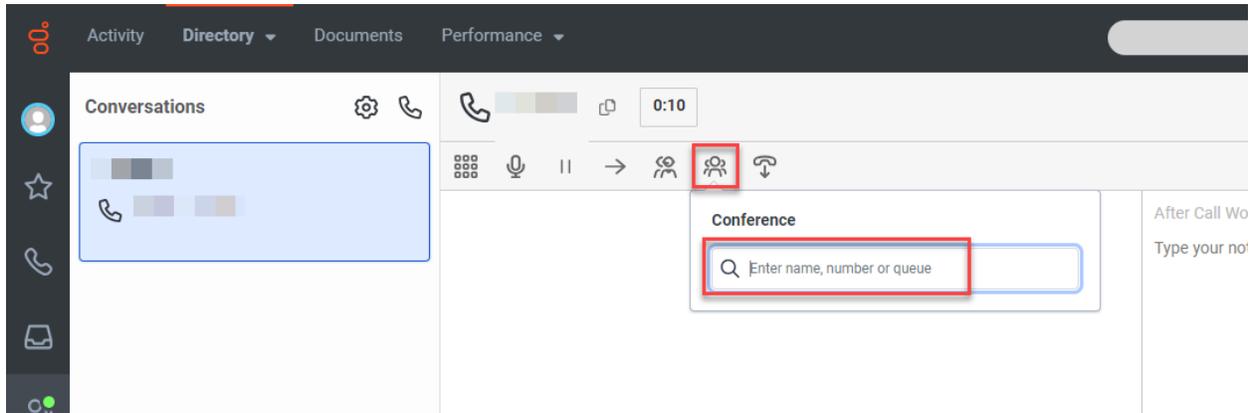
A conference adds an additional party to the call. Select the help button in the bottom left corner of the window for help text specific to this view.

4.6.1 Start a Conference

To add another party to a call:

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

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

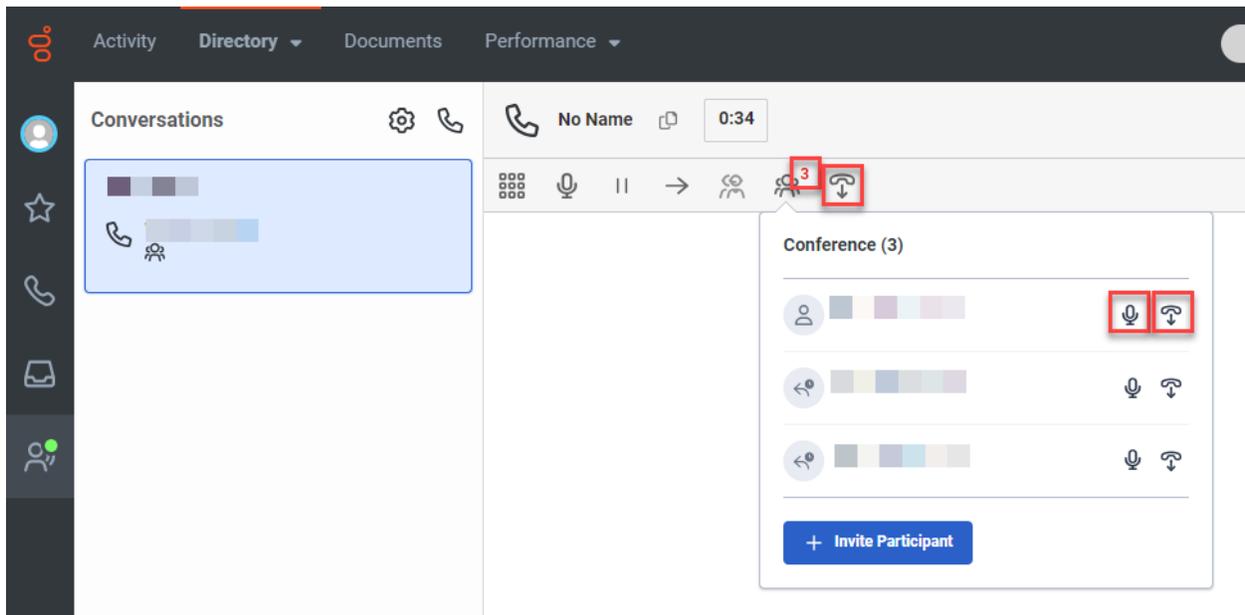


4.6.2 Place a Conferenced Party On Hold or Remove Them From the Call

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

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

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



4.7 Consult

[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](#)

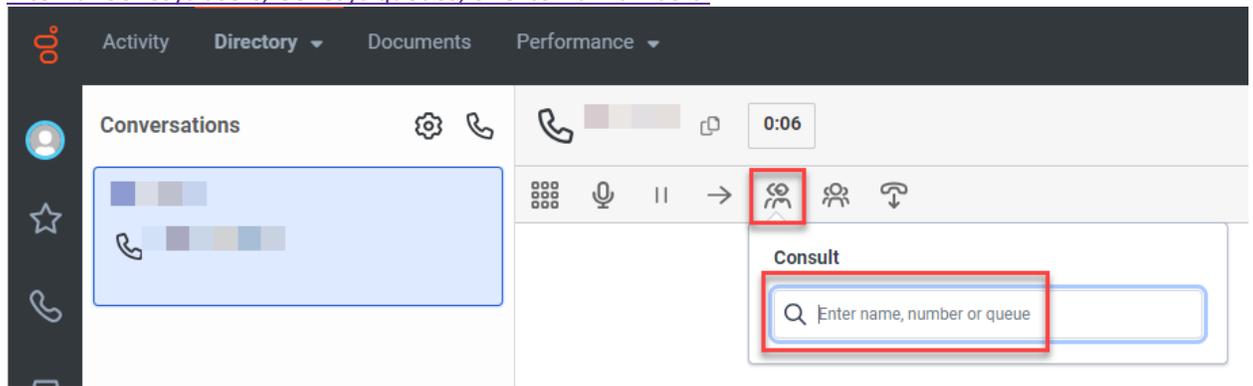
[4.7.3 Bring All Parties Together in a Conference Call](#)

(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.

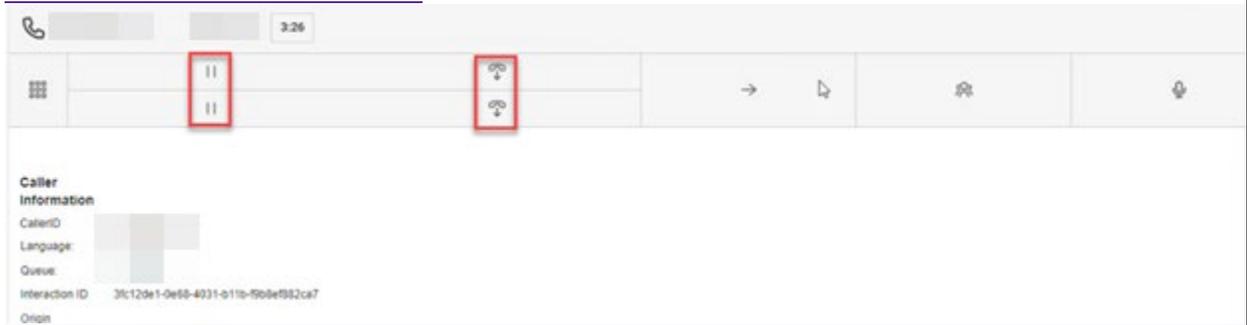
To do a consult call:

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.



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

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



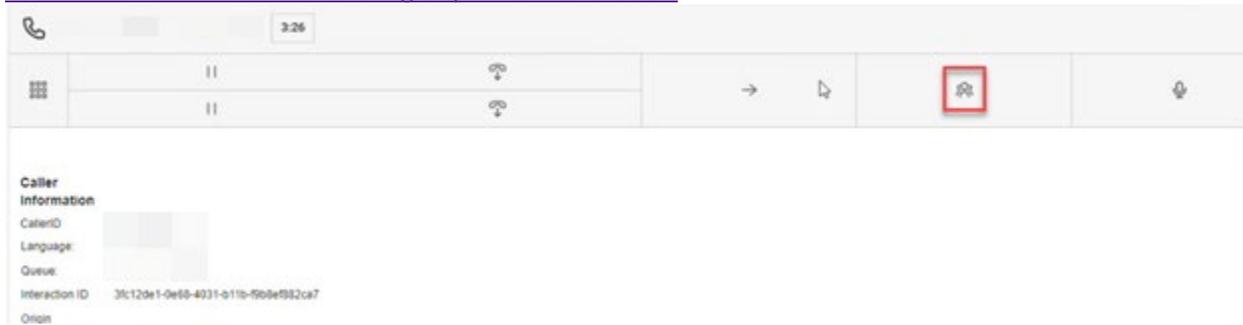
4.7.2 Transfer the Second Party to the Third Party

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



4.7.3 Bring All Parties Together in a Conference Call

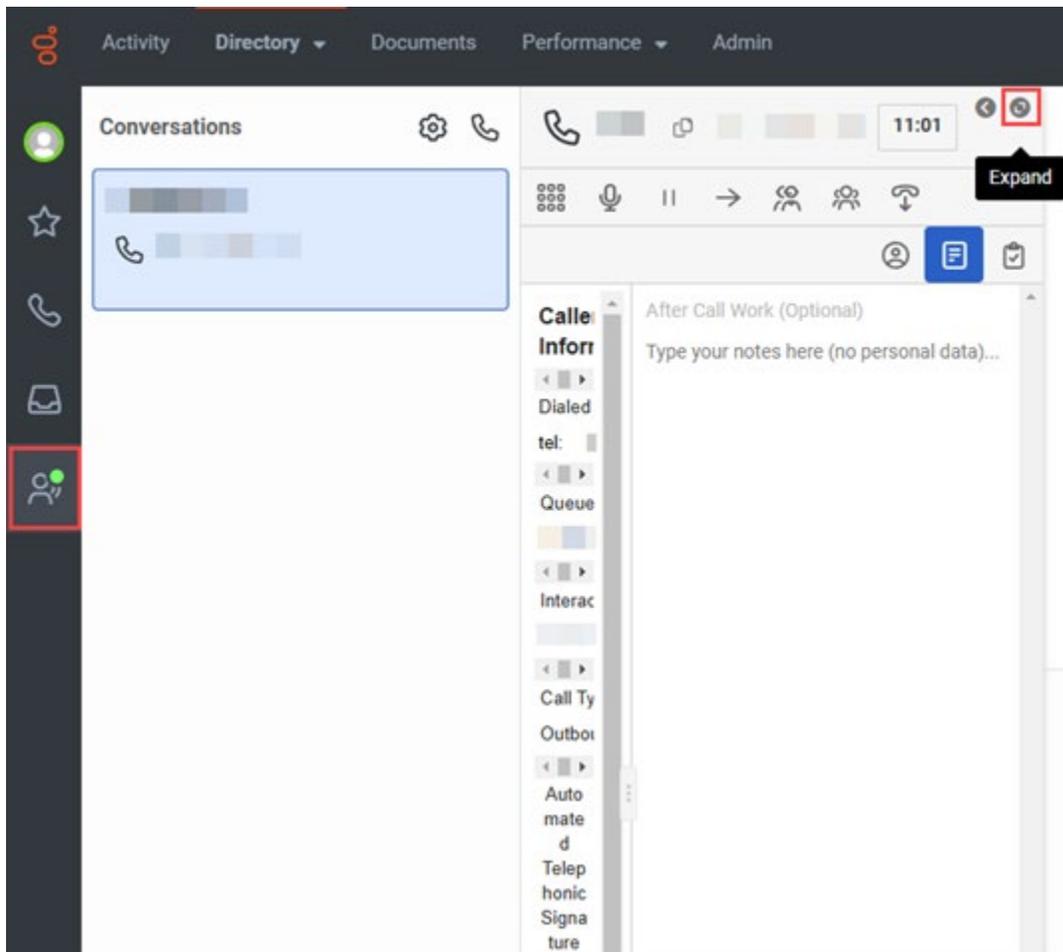
Click the conference button to bring all parties into the call.

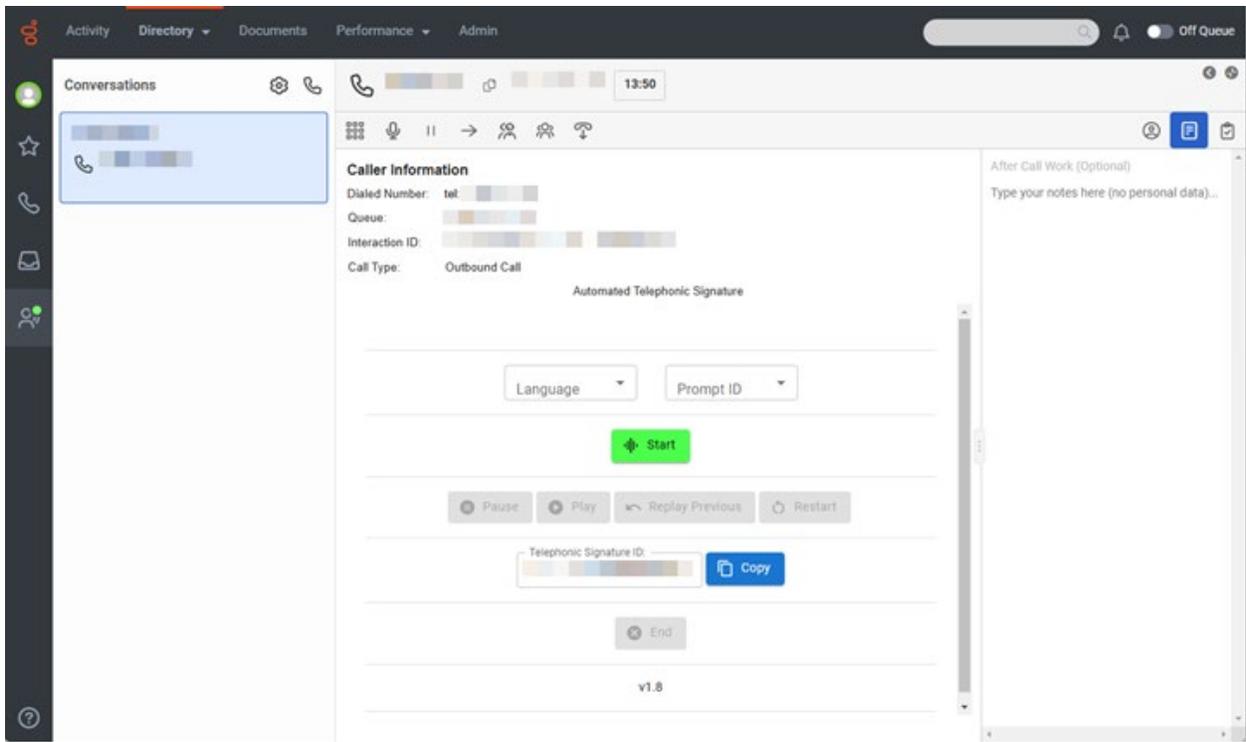


4.8 Expanding the Interactions Pane

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

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





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 Performance~~6.1 Introduction to Performance

6.1.1 Viewing Agent Performance Statistics (Video instructions available: [Viewing Agent Performance Statistics](#))

~~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](#))

~~6.1.7 Exporting or Scheduling a Report~~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: [Viewing Agent Performance Statistics](#))

~~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](#))

~~6.1.7 Exporting or Scheduling a Report~~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, [SEE SECTION 6.1 SUPERVISOR DESKTOP](#).

Viewing

Agent	Time in St...	Status	Logged In	On Queue	Idle	Not Resp...	Off Queue	Available	Away	Break	Meal
Totals for all agents											
	N/A	N/A	96 days 21h 53m 9s	14 days 7h 43m 10s	8 days 23h 14m 24s	1 day 8h 7m 57s	82 days 14h 9m 59s	82 days 10h 0m 5s	11s	56s	15s
Totals for each agent											
Agent 1	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	-	-
Agent 2	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	-	-	-
Agent 3	57 days 5h 48m 26s	Offline	-	-	-	-	-	-	-	-	-
Agent 4	1 day 4h 57m 56s	Offline	14 days 1h 11m 28s	-	-	-	14 days 1h 11m 28s	14 days 1h 11m 28s	-	-	-
Agent 5	83 days 12h 0m 50s	Offline	-	-	-	-	-	-	-	-	-
Agent 6	50 days 5h 42m 3s	Offline	-	-	-	-	-	-	-	-	-
Agent 7	6 days 1h 55m 16s	Offline	3 days 12h 54m 26s	2m 28s	2m 22s	-	3 days 12h 51m 58s	3 days 12h 51m 58s	-	-	-
Agent 8	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	-
Agent 9	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	-	-	-

6.1.2.2 View Status, Secondary Status, and Routing Status

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

Agent	Time in Status	Status	Secondary Status	Logged In	On Queue	Routing Status	Idle	Available	Away	Break	Meal	Not Responding	Off Queue
	N/A	N/A	N/A	1 day 4h 42m 56s	4h 30m 4s	N/A	3h 49m 17s	2h 2m 45s	-	3h 7m 4s	-	30m 26s	1 day 9m 52s
Agent 1	37m 36s	On Queue	On Queue	5h 21m 4s	1h 53m 41s	Idle	1h 53m 41s	25m 19s	-	3h 7m 4s	-	-	3h 27m 22s
Agent 2	17h 17m 54s	Available	Available	13h 37m 31s	-	Off Queue	13h 37m 31s	-	-	-	-	-	13h 37m 31s
Agent 3	13m 12s	On Queue	On Queue	5h 8m 56s	2h 39m 34s	Idle	1h 55m 37s	2h 29m 32s	-	-	-	30m 38s	2h 29m 32s
Agent 4	147 days 22h 0m 31s	Offline	Offline	-	-	Off Queue	-	-	-	-	-	-	-
Agent 5	9 days 0h 41m 18s	Offline	Offline	-	-	Off Queue	-	-	-	-	-	-	-
Agent 6	1h 1m 42s	Available	Available	4h 35m 20s	-	Off Queue	-	4h 35m 20s	-	-	-	-	4h 35m 20s
Agent 7	108 days 2h 26m 43s	Offline	Offline	-	-	Off Queue	-	-	-	-	-	-	-
Agent 8	208 days 22h 35m 22s	Offline	Offline	-	-	Off Queue	-	-	-	-	-	-	-

Selectable statuses for Status and Secondary Status include:

- Available
- Busy
- Away
- Break
- Meal

- [Meeting](#)
- [Training](#)
- [On Queue](#)

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

Routing Status:

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

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

Various Status Combinations

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

6.1.2.3 Add Secondary and Routing Status to the Agent Status View

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

1. Click the plus button on the right side of the workspace.
2. Select [Routing Status](#) and [Secondary Status](#).

3. Click Save.

The screenshot shows the Genesys Performance console interface. At the top, there are navigation tabs for 'Activity', 'Directory', 'Documents', and 'Performance'. Below this is a search bar and a date selector for 'May 15, 2024'. The main area displays a table of agent status data with columns: Agent, Time in Stat..., Status, Logged In, On Queue, Idle, Not Respon..., Off Queue, Available, Away, Break, and Meal. A 'Chart Unavailable' message is visible above the table. On the right side, an 'Add/Remove Column' dialog box is open, listing various columns with checkboxes. The 'Routing Status' and 'Secondary Status' checkboxes are checked and highlighted with red boxes. At the bottom right of the dialog, a 'Save' button is highlighted with a red box. The bottom of the console shows navigation arrows, a page indicator '1', and a status '1 - 17 of 17 agents'.

Agent	Time in Stat...	Status	Logged In	On Queue	Idle	Not Respon...	Off Queue	Available	Away	Break	Meal
	N/A	N/A	1 day 8h 22m 22s	8h 52m 32s	8h 38m 9s	22s	23h 29m 50s	23h 29m 50s	-	-	-
	1 day 21h 33m 44s	Offline	-	-	-	-	-	-	-	-	-
	1h 1m 16s	On Queue	1h 12m 51s	53m 54s	44m 1s	22s	18m 56s	18m 56s	-	-	-
	1 day 20h 28m 53s	Offline	-	-	-	-	-	-	-	-	-
	20h 40m 43s	Offline	-	-	-	-	-	-	-	-	-
	91 day 5 3h 39m 51s	Offline	-	-	-	-	-	-	-	-	-
	57 day 5 21h 21m 3s	Offline	-	-	-	-	-	-	-	-	-
	13 day 5 17h 34m 16s	Offline	-	-	-	-	-	-	-	-	-
	4 day 5 21h 30m 3s	Offline	-	-	-	-	-	-	-	-	-
	2h 23m 23s	Available	11h 29m 39s	7h 58m 38s	7h 54m 8s	-	3h 31m 2s	3h 31m 2s	-	-	-
	2h 32m 58s	Offline	10h 20m 25s	-	-	-	10h 20m 25s	10h 20m 25s	-	-	-
	23h 4m 30s	Offline	-	-	-	-	-	-	-	-	-
	15 day 5 5h 26m 8s	Offline	-	-	-	-	-	-	-	-	-
	89 day 5 37m 15s	Offline	-	-	-	-	-	-	-	-	-
	15 day 5 4h 46m 21s	Offline	-	-	-	-	-	-	-	-	-
	40m 34s	Available	1h 47m 29s	-	-	-	1h 47m 29s	1h 47m 29s	-	-	-
	1m 3s	Available	6h 53m 23s	-	-	-	6h 53m 23s	6h 53m 23s	-	-	-

The selected columns are added to the view.

Activity Directory Documents Performance Off Queue

Agent Status +

Performance **Statuses** Evaluations Insights Leaderboards Development

Q May 15, 2024

	Time in Status	Status	Secondary St...	Routing Status	Logged In	On Queue	Idle	Not Respond...	Off Queue	Available	Away	Break	Meal
	N/A	N/A	N/A	N/A	1 day 8h 56m 39s	9h 2m 41s	8h 48m 17s	22s	23h 53m 58s	23h 53m 58s	-	-	-
Chart Unavailable Select a column in the summary row													
Agent	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 0s	Offline	Offline	Off Queue	-	-	-	-	-	-	-	-	-
	1h 4m 31s	On Queue	On Queue	Idle	1h 22m 59s	1h 4m 3s	54m 9s	22s	18m 56s	18m 56s	-	-	-
	1 day 20h 32m 9s	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 41m 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	-	-	-
	1h 4m 10s	Offline	Offline	Off Queue	20h 25s	-	-	-	20h 25s	20h 25s	-	-	-

1

1 - 17 of 17 agents

6.1.7 Exporting or Scheduling a Report

6.1.7.1 Export a Report

6.1.7.2 Schedule a Report

(Video instructions available: [Exporting Reports](#))

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

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

6.1.7.1 Export a Report

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

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

The screenshot displays the Genesys Performance dashboard. The main table shows agent status for April 2024. The 'Export' panel is open on the right side, allowing users to configure the report export.

Agent	Time In Stat...	Status	Logged In	On Queue	Idle	Not Respon...	Off Queue	Available	Away	Break	Meal
N/A	N/A		96 days 20h 25m 53s	14 days 7h 24m 56s	8 days 22h 56m 30s	1 day 8h 7m 57s	82 days 13h 0m 57s	82 days 8h 51m 3s	11s	56s	15s
Chart Unavailable Select a column in the summary row											
Agent	Time In Stat...	Status	Logged In	On Queue	Idle	Not Respon...	Off Queue	Available	Away	Break	Meal
Ji	6h 36m 36s	Offline	14 days 1h 11m 28s	-	-	-	14 days 1h 11m 28s	14 days 1h 11m 28s	-	-	-
Hj	100 days 8h 29m 10s	Offline	-	-	-	-	-	-	-	-	-
jk	1 day 5h 23m 41s	Offline	-	-	-	-	-	-	-	-	-
Ki	22 days 22h 23m 36s	Offline	3 days 12h 54m 26s	2m 28s	2m 22s	-	3 days 12h 51m 58s	3 days 12h 51m 58s	-	-	-
Kk	1h 20m 5s	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	-
M	2h 52m 19s	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	-	-	-
M	6h 49m 53s	Offline	1 day 18h 10m 13s	3h 32m 36s	38m 57s	37s	1 day 14h 37m 38s	1 day 14h 37m 38s	-	-	-
Pl	1 day 1h 33m 31s	Offline	10 days 11h 41m 45s	2 days 3h 3m 15s	1 day 15h 11m 0s	6h 12m 45s	8 days 8h 38m 31s	8 days 6h 35m 12s	2s	0.182s	12s
Ri	14h 35m 56s	Offline	6h 29m 9s	-	-	-	6h 29m 9s	6h 29m 9s	-	-	-
Ri	98 days 5h 26m 35s	Offline	-	-	-	-	-	-	-	-	-
Ri	2 days 9h 35m 41s	Offline	1h 51m 40s	57m 1s	38m 34s	42s	54m 40s	54m 40s	-	-	-
Ri	9h 24m 2s	Available	6 days 19h 48m 6s	2 days 5h 29m 26s	13h 50m 10s	15m 39s	4 days 14h 18m 40s	4 days 12h 34m 52s	5s	3s	3s
Ri	2h 40m 43s	Offline	16 days 10h 31m 22s	4 days 20h 44m 32s	3 days 16h 17m 46s	1 day 1h 34m 53s	11 days 13h 46m 50s	11 days 13h 46m 50s	-	-	-
Si	9 days 8h 52m 16s	Offline	3 days 16h 59m 40s	5m 22s	2m 25s	-	3 days 16h 54m 18s	3 days 16h 54m 18s	-	-	-

The 'Export' panel on the right includes the following fields and options:

- Export Name:** 2024-05-24 Agent Status Summary
- Options:**
 - Agent Log In - Log Out Details
 - Agent Status Timeline Details
 - Agent Status Duration Details
- Recipients:** Enter up to 10 email addresses
- Format:** CSV
- Include all columns
- Schedule:** (Dropdown menu)
- Formatting:** (Dropdown menu)
- Buttons:** Export, Cancel

2. Optionally, enter a name [for](#) the exported file or accept the default.

Export [X]

Export Name *

2024-05-24 Agent Status Summary [X]

Displays only for agent status reports

3

Agent Log In - Log Out Details ⓘ

Agent Status Timeline Details ⓘ

Agent Status Duration Details ⓘ

Recipients

Enter up to 10 email addresses

Format

CSV [v]

Include all columns

Schedule [v]

Formatting [v]

3. For agent status reports only, choose the information to be included:

1. Agent login and logout activity
2. Details of agent status changes
3. Agent time spent in each status

4. Optionally, enter [the email addresses of](#) up to 10 email addresses that [will are to](#) receive the report in addition to your Genesys inbox.
5. Select [whether if](#) the report [will is to](#) be a comma separated value (CSV) file that can be displayed in Excel or a PDF file.
6. Check the Include all columns box to include all columns that can be displayed in the view. Leave it unchecked to include only the currently displayed columns.
7. Schedule future delivery of reports. By default, the current view with current information is sent once. [See Schedule a Report](#)[See Schedule a Report](#) to set up future one-time or recurring reports.

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



The screenshot shows a 'Formatting' panel with the following settings:

- Duration Format:** A dropdown menu is open, showing options: 'Milliseconds' (crossed out with a red X), 'Milliseconds' (highlighted in blue), 'Seconds', 'HH:MM:SS' (highlighted with a red box), and 'H:M:S'.
- Language:** A dropdown menu set to 'English (US)'.
- Delimiter:** A dropdown menu set to 'Comma (,)'.
- Include Summary Row
- Exclude Empty Rows

9. Click Export_ to send the report.

[6.1.7.2 Schedule a Report](#)

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

1. Select Recurring to display future scheduling options.

Schedule ^

Frequency

Run Once Recurring

[View existing export schedules](#)

Time period

Last week v

Recurrence

Weekly v

Day of week

Monday v

Request Time

8:00 AM ⌚

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 the seven days prior to the delivery date.
3. Select the recurrence to specify how often future reports will be sent.
4. Select the day of the week for report delivery.
5. Select the time of day for report delivery.
6. Set the time format as shown in Step 8, above. [SECTION 6.1.7.1 EXPORT A REPORT, STEP 8.](#)
7. Click Export- to start the schedule.

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

Opening export schedules from the Export pane:

Schedule ^

Frequency

Run Once Recurring

[View existing export schedules](#)

Formatting v

Opening export schedules from a new tab:

The screenshot shows a web application interface with a dark top navigation bar containing 'Activity', 'Directory', 'Documents', 'Performance', and 'Admin'. Below this is a browser window with a 'New Tab' and a search bar. The main content area is divided into a left sidebar and a main panel. The sidebar has sections for 'Default', 'Employee Engagement', 'My Performance', and 'Other'. The 'Other' section contains 'Alert Rules' and 'Scheduled Exports', which is highlighted with a red box. The main panel has a 'Saved' section with a search bar and a table of saved views.

Name	Base	Time Period	Time Zone	Entities	Entity Count
Agent Group Performance	Agent Performance	Base	None	-	3
Test	My Interactions	None	-	-	0

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

Activity Directory Documents Performance Admin

Scheduled Exp... +

Scheduled Exports

Base	Name	Schedule	Time Zone	Time Period	Destination	Enabled	Auto disable in	Granularity
Agent Status	2024-05-25 Agent Status Summary	Every Monday at 8:00 AM	Chicago (UTC-05:00)	Last week		Yes	88 days	
Run date		Status						
Jun 3, 2024 8:00 AM		Completed						
May 27, 2024 8:01 AM		Completed						

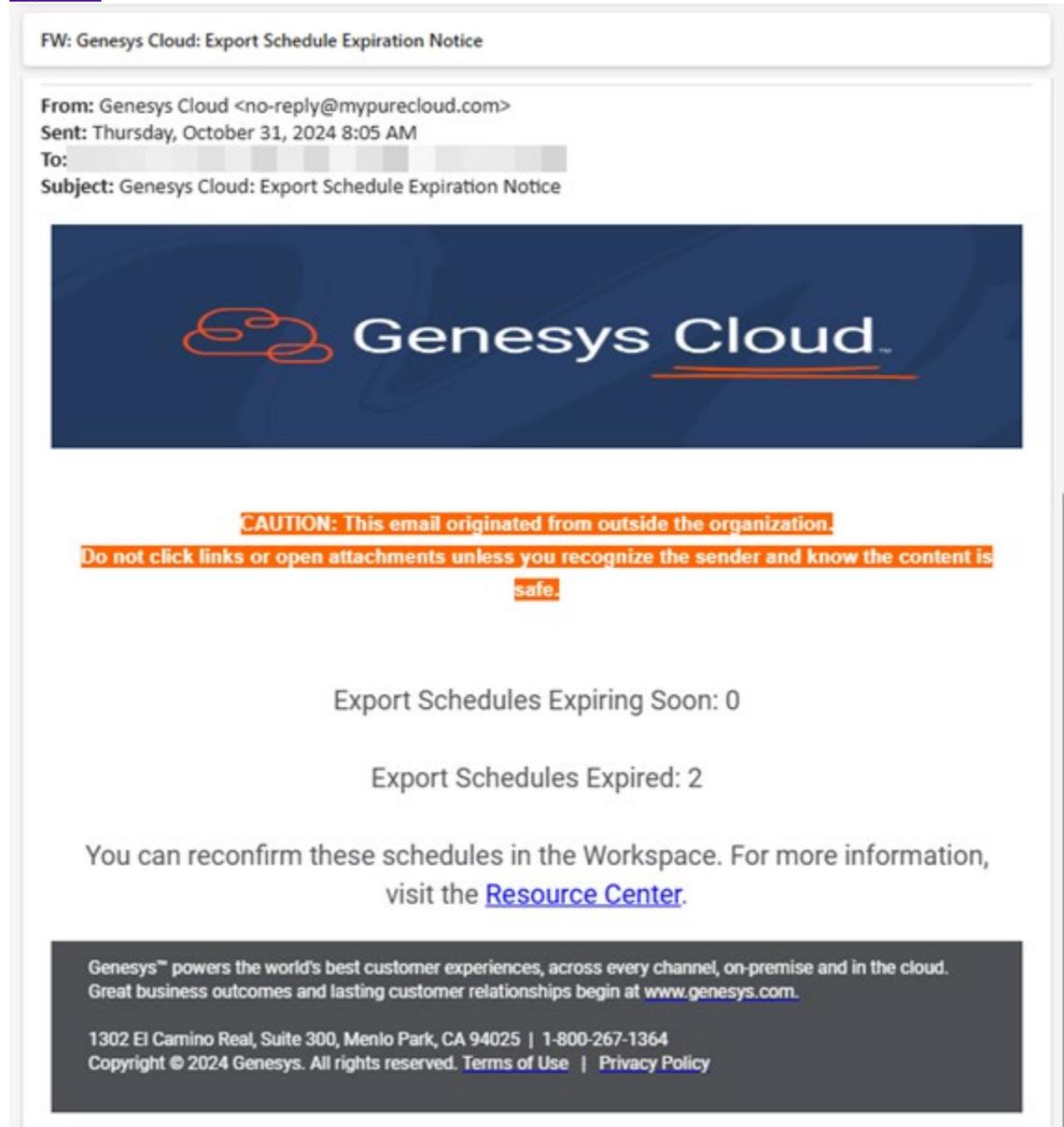
1 - 1 of 1 export schedules

Enable/Disable Schedule
Run Now
Edit Schedule
Renew Schedule
Delete Schedule

6.1.8 Expiring Reports

6.1.8.1 Renewing Reports

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

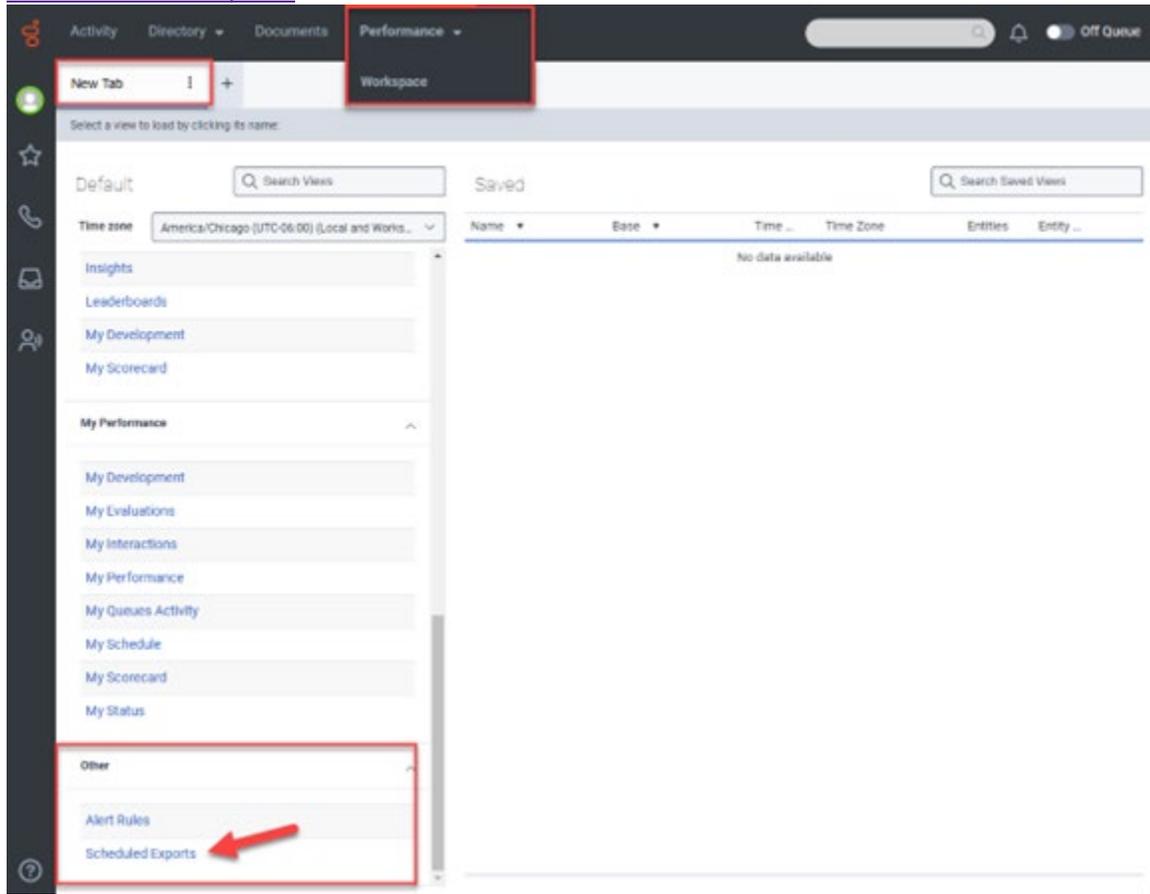


6.1.8.1 Renewing Reports

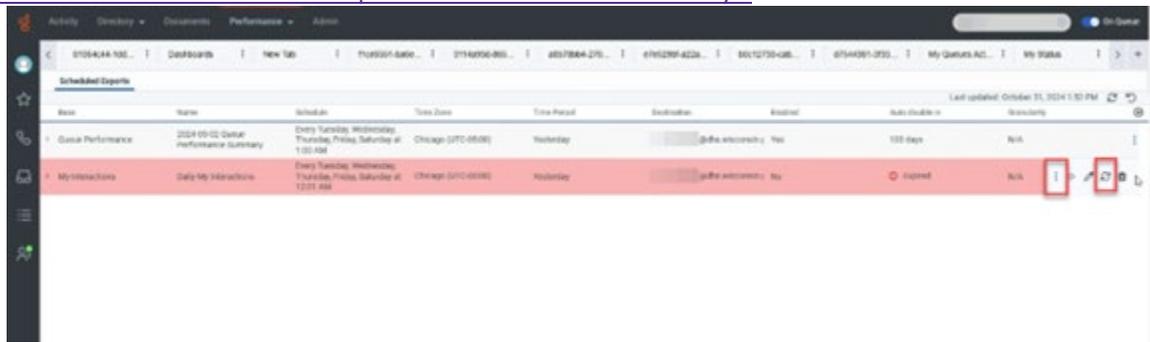
(Video instructions available: [Renewing Reports](#))

[To renew expiring or expired reports:](#)

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



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



Note

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



7 Local Administrator

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

~~7.2 Setting System Business Events – Meetings~~ 7.2 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 Queues~~ 7.5 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).

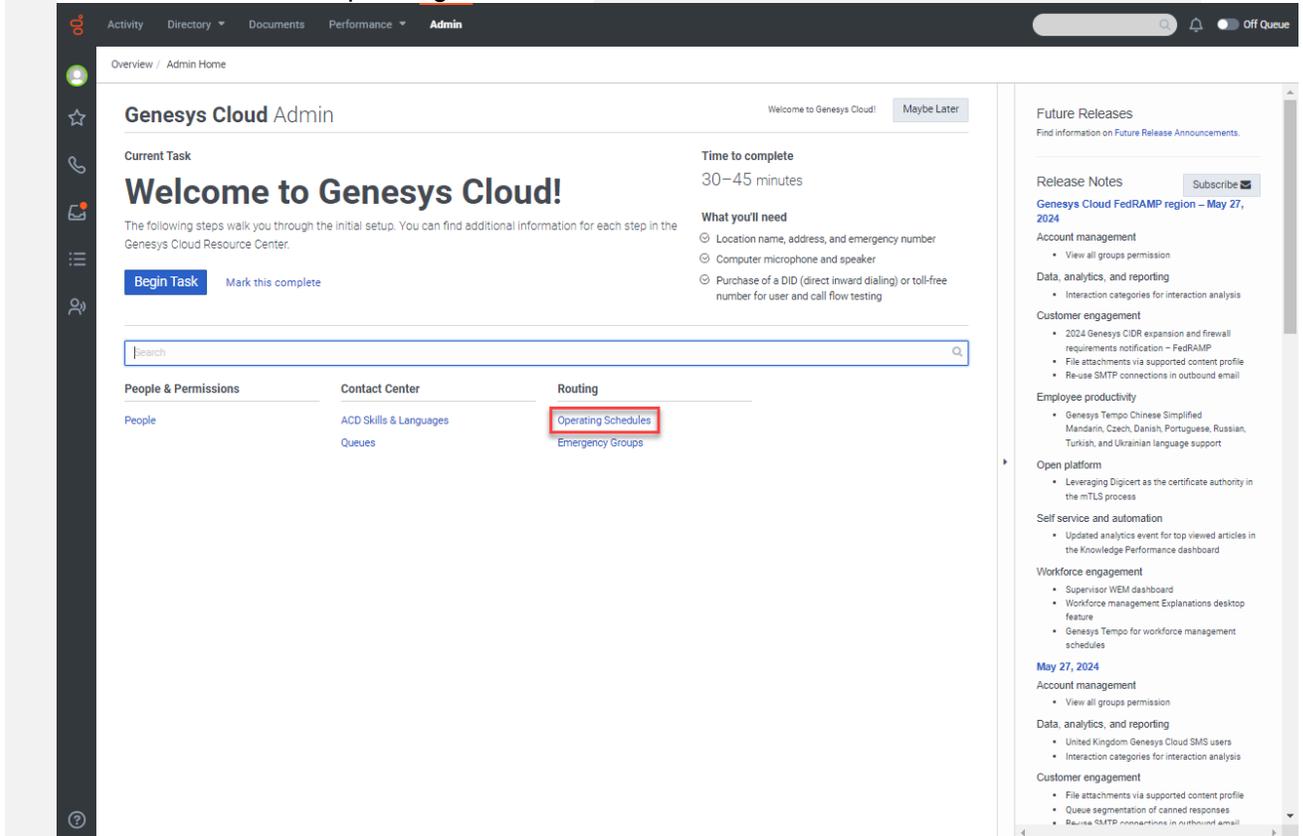
[Scheduling a Meeting Business Event](#)

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: dhsgenesyscloudproject@dhs.wisconsin.gov, to confirm which prompt is currently loaded (do not open a ticket) Do not open a Genesys Support ticket unless a new prompt is required.

1. On the Admin tab click Operating Schedules.



The screenshot displays the Genesys Cloud Admin dashboard. The top navigation bar includes 'Activity', 'Directory', 'Documents', 'Performance', and 'Admin'. The main content area features a 'Welcome to Genesys Cloud!' message with a 'Begin Task' button and a 'Time to complete' of 30-45 minutes. Below this, there is a search bar and a navigation menu with three main sections: 'People & Permissions', 'Contact Center', and 'Routing'. The 'Routing' section is expanded, showing 'Operating Schedules' and 'Emergency Groups'. The 'Operating Schedules' link is highlighted with a red box. On the right side, there is a 'Future Releases' section with a 'Subscribe' button and a list of release notes for May 27, 2024.

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

Activity Directory Documents Performance Admin

Routing / Operating Schedules

Operating Schedules Schedule Groups Schedules

Emergency Groups

Usages Copy Customize Add

<input type="checkbox"/>	Name	Open	Closed	Holiday	Time Zone
<input type="checkbox"/>	Home_Meeting_Schedule	0500-2200 M-F	Home_Meeting_1, Home_Meeting_2	-	America/Chicago
<input type="checkbox"/>	Home_Schedule_Group	0500-2200 M-F	-	2024 Christmas Eve (State Holiday), 2024 D...	America/Chicago

1 - 2 of 2 25 per page

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

Activity Directory Documents Performance Admin

Routing / Operating Schedules

Operating Schedules Schedule Groups Schedules

Emergency Groups

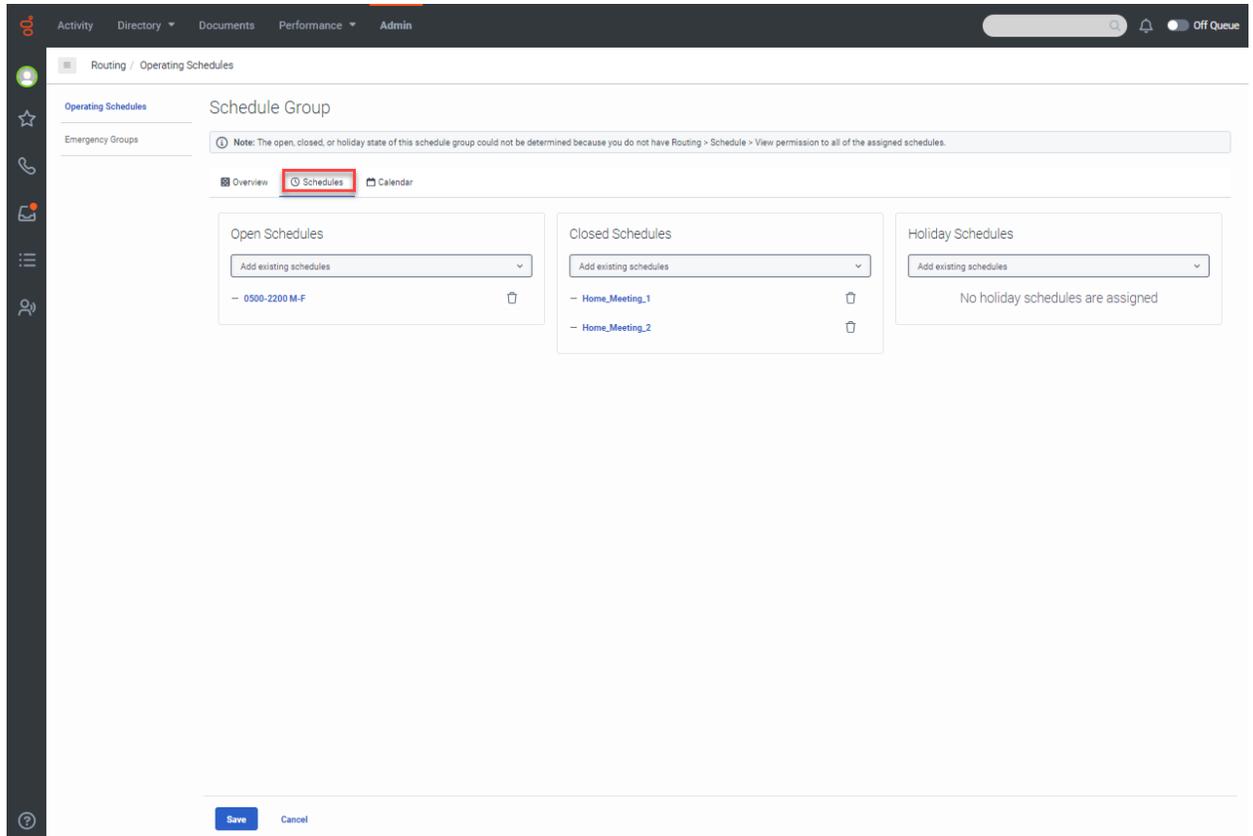
Usages Copy Customize Add

<input type="checkbox"/>	Name	Open	Closed	Holiday	Time Zone
<input type="checkbox"/>	Home_Meeting_Schedule	0500-2200 M-F	Home_Meeting_1, Home_Meeting_2	-	America/Chicago
<input type="checkbox"/>	Home_Schedule_Group	0500-2200 M-F	-	2024 Christmas Eve (State Holiday), 2024 D...	America/Chicago

1 - 2 of 2 25 per page

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

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



5. If no business meeting is listed, click the drop-down menu and select *your line of business_Meeting_1* and *your line of business_Meeting_2* for your line of business.

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

The screenshot shows a web application interface for "Routing / Operating Schedules". The main content area is titled "Schedule Group" and contains a note: "Note: The open, closed, or holiday state of this schedule group could not be determined because you do not have Routing > Schedule > View permission to all of the assigned schedules." Below the note are three sections: "Open Schedules", "Closed Schedules", and "Holiday Schedules".

- Open Schedules:** Contains a dropdown menu with "Add existing schedules" and a list item "- 0500-2200 M-F".
- Closed Schedules:** Contains a dropdown menu with "Add existing schedules" and a list item "- CE43Meeting_1".
- Holiday Schedules:** Contains a dropdown menu with "Add existing schedules" and the text "No holiday schedules are assigned".

A modal window for "CE43Meeting_1" is open, showing the following details:

- Title: CE43Meeting_1
- Status: This schedule is not currently active in America/Chicago.
- Occurs: Friday, March 29, 2024 from 1:55 PM to 5:00 PM
- Action: A pencil icon (edit button) is visible at the bottom left of the modal.

At the bottom of the interface, there are "Save" and "Cancel" buttons.

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

The screenshot shows a web interface for configuring a schedule. The main content area is titled "Schedule" and is divided into several sections:

- Schedule Details:** Includes a "Name" field with the value "CE43Meeting_1" and a "Division" dropdown menu set to "Home". A note below states: "Only people with Routing > Schedule > View permission in this division can use this schedule."
- When does the schedule first occur and repeat?:** This section contains a date and time selector. A red box highlights the date "03/29/2024", the time "1:55 PM", and the "All day" checkbox. Below this is a checkbox for "This occurrence spans multiple days" which is currently unchecked.
- How often does this schedule repeat?:** A dropdown menu is set to "Never (a one-time event)".
- Occurs:** A summary box showing "Friday, March 29, 2024 from 1:55 PM to 5:00 PM".
- Upcoming Occurrences:** A calendar view showing "No upcoming occurrences" with navigation arrows.
- Usages:** A section titled "This schedule is referenced on the following items." with two dropdown menus: "Schedule Groups" (set to 0) and "Architect Flows".

At the bottom of the form, there are "Save" and "Cancel" buttons.

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.

How often does this schedule repeat?

Weekly

When does this schedule occur during the week?

Days

Every week(s)

When does this schedule stop repeating?

Never

On End of day Fixed (UTC)

After Occurrences

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

The screenshot shows the 'Schedule' configuration page. The 'Upcoming Occurrences' section is highlighted with a red box, indicating the button to click. The page includes the following sections:

- Schedule Details:** Name (CE43Meeting_1), Division (Home), and a note: "Only people with Routing > Schedule > View permission in this division can use this schedule."
- Occurs:** Friday, March 29, 2024 from 1:55 PM to 5:00 PM
- Upcoming Occurrences:** A section with a calendar icon and the text "No upcoming occurrences".
- Usages:** A section showing "This schedule is referenced on the following items." with a list of "Schedule Groups" (0) and "Architect Flows".

The screenshot shows the 'Schedule' configuration page with a calendar popup open. The calendar displays the following data:

	Mon 5/27	Tue 5/28	Wed 5/29	Thu 5/30	Fri 5/31	Sat 6/1	Sun 6/2
1pm							
2pm					1:55 - 5:00 CE43Meeting_1		
3pm							
4pm							
5pm							
6pm							
7pm							
8pm							

10. Click Save.

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

7.2.2 Creating Multiple Meeting Business Event Schedules

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

7.2.3 Cancelling a Business Event Schedule

To cancel a scheduled meeting business event:

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

Note The meeting business event can be rescheduled, [SEE SCHEDULING A MEETING BUSINESS EVENT](#)

7.5 Agent Accounts

7.5.1 Requesting Access for a New Agent

[7.5.1 Requesting Access for a New Agent](#)

[Access to Genesys Cloud CX for new agents are created by the Genesys Cloud Support team.](#)

[To request access for a new agent:](#)

1. [Complete the Genesys Cloud CX Provisioning Sheet.](#)

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

2. [The supervisor or local administrator emails the completed document to: \[helpdesk@wi.gov\]\(mailto:helpdesk@wi.gov\). For instructions on opening a ticket see Section 11.1.2 opening a ticket.](#)

[After the agent has been added the agent receives a Welcome to Genesys Cloud email informing them their access has been granted.](#)

~~7.5~~7.6 Assigning Queues

[7.6.1 Assign or Unassign a User From a Queue](#)

(Video instructions available: [Assigning Queues](#))

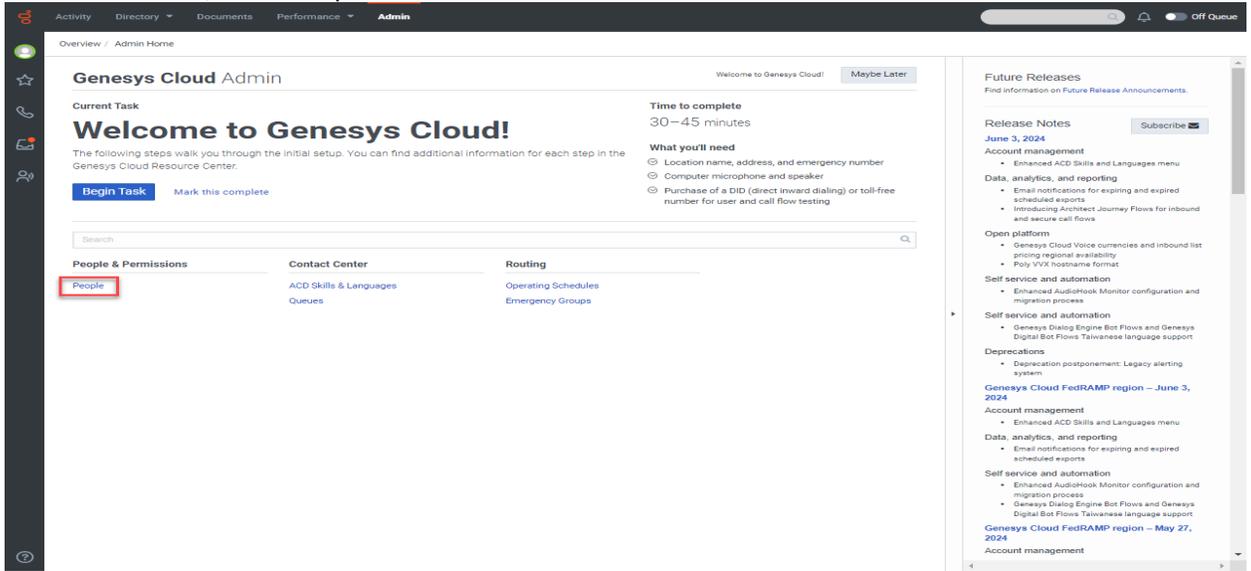
Note Agents must be assigned their spoken language(s) using the steps in section [7.5 ASSIGNING LANGUAGES](#) [7.7 ASSIGNING LANGUAGES](#) before they can be assigned to a queue or queues.

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

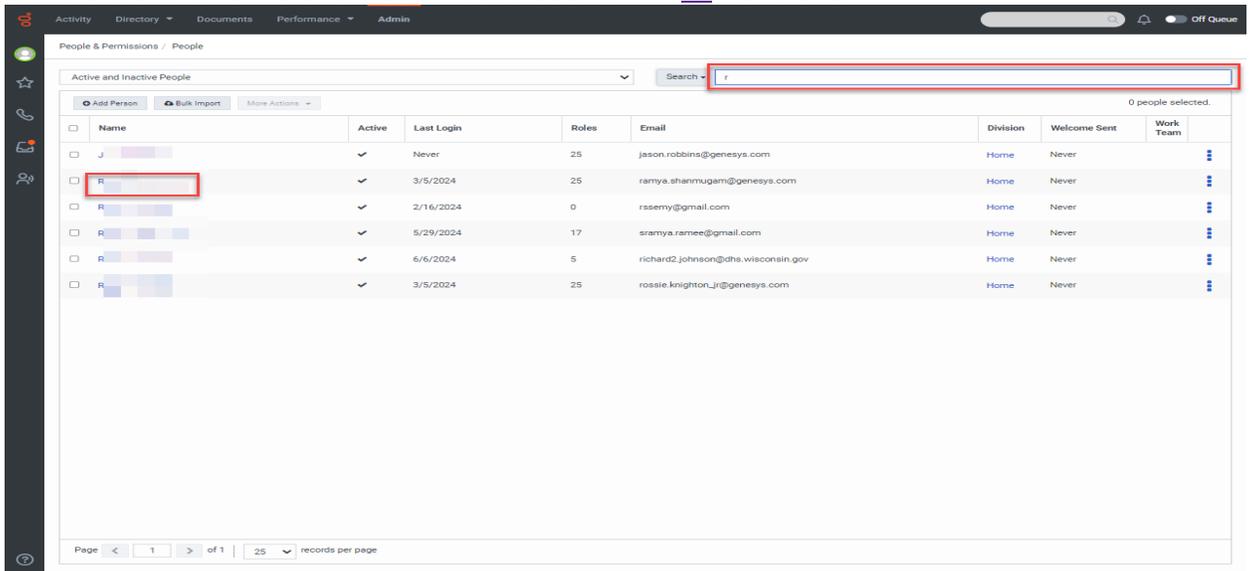
7.6.1 Assign or Unassign a User from a Queue

To assign a user to a Queue:

1. On the Admin tab, select People.



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



3. Select the Queues tab.

The screenshot shows the 'Assigning Queues' interface. The 'Queues' tab is highlighted with a red box. Below the tab is a search bar and a table of queues. The table has two columns: 'Name' and 'Assigned'. The 'Assigned' column contains checkboxes. The 'CE43_Q1_VM' row is selected. At the bottom of the table, there is a pagination control showing 'Page 1 of 2' and '25 records per page'. Below the table are three buttons: 'Save', 'Save & Continue', and 'Cancel'. A 'Delete Person' link is visible in the bottom right corner.

Name	Assigned
CE43_Q1	<input checked="" type="checkbox"/>
CE43_Q1_VM	<input checked="" type="checkbox"/>
ChildCare_Crawford_County_VM	<input checked="" type="checkbox"/>
ChildCare_Grant_County_VM	<input checked="" type="checkbox"/>
ChildCare_Green_County_VM	<input checked="" type="checkbox"/>
ChildCare_Iowa_County_VM	<input checked="" type="checkbox"/>
ChildCare_Jefferson_County_VM	<input checked="" type="checkbox"/>
ChildCare_LaFayette_County_VM	<input checked="" type="checkbox"/>
Southern_CC_Crawford	<input type="checkbox"/>
Southern_CC_Grant	<input type="checkbox"/>
Southern_CC_Green	<input type="checkbox"/>
Southern_CC_Iowa	<input type="checkbox"/>
Southern_CC_Jefferson	<input type="checkbox"/>
Southern_CC_Rock	<input type="checkbox"/>
Southern_EBD	<input type="checkbox"/>

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.

Activity Directory Documents Performance Admin

People & Permissions / People

Division & Licenses ACD Skills Queues Person Details

Assigning Queues

Search for a queue

Name	Assigned
CE43_Q1	<input checked="" type="checkbox"/>
CE43_Q1_VM	<input checked="" type="checkbox"/>
ChildCare_Crawford_County_VM	<input checked="" type="checkbox"/>
ChildCare_Grant_County_VM	<input checked="" type="checkbox"/>
ChildCare_Green_County_VM	<input checked="" type="checkbox"/>
ChildCare_Iowa_County_VM	<input checked="" type="checkbox"/>
ChildCare_Jefferson_County_VM	<input checked="" type="checkbox"/>
ChildCare_LaFayette_County_VM	<input checked="" type="checkbox"/>
Southern_CC_Crawford	<input type="checkbox"/>
Southern_CC_Grant	<input type="checkbox"/>
Southern_CC_Green	<input type="checkbox"/>
Southern_CC_Iowa	<input type="checkbox"/>
Southern_CC_Jefferson	<input type="checkbox"/>
Southern_CC_Rock	<input type="checkbox"/>
Southern_EBD	<input type="checkbox"/>

Page < 1 > of 2 | 25 records per page

Save Save & Continue Cancel Delete Person

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](#)

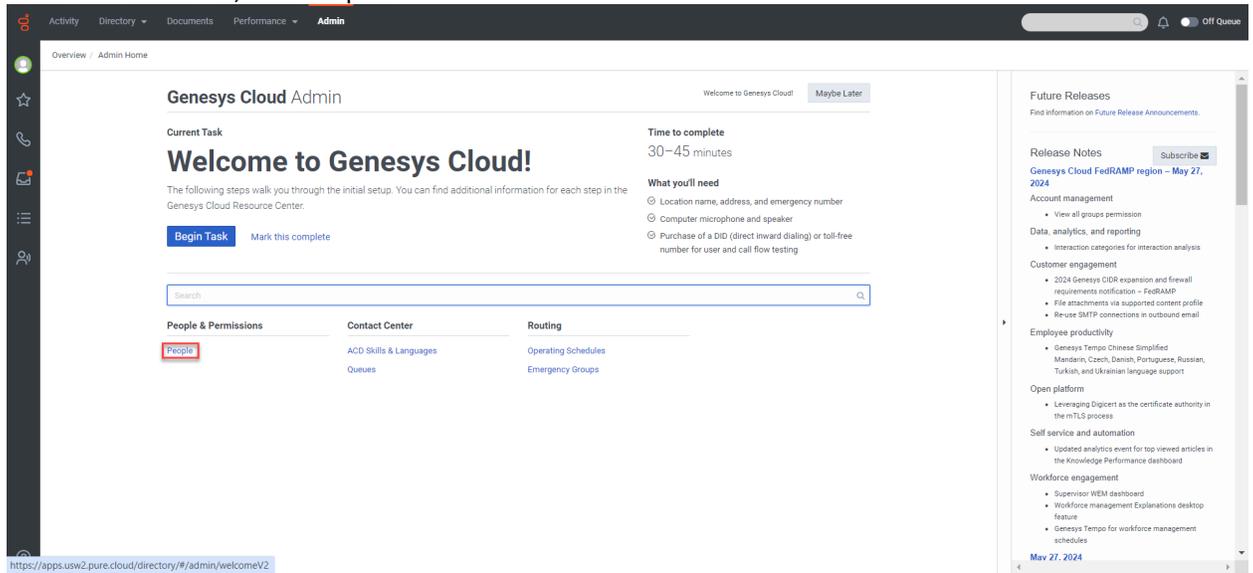
(Video instructions available: [Assigning Languages](#))

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

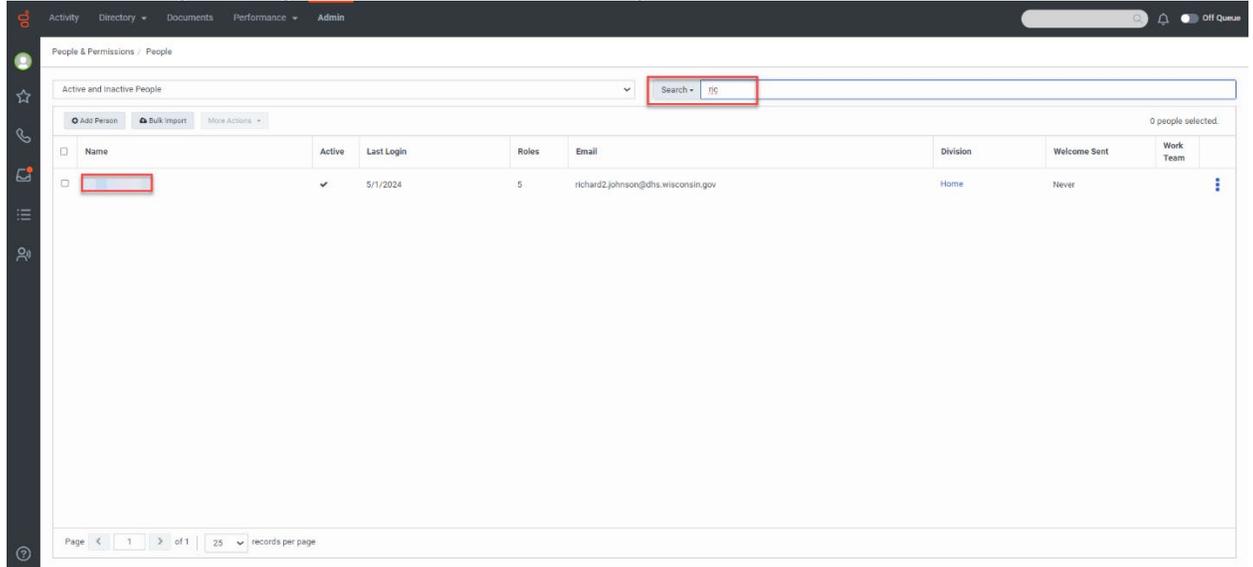
7.7.1 Assign Agent Skills - English

To assign an agent as an English speaker:

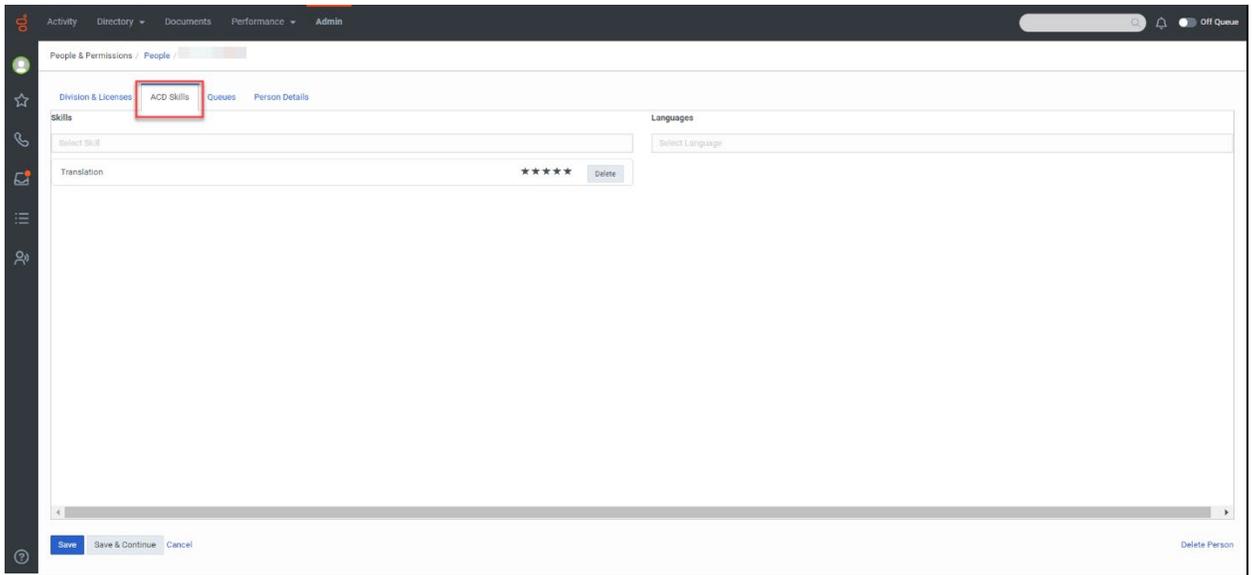
1. From the Admin tab, click People.



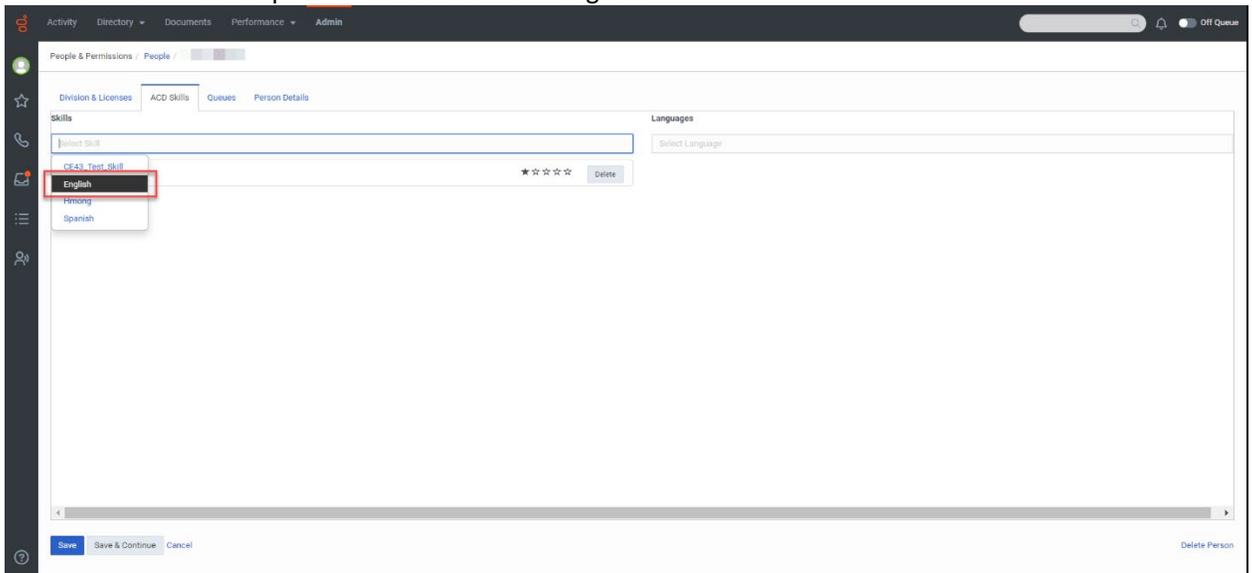
2. Search for an agent using the search box and click the agent's name.



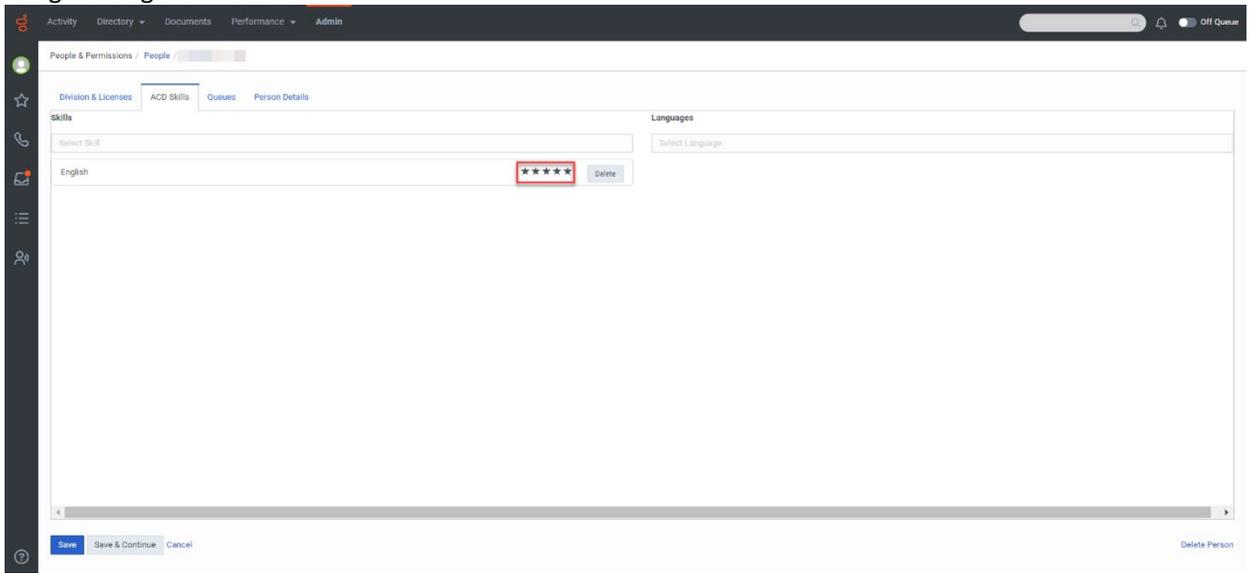
3. Select ACD Skills.



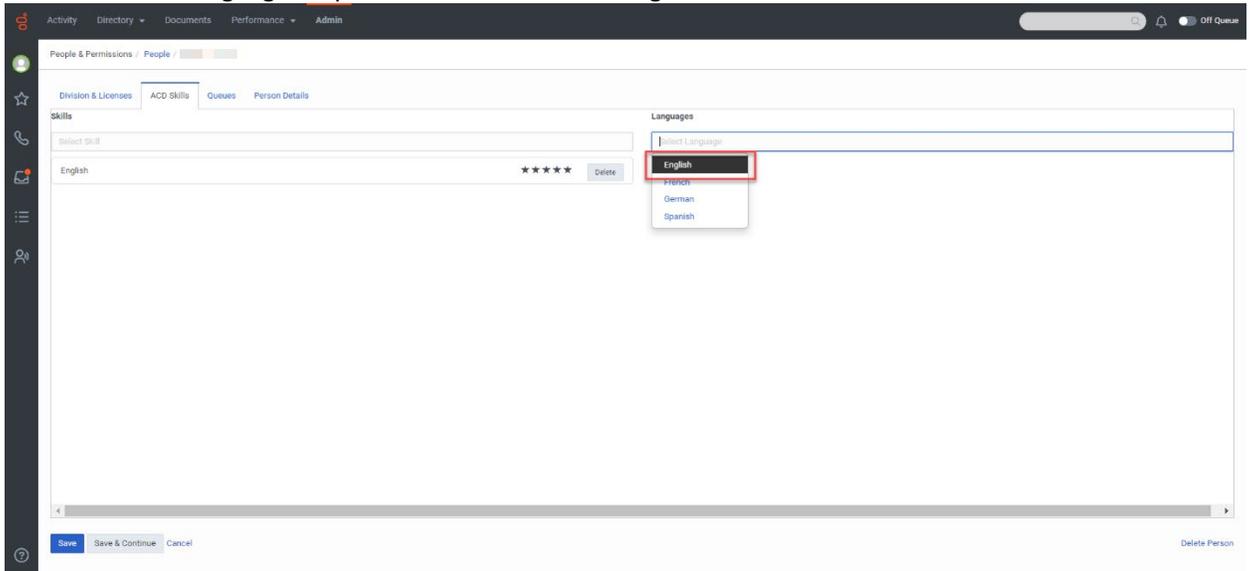
4. Click the Select Skill drop-down menu and select English.



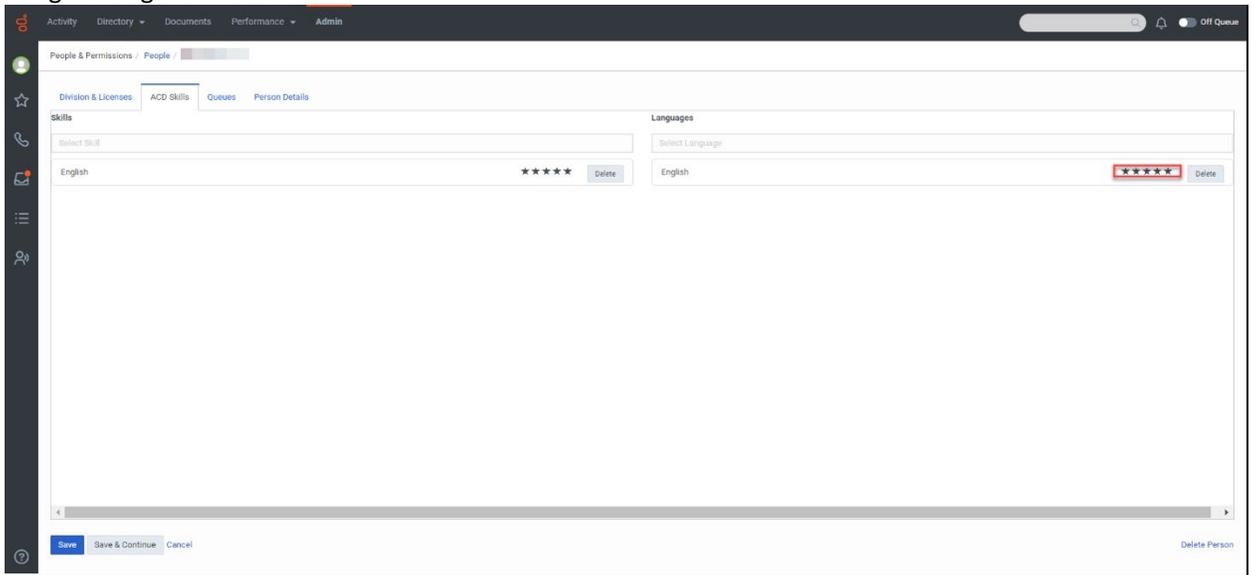
5. Assign the agent five stars.



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



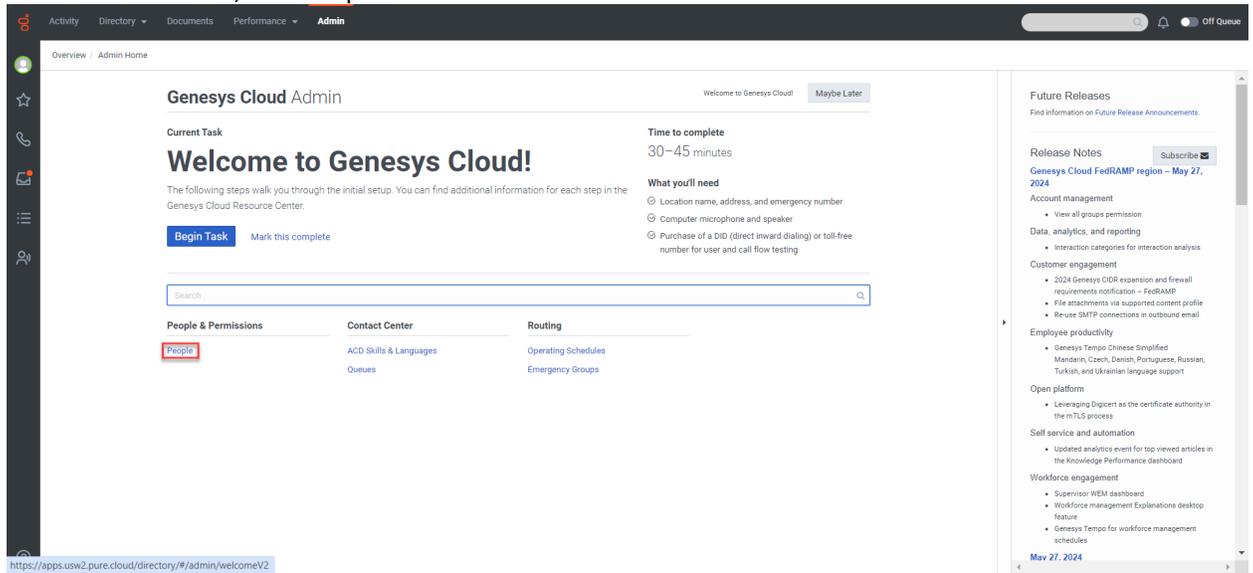
7. Assign the agent five stars.



7.7.2 Assign Agent Skills - Spanish

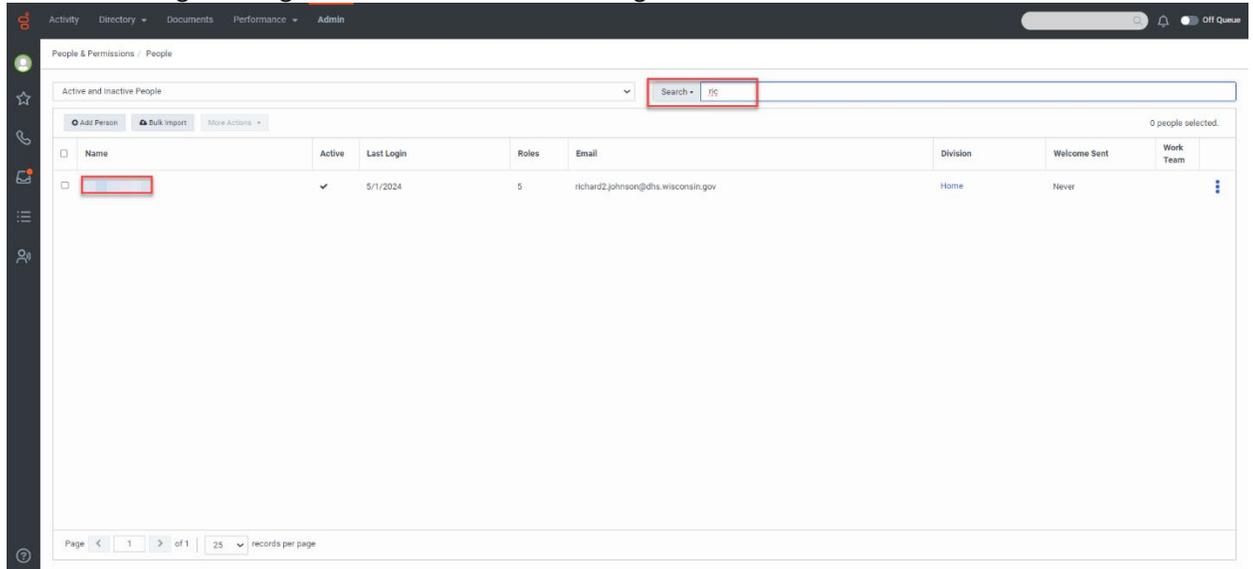
To assign an agent as a Spanish speaker:

1. From the Admin tab, click **People**.



The screenshot shows the Genesys Cloud Admin interface. The main heading is "Welcome to Genesys Cloud!". Below this, there are sections for "Current Task" (30-45 minutes), "What you'll need" (listing location, microphone, and DID), and a search bar. The "People & Permissions" section is highlighted with a red box, and the "People" link within it is also highlighted. Other sections include "Contact Center" (ACD Skills & Languages, Queues) and "Routing" (Operating Schedules, Emergency Groups). A "Future Releases" sidebar is visible on the right.

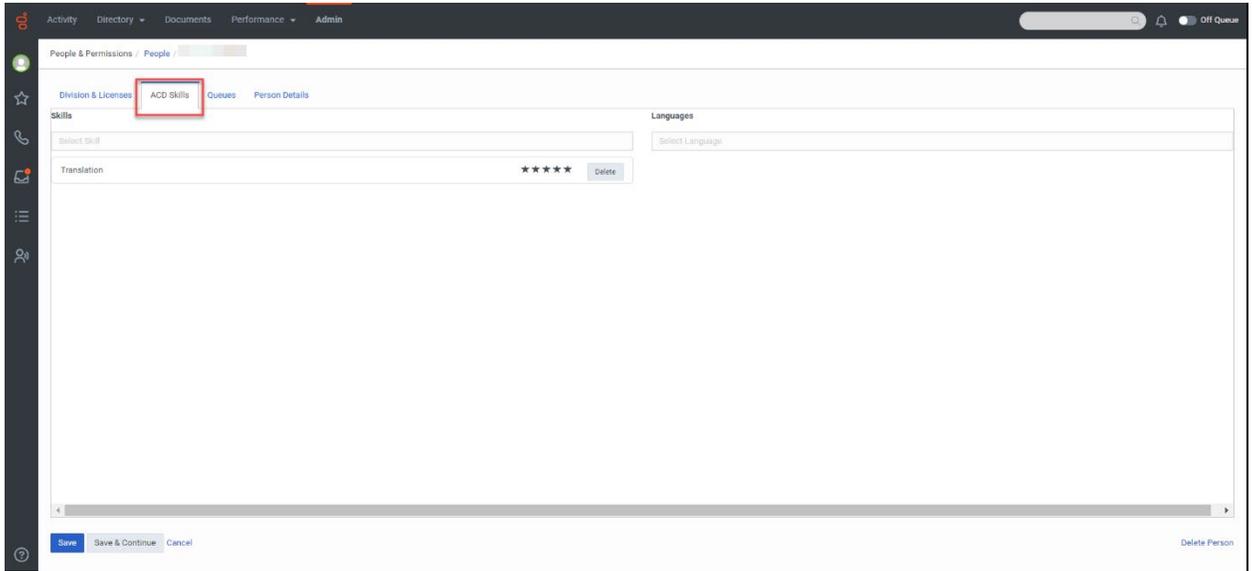
2. Search for an agent using the search box and click the agent's name.



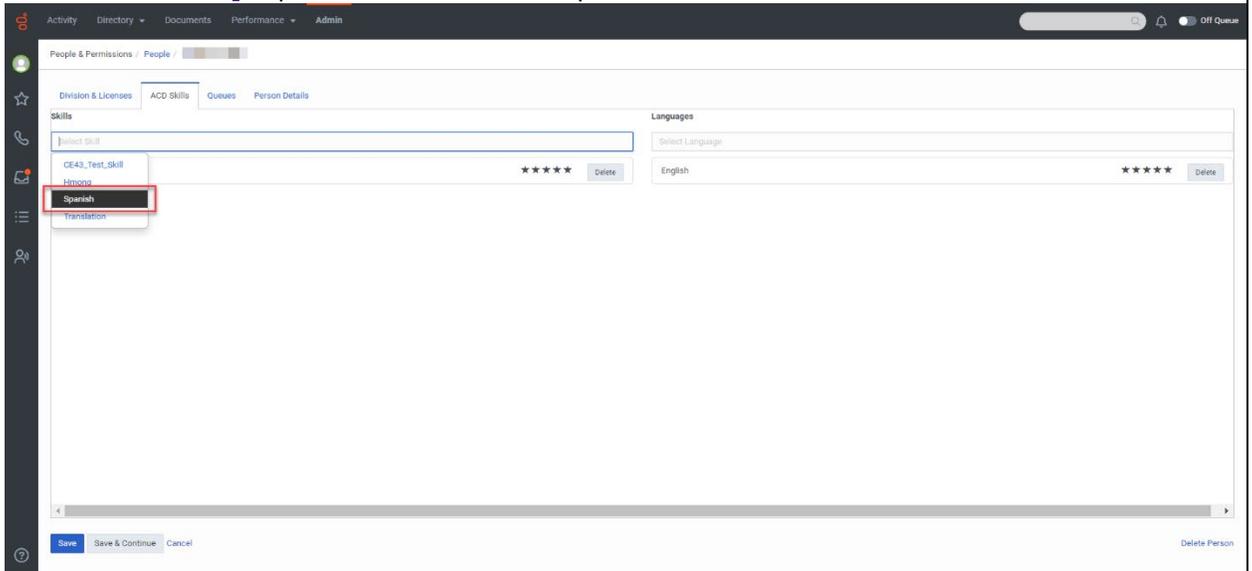
The screenshot shows the "People & Permissions" page. The search box at the top right contains the text "rich". Below the search box, a table lists agents. The first agent's name, "richard2.johnson@dms.wisconsin.gov", is highlighted with a red box. The table has columns for Name, Active, Last Login, Roles, Email, Division, Welcome Sent, and Work Team.

Name	Active	Last Login	Roles	Email	Division	Welcome Sent	Work Team
richard2.johnson@dms.wisconsin.gov	✓	5/1/2024	5	richard2.johnson@dms.wisconsin.gov	Home	Never	

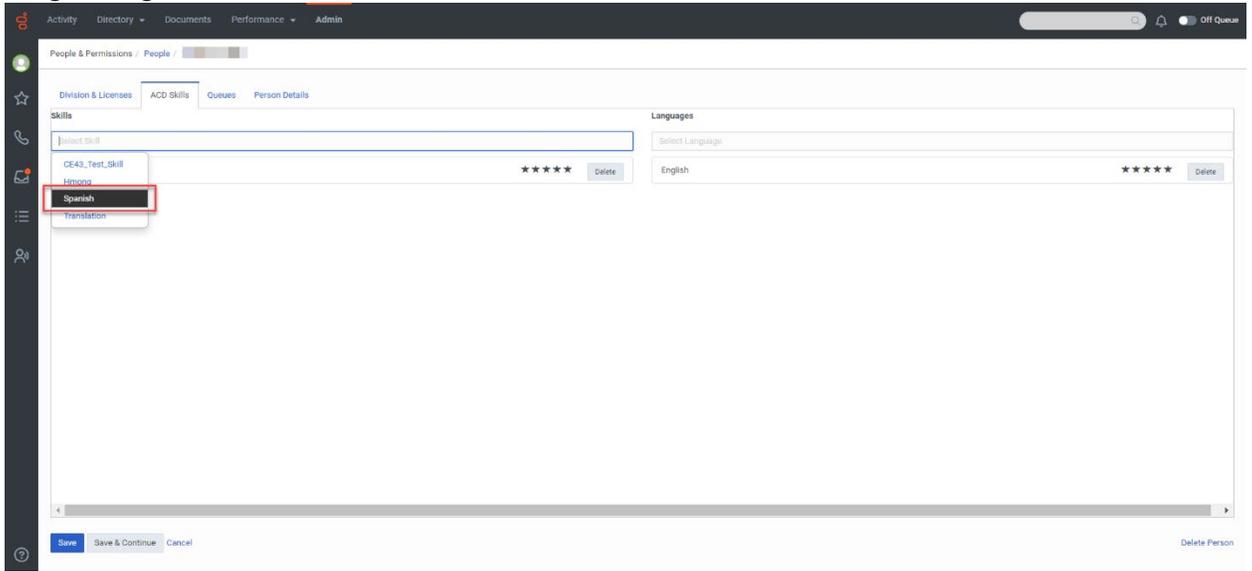
3. Select ACD Skills.



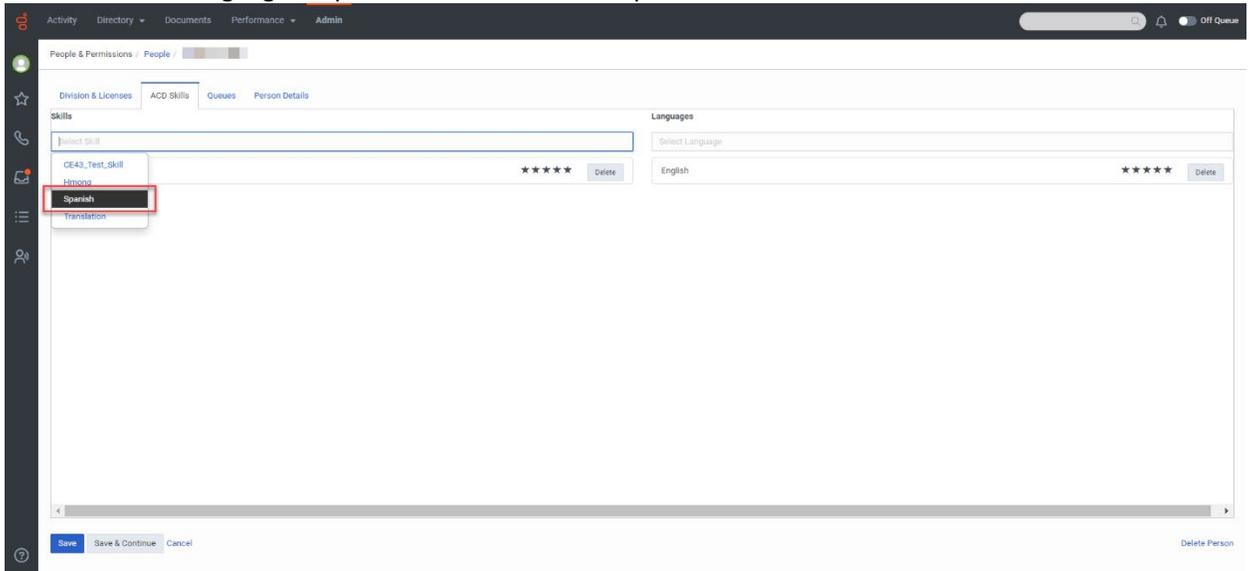
4. Click the Select Skill_ drop-down menu and select Spanish.



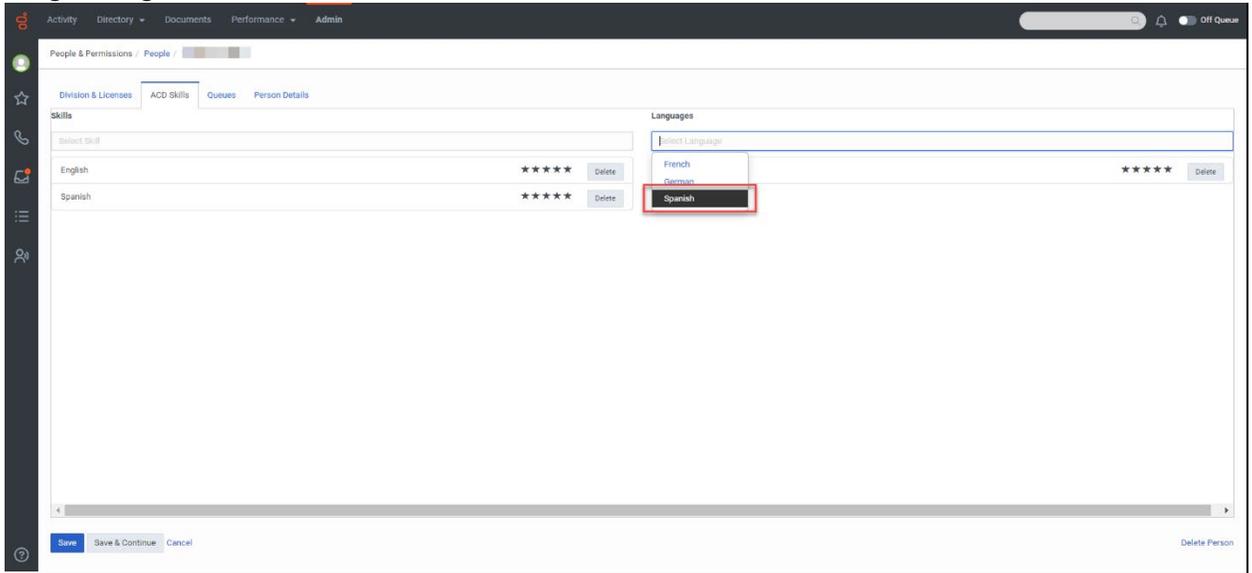
5. Assign the agent five stars.



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



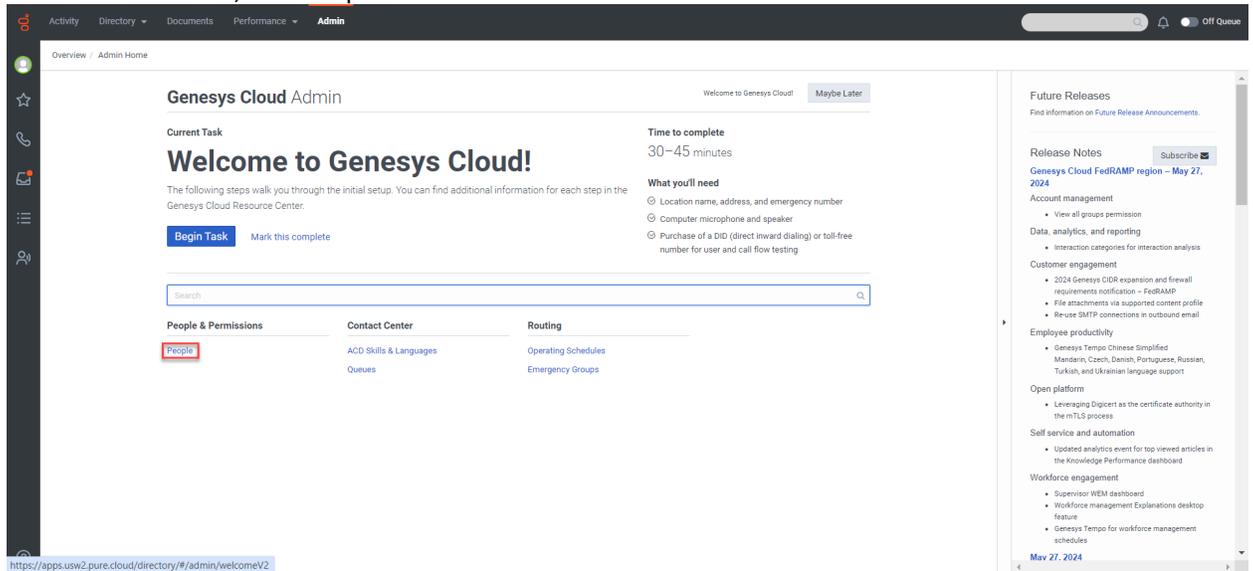
7. Assign the agent five stars.



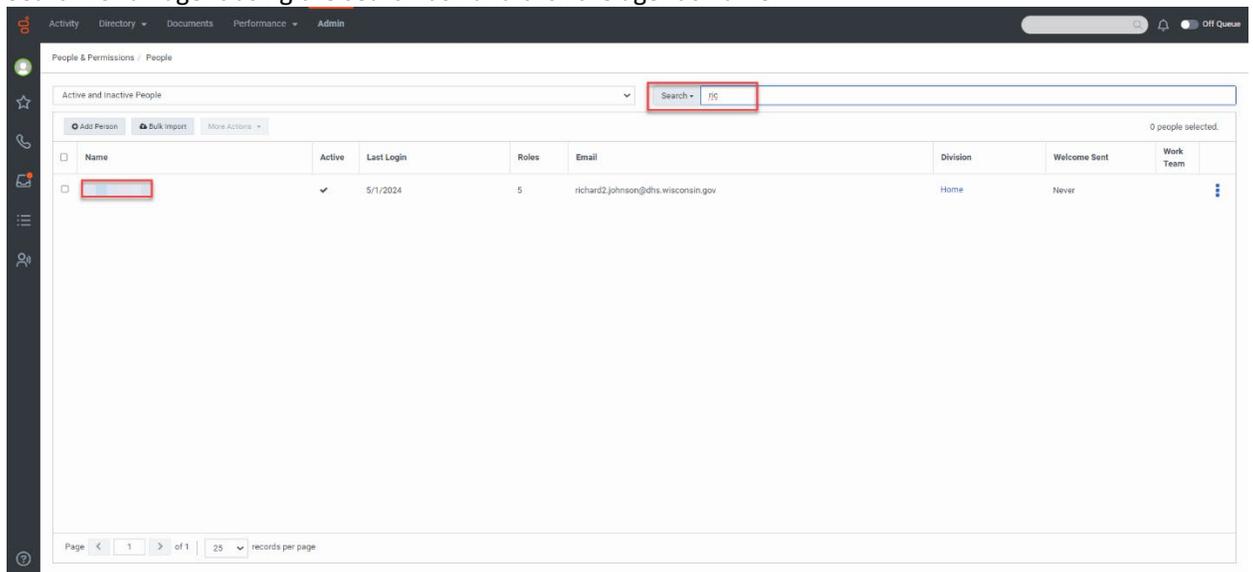
7.7.3 Assign Agent Skills - Hmong

To assign an agent as a Hmong speaker:

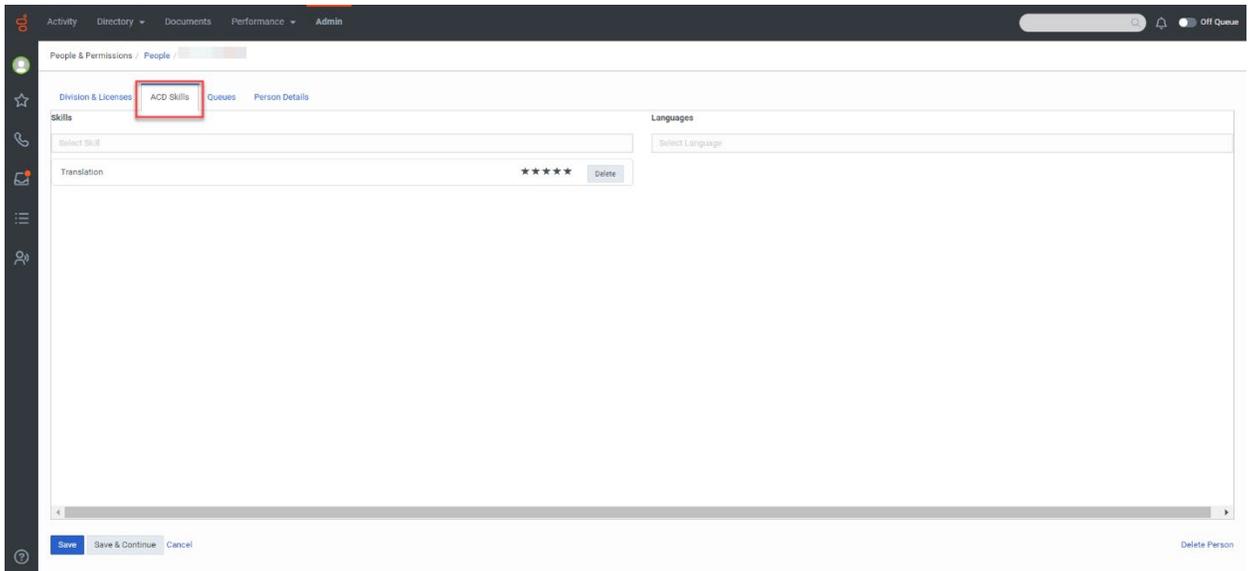
1. From the Admin tab, click **People**.



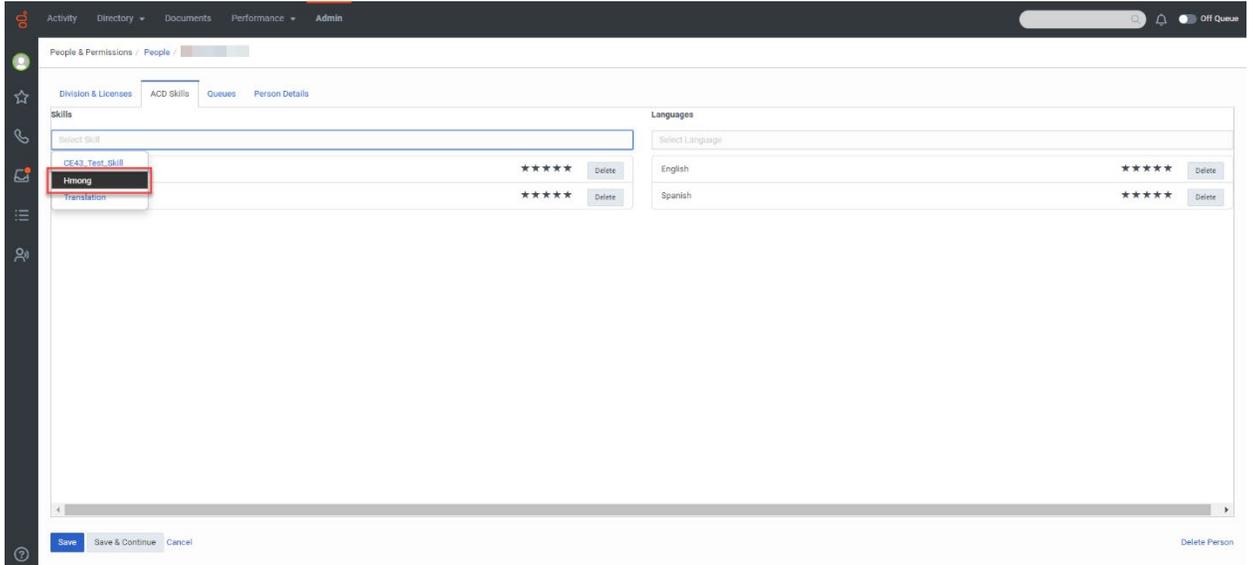
2. Search for an agent using the search box and click the agent's name.



3. Select ACD Skills.



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



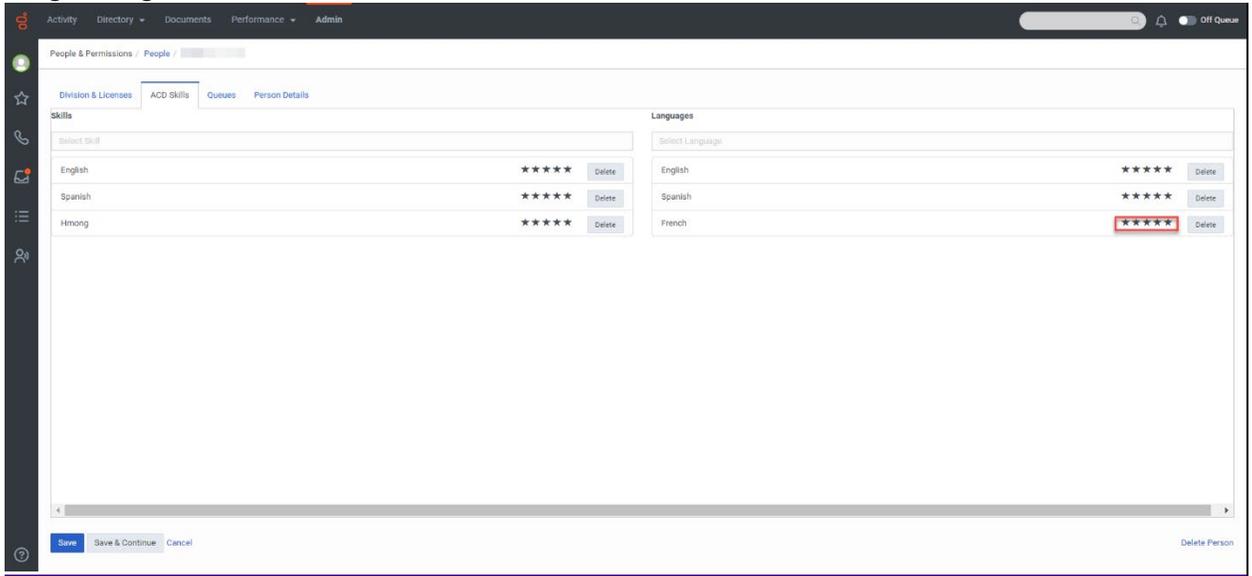
5. Assign the agent five stars.

The screenshot shows the 'People & Permissions' interface with the 'ACD Skills' tab selected. Under the 'Skills' section, there are three rows: English, Spanish, and Hmong. Each row has a 'Select Skill' dropdown, a five-star rating, and a 'Delete' button. The Hmong row's five-star rating is highlighted with a red box. To the right, the 'Languages' section has a 'Select Language' dropdown and two rows for English and Spanish, each with a five-star rating and a 'Delete' button. At the bottom, there are buttons for 'Save', 'Save & Continue', and 'Cancel', and a 'Delete Person' link.

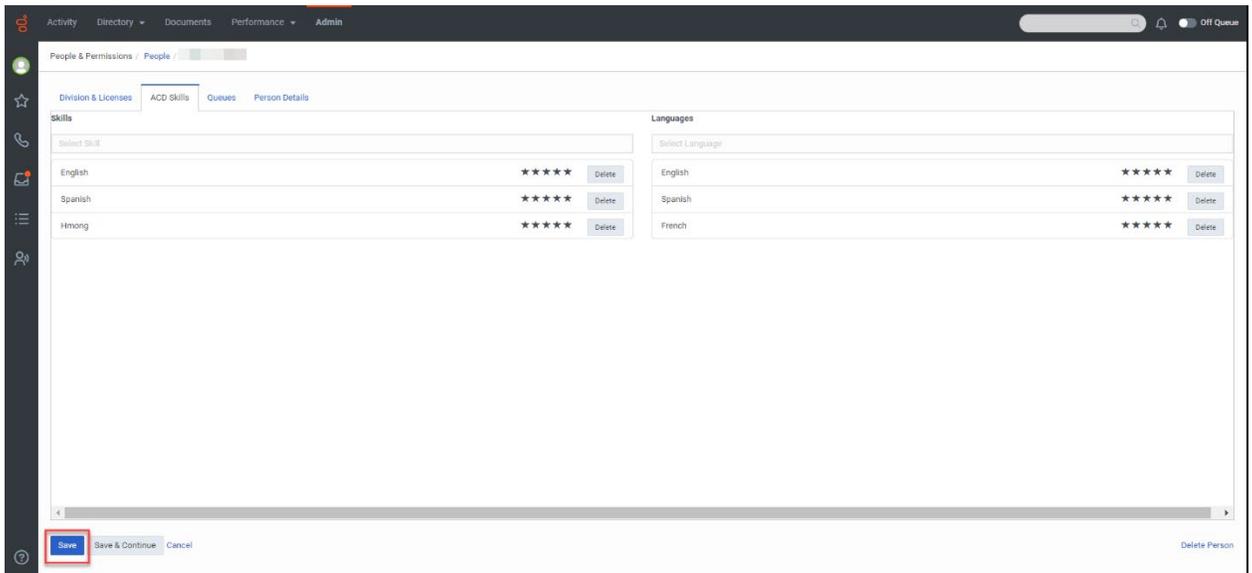
6. Click the Select Language drop-down menu and select French *(the French selection is used to represent Hmong)*.

This screenshot is similar to the previous one, but the 'Languages' section's 'Select Language' dropdown is open, and 'French' is selected. A red box highlights the 'French' option, and a red arrow points to it from a red callout box that says 'Select French for Hmong.'. The 'Skills' section remains the same, with the Hmong row's five-star rating still highlighted. The bottom navigation and 'Delete Person' link are also visible.

7. Assign the agent five stars.



8. Click Save.



8 Reserved

9 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.

~~1.2.~~ Check if the issue and resolution is provided in this section or in this user guide.

~~2.3.~~ If the issue is not in either, see Section 11.1 Submitting a Genesys Support Ticket, for instructions on how to open a ticket and if the issue needs to be escalated.

11.1 Accessing Genesys Troubleshooting

Issue	Description	Resolution
Portal won't load	Genesys portal is not opening through the link on the gateway page	<ul style="list-style-type: none"> • Refresh the Genesys portal page after it fails to open. • Clear browser history. • Select this link to go directly to the Genesys Portal page. • Try opening the Genesys Portal Page in a different browser (Chrome, Firefox or Edge). • Save the portal as a favorite in the browser.
White Label Error	White Label Error displaying when attempting to access the agent page:	<ul style="list-style-type: none"> • Clear browser history. • Select this link to go directly to the Genesys Portal page. • Open the Genesys Portal Page in a different browser (Chrome, Firefox or Edge). • Save the portal as a favorite in the browser.
Can't log in, invalid credentials	Agent Desktop log in:	<ul style="list-style-type: none"> • 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:	<ul style="list-style-type: none"> • All Genesys user IDs are case sensitive. Please ensure use of the correct case. • All users are given a temporary password for Platform Administration when their account was created. If the temporary password is unknown, the user must submit a ticket to the Wisconsin Help Desk. See SECTION 11.6 SUBMITTING A GENESYS SUPPORT TICKET.
	Designer log in:	<ul style="list-style-type: none"> • 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	<ul style="list-style-type: none"> • See Section 2.3 Forgotten Credentials 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](#)

[Users](#) must submit requests to the State of Wisconsin Help Desk for additional troubleshooting support. The Genesys_Cloud Support Team receives and tracks support requests via the Wisconsin Help Desk.

General questions can be sent to:

dhsgenesyscloudproject@dhs.wisconsin.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: helpdesk@wi.gov (helpdesk@wi.gov (preferred))
- Phone: 608-261-4400 (Madison) | 866-335-2180 (Toll-free)
- State employees may use the [Cherwell Portal](#)

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

Subject Line

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

Do	Don't
<ul style="list-style-type: none">• "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"	<ul style="list-style-type: none">• "Genesys"• "Problems"• "Genesys Issue"• "Genesys isn't working"• "Trouble with Genesys"

Description

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

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

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

Show/Hide Example Email Ticket [an example of the page](#)

Send



To helpdesk@wi.gov

Cc

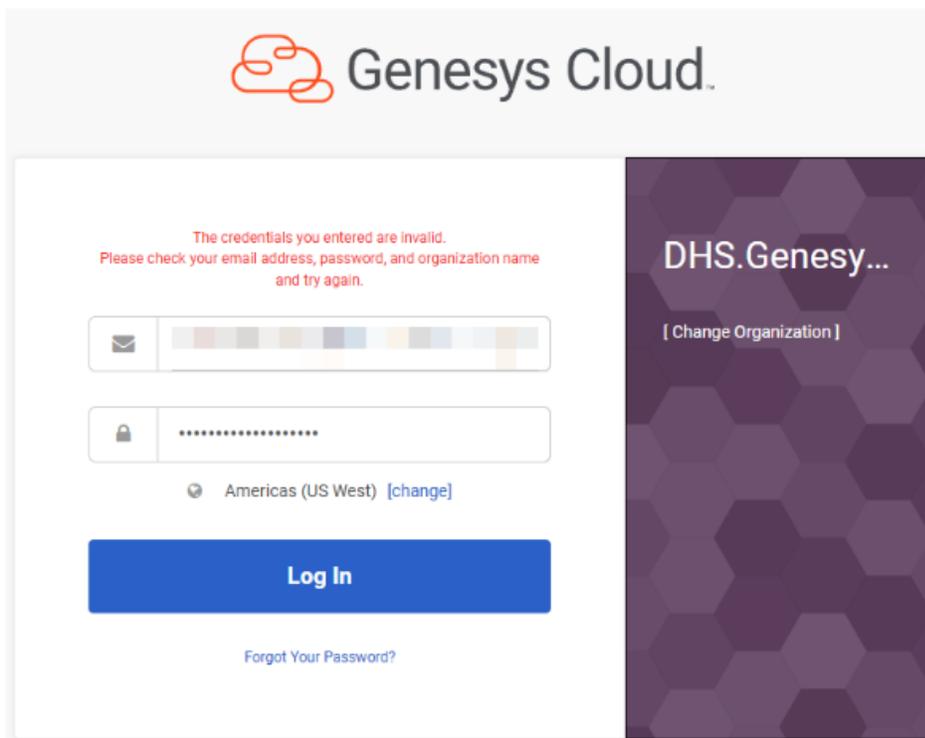
Bcc

Unable to log into Genesys Cloud

Draft saved at 6:49 PM

Hi,

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



Thanks,



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 dhsgenesyscloudproject@dhs.wisconsin.gov when using email to submit a ticket to the Wisconsin Help Desk. If the ticket is called in or opened through the portal send the ticket number to dhsgenesyscloudproject@dhs.wisconsin.gov.

~~Critical or high priority issues are defined as:~~

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

11.1.4 Prioritization

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

<u>Issue</u>	<u>Definition of Issue</u>	<u>Target Response Team</u>
<u>Critical</u>	<u>Renders entire system unusable with no workaround.</u>	<u>Immediate</u>
<u>High</u>	<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>	<u>Immediate</u>
<u>Normal</u>	<u>Little or no obstruction to operations of a call center. Single users, single location unable to receive or make calls.</u>	<u>Same day next day</u>
<u>Low</u>	<u>Routine support requests that do not affect any users' ability to receive or make calls.</u>	<u>Prioritized against other work according to deadlines, importance, etc.</u>

Other Requests

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

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

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

~~1 Introduction to Genesys~~

(Video instructions available: [Introduction to Genesys](#))

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

The Genesys User Guide is organized by sections:

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

~~2 Accessing Genesys~~

~~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~~

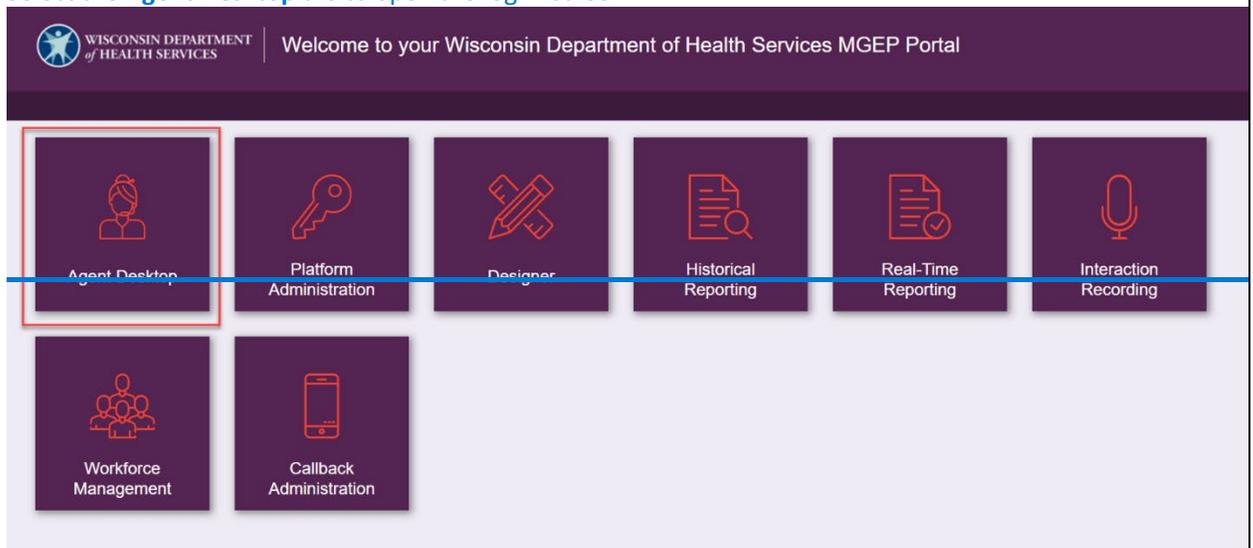
(Video instructions available: [Logging on to Agent Desktop](#))

Agents log in to Genesys from the [Genesys Portal](#). These instructions can be used by agents, supervisors, and segment administrators.

To log in to Genesys as an agent:

1. ~~Open the [Genesys Portal](#) with Firefox, Edge, or Chrome.~~

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



3. Complete the Tenant and Username fields with:

1. Tenant: Enter `sowi.mgep.info`
2. Username: Enter your WAMS ID (case sensitive)

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



GENESYS[™] Workspace

Tenant

sowi.mgep.info

Username *

Remember me

Next

4. —

5. — Select **Next**.

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



Secure Logon
for DHS-GENESYS

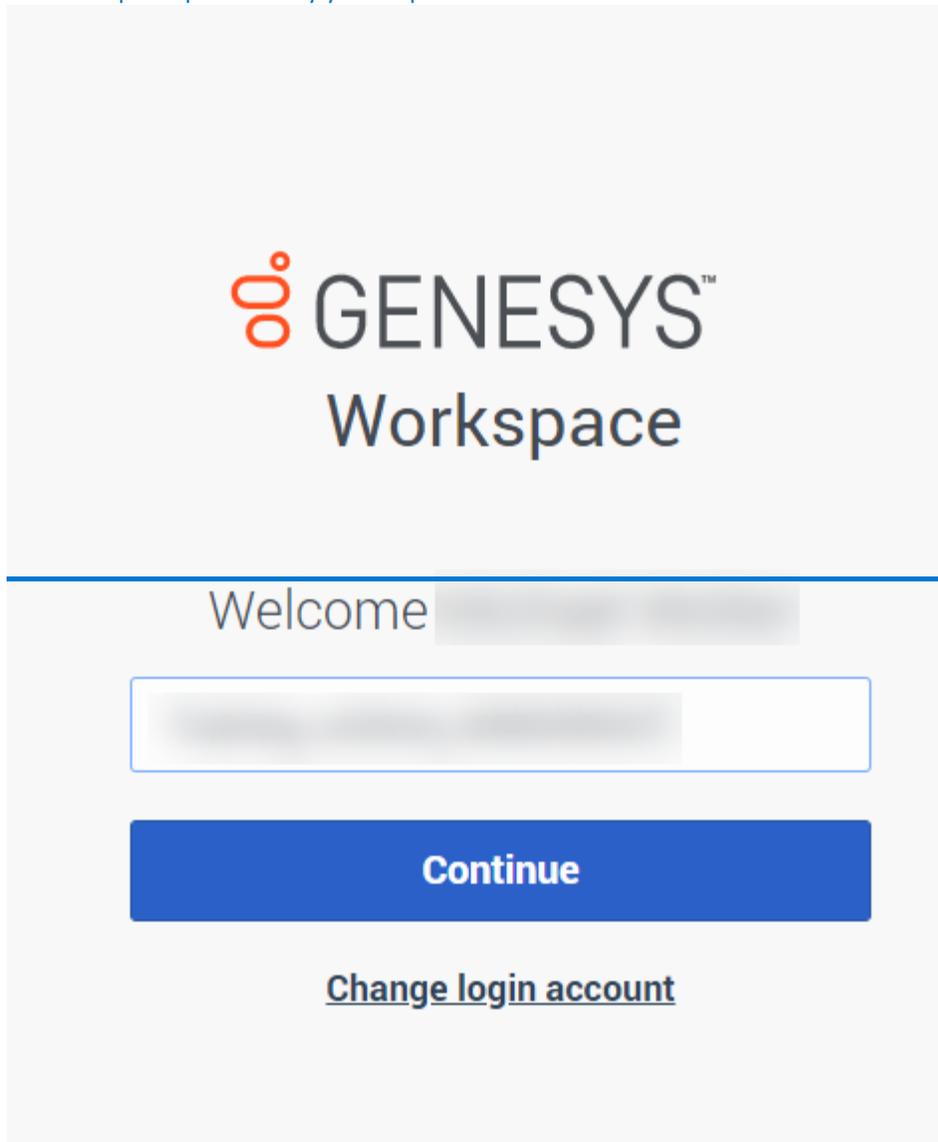
Username

Password

Logon

7. — Select **Logon**.

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



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

2.2 Logging off the Agent Desktop

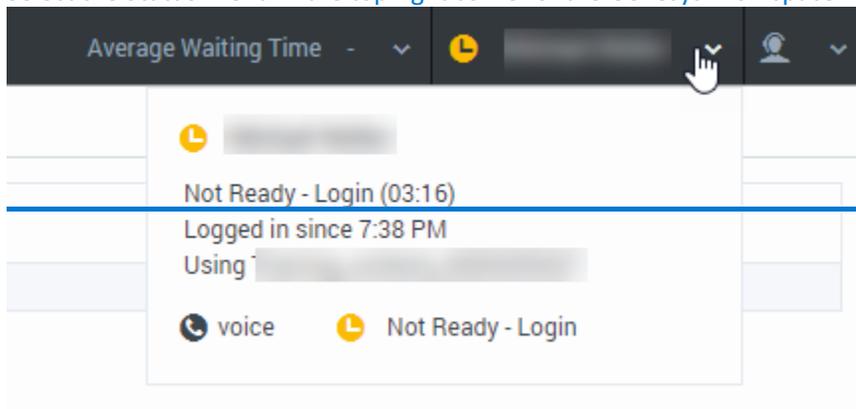
(Video instructions available: [Logging off the Agent Desktop](#))

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

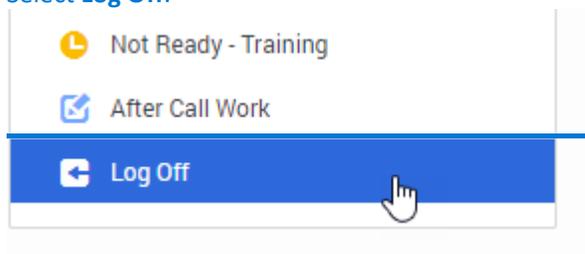
Note: It is extremely important to select the log off status before exiting Genesys or you may continue to receive calls to your phone.

To log off the Genesys Workspace:

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

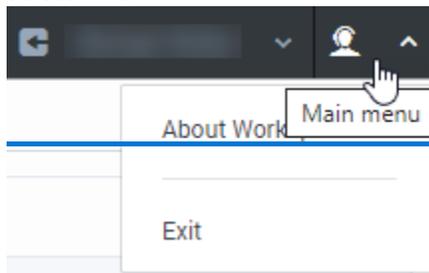


2. Select **Log Off**.

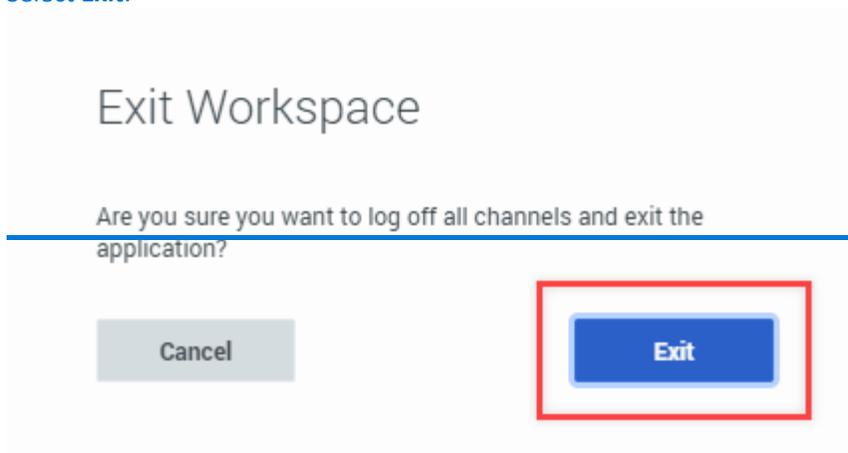


3. Select the **Main Menu** icon.

4. Select **Exit**.



5. Select **Exit**.



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

2.3 Forgotten Credentials

(Video instructions available: [Forgotten Credentials](#))

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

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

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

The user can attempt to sign in as many times as needed, after three unsuccessful login attempts, the user is locked out of all applications that require use of a WAMS ID.

[Show/Hide an example of the page](#)

3. Follow the Wisconsin User ID Account Recovery instructions on the Wisconsin User ID page.
[Show/Hide an example of the page](#)

3 Agent Desktop

[3.1 Agent Desktop Workspace](#) (Video instructions available: [Agent Desktop Workspace](#))

[3.2 Connect View Tab](#) (Video instructions available: [Connect View Tab](#))

[3.3 Monitor View Tab](#)

[3.4 Voice Interaction Window](#) (Video instructions available: [Voice Interaction Window](#))

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

3.1 Agent Desktop Workspace

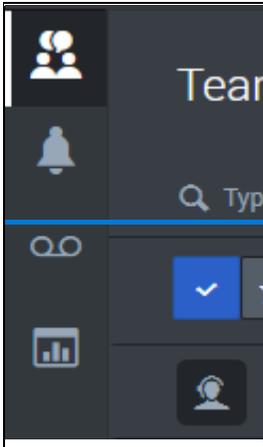
(Video instructions available: [Agent Desktop Workspace](#))

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

Sidebar

The sidebar links to:

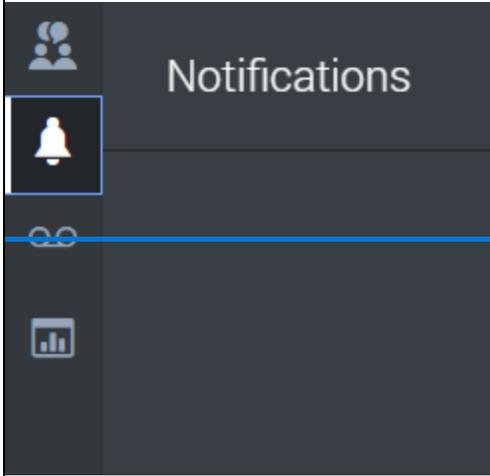
Team Communicator	Used to dial external numbers and internal contacts, set certain numbers or contacts as favorites, and view a history of outbound calls.
-------------------	--



Team

Typ

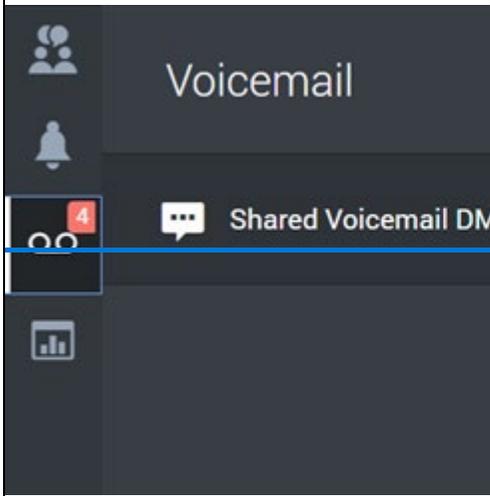
Notifications



Notifications

Indicates any potential errors in the system.

Voicemail



Voicemail

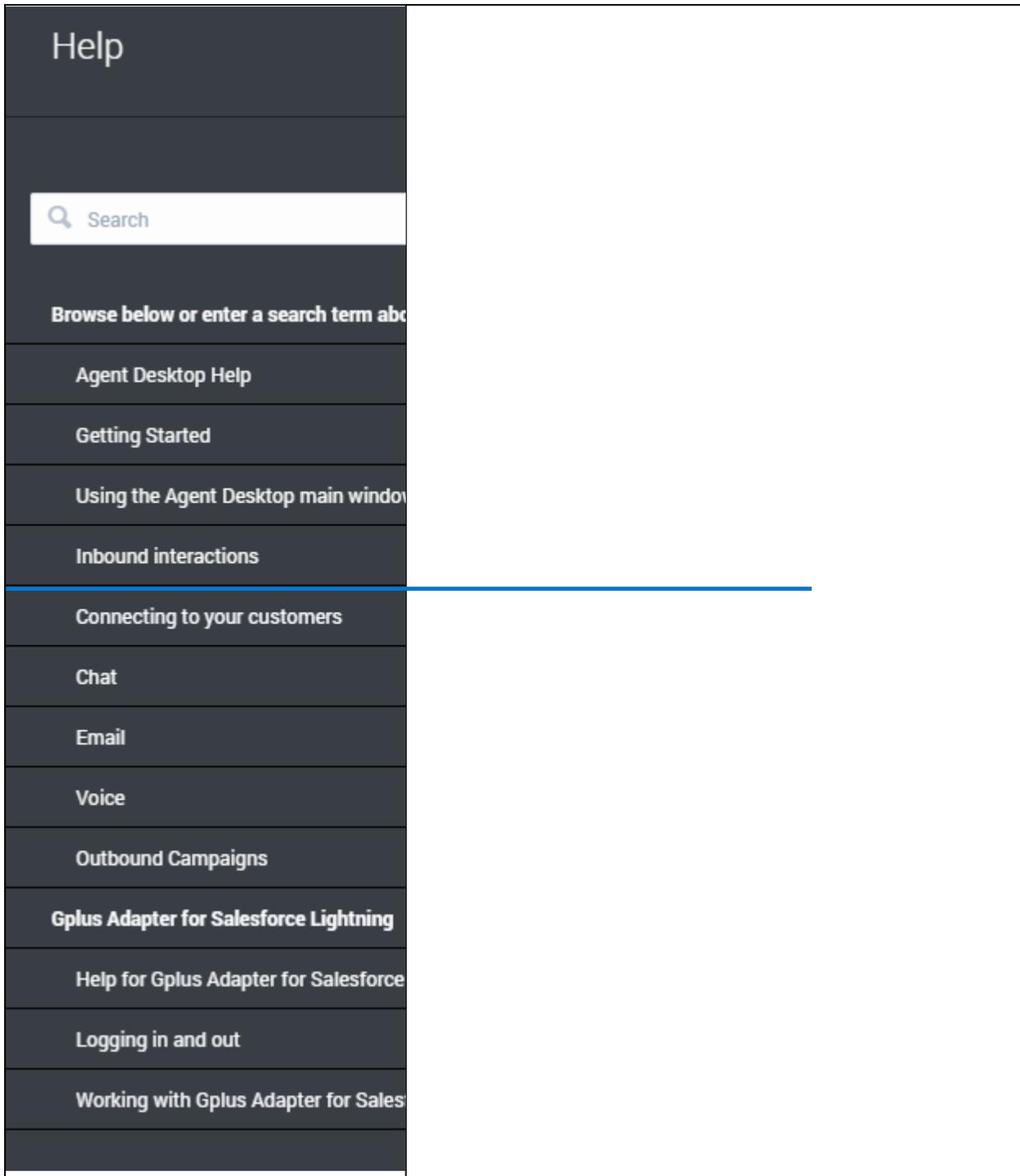
Shared Voicemail DM

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

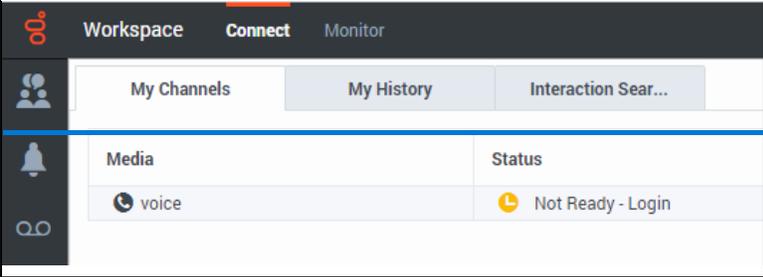
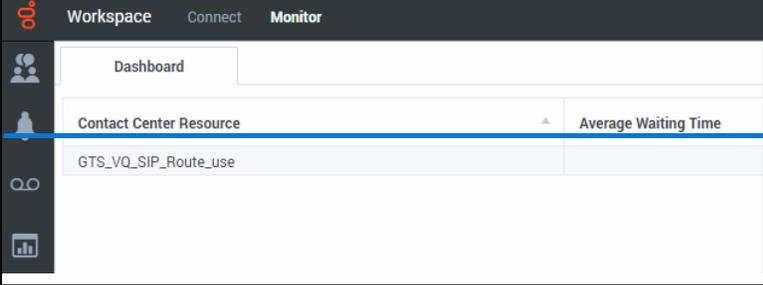


-

Top Navigation Bar

The Top navigation bar links to:

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

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

3.2 Connect View Tab

(Video instructions available: [Connect View Tab](#))

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

My Channels

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

[Show/Hide an example of the page](#)

My History

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

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

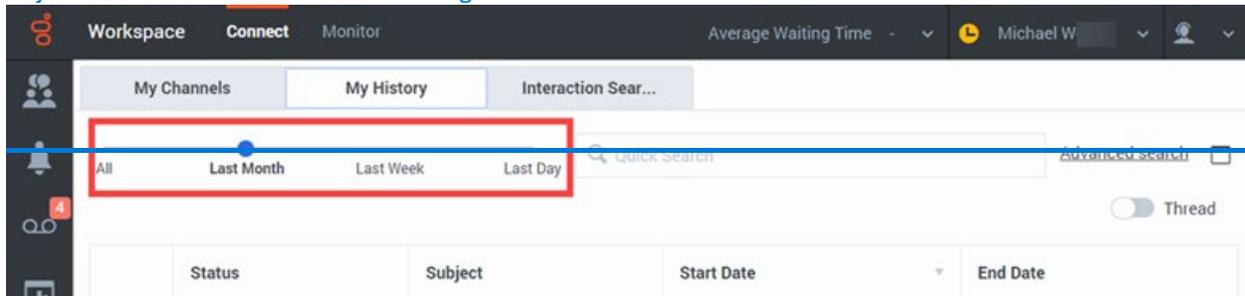


Outbound calls have a yellow arrow next to the phone icon.

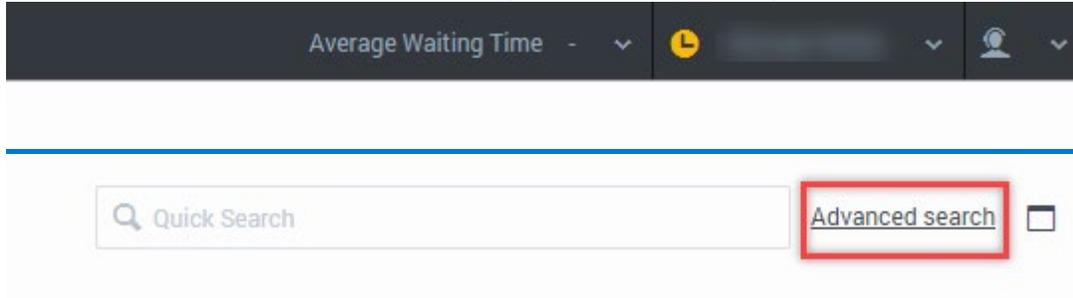


[Show/Hide an example of the page](#)

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

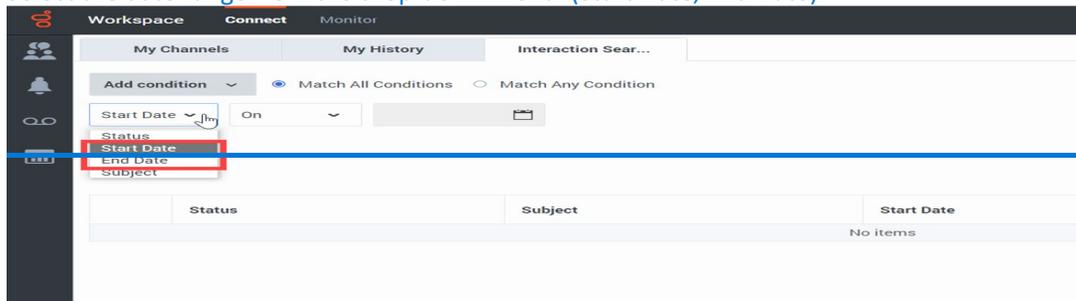


Or, use the Advanced search feature to set specific search criteria by date.

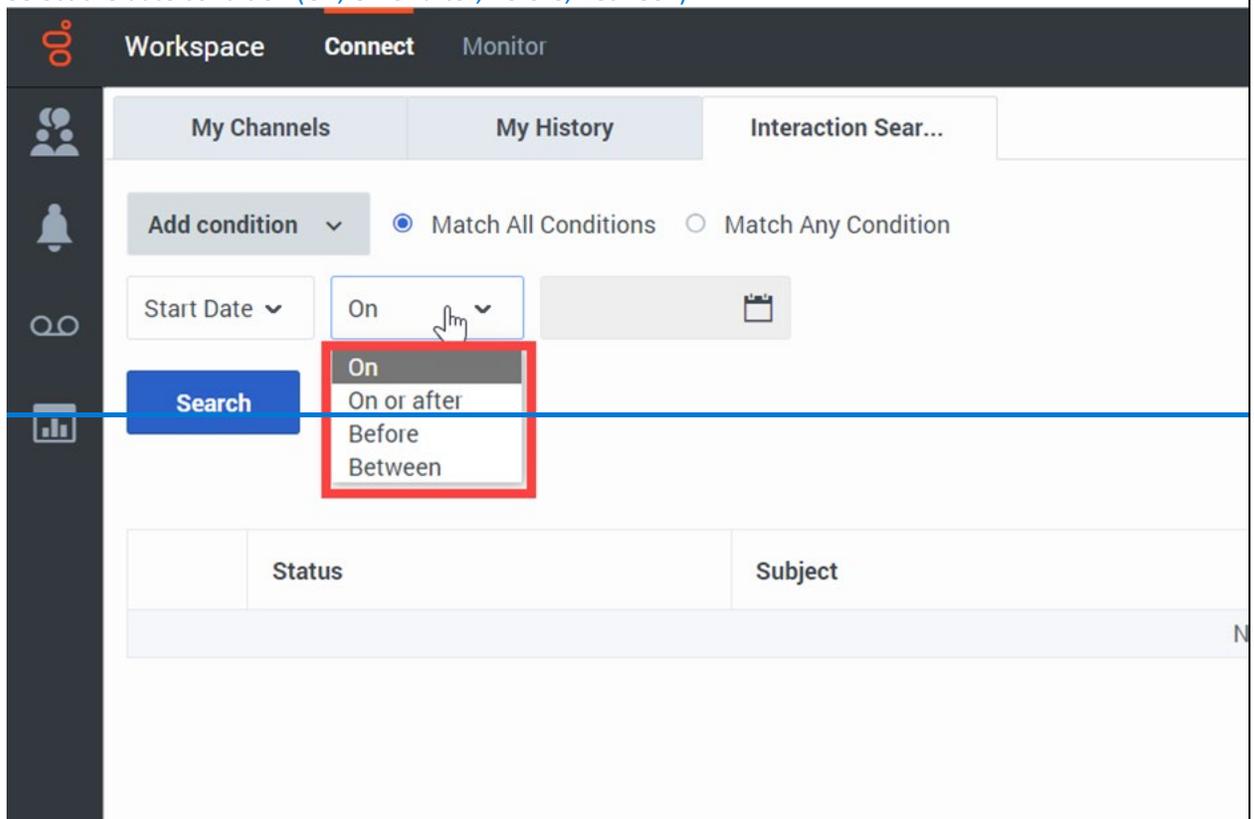


Here are the steps to search for a call using Advanced search:

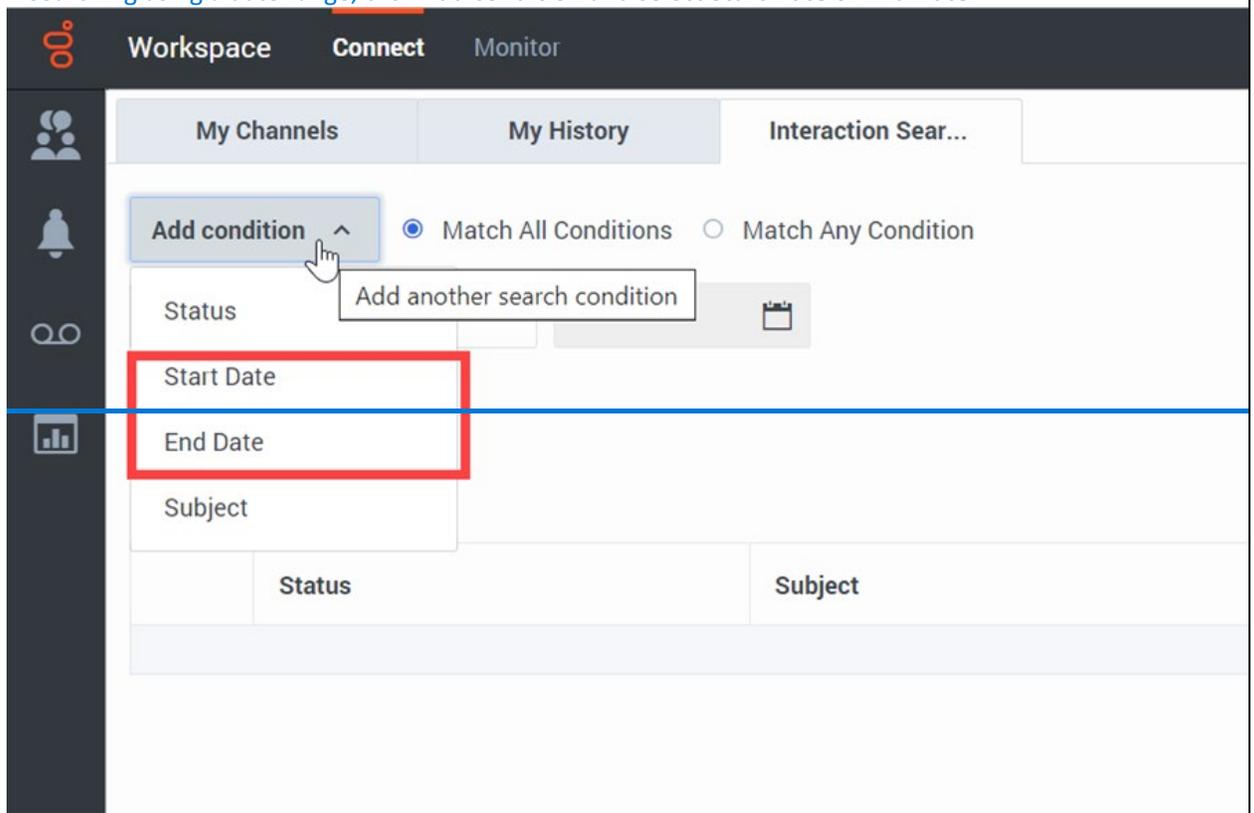
1. Select the date range from the drop-down menu. (Start Date, End Date).



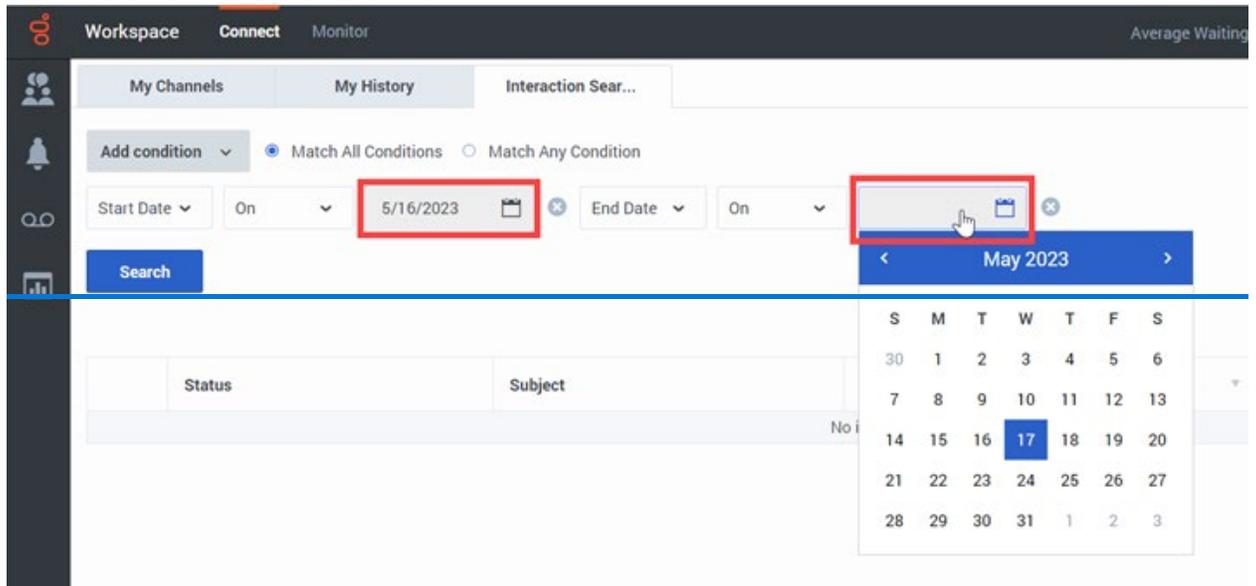
2. Select the date condition (On, On or after, Before, Between).



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

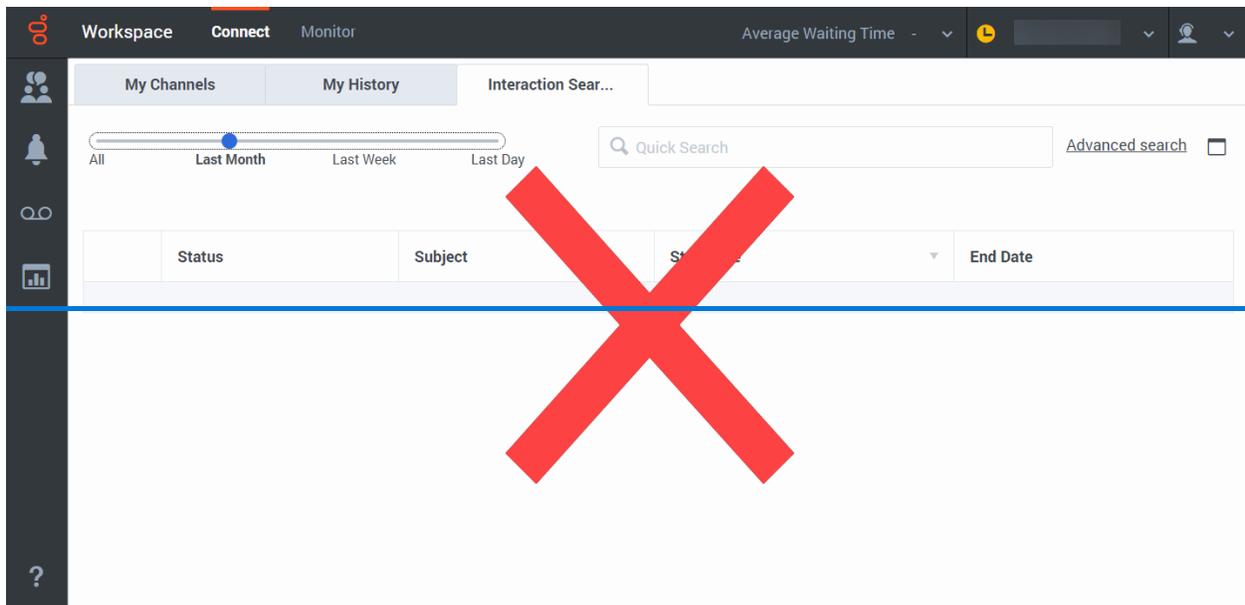


4. Select the date or dates from the calendar.



Interaction Search

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



3.3 Monitor View Tab

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

Show/Hide an example of the page

The specific statistics displayed may vary by agency but include:

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

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

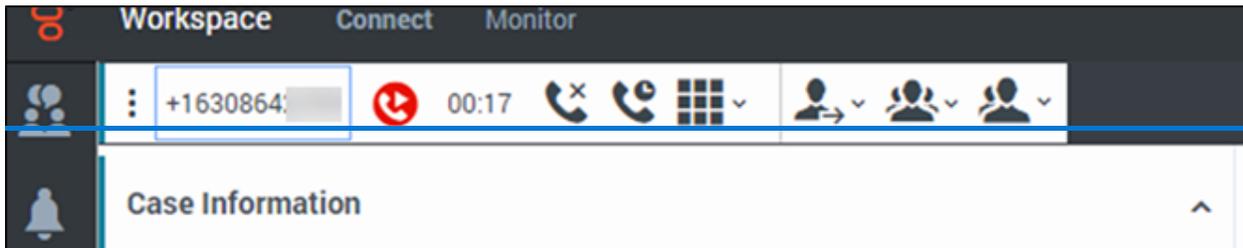
Note AWT is not the same as Average Speed of Answer (ASA). ASA is only answered calls. ASA is not visible in this view.

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

3.4 Voice Interaction Window

(Video instructions available: [Voice Interaction Window](#))

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



Interaction Bar

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

Here, agents can:

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

Case Information

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

The screenshot shows a workspace interface with a dark header containing 'Workspace', 'Connect', and 'Monitor'. Below the header is a call control bar with a phone number '+1630864', a red status icon, a timer '00:17', and various call control icons. The main content area is titled 'Case Information' and displays the following details:

- Origin: Inbound call to +1540485
- CallerID: +1630864
- ConnectionID: 00b80355db9fa202
- DialedNumber: +1540485
- Language: English

Below the Case Information section is a 'Dispositions' section with a search bar and a list of disposition codes: Case Updated, Completed Application, and Referral made.

Information displayed for inbound and outbound calls includes:

Inbound Calls	Outbound Calls
<ul style="list-style-type: none">• Origin• Caller ID• ConnectionID• Dialed Number• Language used on calls in this queue• Disposition codes	<ul style="list-style-type: none">• Origin• Disposition codes

4 Setting a Status

(Video instructions available: [Setting a Status](#))

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

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

The statuses may include:

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

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

5 Call Handling

[5.1 Receiving a Call](#) (Video instructions available: [Receiving a Call](#))

[5.2 Making a Call](#) (Video instructions available: [Making a Call](#))

[5.3 Placing a Call on Hold](#) (Video instructions available: [Placing a Call on Hold](#))

[5.4 Transferring a Call](#)

[5.4.1 Instant Transfer](#) (Video instructions available: [Instant Transfer](#))

[5.4.2 Instant Conference](#) (Video instructions available: [Instant Conference](#))

[5.4.3 Consult Call](#) (Video instructions available: [Consult Call](#))

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

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

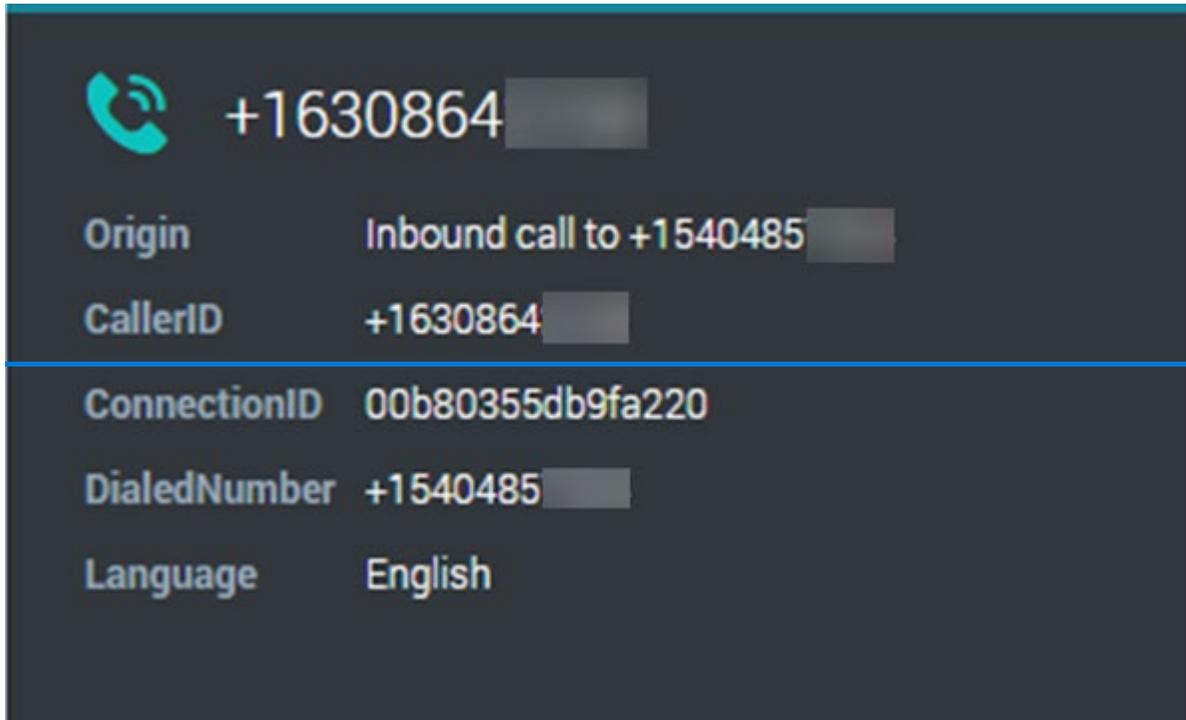
5.1 Receiving a Call

(Video instructions available: [Receiving a Call](#))

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

Notification of Call

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



The call notification includes:

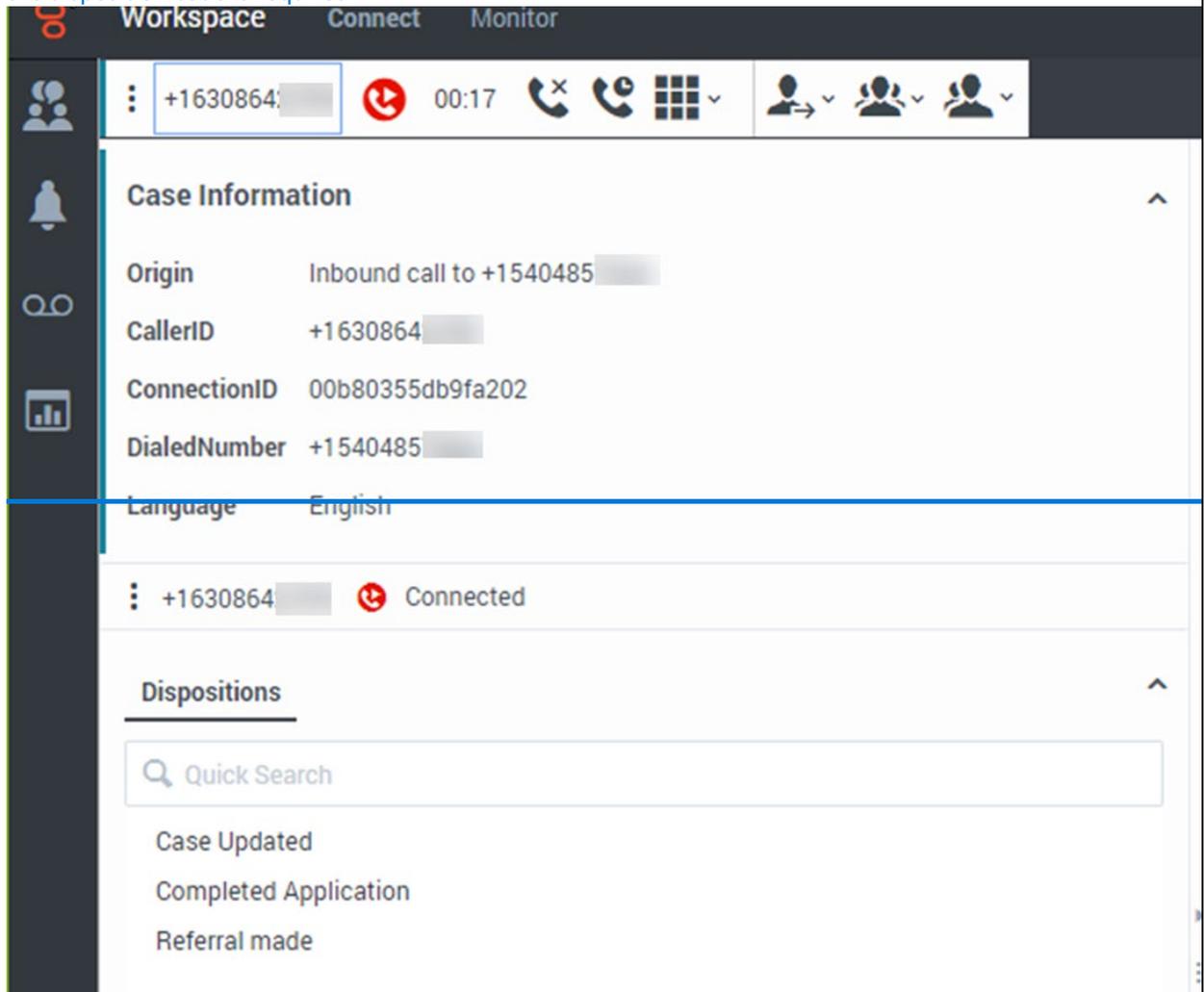
- Name or number of the caller
- Origin of the call
- Caller ID
- Connection ID
- Dialed number
- Language and skill you are currently in

Answering the Call

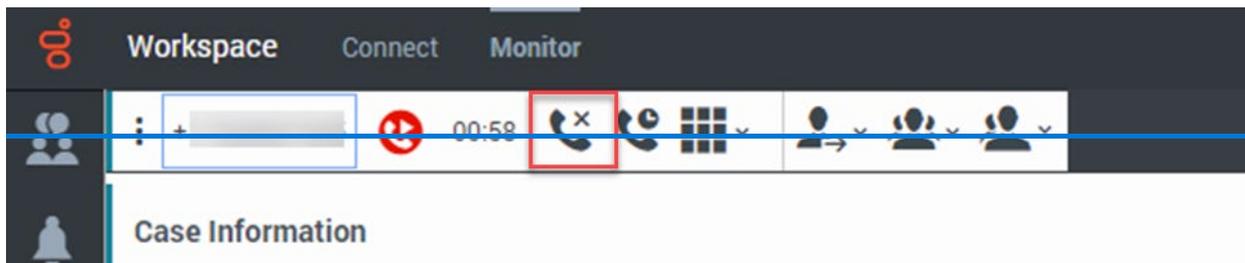
There is often a short pause between when the call is shown on the desktop and when your phone rings.

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

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



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



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

5.2 Making a Call

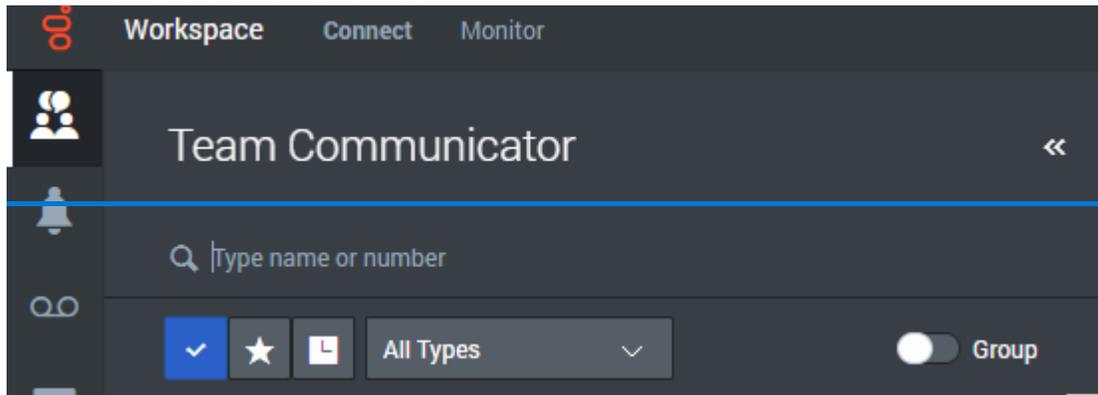
(Video instructions available: [Making a Call](#))

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

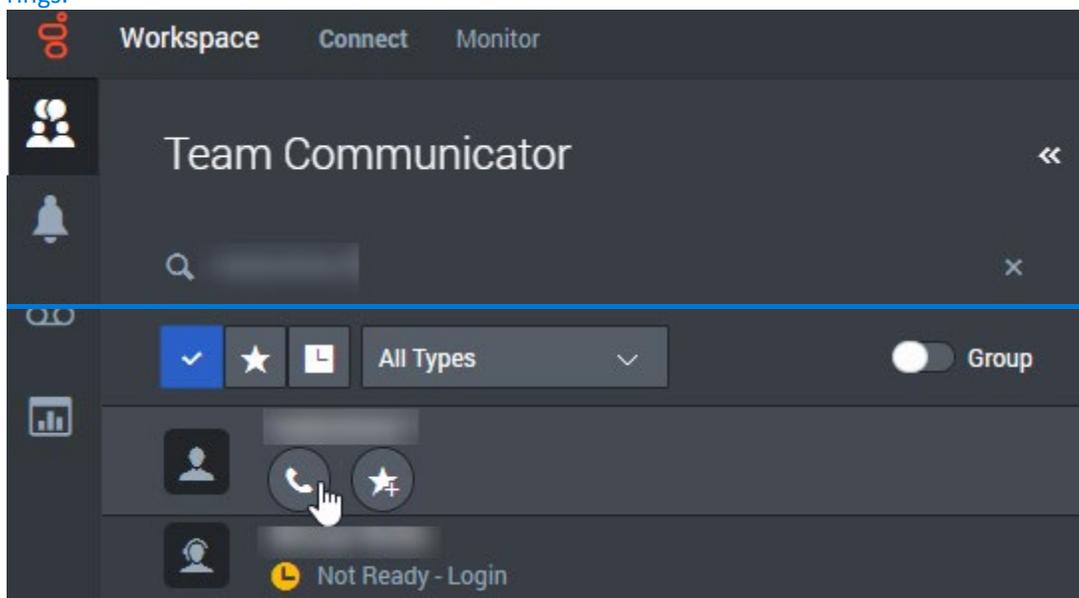
When making a call, your status shows as busy to other agents and your supervisor and other calls cannot be received.

To make a call:

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

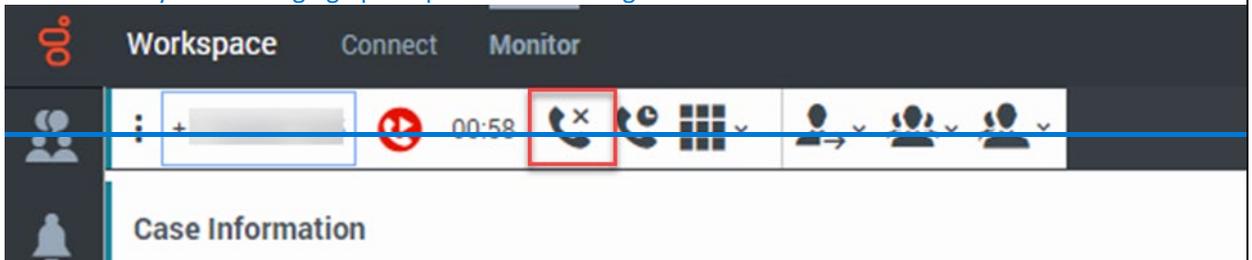


2. Select the **Phone** icon or press **Enter** after typing the phone number. After a short pause, your phone rings.



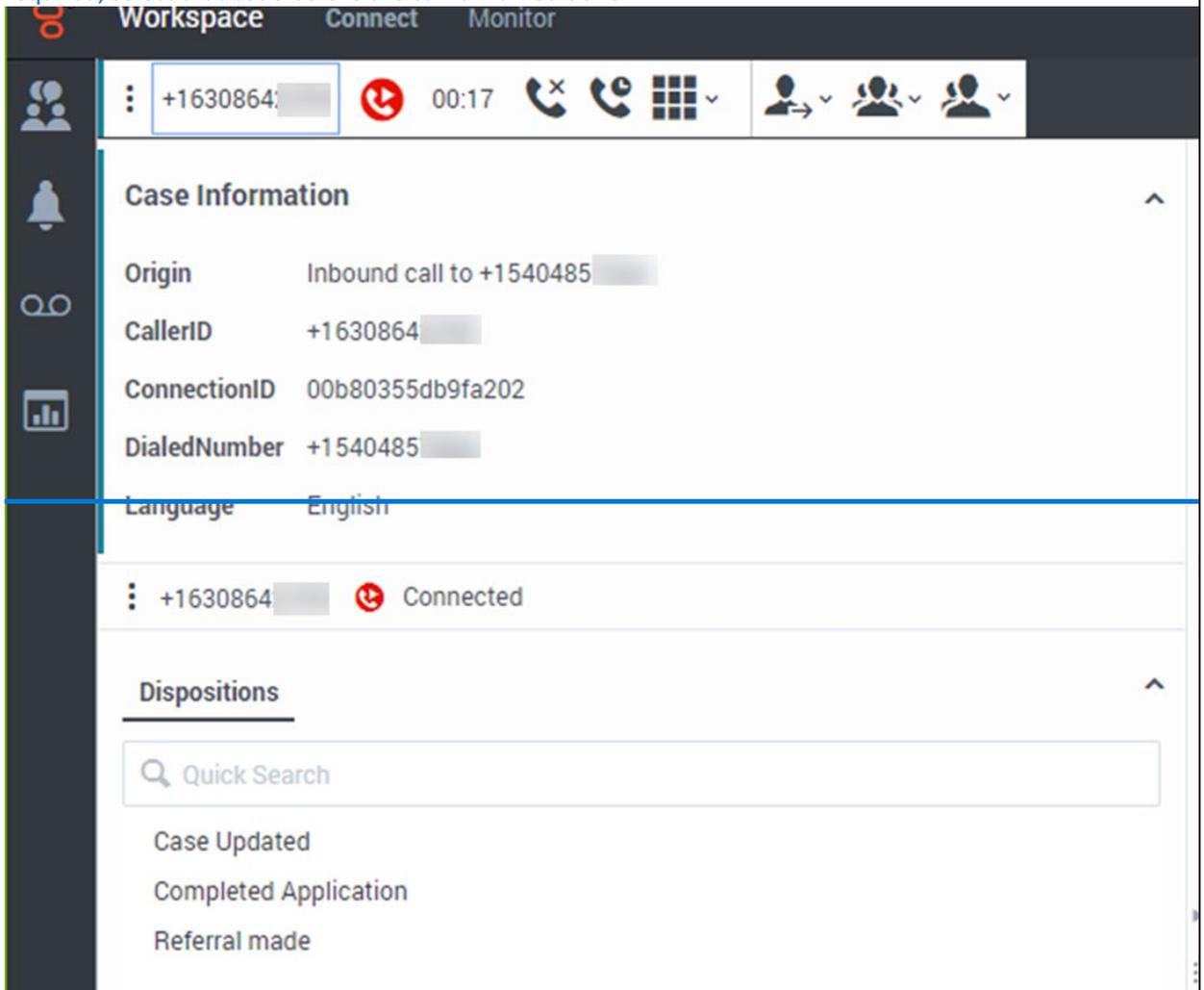
3. Pick up the phone for the call to go out. The number that displays to the recipient is the agency's phone number.

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



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

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

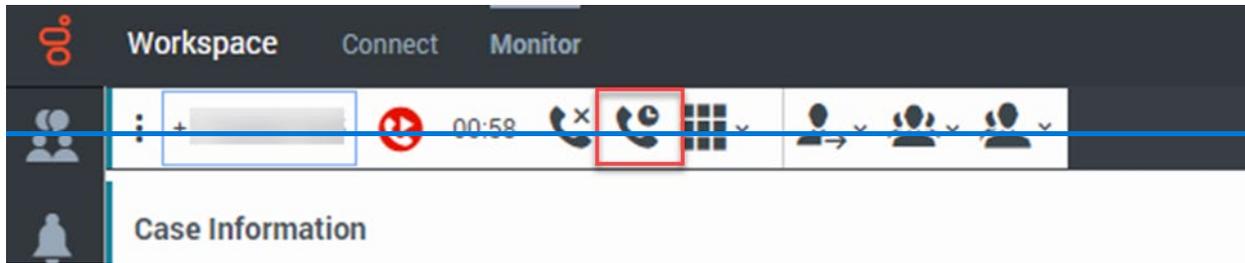


5.3 Placing a Call on Hold

(Video instructions available: [Placing a Call on Hold](#))

To place a call on hold:

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



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

5.4 Transferring a Call

[5.4.1 Instant Transfer](#)

[5.4.2 Instant Conference](#)

[5.4.3 Consult Call](#)

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

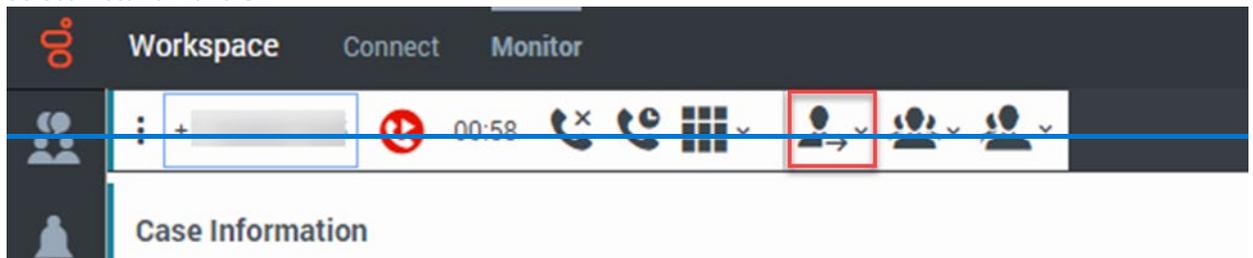
5.4.1 Instant Transfer

(Video instructions available: [Instant Transfer](#))

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

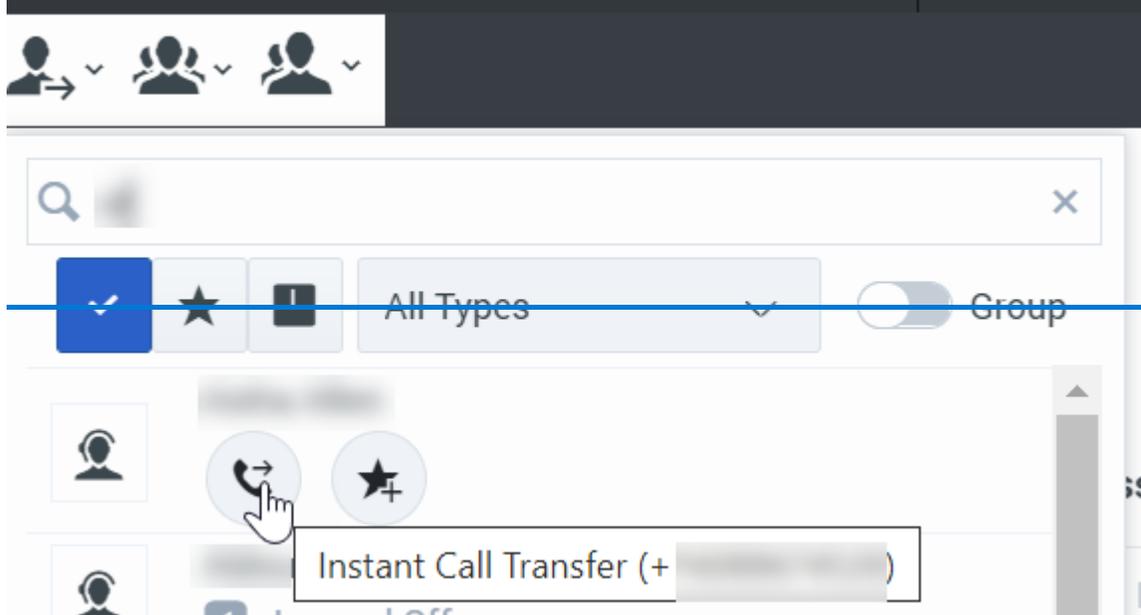
To do an instant transfer:

1. Select **Instant Transfer**.



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

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



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

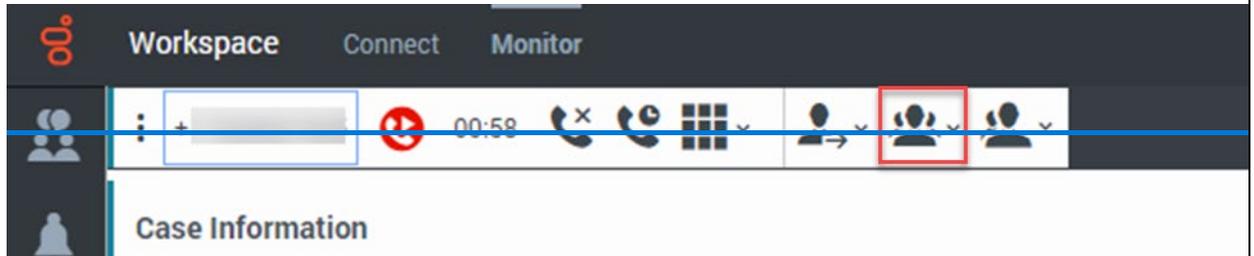
5.4.2 Instant Conference

(Video instructions available: [Instant Conference](#))

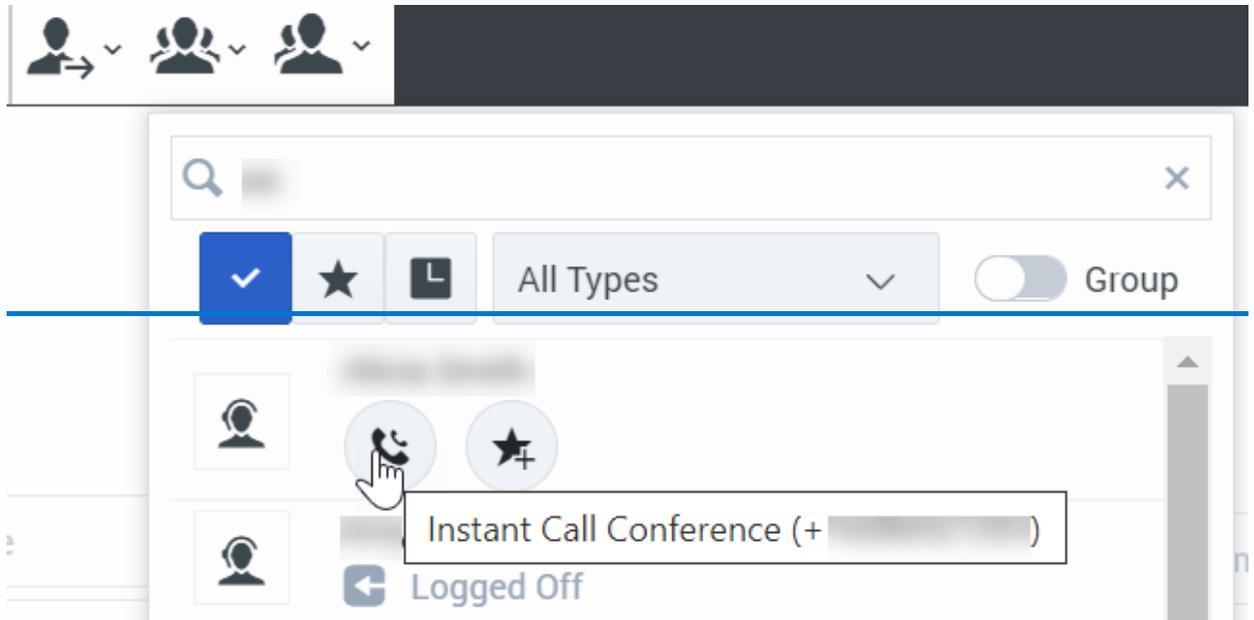
An instant conference is when a second agent is added by the first agent to a call.

To do an instant conference:

1. Select **Instant Conference**.



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



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

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

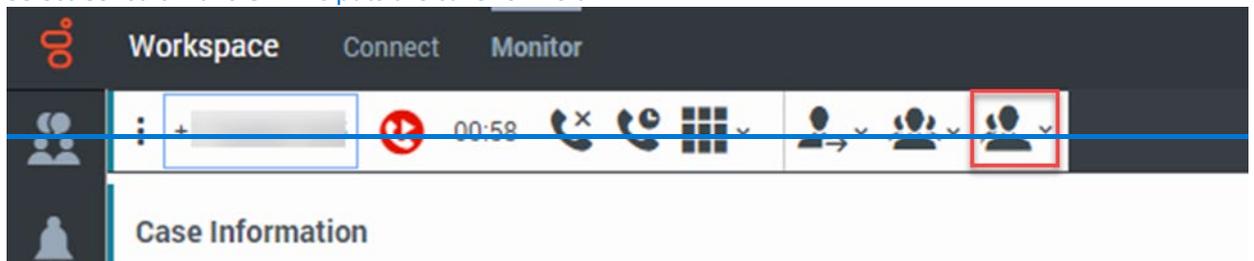
5.4.3 Consult Call

(Video instructions available: [Consult Call](#))

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

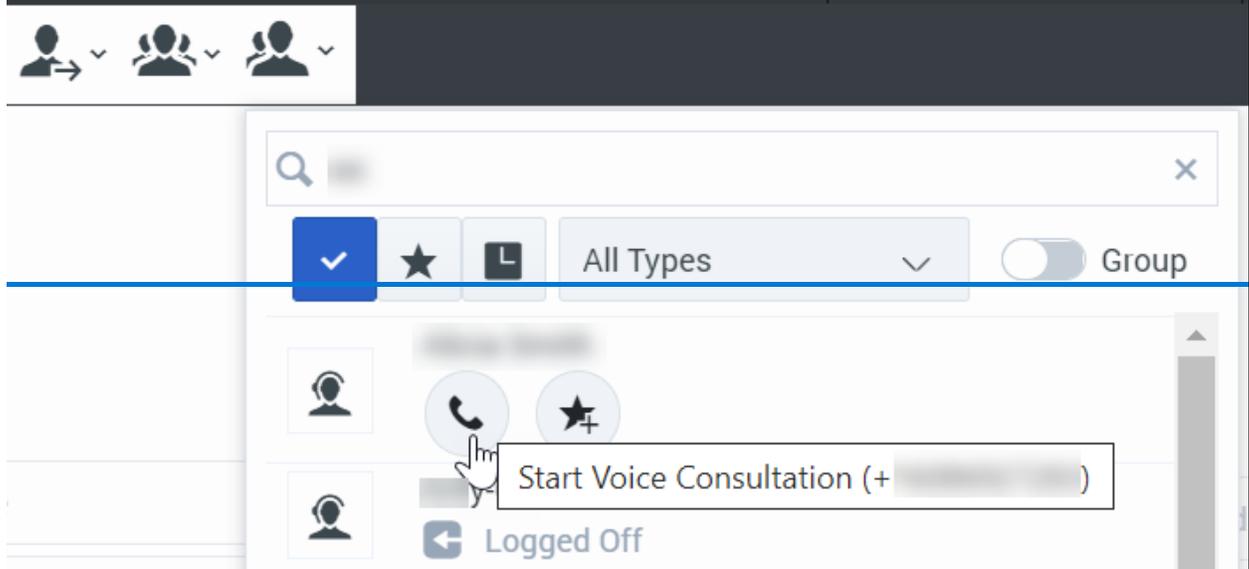
To do a consult call:

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

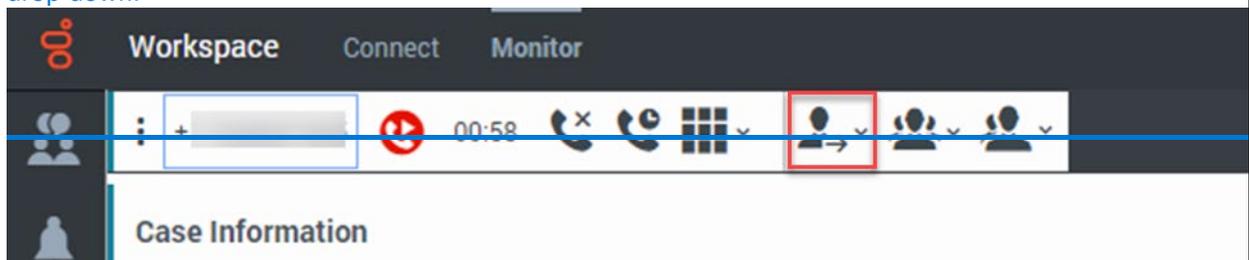


2. Type the 10-digit phone number or name of the second agent in the drop-down menu.

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



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



6 Voicemail

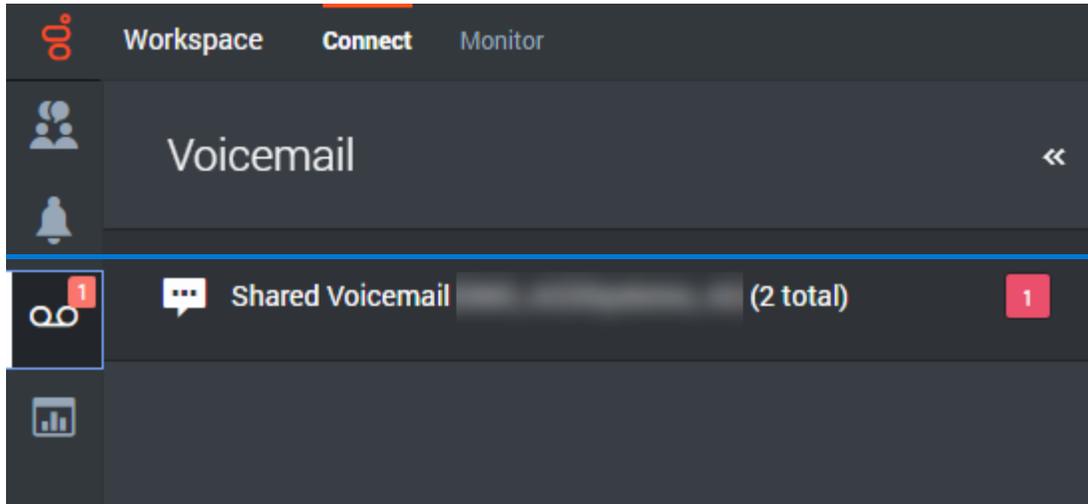
6.1 Retrieving and Deleting a Voicemail (Video instructions available: [Retrieving and Deleting a Voicemail](#))

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

6.1 Retrieving and Deleting a Voicemail

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

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



To retrieve a voicemail:

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

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

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

7 Supervisors

[7.1 Call Supervision](#)

[7.2 Quality Management](#)

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

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

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



7.1 Call Supervision

[7.1.1 Logging in to Supervise Calls](#)

[7.1.2 Monitoring](#)

[7.1.3 Barging](#)

[7.1.4 Coaching](#)

[7.1.5 Logging an Agent Off \(Video instructions available: \[Logging an Agent Off\]\(#\)\)](#)

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

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

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

Tab	Function
Dashboard	<ul style="list-style-type: none"> 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	<ul style="list-style-type: none"> Displays the agents assigned to the supervisor and their current status

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

7.1.1 Logging in to Supervise Calls

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

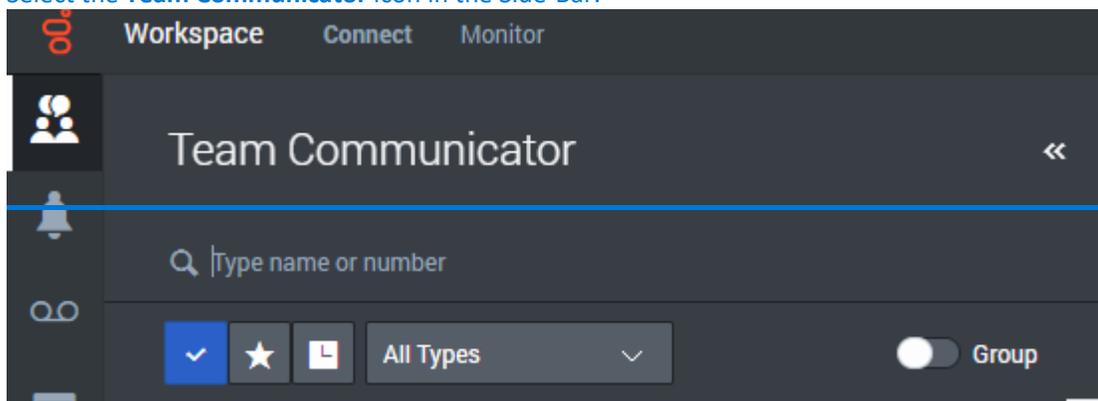
7.1.2 Monitoring

(Video instructions available: [Monitoring](#))

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

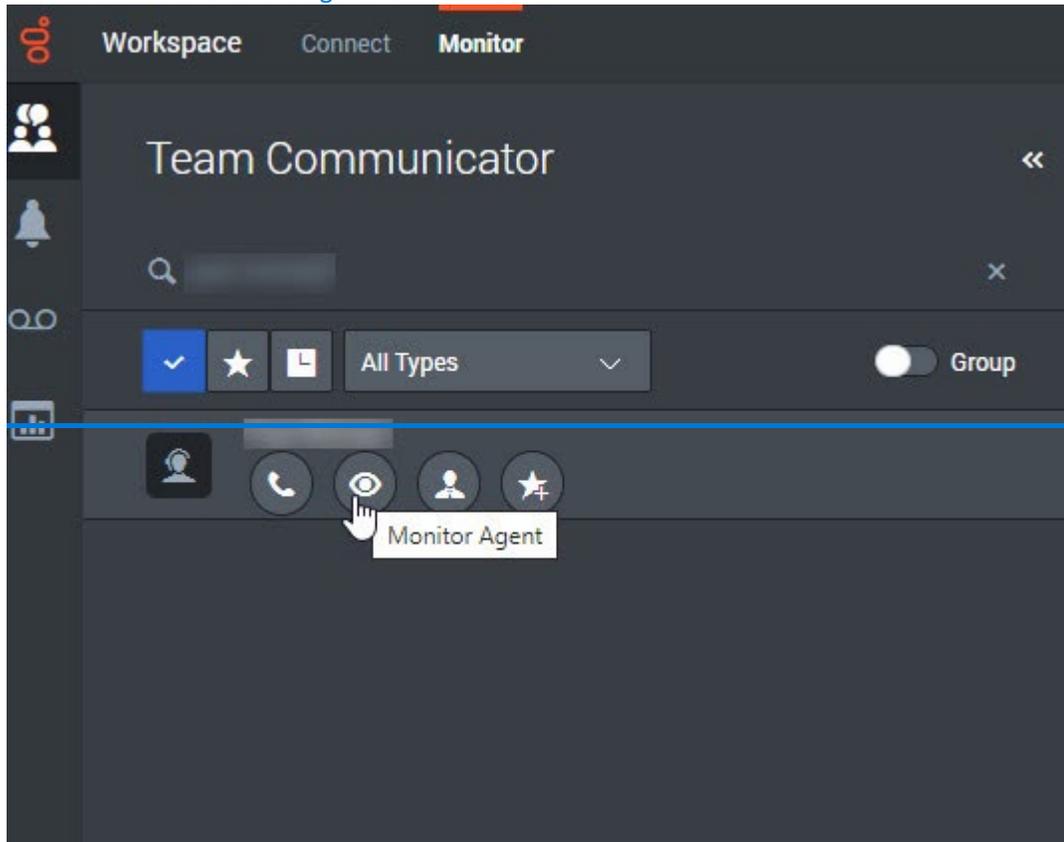
To monitor a call:

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



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

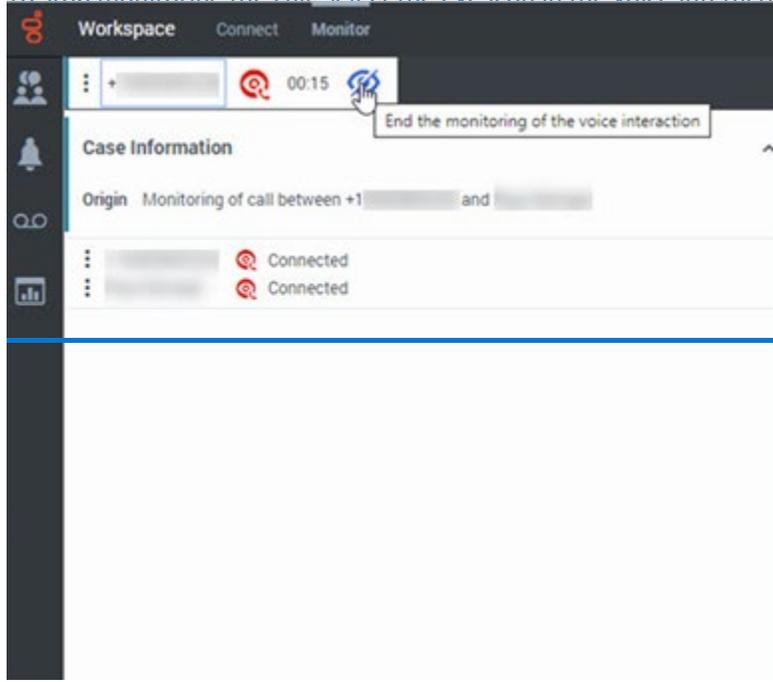
3. Select the eye icon to monitor the agent. While this icon is selected, the supervisor receives a notification whenever the agent receives a call.



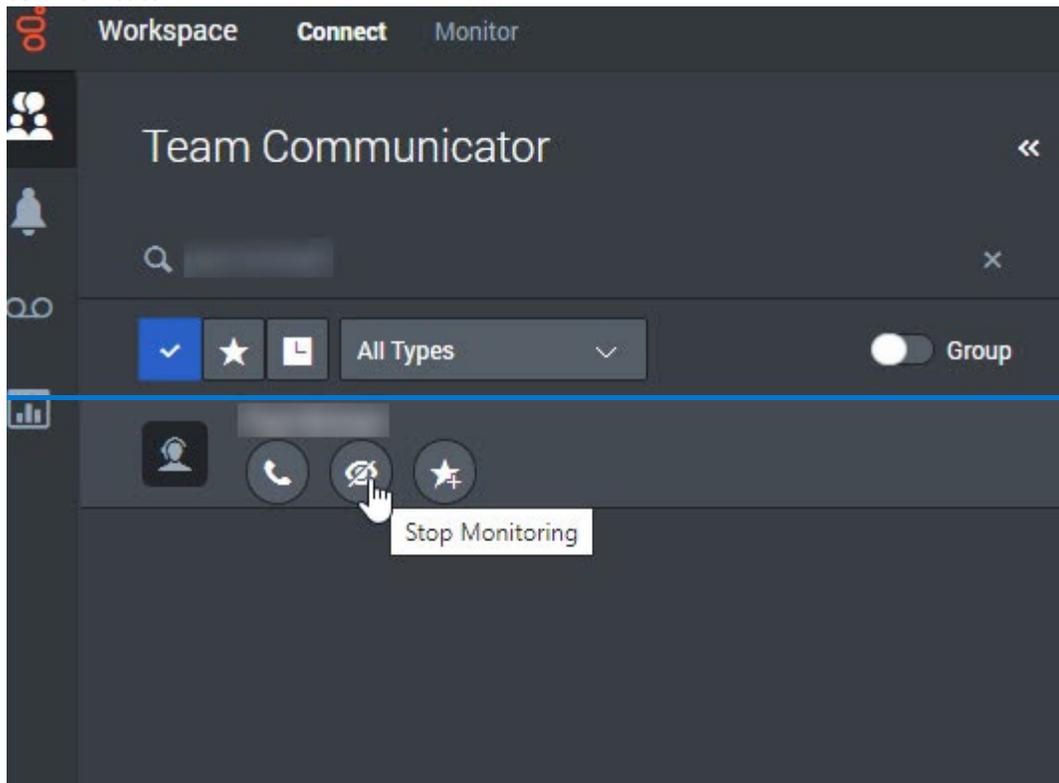
4. When the agent receives a call, the supervisor also receives a call. Accept the call to begin monitoring the agent. If the supervisor doesn't accept the call, the notification disappears.

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

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



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



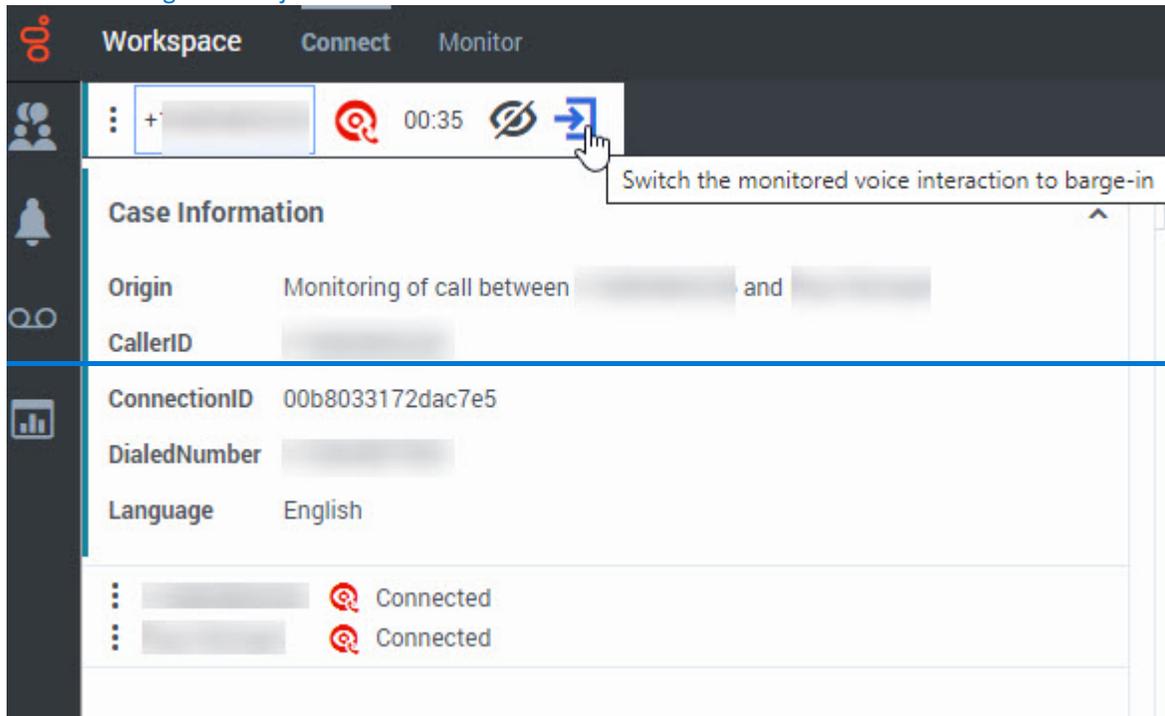
7.1.3 Barging

(Video instructions available: [Barging](#))

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

To use barge and join a call:

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



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

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

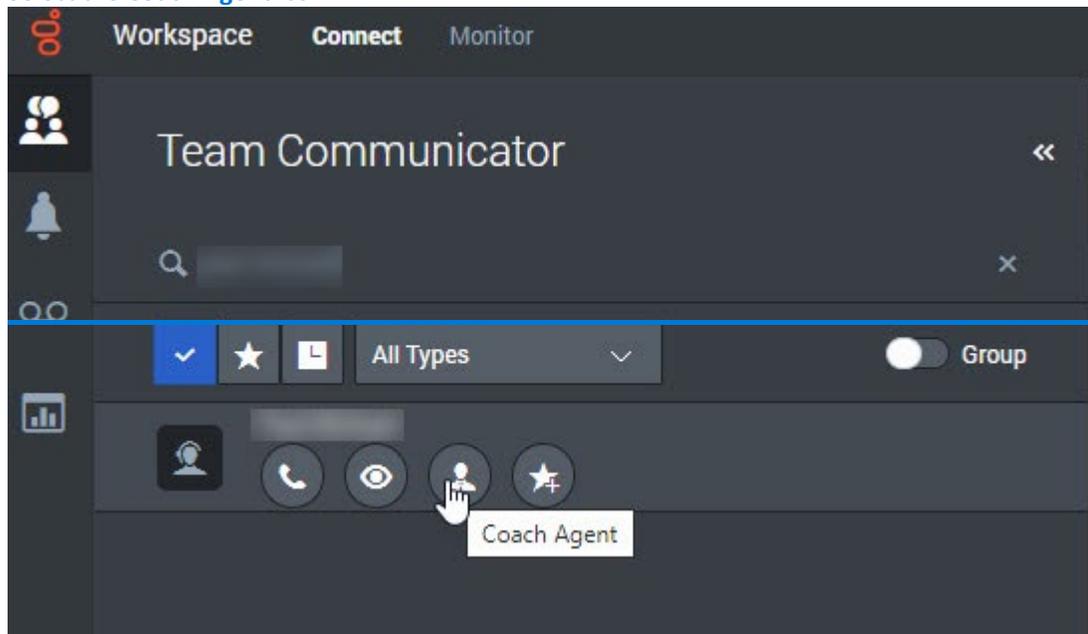
7.1.4 Coaching

(Video instructions available: [Coaching](#))

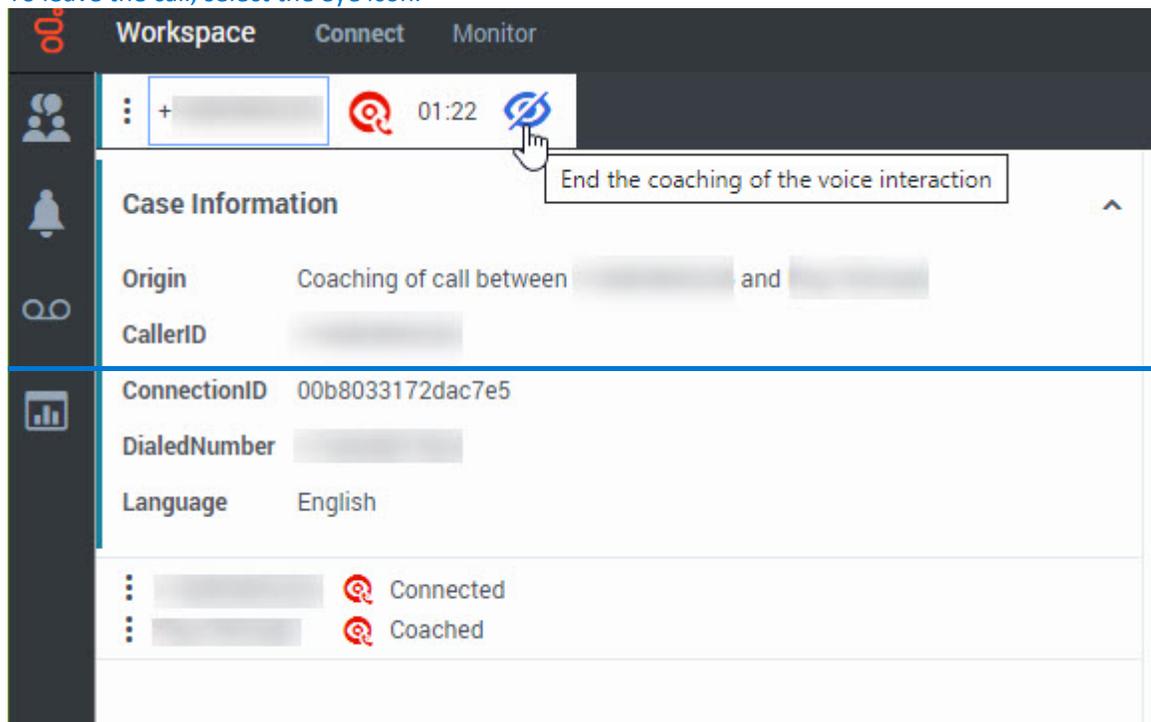
Coaching is when the supervisor speaks to the agent during the call, but the caller can't hear the supervisor. Some examples include when an agent is new or when an agent needs assistance on a call. The agent sees the supervisor as one of the parties in the call if they are being coached.

To coach an agent on a call:

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



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



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

7.1.5 Logging an Agent Off

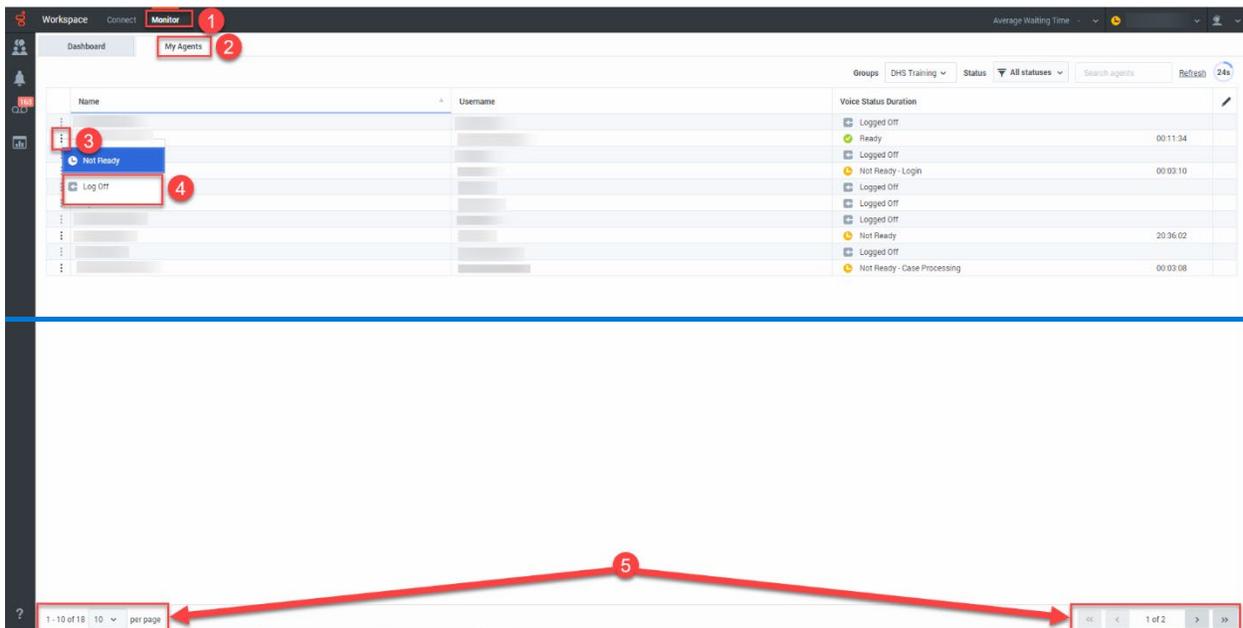
(Video instructions available: [Logging an Agent Off](#))

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

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

To log an agent off:

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



7.2 Quality Management

7.2.1 Logging in for Quality Management

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

7.2.3 Telephonic Signature Recording Missing in ECF

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

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

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

7.2.1 Logging in for Quality Management

(Video instructions available: [Logging in for Quality Management](#))

Quality management tasks take place in Interaction Recording.

To log in and begin quality management:

1. Open the [Genesys Portal](#) with Firefox, Edge, or Chrome.
2. Select **Interaction Recording** to open the login screen.



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

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



SpeechMiner

Log in to Genesys

Genesys 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. [Search by Date](#)
2. [Search by Agent Name](#)
3. [Search by Call Type](#)
4. [Search by Caller Phone Number](#)

5. [Search by ConnectionID](#)

6. [Search by Number of Segments](#)

7. [Search by Call Duration](#)

(Video instructions available: [Searching for Calls](#))

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

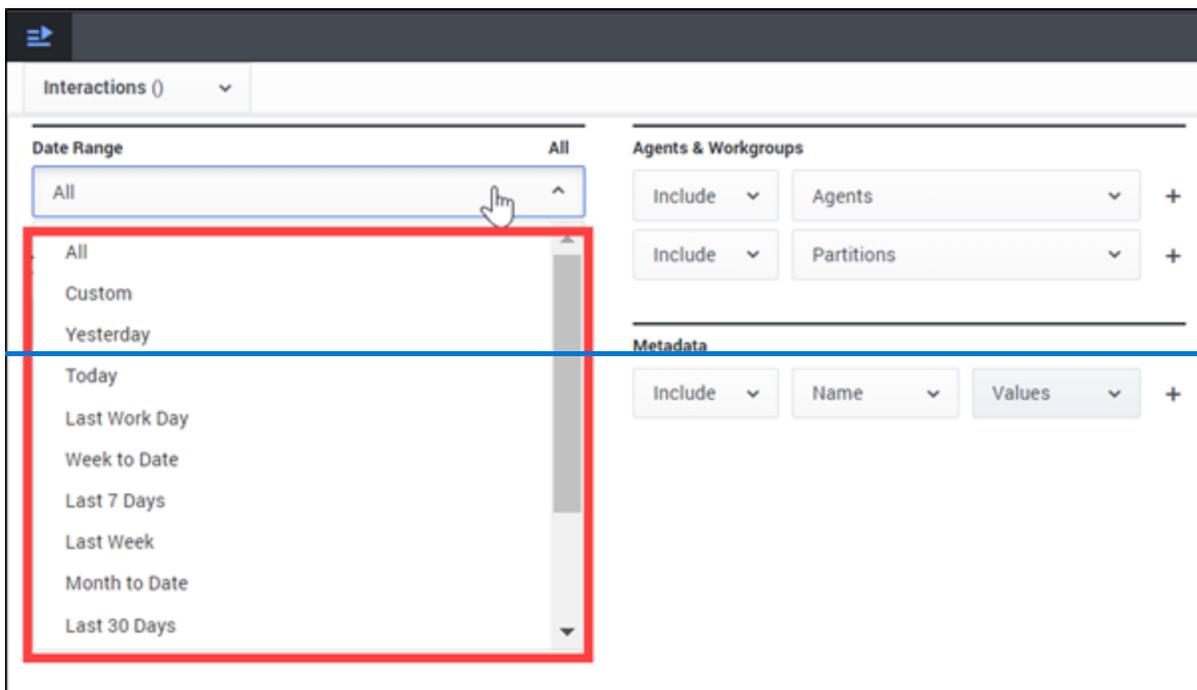
- [Date](#)
- [Agent name](#)
- [Consortia](#)
- [Call type \(inbound or outbound\)](#)
- [Phone number of the caller](#)
- [ConnectionID](#)
- [Number of segments](#)
- [Call duration](#)

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

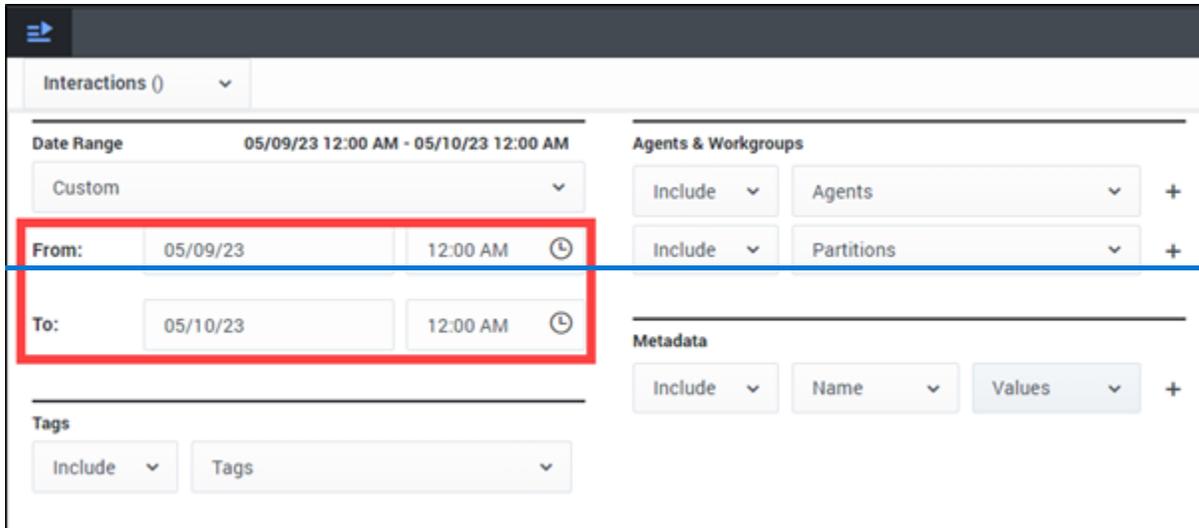


Search by Date

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

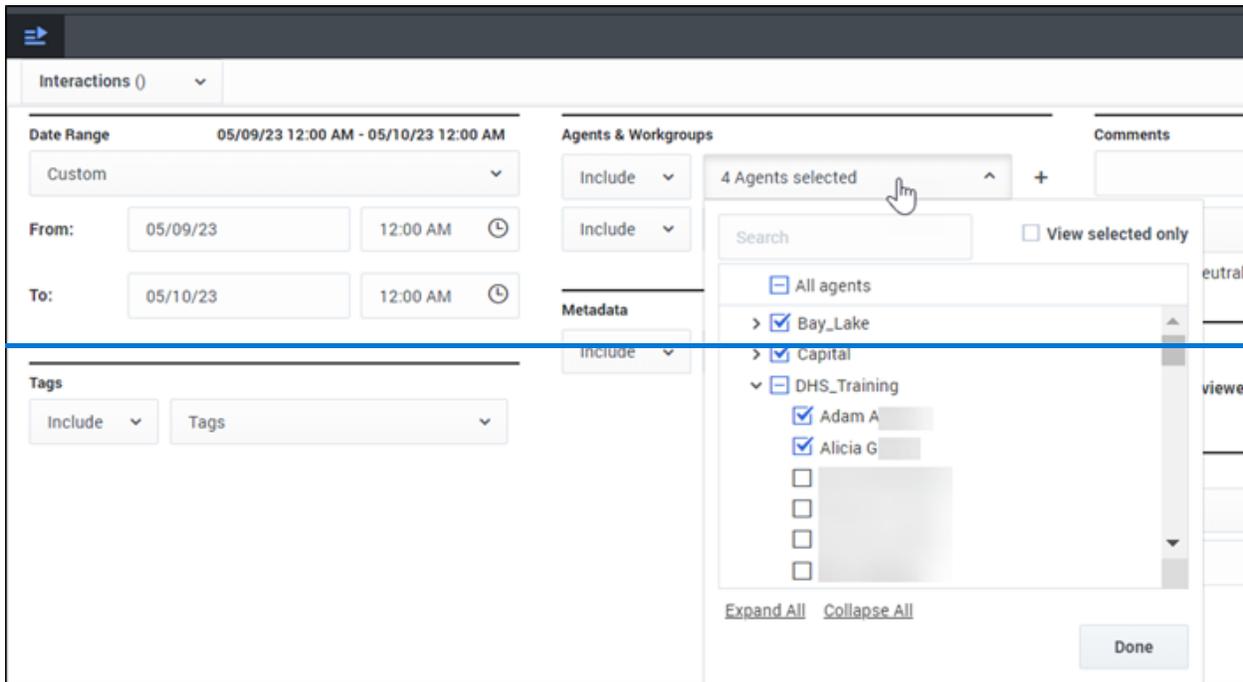


Choose **Custom** to display From and To fields and enter your own range of dates and times.



Search by Agent Name

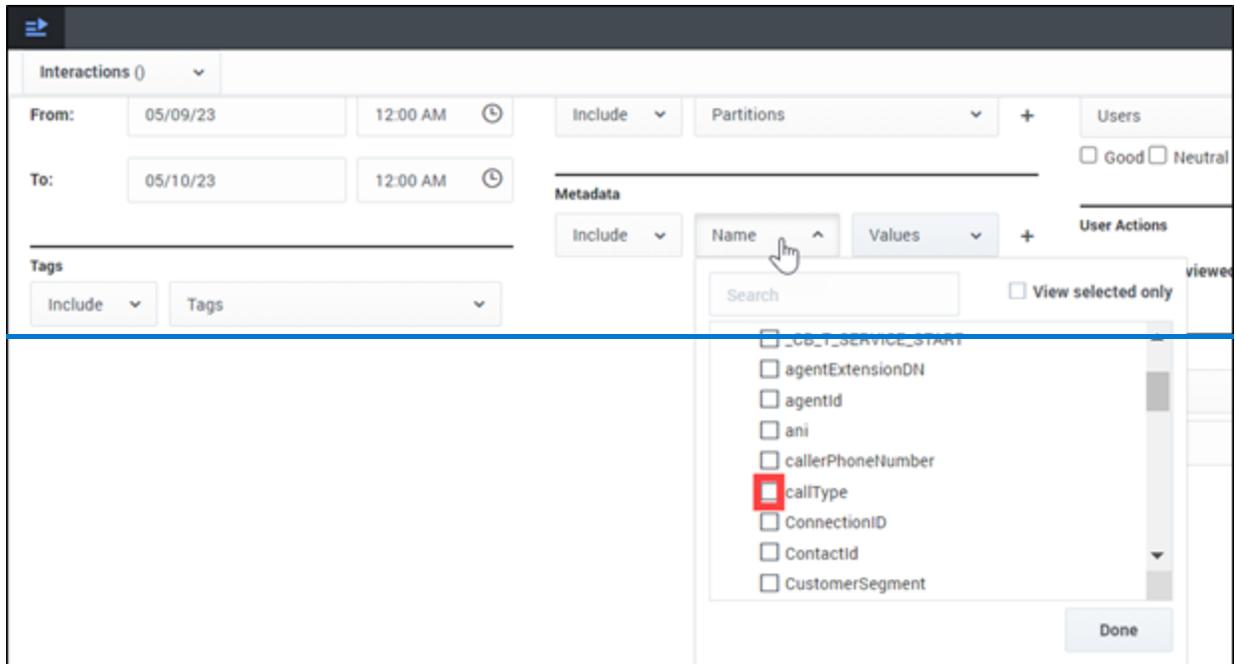
To search by agent name, select a name from a **consortium folder** in the Agents & Workgroups section. Multiple agents can be selected one-by-one, as a consortium, or as multiple consortia.



Search by Call Type

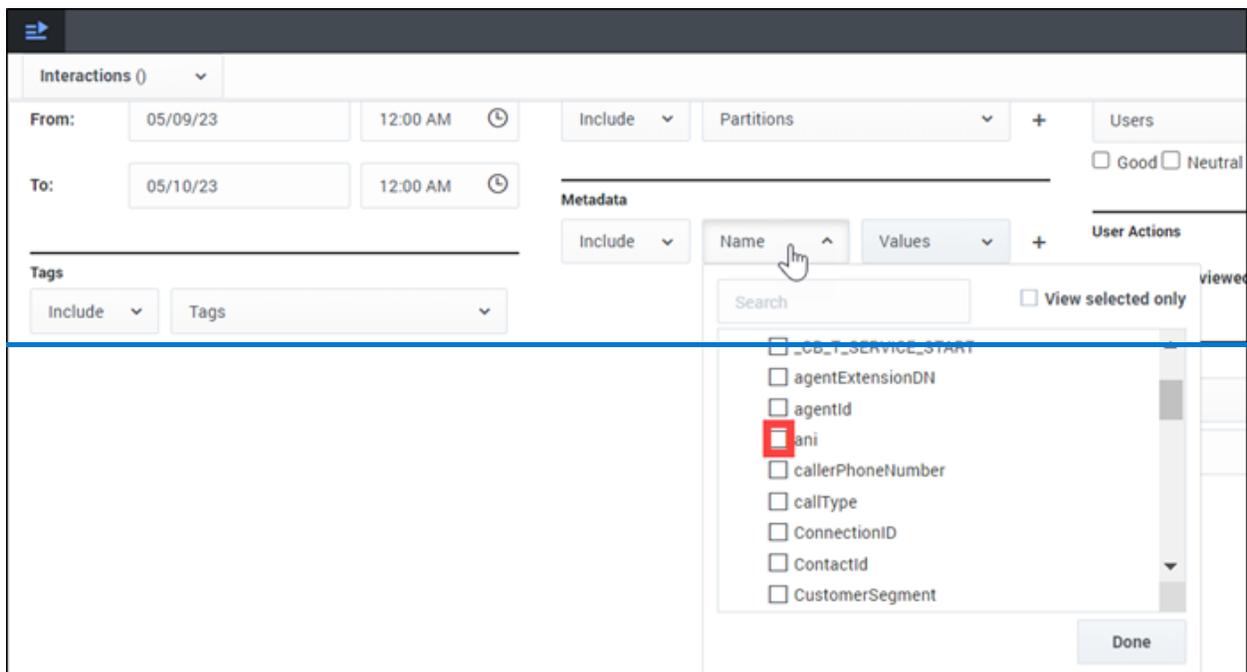
To search by the inbound or outbound call type, select **callType** from the **Name** drop-down menu in the Metadata section.

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



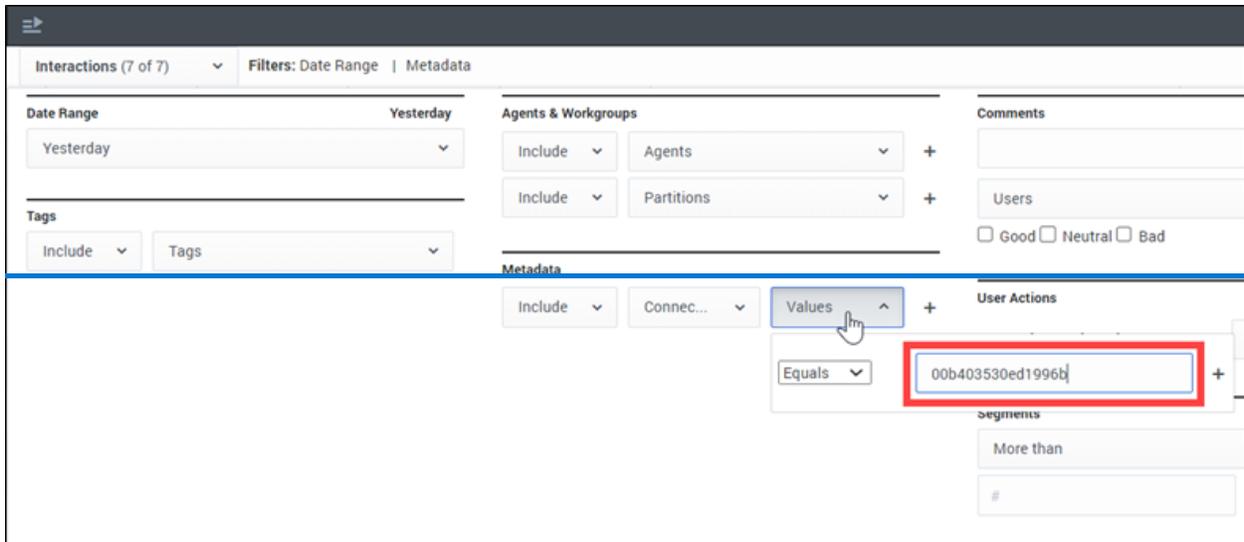
Search by Caller Phone Number

To search by the caller's phone number, select **ani** from the **Name** drop-down menu in the Metadata section. Then select **Values** and enter the phone number. Be sure to add **+1** at the start of the phone number. For example: **+16081234567**.



Search by ConnectionID

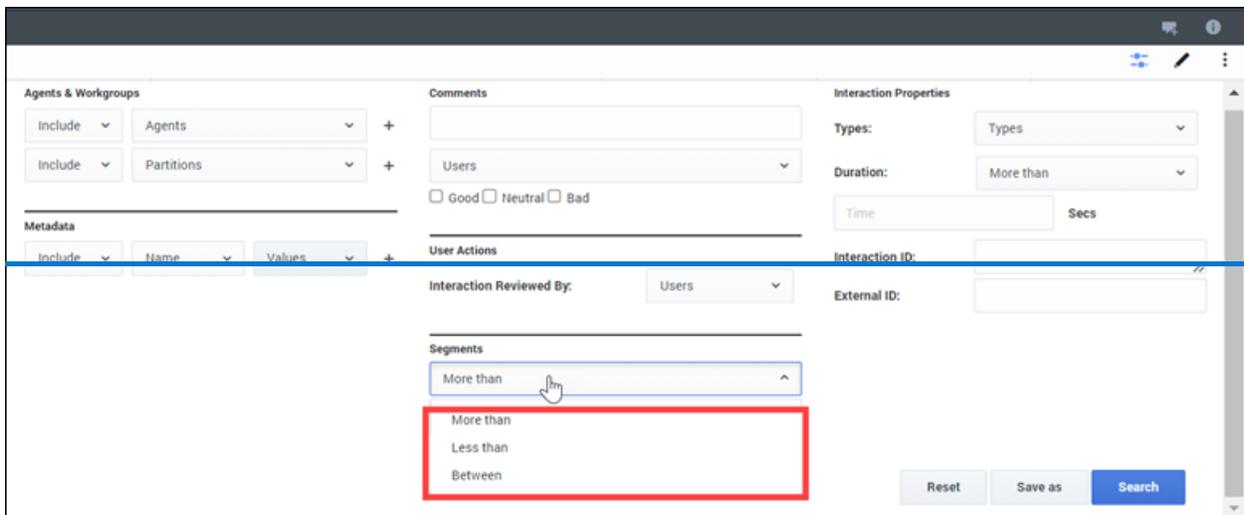
To search by ConnectionID, select **ConnectionID** from the **Name** drop-down menu in the Metadata section. Then select **Values** and copy and paste the **ConnectionID**.



Search by Number of Segments

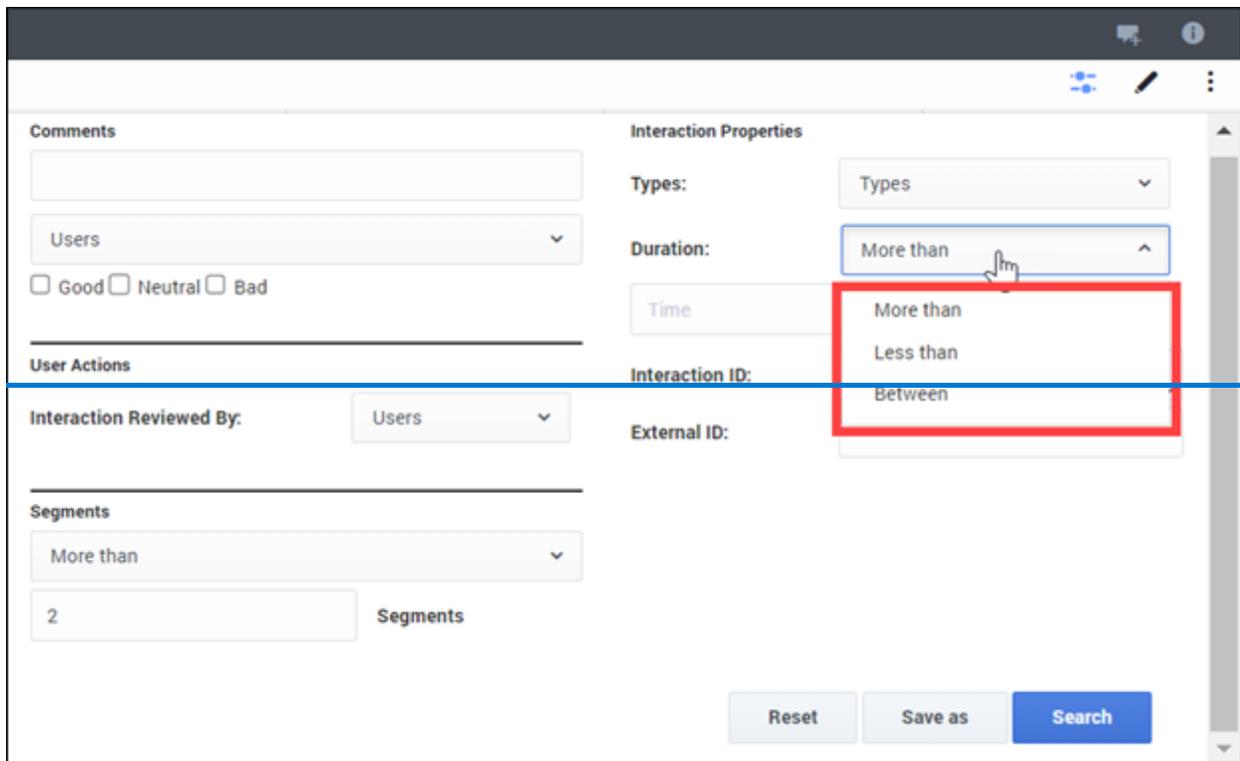
To search by number of call segments, select **More than**, **Less than**, or **Between** from the Segments section drop-down menu. Then enter the number of segments in the **Segments** field.

Examples of call segments include ATS signature and call transfers.



Search by Call Duration

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



[7.2.2.2 Sorting Results and Listening to Calls](#)

- [1. Sorting Results](#)
- [2. Adjusting Search Criteria](#)
- [3. Listening to Calls](#)

(Video instructions available: [Sorting Results and Listening to Calls](#))

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

Sorting Results

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

A screenshot of a data table interface. The table has two columns: 'External ID' and 'callType'. The 'callType' column header is highlighted with a red rectangular box. The table contains several rows of data, with the second row highlighted in blue. The data in the 'callType' column is consistently 'Outbound'.

External ID	callType
01M8LBI688A3F9204C1702LAES009N1L	Outbound
01M8LBI688A3F9204C1702LAES009N1L_2023-05-16_23-59-44	
01M8LBI688A3F9204C1702LAES009N1K	Outbound
01M8LBI688A3F9204C1702LAES009N1J	Outbound
01M8LBI688A3F9204C1702LAES009N1H	Outbound
01M8LBI688A3F9204C1702LAES009N1G	Outbound
01M8LBI688A3F9204C1702LAES009N1C	Outbound
01M8LBI688A3F9204C1702LAES009N1D	Outbound
01M8LBI688A3F9204C1702LAES009N1A	Outbound

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

A screenshot of the same data table interface as above. In this view, the 'Select Columns' icon, which is a pencil inside a square, is highlighted with a red rectangular box in the top right corner of the table's header area. The rest of the table content is identical to the previous screenshot.

External ID	callType
01M8LBI688A3F9204C1702LAES009N1L	Outbound
01M8LBI688A3F9204C1702LAES009N1L_2023-05-16_23-59-44	
01M8LBI688A3F9204C1702LAES009N1K	Outbound
01M8LBI688A3F9204C1702LAES009N1J	Outbound
01M8LBI688A3F9204C1702LAES009N1H	Outbound
01M8LBI688A3F9204C1702LAES009N1G	Outbound
01M8LBI688A3F9204C1702LAES009N1C	Outbound
01M8LBI688A3F9204C1702LAES009N1D	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	<input checked="" type="checkbox"/> Workgroup <input checked="" type="checkbox"/> Tags <input checked="" type="checkbox"/> Duration <input type="checkbox"/> Text <input checked="" type="checkbox"/> Interaction ID <input checked="" type="checkbox"/> External ID <input type="checkbox"/> agentExtensionDN <input type="checkbox"/> agentId <input type="checkbox"/> ani <input type="checkbox"/> callerPhoneNumber <input checked="" type="checkbox"/> callType <input type="checkbox"/> ConnectionID <input type="checkbox"/> CustomerSegment <input type="checkbox"/> dialedPhoneNumber <input type="checkbox"/> dnis <input type="checkbox"/> GSYS_IVR <input type="checkbox"/> IApplication <input type="checkbox"/> ivr_language
01M8LBI688A3F9204C1702LAES009N1L	
01M8LBI688A3F9204C1702LAES009N1L_2023-05-16_23-59	
01M8LBI688A3F9204C1702LAES009N1K	
01M8LBI688A3F9204C1702LAES009N1J	
01M8LBI688A3F9204C1702LAES009N1H	
01M8LBI688A3F9204C1702LAES009N1G	
01M8LBI688A3F9204C1702LAES009N1C	
01M8LBI688A3F9204C1702LAES009N1D	
01M8LBI688A3F9204C1702LAES009N1A	

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

Interactions (1,000 of 11,818)		Filters: Date Range			
Date / Time	Media	Agent	Workgroup	Tags	
05/16/23 06:59 PM			Milwaukee		
05/16/23 06:59 PM			Milwaukee		
05/16/23 06:59 PM			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.

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.

#	<input type="checkbox"/>	Date / Time	Media
1	<input type="checkbox"/>	05/16/23 06:59 PM	
2	<input type="checkbox"/>	05/16/23 06:59 PM	
3	<input type="checkbox"/>	05/16/23 06:58 PM	
4	<input type="checkbox"/>	05/16/23 06:58 PM	

7.2.2.3 Saving Searches

1. [Saving a Search](#)
2. [Viewing Saved Searches](#)
3. [Running Saved Searches](#)
4. [Editing Saved Searches](#)
5. [Deleting a Saved Search](#)

(Video instructions available: [Saving Searches](#))

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

Saving a Search

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

User Actions

Interaction Reviewed By: Interaction ID:

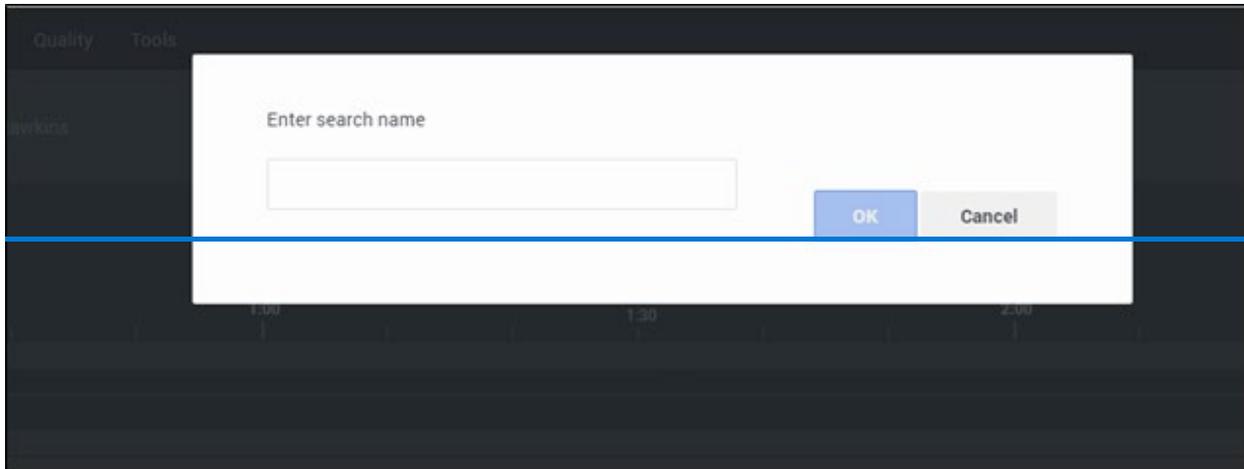
External ID:

Segments

Segments

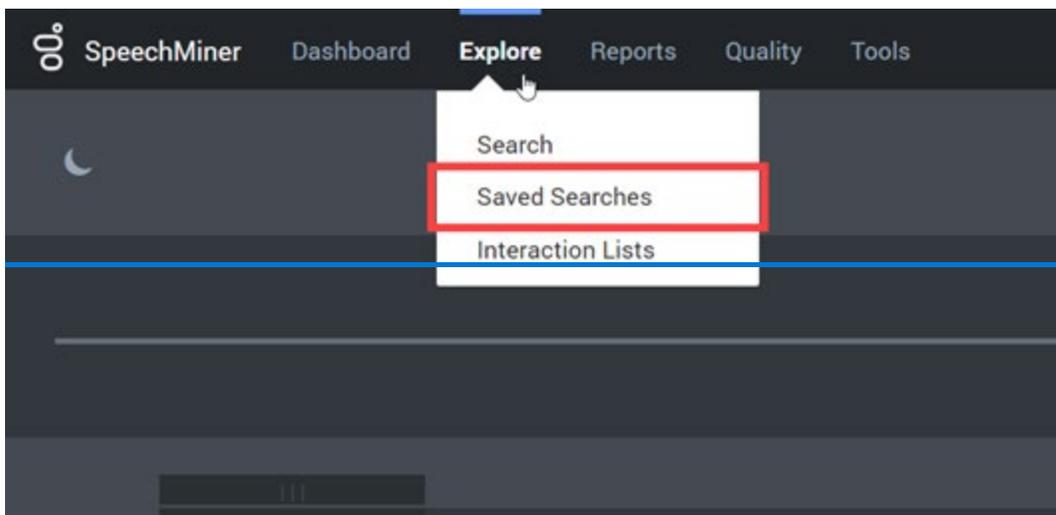
Segments

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



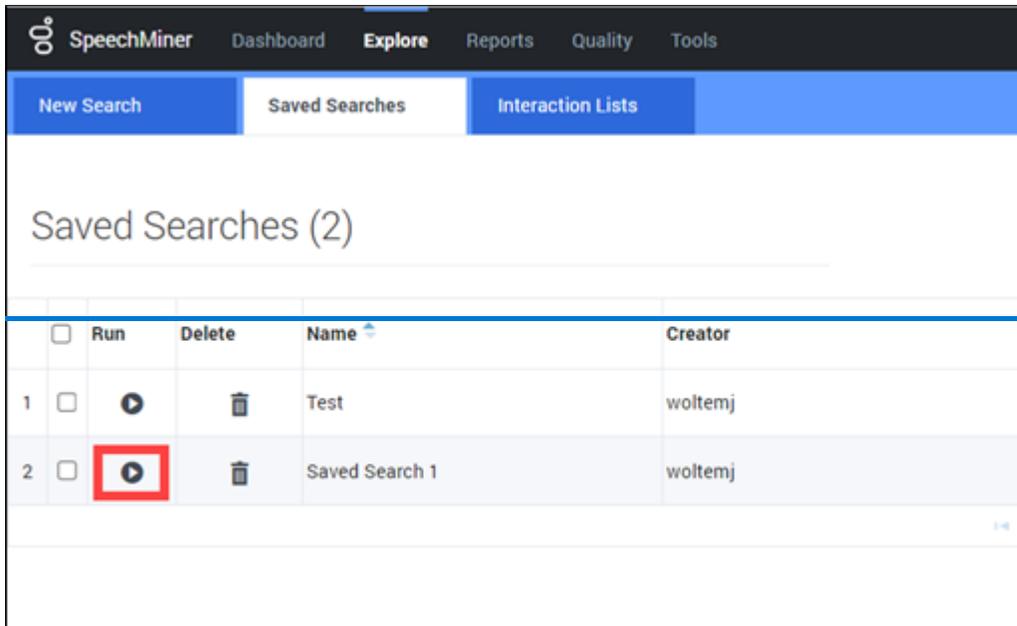
Viewing Saved Searches

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



Running Saved Searches

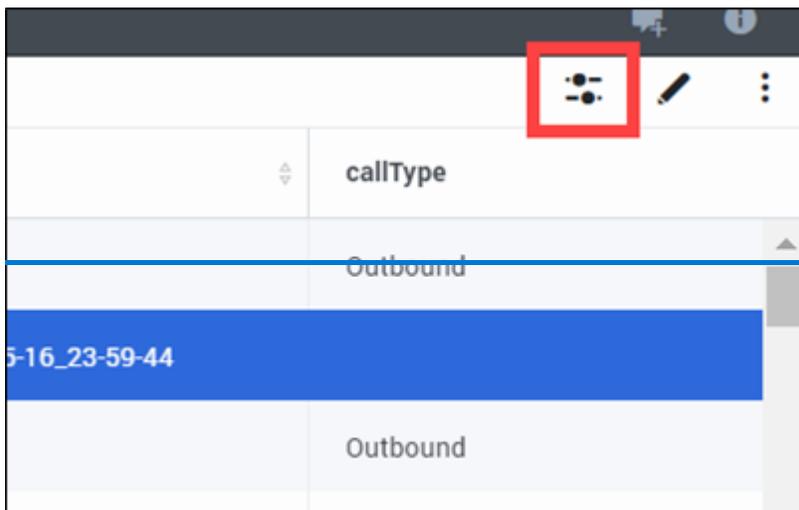
To run a saved search, use the play button next to the search on the Saved Searches page.



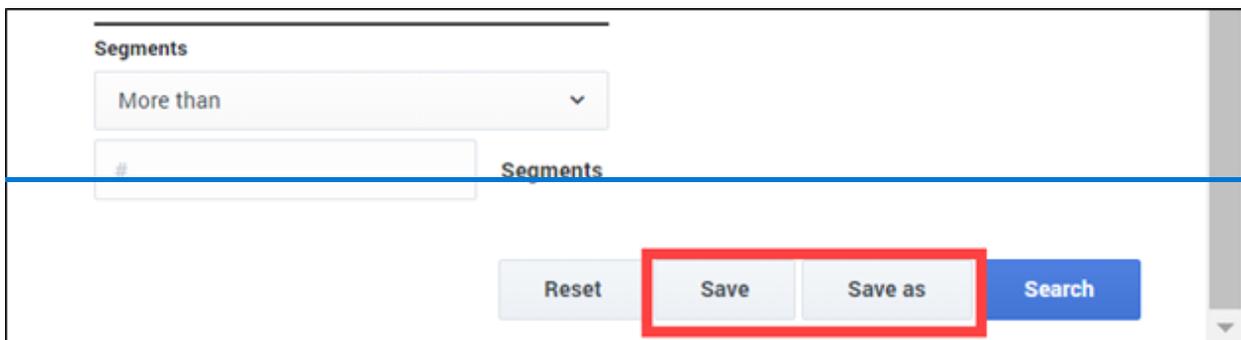
Editing Saved Searches

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

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

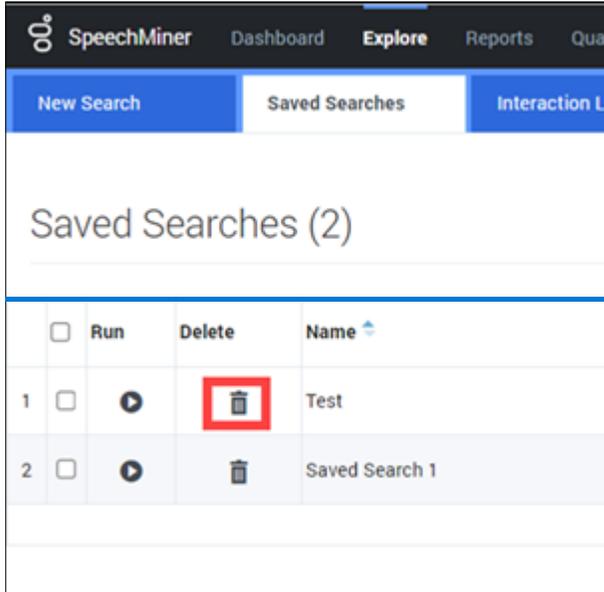


Make any necessary changes, then select **Save** to update the saved search or **Save as** create a new saved search.



Deleting a Saved Search

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



7.2.3 Telephonic Signature Recording Missing In The ECF

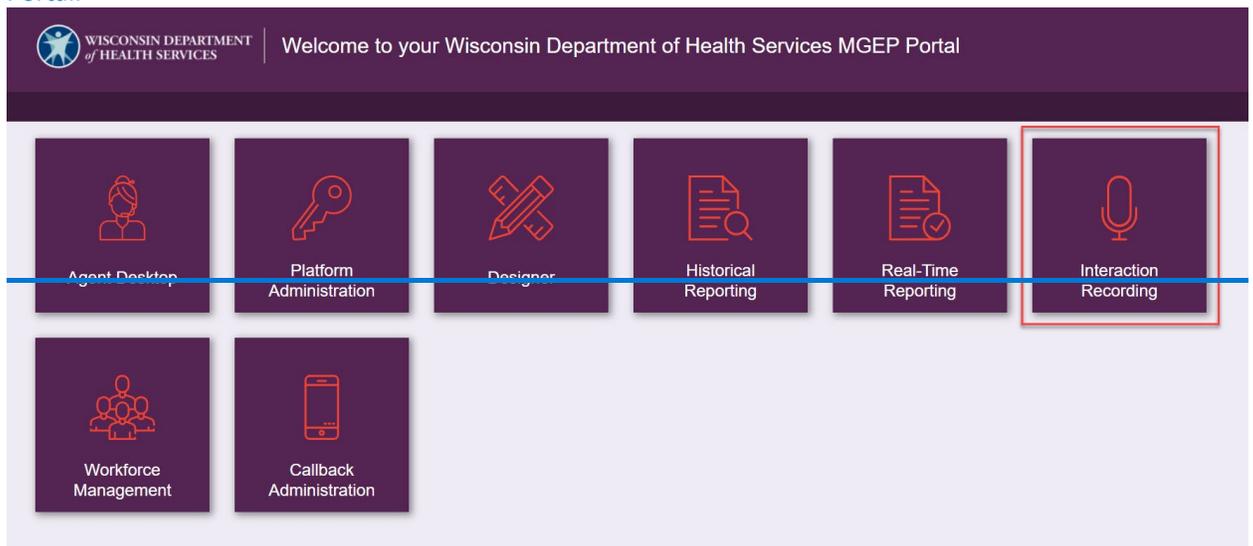
(Video instructions available: [Download the Call](#) and [Upload the Call to the ECF](#))

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

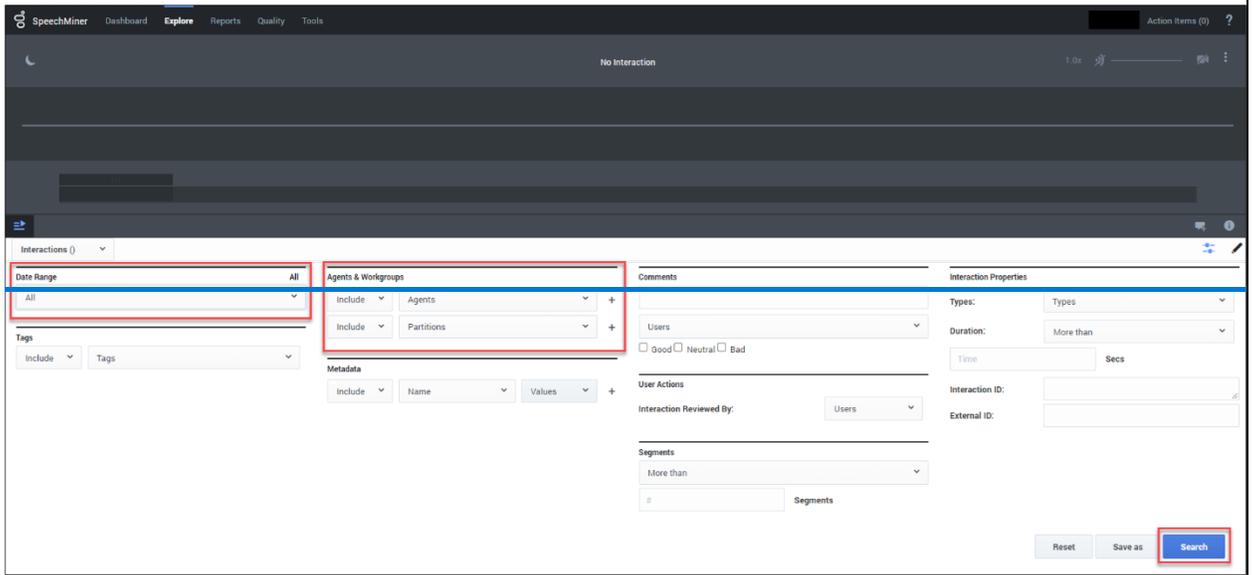
Note: Compression software (such as WinZIP) is required to complete this process. Contact your local IT department if compression software is not installed.

To download the call:-

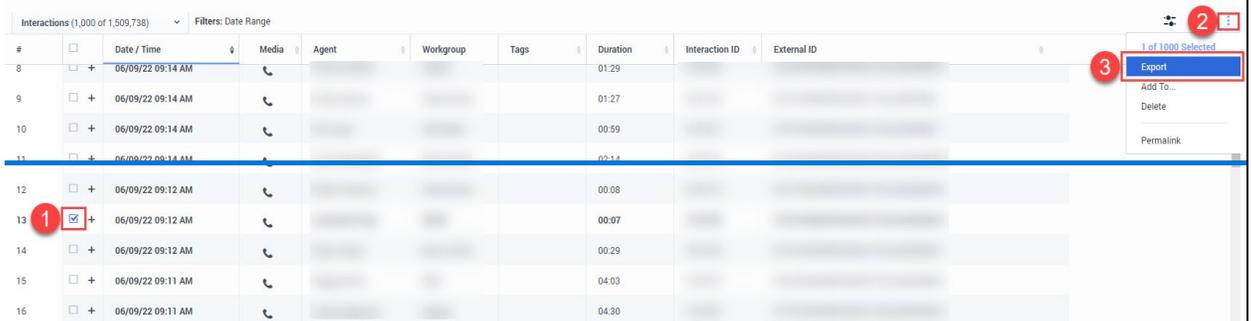
1. The person with supervisor access opens the **Interaction Recording** application within the Genesys Portal.



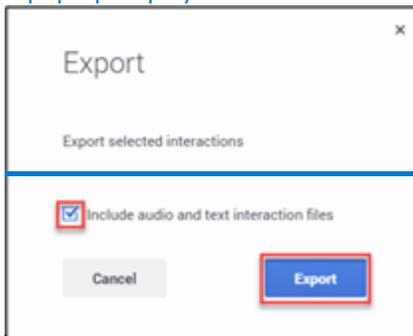
- Open the Explore Tab and begin searching by using the “Date Range” or “Agent” filters. Select **Search**.



- Go through the recordings to find the one of interest. If the call is not found after searching, the recording may not exist.
- To download the call, check the box next to the call.
- Select the three dots in the top right corner and select **Export**.

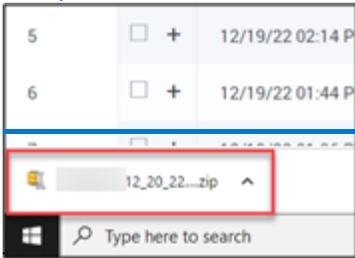


- A pop-up displays. Check the box **Include audio and text interaction files** and select **Export**.



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

IT department.



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

~~8 Segment Administrators~~

~~8.1 Managing User Accounts~~

~~8.2 Business Controls~~

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

- Adding agent skills
- Agent groups
- Business controls

~~8.1 Managing User Accounts~~

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

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

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

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

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

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

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

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

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

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

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

~~8.1.1 Logging in to Manage User Accounts~~

(Video instructions available: [Logging in to Manage User Accounts](#))

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

1. Open the [Genesys Portal](#) with Firefox, Edge, or Chrome.

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



3.—Enter your WAMS ID and local password.

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

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

- Accounts
- Routing/Digital
- Environment
- Switching

8.1.2 Setting a Skill for an Agent

(Video instructions available: [Setting a Skill for an Agent](#))

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

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

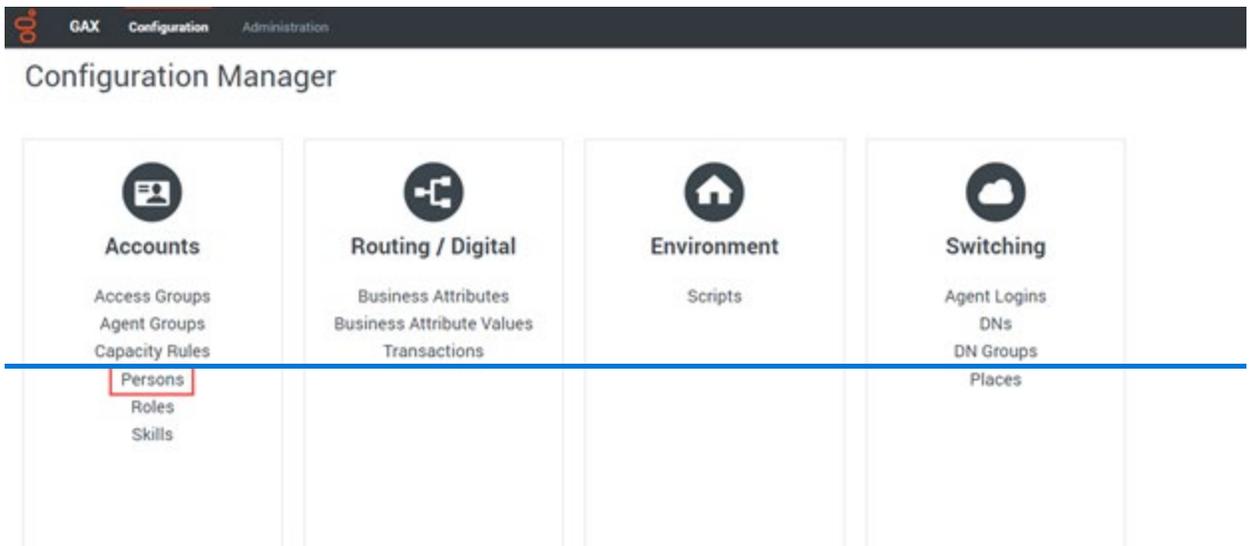
Note: Agents are either skilled at 0 or 10.

To assign a skill to an agent:

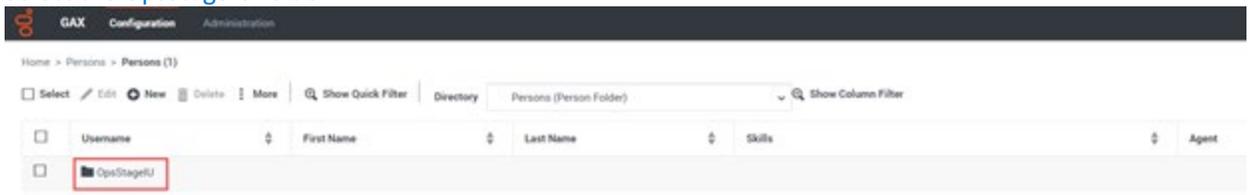
1. Select the Persons link under the accounts section on the Configuration Manager page.

Note: To conduct a quick search for an agent, see [Section 8.1.7 Quick Agent Search in Platform Administration](#), then proceed with step number five.

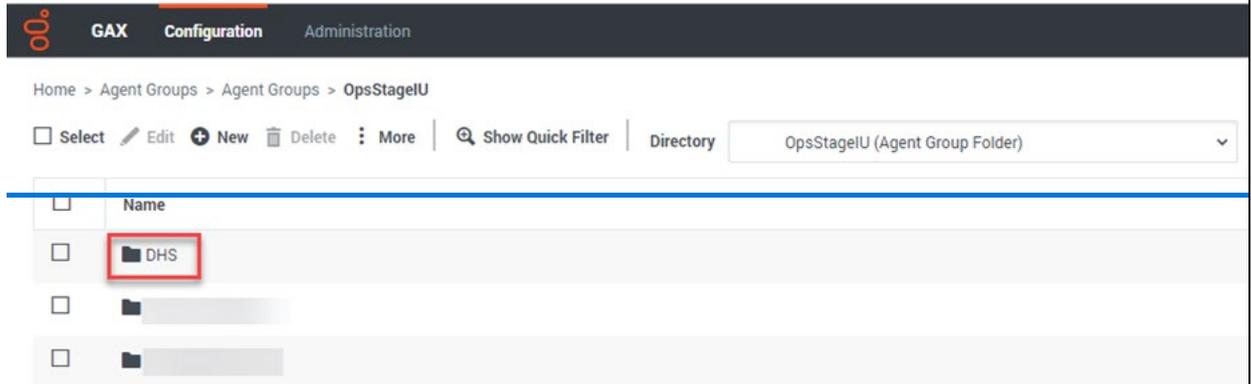
- 2.



3. Select the OpsStageIU folder.

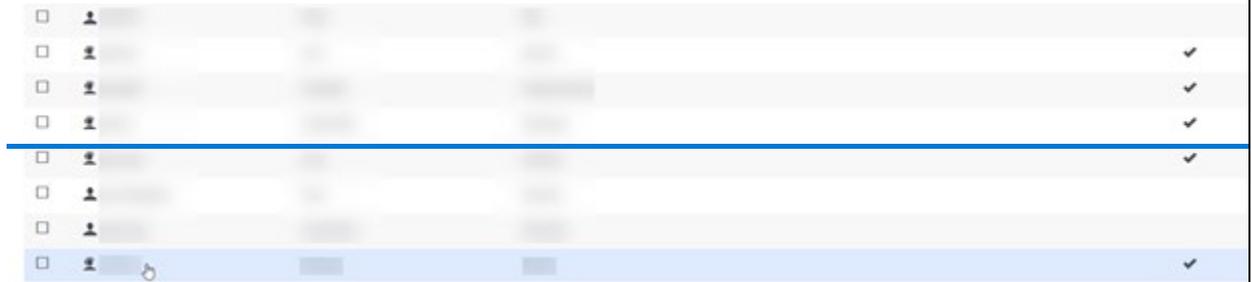


4. Select the DHS folder.



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

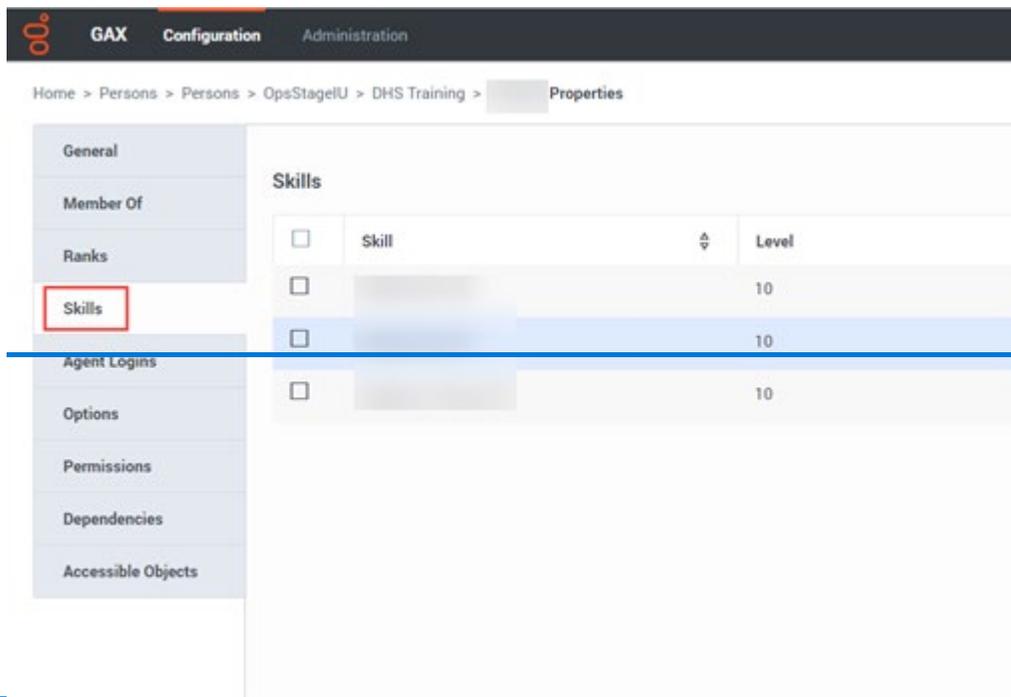
Note: All other lines of business not related to Income Maintenance are in the DMS folder.



6.

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

Note: If you don't see the skill you're looking for, see [Section 8.1.3 Adding a Skill for an Agent](#).



8.

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

10. Click **OK**.

The screenshot shows a 'New' dialog box with a close button (X) in the top right corner. It contains two input fields: 'Skill *' and 'Level'. The 'Skill' field is currently empty, and the 'Level' field contains the number '10'. At the bottom of the dialog, there are two buttons: 'Cancel' and 'OK'. The 'OK' button is highlighted with a red rectangular border.

11. Click **Apply**.

The screenshot shows the 'Properties' page for a person in the 'Skills' section. The page has a navigation breadcrumb: Home > Persons > Persons > OpsStageIU > DHS Training > Properties. There are three action buttons at the top right: Delete Person, Clone, and Move To. The 'Skills' section has an 'Add' button, a 'Remove' button, and a 'More' button. Below these buttons is a table with two columns: 'Skill' and 'Level'. The table contains one row with a checkbox, an empty skill name, and the level '10'. At the bottom of the page, there are three buttons: 'Cancel', 'Apply', and 'Save'. The 'Apply' button is highlighted with a red rectangular border.

Skill	Level
<input type="checkbox"/>	10

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

8.1.3 Adding a Skill for an Agent

(Video instructions available: [Adding a Skill for an Agent](#))

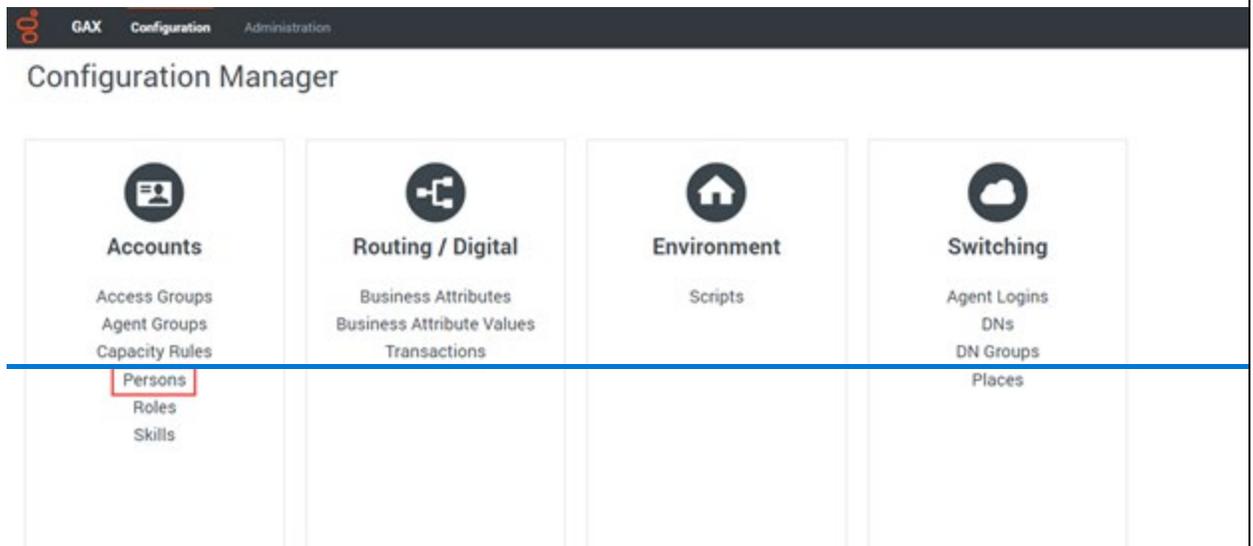
Add a skill for an agent if the skill is missing from the agent's profile.

To add a skill for an agent:

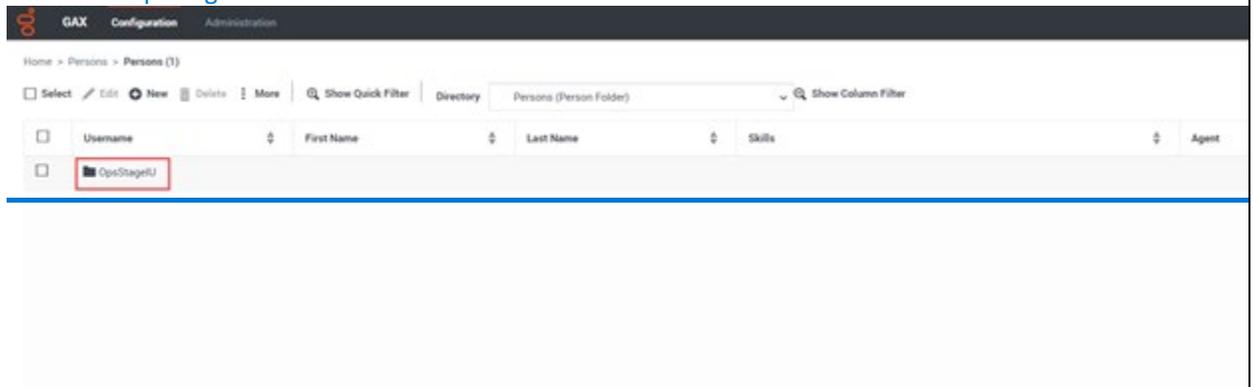
1. Select the **Persons** link under the accounts section on the Configuration Manager page.

Note: To conduct a quick search for an agent, see [Section 8.1.7 Quick Agent Search in Platform Administration](#), then proceed with step number five.

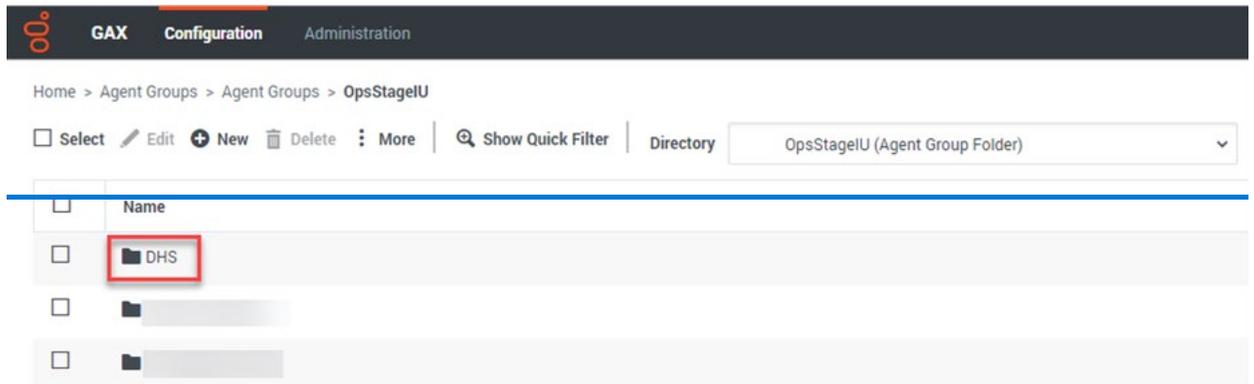
- 2.



3. Select the **OpsStageIU** folder.

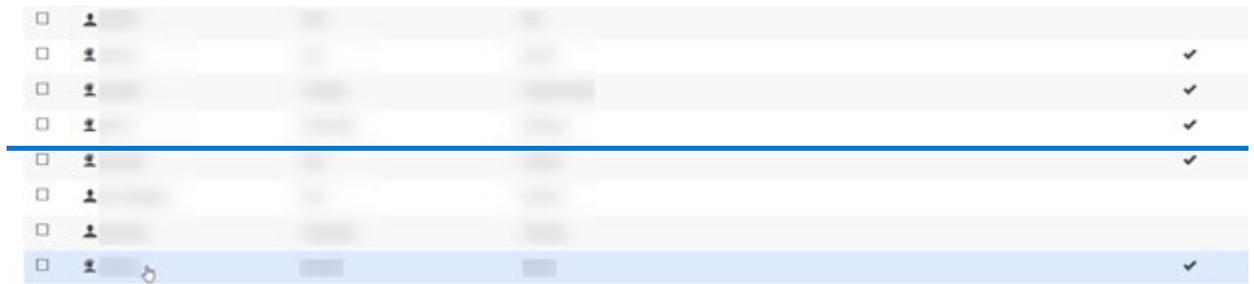


4. Select the DHS folder.



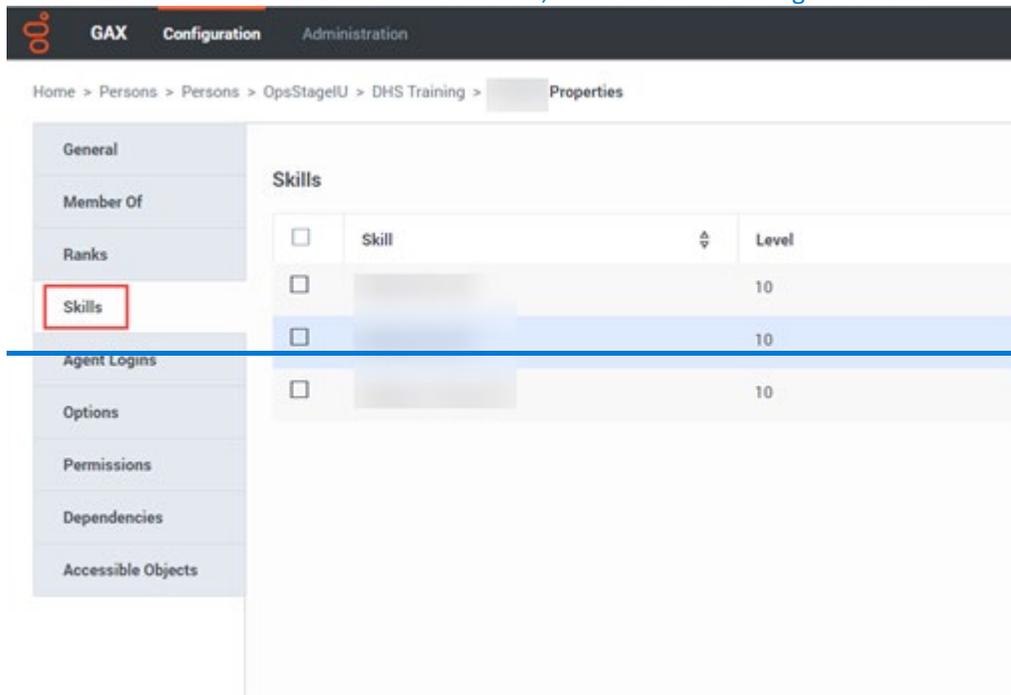
5. Select the DMS folder or the consortium folder the agent is in (Capital, Northern, Milwaukee, etc.) and then select their name to open their profile.

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

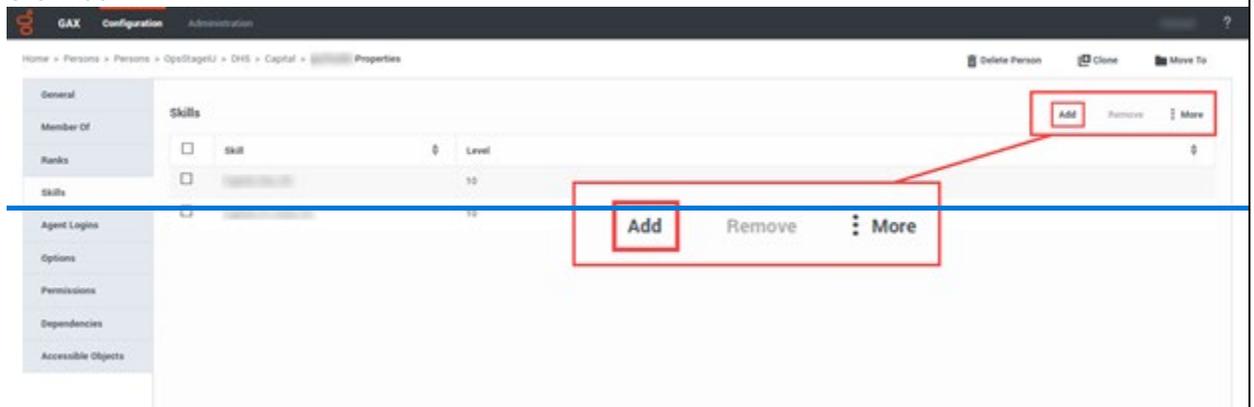


6.

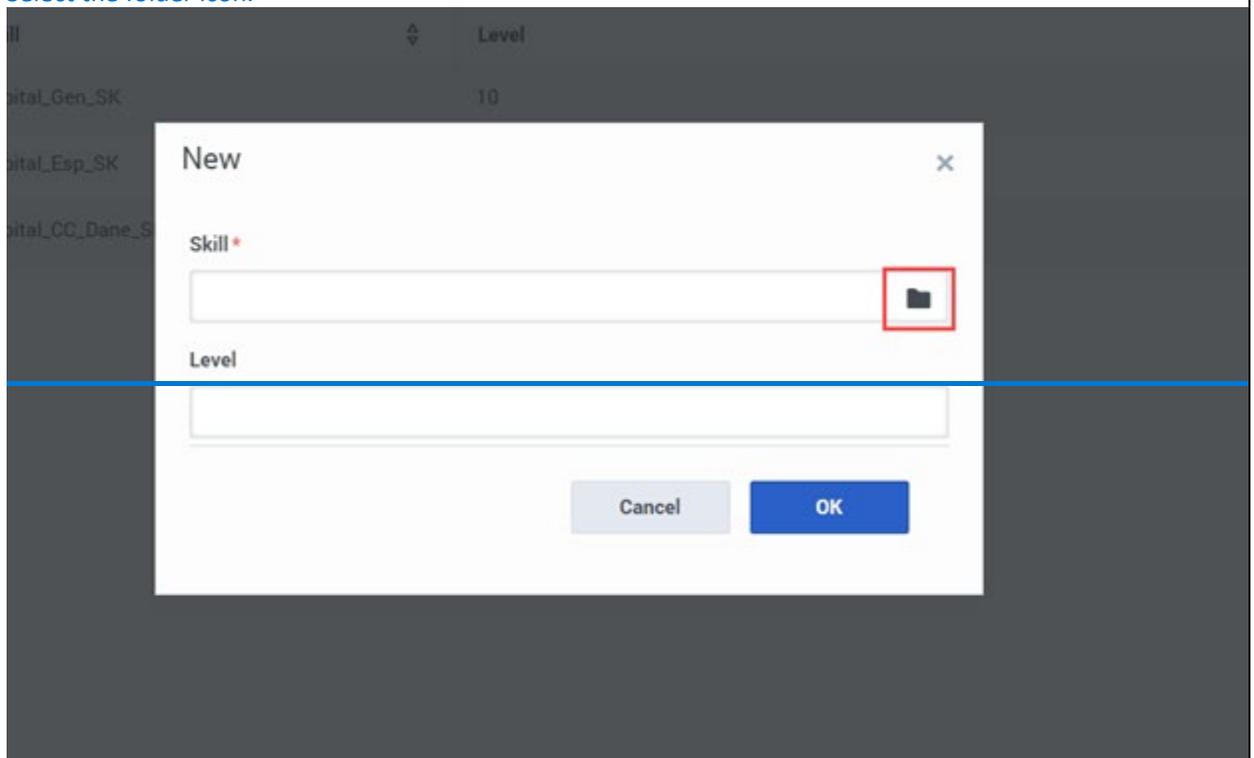
7. Select Skills on the left hand list. Once selected, there is a list of the agent's skills.



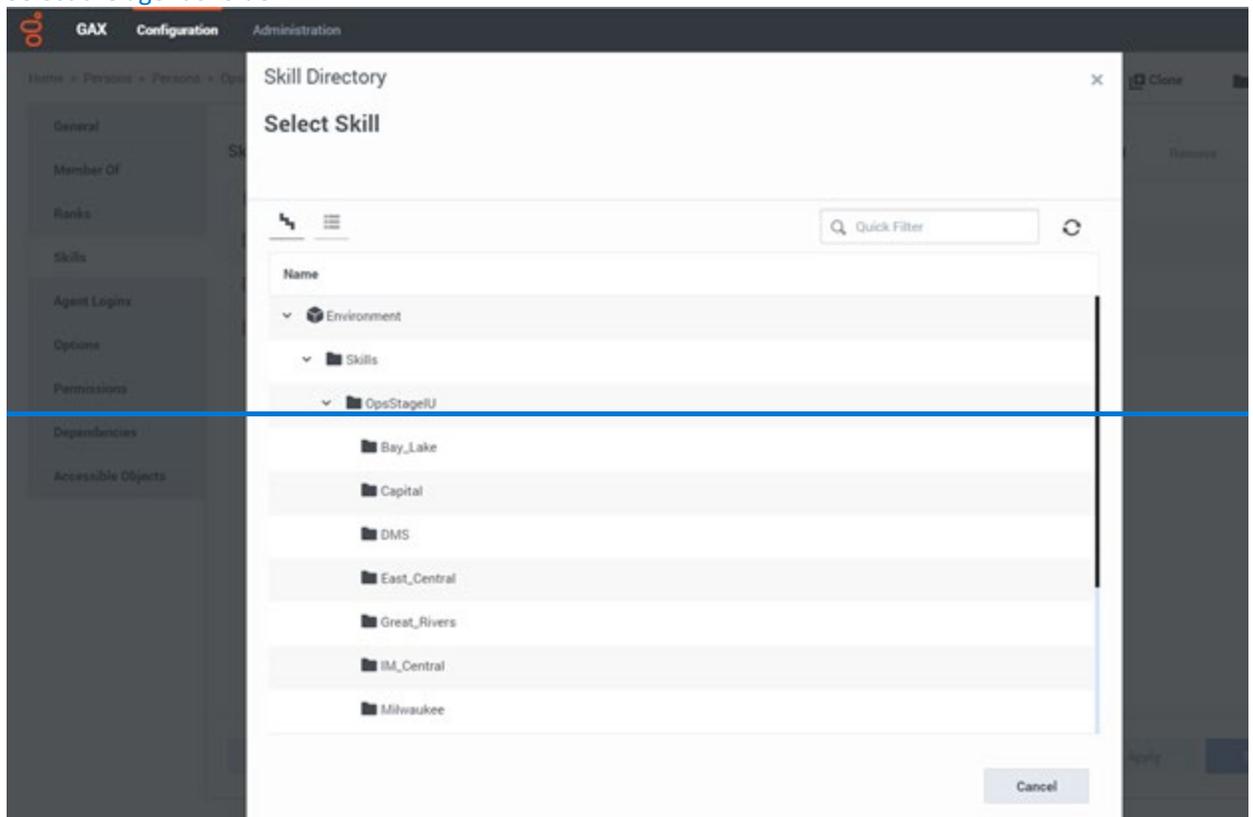
8. Click **Add**.



9. Select the folder icon.



10. Select the agent's folder.



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

12. Click **OK**.

No items

New

Skill *

Level

10

Cancel OK

13. Click **Apply**.

GAX Configuration Administration

Home > Persons > Persons > OpsStageU > DHS Training > Properties

Delete Person Clone Move To

General

Member Of

Ranks

Skills

Agent Logins

Options

Permissions

Dependencies

Accessible Objects

Skills

Add Remove More

<input type="checkbox"/>	Skill	Level
<input type="checkbox"/>		10

Cancel Apply Save

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

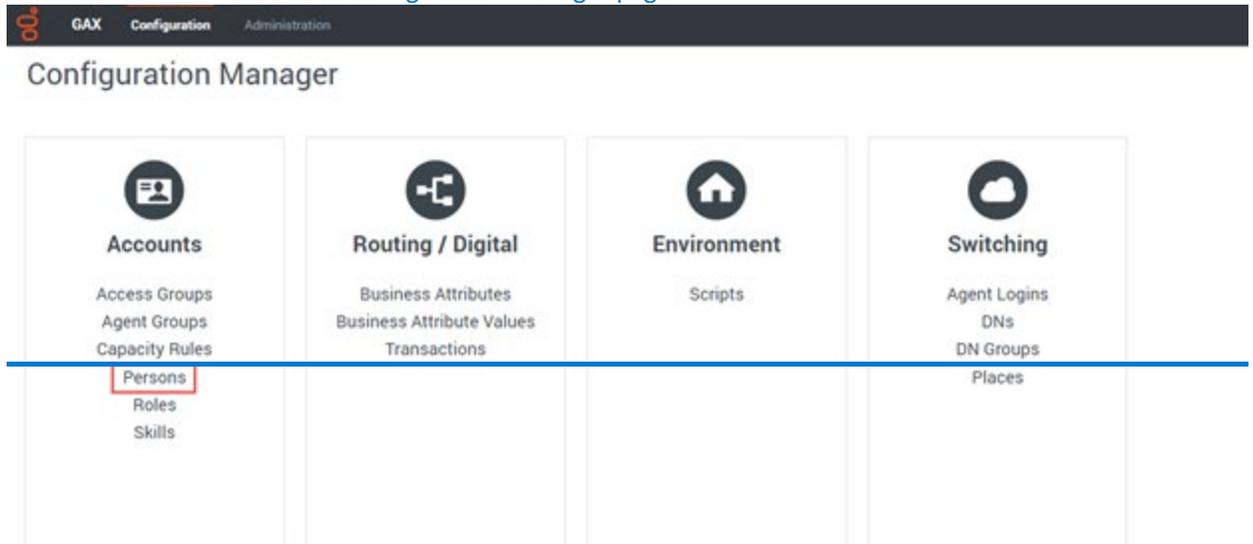
8.1.4 Adding a Skill for Multiple Agents

(Video instructions available: [Adding a Skill for Multiple Agents](#))

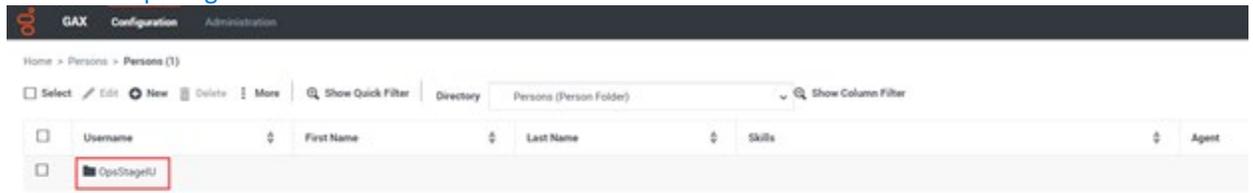
Multiple agents can be edited and managed at the same time.

To add a skill for multiple agents:

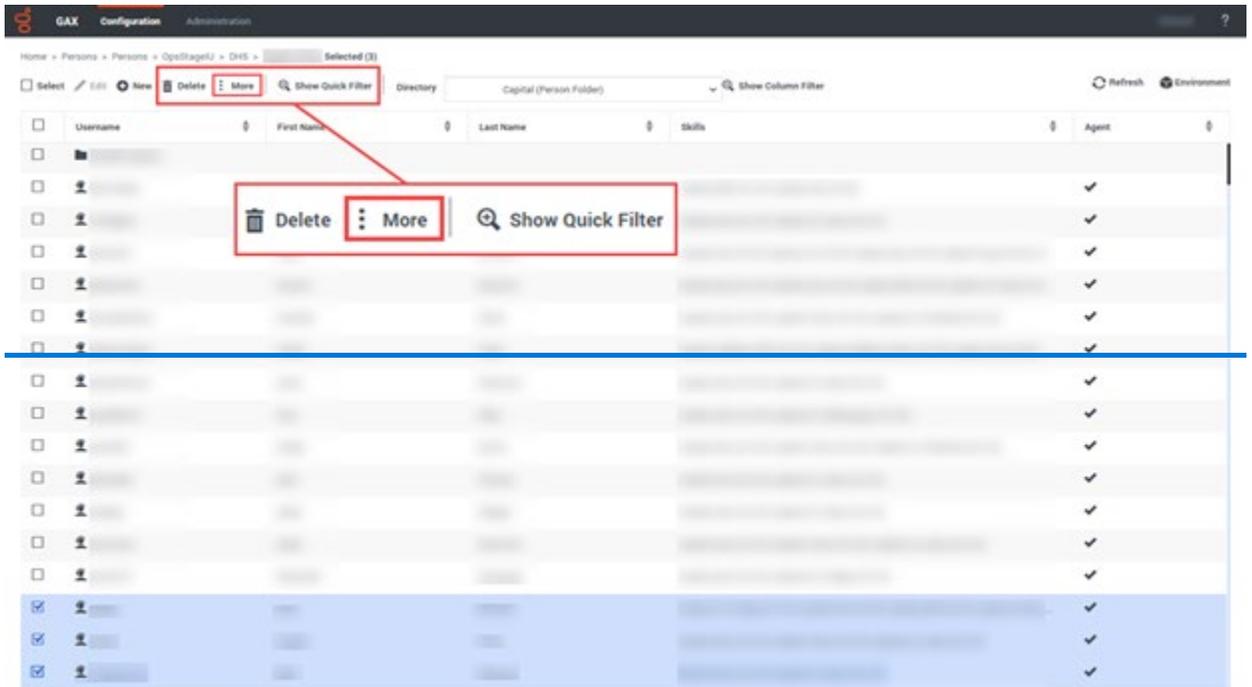
1. Select the Persons link on the Configuration Manager page.



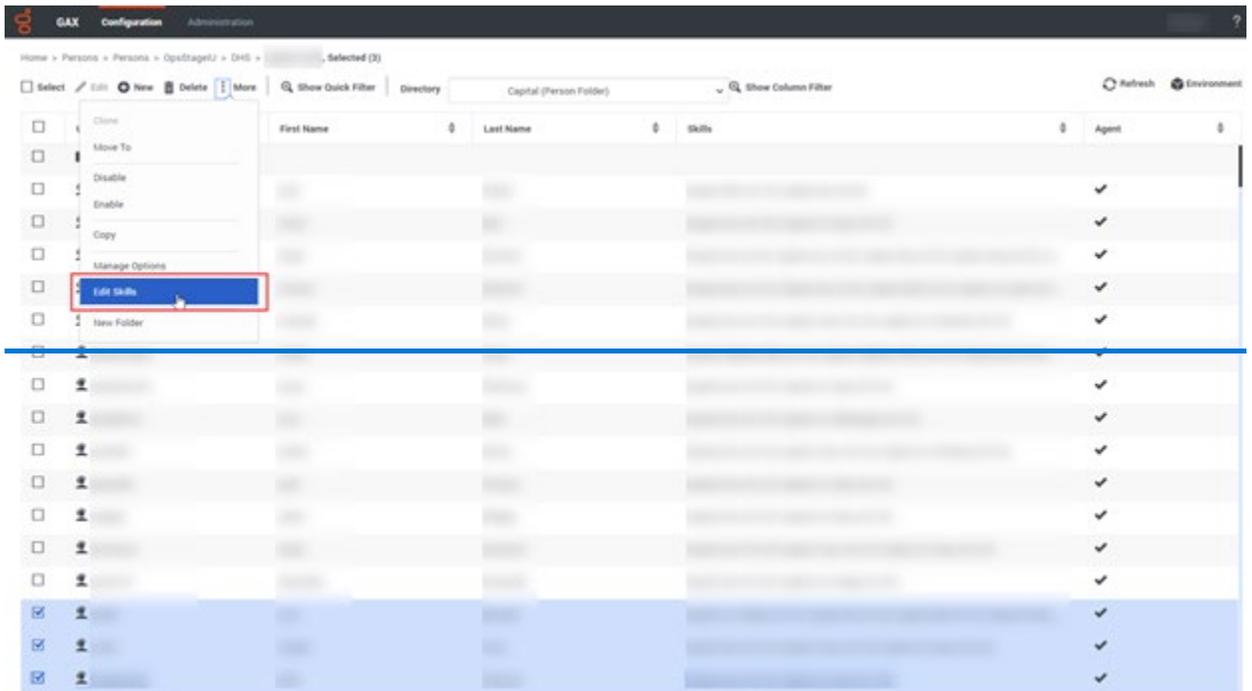
2. Select the OpsStageIU folder.



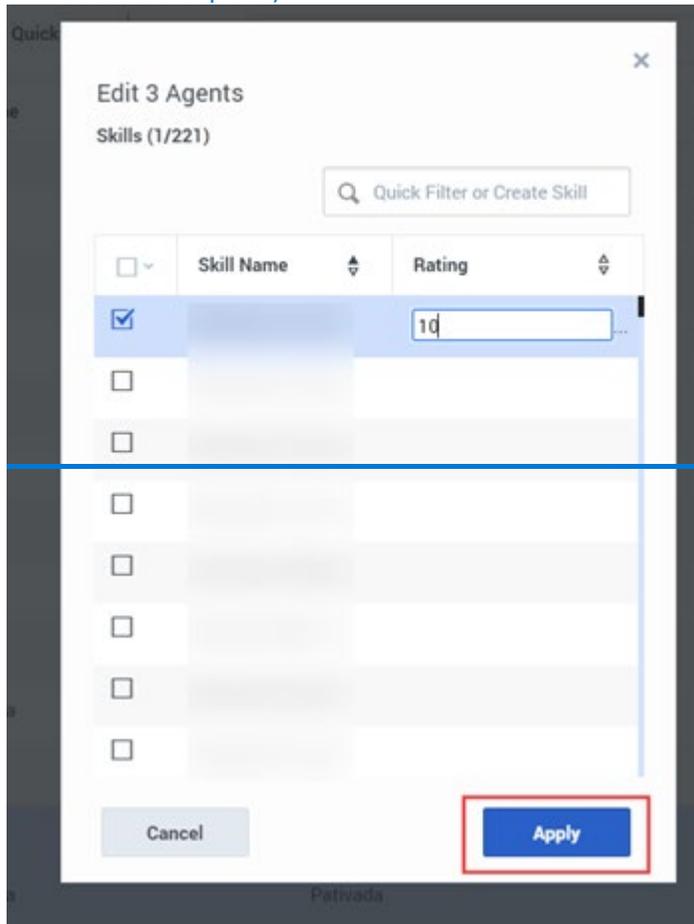
6. Select More.



7. Select Edit Skills.



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



9. Select **Apply**.

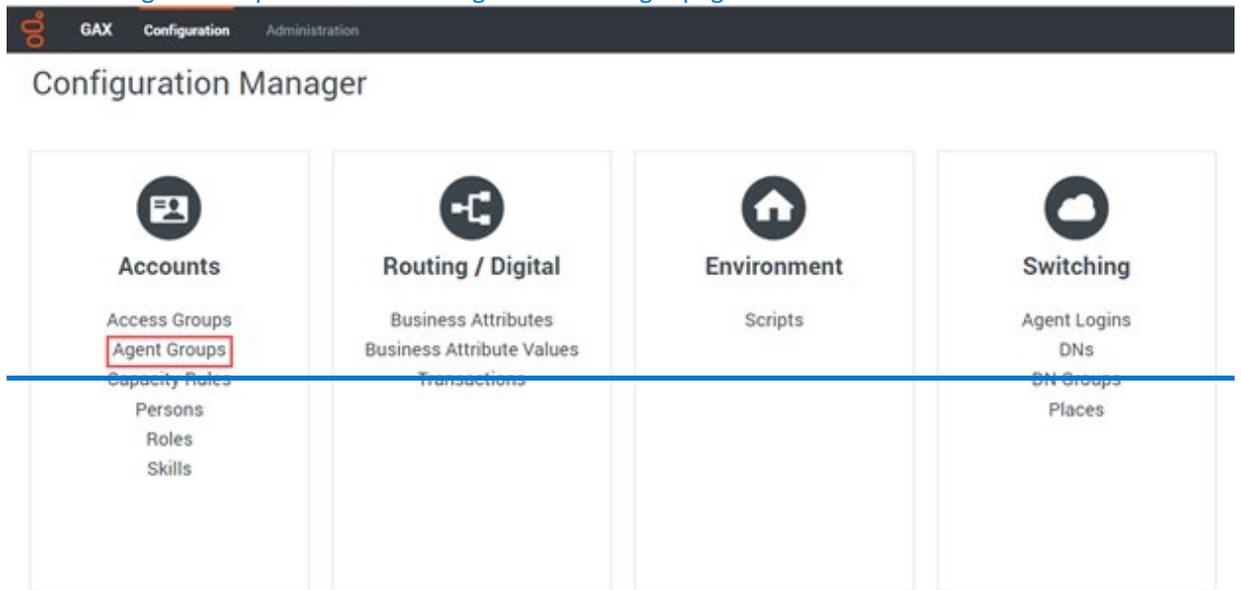
8.1.5 Adding an Agent to an Agent Group

(Video instructions available: [Adding an Agent to an Agent Group](#))

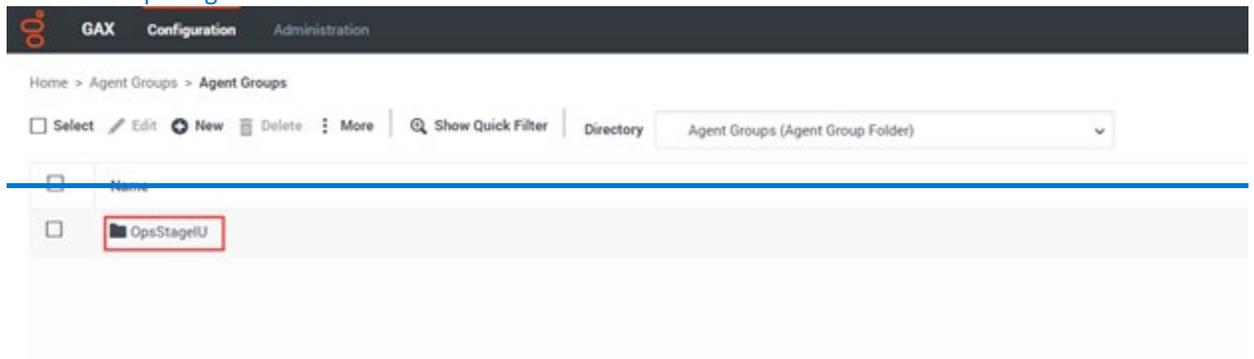
Agent groups are used to group agents with similar skill sets together. These help for reporting purposes such as for separating different job duties such as LTC and workers who process overpayments. If a queue has voicemail, agents within the group can access the voicemails. Functionalities such as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

To add an agent to an agent group:

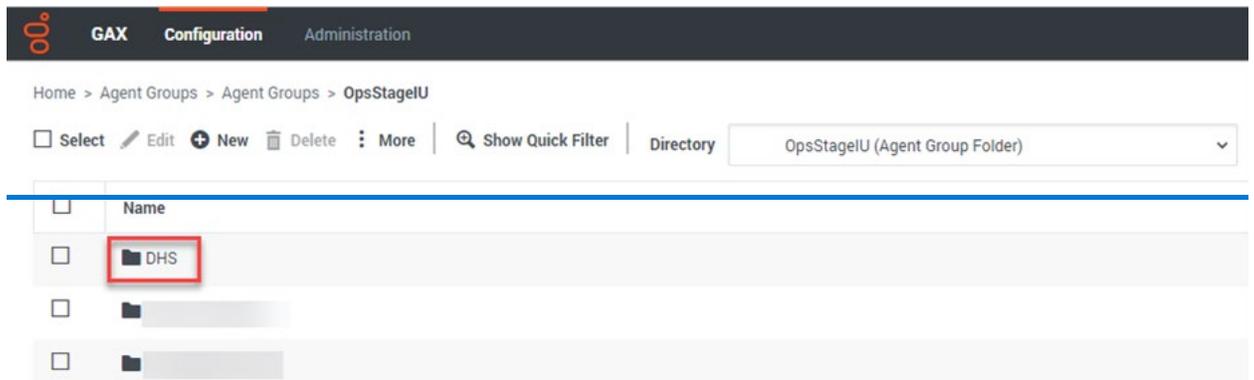
1. Select the Agent Groups link on the Configuration Manager page.



2. Select the OpsStageIU folder.



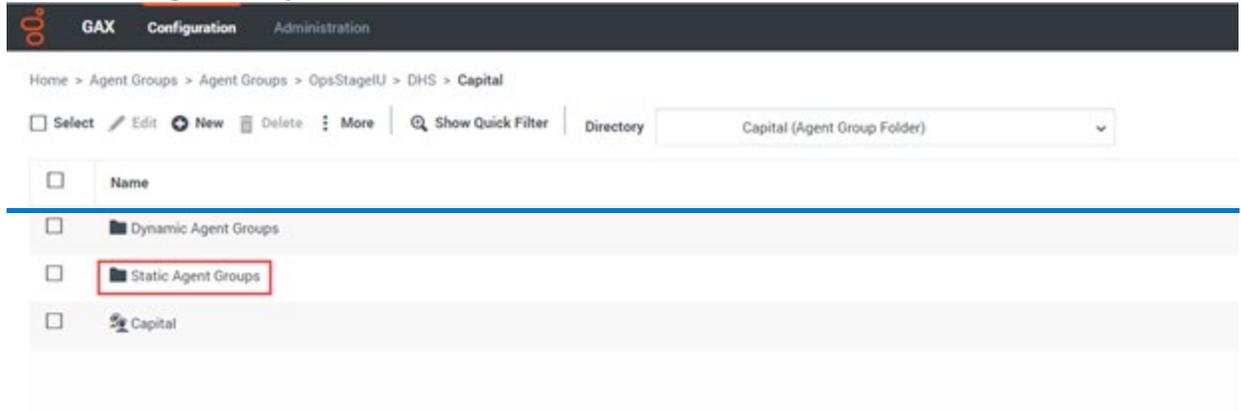
3. Select the DHS folder.



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

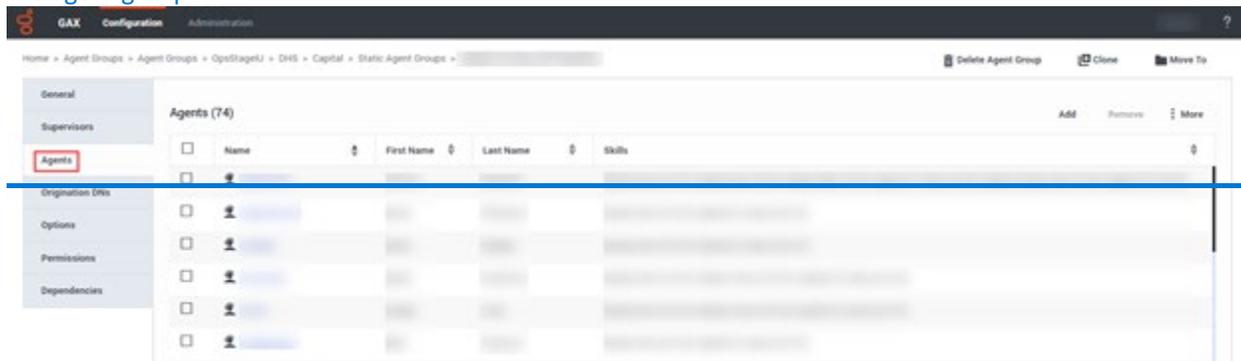
Note: All other lines of business not related to Income Maintenance are in the DMS folder.

5. Select **Static Agent Groups**.

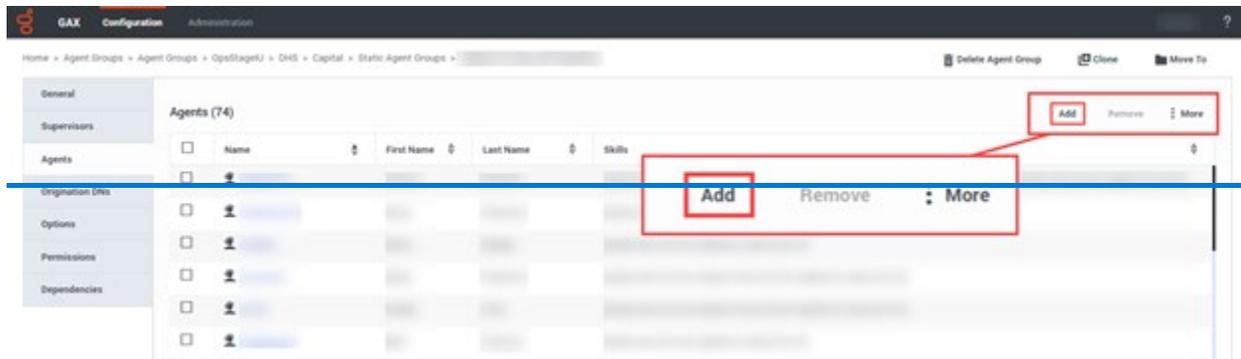


6. Select the agent group from the list.

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

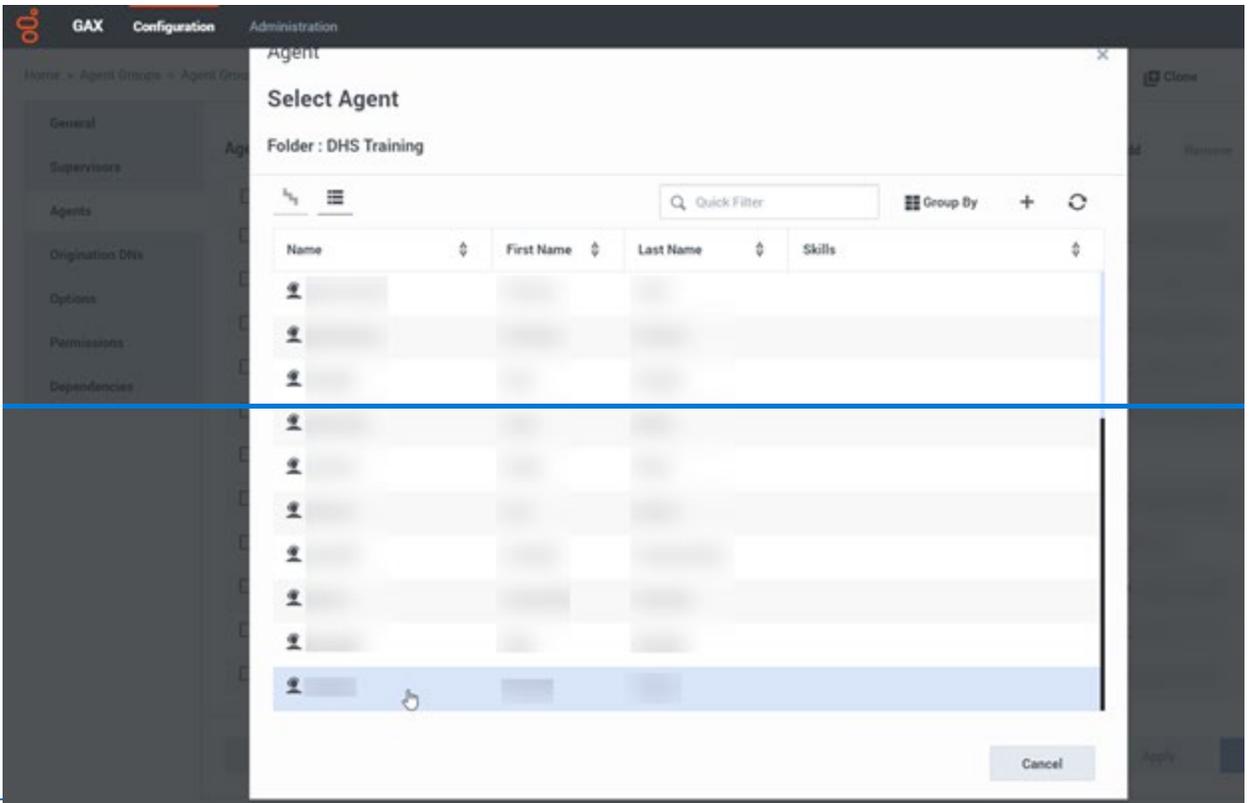


8. Select **Add**.



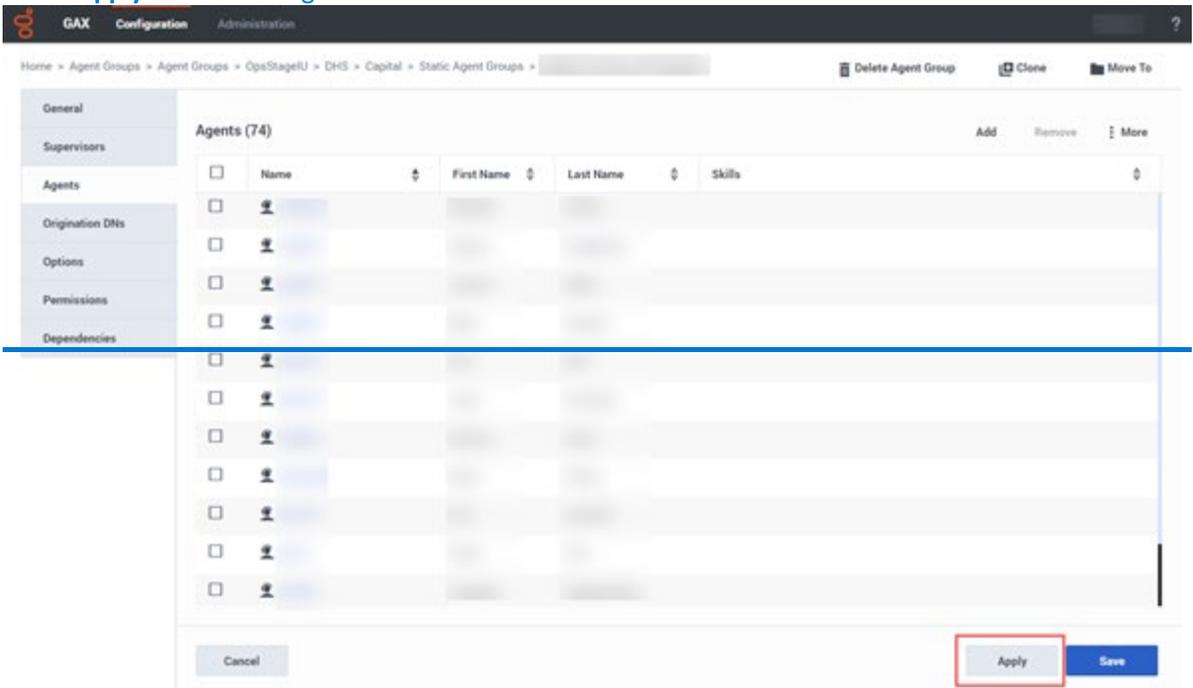
9. Select the consortium folder the agent is in and then select the agent. Add any other agents to the agent group if applicable.

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



10.

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



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

8.1.6 Adding or Removing a Supervisor from a Static Agent Group

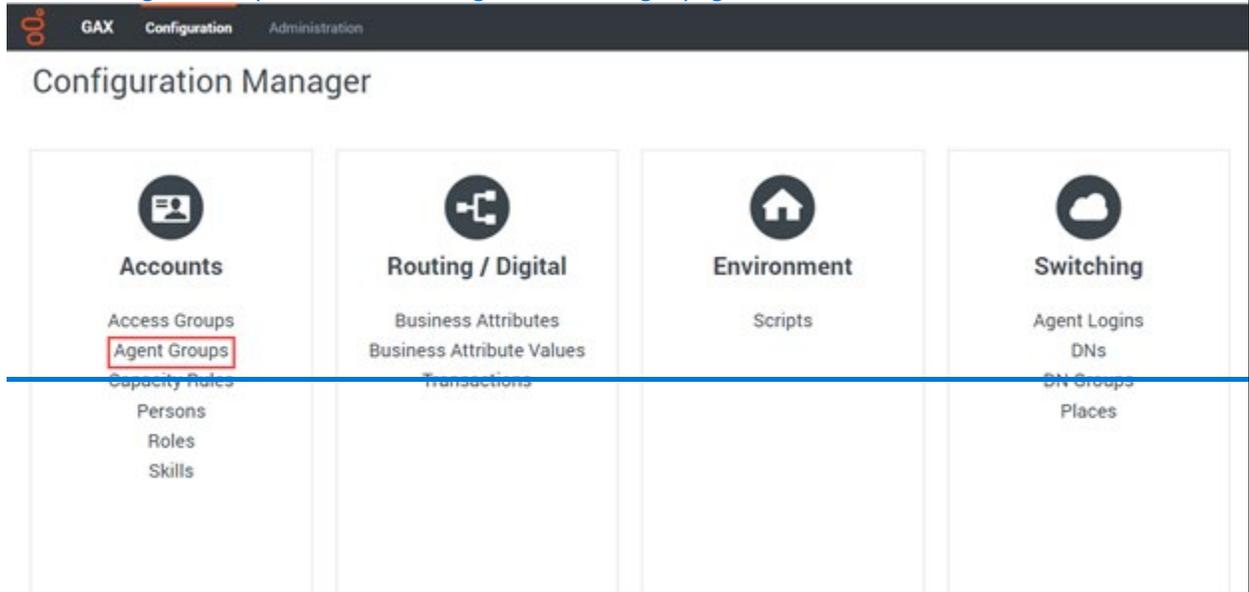
Adding a user as a supervisor in a static agent group allows the individual to monitor or listen to calls for any agent in that agent group.

8.1.6.1 Adding a Supervisor to a Static Agent Group

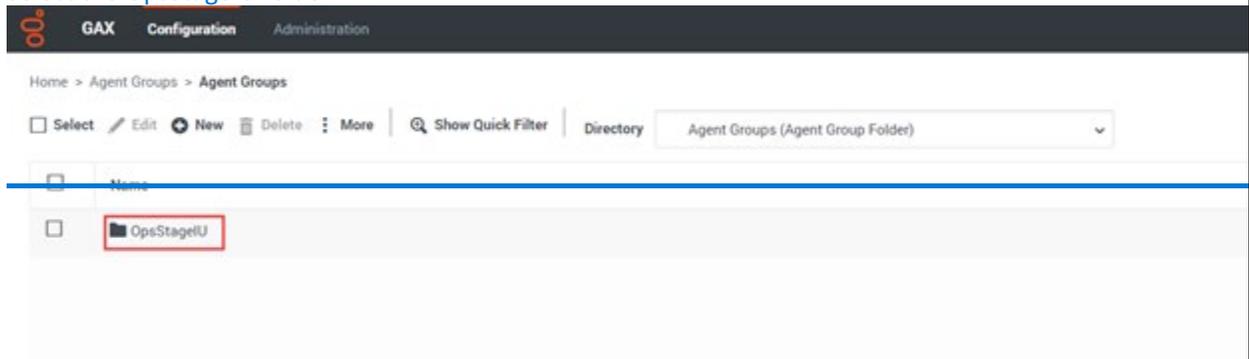
(Video instructions available: [Adding a Supervisor to a Static Agent Group](#))

To add a supervisor to a static agent group:

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



2. Select the OpsStageIU folder.



3. Select the DHS folder.

The screenshot shows the GAX Configuration Administration interface. The breadcrumb path is Home > Agent Groups > Agent Groups > OpsStageIU. The Directory dropdown is set to 'OpsStageIU (Agent Group Folder)'. A table lists folders, with 'DHS' highlighted by a red box.

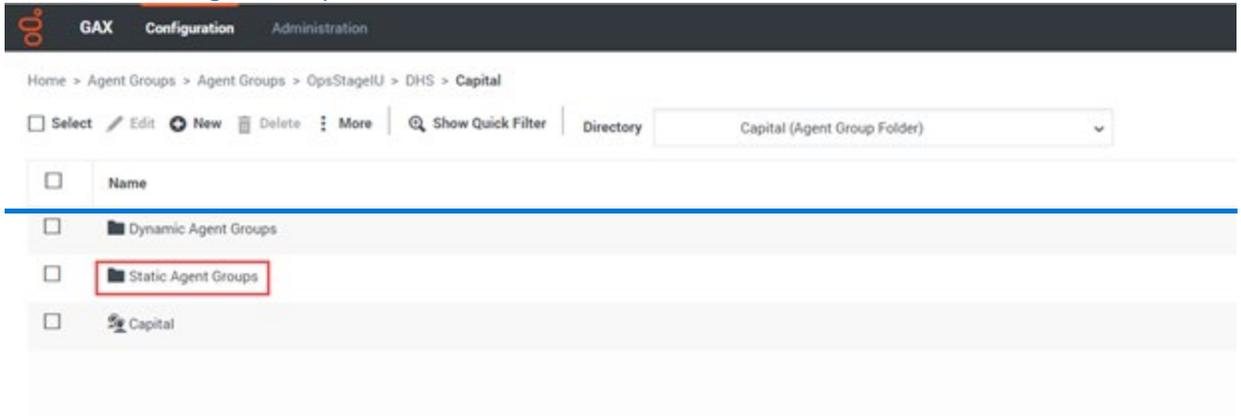
<input type="checkbox"/>	Name
<input type="checkbox"/>	DHS
<input type="checkbox"/>	[Redacted]
<input type="checkbox"/>	[Redacted]

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

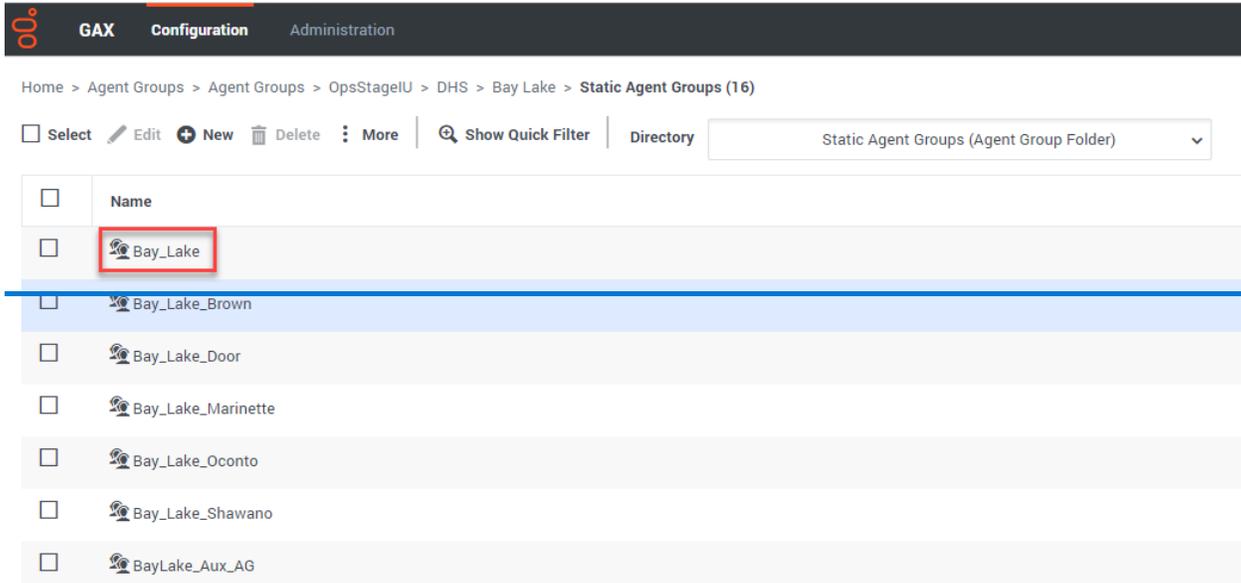
The screenshot shows the GAX Configuration Administration interface. The breadcrumb path is Home > Agent Groups > Agent Groups > OpsStageIU > DHS. The Directory dropdown is set to 'DHS (Agent Group Folder)'. A table lists various LOB folders, with the entire list highlighted by a red box.

<input type="checkbox"/>	Name
<input type="checkbox"/>	Bay Lake
<input type="checkbox"/>	Capital
<input type="checkbox"/>	DMS
<input type="checkbox"/>	East Central
<input type="checkbox"/>	Great Rivers
<input type="checkbox"/>	IM Central
<input type="checkbox"/>	Milwaukee
<input type="checkbox"/>	Moraine Lakes
<input type="checkbox"/>	Northern
<input type="checkbox"/>	Southern
<input type="checkbox"/>	Tribal
<input type="checkbox"/>	Western
<input type="checkbox"/>	WKRP

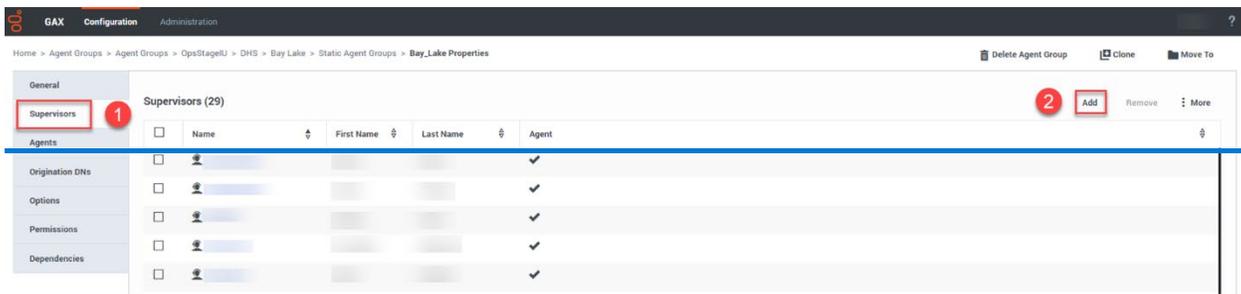
5. Select the Static Agent Groups folder.



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



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



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

Supervisor x

Select Supervisor

Folder : Bay_Lake

Quick Filter

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

☰☰

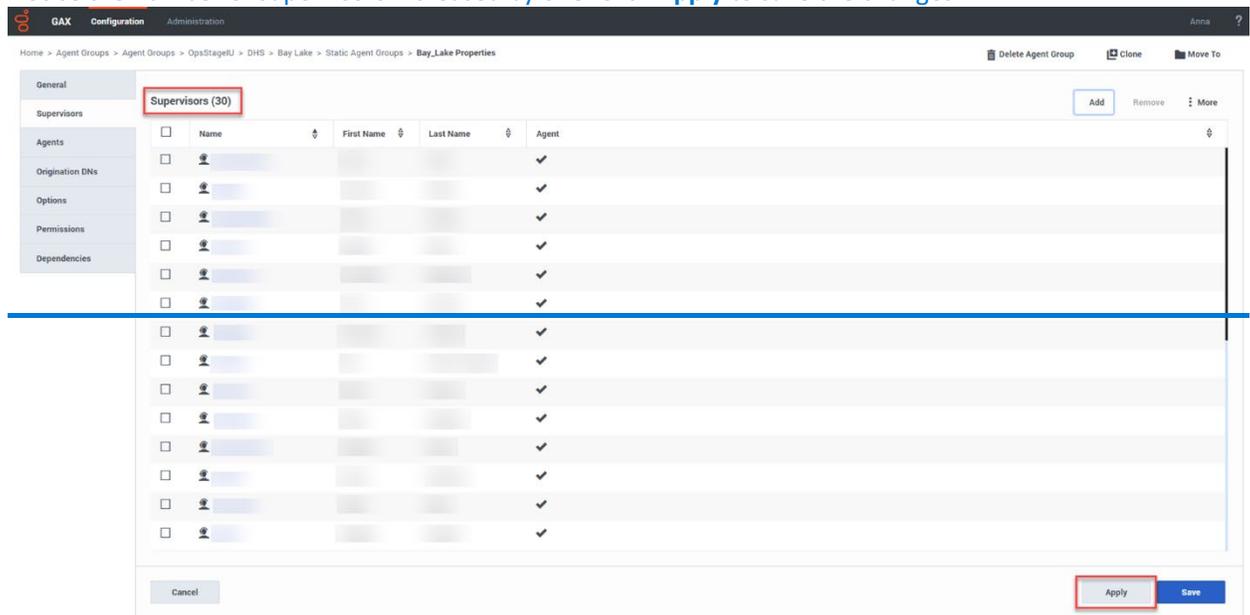
Q Quick Filter

+↻

Name	First Name	Last Name	Agent
[blurred]	[blurred]	[blurred]	✓
[blurred]	[blurred]	[blurred]	✓
[blurred]	[blurred]	[blurred]	✓
[blurred]	[blurred]	[blurred]	✓
[blurred]	[blurred]	[blurred]	✓
[blurred]	[blurred]	[blurred]	✓
[blurred]	[blurred]	[blurred]	✓
[blurred]	[blurred]	[blurred]	✓
[blurred]	[blurred]	[blurred]	✓
[blurred]	[blurred]	[blurred]	✓

Cancel

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



8.1.6.2 Removing a Supervisor from a Static Agent Group

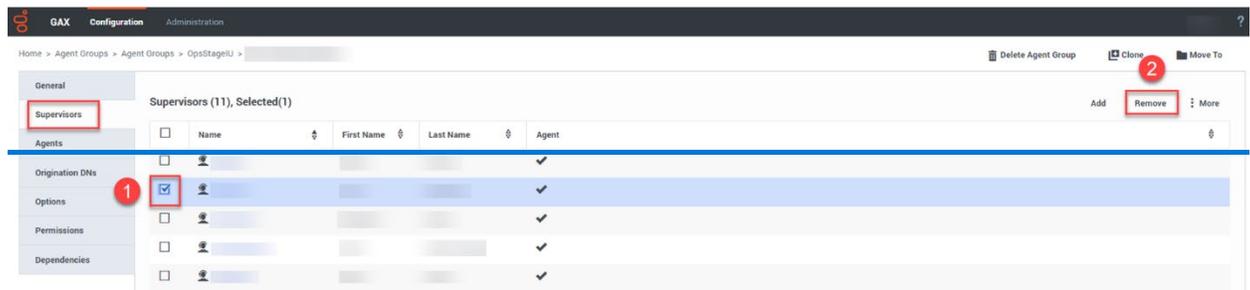
(Video instructions available: [Removing a Supervisor from a Static Agent Group](#))

To remove a supervisor from a static agent group:

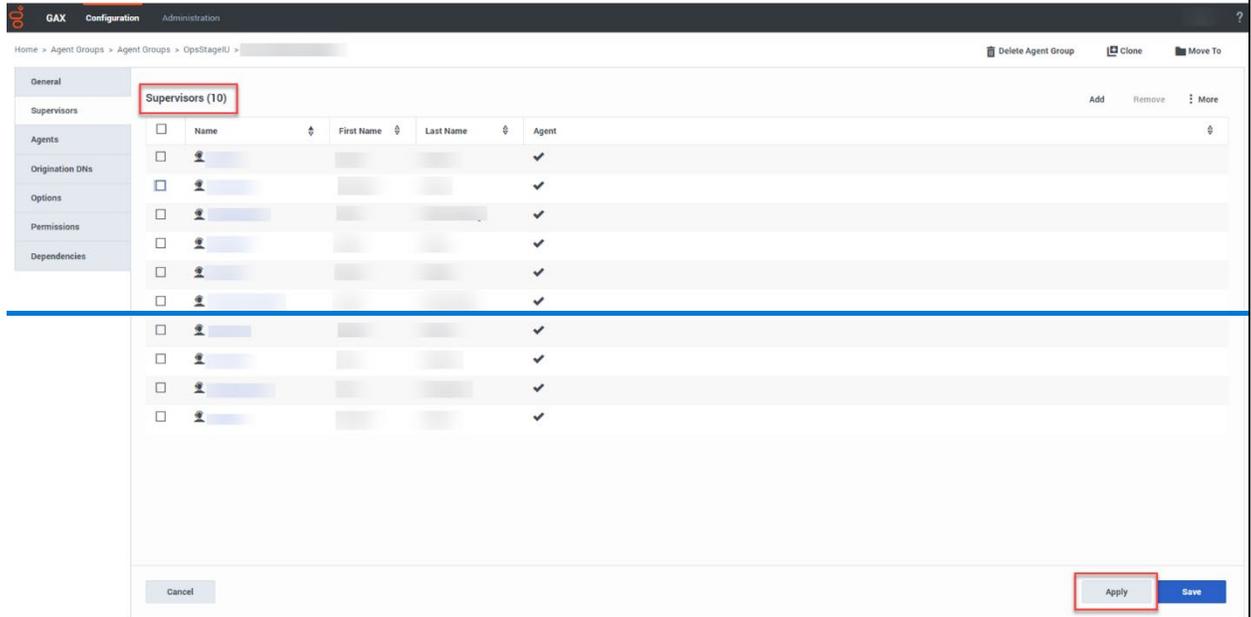
1. Follow instructions one through six found in [Section 8.1.6.1 Adding a Supervisor to a Static Agent Group](#).
2. From the Supervisors tab, check the checkbox next to the name of the Supervisor to be removed, and click **Remove**.

Note Be sure to select the appropriate agent group.

3.



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



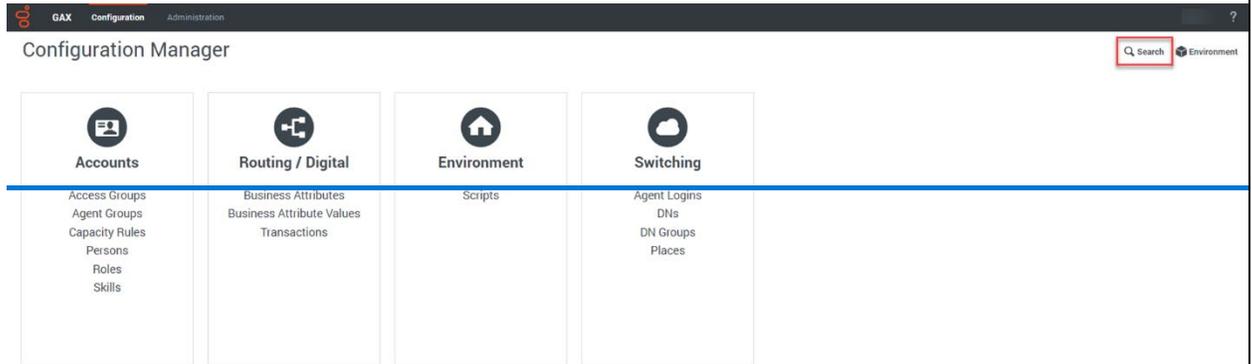
8.1.7 Quick Agent Search in Platform Administration

(Video instructions available: [Quick Agent Search in Platform Administration](#))

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

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

1. Click **Search**.



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

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

The screenshot shows the search interface with the following elements:

- Header: GAX Configuration Administration
- Breadcrumbs: Home > Search
- Search Fields: Name / Number (text input), Type (dropdown menu with 'Person' selected), State (dropdown menu), Tenant (dropdown menu), Case Sensitive (checkbox), Clear (button), Search (button).
- Advanced Search: A dropdown menu labeled 'Advanced Search' is expanded, showing a search form with fields for Is Agent (checkbox), First Name (text input), Last Name (text input), Employee Id (text input), Switch (checkbox), Skill (text input), Agent Login (text input), and Agent Group (text input).
- Search Results: A table with columns: User Name, First Name, Last Name, Type, Tenant, Path. Below the table, it says 'No items'.

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

The screenshot shows the search interface with the following elements:

- Header: GAX Configuration Administration
- Breadcrumbs: Home > Search
- Search Fields: Name / Number (text input), Type (dropdown menu with 'Person' selected), State (dropdown menu), Tenant (dropdown menu), Case Sensitive (checkbox), Clear (button), Search (button).
- Advanced Search: A dropdown menu labeled 'Advanced Search' is expanded, showing a search form with fields for Is Agent (checkbox), First Name (text input), Last Name (text input), Employee Id (text input), Switch (checkbox), Skill (text input), Agent Login (text input), and Agent Group (text input).
- Search Results: A table with columns: User Name, First Name, Last Name, Type, Tenant, Path. Below the table, it says 'No items'.

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

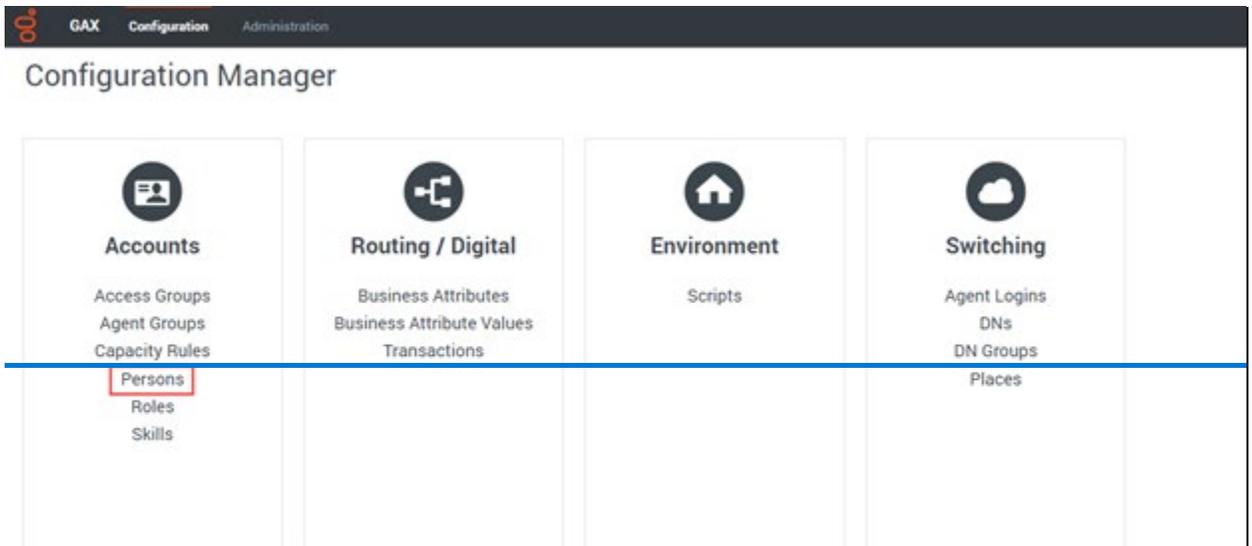
8.1.8 Editing General Agent Information

(Video instructions available: [\(Video instructions available: Editing General Agent Information\)](#))

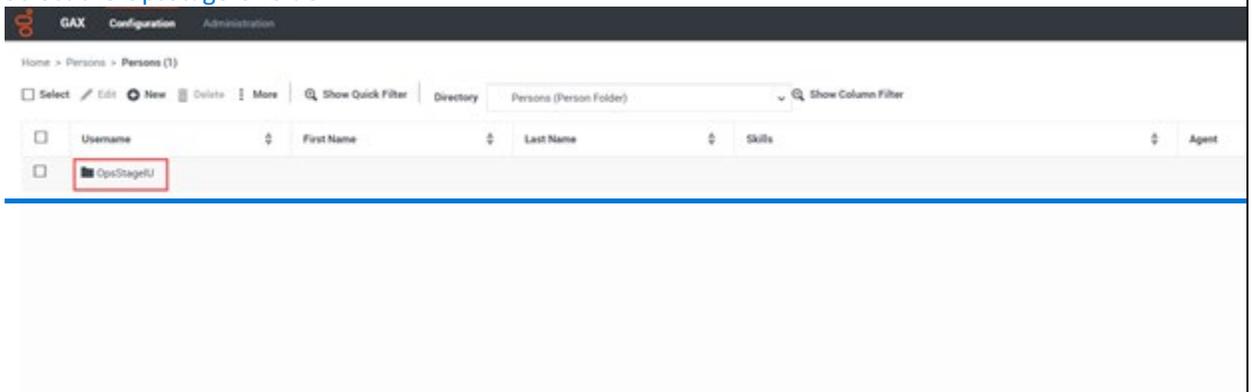
To change an agent's username, first name, last name, email address, password, or external ID follow the steps below:

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

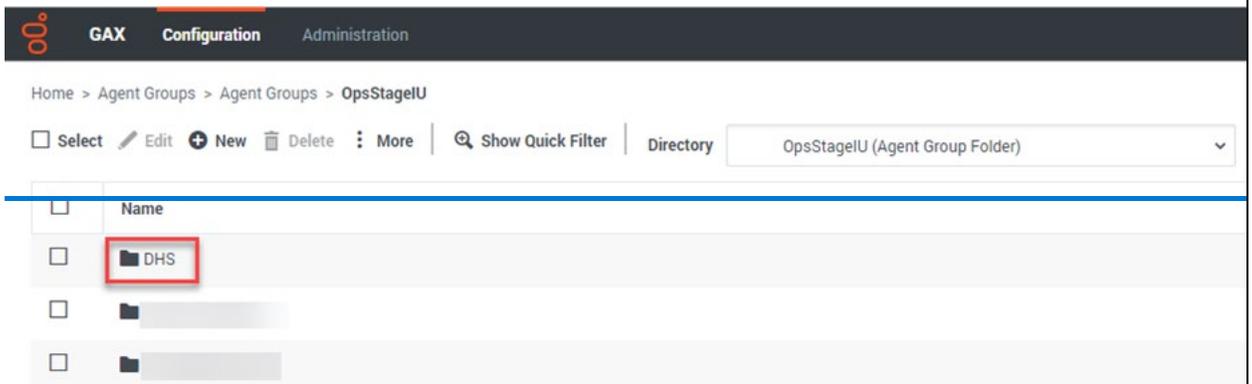
Note To conduct a quick search of an agent, see [Section 8.1.7 Quick Agent Search in Platform Administration](#), then proceed with step number five.



2. [Select the OpsStageIU folder.](#)



3. [Select the DHS folder.](#)



4. [Select the DMS folder or the consortium folder the agent is in \(Capital, Northern, Milwaukee, etc.\).](#)

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

GAX Configuration Administration

Home > Persons > Persons > OpsStageIU > DHS (13)

Select Edit New Delete More Show Quick Filter Directory DHS (Person Folder) Show Column Filter

<input type="checkbox"/>	Username	First Name	Last Name	Skills
<input type="checkbox"/>	Bay_Lake			
<input type="checkbox"/>	Capital			
<input type="checkbox"/>	DMS			
<input type="checkbox"/>	East_Central			
<input type="checkbox"/>	Great_Rivers			
<input type="checkbox"/>	IM_Central			
<input type="checkbox"/>	Milwaukee			
<input type="checkbox"/>	Moraine_Lakes			
<input type="checkbox"/>	Northern			
<input type="checkbox"/>	Southern			
<input type="checkbox"/>	Tribal			
<input type="checkbox"/>	Western			
<input type="checkbox"/>	WKRP			

5. Select the agent entry to be edited.

GAX Configuration Administration

Home > Persons > Persons > OpsStageIU > DHS > Bay_Lake (101)

Select Edit New Delete More Show Quick Filter Directory Bay_Lake (Person Folder) Show Column Filter

<input type="checkbox"/>	Username	First Name	Last Name	Skills	Agent
<input type="checkbox"/>	Disabled Agents				
<input type="checkbox"/>	[User Icon]			BayLake_Gen_SK (10), BayLake_Hmg_SK (10), BayLake_Trans_SK (10)	✓
<input type="checkbox"/>	[User Icon]			BayLake_Hmg_SK (0), BayLake_Trans_SK (0), BayLake_EBD_LTC_SK (0), BayLake_G...	✓
<input type="checkbox"/>	[User Icon]			BayLake_EBD_LTC_SK (0), BayLake_Gen_SK (10), BayLake_Hmg_SK (0), BayLake_Trans...	✓
<input type="checkbox"/>	[User Icon]			BayLake_Gen_SK (10), BayLake_Hmg_SK (10), BayLake_Trans_SK (10), BayLake_Chil...	✓
<input type="checkbox"/>	[User Icon]			BayLake_Gen_SK (10), BayLake_ChildCare_SK (0), BayLake_Trans_SK (0), BayLake_...	✓
<input type="checkbox"/>	[User Icon]			BayLake_Gen_SK (10), BayLake_Trans_SK (0), BayLake_EBD_LTC_SK (0), BayLake_C...	✓
<input type="checkbox"/>	[User Icon]			BayLake_Gen_SK (10), BayLake_Hmg_SK (10), BayLake_Trans_SK (10)	✓
<input type="checkbox"/>	[User Icon]			BayLake_EBD_LTC_SK (10), BayLake_Gen_SK (0), BayLake_Hmg_SK (0), BayLake_Tr...	✓
<input type="checkbox"/>	[User Icon]			BayLake_Hmg_SK (0), BayLake_Trans_SK (0), BayLake_EBD_LTC_SK (0), BayLake_G...	✓
<input type="checkbox"/>	[User Icon]			BayLake_Gen_SK (10), BayLake_Hmg_SK (0), BayLake_Trans_SK (0), BayLake_EBD_L...	✓

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

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

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

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

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

The screenshot shows the Configuration Manager interface for an agent's profile. The 'General' tab is active, and several fields are highlighted with red boxes: Username, First Name, Last Name, E-mail Address, Employee ID, Password, Confirm Password, Force Password Reset on Next Login checkbox, and External ID. A callout box points to the checkbox with the text: "Anytime a password is reset for an agent the Admin must check the box, 'Force Password Reset on Next Login.'" The 'Apply' and 'Save' buttons are also highlighted with red boxes.

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

8.2 Business Controls

[8.2.1 Logging in for Business Controls](#) (Video instructions available: [Logging in for Business Controls](#))

[8.2.2 Emergency Flags](#) (Video instructions available: [Emergency Flags](#))

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

8.2.1 Logging in for Business Controls

(Video instructions available: [Logging in for Business Controls](#))

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

- 1.—Open the [Genesys Portal](#) with Firefox, Edge, or Chrome.

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

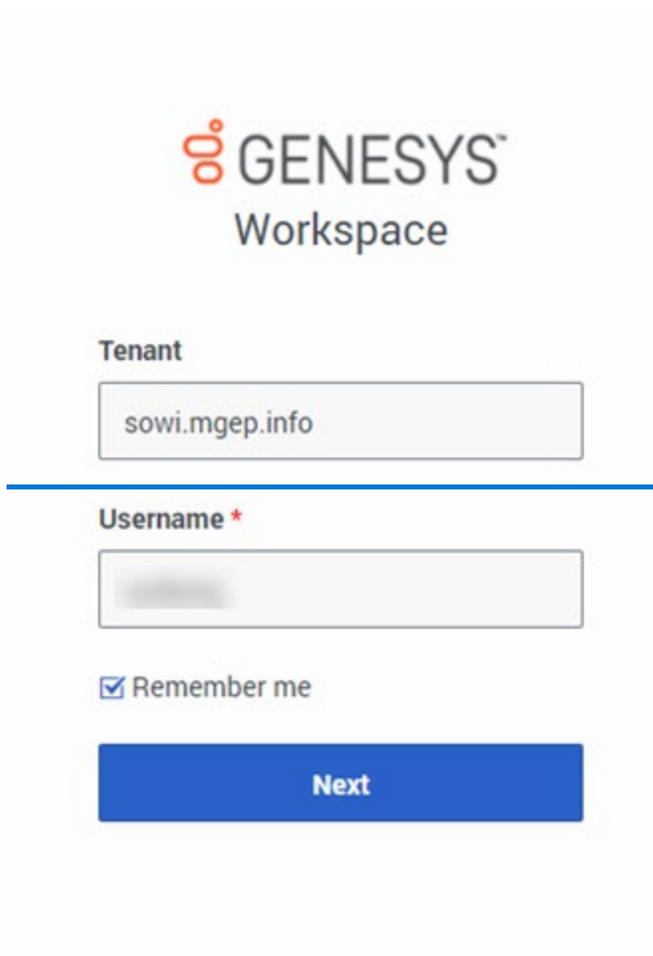


3. Complete the Tenant and Username fields with:

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

2. Username: Enter your WAMS ID

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



GENESYS
Workspace

Tenant

Username *

Remember me

Next

4. Select **Next**.

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



WISCONSIN DEPARTMENT
of **HEALTH SERVICES**

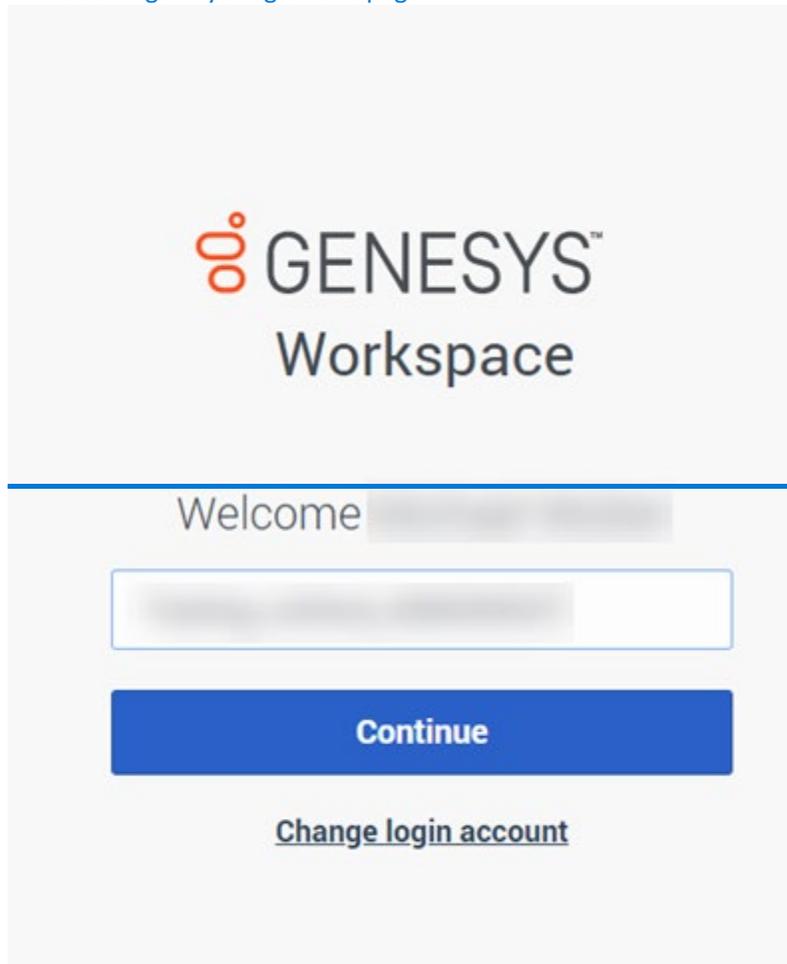
Secure Logon
for DHS-GENESYS

Username

Password

Logon

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



7. The Applications page displays. Select the business controls tab. Emergency flags are the only business controls used.

8.2.2 Emergency Flags

(Video instructions available: [Emergency Flags](#))

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

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

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

9 Reporting

[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

[9.1.1 Logging in to Access Real Time Reporting \(Video instructions available: Logging in to Access Real Time Reporting\)](#)

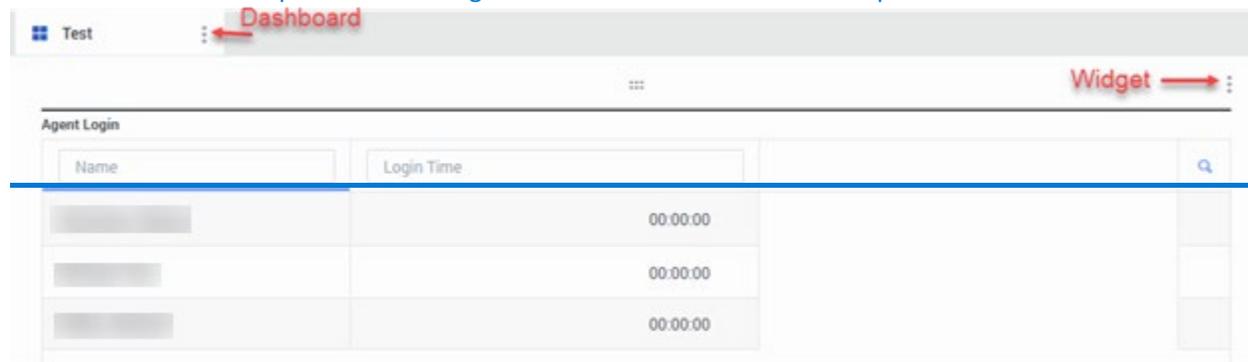
[9.1.2 Dashboards \(Video instructions available: Viewing a Public Dashboard\)](#)

[9.1.3 Editing Widgets \(Video instructions available: Editing Widgets\)](#)

[9.1.4 Sharing a Dashboard \(Video instructions available: Sharing a Dashboard\)](#)

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

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

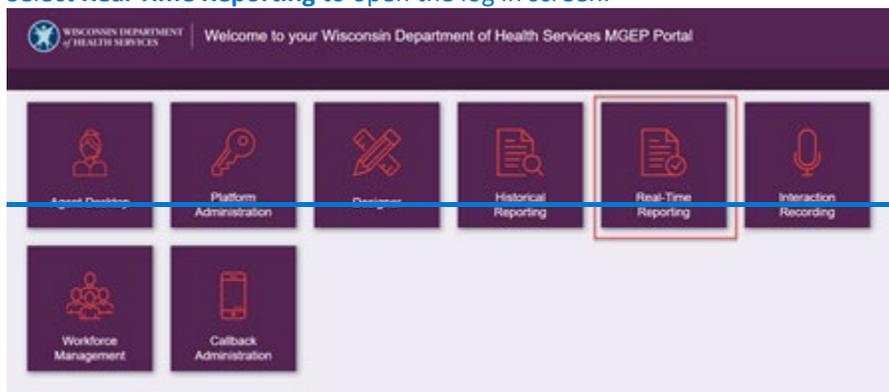


9.1.1 Logging in to Access Real Time Reporting

(Video instructions available: [Logging in to Access Real Time Reporting](#))

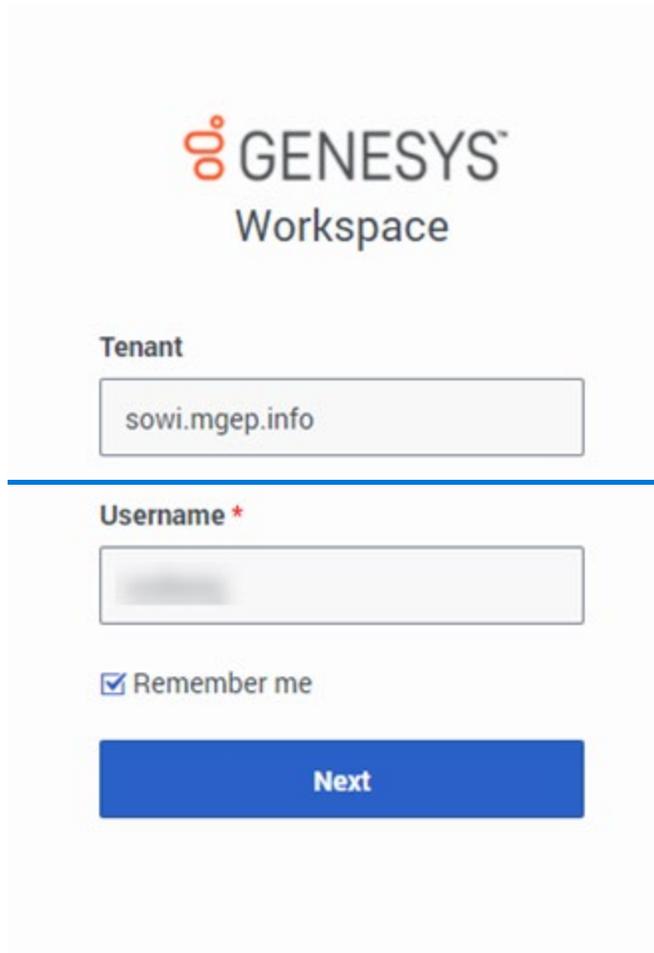
To access real-time reporting:-

1. Open the [Genesys Portal](#) with Firefox, Edge, or Chrome.
2. Select **Real Time Reporting** to open the log-in screen.



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

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



The screenshot shows the Genesys Workspace login interface. At the top, the Genesys logo (an orange stylized 'G') is followed by the text 'GENESYS' in a large, bold, grey font, and 'Workspace' in a smaller, grey font below it. Below the logo, there is a 'Tenant' label and a text input field containing 'sowi.mgep.info'. A horizontal blue line separates the Tenant field from the 'Username *' label and its corresponding text input field. Below the Username field, there is a checked checkbox labeled 'Remember me'. At the bottom of the form is a large blue button with the white text 'Next'.

4. Select **Next**.

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

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



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.

- Shift the widgets by selecting and dragging.

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

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

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

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

9.1.3 Editing Widgets

(Video instructions available: [Editing Widgets](#))

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

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

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

9.1.4 Sharing a Dashboard

(Video instructions available: [Sharing a Dashboard](#))

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

To share a new dashboard:

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

Updating a shared dashboard:

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

Note Do not update the Genesys templates.

9.2 Historical Reporting

[9.2.1 Running Reports](#) (Video instructions available: [Running Reports](#))

[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](#)

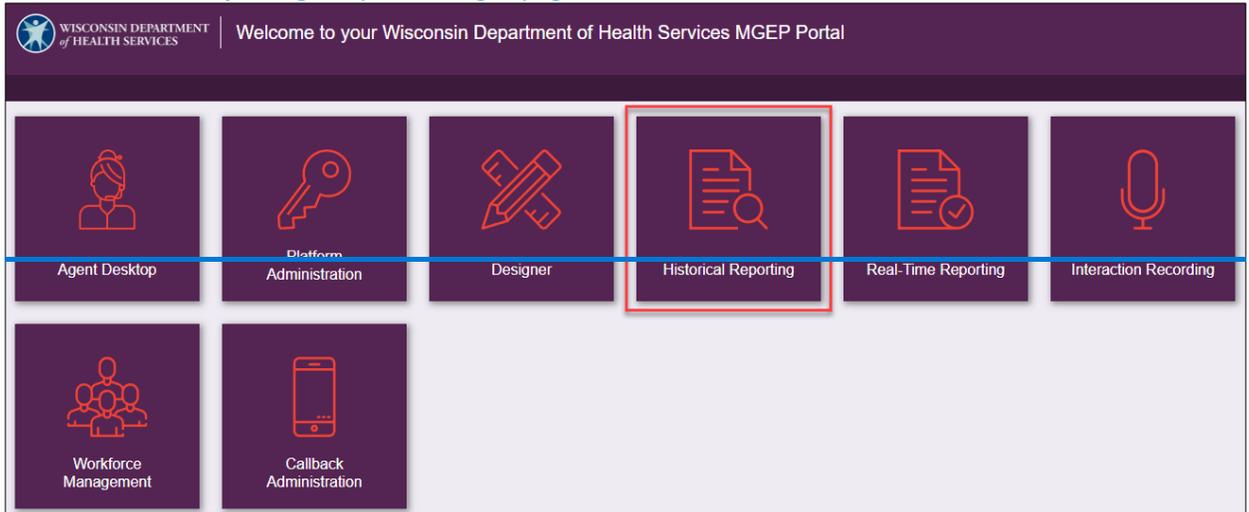
[9.2.5.4 Queue Voicemail Counts](#)

9.2.1 Running Reports

(Video instructions available: [Running Reports](#))

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

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



2. Enter the WAMS ID and password.

The image shows the login page for the Wisconsin Department of Health Services. The header features the department's logo and the text "WISCONSIN DEPARTMENT of HEALTH SERVICES". Below the header, the page title is "Secure Logon for DHS-GENESYS GCXI". The login form consists of a "Username" field, a "Password" field, and a "Logon" button.

3. Select **CX Insights**.

 <p>CX Insights The CX Insights project contains the reports (and supporting metrics and attributes) that you can use to analyze your contact center's operation, and gain insights to make more informed business decisions. Server name mstr-01/MSTR-02</p>	 <p>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</p>
--	--

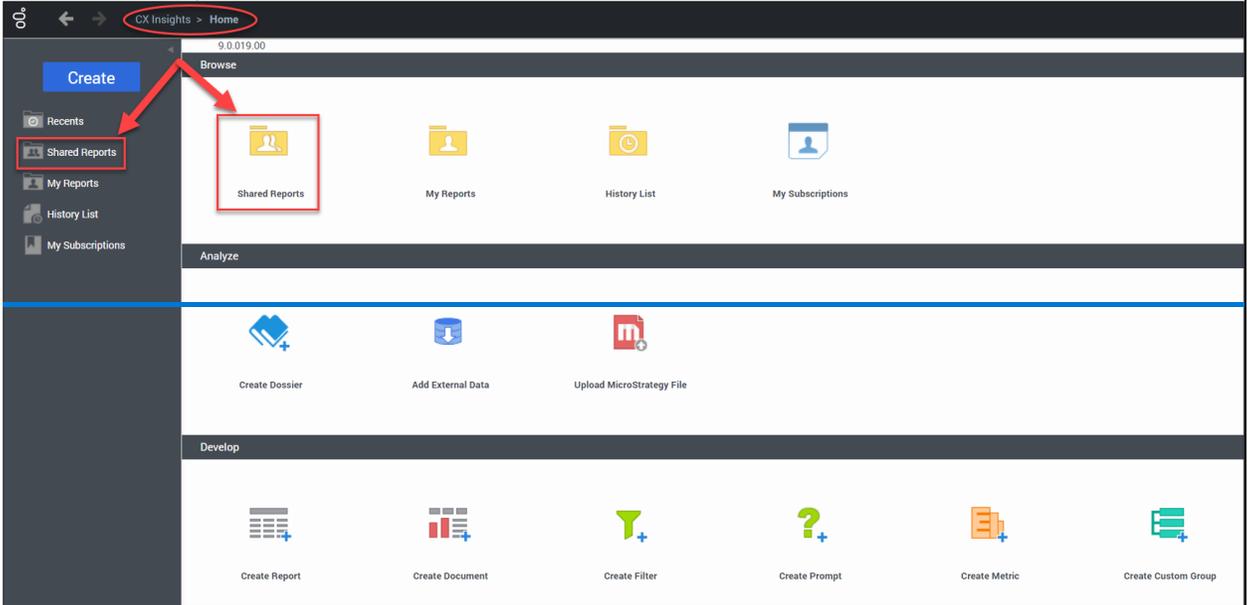
4. Warning message displays, select **continue**.

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.

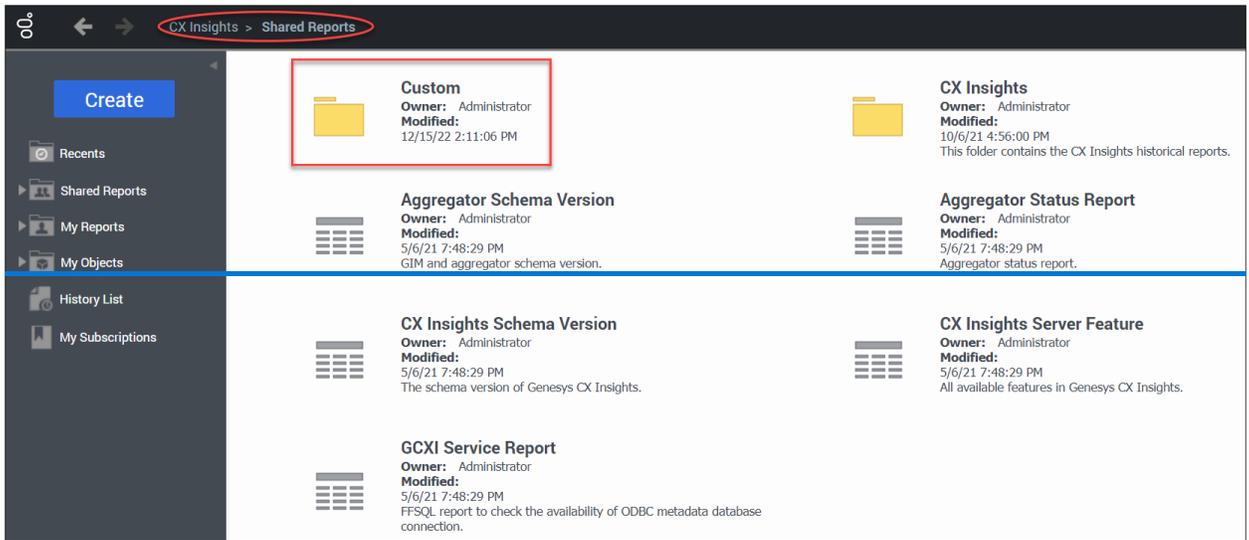
Continue

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

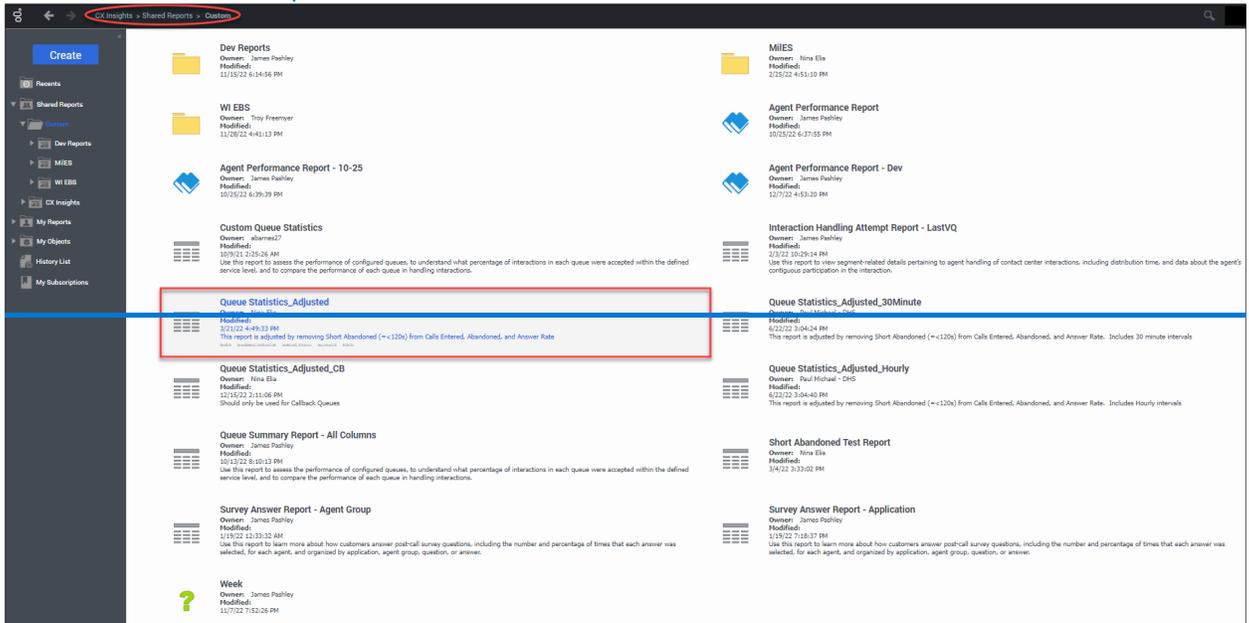


The screenshot shows the MicroStrategy user interface. At the top, the breadcrumb navigation reads "CX Insights > Home". Below this, there are two main sections: "Browse" and "Analyze". In the "Browse" section, there are four folder icons: "Shared Reports", "My Reports", "History List", and "My Subscriptions". The "Shared Reports" folder is highlighted with a red box. In the left-hand navigation menu, under the "Create" button, there are several options: "Recents", "Shared Reports", "My Reports", "History List", and "My Subscriptions". The "Shared Reports" option in the left menu is also highlighted with a red box. Red arrows point from the "Shared Reports" folder in the "Browse" section to the "Shared Reports" option in the left menu.

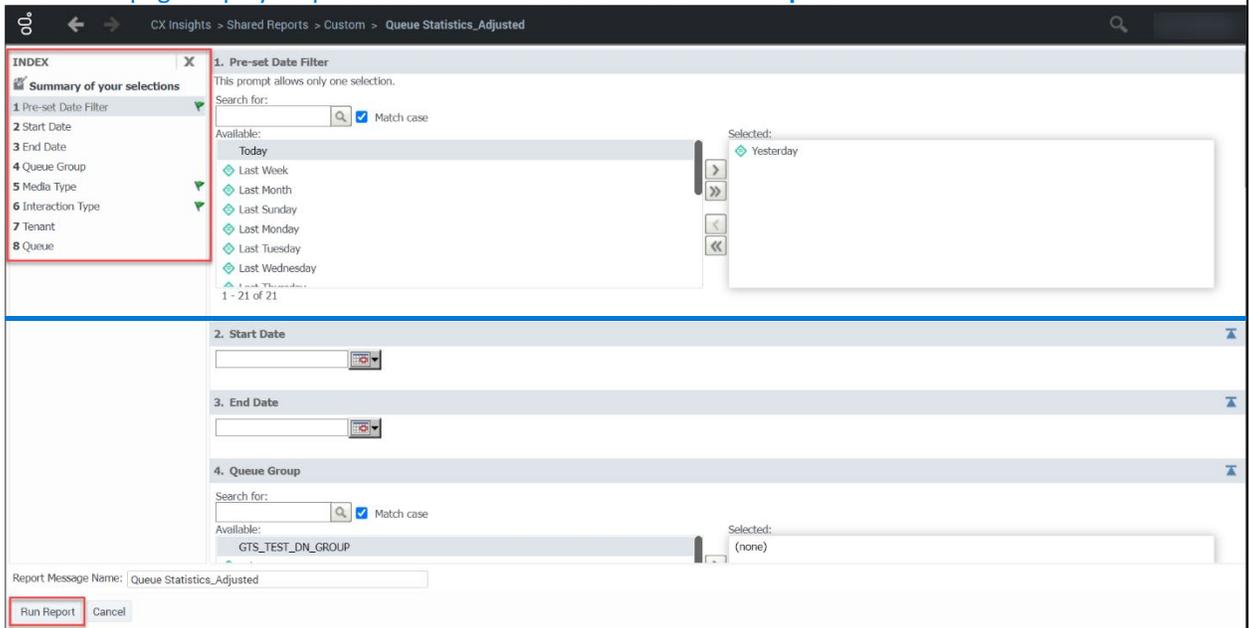
6. Select the Custom folder.



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

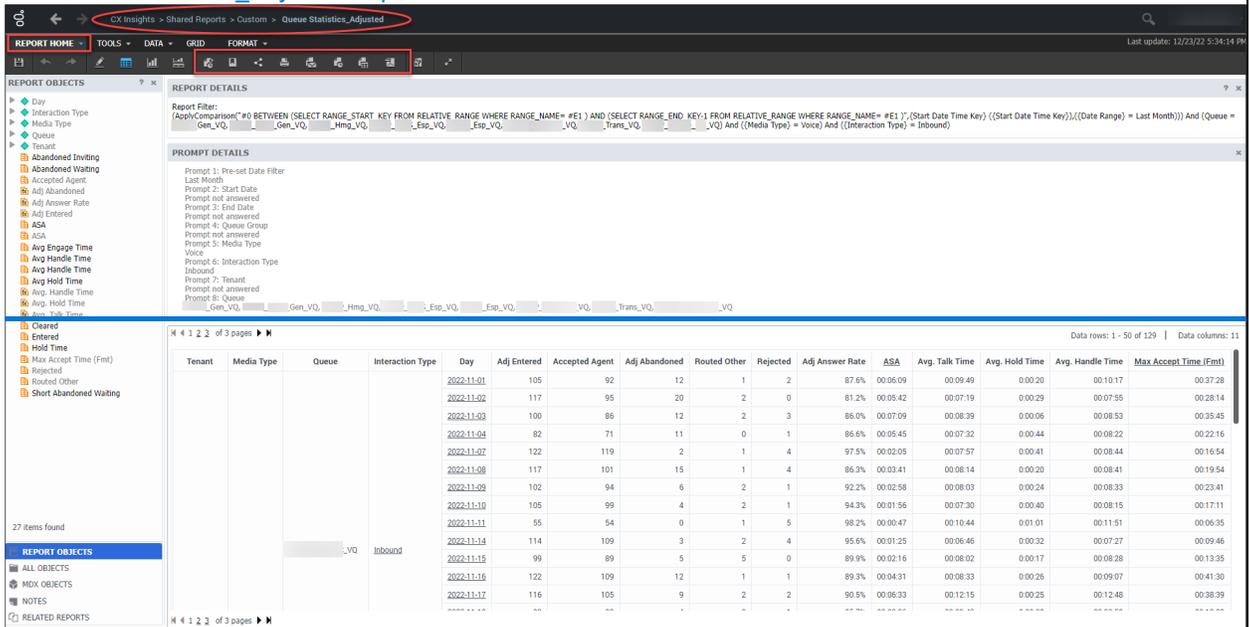


8. The INDEX page displays. Update the INDEX filters then select **Run Report**.



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

The **Queue Statistics Adjusted** report works best if run as a PDF or excel.



9.2.2 Creating Subscriptions

(Video instructions available: [Creating Subscriptions](#))

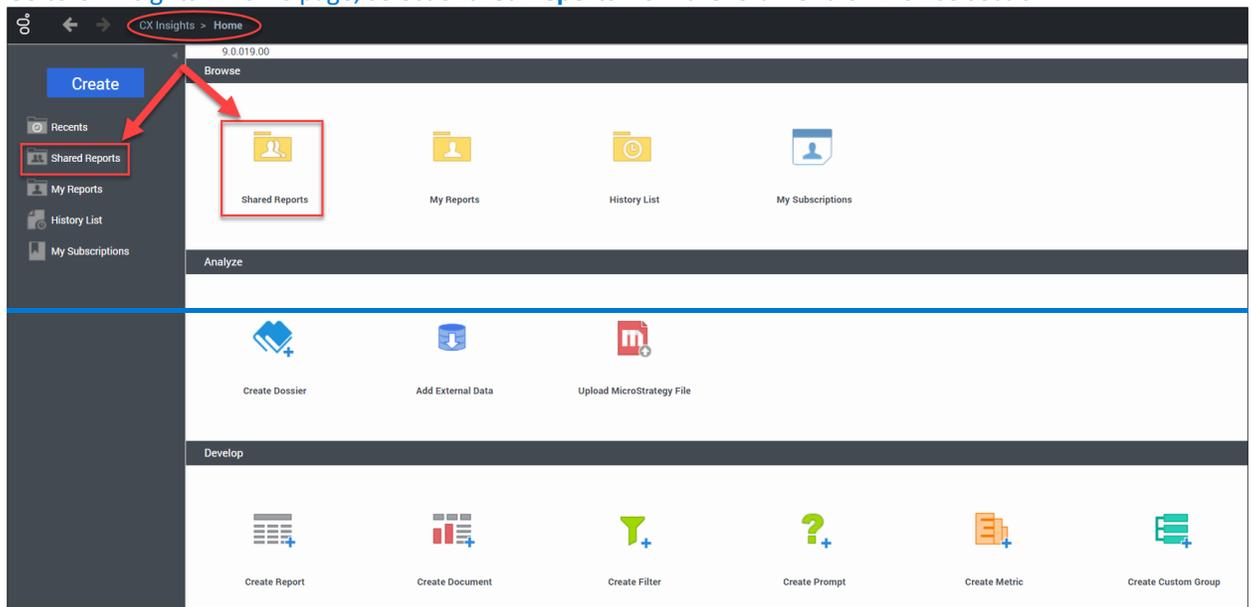
Reports can be delivered automatically to a History List Subscription or E-mail Subscription. Delivery of the reports can be scheduled to take place at regularly scheduled times or when a specific event occurs. To do this, a subscription to the desired report needs to be created.

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

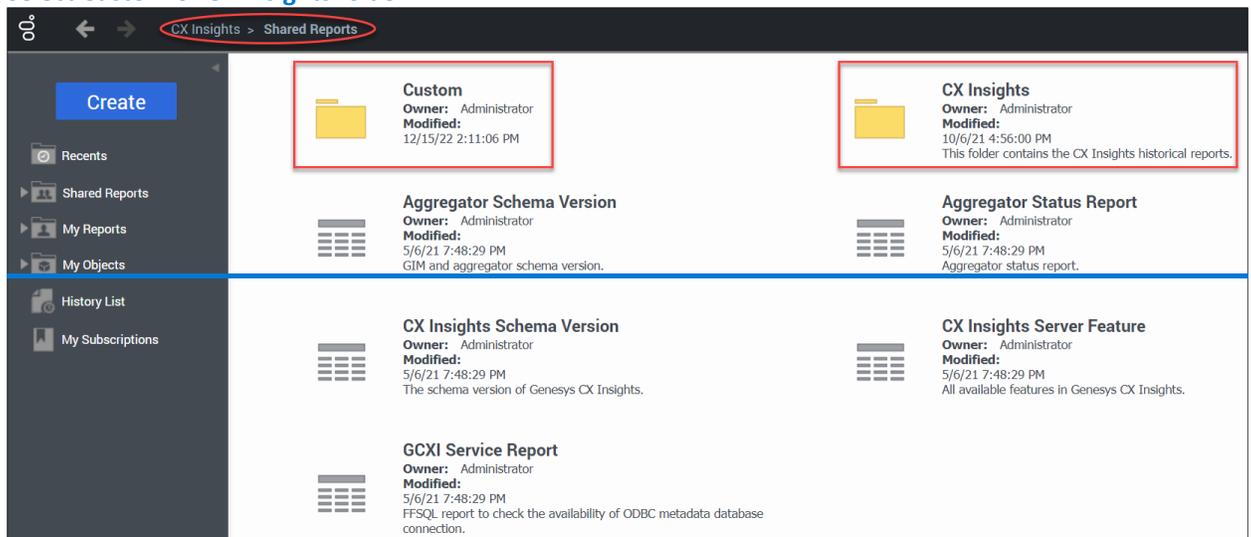
9.2.2.1 Email Subscription

To create an Email Subscription:

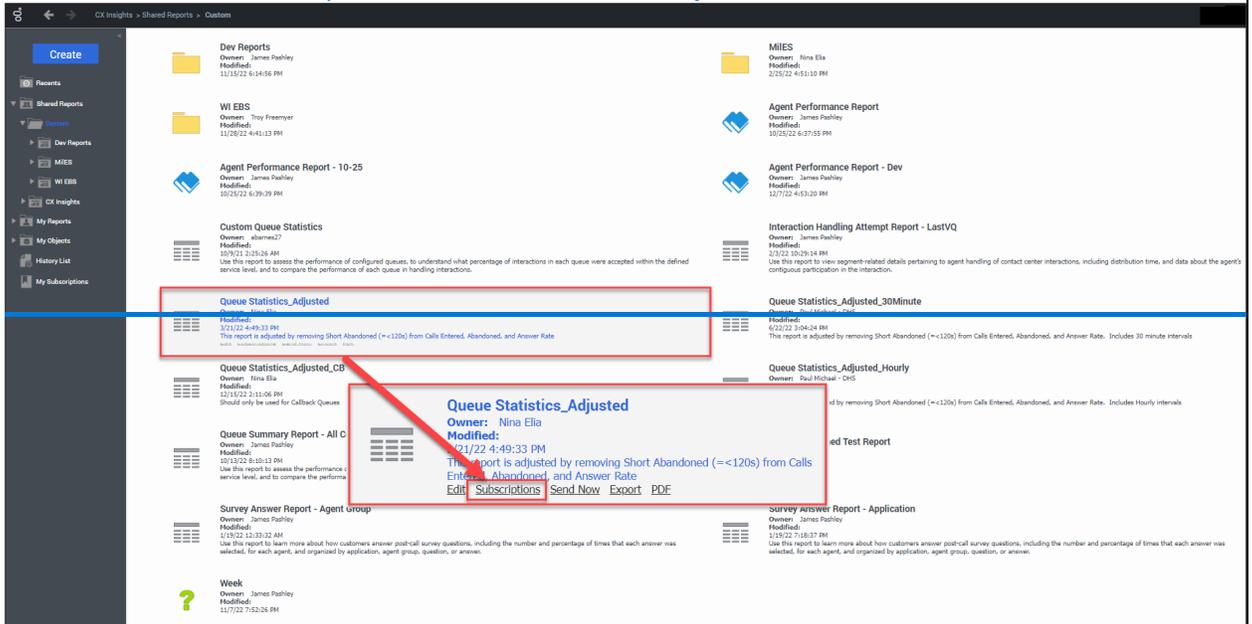
1. Go to CX Insights > Home page, select **Shared Reports** from the left menu or Browse section.



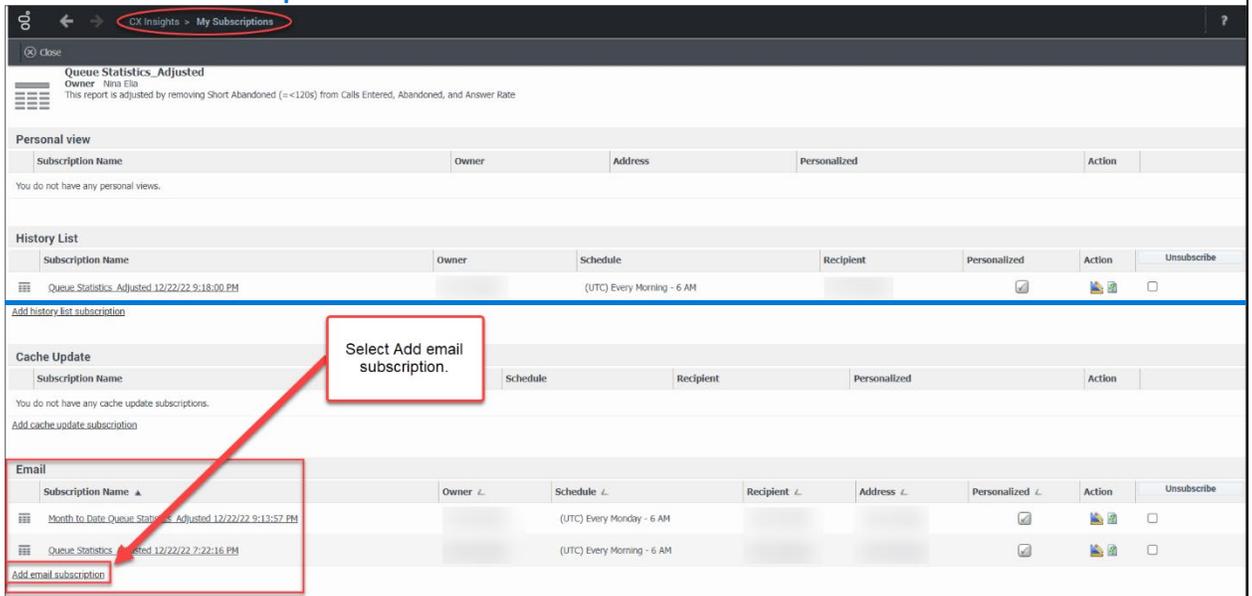
2. Select **Custom** or **CX Insights** folder.



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



4. Select **Add email subscription**.



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

00° 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 email address before creating a subscription or contact administrator.

Send: Data in email

Delivery Format: Excel Compress contents Expand page-by fields

File Name: Queue Statistics_Adjusted (&Date)

Burst...

Subject: Queue Statistics_Adjusted (&Date)

Message:

Send a preview now

Advanced Options

Compression

Password protect zip file

Zip File Name: Queue Statistics_Adjusted

Delivery

Do not deliver after

Use contact security for each contact group member

Recipients Browser

Shared List

Search for:

Available:

To:

Cc:

Bcc:

Address Name: Physical Address: Device: Generic email

Add To Recipients

OK Cancel

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

- 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.
- To:** Select this button to add recipients to the subscription. In the Recipients Browser, the user searches for recipients. If the recipient is not found the user can add the name of the recipient in the Address Name field and the email address in the Physical Address Name field. The default "Generic Email" under Device can remain. Select the user and move to one

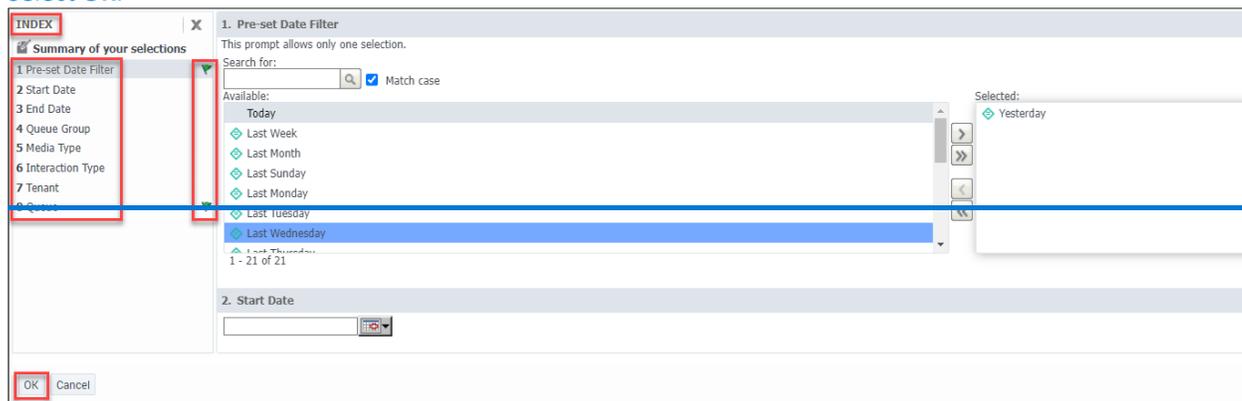
of the following fields, To:, Cc:, BCC: and select **OK**. Multiple recipients can be added to each field.

4. **Send:** Default option, Data in email, is the preferred method.
 5. **Delivery Format:** Preferred delivery format is Excel.
 6. **File Name:** This field is editable and can be changed. Additional tags can be added to the file name, such as a date. To add the date, enter {&Date} after the file name. To view other available shortcuts hover over the blue details icon.
 7. **Subject:** This field is editable and can be changed. Additional tags can be added to the subject, such as date. To add the date, enter {&Date} after the file name. Each time the report is generated and sent to the recipients email the date displayed at the end of the report name is the date the report is run not the date of the data. To view other available shortcuts hover over the blue details icon.
 8. **Message:** Enter desired message or leave blank.
 9. **Send a preview now:** To view the email immediately instead of waiting for the specified run time select this checkbox.
 10. **Advanced Options:** Here the user can choose to send as a Zip password protected file. Since none of the reports contain PII it is not necessary to protect these files with a password.
6. Select filters in the INDEX section. There are eight prompt selections to choose filters for: Pre-set Date Filter, Start Date, End Date, Queue Group, Media Type, Interaction Type, Tenant, and Queue. Filters vary based on the chosen report.

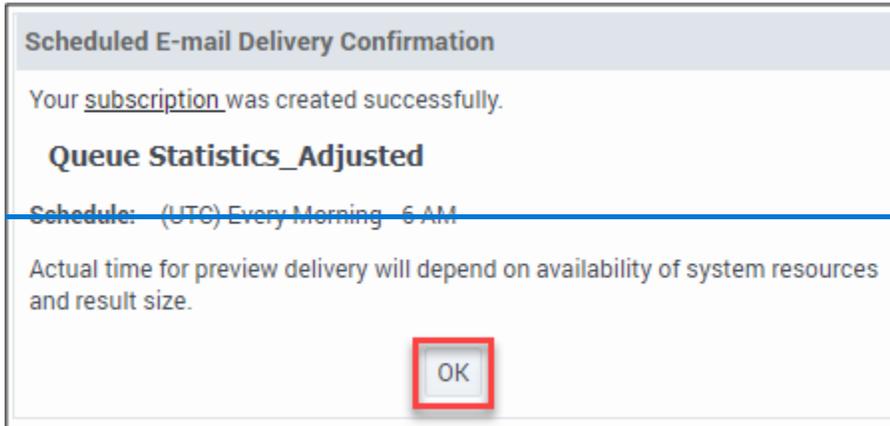
Displayed green flag means there are filters chosen for that prompt.

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

Select **OK**.



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



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

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

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



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

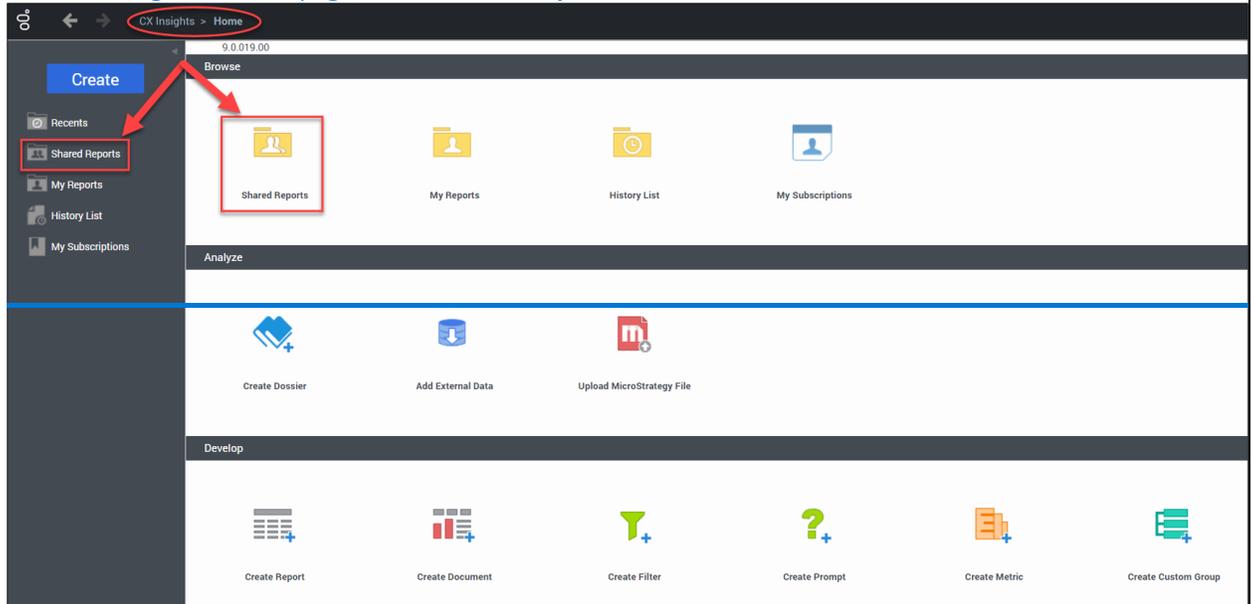
Tenant	Media Type	Queue	Interaction Type	Day	Adj Entered	Accepted Agent	Adj Abandoned	Routed Other	Rejected	Adj Answer Rate	ASA	Avg. Talk Time	Avg. Hold Time	Avg. Handle Time	Max Accept Time (Fmt)
			Inbound	2022-12-21	109	97	11	1	6	89.0%	0:04:40	0:10:18	0:00:13	0:10:38	0:46:35
			Inbound	2022-12-21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

9.2.2.2 History List Subscription

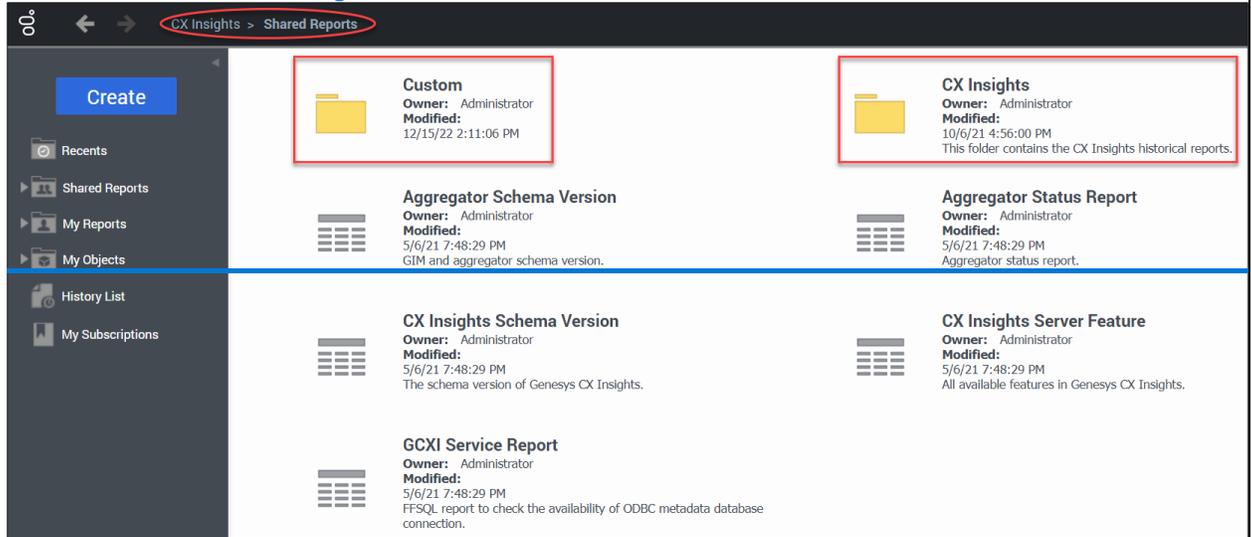
History list subscription saves a copy of the filtered report to the user's Reporting History List. The user can run the filtered report directly from the history list. A History List Subscription can be configured to send users an email every time the report is run. The email contains a link to the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

To Create a History List Subscription:

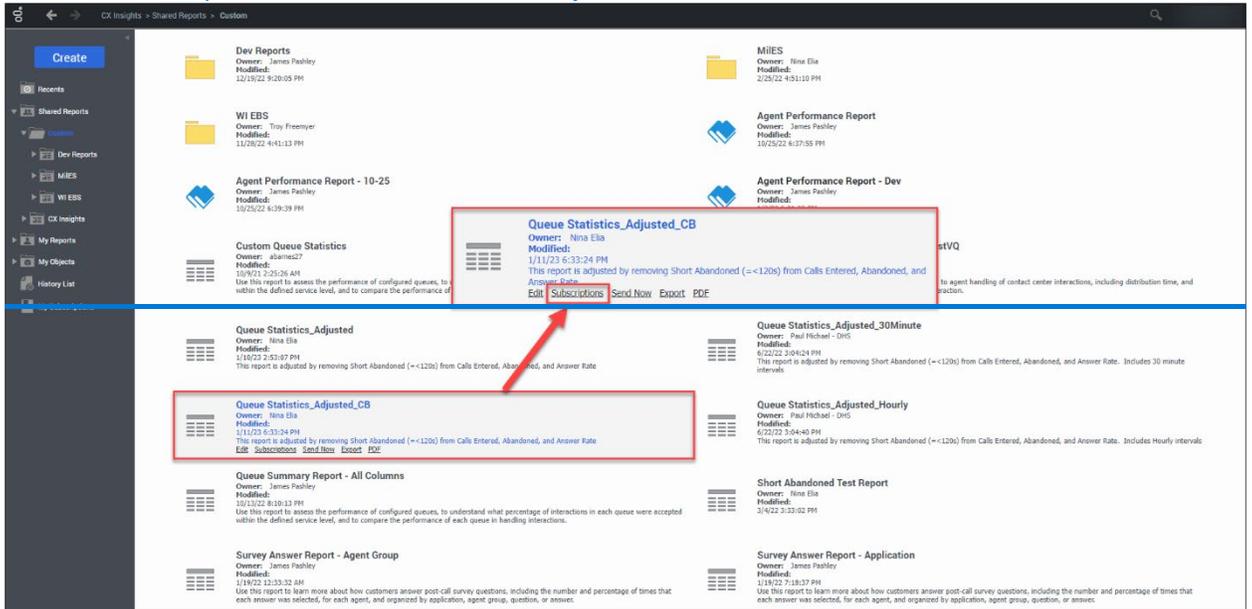
1. Go to CX Insights > Home page, select **Shared Reports** from the left menu or Browse section.



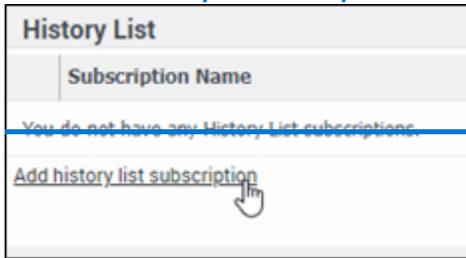
2. Select the **Custom** or **CX Insights** folder.



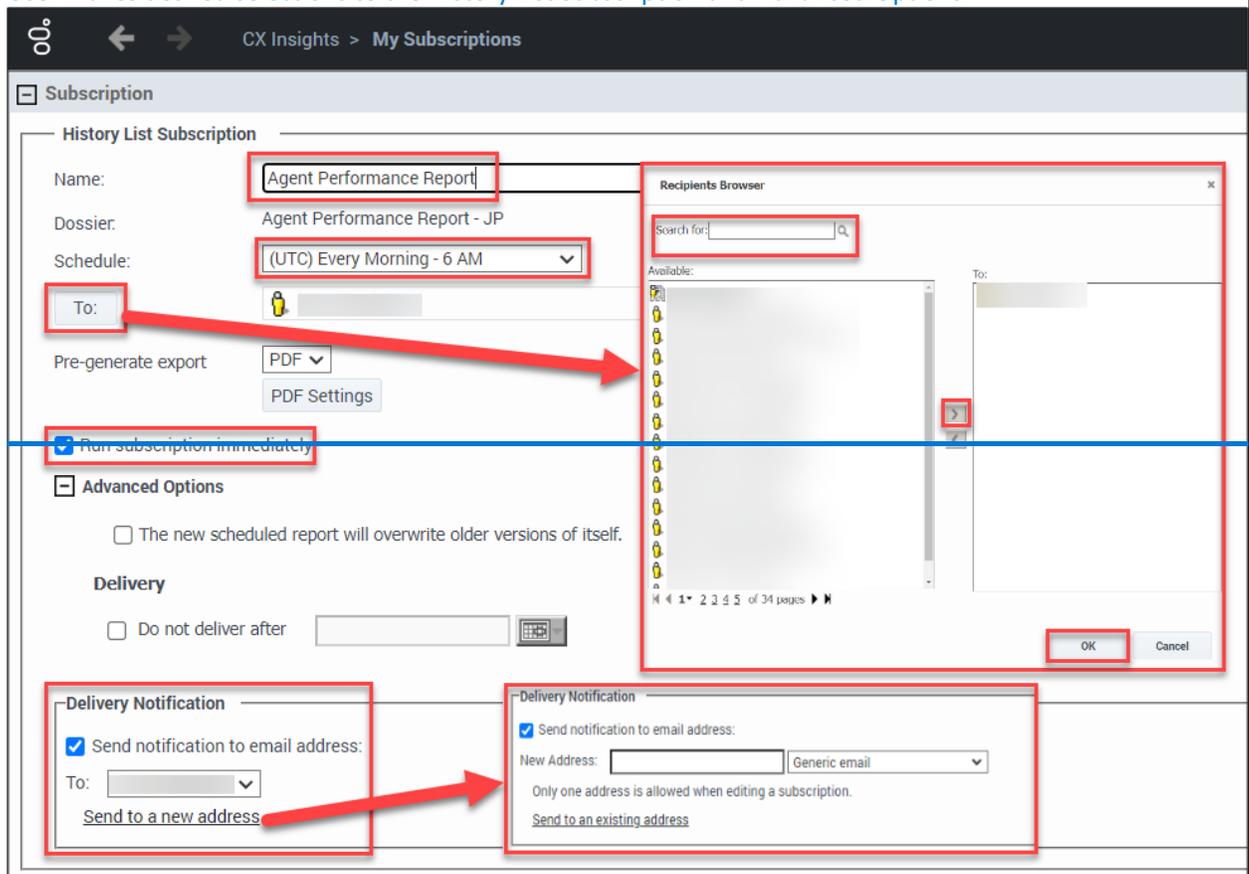
3. Hover over the report of choice and select **Subscriptions**.



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



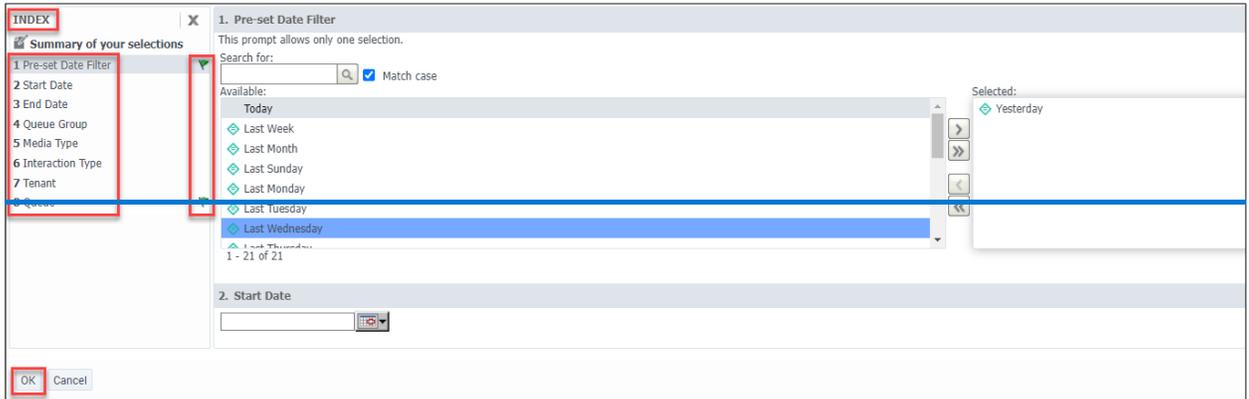
5.—User makes desired selections to the History List Subscription and Advanced Options.—



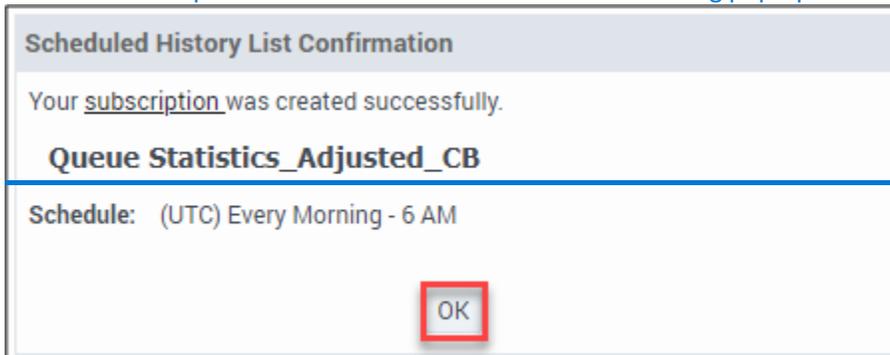
When making selections on this page pay attention to the following fields:-

- 1.— **Name:** enter a name for the subscription. This is the name of the subscription for the user's reference and appears in "My Subscriptions" list. By default, the name of the generated report is displayed.—
- 2.— **Schedule:** from the drop down select a frequency of the report. Notice the time zone used to generate the subscription is based on Coordinated Universal Time (UTC). If "(UTC) Every Morning - 6AM" is selected the report is ready at midnight Central Standard Time (CST). Do not generate reports hourly.—
- 3.— **To:** select this button to add recipients to the subscription.—
- 4.— **Run subscription immediately:** select this and the system delivers a test report immediately.—
- 5.— **Delivery Notification:** to have a notification email sent when the report or document is delivered, select the "Send notification to email address" checkbox, then do one of the following:-
 - i.— To send the notification to an email address that has already been defined, select an address from the "To" drop down list.—
 - ii.— To send the notification to a new email address, in the New Address field, type the email address of the user to send a delivery notification to and select the email client type of the specified email address from the drop-down list.—

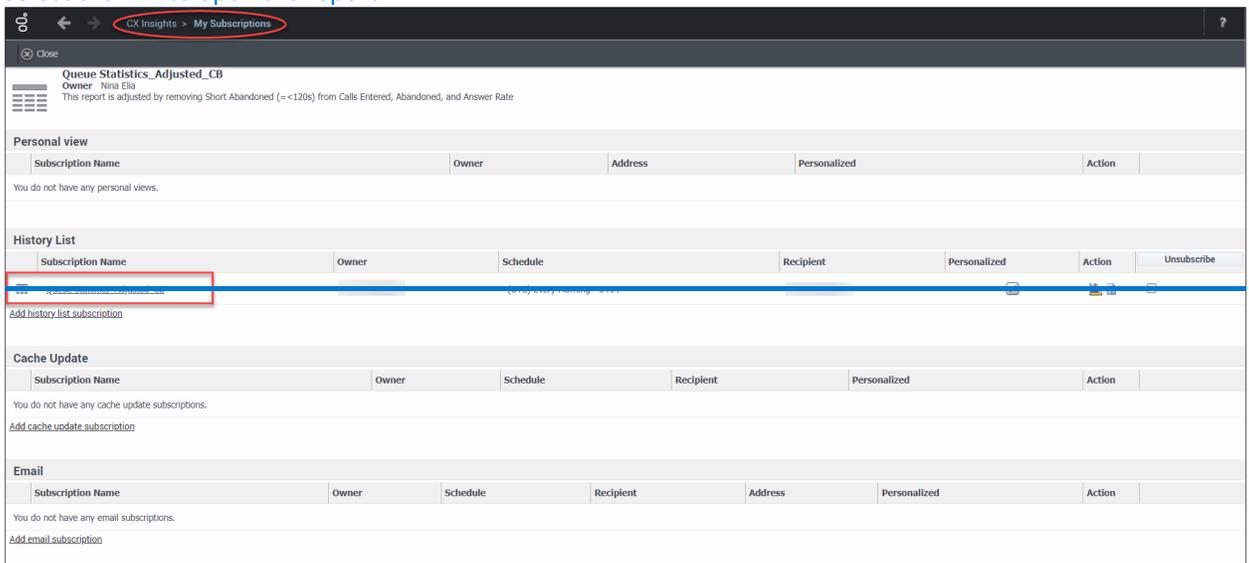
6. Select filters in the INDEX section. There are eight prompt selections to choose filters for: Pre-set Date Filter, Start Date, End Date, Queue Group, Media Type, Interaction Type, Tenant, and Queue. Filters may vary based on the chosen report. Displayed green flag means, there are filters chosen for that prompt. Search feature is case sensitive. Uncheck "Match case" when using the search feature. Select OK.



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



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



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

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

The screenshot shows the 'Queue Statistics_Adjusted_CB' report in the CX Insights application. The interface includes a navigation menu on the left with categories like 'Day', 'Interaction Type', 'Media Type', 'Queue', and 'Tenant'. The main content area displays 'REPORT OBJECTS', 'REPORT DETAILS' (including filters and prompts), and a data table with columns for various metrics.

Tenant	Media Type	Queue	Interaction Type	Day	Adj Entered	Accepted Agent	Adj Abandoned	Routed Other	Rejected	Adj Answer Rate	ASA	Avg. Talk Time	Avg. Hold Time	Avg. Handle Time	Max Accept Time (Fmt)
Environment	Voice	_Esp_VQ_CB_OUT	Outbound	2023-01-10	33	24	6	0	3	72.7%	00:13.28	00:19.12	00:00.00	00:19.27	00:36.13
		_Gen_VQ_CB_OUT	Outbound	2023-01-10	1,677	1,593	21	0	63	95.0%	00:00:37	00:13.14	00:02:25	00:15:57	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.

The screenshot shows the CX Insights Home page. The left navigation menu has 'My Subscriptions' highlighted. The main content area shows a 'Browse' section with icons for 'Shared Reports', 'My Reports', 'History List', and 'My Subscriptions'. A red arrow points from the 'My Subscriptions' icon in the left menu to the 'My Subscriptions' icon in the 'Browse' section.

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

History List Subscriptions							
Subscription Name	Report/Document	Owner	Schedule	Recipient	Personalized	Action	Unsubscribe
Queue Statistics_Adjusted	Queue Statistics_Adjusted		(UTC) Every Morning - 6 AM	Multiple	<input checked="" type="checkbox"/>		<input type="checkbox"/>
Queue Statistics_Adjusted_CB	Queue Statistics_Adjusted_CB		(UTC) Every Morning - 6 AM		<input checked="" type="checkbox"/>		<input type="checkbox"/>

E-mail Subscriptions								
Subscription Name	Report/Document	Owner	Schedule	Recipient	Address	Personalized	Action	Unsubscribe
Month to Date Queue Statistics_Adjusted 12/22/22 9:13:57 PM	Queue Statistics_Adjusted		(UTC) Every Monday - 6 AM			<input checked="" type="checkbox"/>		<input type="checkbox"/>
Queue Statistics_Adjusted	Queue Statistics_Adjusted		(UTC) Every Morning - 6 AM	Multiple		<input checked="" type="checkbox"/>		<input type="checkbox"/>

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

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: [dropdown]

Send: Data in email

Delivery Format: Excel Compress contents

File Name: Queue Statistics_Adjusted {&Date} *i* Delimiter: *i*

Burst... [input]

Subject: Queue Statistics_Adjusted {&Date} *i*

Message: [input] *i*

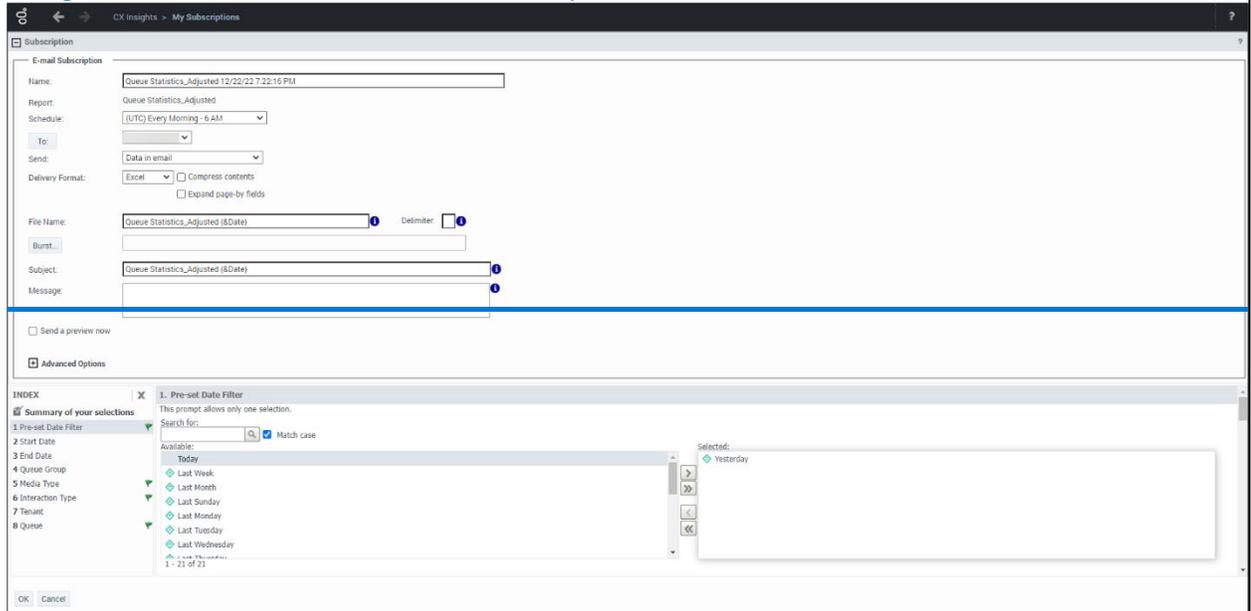
Send a preview now

Advanced Options

Personalization

OK Cancel

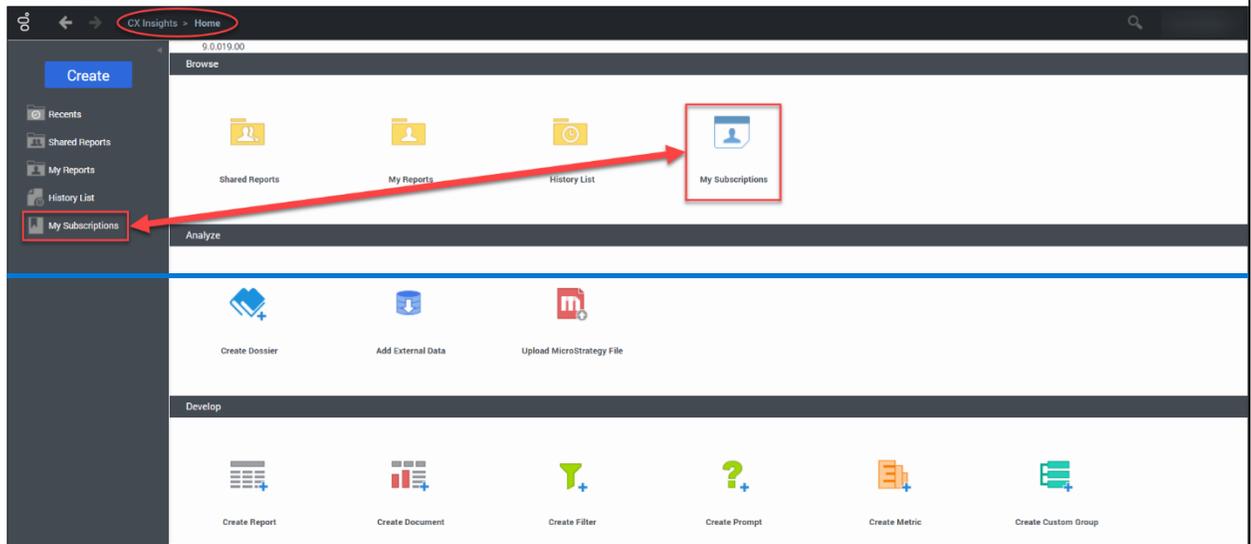
4. To change previously selected filter options, open the Personalization link. Filter selections can be changed in the INDEX section. After edits are complete select **OK**.



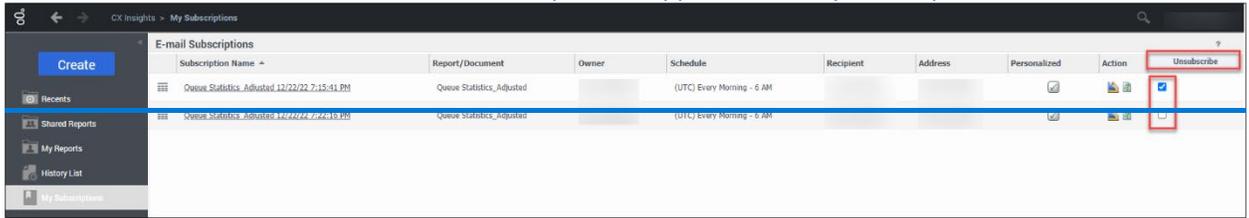
9.2.4 Unsubscribing from Subscriptions

(Video instructions available: [Unsubscribing from Subscriptions](#))

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



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



9.2.5 Recommended Queue and Agent Reports

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

- Agent Performance Report V2.0 (see [Section 9.2.5.1 Agent Performance Report V2.0](#))
- Queue Statistics Adjusted (also available in 30 minute and hourly intervals) (see [Section 9.2.5.2 Queue Statistics Adjusted](#))
- Queue Statistics Adjusted CB (Callback) (only available in hourly intervals) (see [Section 9.2.5.3 Queue Statistics Adjusted CB](#))

9.2.5.1 Agent Performance Report V2.0

Agent performance report gives a summary and daily detail of agent performance statistics. This report is only recommended as a History List Subscription. See [Section 9.2.2.2 History List Subscription](#) with details on how to subscribe to a history list.

The agent performance report has two tabs:

- Agent Performance — Summary tab provides a summary of agent performance statistics. [Show/Hide an example of this report](#)
- Agent Performance — Daily tab provides agent performance statistics day over day. [Show/Hide an example of this report](#)

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

Basic Terminology

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

Statistics Definitions

Statistic Name	Description	Format
Accepted—Total	Total calls accepted inbound and outbound	Count
Accepted Inbound	Total inbound calls (via the IVR) answered by the agent	Count
Not Accepted	Total calls offered to the agent that were not answered	Count
ACD Handle Time (Mins)	Total minutes of inbound handle time Talk+Hold+ACW (wrap)	Minutes
ACD Talk Time (Mins)	Total inbound talk time (excludes hold time)	Minutes
ACD Hold Time (Mins)	Total inbound hold time	Minutes
ACD Wrap Time (Mins)	Total inbound wrap time (timed ACW)	Minutes
Avg ACD Handle Time (Mins)	$(Total\ ACD\ Handle\ Time) / (Total\ ACD\ accepted\ calls)$	Minutes
Avg ACD Talk Time (Mins)	$(Total\ ACD\ Talk\ Time) / (Total\ ACD\ accepted\ calls)$ Average talk time for each call	Minutes
Avg ACD Hold Time (Mins)	$(Total\ ACD\ Hold\ Time) / (Total\ ACD\ accepted\ calls)$ Average hold time for each call	Minutes
Avg ACD Wrap Time (Mins)	$(Total\ ACD\ Wrap\ Time) / (Total\ ACD\ accepted\ calls)$ Average wrap time for each call	Minutes
% ACD Talk Time	$(Total\ ACD\ Talk\ Time) / (Total\ ACD\ Handle\ Time)$ Talk time, as a percentage of handle time	Percent
% ACD Hold Time	$(Total\ ACD\ Hold\ Time) / (Total\ ACD\ Handle\ Time)$ Hold time, as a percentage of handle time	Percent
% ACD Wrap Time	$(Total\ ACD\ Wrap\ Time) / (Total\ ACD\ Handle\ Time)$ Wrap time, as a percentage of handle time	Percent
Accepted Outbound	Total outbound calls (including callback calls) made/answered by the agent	Count

Out Handle Time (Mins)	Total minutes of outbound handle time Talk+Hold+After Call Work (wrap)	Minutes
Out Talk Time (Mins)	Total outbound talk time (excludes hold time)	Minutes
Out Hold Time (Mins)	Total outbound hold time	Minutes
Out Wrap Time (Mins)	Total outbound wrap time (timed after call work)	Minutes
Avg Out Handle Time (Mins)	$(Total\ Out\ Handle\ Time) / (Total\ Out\ accepted\ calls)$	Minutes
Avg Out Talk Time (Mins)	$(Total\ Out\ Talk\ Time) / (Total\ Out\ accepted\ calls)$ Average talk time for each call	Minutes
Avg Out Hold Time (Mins)	$(Total\ Out\ Hold\ Time) / (Total\ Out\ accepted\ calls)$ Average hold time for each call	Minutes
Avg Out Wrap Time (Mins)	$(Total\ Out\ Wrap\ Time) / (Total\ Out\ accepted\ calls)$ Average wrap time for each call	Minutes
Calls per Busy Hour	Number of calls handled for every hour the agent is something other than a "Not Ready" state.	Count
Extended ACW Per Call (Mins)	$(Total\ Extended\ ACW) / (Total\ ACD\ Calls)$	Minutes
Login Time (Hrs)	Total time agent was logged into the system	Hours
Busy Time (Hrs)	$Login\ Time - Not\ Ready\ Time$ Total time on calls or waiting for calls	Hours
Ready Time (Hrs)	Total time agent was in a "Ready" state	Hours
Wrap Time (Hrs)	Total time agent was in ACW state	Hours
Not Ready Time (Hrs)	Total time an agent was in any "Not Ready" state Regardless of reason code	Hours
Not Ready- <<Reason Code>> (Hrs)	Separate stat for each reason code—Total time an agent was in each Not Ready reason code	Hours

Busy Time	Refers to any time an agent is logged in AND, in any state, other than a “Not Ready” state, excluding Extended After Call Work (that is, Extended After Call Work is included in Busy Time)	Hours
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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

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

Statistics Definitions

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

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

9.2.5.4 Queue Voicemail Counts

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

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

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

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

Statistics Definitions

Statistic Name	Description	Format
Tenant	Defaults to Environment	Text
Media Type	Defaults to Voice	Text
Queue	Queue name	Text
Interaction Type	Inbound or Outbound	Text
Day	Date of statistics	yyyy-mm-dd
Routed to VM	Total calls that were sent to voicemail	Count

10 Local Passwords

10.1 Setting a Local Password (Video instructions available: [Setting a Local Password](#))

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

10.1 Setting a Local Password

(Video instructions available: [Setting a Local Password](#))

To set up a local password:

1. Open the [Genesys Portal](#) with Firefox, Edge, or Chrome.
2. Select **Platform Administration** to open the log in screen.



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

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

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

11 Troubleshooting

[11.1 Accessing Genesys Troubleshooting](#)

[11.2 Status Troubleshooting](#)

[11.3 Recording Search Troubleshooting](#) (Video instructions available: [Recording Search Troubleshooting](#))

[11.4 Call Handling Troubleshooting](#)

[11.5 Supervisor and Administrator Troubleshooting](#)

[11.6 Submitting a Genesys Support Ticket](#) (Video instructions available: [Submitting a Genesys Support Ticket](#), [Escalating a Genesys Support Ticket](#))

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

If you run into an issue:

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

11.1 Accessing Genesys Troubleshooting

Issue	Description	Resolution
Portal won't load	Genesys portal is not opening through the link on the gateway page	<ul style="list-style-type: none"> • Refresh the Genesys portal page after it fails to open. • Clear browser history. • Select this link to go directly to the Genesys Portal page. • Try opening the Genesys Portal Page in a different browser (Chrome, Firefox or Edge). • Save the portal as a favorite in the browser.
White Label Error	White Label Error displaying when attempting to access the agent page.	<ul style="list-style-type: none"> • Clear browser history. • Select this link to go directly to the Genesys Portal page. • Open the Genesys Portal Page in a different browser (Chrome, Firefox or Edge). • Save the portal as a favorite in the browser.
	Agent Desktop log-in:	<ul style="list-style-type: none"> • All Genesys user IDs are case sensitive. Please ensure use of the correct case.

Can't log in, invalid credentials		<ul style="list-style-type: none"> • Be sure to use the correct Tenant: sowi.mgep.info
	Platform Administration:-	<ul style="list-style-type: none"> • All Genesys user IDs are case sensitive. Please ensure use of the correct case. • All users are given a temporary password for Platform Administration when their account was created. If the temporary password is unknown, the user must submit a ticket to the Wisconsin Help Desk. See Section 11.6 Submitting a Genesys Support Ticket.
	Designer log-in:-	<ul style="list-style-type: none"> • 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	<ul style="list-style-type: none"> • See Section 2.3 Forgotten Credentials for instructions to recover a WAMS user ID or password.

11.2 Status Troubleshooting

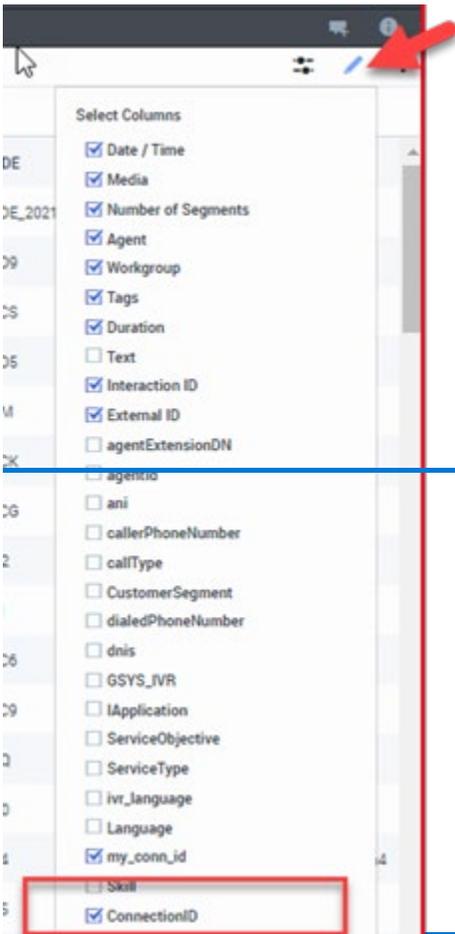
Issue	Description	Resolution
Not receiving calls in "Ready" status	Not receiving calls while in "Ready" state	<ul style="list-style-type: none"> • Submit a ticket to the Wisconsin Help Desk. See Section 11.6 Submitting a Genesys Support Ticket.
Stuck in "Busy" status	Stuck in "Busy" status and not able to change to "Ready"	<ul style="list-style-type: none"> • Submit a ticket to the Wisconsin Help Desk. See Section 11.6 Submitting a Genesys Support Ticket.
Unexpected Status Changes	Selected Status of "Ready" unexpectedly changes to "Not Ready" (No Reason Code)	<p>Genesys is unable to complete a call to the agent. This may be caused by:</p> <ul style="list-style-type: none"> • Problems with the agent's phone or phone system. • Routing issues with the long distance carrier between Genesys and the agent. <p>Troubleshooting:</p> <ul style="list-style-type: none"> • 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:

	<p>changes to "Not Ready" (No Answer)</p>	<ul style="list-style-type: none"> • Agent not answering a call that rang to their phone. • Agent's phone did not ring when the call was offered. <p>Troubleshooting:</p> <ul style="list-style-type: none"> • 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.
	<p>Logged out of Agent Desktop for inactivity.</p> <p>Show/Hide example image</p>	<p>Most times this is due to a setting in Chrome or Edge that puts the tabs to "sleep" if they are idle.</p> <p>Update Chrome Settings</p> <p>Show/Hide Instructions</p> <p>Update Edge Settings</p> <p>Show/Hide Instructions</p>
	<p>Agent is unexpectedly logged off or their status is changed to "Logged Off"</p>	<p>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.</p> <p>Troubleshooting:</p> <ul style="list-style-type: none"> • Follow your local process for contacting local IT to troubleshoot network connectivity.

11.3 Recording Search Troubleshooting

(Video instructions available: [Recording Search Troubleshooting](#))

Issue	Description	Resolution
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<p>No-Connection ID in search results-</p>	<p>Connection ID column doesn't appear-</p>	<ul style="list-style-type: none"> • Add the Connection ID by clicking "Select Columns" icon- 
<p>Unknown Connection ID-</p>	<p>Don't have Connection ID to search-</p>	<ul style="list-style-type: none"> • Search by Agent and date-
<p>Missing Recording-</p>	<p>Can't find recording in "Interaction Recording" search or the ECF-</p>	<ul style="list-style-type: none"> • There is a delay while recordings are indexed of approximately 20 minutes- • If the telephonic signature is missing in the ECF, see Section 7.2.3 Telephonic Signature Recording Missing in the ECF-

11.4 Call Handling Troubleshooting

Issue	Description	Resolution
<p>Telephonic Signature/Automated</p>	<p>Entering the prompt ID and other commands in-ATS-System may</p>	<ul style="list-style-type: none"> • Generally, using your phone to enter these commands is recommended. However, you can

Telephonic Signature (ATS)	respond with “Invalid Entry.”	<p>try to use the keypad provided with the Genesys Agent Desktop application.</p> <ul style="list-style-type: none"> • 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?	<ul style="list-style-type: none"> • 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?	<ul style="list-style-type: none"> • A new process for telephonic signature is in place. • Training for IM workers to complete a telephonic signature is available via the learning center. • Process Help 1.6.8
Problems with outbound calling	Making a call to an external phone number	<ul style="list-style-type: none"> • 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	<p>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.</p> <ul style="list-style-type: none"> • 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. <p>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.</p> <ul style="list-style-type: none"> • 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.”

		<ul style="list-style-type: none"> • If the agent’s phone delivers a busy signal, the agent’s status will automatically change to “Not Ready” (No Reason Code).
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11.5 Supervisor and Administrator Troubleshooting

Issue	Description	Resolution
Monitor tab in Agent Desktop not visible	Monitor tab is not visible	<ul style="list-style-type: none"> • 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	<ul style="list-style-type: none"> • 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	<ul style="list-style-type: none"> • 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	<ul style="list-style-type: none"> • 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. [11.6.1 Who Should Submit a Ticket?](#)
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: dhsgenesyscloudproject@dhs.wisconsin.gov

Examples of general questions include:

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

11.6.1 Who Should Submit a Ticket?

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

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

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

11.6.2 Opening a Ticket

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

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

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

Subject Line

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

Do	Don't
<ul style="list-style-type: none">• "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"	<ul style="list-style-type: none">• "Genesys"• "Problems"• "Genesys Issue"• "Genesys isn't working"• "Trouble with Genesys"

Description

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

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

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

[Show/Hide Example email ticket](#)

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

11.6.3 Escalation Process

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

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

Critical or high priority issues are defined as:-

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