

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 25-01**

Release Date: 04/09/2025

Effective Date: 04/09/2025

EFFECTIVE DATE	The following policy additions or changes are effective 04/09/2025 unless otherwise noted. Underlined text denotes new text. Text with a strike through it denotes deleted text.
POLICY UPDATES	
2.4 Select or Change Phone	Updated text and images to include WebRTC phone option.
3.1 Agent Desktop Content Viewer	Updated text and images to support interface update.
3.1.1 Communications Sidebar and Main Menu	Added subsection number and updated images.
3.1.2 Directory	Added subsection number and updated images.
3.1.3 Communications Sidebar	Added subsection number and updated images.
3.2 Performance	Updated table of contents to include new section.
3.2.5 Exporting, Scheduling and Expiring Reports	New section.
4.1.1 Go On Queue	Updated text and images to support user interface update.
4.1.1.1 Notification of Call	Updated text and images to support WebRTC and the user interface update.
4.1.1.2 Ending a Call	Updated text and images to support WebRTC and the user interface update. Updated formatting to align style.
4.1.2.1 Receiving a Practice Call From the Queue	Updated text and images to support WebRTC and the user interface update.
4.2 Making an Internal (Genesys User to Genesys User) Call	Updated section title, text, and images to support user interface update.

4.2.1	Ending an Internal Call	Added subsection number.
4.3	Making an External Call	Updated text and image to support user interface update.
4.3.1	Ending a Call	Updated text and images to support WebRTC and the user interface update.
4.4	Placing a Call on Hold	Updated images to support user interface update and added a note.
4.5	Transferring a Call	Updated image to support user interface update.
4.5.2	Transferring a Call to a Genesys Agent	Updated image to support user interface update and added a note.
4.6.1	Start a Conference	Updated image to support user interface update.
4.6.2	Place a Conferenced Party on Hold or Remove Them From the Call	Updated image to support user interface update.
4.7	Consult	Updated image to support user interface update.
4.7.1	Place a Party on Hold or Remove Them From the Call	Updated image to support user interface update.
4.7.2	Transfer the Second Party to the Third Party	Updated text and images to support user interface update.
4.7.3	Bring All Parties Together in a Conference Call	Updated image to support user interface update.
4.8	Expanding the Interactions Pane	Updated text and images to support user interface update.
6	Supervisors	Updated table of contents.
6.1	Introduction to Performance	Updated table of contents and corrected references.
6.1.1	Viewing Agent Performance	Added table of contents, added subsection with existing content, and corrected reference.
6.1.1.1	Default Agent Performance View	Updated image and corrected reference.
6.1.2	Viewing Agent Status	Updated table of contents.
6.1.2.1	Agent Status View	Corrected reference, and updated image.
6.1.2.1.1	Busy Secondary Statuses	New subsection
6.1.3	Viewing Queue Activity	Added table of contents, added subsection with existing content, and corrected reference.
6.1.3.1	Default Queue Activity View	Added subsection with existing content and corrected reference.
6.1.4	Viewing Queue Performance	Added table of contents, added subsection with existing content, and corrected reference.
6.1.4.1	Default Queue Performance View	Added subsection with existing content and corrected reference.

6.1.5	Viewing Interaction Details	Added table of contents, added subsection with existing content, and corrected reference.
6.1.5.1	Default Interactions View	Added table of contents and subsections with existing content.
6.2	Supervising Agent Calls	Updated table of contents.
6.2.1	Coaching and Monitoring Agents	Added table of contents, added subsections with existing content, corrected reference, updated text and images. Removed bold font based on style guide requirements.
6.2.1.1	Selecting a Live Call	Added subsection with existing content and corrected reference.
6.2.1.2	Coaching a Call	Added table of contents and added subsections with existing content.
6.2.1.3	Monitoring a Call	Added subsection with existing content and corrected reference.
6.2.2	Selecting a Call to Review	Added table of contents, added subsections with existing content, corrected reference and updated text. Removed bold font based on style guide requirements.
6.2.2.1	Selecting a Call to Review	New subsection.
6.2.2.2	Downloading a Recorded Call	Corrected reference.
6.2.5	Activate and Deactivate Agents in a Queue	New subsection
7.3	Setting Business Events - Special Messages	Corrected reference
7.8	Disable and Enable Callback	New section
7.8.1	Disable Callback	New section
7.8.2	Enable Callback	New section
10.1	Change Requests	Repurposed reserved chapter with existing content from 11.1.1.
11	Troubleshooting	Requires copy editor fix.
11.1.1	Who Should Submit a Ticket?	Moved some of the content to chapter 10.
11.1.2	Opening a Ticket	Updated text and image. Remove show/hide on this page and keep image visible on load of the page.

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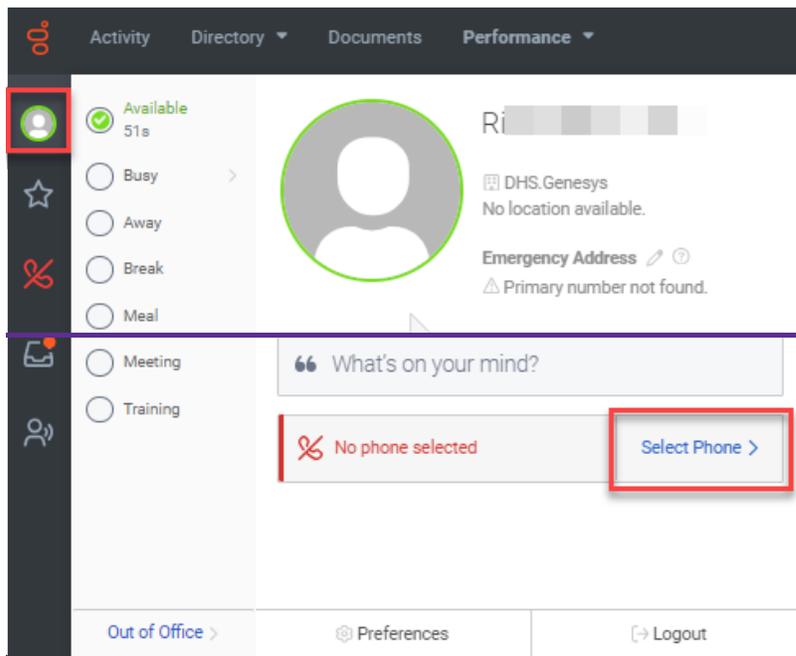
2.4 Select or Change Phone

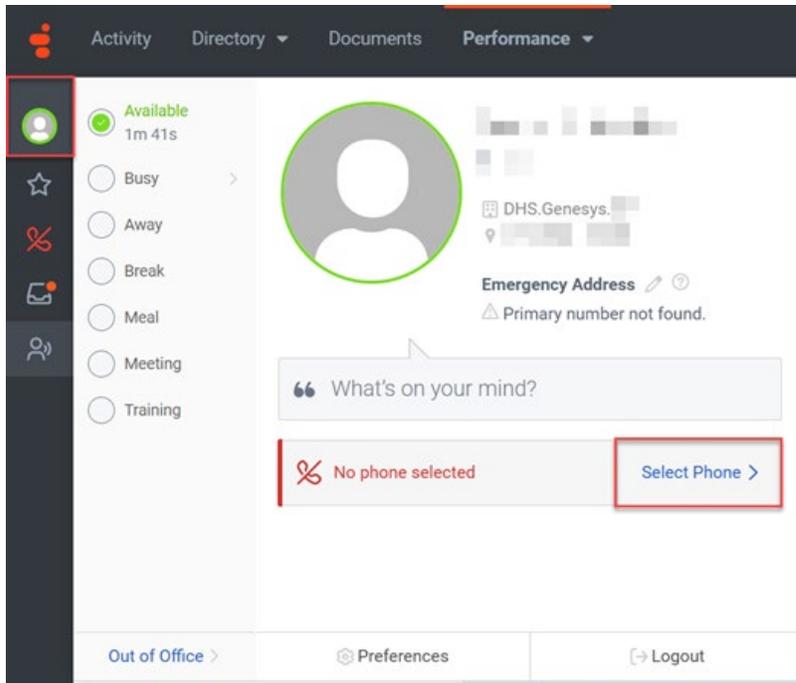
(Video instructions available: [Forgotten Credentials](#))

The first time a user logs in to Genesys, they must select a phone before making or receiving calls. [Users can choose between using an external phone line designated and set up with their Genesys Cloud account, or a WebRTC phone. The Genesys Cloud WebRTC phone runs right from your browser rather than a physical phone.](#) After that, the user can select from assigned phones.

To select a phone:

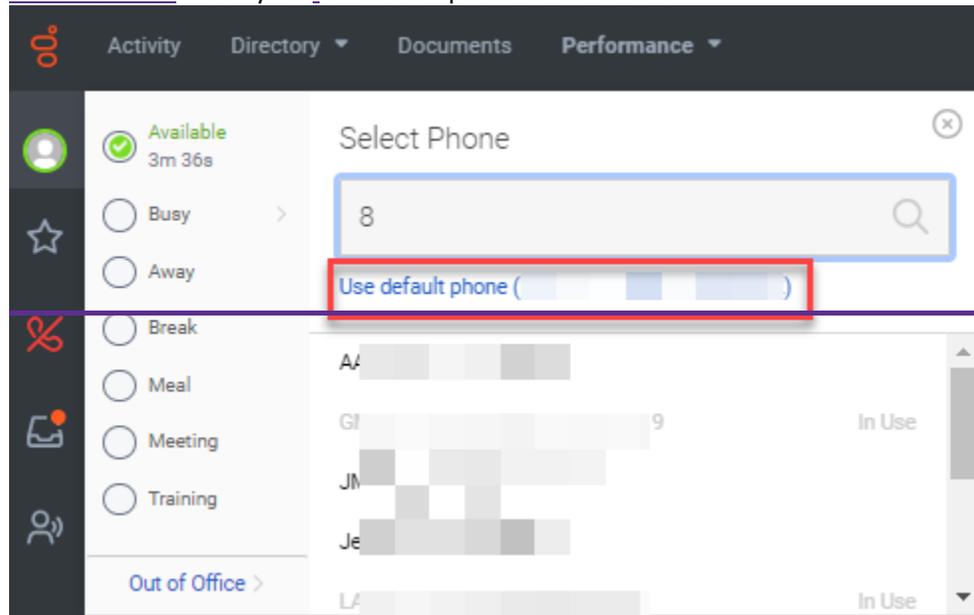
1. Click your profile picture.
2. Click Select Phone to display available phones.





3. Select your defaultSelecting a phone or enter your:

- a. In the search field type one of the following: first initial last name, phone number-and, or WebRTC. Then select your- alternative phone from the list.



- b. If the default phone is preferred select Use default phone.

Activity Directory Documents Performance

Available 5m 49s

Busy

Away

Break

Meal

Meeting

Training

Out of Office >

Select Phone

a

b

Use default phone ()

_WebRTC

Search here to receive a list of alternative phone options.

3.1 Agent Desktop Content Viewer

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

3.1.1 Communications Sidebar and Main Menu

3.1.2 Directory

3.1.3 Communications Sidebar

The content viewer displays buttons, tabs, and links to access most things a user needs in Genesys Cloud. Select the help button in the bottom left corner of the window for help text specific to this view.

3.1.1 Communications Sidebar and Main Menu

The communications sidebar on the left has the profile, favorites, calls, inbox, interactions, and help buttons.

The main menu at the top of the content viewer has the following tabs:

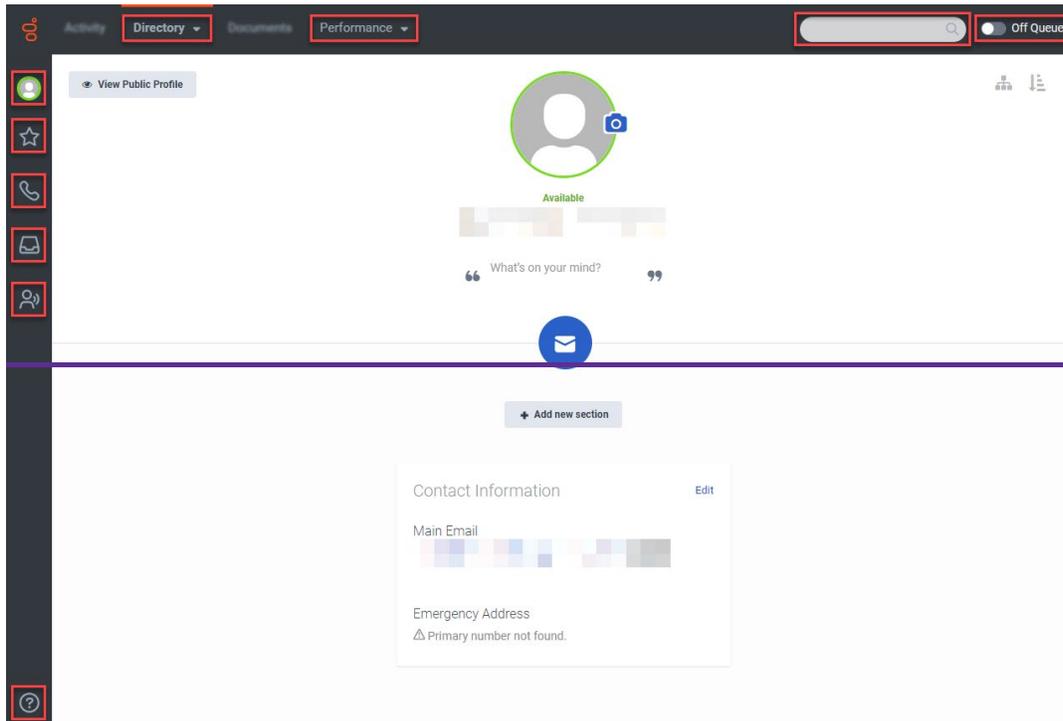
- Directory: Displays contacts
- Performance: Displays time spent on calls and other metrics

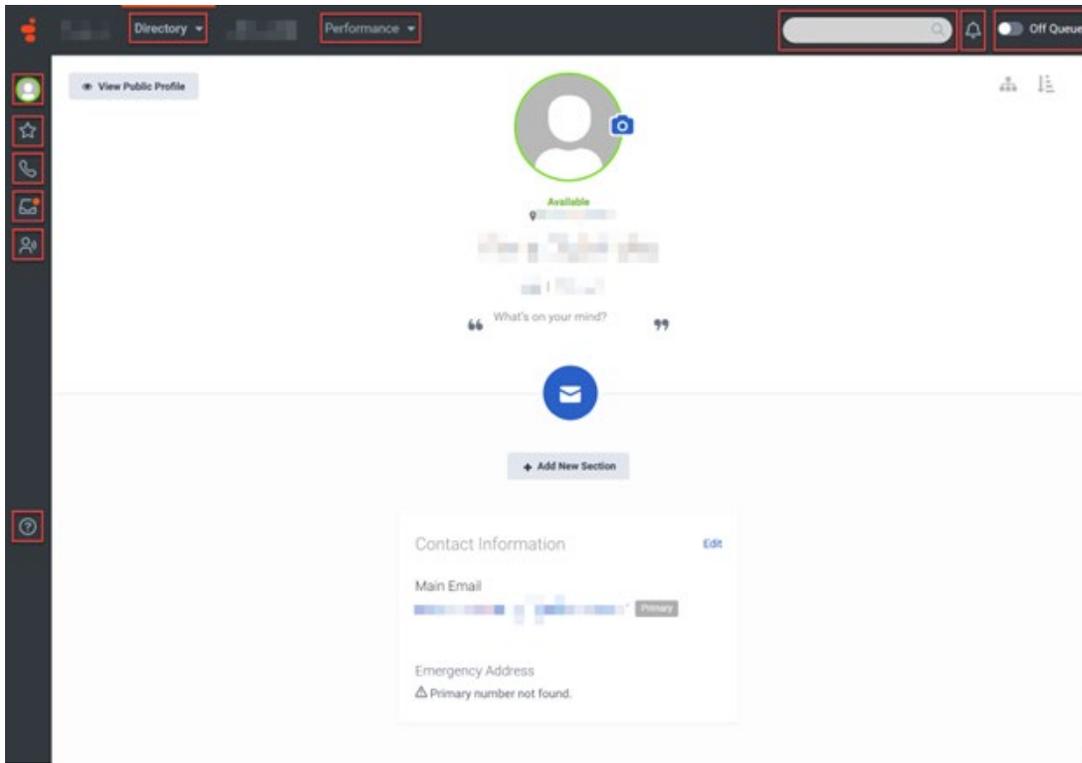
There is also a search box to search My Organization contacts, [an alerts button](#), and a queue toggle for availability to receive queued calls.

~~Note that the Activity and Documents tabs are not used.~~

Note The Activity and Documents tabs are not used.

Expand or hide panes using the expand button  or the hide button  at the top right corner of a pane.

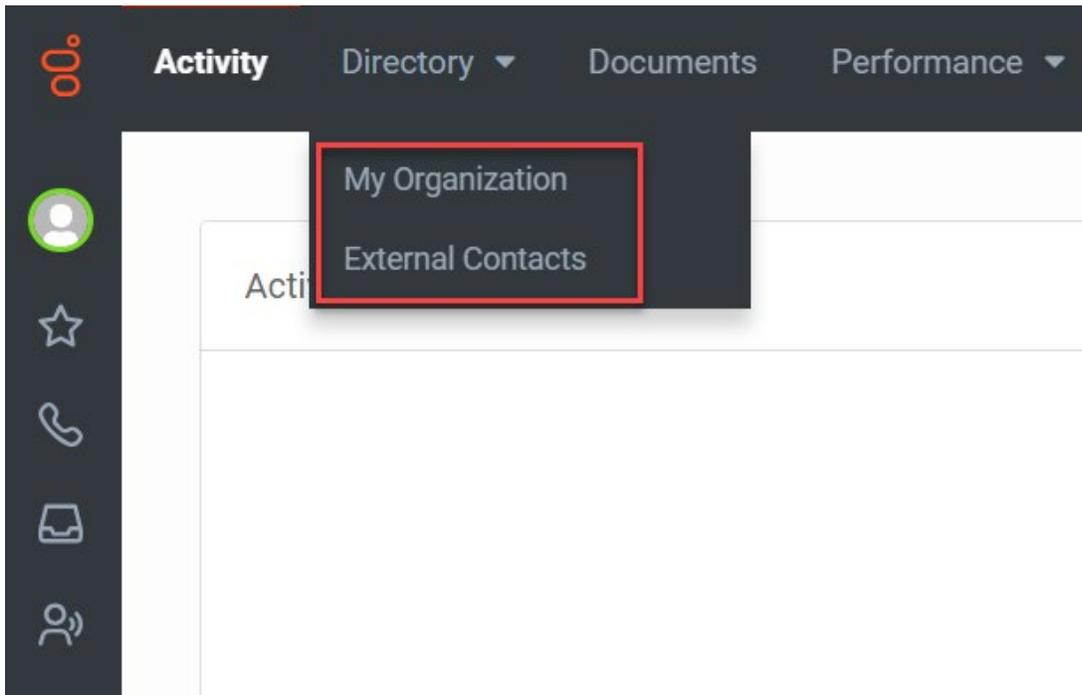




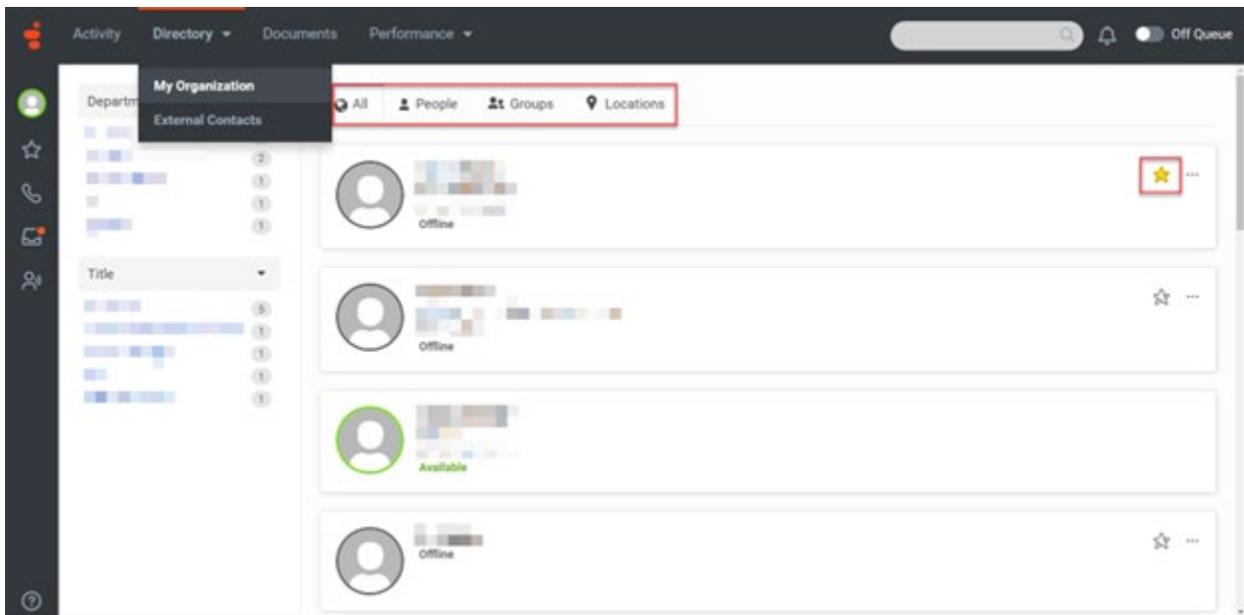
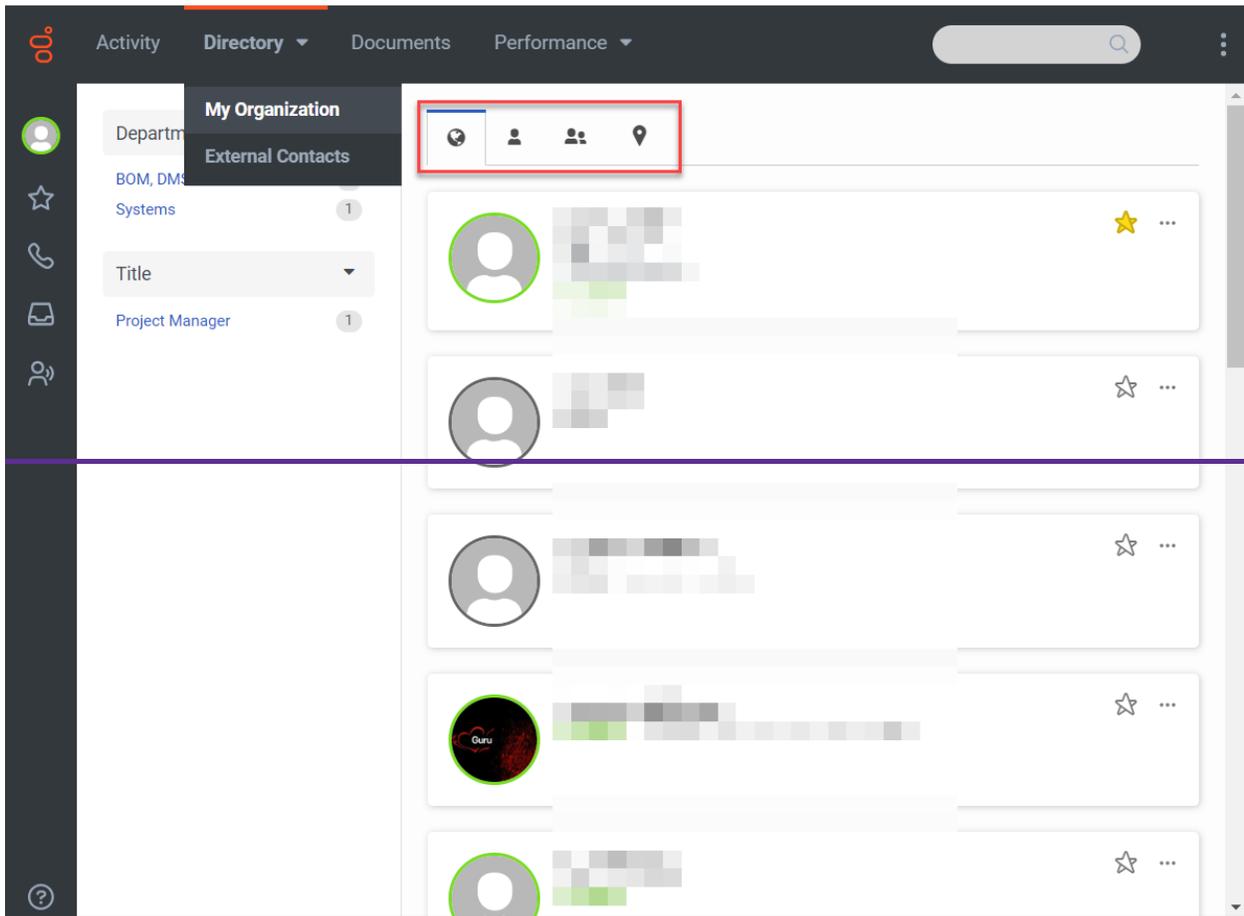
3.1.2 Directory

Click Directory for drop-down options:

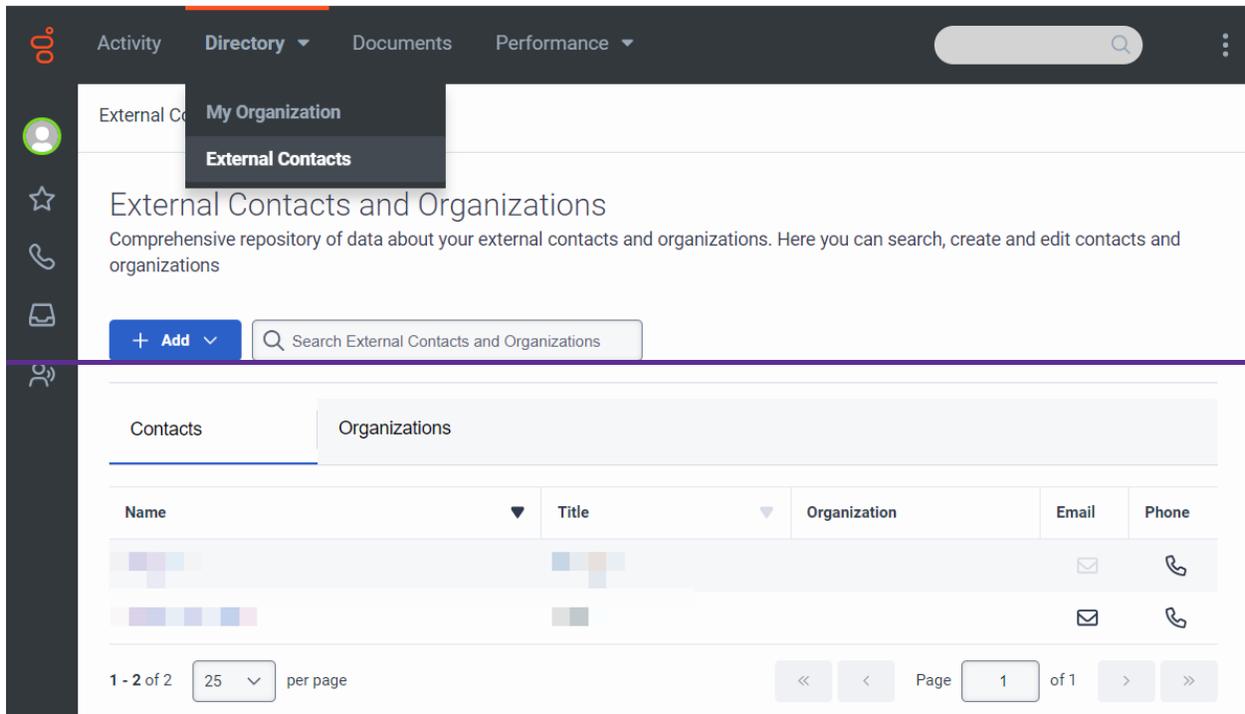
- Select My Organization to display contacts in your line of business.
- Select External Contacts to display contacts from outside your line of business.



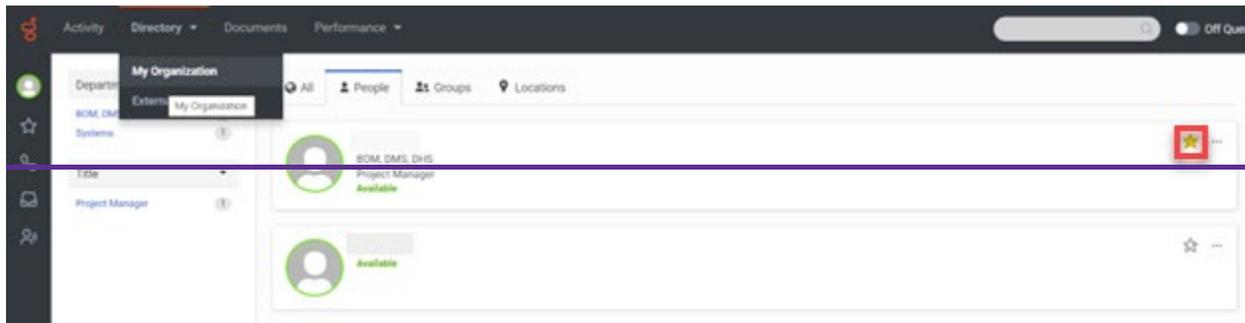
Filter the contacts in My Organization by all ~~contacts~~, people, groups, or locations. [Click the star to the right of an entry to add it to your favorites list.](#)



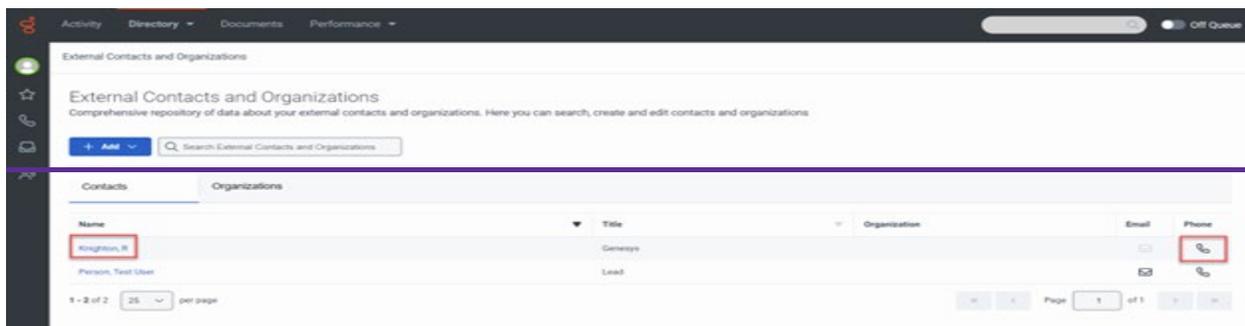
Display ~~external~~external contacts.



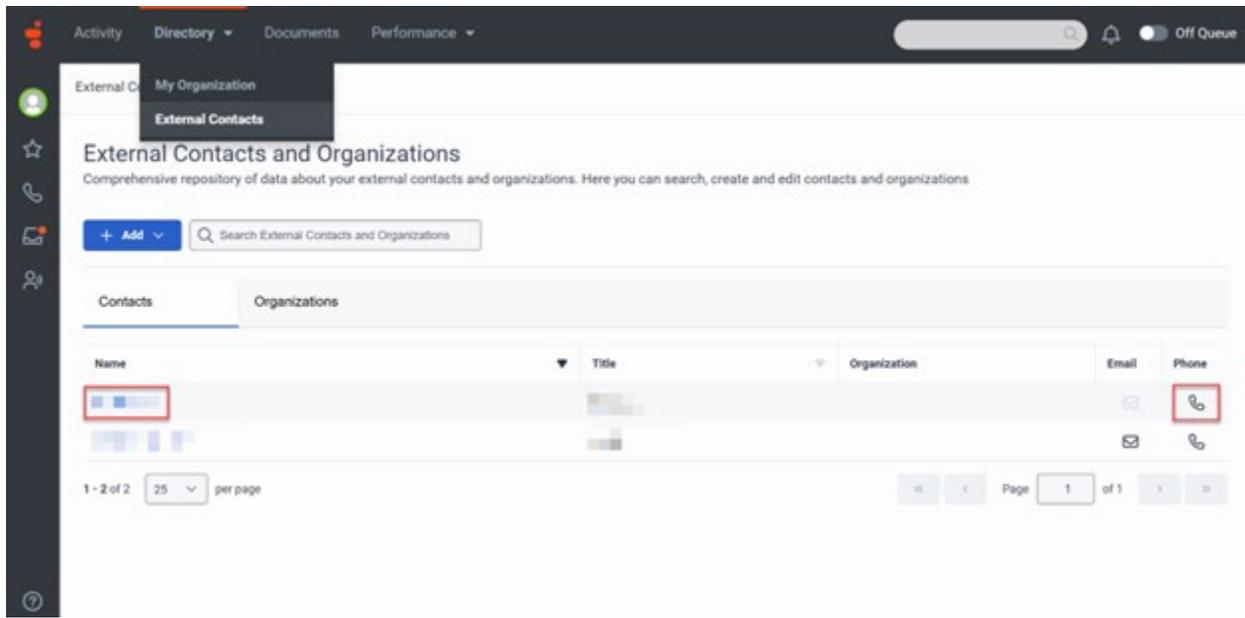
Click the star to the right of an entry to add it to your favorites list.



You can create external contacts for people who do not have Genesys [Cloud](#) IDs. Click the phone button to the right of an external contact to call them. Click their name to view interactions and add notes.



Note [All external contacts created are visible to the entire organization.](#)



3.1.3 Communications Sidebar

Click the profile button in the communications sidebar to access log out, availability status, and preferences. The green Available status means you are not on queue for calls and are available for calls within your business area. While your status is available, you will not receive calls or voicemail from the queue. Your status changes to on queue when you move the On Queue toggle to the right. Ask your supervisor about when to use the Busy, Away, Break, Meal, and other statuses.

Activity Directory Documents Performance

Available 3h 26m 37s

Busy

Away

Break

Meal

Meeting

Training

DHS Genesys
No location available.

Emergency Address
Primary number not found.

What's on your mind?

Out of Office Preferences Logout

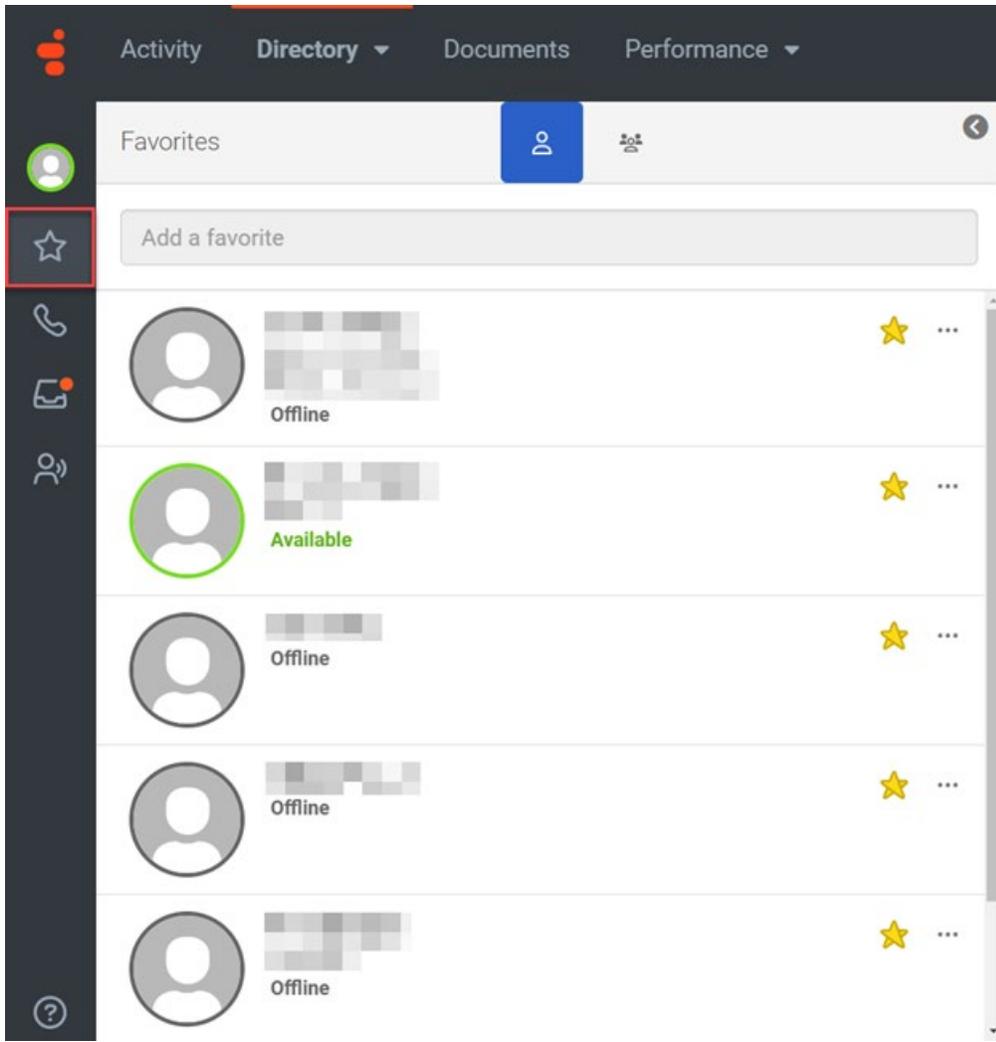
Click the star button to display the contacts and groups you've chosen as favorites.

Favorites

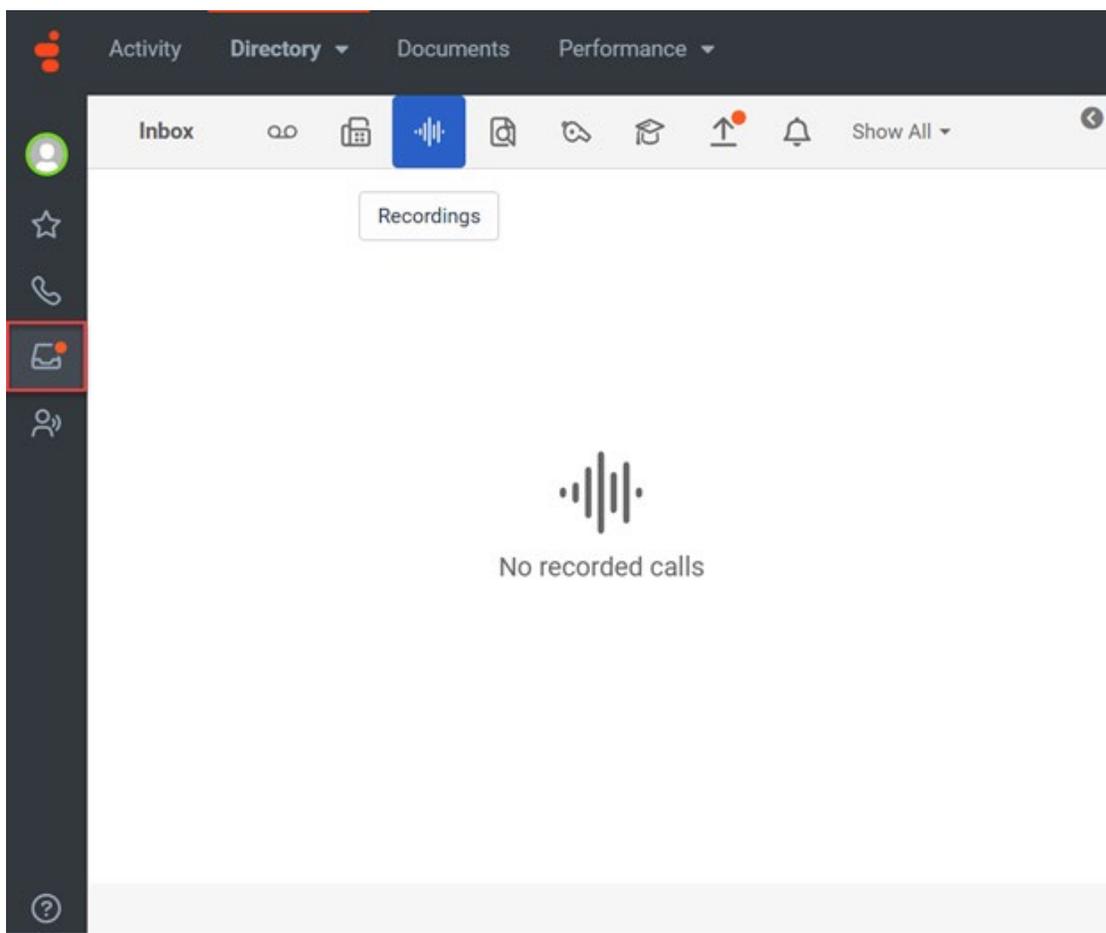
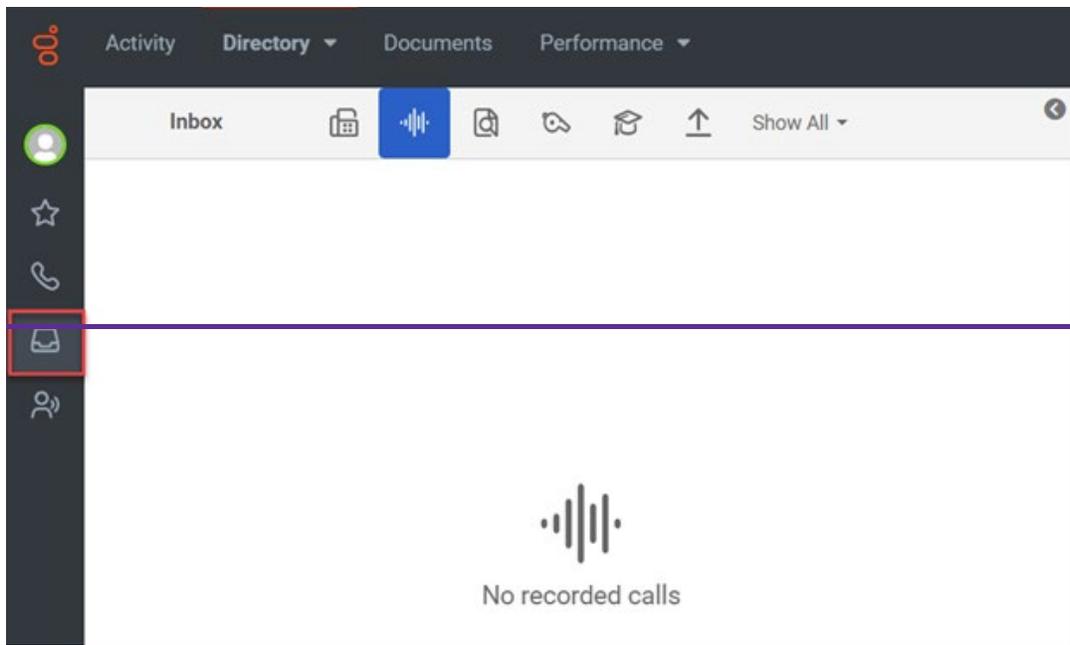
Add a favorite

-  BOM, DMS, DHS
Project Manager
Available
-  Offline
-  Offline
-  Systems
Offline

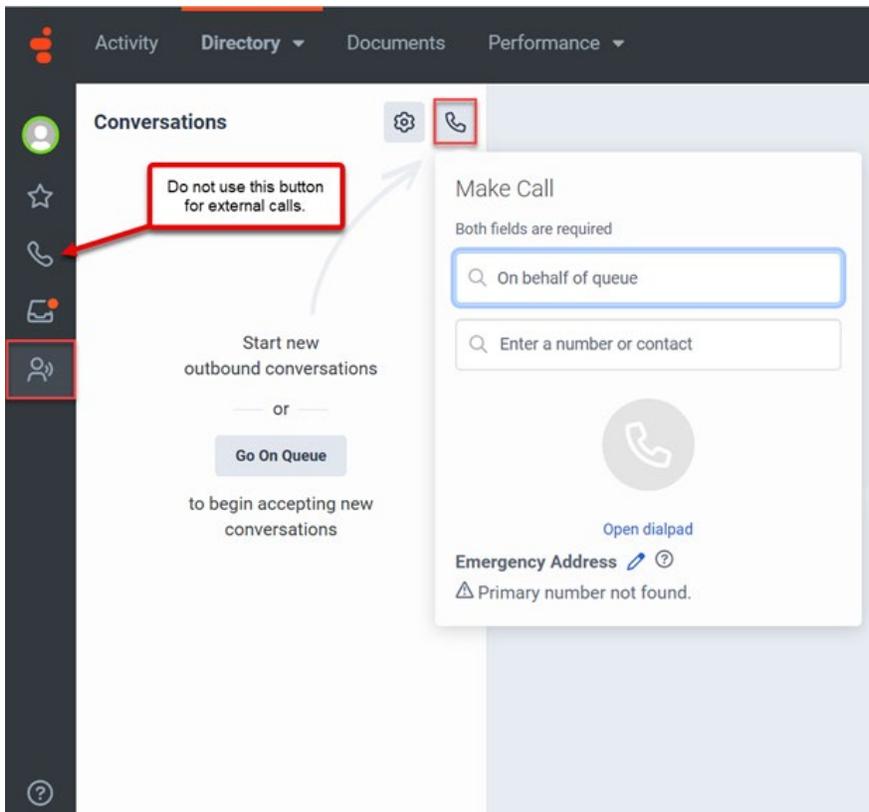
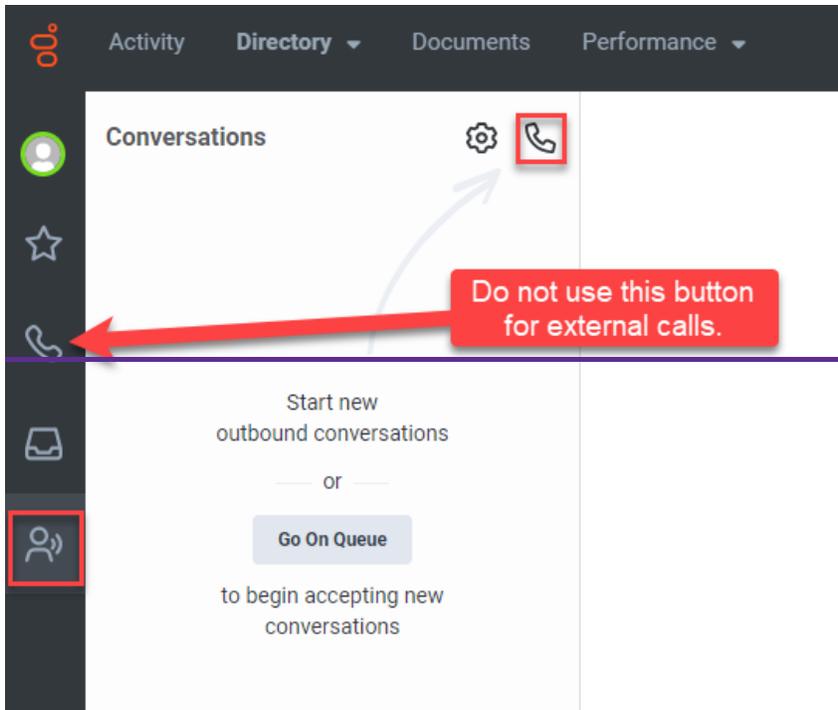
The image shows a mobile application interface for a 'Favorites' list. At the top, there is a header with the title 'Favorites' and two navigation icons: a person icon and a group of people icon. Below the header is a search bar with the placeholder text 'Add a favorite'. A red box highlights a star icon in the left-hand navigation menu. The main content area displays a list of five favorite contacts. Each contact entry includes a circular profile picture, a name, a role or title, and a status indicator. The first contact is 'BOM, DMS, DHS Project Manager' with a status of 'Available'. The second contact is 'Offline'. The third contact is 'Offline'. The fourth contact is 'Systems Offline'. Each contact entry also features a yellow star icon and a three-dot menu icon on the right side. A purple horizontal line is drawn across the screen, passing through the second contact entry.



Click the inbox button to display saved items.



Click the interactions button and then the phone button to make an external call. Do not use the phone button in the communications sidebar to make external calls.



3.2 Performance

3.2.1 My Performance

3.2.2 My Status

3.2.3 My Interactions

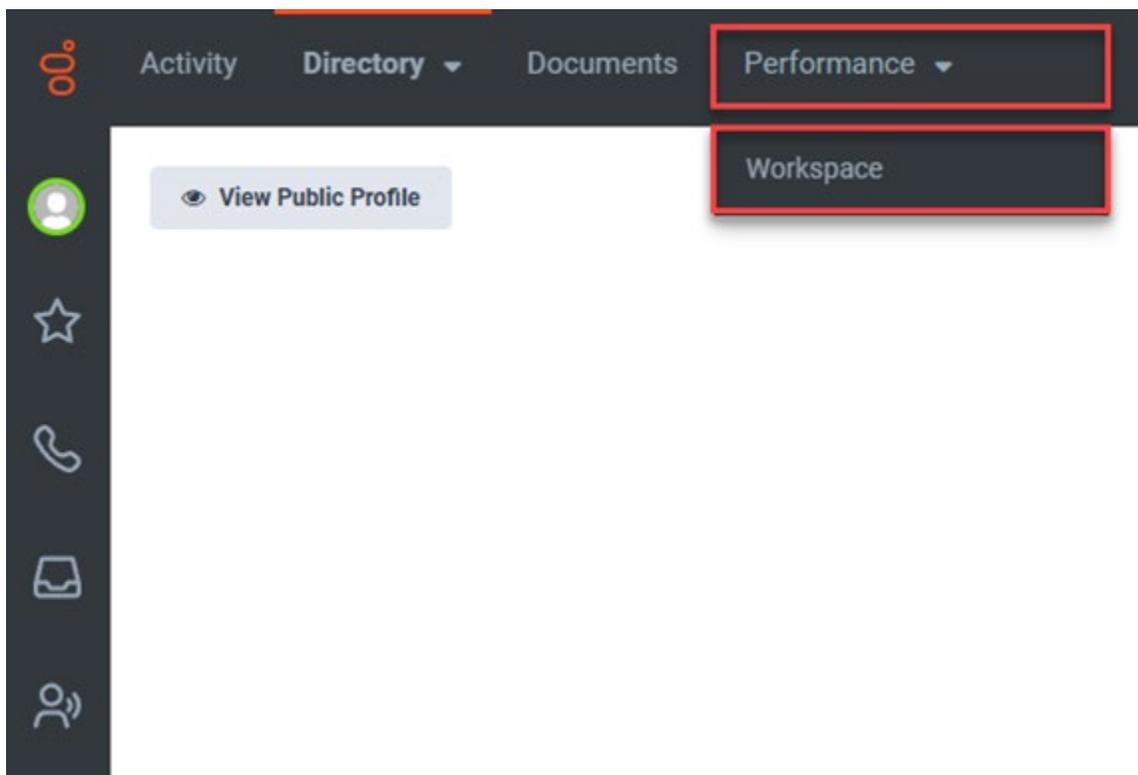
3.2.4 My Queues Activity

[3.2.5 Exporting, Scheduling, and Expiring Reports](#)

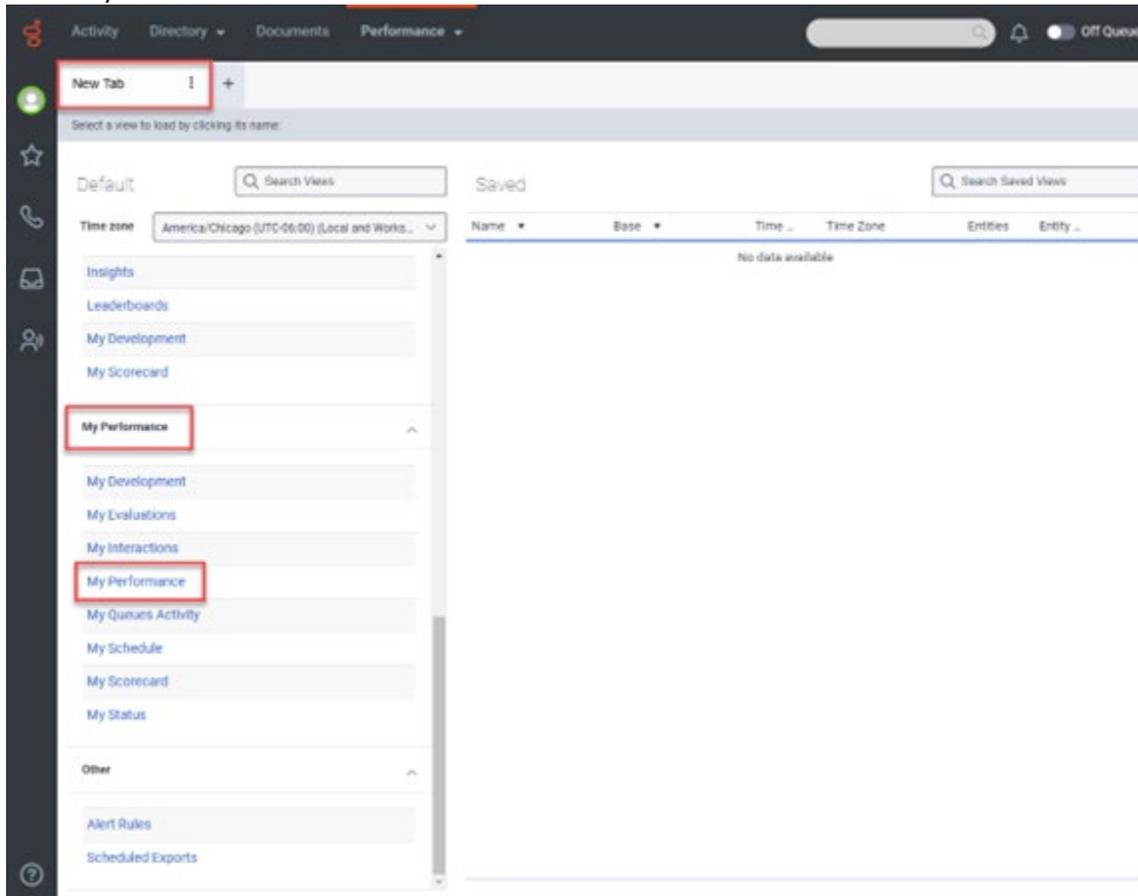
(Video instructions available: [Performance](#))

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.



From the Performance>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, and Interactions.

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

Interval	Answer	Handle	Avg Handle	Avg Talk	Avg Hold	Avg ACDW	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 or multiple tabs. Scroll down and click the desired hyperlinks in the left pane to view specific performance information.

Default Saved

Time zone: America/Chicago (UTC-06:00) (Local and Works...)

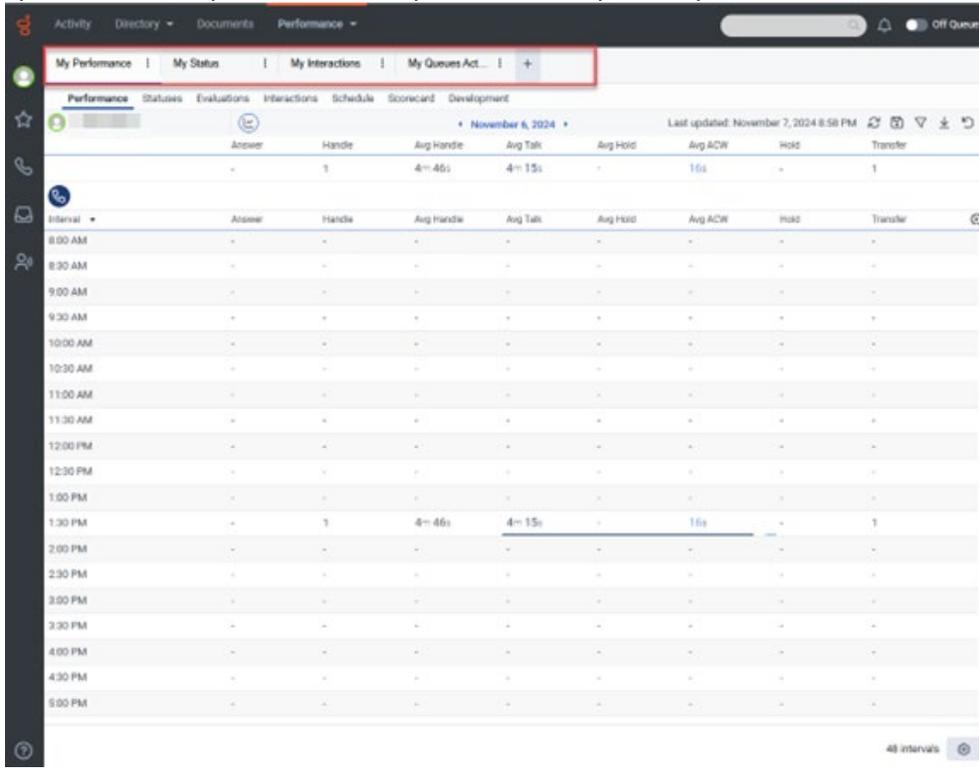
My Performance

- My Development
- My Evaluations
- My Interactions**
- My Performance
- My Queues Activity**
- My Schedule
- My Scorecard
- My Status**

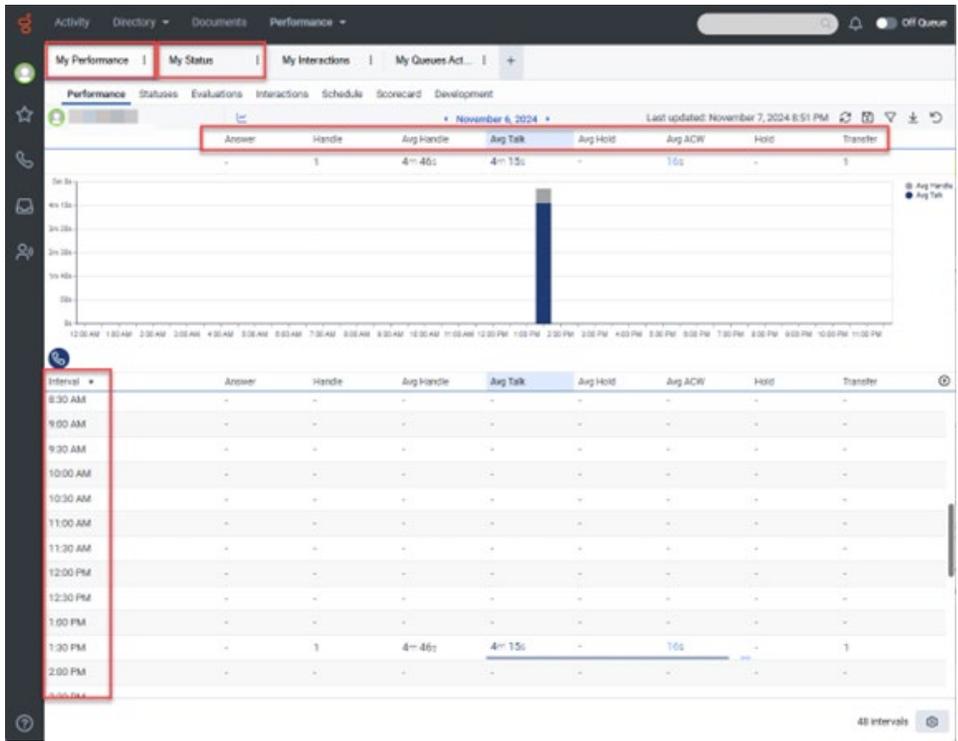
Other

- Alert Rules
- 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.



On the My Performance (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 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.

PRESETS

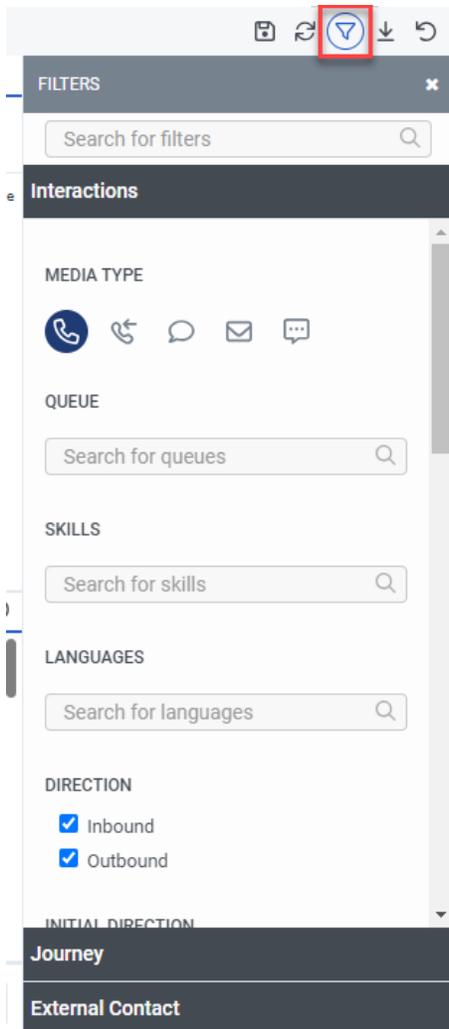
- Today
- Yesterday
- This week
- Last week
- Previous 7 days
- This month
- This month by week
- Last month
- Previous 30 days
- Previous 3 months

Time zone: America/Chicago (U...)

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.

My Performance

Performance Statuses Evaluations Interactions Schedule Development

April 2024

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	-	-	-	-	-	-	-	-

TABLE COLUMNS

PERFORMANCE

- ACW
- Alert
- Alert - No Answer
- Answer
- Avg ACW Handled
- Avg Contacting
- Avg Dialing
- Avg Handle
- Avg Hold Handled
- Avg Monitor
- Avg Talk
- Avg Hold
- Avg ACW
- Blind Transfer
- Blind Transfer %
- Consult Transfer

Click the save button to save your desired view.

Save view

Save View As Overwrite Existing View

View Name

Enter view name

Default time period

None

Save Cancel

3.2.5 Exporting, Scheduling, and Expiring Reports

For instructions on exporting, scheduling, and expiring reports see [Section 6.1.7 Exporting or Scheduling a Report](#) and [Section 6.1.8 Expiring Reports](#).

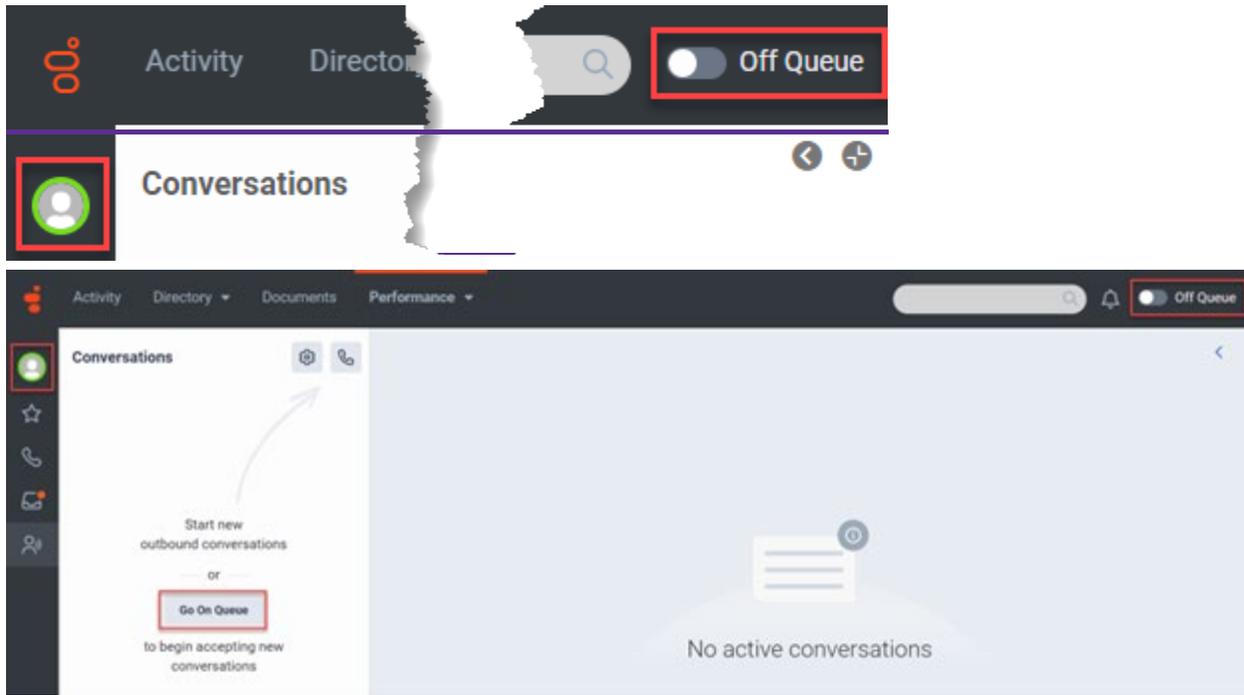
4.1.1 Go On Queue

4.1.1.1 Notification of Call

4.1.1.2 Ending a Call

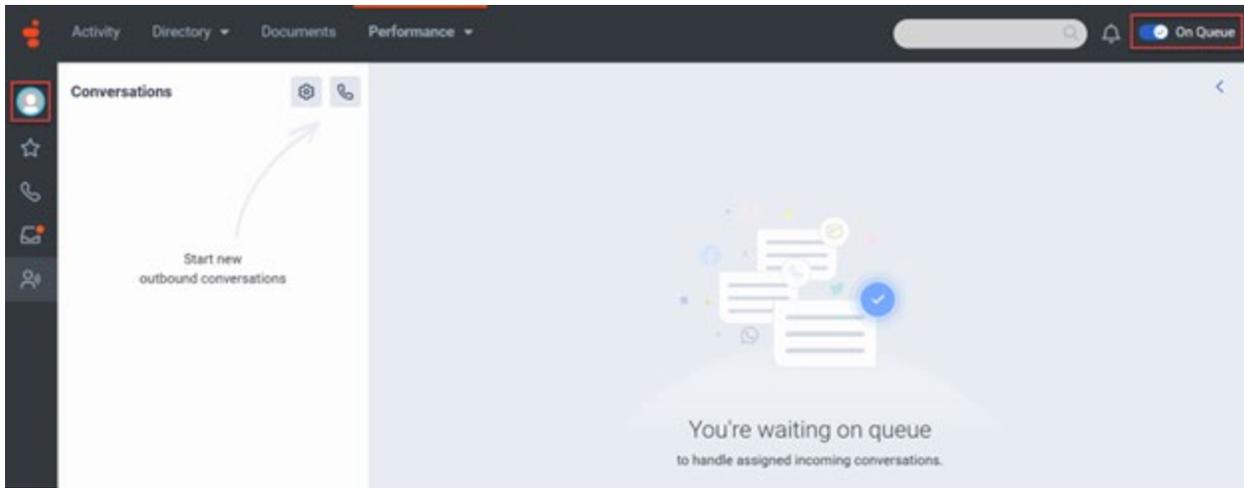
To receive calls, you must be on queue. If not on queue, click the toggle in the top right corner [or click the Go On Queue button on the left side in the Conversations pane.](#)

Off queue:



On queue:

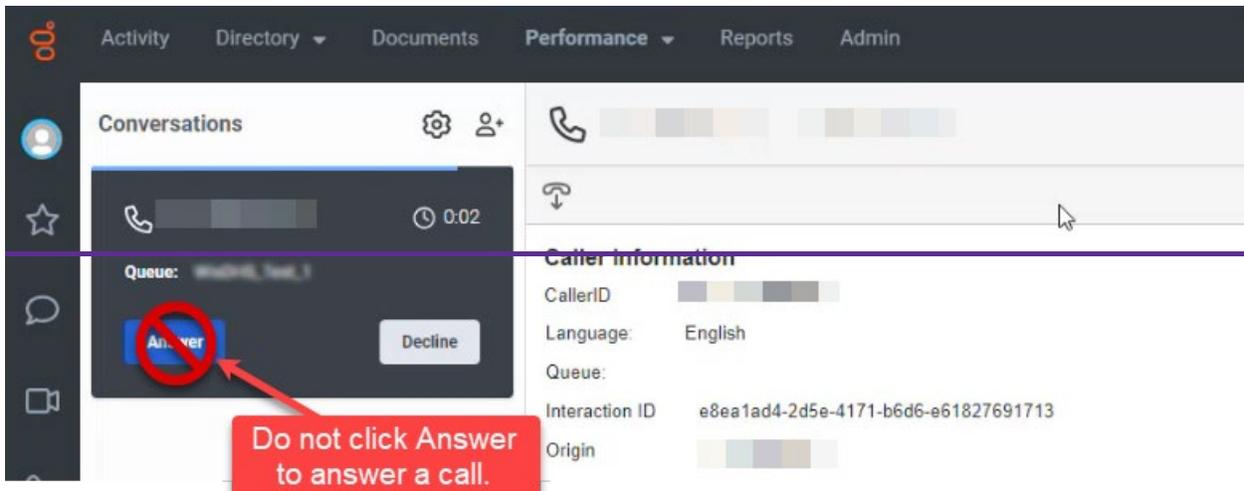




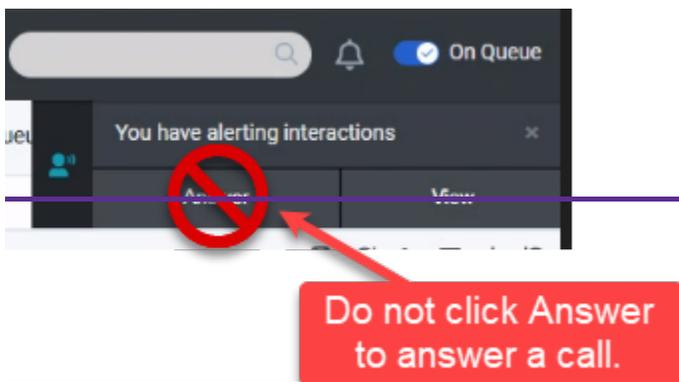
4.1.1.1 Notification of Call

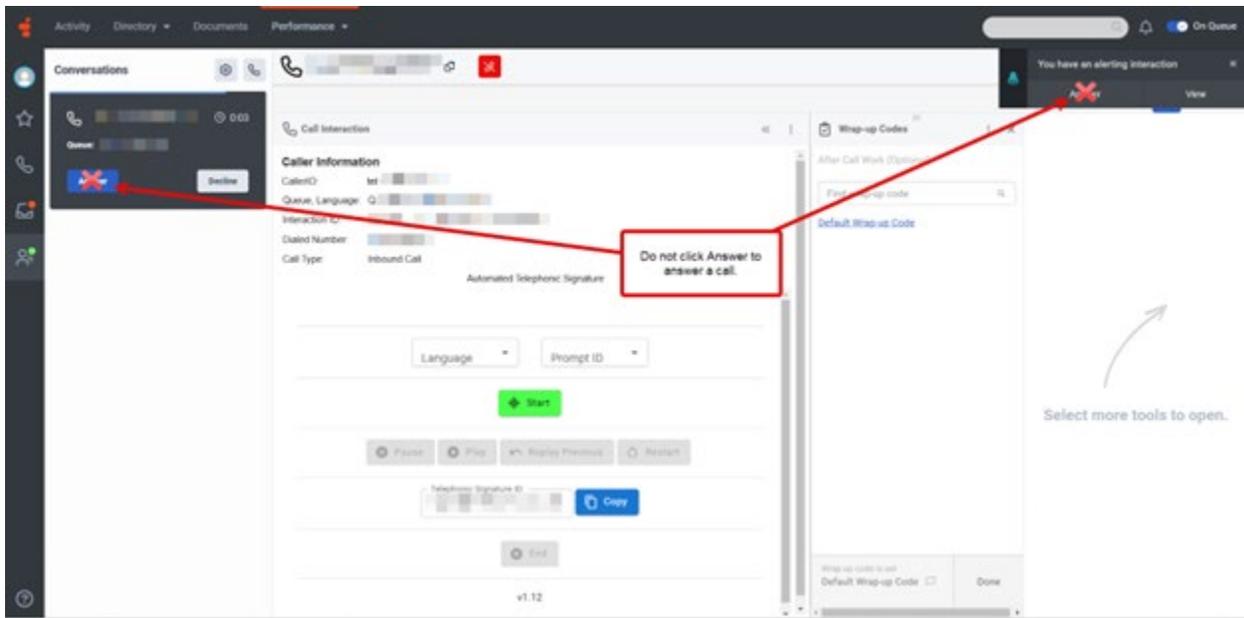
Incoming call notifications display at the top of the content viewer. If the interactions pane is open, the display is on the left side of the content viewer and includes information about the call including CallerID, queue, and interaction ID.

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

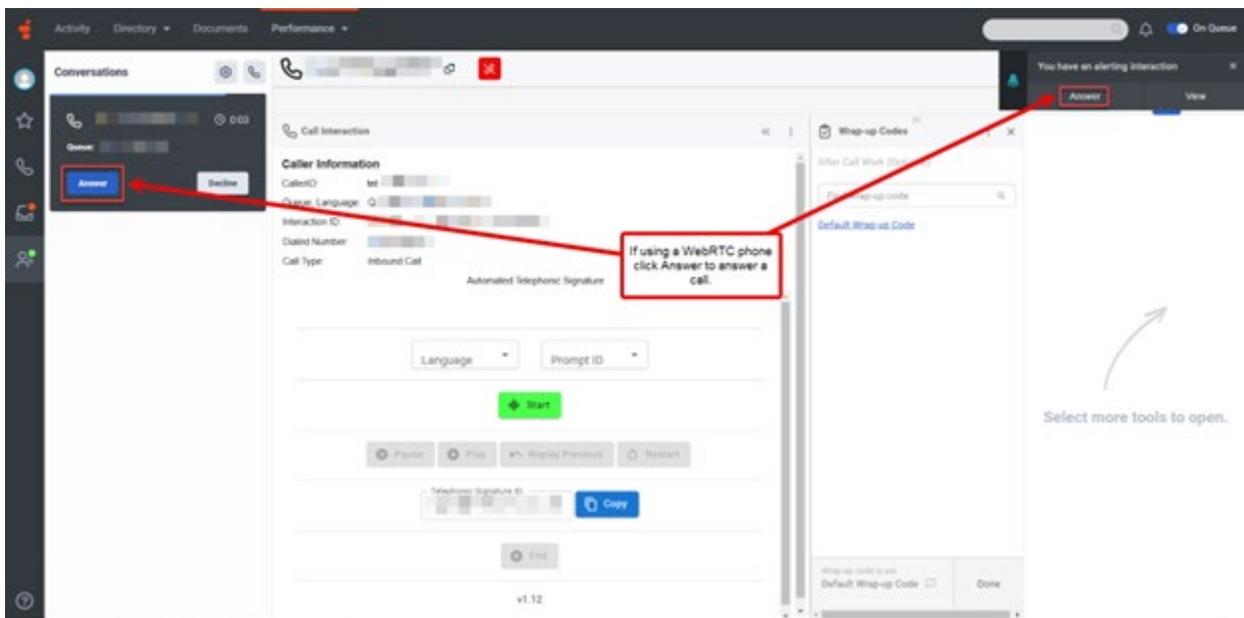


If the notification pane is not open, the call notification displays in the top right corner of the content viewer.



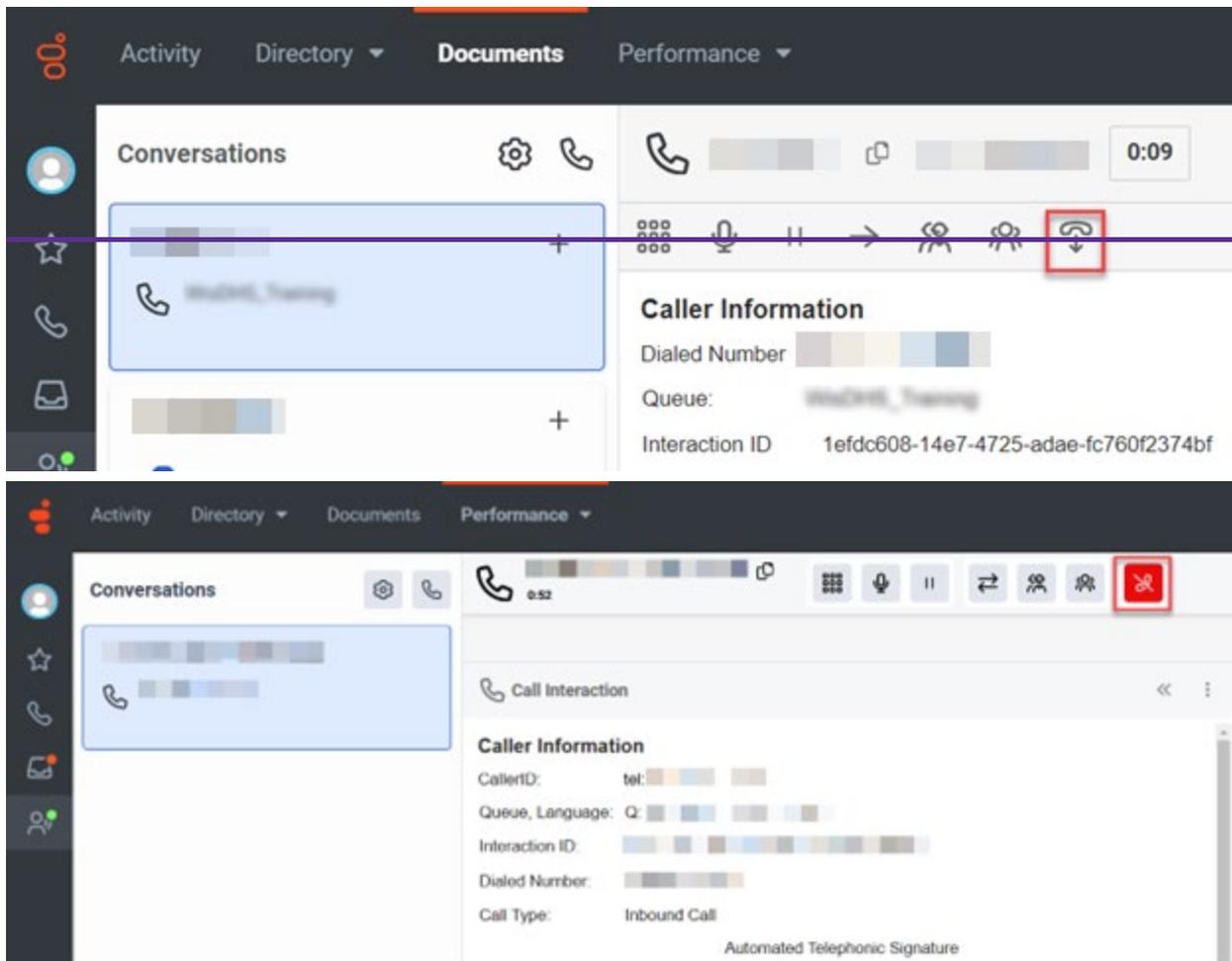


If using a WebRTC phone click Answer in the conversations pane or on the popup notification.

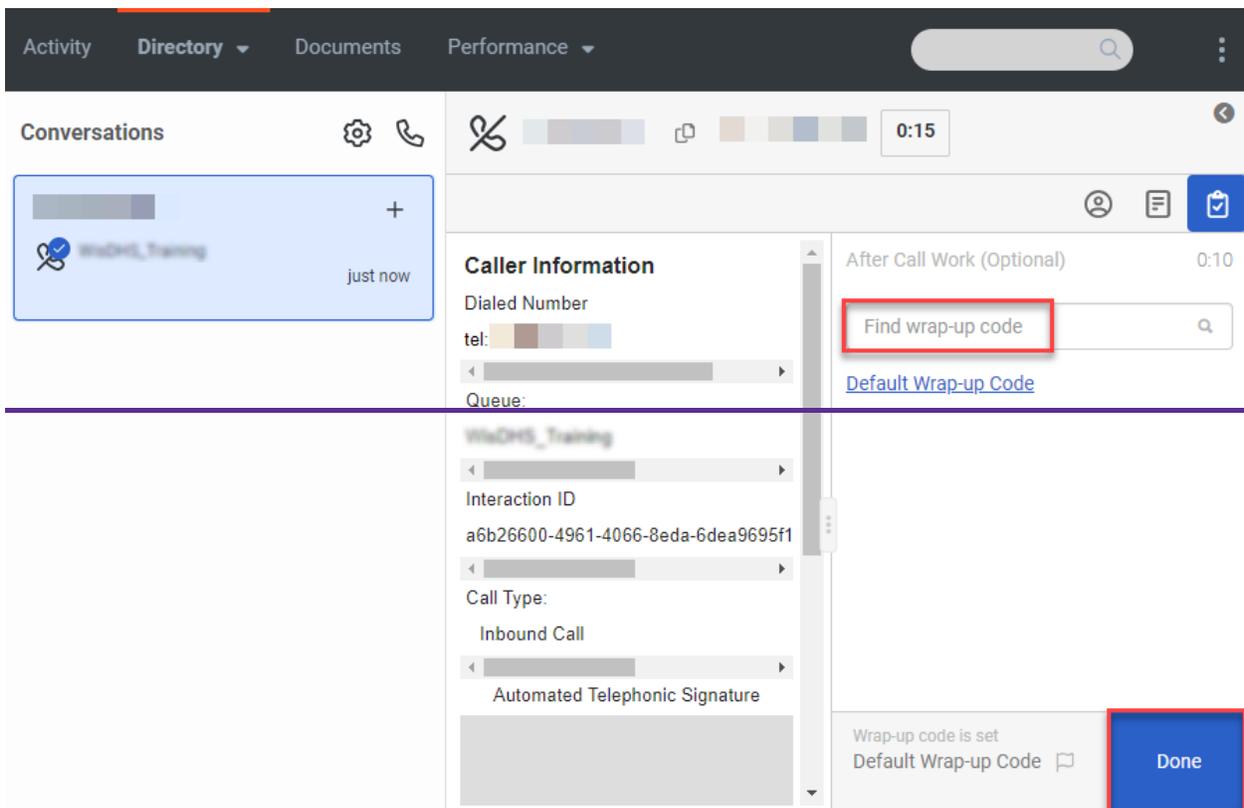
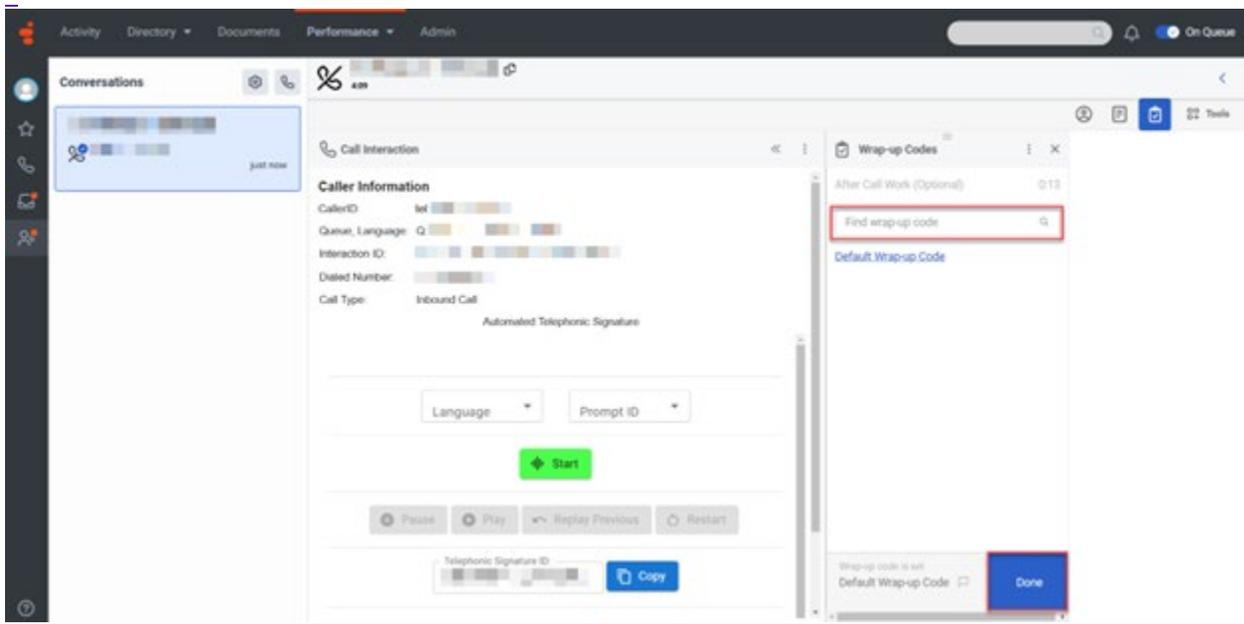


4.1.1.2 Ending a Call

Click the end call button to end the call. Ending a call looks the same if using a WebRTC phone.

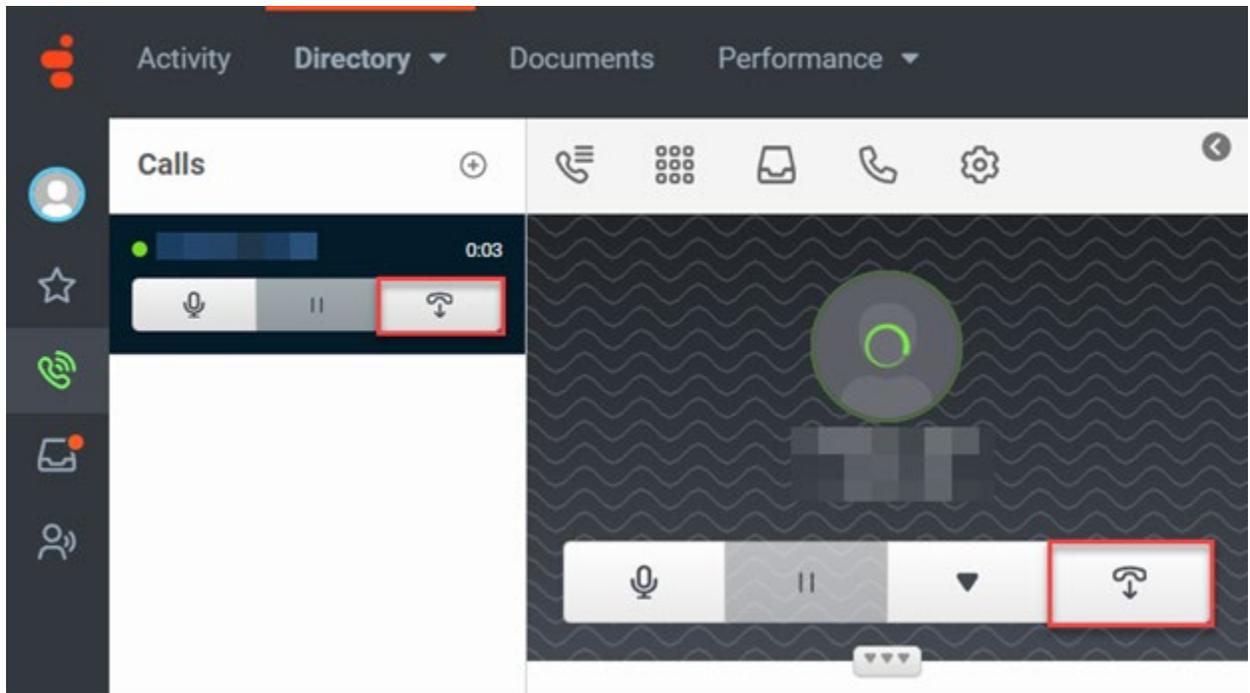


The after call activities timer starts when the call ends. Note that users may need to enter a wrap-up code after they end a call if their IM agency requires it. After completing any after call work, click Done in the bottom right corner of the desktop to stop the after call timer and return to on queue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



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

[To end a call for an internal call, click the end call button.](#)



4.1.2 Agent Training Call Flow

[4.1.2.1 Receiving a Practice Call From the Queue](#)

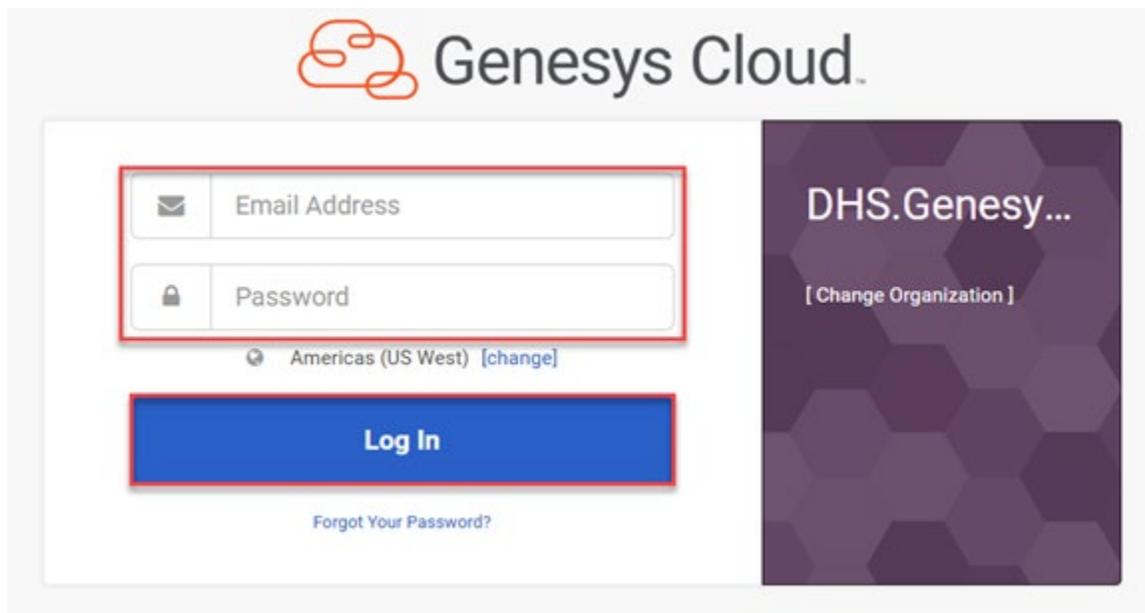
The agent training call flow is a way for the agent to practice receiving calls from the queue and to familiarize themselves with Genesys Cloud before receiving live calls. Agents can use the training call to practice using the different features in Genesys such as receiving and transferring a call, 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](#))

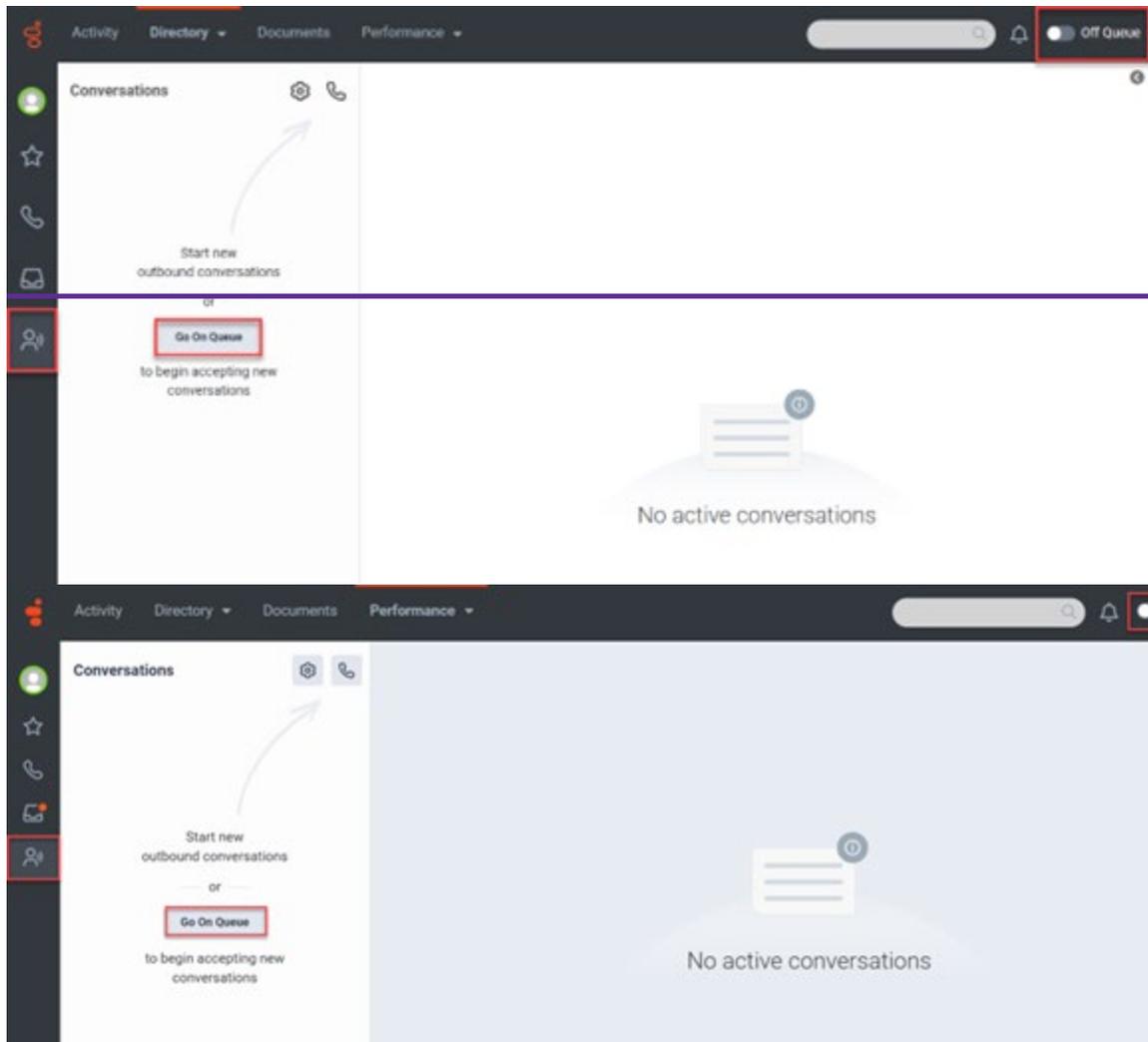
Each agent is given a five-digit training ID number received from their supervisor, Administrator, or the Genesys Cloud team. The five-digit training ID is required to receive calls from the training queue.

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



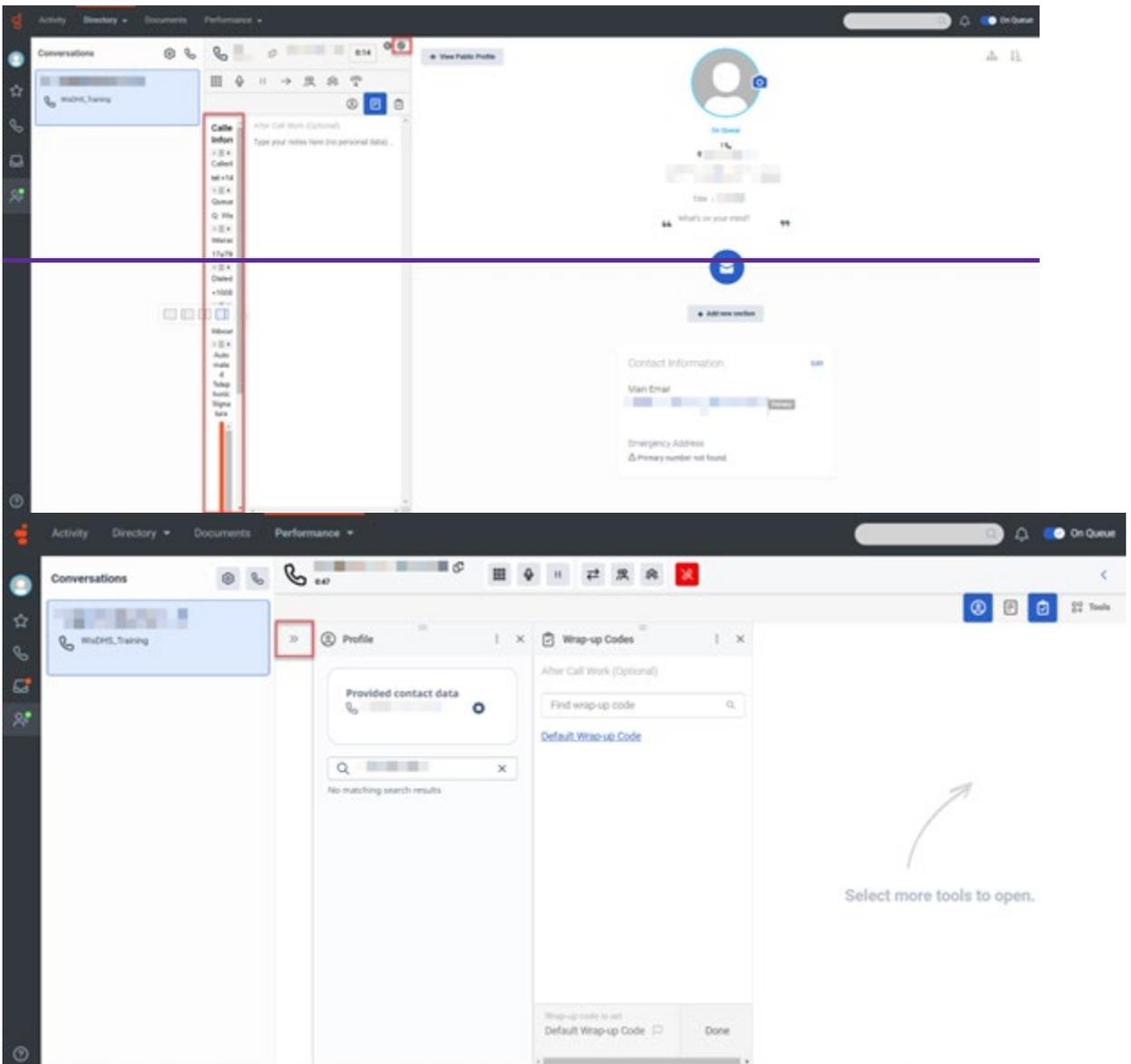
2. Click the [GO-Go](#) On Queue button from the Interactions tab or click the Off Queue toggle button to On Queue in the main menu. By default, your status is set to Available (Off Queue) when you first log in.

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

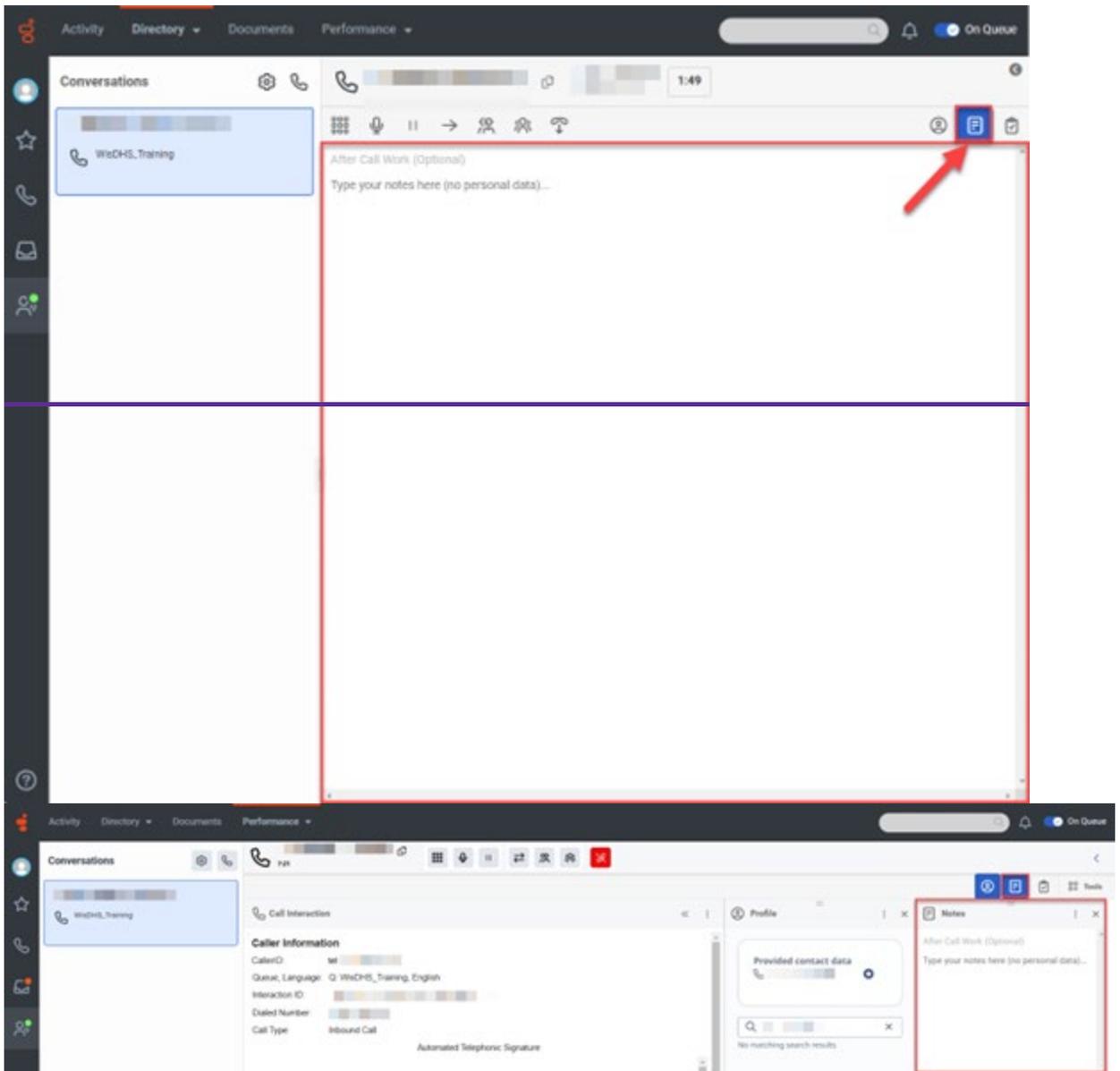


3. Dial 608-893-6918 from a phone other than your agent phone.
4. Enter your training ID when prompted.
5. You should receive a call appearing to come from the queue.
6. Do not click the Answer button in Genesys Cloud. Answer your phone. When the call comes in your screen may have different views. [If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

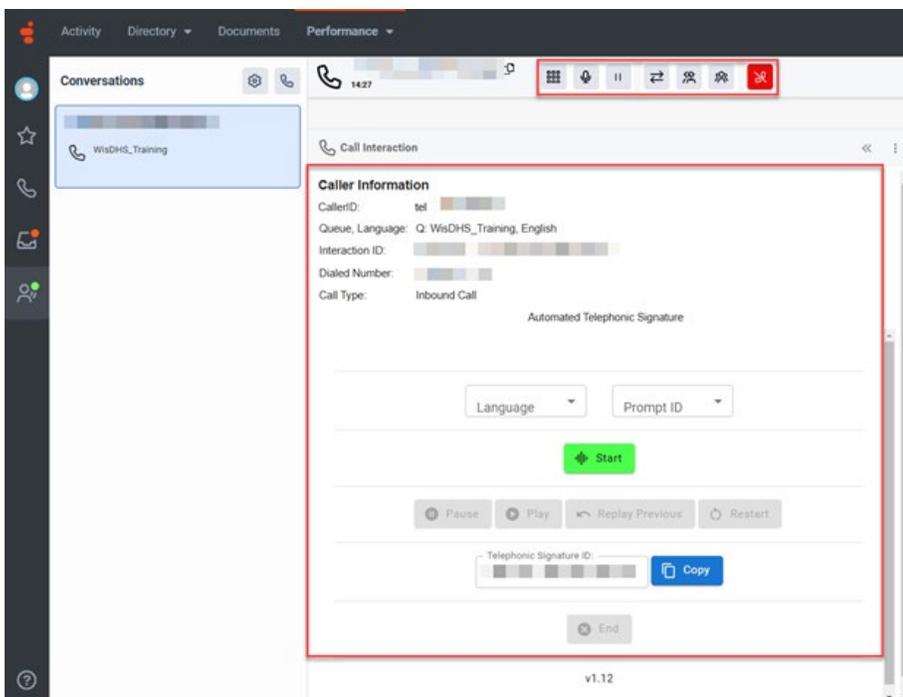
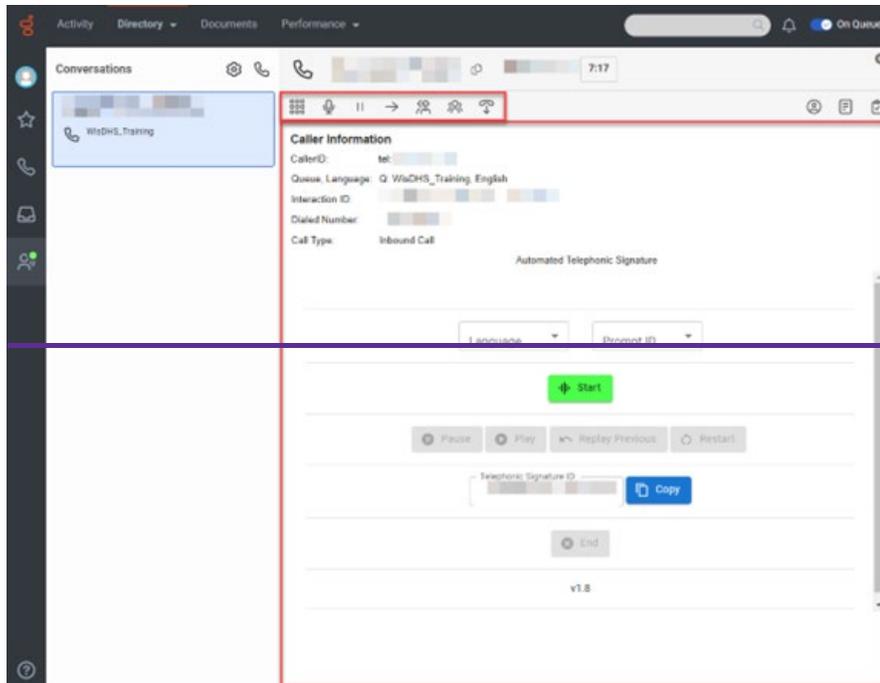
Click on the Expand button if the Caller Information section is collapsed.



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

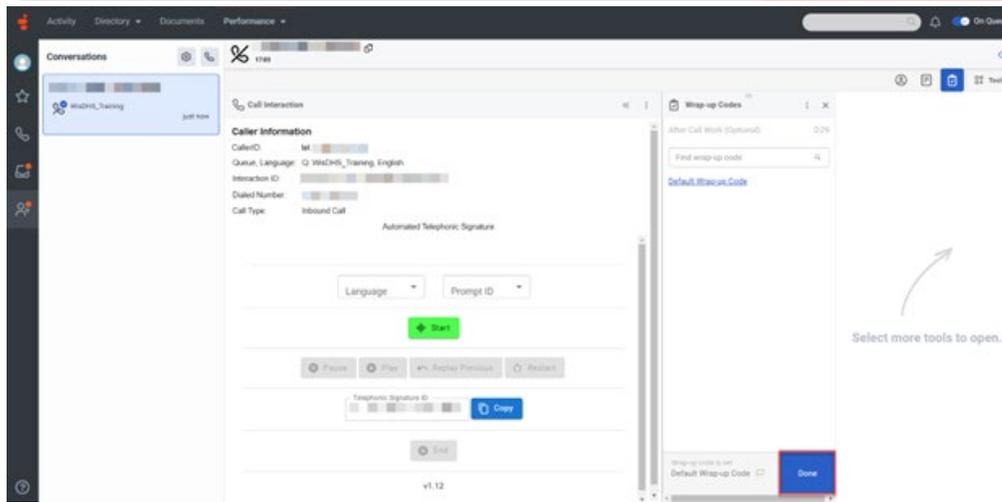
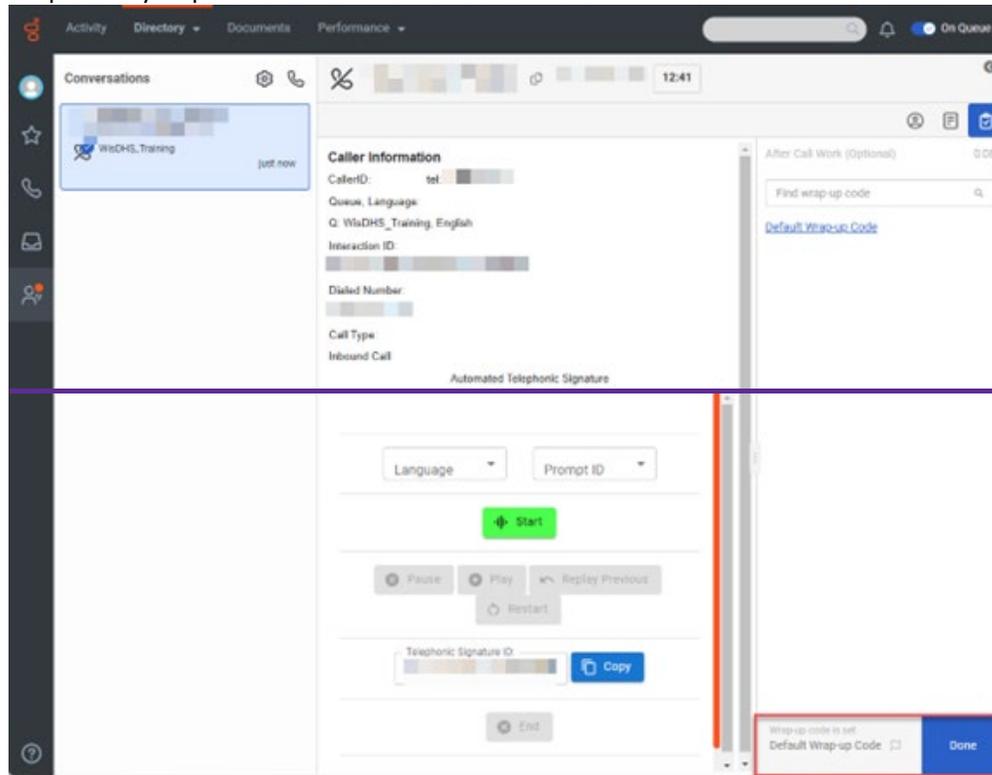


7. While on the call, notice the Caller Information section and practice the functionality within the call handling ribbon.

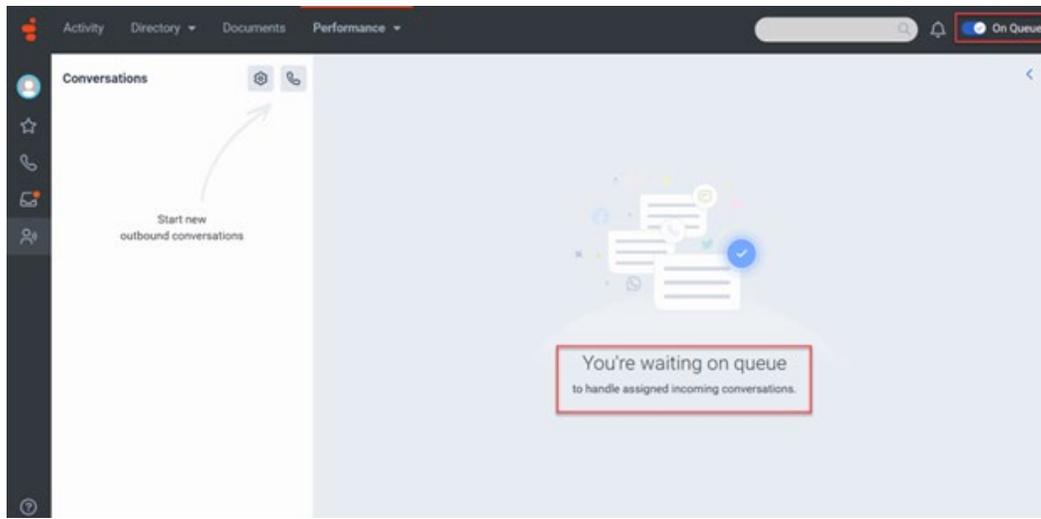
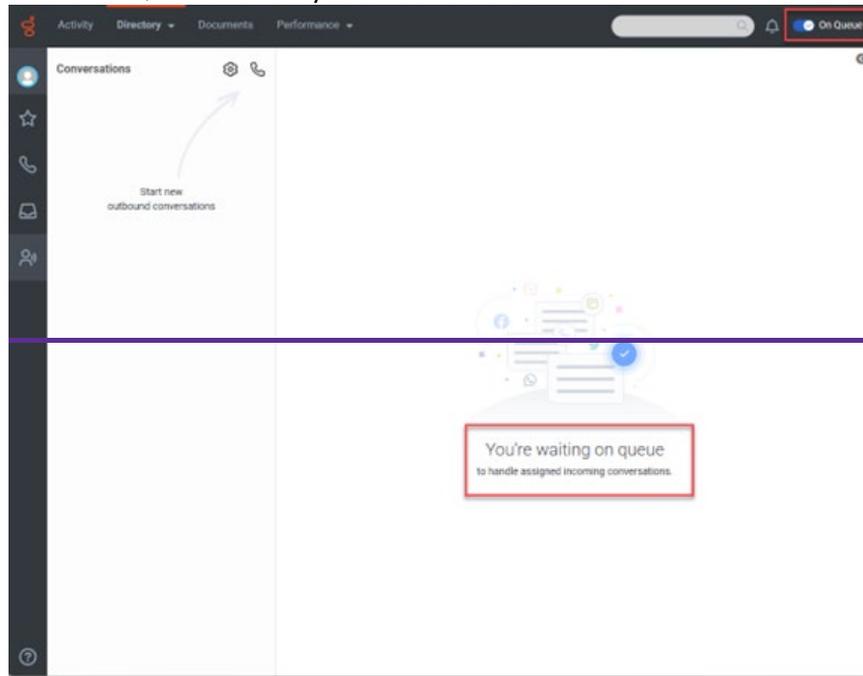


8. Once you are comfortable using the features, click on the end call button or hang up the call.

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



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



4.2 Making an Internal Call (Genesys User to Genesys User)-~~Call~~

4.2.1 Ending an Internal Call

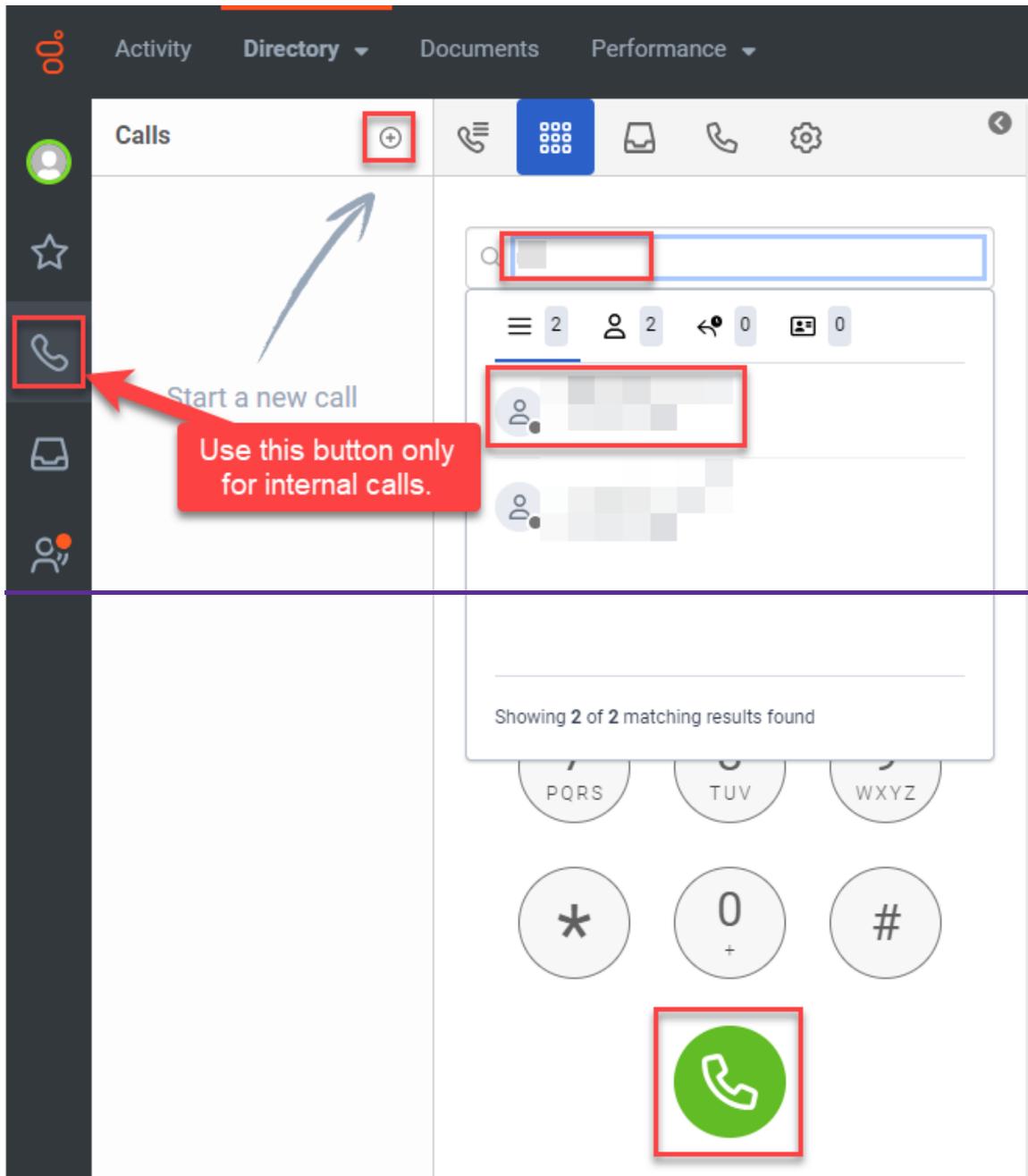
(Video instructions available: [Making an Internal Call](#))

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

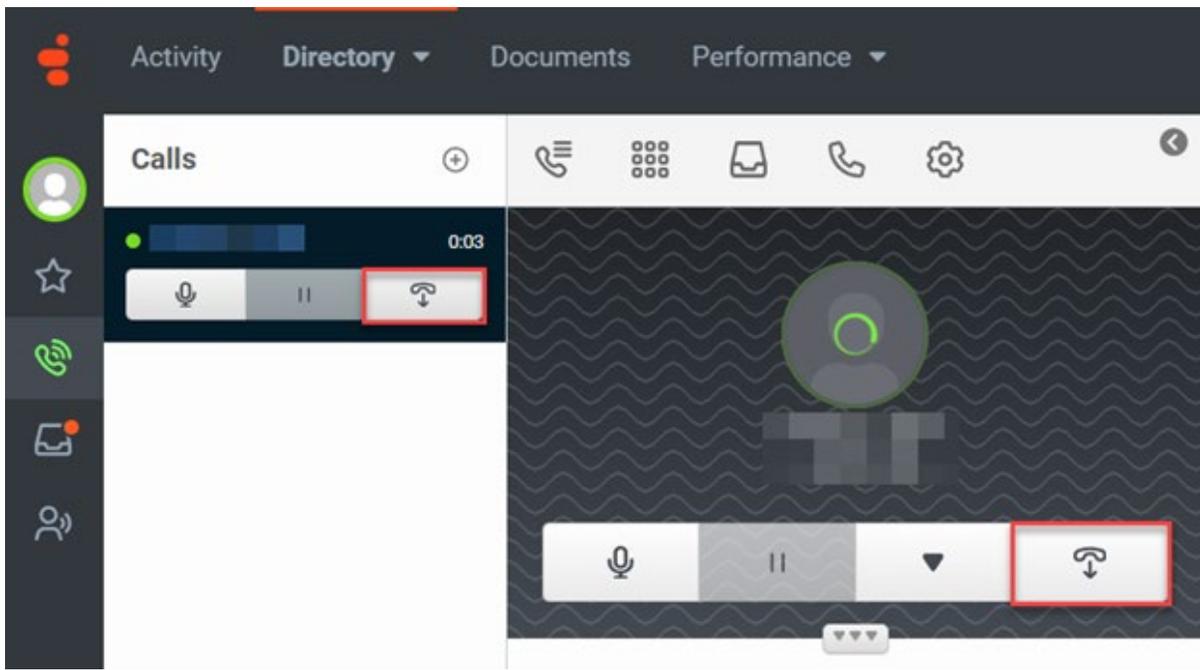
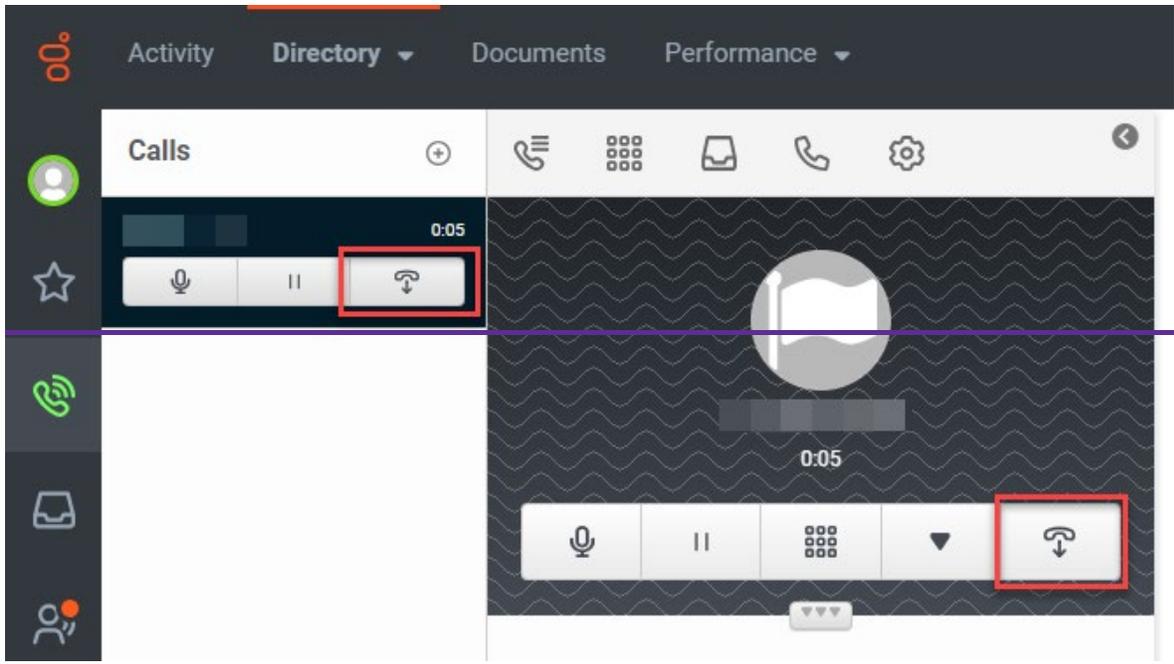
Genesys users can call other Genesys users on an internal call.

To call another Genesys user:

1. Click the phone button in the communications sidebar.
2. If you are currently on queue, click the On Queue toggle button to go off queue.
- 2-3. Click either the plus or dialpad button.
- 3-4. Type the user's name and select it from the list.
- 4-5. Click the green call button to make the call ~~and go off queue.~~



6. [If using an external phone line, answer your ringing external phone.](#)



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.

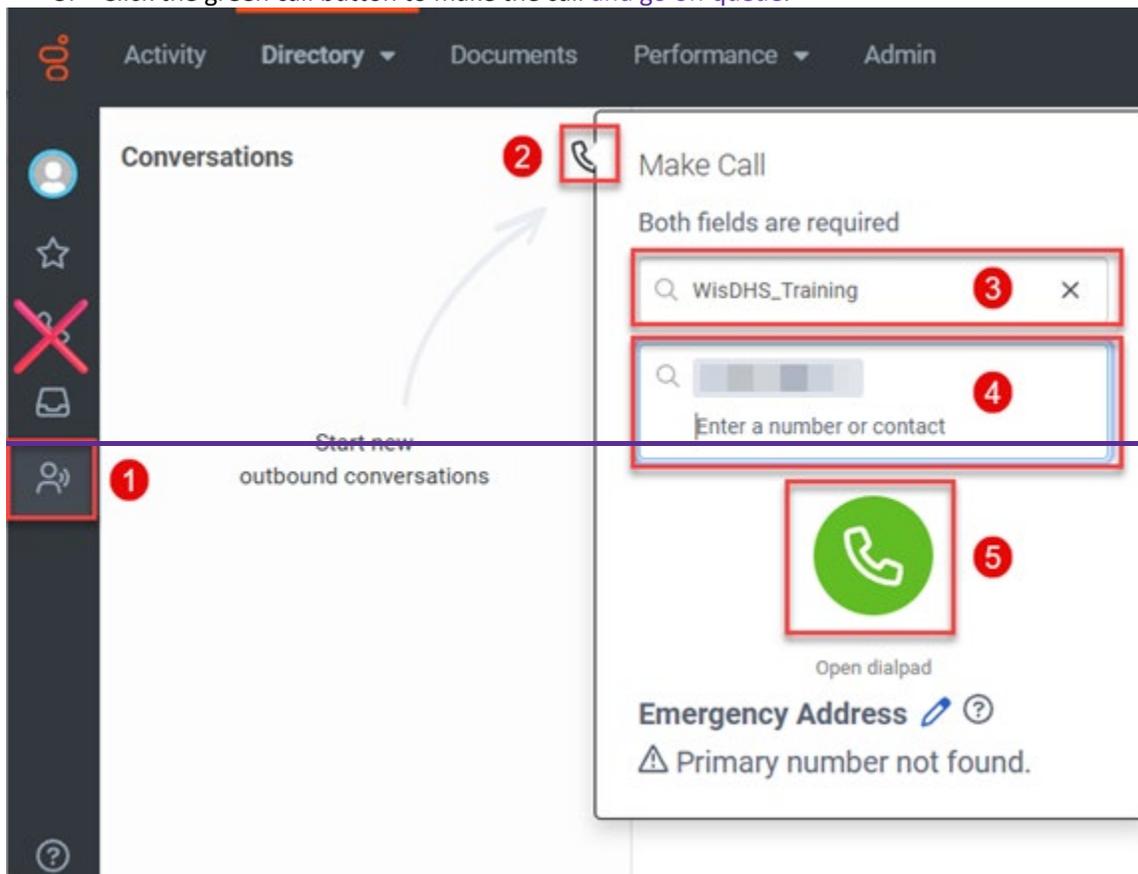
To make an external call:

1. Click the interactions button in the communications sidebar. [If you are currently on queue, click the On Queue toggle button to go off queue.](#)
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

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

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



6. [If using an external phone line, answer your ringing external phone.](#)

Activity Directory Documents Performance

Conversations

Start new outbound conversations

Make Call

Both fields are required

WisDHS_Training

Enter a number or contact

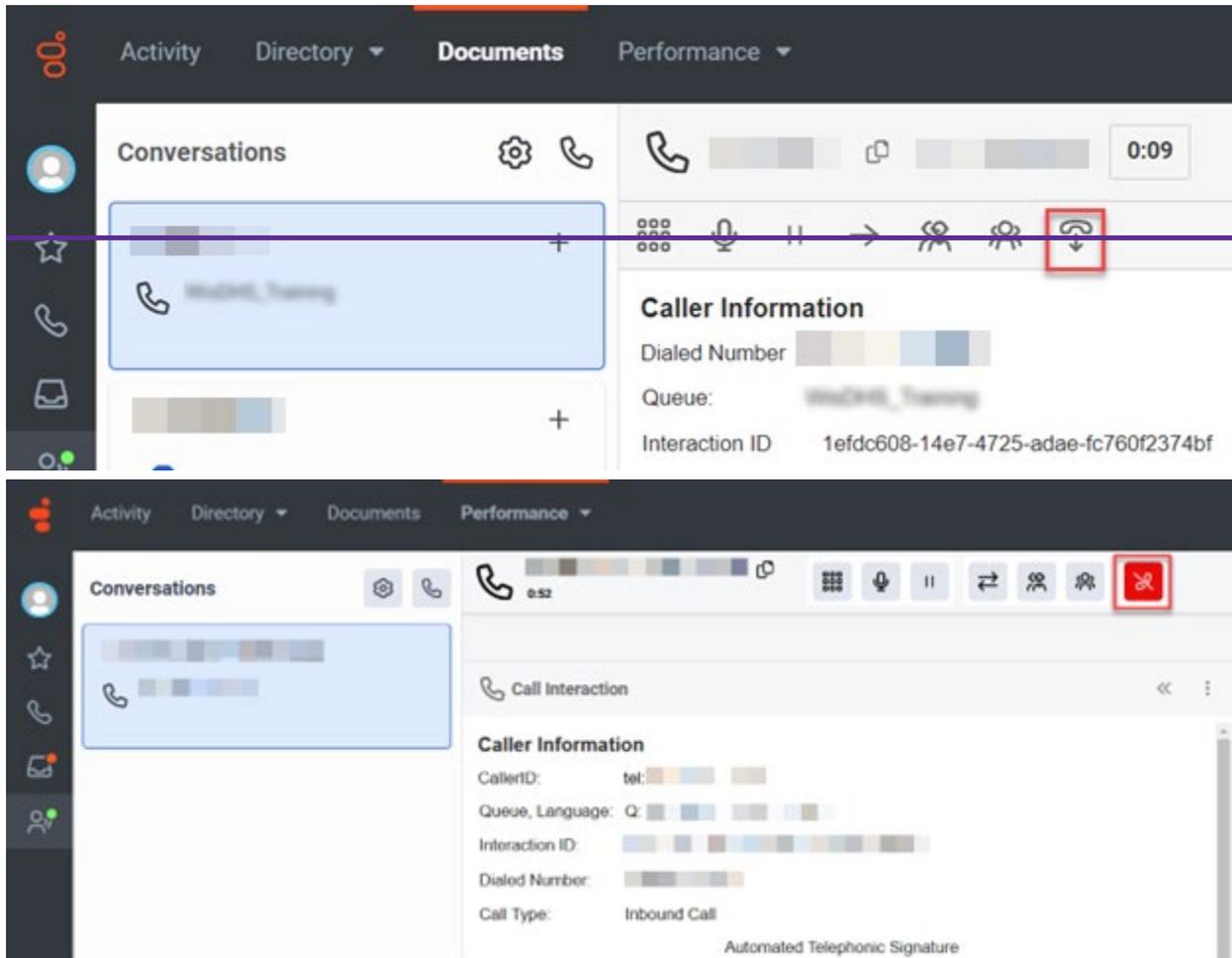
Open dialpad

Emergency Address

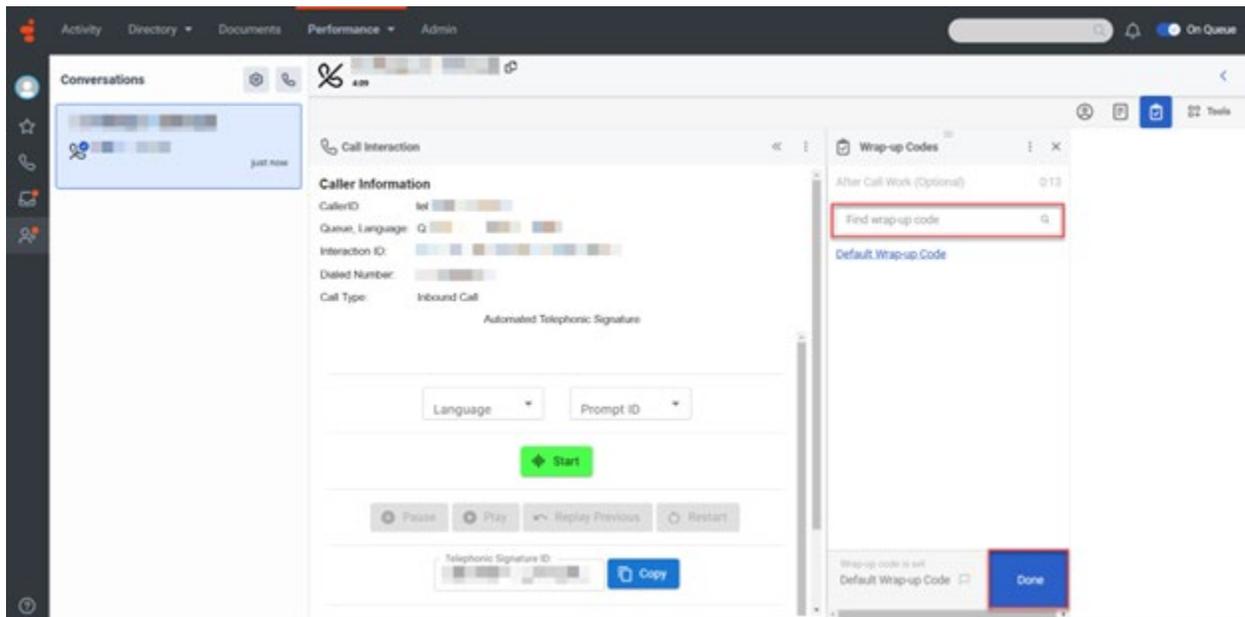
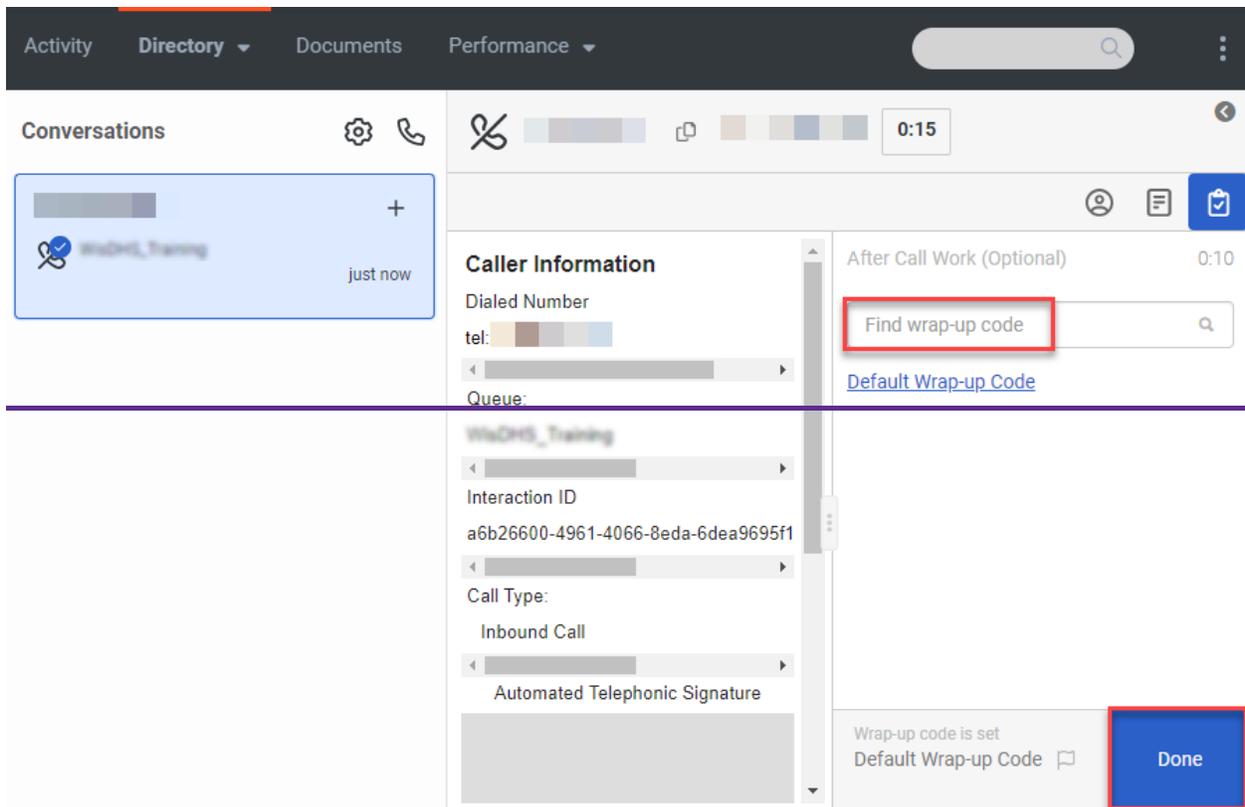
Primary number not found.

4.3.1 Ending a Call

Click the end call button to end the call. [Ending a call looks the same if using a Web RTC phone.](#)



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.



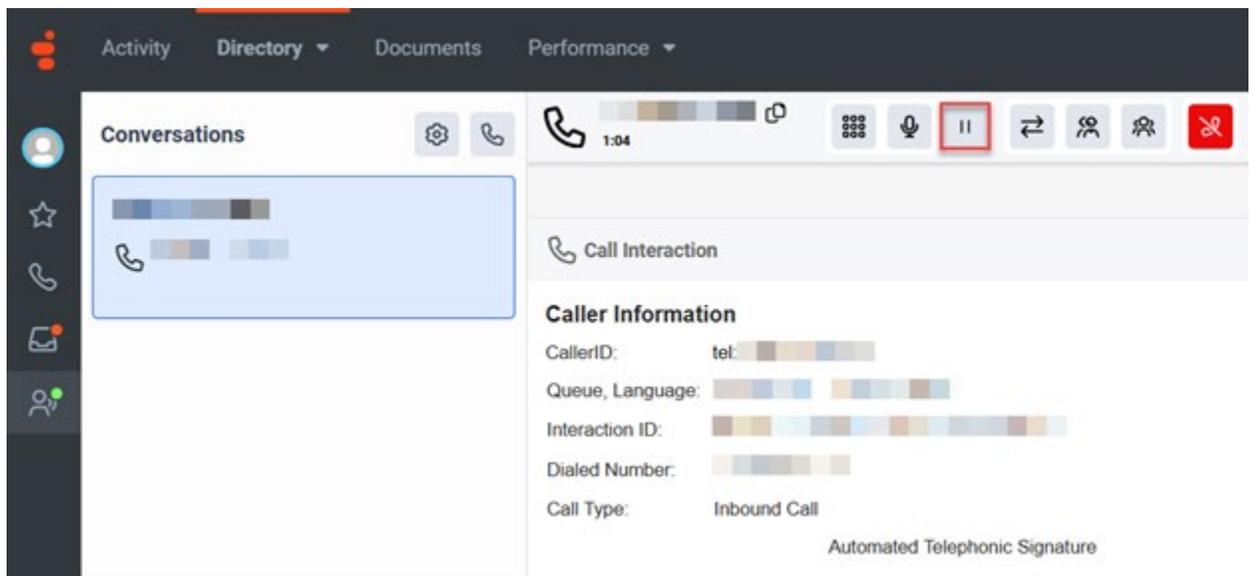
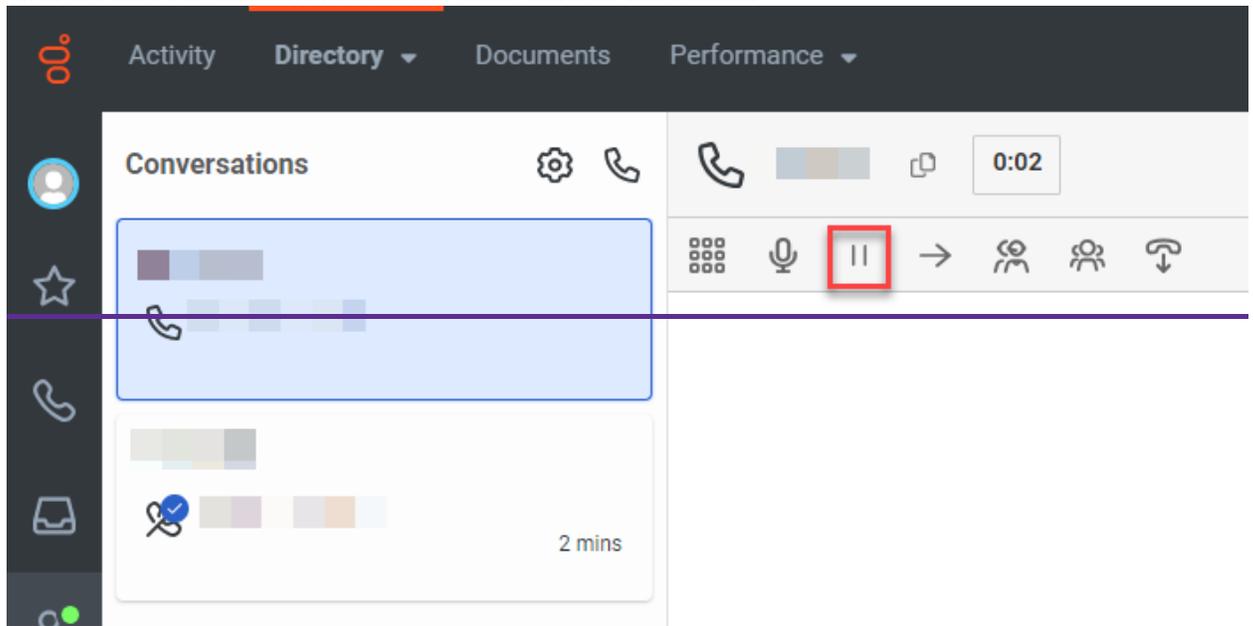
Note If you do not click Done following a call or listening to a voicemail, the after call timer continues to run.

4.4 Placing a Call on Hold

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

To place a call on hold:

1. Click the hold button in the ribbon. The caller will hear hold music.



2. Click the hold button again to resume the call.

4.5 Transferring a Call

4.5.1 Transferring a Call to an XFERS Genesys Queue

4.5.2 Transferring a Call to a Genesys Agent

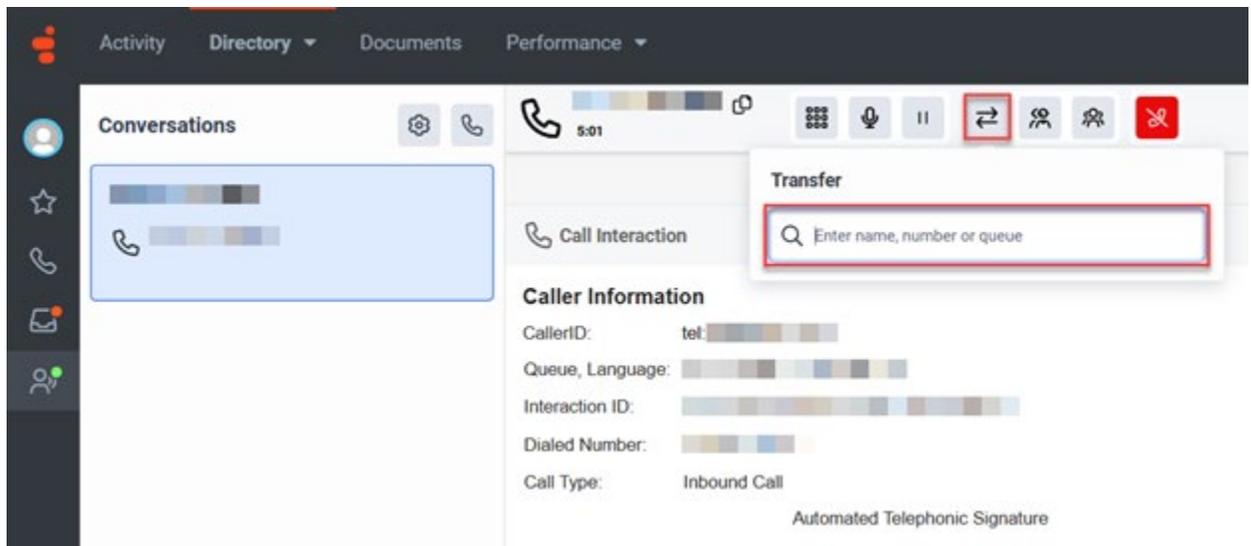
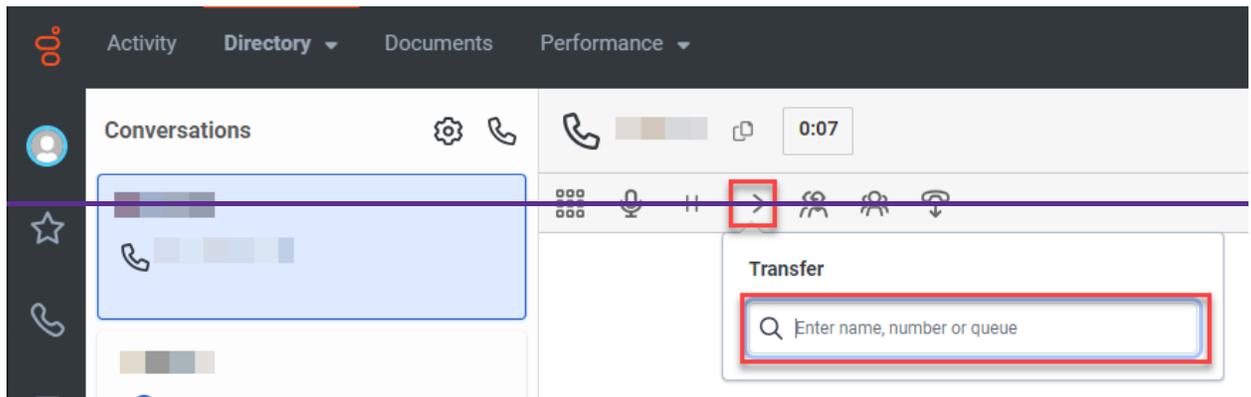
(Video instructions available: [Transferring a Call](#))

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.

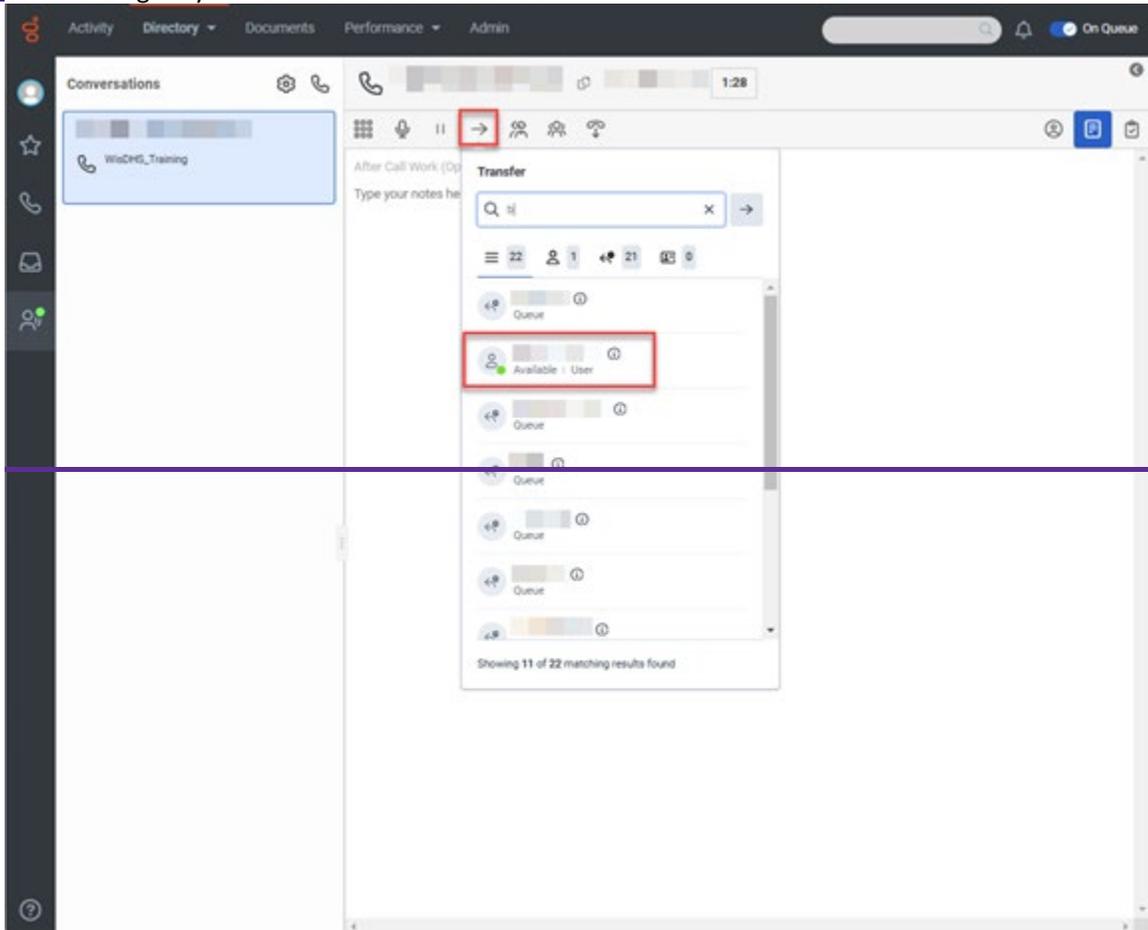
Note Calls can be transferred to internal Genesys users, Genesys queues, or external numbers. The other party can accept or decline the transfer.



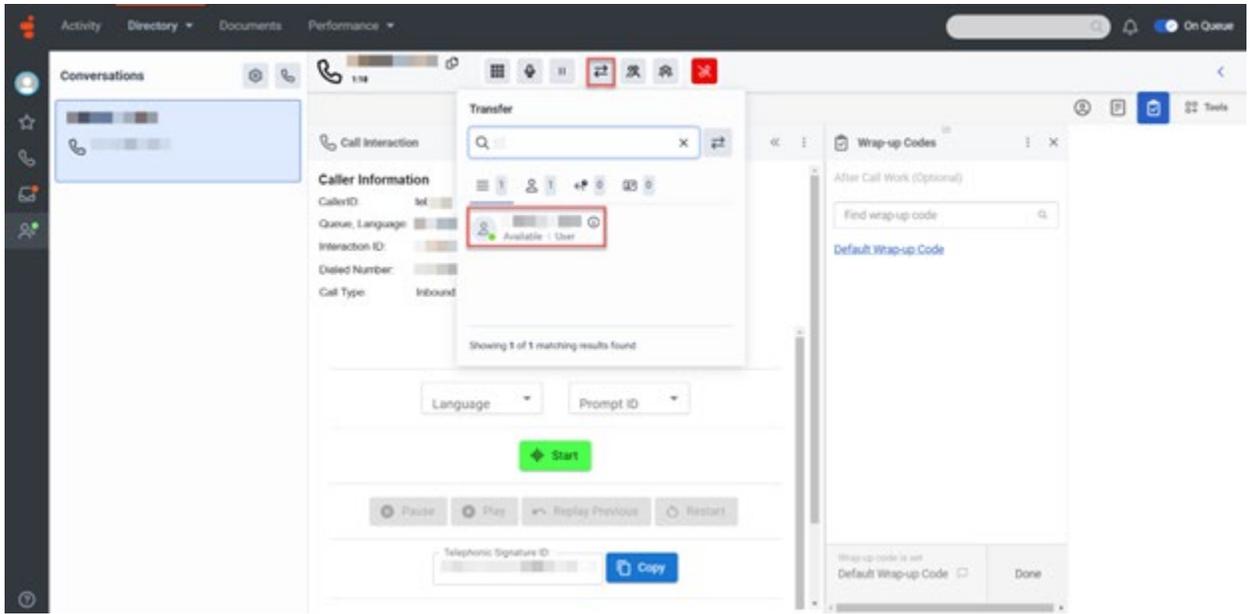
4.5.2 Transferring a Call to a Genesys Agent

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.

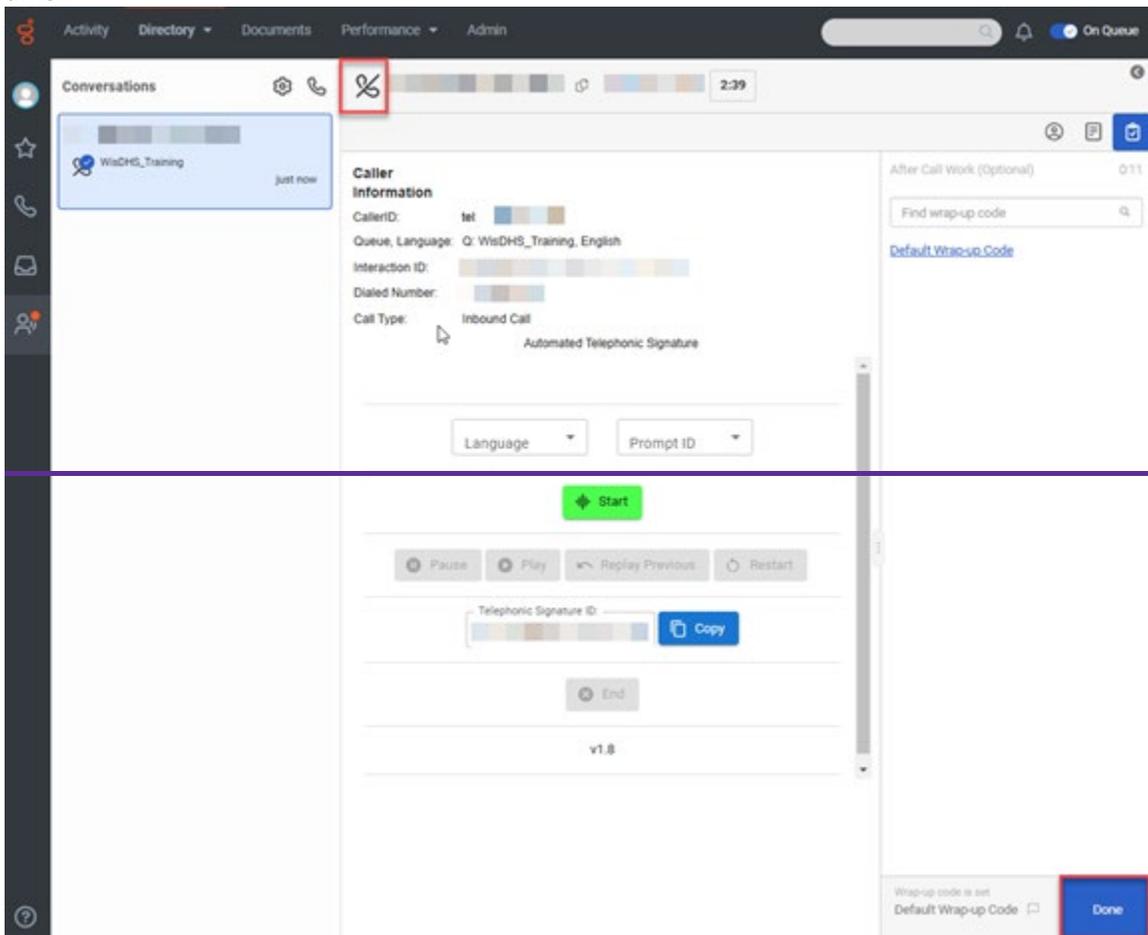


Note Transfer to an available agent, or the call will go to voicemail, which may not be set up.



3.4. 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.

4.5. After completing any after call work, click Done in the bottom right corner to stop the after call timer.



Activity Directory Documents Performance On Queue

Conversations 1:58

Call Interaction

Caller Information

Caller ID: [redacted]
Queue, Language: [redacted]
Interaction ID: [redacted]
Dialed Number: [redacted]
Call Type: Inbound Call
Automated Telephonic Signature

Language [v] Prompt ID [v]

Start

Pause Play Reply Previous Restart

Telephonic Signature ID: [redacted] Copy

Wrap-up Codes

After Call Work (Optional) 0:04

Find wrap-up code [v]

Default Wrap-up Code

Wrap-up code is set
Default Wrap-up Code [v] Done

The image shows a software interface for managing call interactions. At the top, there are navigation tabs: 'Activity', 'Directory', 'Documents', and 'Performance'. On the right side of the top bar, there is a search bar and a status indicator 'On Queue'. Below this, a 'Conversations' sidebar on the left shows a list of call items, with one item highlighted and labeled 'just now'. The main area is titled 'Call Interaction' and displays 'Caller Information' with fields for Caller ID, Queue, Language, Interaction ID, Dialed Number, and Call Type (Inbound Call). Below this information are dropdown menus for 'Language' and 'Prompt ID', a green 'Start' button, and playback controls: 'Pause', 'Play', 'Reply Previous', and 'Restart'. At the bottom of this section is a 'Telephonic Signature ID' field with a 'Copy' button. On the right side, a 'Wrap-up Codes' panel is open, showing 'After Call Work (Optional)' with a timer at '0:04', a search box for 'Find wrap-up code', and a 'Default Wrap-up Code' section. At the bottom of this panel, it indicates 'Wrap-up code is set' and 'Default Wrap-up Code' with a 'Done' button.

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](#))

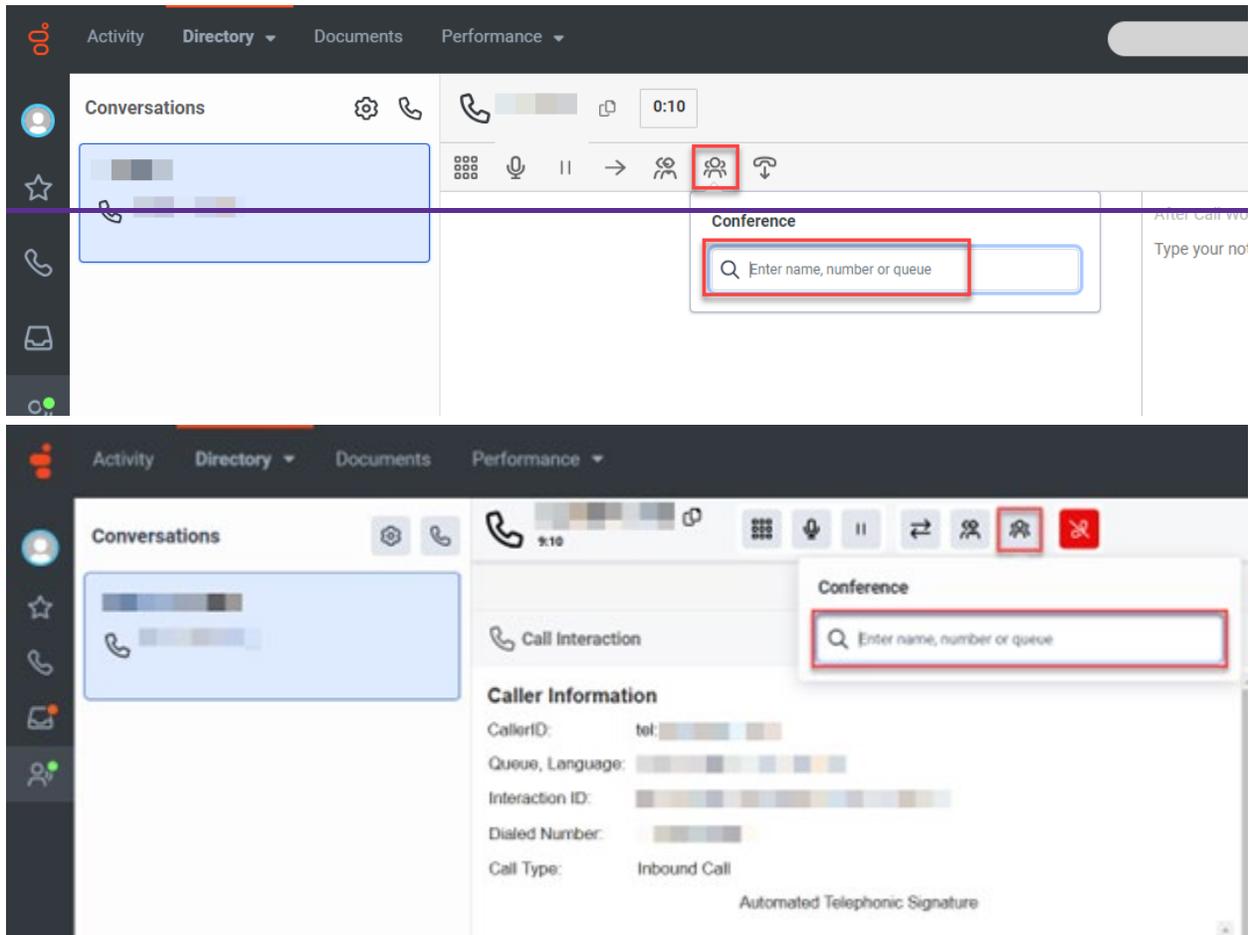
A conference adds an additional party to the call. Select the help button in the bottom left corner of the window for help text specific to this view.

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.

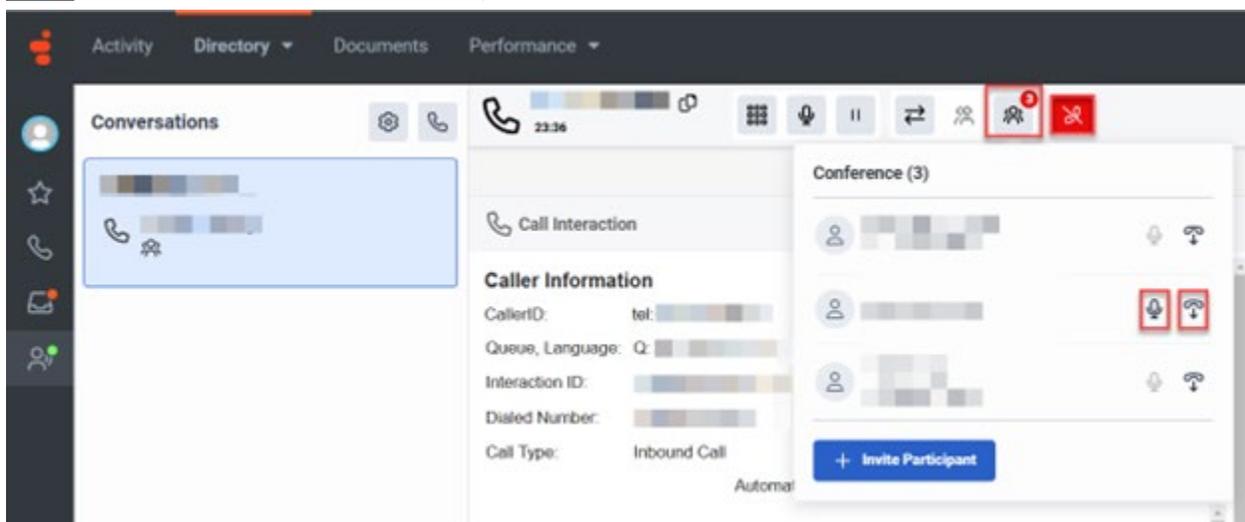
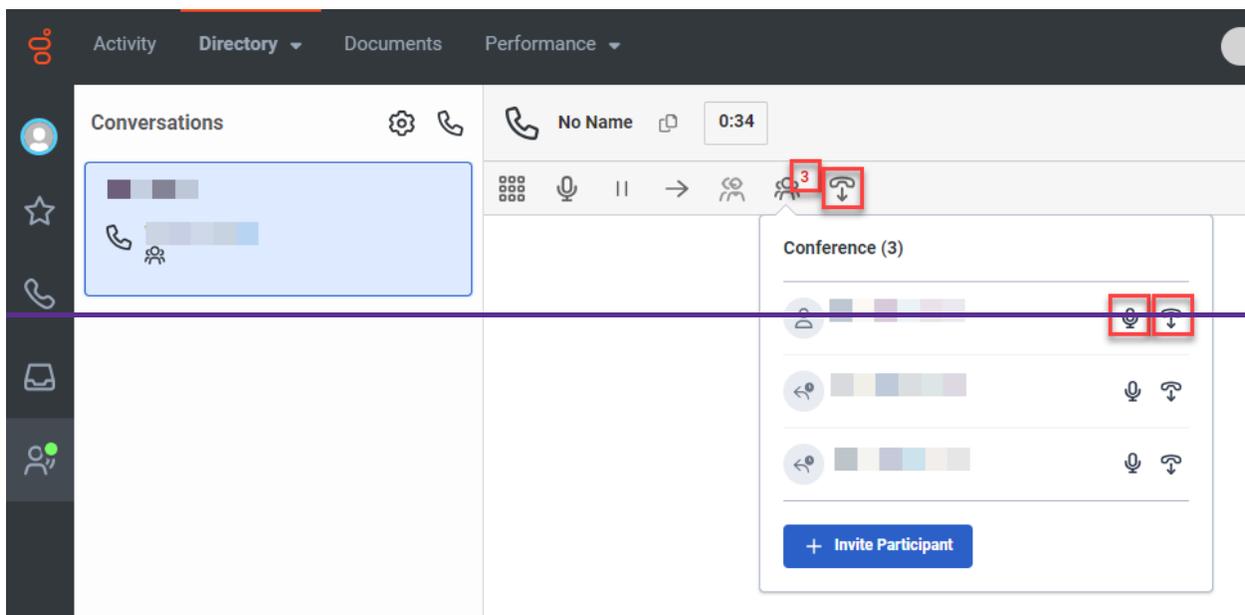


4.6.2 Place a Conferenced Party On Hold or Remove Them From the Call

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](#)

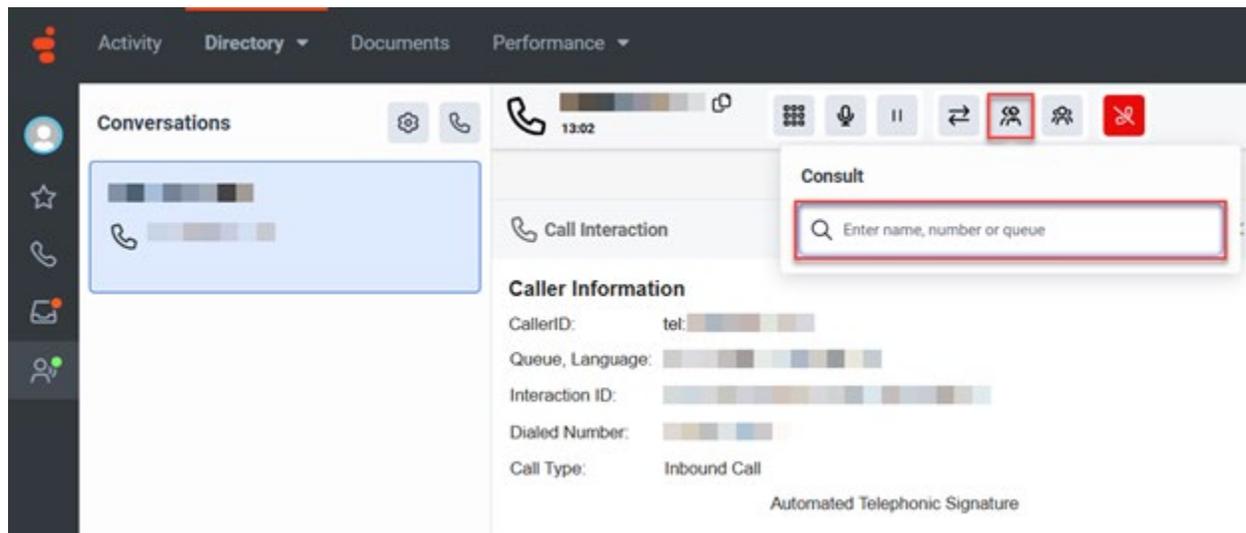
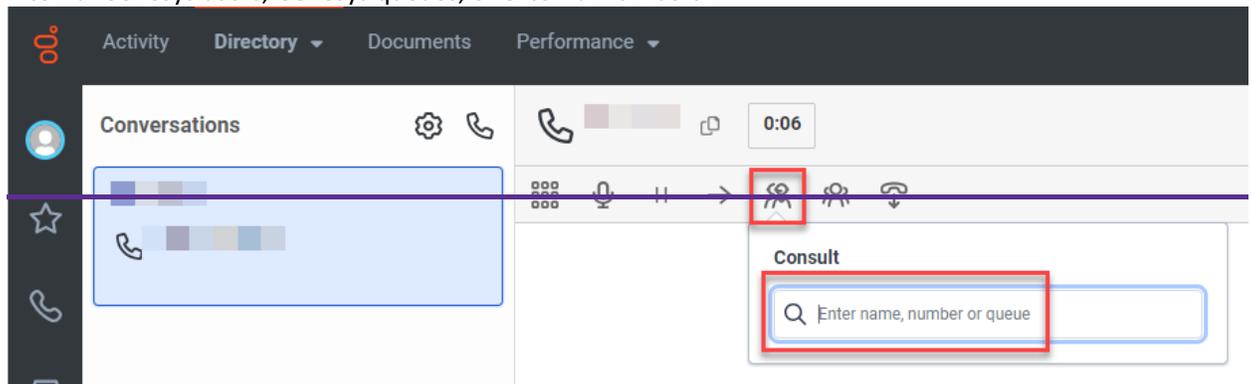
[4.7.3 Bring All Parties Together in a Conference Call](#)

(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.

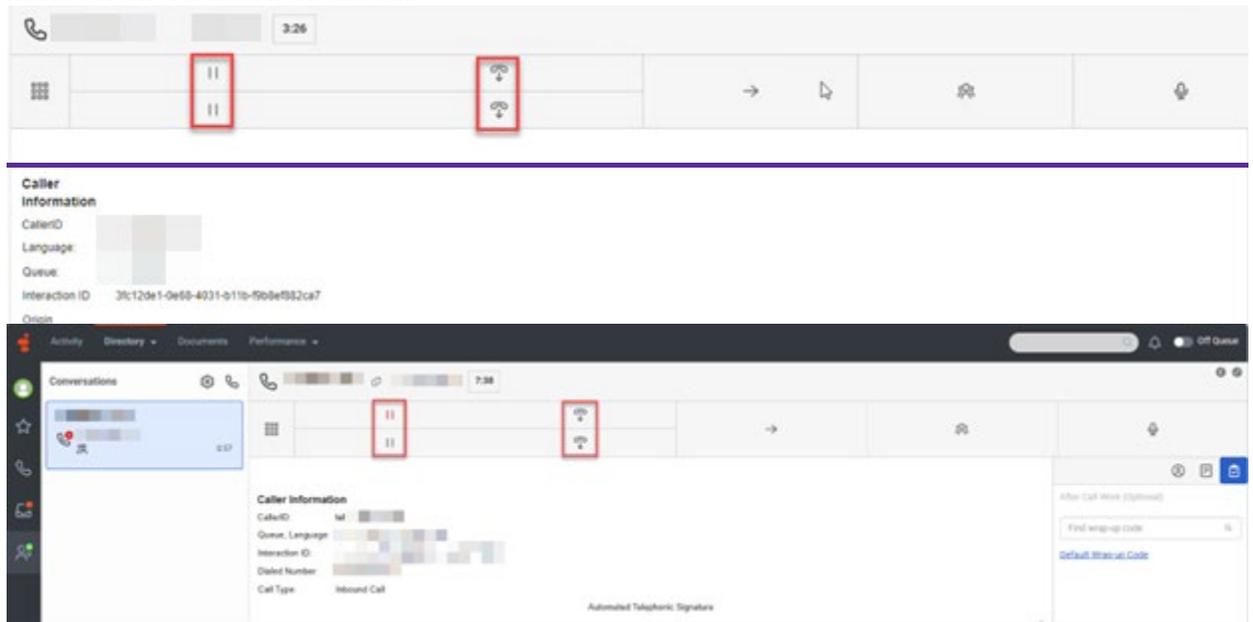
To do a consult call:

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.



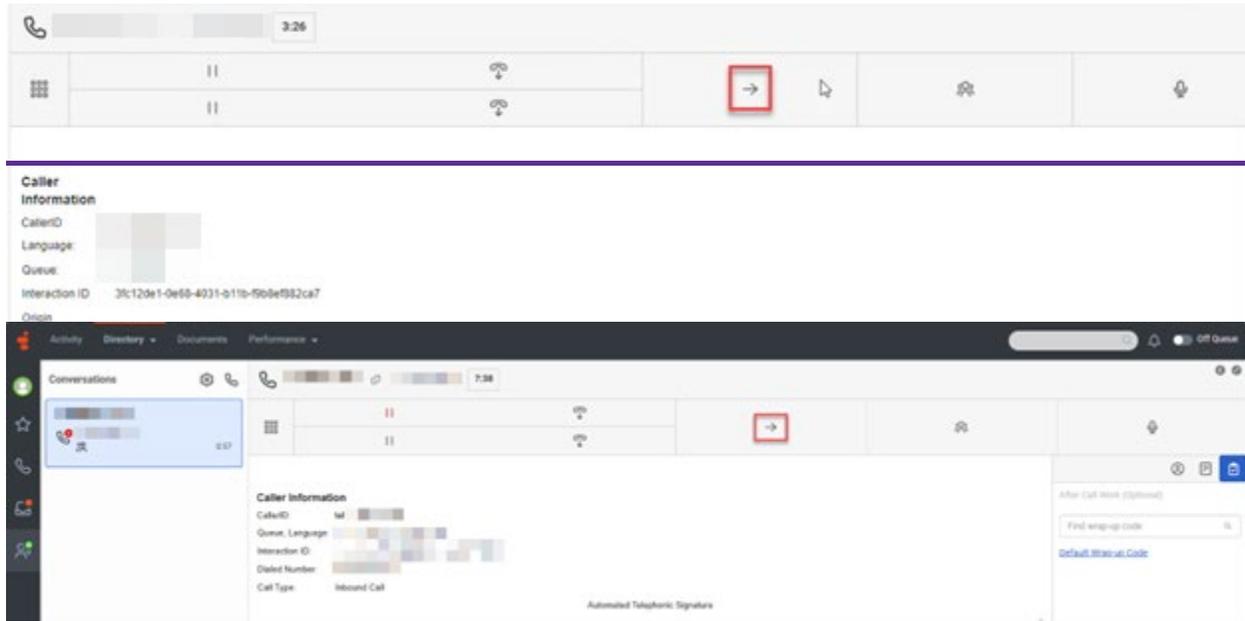
4.7.1 Place a Party On Hold or Remove Them From the Call

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.



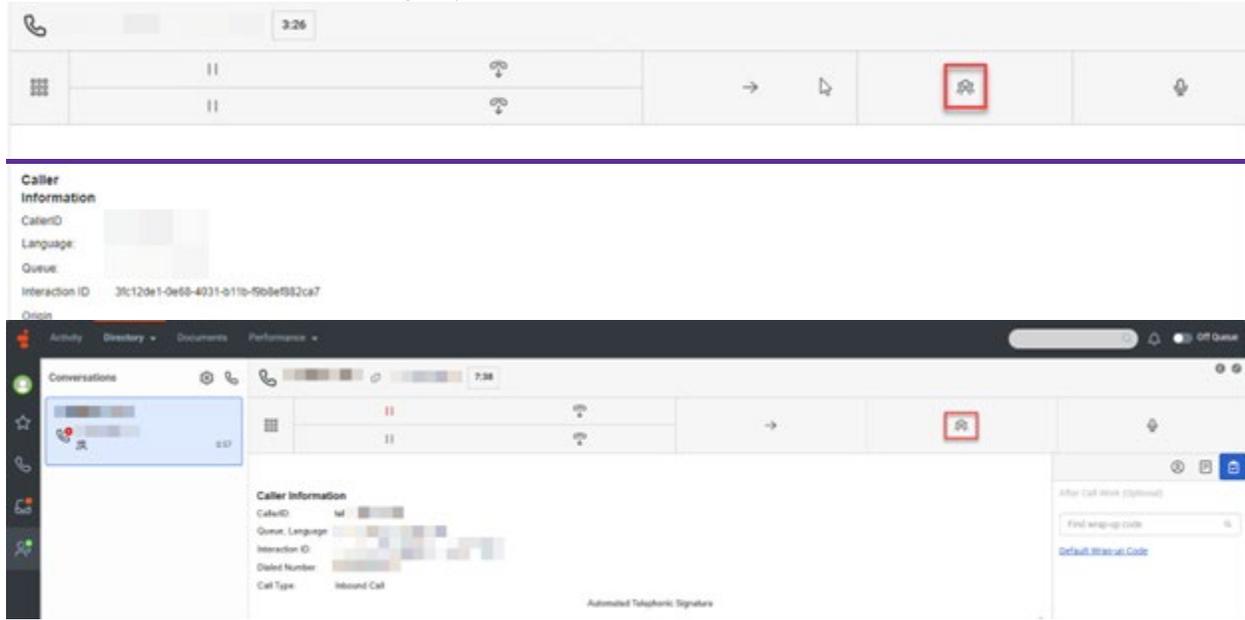
4.7.2 Transfer the Second Party to the Third Party

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

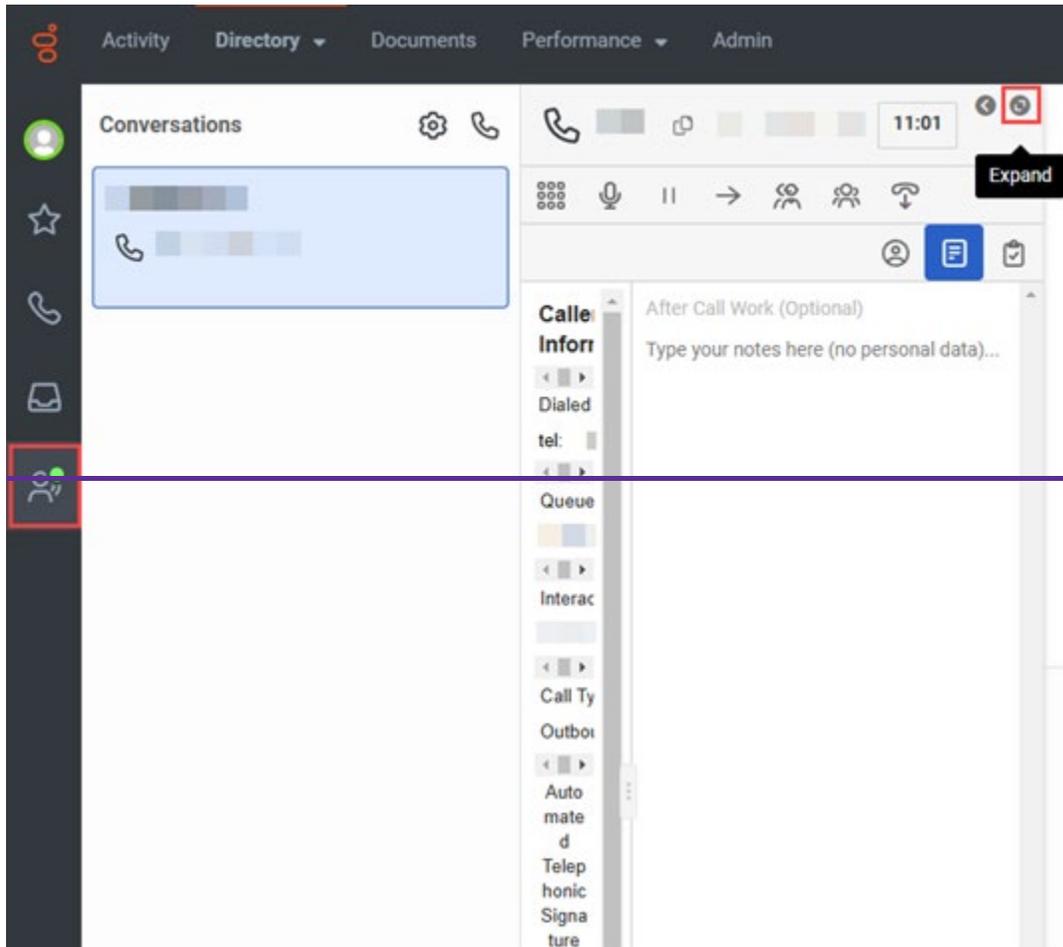
Click the conference button to bring all parties into the call.



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.



Activity Directory Documents Performance Admin 13:50

Conversations

Caller Information

Dialed Number: tel: [redacted]
Queue: [redacted]
Interaction ID: [redacted]
Call Type: Outbound Call

Automated Telephonic Signature

Language Prompt ID

Start

Pause Play Replay Previous Restart

Telephonic Signature ID: [redacted] Copy

End

v1.8

After Call Work (Optional)
Type your notes here (no personal data)...

Activity Directory Documents Performance

Conversations

Wrap-up Codes

After Call Work (Optional)

Find wrap-up code

Default Wrap-up Code

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

Select more tools to open.

Activity Directory Documents Performance Off Queue

Conversations 1232

Call Interaction

Caller Information

CallerID: 123 456 789
Queue, Language: 123 456 789
Interaction ID: 123 456 789
Dialed Number: 123 456 789
Call Type: Inbound Call
Automated Telephonic Signature

Language Prompt ID

Start

Pause Play Replay Previous Restart

Telephonic Signature ID Copy

Wrap-up Codes

After Call Work (Optional)

Find wrap-up code

Default Wrap-up Code

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

The image shows a software interface for managing call interactions. On the left, there's a sidebar with navigation icons and a 'Conversations' list. The main area is split into two panes. The left pane, titled 'Call Interaction', displays 'Caller Information' with fields for CallerID, Queue, Language, Interaction ID, Dialed Number, and Call Type. Below this are controls for 'Language' and 'Prompt ID', a green 'Start' button, and playback controls like 'Pause', 'Play', 'Replay Previous', and 'Restart'. At the bottom of this pane is a 'Telephonic Signature ID' field with a 'Copy' button. The right pane, titled 'Wrap-up Codes', has a search bar 'Find wrap-up code' and a 'Default Wrap-up Code' link. At the bottom of this pane, there's a section for 'Wrap-up code is set' with a 'Default Wrap-up Code' checkbox and a 'Done' button. The top of the interface has a navigation bar with 'Activity', 'Directory', 'Documents', and 'Performance' menus, and a status bar on the right showing 'Off Queue'.

6 Supervisors

[6.1 Introduction to Performance](#)

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

[6.1.1.1 Default Agent Performance View](#)

[6.1.2 Viewing Agent Status](#) (Video instructions available: [Viewing Agent Status](#))

[6.1.2.1 Agent Status View](#)

[6.1.2.1.1 Busy Secondary Status](#)

[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](#))

[6.1.3.1 Default Queue Activity View](#)

[6.1.4 Viewing Queue Performance](#) (Video instructions available: [Viewing Queue Performance](#))

[6.1.4.1 Default Queue Performance View](#)

[6.1.5 Viewing Interaction Details](#) (Video instructions available: [Viewing Interaction Details](#))

[6.1.5.1 Default Interactions View](#)

[6.1.6 Creating a Dashboard](#) (Video instructions available: [Creating a Dashboard](#))

[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](#))

[6.2.1.1 Selecting a Live Call](#)

[6.2.1.2 Coaching a Call](#)

[6.2.1.3 Monitoring a Call](#)

[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](#)

[6.2.5 Activate and Deactivate Agents in a 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](#))

[6.1.1.1 Default Agent Performance View](#)

[6.1.2 Viewing Agent Status](#) (Video instructions available: [Viewing Agent Status](#))

[6.1.2.1 Agent Status View](#)

[6.1.2.1.1 Busy Secondary Statuses](#)

[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](#))

[6.1.3.1 Default Queue Activity View](#)

[6.1.4 Viewing Queue Performance](#) (Video instructions available: [Viewing Queue Performance](#))

[6.1.4.1 Default Queue Performance View](#)

[6.1.5 Viewing Interaction Details](#) (Video instructions available: [Viewing Interaction Details](#))

[6.1.5.1 Default Interactions View](#)

[6.1.6 Creating a Dashboard](#) (Video instructions available: [Creating a Dashboard](#))

[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.

- Agent Performance *Show/Hide an example of the view* [SEE SECTION 6.1.1 VIEWING AGENT PERFORMANCE STATISTICS](#).

Activity Directory Documents Performance

Agent Performance

Performance Statuses Evaluations Insights Leaderboards Development

May 7, 2024

	Time in Sta...	Status	Answer	Handle	Avg Handle	Avg Talk	Avg Hold	Avg ACW	Hold	Transfer
	N/A	N/A	-	4	5m 36s	7m 3s	-	-	-	-

Chart Unavailable Select a column in the summary row

Agent	Time in Sta...	Status	Answer	Handle	Avg Handle	Avg Talk	Avg Hold	Avg ACW	Hold	Transfer
1 day	Offline	-	-	-	-	-	-	-	-	-
7 days	Offline	-	-	-	-	-	-	-	-	-
56 days	Offline	-	-	-	-	-	-	-	-	-
21h 41m 39s	Offline	-	-	-	-	-	-	-	-	-
83 days	Offline	-	-	-	-	-	-	-	-	-
49 days	Offline	-	-	-	-	-	-	-	-	-
5 days	Offline	-	-	-	-	-	-	-	-	-
5 days	Offline	-	-	-	-	-	-	-	-	-
23h 7m 31s	Offline	-	-	-	-	-	-	-	-	-
1h 4m 6s	On Queue	-	4	5m 36s	7m 3s	-	-	-	-	-
1h 38m 25s	Available	-	-	-	-	-	-	-	-	-
7 days	Offline	-	-	-	-	-	-	-	-	-

1 - 17 of 17 agents

- Agent Status *Show/Hide an example of the view* [SEE SECTION 6.1.2 AGENT STATUS](#) [SEE SECTION 6.1.2 VIEWING AGENT STATUS.](#)

Activity Directory Documents Performance

Agent Status

Performance Statuses Evaluations Insights Leaderboards Development

May 7, 2024

	Time in St...	Status	Logged In	On Queue	Idle	Not Resp...	Off Queue	Available	Away	Break	Meal
	N/A	N/A	1 day 1h 43m 57s	1h 9m 29s	1h 8m 0s	14s	1 day 34m 28s	1 day 34m 28s	-	-	-

Chart Unavailable Select a column in the summary row

Agent	Time in St...	Status	Logged In	On Queue	Idle	Not Resp...	Off Queue	Available	Away	Break	Meal
1 day 4h 16m 28s	Offline	-	-	-	-	-	-	-	-	-	-
7 days 51m 52s	Offline	-	-	-	-	-	-	-	-	-	-
56 days 22h 36m 56s	Offline	-	-	-	-	-	-	-	-	-	-
21h 46m 26s	Offline	-	-	-	-	-	-	-	-	-	-
83 days 4h 49m 20s	Offline	-	-	-	-	-	-	-	-	-	-
49 days 22h 30m 32s	Offline	-	-	-	-	-	-	-	-	-	-
5 days 18h 43m 46s	Offline	-	-	-	-	-	-	-	-	-	-
5 days 2h 47m 1s	Offline	-	-	-	-	-	-	-	-	-	-
23h 12m 17s	Offline	-	-	-	-	-	-	-	-	-	-

1 - 17 of 17 agents

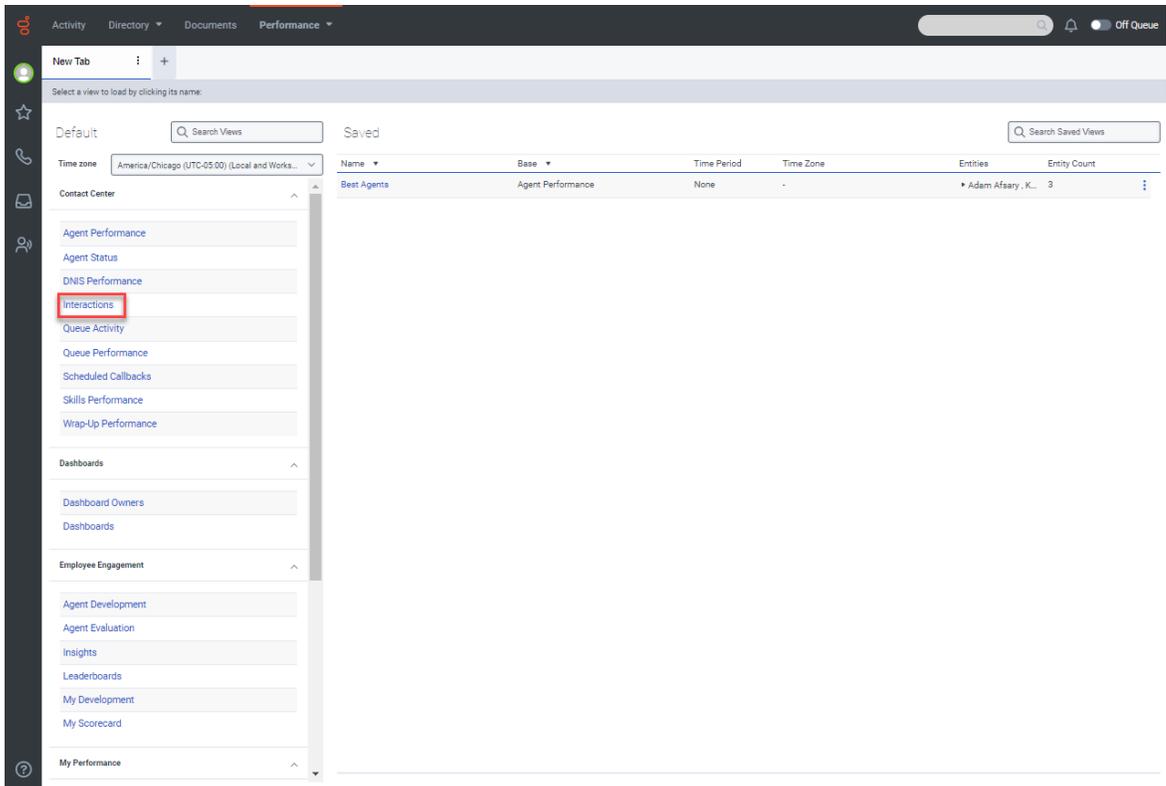
- Queue Activity *Show/Hide an example of the view* [SEE SECTION 6.1.3 VIEWING QUEUE ACTIVITY.](#)

Name	Waiting	Interactions	Service Level % Interval/Day	On Queue	Off Queue	Interacting	Communicating	Idle
ChildCare_Crawford_County_VM	0	0	- -	N/A	N/A	N/A	N/A	N/A
ChildCare_Grant_County_VM	0	0	- -	0	0	0	0	0
ChildCare_Green_County_VM	0	0	- -	0	0	0	0	0
ChildCare_Iowa_County_VM	0	0	- -	0	0	0	0	0
ChildCare_Jefferson_County_VM	0	0	- -	0	0	0	0	0
ChildCare_LaFayette_County_VM	0	0	- -	0	0	0	0	0
Southern_CC_Crawford	0	0	- -	0	0	0	0	0
Southern_CC_Grant	0	0	- -	0	0	0	0	0
Southern_CC_Green	0	0	- -	0	0	0	0	0
Southern_CC_Iowa	0	0	- -	0	0	0	0	0

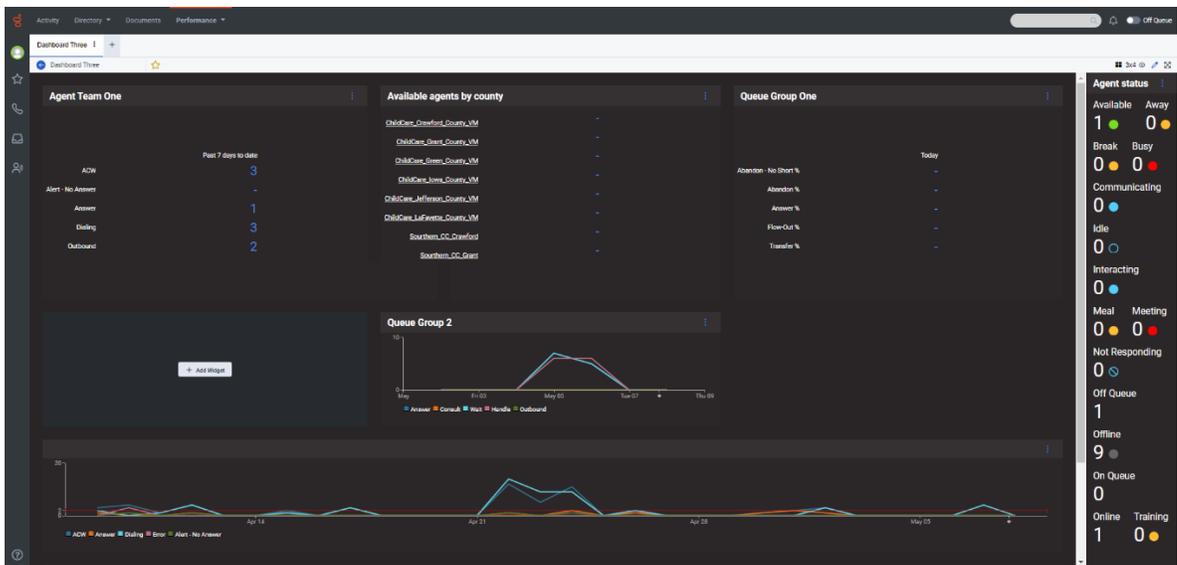
- Queue Performance *Show/Hide an example of the view* [SEE SECTION 6.1.4 VIEWING QUEUE PERFORMANCE.](#)

Name	Waiting	Interactions	Service Level % Interval/Day	On Queue	Off Queue	Interacting	Communicating	Idle
WisDHS_Test_1	21	5 24%	15 71%	20s	15% 60%	17m 44s	30m 53s	1m 11s
WisDHS_Test_1_VM	-	-	-	-	-	-	-	-
WisDHS_Test_2	4	-	3 75%	-	0% 80%	1h 31m 35s	9m 14s	4m 14s
WisDHS_Test_2_VM	-	-	-	-	-	-	-	-
WisDHS_Test_3	-	-	-	-	-	8s	8m 20s	21s
WisDHS_Test_3_VM	-	-	-	-	-	-	-	-
WisDHS_Training	14s	27m 53s	1m 17s	17s	26m 58s	5	6	-
WisDHS_Training_OB	-	1m 21s	57s	-	14s	-	-	-

- Interactions *Show/Hide an example of the view* [SEE SECTION 6.1.5 INTERACTIONS VIEWING INTERACTION DETAILS.](#)



- Dashboards *Show/Hide an example of the view* See Section 6.1.6 [Dashboards](#) [Creating a Dashboard](#).

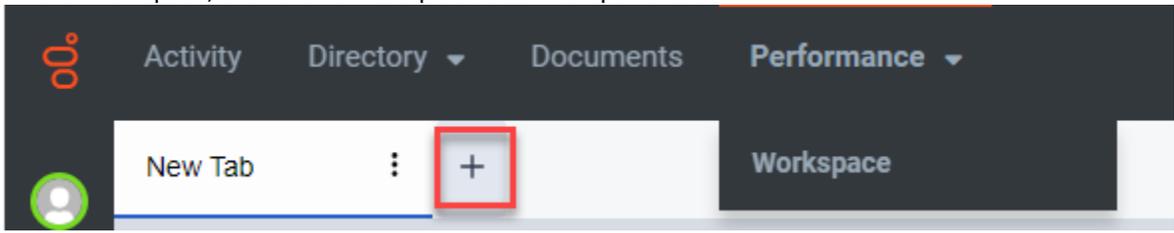


This section describes general navigation in these views. [SECTION 6.1.1 VIEWING AGENT PERFORMANCE STATISTICS](#), [6.1.2 VIEWING AGENT STATUS](#), [6.1.3 VIEWING QUEUE ACTIVITY](#), and [6.1.4 VIEWING QUEUE PERFORMANCE](#) provide view-specific information.

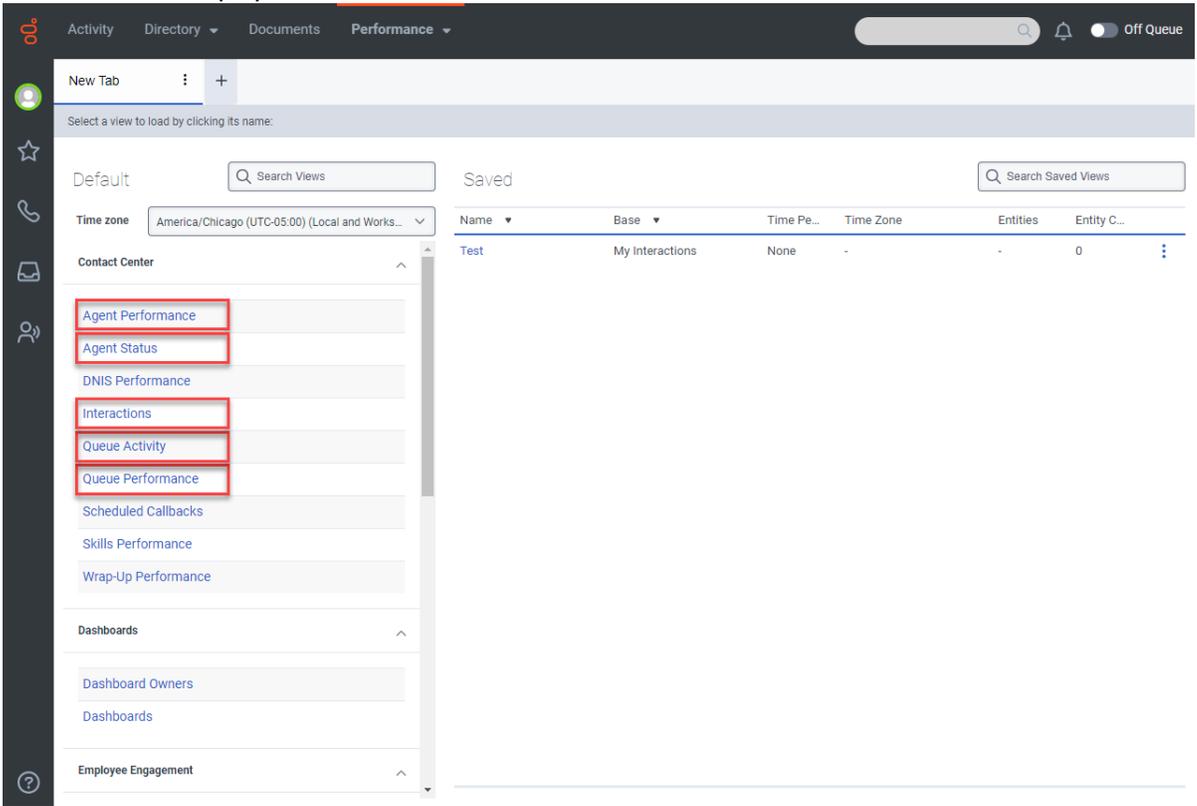
Open a View

To open a view:

1. In the Workspace, click the new tab plus button to open a tab.



2. Select a view to display.



Add or Remove Columns

Default views include the columns that are most likely needed. The view can be customized by removing or adding columns.

1. Click the plus button on the right side of a view to display the Add/Remove Column panel.

The screenshot shows the 'Agent Performance' dashboard. The main table displays performance metrics for 18 agents. The columns include Agent, Time in Status, Status, Answer, Handle, Avg Handle, Avg Talk, Avg Hold, Avg ACW, Hold, and Transfer. A red box highlights the plus button in the table header. On the right, the 'Add/Remove Column' panel is open, showing a search bar and a list of columns with checkboxes to toggle their visibility. The 'Performance' section is currently selected.

Agent	Time in Status	Status	Answer	Handle	Avg Handle	Avg Talk	Avg Hold	Avg ACW	Hold	Transfer
N/A	N/A	N/A	334	504	20m 4s	1m 30s	13m 42s	19m 49s	11	38
A	11 03y,s	Offline	-	2	15m 29m 26s	5s	-	15m 29m 6s	-	-
B	2 03y,s	Offline	54	58	6m 13s	55s	24m 52s	2m 44s	6	-
G	7 03y,s	Offline	-	-	-	-	-	-	-	-
Z	11 03y,s	Offline	-	-	-	-	-	-	-	-
J	1 03y	Offline	-	-	-	-	-	-	-	-
H	101 03y,s	Offline	-	-	-	-	-	-	-	-
J	1 03y	Offline	-	-	-	-	-	-	-	-
K	23 03y,s	Offline	1	1	18m 22m 12s	1s	-	18m 22m 10s	-	-
K	18m 59m 1s	Offline	10	30	10m 27s	5m 3s	23s	6m 7s	3	3
M	6m 39m 46s	Available	43	44	29m 40s	5m 47s	-	23m 53s	-	-
M	3m 37m 46s	Offline	-	28	12m 59s	2m 50s	-	13m 37s	-	3
P	1 03y	Offline	33	65	7m 34s	2m 22s	-	5m 52s	-	8
R	1 03y	Offline	-	8	2m 14s	2m 8s	-	-	-	-
R	2 98 03y,s	Offline	-	-	-	-	-	-	-	-
R	3 03y,s	Offline	4	4	4m 26s	3m 39s	-	48s	-	-
R	2m 27m 6s	Available	8	68	1m 0m 32s	15s	8s	1m 9m 27s	2	1
R	20m 19m 39s	Offline	180	195	51s	10s	-	43s	-	23
S	10 03y,s	Offline	1	1	2m 59s	1m 31s	-	1m 28s	-	-

2. Click the check boxes to add or remove columns from the display.
3. Click **Save**.

Isolate Selected Items

Click the check boxes next to the agent or queue and click **Add to filters** to isolate those items.

Activity Directory Documents Performance

Agent Perform... +

Performance Statuses Evaluations Insights Leaderboards Development

April 2024

	Answer	Handle	Avg Handle	Avg Talk	Avg Hold	Avg ACW	Hold	Transfer
	334	504	20m 4s	1m 30s	13m 42s	19m 49s	11	38

Chart Unavailable Select a column in the summary row

Add to filters Deselect all Selected Rows: 3

Agent	Answer	Handle	Avg Handle	Avg Talk	Avg Hold	Avg ACW	Hold	Transfer
<input checked="" type="checkbox"/>	-	2	15n 29m 26s	5s	-	15n 29m 6s	-	-
<input checked="" type="checkbox"/>	54	58	6m 13s	55s	24m 52s	2m 44s	6	-
<input type="checkbox"/>	-	-	-	-	-	-	-	-
<input type="checkbox"/>	-	-	-	-	-	-	-	-
<input type="checkbox"/>	-	-	-	-	-	-	-	-
<input type="checkbox"/>	1	1	18n 22m 12s	1s	-	18n 22m 10s	-	-
<input checked="" type="checkbox"/>	10	30	10m 27s	5m 3s	23s	6m 7s	3	3
<input type="checkbox"/>	43	44	29m 40s	5m 47s	-	23m 53s	-	-
<input type="checkbox"/>	-	28	12m 59s	2m 50s	-	13m 37s	-	3
<input type="checkbox"/>	33	65	7m 34s	2m 22s	-	5m 52s	-	8
<input type="checkbox"/>	-	8	2m 14s	2m 8s	-	-	-	-

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The selected items are displayed individually.

Activity Directory Documents Performance

Agent Perform... +

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April 2024

	Answer	Handle	Avg Handle	Avg Talk	Avg Hold	Avg ACW	Hold	Transfer
	64	90	28m 9s	2m 9s	16m 43s	24m 39s	9	3

Chart Unavailable Select a column in the summary row

View as group • Clear All

Agent	Answer	Handle	Avg Handle	Avg Talk	Avg Hold	Avg ACW	Hold	Transfer
<input type="checkbox"/>	-	2	15n 29m 26s	5s	-	15n 29m 6s	-	-
<input checked="" type="checkbox"/>	54	58	6m 13s	55s	24m 52s	2m 44s	6	-
<input checked="" type="checkbox"/>	10	30	10m 27s	5m 3s	23s	6m 7s	3	3

1 - 3 of 3 agents

Some views include a View as group button. Click this to aggregate the information for the selected items.

Interval	Answer	Handle	Avg Handle	Avg Talk	Avg Hold	Avg ACW	Hold	Transfer
Apr 1, 2024	2	2	1m 12s	18s	-	55s	-	-
Apr 2, 2024	-	-	-	-	-	-	-	-
Apr 3, 2024	1	1	18m 50s	10m 45s	6s	7m 59s	1	-
Apr 4, 2024	-	-	-	-	-	-	-	-
Apr 5, 2024	2	2	3m 23s	1m 48s	-	1m 34s	-	-
Apr 6, 2024	-	-	-	-	-	-	-	-
Apr 7, 2024	3	3	4m 38s	3m 40s	-	58s	-	-
Apr 8, 2024	13	15	2m 0s	1m 7s	-	56s	-	-
Apr 9, 2024	-	4	2m 32s	2m 26s	-	6s	-	-
Apr 10, 2024	-	1	1h 6m 32s	12s	-	1h 6m 10s	-	-
Apr 11, 2024	3	9	31m 25s	7m 33s	43m 1s	9m 25s	3	-
Apr 12, 2024	-	-	-	-	-	-	-	-
Apr 13, 2024	-	-	-	-	-	-	-	-

Save, Filter, or Export a View

Use the buttons on the right of the view to save, refresh, filter, or download views.

Interval	Answer	Handle	Avg Handle	Avg Talk	Avg Hold	Avg ACW	Hold	Transfer
Apr 1, 2024	2	2	1m 12s	18s	-	55s	-	-
Apr 2, 2024	-	-	-	-	-	-	-	-
Apr 3, 2024	1	1	18m 50s	10m 45s	6s	7m 59s	1	-
Apr 4, 2024	-	-	-	-	-	-	-	-
Apr 5, 2024	2	2	3m 23s	1m 48s	-	1m 34s	-	-
Apr 6, 2024	-	-	-	-	-	-	-	-
Apr 7, 2024	3	3	4m 38s	3m 40s	-	58s	-	-
Apr 8, 2024	13	15	2m 0s	1m 7s	-	56s	-	-
Apr 9, 2024	-	4	2m 32s	2m 26s	-	6s	-	-
Apr 10, 2024	-	1	1h 6m 32s	12s	-	1h 6m 10s	-	-
Apr 11, 2024	3	9	31m 25s	7m 33s	43m 1s	9m 25s	3	-
Apr 12, 2024	-	-	-	-	-	-	-	-
Apr 13, 2024	-	-	-	-	-	-	-	-

Save and Open a View

Click **Save** and enter a name for the saved view. The tab's name displays.

The screenshot shows a performance dashboard with a table of agent metrics. A 'SAVE VIEW' dialog is open on the right side of the screen. The dialog has two tabs: 'Save View As' (selected) and 'Overwrite Existing View'. Under 'View Name', the text 'Best Agents' is entered in a text box. Under 'Default time period', 'Last Month' is selected in a dropdown menu. At the bottom of the dialog, there are 'Save' and 'Cancel' buttons. The 'Save' button is highlighted in blue. In the background, a table displays performance metrics for three agents. The table has columns: Agent, Answer, Handle, Avg Handle, Avg Talk, Avg Hold, Avg ACW, Hold, and Transfer. The first row shows values: 64, 90, 28m 9s, 2m 9s, 16m 43s, 24m 39s, 9, 3. The second row shows values: 2, 15h 29m 26s, 5s, -, 15h 29m 6s, -. The third row shows values: 54, 58, 6m 13s, 55s, 24m 52s, 2m 44s, 6, -. The fourth row shows values: 10, 30, 10m 27s, 5m 3s, 23s, 6m 7s, 3, 3. A 'Chart Unavailable' message is visible above the table. The top navigation bar includes 'Activity', 'Directory', 'Documents', and 'Performance'. The top right corner has a search bar, a bell icon, and an 'Off Queue' toggle.

Agent	Answer	Handle	Avg Handle	Avg Talk	Avg Hold	Avg ACW	Hold	Transfer
	64	90	28m 9s	2m 9s	16m 43s	24m 39s	9	3
	2	15h 29m 26s	5s	-	15h 29m 6s	-	-	-
	54	58	6m 13s	55s	24m 52s	2m 44s	6	-
	10	30	10m 27s	5m 3s	23s	6m 7s	3	3

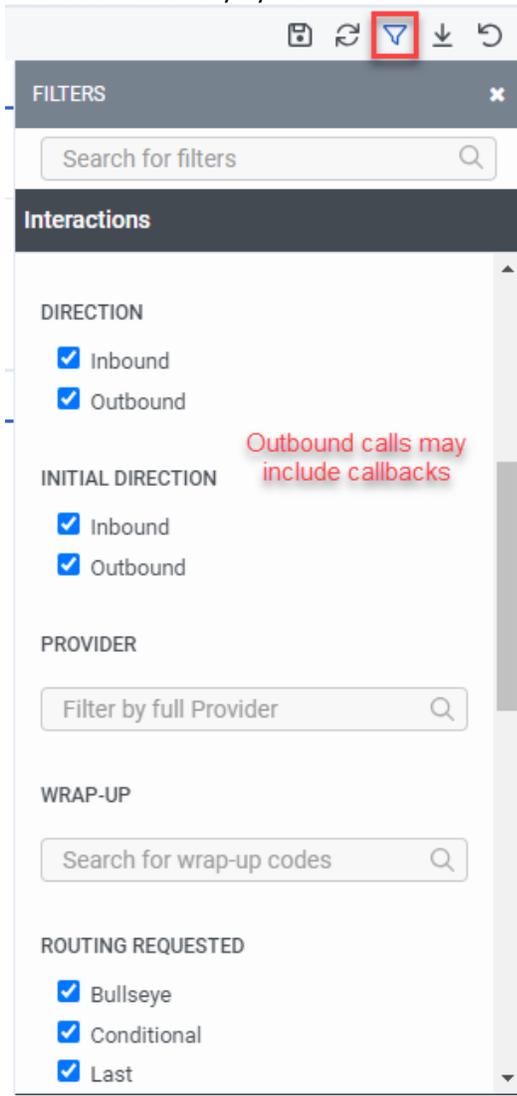
To later open that view, click the new tab plus button and select the saved view from the list.

The screenshot shows a performance dashboard with a dark sidebar on the left and a main content area. The sidebar contains navigation icons and a search bar. The main content area has a top navigation bar with 'Activity', 'Directory', 'Documents', and 'Performance'. Below this is a 'New Tab' section with a red box around a '+' icon. The main area is divided into 'Default' and 'Saved' sections, each with a search bar. A table of views is displayed, with the 'Best Agents' view highlighted by a red box. The table has columns for Name, Base, Time Pe..., Time Zone, Entities, and Entity C... The 'Best Agents' view is associated with 'Agent Performance' and 'Last Month'.

Name	Base	Time Pe...	Time Zone	Entities	Entity C...
Best Agents	Agent Performance	Last Month	-	...	3

Filter a View

Click the filter button to open the filtering panel, and then select options to change the filtering defaults. Available filters vary by view.



Changes to the default filter settings are displayed in the view.

The screenshot shows a performance dashboard for 'Best Agents' in April 2024. The main table displays agent performance metrics. A red box highlights the 'Initial Direction: Outbound' dropdown menu in the first row of the table. Another red box highlights the 'Outbound' checkbox in the 'INITIAL DIRECTION' section of the filters panel on the right.

Agent	Answer	Handle	Avg Handle	Avg Talk	Avg Hold	Avg ACW	Hold	Transfer
[Redacted]	-	25	1h 24m 32s	4m 13s	-	1h 24m 12s	-	1
[Redacted]	2	15m 29m 26s	5s	-	15m 29m 6s	-	-	-
[Redacted]	4	15s	5s	-	9s	-	-	-
[Redacted]	19	13m 21s	5m 52s	-	9m 0s	-	-	1

Reset a View

Click the reset button to reset the view to the defaults or reset a saved view to its saved settings.



6.1.1 Viewing Agent Performance Statistics

6.1.1.1 Default Agent Performance View

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

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

6.1.1.1 Default Agent Performance View

The default agent performance view displays all agents in your line of business for the selected time period. The information displayed includes the average number of calls handled, average talk and hold times, number of holds, etc. 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 INTRODUCTION TO PERFORMANCE.](#)

The screenshot displays the 'Agent Performance' view in a software interface. The interface includes a top navigation bar with 'Activity', 'Directory', 'Documents', and 'Performance'. Below this, there are tabs for 'Performance', 'Statuses', 'Evaluations', 'Insights', 'Leaderboards', and 'Development'. The main content area shows a summary table for all agents and a detailed table for individual agents. Red callouts point to the summary table and the individual agents table.

Totals and averages for all agents

Answer	Handle	Avg Handle	Avg Talk	Avg Hold	Avg ACW	Hold	Transfer
334	504	20m 4s	1m 30s	13m 42s	19m 49s	11	38

Totals and averages for individual agents

Agent	Time in Sta...	Status	Answer	Handle	Avg Handle	Avg Talk	Avg Hold	Avg ACW	Hold	Transfer
	1 day	Offline	-	2	15h 29m 26s	5s	-	15h 29m 6s	-	-
	7 days	Offline	54	58	6m 13s	55s	24m 52s	2m 44s	6	-
	57 days	Offline	-	-	-	-	-	-	-	-
	1 day	Offline	-	-	-	-	-	-	-	-
	83 days	Offline	-	-	-	-	-	-	-	-
	50 days	Offline	-	-	-	-	-	-	-	-
	6 days	Offline	1	1	18h 22m 12s	1s	-	18h 22m 10s	-	-
	5 days	Offline	10	30	10m 27s	5m 3s	23s	6m 7s	3	3
	1 day	Offline	43	44	29m 40s	5m 47s	-	23m 53s	-	-
	8h 8m 53s	On Queue	-	28	12m 59s	2m 50s	-	13m 37s	-	3
	6h 40m 13s	Offline	33	65	7m 34s	2m 22s	-	5m 52s	-	8
	7 days	Offline	-	8	2m 14s	2m 8s	-	-	-	-

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Time in Sta... Status Answer Handle Avg Handle Avg Talk Avg Hold Avg ACW Hold Transfer

N/A N/A 334 504 20m 4s 1m 30s 13m 42s 19m 49s 11 38

Chart Unavailable Select a column in the summary row

Agent Time in Sta... Status Answer Handle Avg Handle Avg Talk Avg Hold Avg ACW Hold Transfer

Agent	Time in Sta...	Status	Answer	Handle	Avg Handle	Avg Talk	Avg Hold	Avg ACW	Hold	Transfer
	1 day	Offline	-	2	15m 29m 26s	5s	-	15m 29m 6s	-	-
	7 days	Offline	54	58	6m 13s	55s	24m 52s	2m 44s	6	-
	57 days	Offline	-	-	-	-	-	-	-	-
	1 day	Offline	-	-	-	-	-	-	-	-
	83 days	Offline	-	-	-	-	-	-	-	-
	50 days	Offline	-	-	-	-	-	-	-	-
	6 days	Offline	1	1	18m 22m 12s	1s	-	18m 22m 10s	-	-
	5 days	Offline	10	30	10m 27s	5m 3s	23s	6m 7s	3	3
	1 day	Offline	43	44	29m 40s	5m 47s	-	23m 53s	-	-
	8h 8m 53s	On Queue	-	28	12m 59s	2m 50s	-	13m 37s	-	3
	6h 40m 13s	Offline	33	65	7m 34s	2m 22s	-	5m 52s	-	8
	7 days	Offline	-	8	2m 14s	2m 8s	-	-	-	-

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6.1.2 Viewing Agent Status

6.1.2.1 Agent Status View

6.1.2.1.1 Busy Secondary Statuses

6.1.2.2 View 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 INTRODUCTION TO PERFORMANCE.](#)

Totals for all agents

Time in St...	Status	Logged In	On Queue	Idle	Not Resp...	Off Queue	Available	Away	Break	Meal
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	Time in St...	Status	Logged In	On Queue	Idle	Not Resp...	Off Queue	Available	Away	Break	Meal
	1 day 11h 27m 58s	Offline	18 days 15h 23m 0s	15h 32m 21s	2m 48s	-	17 days 23h 50m 40s	17 days 23h 34m 45s	2s	-	-
	7 days 8h 3m 23s	Offline	5 days 6h 17m 30s	14h 3m 2s	8h 2m 20s	19s	4 days 16h 14m 28s	4 days 16h 14m 28s	-	-	-
	57 days 5h 48m 26s	Offline	-	-	-	-	-	-	-	-	-
	1 day 4h 57m 56s	Offline	14 days 1h 11m 28s	-	-	-	14 days 1h 11m 28s	14 days 1h 11m 28s	-	-	-
	83 days 12h 0m 50s	Offline	-	-	-	-	-	-	-	-	-
	50 days 5h 42m 3s	Offline	-	-	-	-	-	-	-	-	-
	6 days 1h 55m 16s	Offline	3 days 12h 54m 26s	2m 28s	2m 22s	-	3 days 12h 51m 58s	3 days 12h 51m 58s	-	-	-
	5 days 9h 58m 31s	Offline	4 days 18h 51m 46s	22h 17m 56s	20h 19m 25s	1m 40s	3 days 20h 33m 50s	3 days 20h 26m 57s	3s	53s	-
	1 day 6h 23m 48s	Offline	11 days 15m 46s	2 days 17h 36m 58s	1 day 19h 50m 42s	1m 22s	8 days 6h 38m 48s	8 days 6h 38m 48s	-	-	-

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Agent	Status	Time in St.	Routing S.	Time in R.	Logged In	On Queue	Idle	Not Resp.	Off Queue	Available	Away	Break	Meal	Busy	Busy Sup.	Busy Tec.	Busy App.	Busy Ext.
					8 days 5h 18m 34s	1 day 10m 43m 52s	1 day 5m 5m 43s	9m 16m 13s	8 days 10m 34m 41s	5 days 10m 15m 3s	22s	32s	10s	18m 29s	-	57s	16m 57s	35s
Agent 1	Available	9m 29s	Off Queue	25m 49s	1 day 17h 39m 8s	2h 21m 36s	0h 11m 52s	-	1 day 13m 17m 33s	1 day 14m 57m 59s	22s	32s	10s	18m 29s	-	57s	16m 57s	35s
Agent 2	Offline	3 days 17h 18m 8s	Off Queue	3 days 17h 18m 7s	12h 21m 54s	12m 8s	6m 52s	-	12h 9m 48s	12h 9m 48s	-	-	-	-	-	-	-	-
Agent 3	Available	1m 29m 4s	Off Queue	3 days 17h 9m 35s	3 days 13h 40m 43s	1 day 6m 5m 24s	22m 15m 9s	4m 32m 1s	2 days 12m 35m 19s	2 days 13m 35m 19s	-	-	-	-	-	-	-	-
Agent 4	Offline	249 days 15m 8m 32s	Off Queue	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Agent 5	Offline	20 days 15m 17m 36s	Off Queue	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Agent 6	Offline	3 days 17h 7m 23s	Off Queue	3 days 17h 7m 22s	2 days 3h 28m 33s	11m 4m 47s	5m 21m 48s	4m 44m 12s	1 day 18m 33m 46s	1 day 18m 33m 46s	-	-	-	-	-	-	-	-
Agent 7	Offline	10 days 23h 28m 29s	Off Queue	-	58m 15s	-	-	-	58m 15s	58m 15s	-	-	-	-	-	-	-	-
Agent 8	Offline	290 days 21m 34m 45s	Off Queue	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Agent 9	Offline	310 days 17h 46m 55s	Off Queue	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-

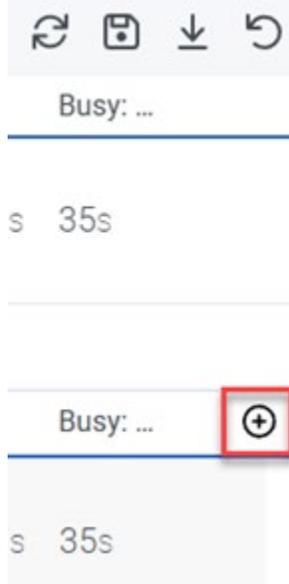
6.1.2.1.1 Busy Secondary Statuses

The busy secondary statuses allow supervisors to see how long an agent was in a particular busy secondary status during the reporting period for the following statuses:

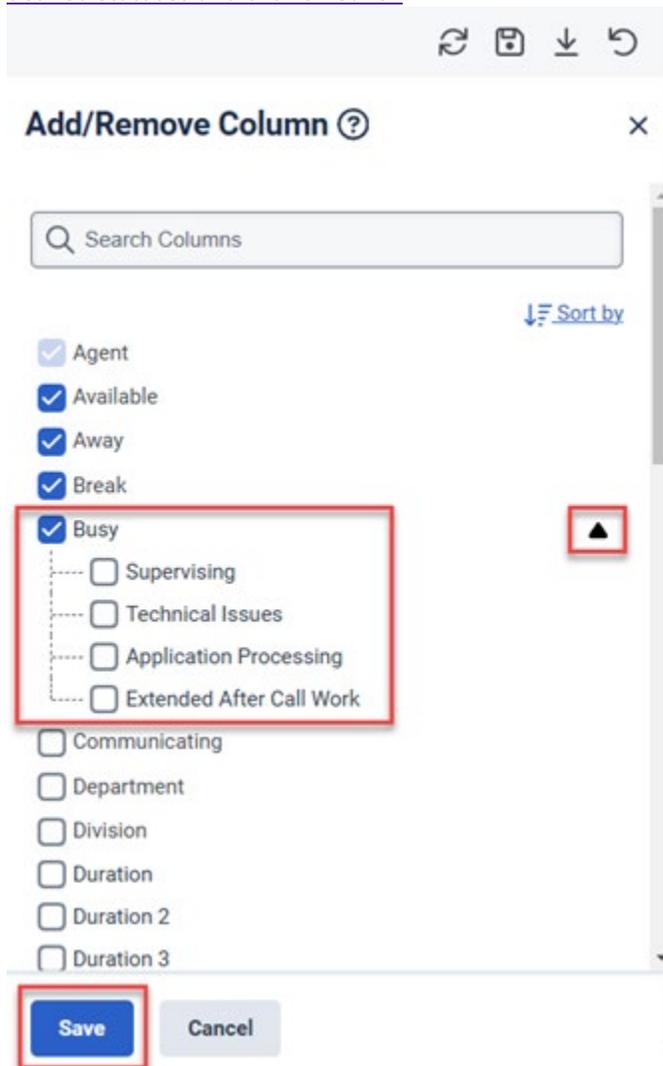
- [Busy: Supervising](#)
- [Busy: Technical Issues](#)
- [Busy: Application Processing](#)
- [Busy: Extended After Call Work](#)

To add this column to the Agent Status view

1. Click the plus Pick Columns button:



2. [Next to the Busy option, click on the triangle to reveal the secondary busy statuses. Select the desired statuses and click on Save.](#)



[These columns give supervisors a historical view of how long an agent was in a specific secondary status. Supervisors may still see how long an agent has currently been in a specific secondary status \(live\) by viewing the Time in Status in the same view.](#)

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.

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 ca, 4' 42" 56s	4' 30" 4s	N/A	3' 49" 17s	2' 2" 48s	-	3' 7" 4s	-	30" 28s	1 ca, 9" 52s	
Agent	Time in Status	Status	Secondary Status	Logged In	On Queue	Routing Status	Idle	Available	Away	Break	Meal	Not Responding	Off Queue
37" 36s	On Queue	On Queue	5' 21" 4s	1' 53" 41s	Idle	1' 53" 41s	25" 19s	-	3' 7" 4s	-	-	3' 27" 22s	
17" 17" 54s	Available	Available	13" 37" 31s	-	Off Queue	-	13" 37" 31s	-	-	-	-	13" 37" 31s	
13" 12s	On Queue	On Queue	5' 8" 56s	2' 39" 34s	Idle	1' 55" 37s	2' 29" 32s	-	-	-	30" 38s	2' 29" 35s	
147 ca, 22" 0" 31s	Offline	Offline	-	-	Off Queue	-	-	-	-	-	-	-	
9 ca, 1' 0" 41" 18s	Offline	Offline	-	-	Off Queue	-	-	-	-	-	-	-	
1' 1" 42s	Available	Available	4' 35" 20s	-	Off Queue	-	4' 35" 20s	-	-	-	-	4' 35" 20s	
188 ca, 2' 25" 43s	Offline	Offline	-	-	Off Queue	-	-	-	-	-	-	-	
208 ca, 22" 39" 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 'Agent Status' view in a software interface. A table displays agent performance metrics for May 15, 2024. The columns include Time in Stat., Status, Logged In, On Queue, Idle, Not Respon..., Off Queue, Available, Away, Break, and Meal. A 'Chart Unavailable' message is present above the table. On the right side, an 'Add/Remove Column' dialog is open, listing various columns with checkboxes. The 'Routing Status' and 'Secondary Status' checkboxes are checked and highlighted with red boxes. The 'Save' button at the bottom of the dialog is also highlighted with a red box.

The selected columns are added to the view.

Activity Directory Documents Performance

Agent Status

Performance Statuses Evaluations Insights Leaderboards Development

May 15, 2024

Agent	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	N/A	1 day, 8h 56m 39s	9h 2m 41s	8h 49m 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	-	-	-

1 - 17 of 17 agents

6.1.3 Viewing Queue Activity

6.1.3.1 Default Queue Activity View

(Video instructions available: [Viewing Queue Activity](#))

The Queue Activity view allows supervisors to display current activity-related queue metrics. Select the help button in the bottom left corner of the window for help text specific to this view.

6.1.3.1 Default Queue Activity View

The default queue activity view displays the current activity occurring in all queues in your line of business. The information displayed includes number of calls waiting; number of current interactions; service level percentage; number of agents on and off queue; number of agents in each status; number of agents interacting, communicating, idle, and not responding for all queues. For information about selecting queues and saving views [SEE SECTION 6.1 SUPERVISOR DESKTOP INTRODUCTION TO PERFORMANCE](#).

	Waiting	Interactions	Service Level % Interval/Day	On Queue	Off Queue	Interacting	Communicating	Idle
	0	0	- -	N/A	N/A	N/A	N/A	N/A
<input type="checkbox"/> Name	Waiting	Interactions	Service Level % Interval/Day	On Queue	Off Queue	Interacting	Communicating	Idle
<input type="checkbox"/> ChildCare_Crawford_County_VM	0	0	- -	0	0	0	0	0
<input type="checkbox"/> ChildCare_Grant_County_VM	0	0	- -	0	0	0	0	0
<input type="checkbox"/> ChildCare_Green_County_VM	0	0	- -	0	0	0	0	0
<input type="checkbox"/> ChildCare_Iowa_County_VM	0	0	- -	0	0	0	0	0
<input type="checkbox"/> ChildCare_Jefferson_County_VM	0	0	- -	0	0	0	0	0
<input type="checkbox"/> ChildCare_LaFayette_County_VM	0	0	- -	0	0	0	0	0
<input type="checkbox"/> Southern_CC_Crawford	0	0	- -	0	0	0	0	0
<input type="checkbox"/> Southern_CC_Grant	0	0	- -	0	0	0	0	0
<input type="checkbox"/> Southern_CC_Green	0	0	- -	0	0	0	0	0
<input type="checkbox"/> Southern_CC_Iowa	0	0	- -	0	0	0	0	0

6.1.4 Viewing Queue Performance

6.1.4.1 Default Queue Performance View

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

The Queue Performance view allows supervisors to display performance-related queue metrics. Select the help button in the bottom left corner of the window for help text specific to this view.

6.1.4.1 Default Queue Performance View

The default queue performance view displays all queues in your line of business for the selected time period. The information displayed includes the total number of calls offered, percent of calls answered, percent of calls abandoned, average speed of answer, service level percentage, average wait, etc. for all queues. The same information is displayed for each individual queue. For information about selecting queues, filtering, exporting, saving views, and ~~downloading~~, [SEE SECTION 6.1 SUPERVISOR DESKTOP INTRODUCTION TO PERFORMANCE.](#)

	Offer	Answer %	Abandon %	ASA	Service Level %	Avg Wait	Avg Handle	Avg Talk	Avg Hold	Avg ACW	Hold	Transfer
Summary	515	345 67%	151 29%	10s	64%	1m 40s	19m 10s	1m 30s	17s	18m 7s	5	38
Chart Unavailable Select a column in the summary row												
Name	Offer	Answer %	Abandon %	ASA	Service Level %	Avg Wait	Avg Handle	Avg Talk	Avg Hold	Avg ACW	Hold	Transfer
Southern_Gen	-	--	--	-	--	-	-	-	-	-	-	-
Southern_Hmg	-	--	--	-	--	-	-	-	-	-	-	-
Southern_LeadLine	-	--	--	-	--	-	-	-	-	-	-	-
Southern_LTC	-	--	--	-	--	-	-	-	-	-	-	-
Southern_Trans	-	--	--	-	--	-	-	-	-	-	-	-
Southern_OverPayments	-	--	--	-	--	-	-	-	-	-	-	-
WisDHS_Test1	21	5 24%	15 71%	20s	15% 80%	17m 44s	30m 53s	1m 11s	-	35m 32s	-	8
WisDHS_Test1_VM	-	--	--	-	--	-	-	-	-	-	-	-
WisDHS_Test2	4	--	3 75%	-	0% 80%	1m 31m 35s	9m 14s	4m 14s	-	5m 46s	-	1
WisDHS_Test2_VM	-	--	--	-	--	-	-	-	-	-	-	-
WisDHS_Test3	1	1 100%	--	8s	100% 80%	8s	8m 20s	21s	-	7m 49s	-	-
WisDHS_Test3_VM	-	--	--	-	--	-	-	-	-	-	-	-
WisDHS_Training	249	181 73%	59 24%	12s	68% 80%	14s	27m 53s	1m 17s	17s	26m 58s	5	6
WisDHS_Training_OB	-	--	--	-	--	-	1m 21s	57s	-	14s	-	-

6.1.5 Viewing Interaction Details

6.1.5.1 Default Interactions View

(Video instructions available: [Viewing Interaction Details](#))

The Interactions view allows supervisors to display live calls and individual interactions by agents. Select the help button in the bottom left corner of the window for help text specific to this view.

6.1.5.1 Default Interactions View

The default interactions view displays call history for the selected time period and live calls. The information displayed includes call participants, call date and time, duration, call direction, queue, and wrap-up code. Select an interaction for more information. Select a live call to monitor or coach. Select a completed call to access the call recording. For information about filtering, exporting, saving views, and downloading, [SEE SECTION 6.1 SUPERVISOR DESKTOP, SEE SECTION 6.1 INTRODUCTION TO PERFORMANCE. For SEE SECTION 6.2.1 COACHING AND MONITORING AGENTS.](#)

Users	Remote	Date	Conversation D.	Direction	Queue	Wrap-up
		Wed, May 15, 2024 10:25 AM	14s	Outbound	-	-
		Wed, May 15, 2024 10:24 AM	5m 22s	Inbound	HMO_Gen	Default Wrap-up Code
		Wed, May 15, 2024 10:23 AM	17s	Outbound	-	-
		Wed, May 15, 2024 10:23 AM	57s	Inbound	HMO_Gen	Default Wrap-up Code
		Wed, May 15, 2024 10:22 AM	44s	Inbound	HMO_Gen	-
		Wed, May 15, 2024 10:14 AM	39s	Inbound	HMO_SSI	-
		Wed, May 15, 2024 9:24 AM	9s	Inbound	-	-
		Wed, May 15, 2024 9:23 AM	9s	Inbound	-	-
		Wed, May 15, 2024 8:46 AM	9s	Inbound	-	-
		Wed, May 15, 2024 8:45 AM	14s	Inbound	-	-
		Wed, May 15, 2024 8:31 AM	40s	Inbound	HMO_SSI	-
		Wed, May 15, 2024 8:30 AM	24s	Inbound	-	-
		Wed, May 15, 2024 8:30 AM	12s	Inbound	-	-
		Wed, May 15, 2024 8:29 AM	32s	Inbound	HMO_SSI	-
		Wed, May 15, 2024 8:29 AM	3s	Inbound	-	-
		Wed, May 15, 2024 8:28 AM	39s	Inbound	HMO_SSI	-
		Wed, May 15, 2024 8:25 AM	48s	Inbound	HMO_SSI	-
		Wed, May 15, 2024 8:25 AM	21s	Inbound	-	-
		Wed, May 15, 2024 8:24 AM	1m 1s	Inbound	HMO_SSI	-
		Wed, May 15, 2024 8:13 AM	3m 17s	Inbound	CE43_Q1	Default Wrap-up Code
		Wed, May 15, 2024 8:09 AM	2m 18s	Inbound	CE43_Q1	Default Wrap-up Code

6.2 Supervising Agent Calls

[6.2.1 Coaching and Monitoring Agents](#) (Video instructions available: [Coaching and Monitoring Agents](#))

[6.2.1.1 Selecting a Live Call](#)

[6.2.1.2 Coaching a Call](#)

[6.2.1.3 Monitoring a Call](#)

[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](#)

[6.2.5 Activate and Deactivate Agents in a Queue](#)

6.2.1 Coaching and Monitoring Agents

[6.2.1.1 Selecting a Live Call](#)

[6.2.1.2 Coaching a Call](#)

[6.2.1.3 Monitoring a Call](#)

(Video instructions available: [Coaching and Monitoring Agents](#))

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.

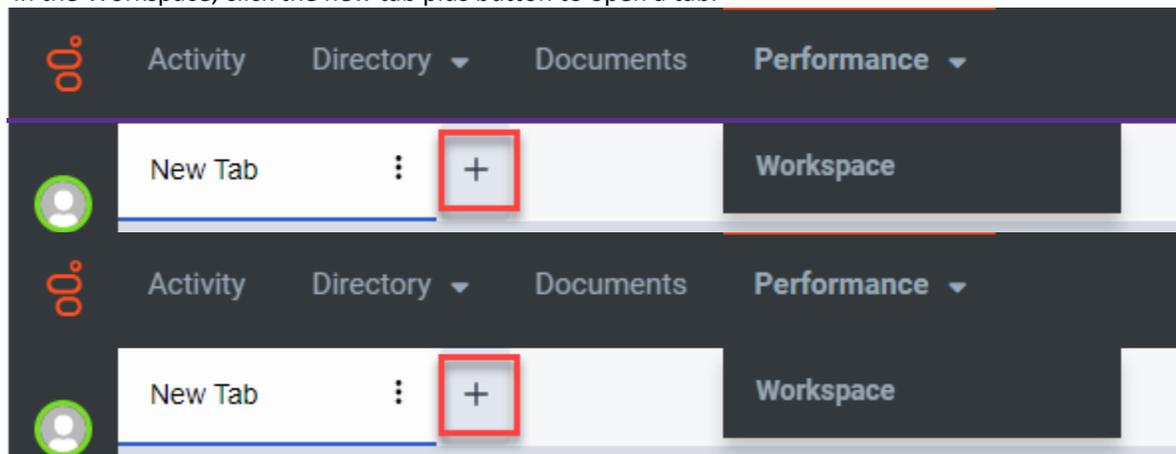
Monitoring is when a supervisor listens to a call and neither the agent nor the caller can hear them. The agent does not receive a notification that they are being monitored.

The Interactions view displays call history and live calls for all agents in your line of business for the selected time period. Calls can be selected from this view and monitored or coached. For information about selecting agents, filtering, exporting, saving views, and [downloading, SEE SECTION 6.1 SUPERVISOR DESKTOP-downloading, SEE SECTION 6.1 INTRODUCTION TO PERFORMANCE](#). Select the help button in the bottom left corner of the window for help text specific to this view.

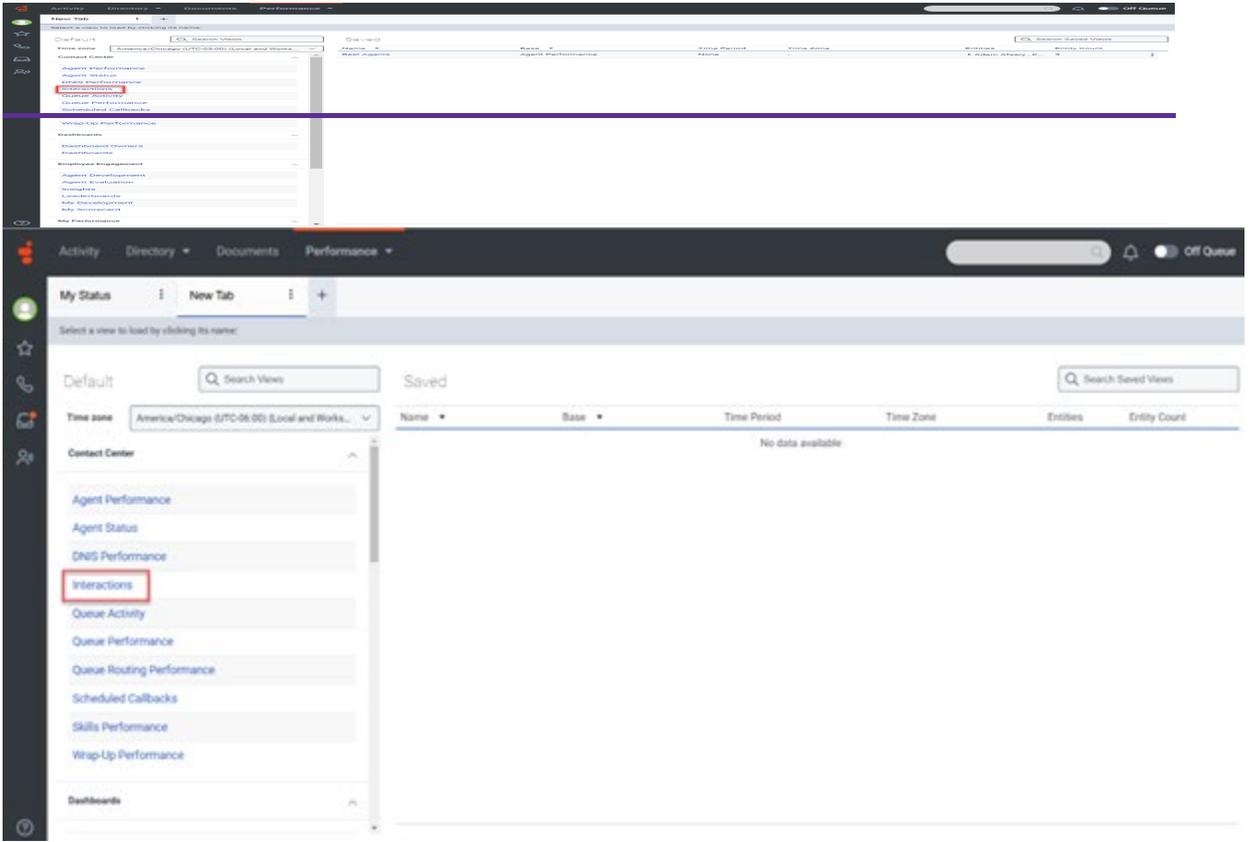
[6.2.1.1](#) Selecting a Live Call

Open an interaction:

1. In the Workspace, click the new tab plus button to open a tab.



2. Select Interactions.



3. Click the filter button to open the filter pane.

4. Scroll down to the Limit Interactions section, and select Interacting to display live calls.

The image displays two side-by-side screenshots of a call center software interface, illustrating the steps to filter for live calls. Both screenshots show a 'FILTERS' panel with a search bar and a list of filter categories. The 'Interactions' category is expanded, showing a 'LIMIT INTERACTIONS' section with several checkboxes. In both screenshots, the 'Interacting' checkbox is selected and highlighted with a red box. A red arrow points downwards from the 'Interacting' checkbox in both panels, indicating the scroll action. The right screenshot shows the 'LIMIT INTERACTIONS' section scrolled down, revealing additional options like 'Match Any' and 'MOS'.

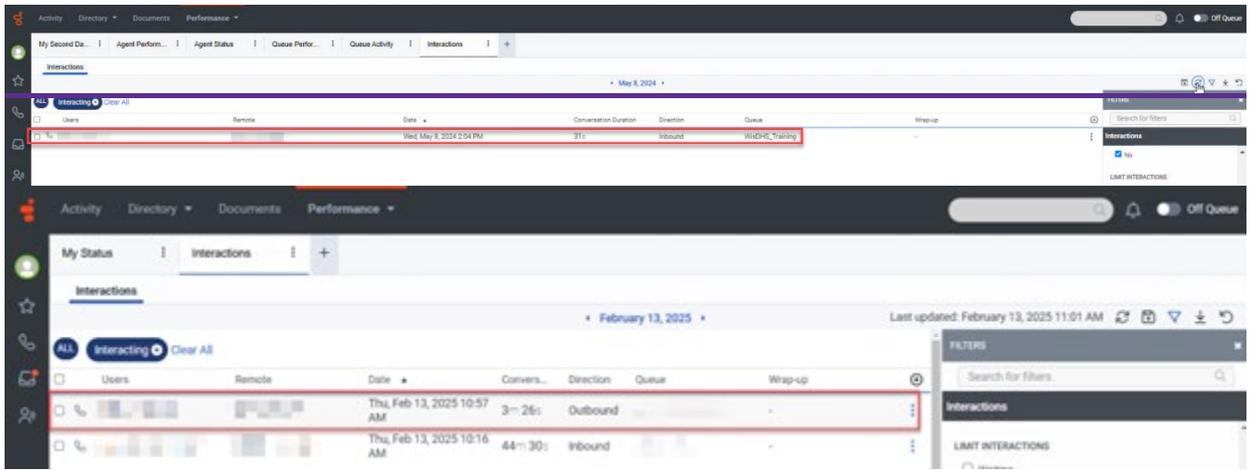
Left Screenshot:

- Search for filters
- Interactions**
- No
- LIMIT INTERACTIONS**
- Waiting
- Interacting**
- ACD-routed
- Preferred Agents Requested
- Screen Share
- Co-browse
- Voicemail
- Monitored
- Flagged
- Wrap-up Notes
- Match Any
- MOS**
- Range: Above Below
- 1 to 5
- Apply Clear
- SIP CALL ID
- Filter by SIP Call ID

Right Screenshot:

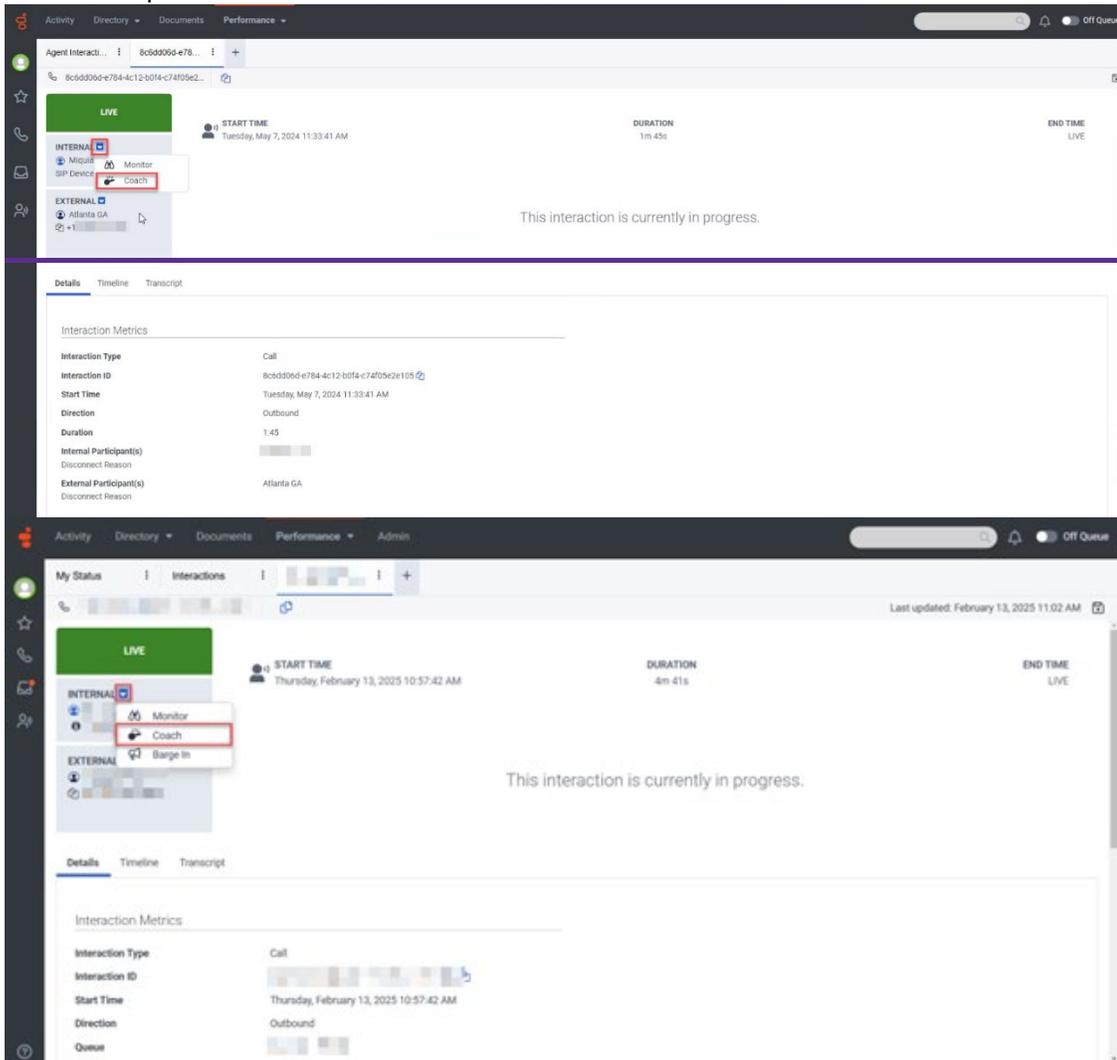
- Search for filters
- Interactions**
- LIMIT INTERACTIONS**
- Waiting
- Interacting**
- ACD-routed
- Preferred Agents Requested
- Screen Share
- Co-browse
- Voicemail
- Monitored
- Flagged
- Wrap-up Notes
- Match Any
- MOS**
- Evaluations**
- Surveys**
- Outbound**
- Journey**
- Flows**
- External Contact**

- Click the live call in the interactions view.

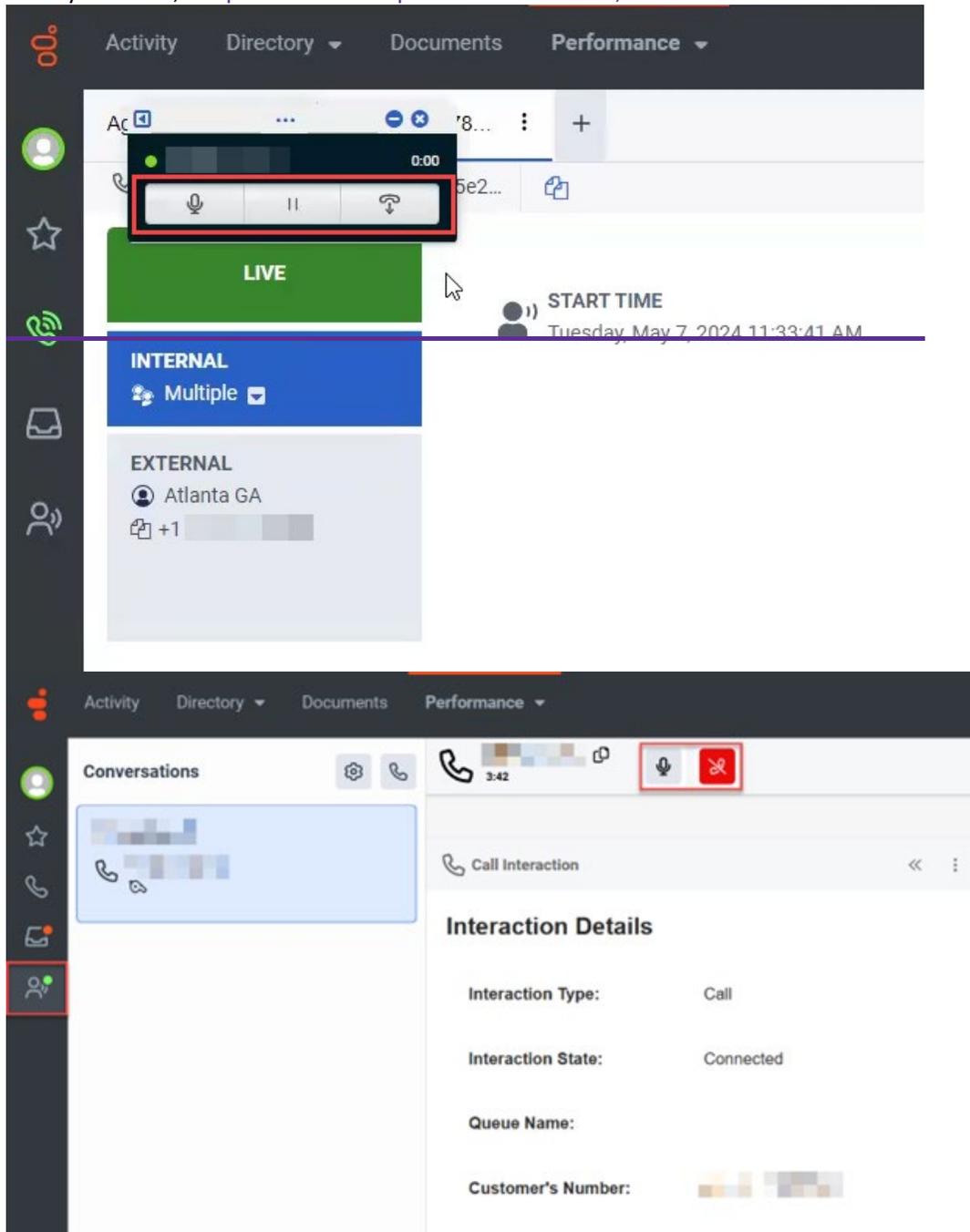


6.2.1.2 Coaching a Call

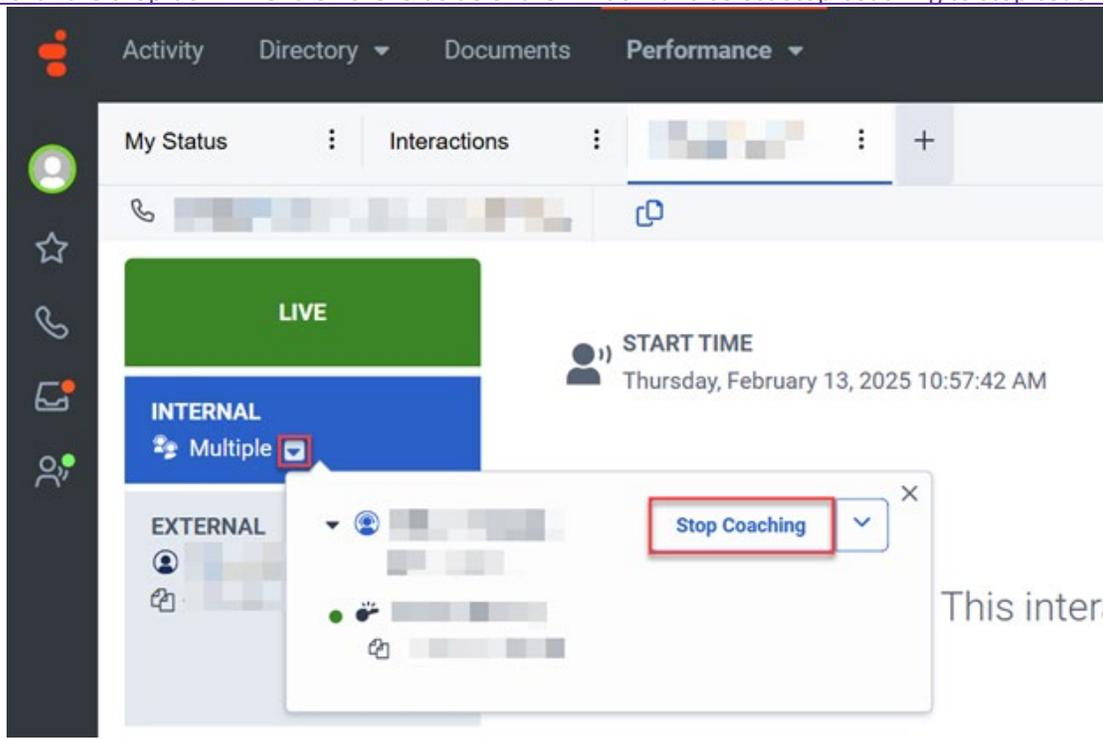
- Click the drop-down menu on the left side of the window and select Coach.



2. Answer your phone to be connected to the call. Do not click the on-screen answer button. The parties on the call will do not know you are listening.
3. Click the Interactions button on the left Communications Sidebar and click the microphone button to mute your voice, the pause button to place the call on hold, or the end call button to end the call.



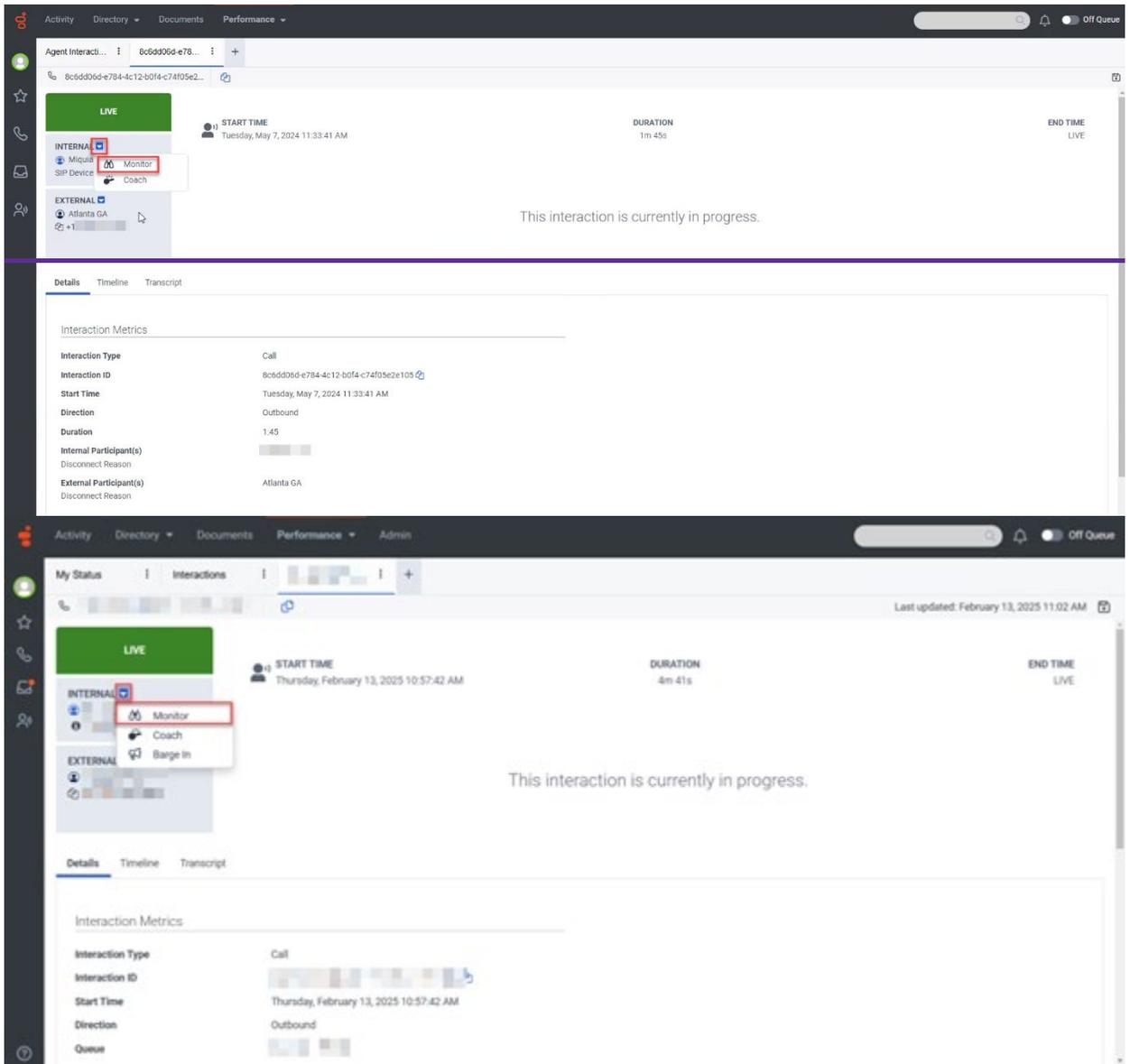
4. Click the drop-down menu on the left side of the window and select Stop Coaching to stop coaching.



6.2.1.3 Monitoring a Call

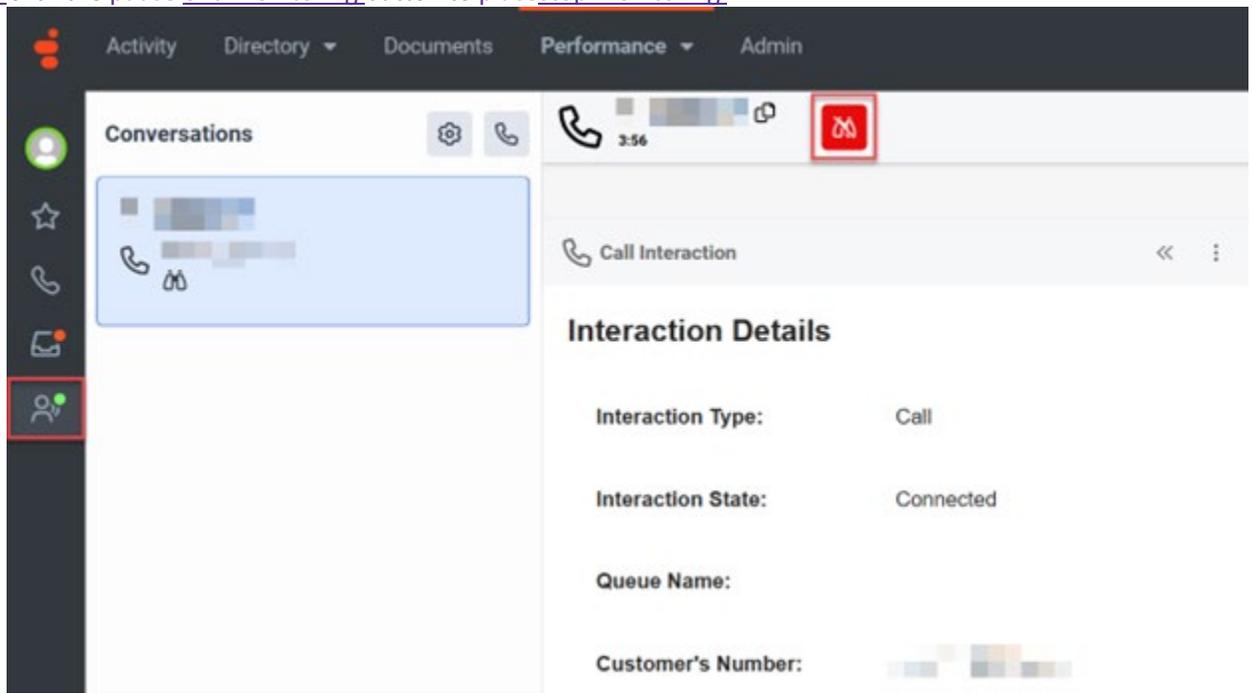
To monitor a call:

1. Click the drop-down menu on the left side of the window and select Monitor.

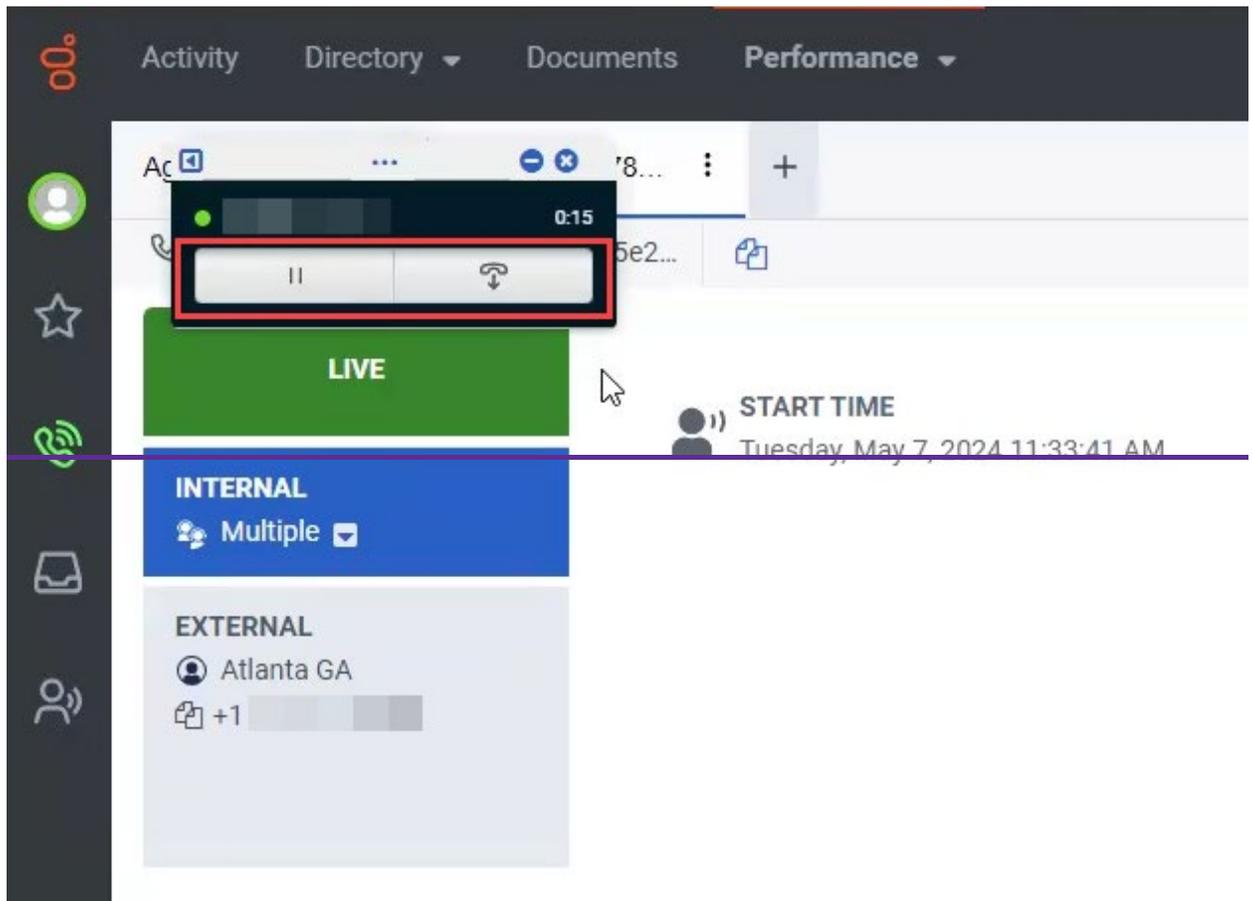


2. Answer your phone to be connected to the call. Do not click the on-screen answer button. The parties on the call will do not know you are listening.

3. Click the pause-end monitoring button to place stop monitoring.



3.4. Or click the call drop-down menu on hold or the end call button on end left side of the call.



window and select Stop Monitoring to stop monitoring.

The screenshot displays a software interface with a dark top navigation bar containing 'Activity', 'Directory', 'Documents', 'Performance', and 'Admin'. Below this is a secondary bar with 'My Status', 'Interactions', and a '+' icon. A vertical sidebar on the left contains icons for profile, star, call, document, and a green status icon. The main content area features a green 'LIVE' banner, a blue 'INTERNAL Multiple' section with a dropdown arrow, and a grey 'EXTERNAL' section. A 'START TIME' label indicates 'Thursday, February 13, 2025 10:57:42 AM'. A context menu is open over the 'INTERNAL Multiple' section, listing several items with a 'Stop Monitoring' button highlighted in a red box. The text 'This in:' is partially visible on the right side of the image.

6.2.2 Selecting a Call to Review

[6.2.2.1 Selecting a Call to Review](#)

[6.2.2.2 Downloading a Recorded Call](#)

(Video instructions available: [Selecting a Call to Review](#))

All internal and external calls are recorded, and supervisors can review these recordings.

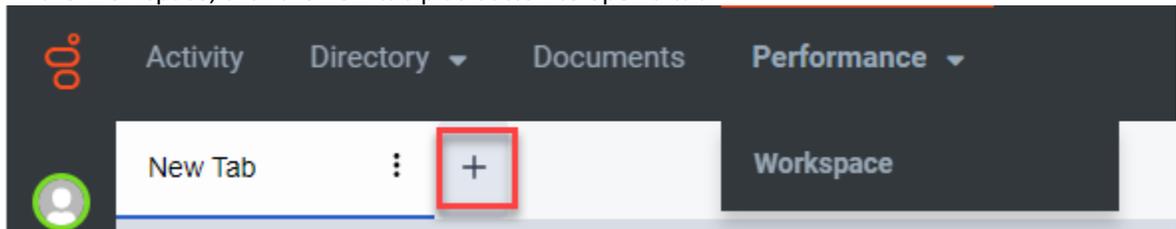
The Supervisor must be logged on to Workspace and is assigned as a supervisor for the specific agent or agent group. Select the help button in the bottom left corner of the window for help text specific to this view.

[6.2.2.1 Selecting a Call to Review](#)

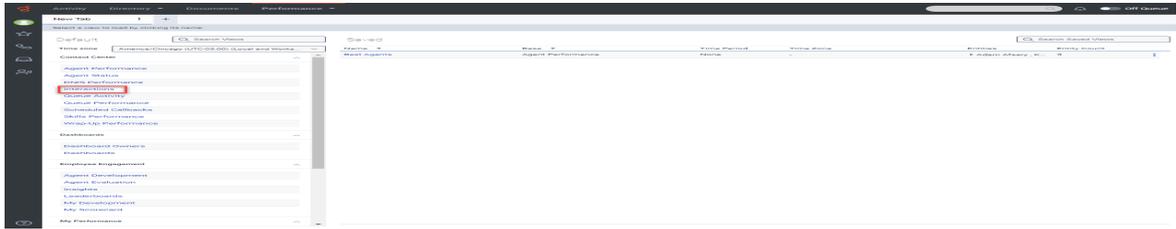
The default interactions view displays call history for the selected time period and any live calls. The information displayed includes call participants, call date and time, duration, call direction, queue, and wrap-up code. For additional information filtering, exporting, saving views, and [downloading](#), [SEE SECTION 6-1 SUPERVISOR DESKTOP-downloading, SEE SECTION 6.1 INTRODUCTION TO PERFORMANCE.](#)

Open an interaction:

1. In the Workspace, click the new tab plus button to open a tab.



2. Select Interactions.



3. Click the filter button, scroll down, and select Show only interactions that were recorded.

The screenshot displays a CRM interface with a table of interactions and a filter sidebar. The table has columns for Users, Remote, Date, Conversation, Direction, Queue, and Wrap-up. The filter sidebar on the right includes sections for Interactions, AGENT ASSIST, EXTERNAL TAG, AUTHENTICATED, RECORDED, DELIVERY STATUS, Evaluations, Surveys, Outbound, Journey, Flows, and External Contact. The 'RECORDED' section has a checkbox labeled 'Show only interactions that were recorded' which is checked and highlighted with a red box. A red arrow points from the filter button in the top right corner to this checkbox.

Users	Remote	Date	Conversation	Direction	Queue	Wrap-up
		Thu, May 9, 2024 11:00 AM	55s	Inbound	ACDSystems	-
		Thu, May 9, 2024 9:40 AM	6s	Inbound	-	-
		Thu, May 9, 2024 9:38 AM	1m 15s	Inbound	ACDSystems	-
		Thu, May 9, 2024 9:37 AM	0.183s	Inbound	-	-
		Thu, May 9, 2024 8:55 AM	35s	Inbound	EMCAPO_WWMA_Gen	-
		Thu, May 9, 2024 8:34 AM	30s	Inbound	EMCAPO_DOC	-
		Thu, May 9, 2024 8:33 AM	1m 1s	Inbound	EMCAPO_DOC	-
		Thu, May 9, 2024 8:15 AM	23s	Inbound	-	-
		Thu, May 9, 2024 8:14 AM	24s	Inbound	-	-
		Thu, May 9, 2024 8:12 AM	1m 25s	Inbound	Tim	Default Wrap-up Code
		Thu, May 9, 2024 8:10 AM	59s	Inbound	WFCAP_Gen	Default Wrap-up Code
		Thu, May 9, 2024 8:06 AM	4m 35s	Inbound	EstRec_Gen	Default Wrap-up Code
		Thu, May 9, 2024 8:04 AM	1m 29s	Inbound	ACDSystems	Default Wrap-up Code

4. Use the playback controls to listen to the recording.

The screenshot displays a call recording interface. At the top, there are navigation tabs: Activity, Directory, Documents, and Performance. The main header shows the call ID: fac89bc6-845a-42d0-82ec-641f368a... and a search bar with 'Off Queue' on the right. Below the header, the recording details are shown: RECORDING START TIME (Thu, May 9, 2024 8:15:07 AM), PROGRESS (0m 00s / 0m 22s), and RECORDING END TIME (Thu, May 9, 2024 8:15:30 AM). A waveform visualization of the call recording is displayed in the center. To the right of the waveform, there are playback controls: a play button, a volume icon, and a mute icon, all enclosed in a red box. Below the waveform, there is an 'Add Annotation' button. The interface is divided into two main sections: 'Interaction Metrics' and 'Recording Information'. The 'Interaction Metrics' section includes fields for Interaction Type (Call), Interaction ID (fac89bc6-845a-42d0-82ec-641f368aabde), Start Time (Thursday, May 9, 2024 8:15:07 AM), End Time (Thursday, May 9, 2024 8:15:30 AM), Direction (Inbound), Duration (0:23), Internal Participant(s) (Cell Phone WI), and External Participant(s) (Cell Phone WI). The 'Recording Information' section includes fields for Call Recording 1 - Segment 1, Archive Date (None), Delete Date (None), Exported Date (None), Protected (No), and a Download button. The bottom section is labeled 'Participant Data' and shows 'Cell Phone WI'.

6.2.2.2 Downloading a Recorded Call

Calls can be downloaded to your computer. By default, they are saved to your downloads folder.

To download a recorded call:

1. Click Download on the recording.

The screenshot displays a call recording interface. At the top, there are navigation tabs: Activity, Directory, Documents, and Performance. Below these, the 'Interactions' tab is active, showing a call ID: cc196000-bf72-48db-b99c-41afcd54... The main area features a waveform representing the recording, with a play button and volume controls on the right. The recording start time is 'Wed, May 15, 2024 11:55:59 AM' and the end time is 'Wed, May 15, 2024 11:56:20 AM'. Below the waveform, there are tabs for 'Details', 'Timeline', and 'Transcript'. The 'Details' tab is selected, showing two sections: 'Interaction Metrics' and 'Recording Information'. The 'Recording Information' section includes a 'Download' button, which is highlighted with a red box. Other fields in this section include 'Archive Date', 'Delete Date', 'Exported Date', and 'Protected: No'. The 'Interaction Metrics' section lists details such as 'Interaction Type: Call', 'Interaction ID', 'Start Time', 'End Time', 'Direction', 'Queue', 'Duration', and 'Internal Participant(s)'. The 'Wrap-up Information' section at the bottom shows 'Name: Guru Mandrachalam' and 'Code: -'.

Interaction Metrics		Recording Information	
Interaction Type	Call	Call Recording 1 - Segment 1	(Edit)
Interaction ID	cc196000-bf72-48db-b99c-41afcd543303	Archive Date	None
Start Time	Wednesday, May 15, 2024 11:55:59 AM	Delete Date	None
End Time	Wednesday, May 15, 2024 11:59:45 AM	Exported Date	None
Direction	Inbound	Protected:	No
Queue	HMO_Hmg	Download	
Duration	3:45		
Internal Participant(s)			
Disconnect Reason			
External Participant(s)			
Disconnect Reason			
Wrap-up Information			
Name	Guru Mandrachalam		
Code	-		

2. Optionally select a format for the recording and click the download button. Note: Downloaded recordings are not saved to your Genesys inbox.

The screenshot displays the Genesys Performance console interface. The top navigation bar includes 'Activity', 'Directory', 'Documents', and 'Performance'. The main content area is divided into two columns: 'Interaction Metrics' and 'Recording Information'. The 'Interaction Metrics' section shows details for a call, including the interaction ID, start and end times, direction, queue, and duration. The 'Recording Information' section shows details for a call recording segment, including the file name and a 'Download' button. A dropdown menu is open next to the 'Download' button, showing options for file format: Opus, Mp3, Wav, and Webm. The 'Download' button and the dropdown menu are highlighted with red boxes.

Interaction Metrics	
Interaction Type	Call
Interaction ID	cc196000-bf72-48db-b99c-41afcd543303
Start Time	Wednesday, May 15, 2024 11:55:59 AM
End Time	Wednesday, May 15, 2024 11:59:45 AM
Direction	Inbound
Queue	HMO_Hmg
Duration	3:45
Internal Participant(s)	
Disconnect Reason	
External Participant(s)	
Disconnect Reason	

Recording Information	
Call Recording 1 - Segment 1	(Edit)
Archive Date	None
Delete Date	None
Exported Date	None
Protected:	No
File Name:	Call1-cc196000-bf72-48db-b99c-41afcd543303
File Format:	Opus

Download Cancel

- Opus
- Mp3
- Wav
- Webm

6.2.5 Activate and Deactivate Agents in A Queue

Administrators and supervisors can activate and deactivate agents in a queue. This functionality exists in the [Performance>Workspace>Queue Activity](#) view.

[Active/Activate Agent](#): An agent who is currently assigned to the queue and is available to receive and handle calls from that queue.

[Inactive/Deactivate Agent](#): An agent who is currently assigned to the queue but is not available to receive or handle calls from that queue.

Note [Agents who are going to be activated or deactivated by a supervisor must be assigned to the queue first by a local administrator.](#)

1. From the Queue Activity view, click on the queue you'd like to activate/deactivate agents.

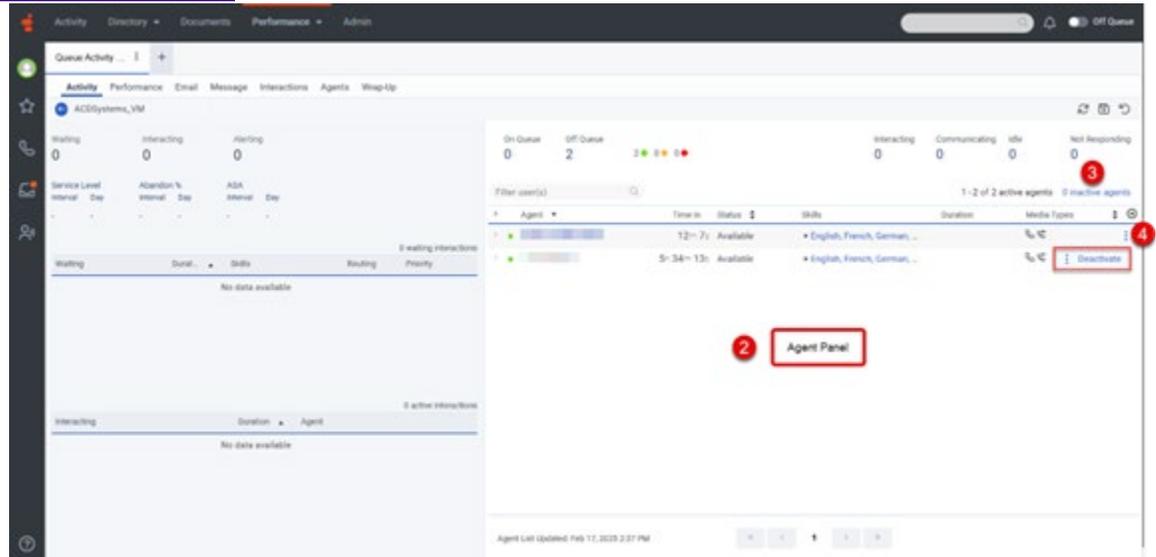
Name	Waiting	Interactions
<input type="checkbox"/> ACDSYSTEMS	0	0
<input type="checkbox"/> ACDSYSTEMS_VM	0	0

2. The Agent Panel defaults to show the list of agents currently active in the queue.
3. To view inactive agents, click the inactive agents link on the top right of the agent panel.

4. Deactivate an agent:

a. Click on the three-dot menu to the right of the agent's information in the active agent list.

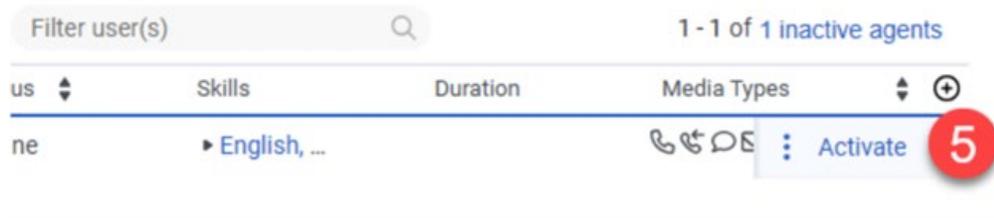
b. Click on deactivate.



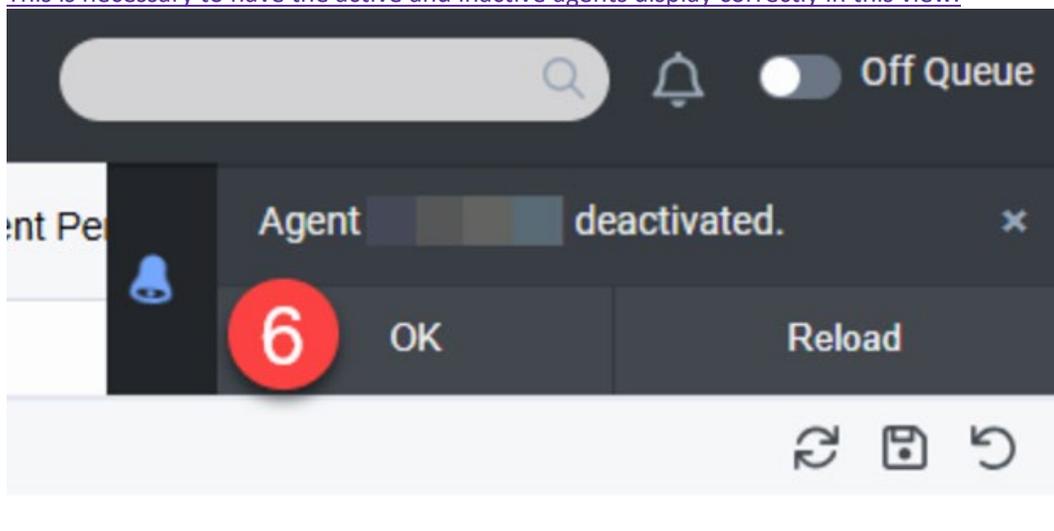
5. Activate an agent:

a. Click on the three-dot menu to the right of the agent's information in the inactive agent list.

b. Click on activate.



6. In both circumstances there is a notification in the top right asking if you'd like to reload the view. This is necessary to have the active and inactive agents display correctly in this view.



7.3 Setting Business Events - Special Messages

Special messages play for callers and then continue with the normal call flow. For example, callers might be informed that wait times are longer than normal due to increased call volume. Special messages are not provided by default. Local administrators must open a ticket with the Wisconsin Help Desk to request special messages. See Section [11.6.1 Submitting a Genesys Support Ticket](#). Special messages apply to the local admin's call center.

7.8 Disable and Enable Callback

7.8.1 Disable Callback

7.8.2 Enable Callback

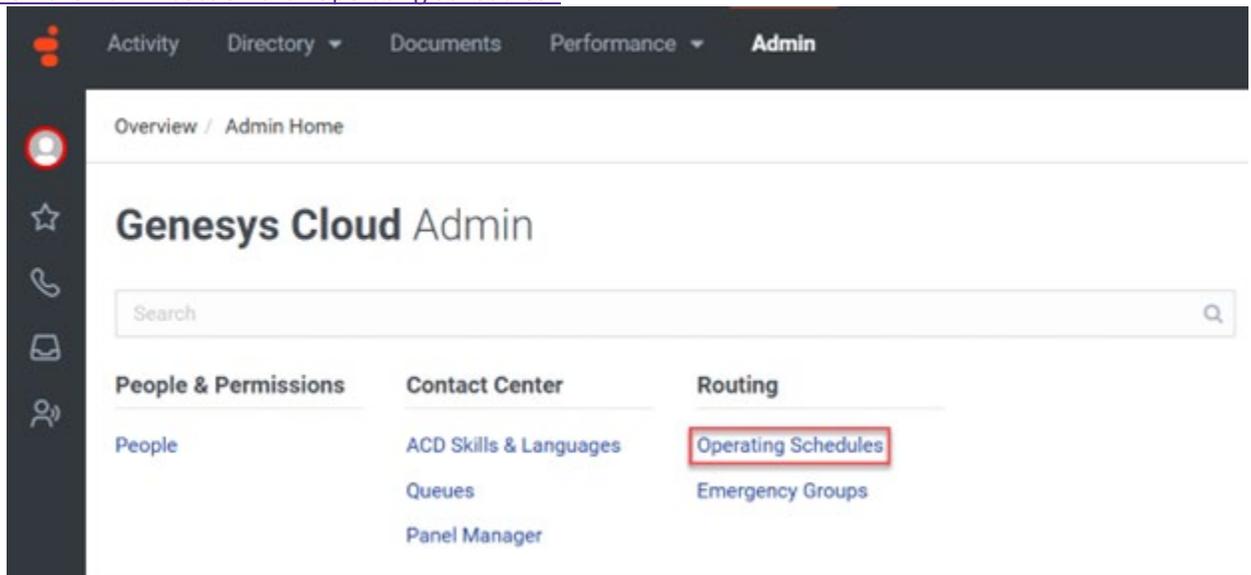
Local administrators may temporarily disable callback for their line of business. This functionality is located in the Admin>Operating Schedules view. When callback is disabled, calls entering the call flow are not offered callback in any of the queues. Calls already in the call flow may still be offered callback.

Note It is very important that the CallbackClosed 24X7 is added to the correct schedule group. Adding this schedule to the incorrect schedule group results in unintended outcomes, including closing the call center and clearing live calls in queue.

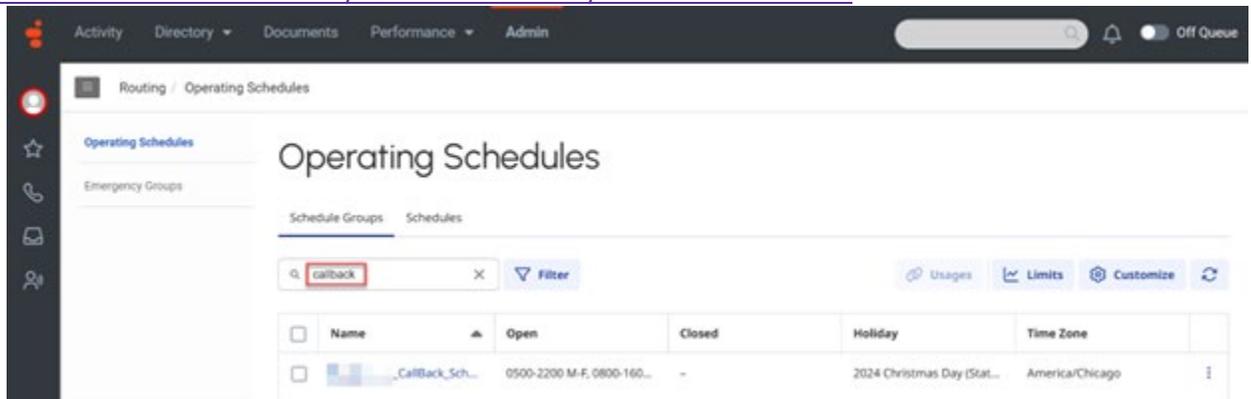
If callback is disabled for the remainder of the day, Income Maintenance (IM) agencies must email Jonelle Brom at Jonelle.brom@dhs.wisconsin.gov and dhsgenesysproject@dhs.wisconsin.gov indicating that your line of business has disabled callback and the reason why it was disabled.

7.8.1 Disable Callback

1. On the Admin section click Operating Schedules.



2. Enter Callback in the Search by name box to filter by the desired schedule.



3. Select the Callback schedule group for your line of business.

Routing / Operating Schedules

Operating Schedules

Schedule Groups Schedules

callback Filter Usages Limits Customize

<input type="checkbox"/>	Name	Open	Closed	Holiday	Time Zone
<input type="checkbox"/>	_CallBack_Sch...	0500-2200 M-F, 0600-1600...	-	2024 Christmas Day (Stat...	America/Chicago

4. On the Callback Schedule Group page, click the Schedules tab.

Routing / Operating Schedules

Schedule Group

The time in America/Chicago is 2:36 PM. This schedule group is currently open.

Overview Schedules Calendar

Open Schedules Closed Schedules Holiday Schedules

Add existing schedules Add existing schedules Add existing schedules

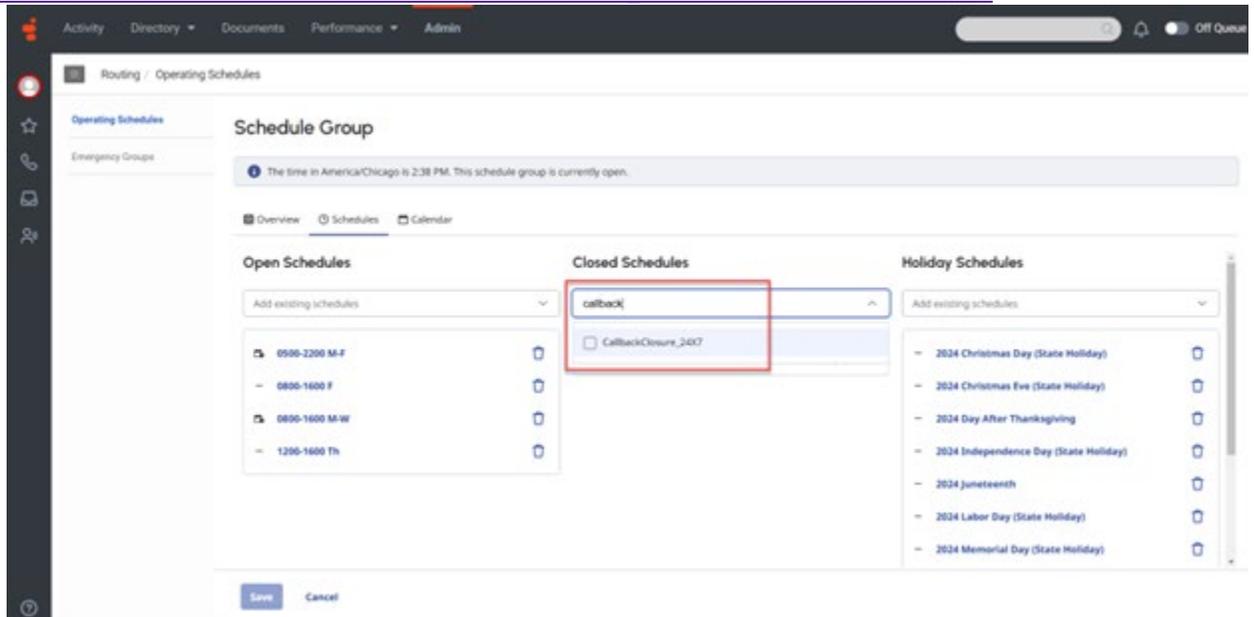
0500-2200 M-F
- 0600-1600 F
0600-1600 M-W
- 1200-1600 Th

No closed schedules are assigned

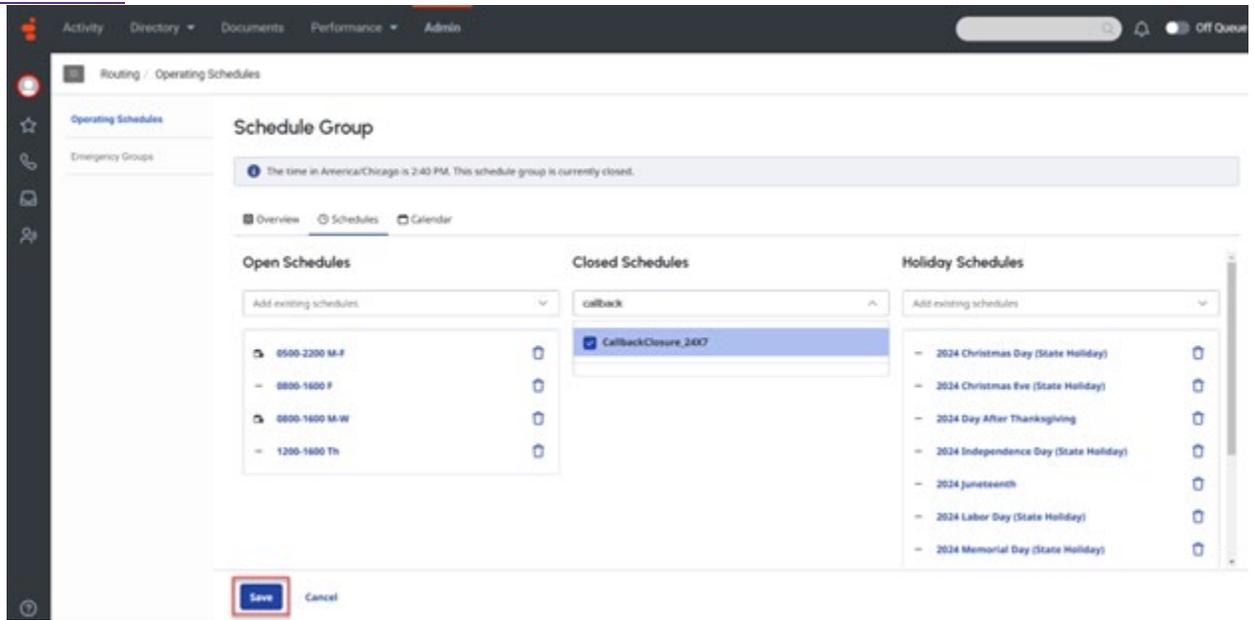
- 2024 Christmas Day (State Holiday)
- 2024 Christmas Eve (State Holiday)
- 2024 Day After Thanksgiving
- 2024 Independence Day (State Holiday)
- 2024 Juneteenth
- 2024 Labor Day (State Holiday)
- 2024 Memorial Day (State Holiday)

Save Cancel

5. In the Closed Schedules section search CallbackClosure 24X7 and select that schedule.



6. Click Save.



7. If Callback is disabled for the remainder of the day, Income Maintenance (IM) agencies must email [Jonelle Brom](mailto:Jonelle.brom@dhs.wisconsin.gov) at Jonelle.brom@dhs.wisconsin.gov and dhsgenesysproject@dhs.wisconsin.gov indicating that your line of business has disabled callback and the reason for doing so.

7.8.2 Enable Callback

When the call center is ready to begin offering callback again, local administrators must enable callback.

1. Repeat steps 1-4 above to navigate to the appropriate schedule group.
2. Click on the Delete button next to the 24X7 closed schedule added previously.

3. Click Save.

Activity Directory Documents Performance Admin

Routing / Operating Schedules

Operating Schedules

Emergency Groups

Schedule Group

The time in America/Chicago is 2:43 PM. This schedule group is currently closed.

Overview Schedules Calendar

Open Schedules

Add existing schedules

- 0500-2200 M-F
- 0800-1600 F
- 0800-1600 M-W
- 1200-1600 Th

Closed Schedules

Add existing schedules

- CallbackClosure_24X7

Holiday Schedules

Add existing schedules

- 2024 Christmas Day (State Holiday)
- 2024 Christmas Eve (State Holiday)
- 2024 Day After Thanksgiving
- 2024 Independence Day (State Holiday)
- 2024 Juneteenth
- 2024 Labor Day (State Holiday)
- 2024 Memorial Day (State Holiday)

Save Cancel

10 Reserved Change Requests

10.1 Change Requests

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

- User add, edit, or deletes (for a copy of the User Request form email the Genesys Cloud Support Team at: dhsgenesyscloudproject@dhs.wisconsin.gov)
- Temporary change in hours of operation
- Business event requests
- Call flow change requests

For instructions on how to open a ticket for these change requests, see SECTION 11.1.2 OPENING A TICKET.

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:
 - a. 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
 - b. All others should use the links on the Systems 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, 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.

11.1.1 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~~

11.1.2 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 email
- Genesys phone the agent is logged into
- Connection ID (for calls)
- ~~Screenshots~~
- [Screenshots \(If including a screenshot with your ticket, use the Snipping Tool available in the Windows operating system. This method is preferred over Ctrl+Alt+PrtScn.\)](#)
- 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](#)

Send



To helpdesk.wi.gov

Cc

Bcc

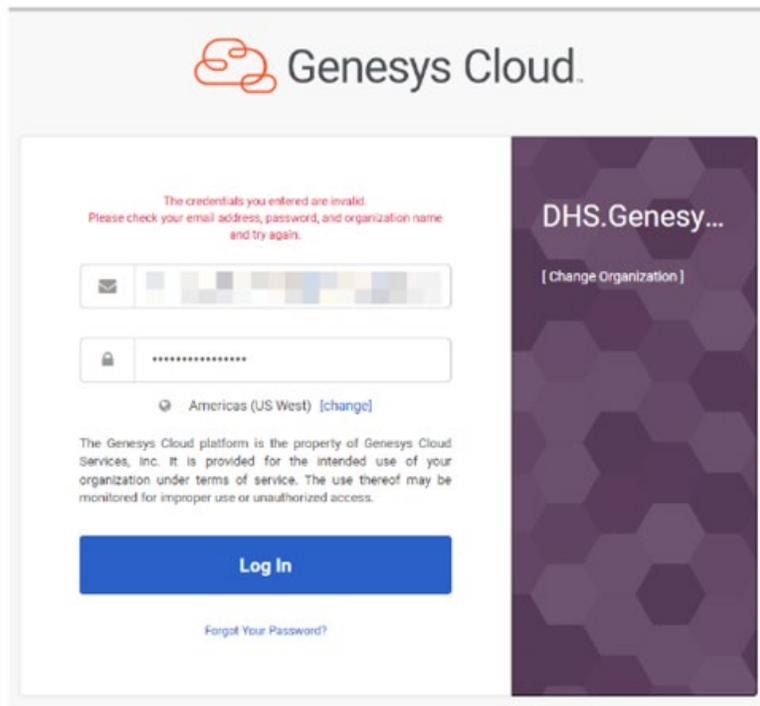
Cannot log into Genesys Cloud Agent Desktop

Draft saved at 1:53 PM

PLEASE ASSIGN TO DHS GENESYS CLOUD SUPPORT TEAM

Hi,

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



Send [dropdown] [lock icon] [dropdown]

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



The credentials you entered are invalid.
Please check your email address, password, and organization name and try again.

Americas (US West) [change]

Log In

[Forgot Your Password?](#)

DHS.Genesys...

[Change Organization]

Thanks,

[Redacted signature]

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