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

To:Genesys User Guide UsersFrom:Autumn Arnold, Bureau Director
Bureau of Eligibility and Enrollment PolicyRe:Genesys User Guide Release 25-01Release Date:04/09/2025Effective 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 U	PDATES		
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 o Remove Them From the Call	Updated image to support user interface update.
4.7	Consult	Updated image to support user interface update.
4.71	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.

Contents

2.4 Select or Change Phone	6
3.1 Agent Desktop Content Viewer	9
3.1.1 Communications Sidebar and Main Menu	9
3.1.2 Directory	10
3.1.3 Communications Sidebar	13
3.2 Performance	19
3.2.5 Exporting, Scheduling, and Expiring Reports	26
4.1.1 Go On Queue	27
4.1.1.1 Notification of Call	28
4.1.1.2 Ending a Call	29
4.1.2 Agent Training Call Flow	33
4.1.2.1 Receiving a Practice Call From the Queue	33
4.2 Making an Internal Call (Genesys User to Genesys User)	40
4.2.1 Ending an Internal Call	42
4.3 Making an External Call	44
4.3.1 Ending a Call	46
4.4 Placing a Call on Hold	48
4.5 Transferring a Call	49
4.5.2 Transferring a Call to a Genesys Agent	50
4.6 Conference	53
4.6.1 Start a Conference	54
4.6.2 Place a Conferenced Party On Hold or Remove Them From the Call	55
4.7 Consult	56
4.7.1 Place a Party On Hold or Remove Them From the Call	57
4.7.2 Transfer the Second Party to the Third Party	58
4.7.3 Bring All Parties Together in a Conference Call	59
4.8 Expanding the Interactions Pane	60
6 Supervisors	63
6.1 Introduction to Performance	64
Open a View	67
Add or Remove Columns	68
Isolate Selected Items	69
Save, Filter, or Export a View	71
Save and Open a View	71
Filter a View	73

Reset a View	75
6.1.1 Viewing Agent Performance Statistics	76
6.1.1.1 Default Agent Performance View	76
6.1.2 Viewing Agent Status	78
6.1.2.1 Agent Status View	78
6.1.2.3 Add Secondary and Routing Status to the Agent Status View	82
6.1.3 Viewing Queue Activity	84
6.1.3.1 Default Queue Activity View	84
6.1.4 Viewing Queue Performance	85
6.1.4.1 Default Queue Performance View	85
6.1.5 Viewing Interaction Details	86
6.1.5.1 Default Interactions View	86
6.2 Supervising Agent Calls	87
6.2.1 Coaching and Monitoring Agents	88
6.2.1.1 Selecting a Live Call	88
6.2.1.2 Coaching a Call	91
6.2.1.3 Monitoring a Call	93
6.2.2 Selecting a Call to Review	97
6.2.2.1 Selecting a Call to Review	97
6.2.2.2 Downloading a Recorded Call	99
6.2.5 Activate and Deactivate Agents in A Queue	102
7.3 Setting Business Events - Special Messages	104
7.8 Disable and Enable Callback	105
7.8.1 Disable Callback	105
7.8.2 Enable Callback	107
10 Change Requests	109
10.1 Change Requests	109
11 Troubleshooting	110
11.1.1 Who Should Submit a Ticket?	111
11.1.2 Opening a Ticket	112

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.

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☆	Busy >	DH No loo	S.Genesys ation available.
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6	Meeting	66 What's on your mind	?
දි	Training	% No phone selected	Select Phone >
	Out of Office >	Preferences	$(\rightarrow Logout$

•	Activity	Directory		Performance 👻	
20 Kg X 10	 Available 1m 41s Busy Away Break Meal Meeting Training 	3	66 What's on % No phone set	Emergency Addr Primary numb your mind?	ess 2 3 er not found.
	Out of Offic	ce >	Preference	es	[→ Logout

3. <u>Select your defaultSelecting a phone or enter your:</u>

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



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

	Activity Directory	v ▼ Documents Performance ▼
○☆	 Available 5m 49s Busy Away D 	Select Phone 🔍
<mark>්</mark> ය බ	 Break Meal Meeting Training Out of Office > 	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 <u>Cloud</u>. Select the help button in the bottom left corner of the window for help text specific to this view.

<u>3.1.1</u> 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 O or the hide button O at the top right corner of a pane.

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〇 公	 View Public Profile 		3	
S		Available		
		What's on your mind?	99	
දී		-		
		+ Add new section		
		Contact Information	Edit	
		Main Email	-	
		Emergency Address		
0				

	Directory •	formance 👻	C Off Queue
C & 2 3 3	View Public Profile		a li
		and China C	
0		66 What's on your mind? 97	
B		Contact Information Edit	
		Emergency Address ▲ Primary number not found.	

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.

00°	Activity	Directory 🔻	Documents	Performance 🔻
		My Organization External Contac	ı ts	
☆	Acti			
S				
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Directory -My Organization Departm 9 0 . . **External Contacts** BOM, DM 1 Systems ☆ … -Title \Box Project Manager 1 റ്റു \$... \$... \$... 12 \$... ?

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 contacts.

00	Activity Directory	v ▼ Documents	Performance 🔻		Q	
	External Co My Organ	nization				
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Ø G	organizations + Add ~ Q	Search External Contacts a	and Organizations			
Ŷ	Contacts	Organizations				
	Name		▼ Title	Organization	Email Phone	
					S &	
	1 - 2 of 2 25 ~	per page		« < Page	1 of 1 > >>	

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

8	Activity Directory			 Off Que
•	Departer Extern	nization	All I People Is Groups 9 Locations	
\$	BOM, DAR	() ()	n sou ouis duis	-
	Title Project Manager	0	Project Manager Available	
20		(9	会

_You can create external contacts for people who do not have Genesys <u>Cloud</u> IDs. Click the phone button to the right of an external contact to call them. Click their name to view interactions and add notes.

S Activity Directory - Documents				 Off Queue
External Contacts and Organizations				
External Contacts and Organ Comprehensive repository of data about your ext	iZations email contacts and organizations. Here you can search	, create and edit contacts and organizations		
Contacts Organizations				
Name	•	Title	Organization	Email Phone
Rolightion, R		Cenergy		
Person, Test User		Lead		6
1 - 2 of 2 25 v per page			a c Page 1	et p
Note All external contac	ts created are visible to	the entire organization		

	Activity Directory - Docum	vents Performance -					Φ 🧿	Off Queue
•	External C My Organization External Contacts							
\$ \$	External Contacts and Comprehensive repository of data ab	Organizations out your external contacts an	d organizations.	Here you can search	, create and edit conta	ects and organizations		
G.	+ Add ~ Q. Search External	Contacts and Organizations						
21	Contacts Organiza	itions						
	Name			Title	2 P.	Organization	Ema	il Phone
	and the second s			Sec. 1				8
	STREET & ST.			10			6	2 %
Ø	1 - 2 of 2 25 v per page					4. C	Page 1 of 1	X 8

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.

00	Activity Director	y 	Performance 👻
	Available 3h 26m 37s		
☆	Busy >		DHS Genesys No location available.
S	Break		Emergency Address 🖉 💿 🛆 Primary number not found.
Ø	Meal Meeting	66 What's on yo	our mind?
୧୦	Training	C	~
	Out of Office >	Preferences	[→ Logout

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

	Favorites		2	<u>.</u>		G
☆	Add a favo	rite				
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	Activity	Directory 👻	Documents	Performance	÷	
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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 Performance3.2.2 My Status3.2.3 My Interactions3.2.4 My Queues Activity3.2.5 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.

00	Activity	Directory	•	Documents	Performance 👻
0	• View	Public Profile			Workspace
☆					
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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.

Performance St.	atuses Evalutions	interactions Sc)	Aute ScoXed	Development				
0	E		+ No	rember 6, 2024	Last u	pdated: Novembe	r 7, 2024 9:37 P	M 2 1 7 ±
	Answer	Handle	Avg Handle	Avg Talk	Avg Hold	Avg ACW	Hold	Transfer
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8								
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8:00 AM		2	-		2			-
8:30 AM								-
9:00 AM				1	-			
9:30 AM				3	-		2	
10:00 AM	1.0			13	-	5		
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11:00 AM				2	-			+
11:30 AM	1.0		- 10 C	. a	+	- e.	- 24	
12:00 PM				1.4	-		1.2	
12:30 PM	34.5	- 22	- X.	24	×.	1	- 12	22
1.00 PM	1.0			8	- V	13		*
1:30 PM	14 C	1	4~ 46s	4m 15s	2	166	1.1	1
2:00 PM								
2:30 PM								
2.00.044								

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.

Select a view to load by clici	ting its name						
Default	Q, Search Views		Saved			Q, Search Saved	Vevs
Time zone America/	Chicago (UTIC-06-00) (Local and Wo	na. v	Name •	Base .	Time _ Time 2one	Entities	Entity _
Insights		^			No data available		
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My Development							
My Scorecard							
My Performance		~					
My Development							
My Evaluations	1						
My Interactions							
My Performance							
My Queues Activity		- 1					
My Schedule		- 1					
My scorecard	1	- 1					
My oceans							
Other		^					
		- 1					

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

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4.00 PM	1.4		43)	3+					
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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.

My Performance 1	My Status I	My Interactions	, and descent state						
Performance Statu	oes Evaluations Intera	ections Schedule	Scorecard Develop	ment					
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-									
8									
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E 30 AM	Arouer -	Handle -	Aug Handle	Aug Talk	Aug Hold	Arg ACW	Hold	Transfer	
E 30 AM	Arower - -	Handle -	Ang Handle -	Ang Talk -	Avg Hold - -	Arg ACW -	Hotel -	Transfer - -	
Interval • E 30 AM 9 00 AM 9 20 AM	Arone: - -	Handle - -	Ang Handle - -	Ang Taik - -	dug Hold - -	Ang ACN -	Hold - -	Transfer - -	
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Interval • 8.30 AM • 9.30 AM • 9.30 AM • 9.30 AM • 10.00 AM • 11.00 AM • 12.00 PM • 12.00 PM • 13.00 PM • 13.00 PM •	Aroser 	Hande	Aug Handle	Ang taik - - - - - - - - - - - - -	Jung Hond 	Ang ACW	Hold - - - - - - - - - - - - -	Transfer 	

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.

				 ▲ A 	pril 20	24 🔸								
PRESETS	4		Ap	oril 20	24		•	•		M	ay 202	24		,
Yesterday	Sun	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Mon	Tue	Wed	Thu	Fri	Sat
This week Last week		1	2	3	4	5	6				1	2	3	4
Previous 7 days This month	7	8	9	10	11	12	13	5	6	7	8	9	10	11
This month by week Last month	14	15	16	17	18	19	20	12	13	14	15	16	17	18
Previous 30 days Previous 3 months	21	22	23	24	25	26	27	19	20	21	22	23	24	25
Day Week	28	29	30					26	27	28	29	30	31	
Month			~	~						~	~			
Month by Week			12	00	AM					12	00	AM		
Time zone			~	~						~	~			
America/Chicago (U 🗸						STAF	RT	END	1 10 0		0.00			2

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

FILTERS Search for filters Interactions MEDIA TYPE Search Type QUEUE Search for queues Skills Search for skills LANGUAGES Search for languages QUECTION	¥,
Search for filters Interactions MEDIA TYPE Search TYPE Search for queues Search for queues Skills Search for skills LANGUAGES Search for languages QUECTION	
Interactions MEDIA TYPE Conversion QUEUE Search for queues SKILLS Search for skills LANGUAGES Search for languages DIRECTION	Q
MEDIA TYPE	
Image: Search for queues Search for queues SKILLS Search for skills LANGUAGES Search for languages DIRECTION	
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Search for queues Q SKILLS Search for skills Q LANGUAGES Q DIRECTION	
SKILLS Search for skills LANGUAGES Search for languages Q DIRECTION	
Search for skills Q LANGUAGES Search for languages Q DIRECTION Direction Direction	
LANGUAGES Search for languages	
Search for languages Q DIRECTION	
DIRECTION	
Inbound	
Outbound	

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.

Performance	Statuses Evalu	ations Intera	actions Sched	lule Develor	oment							
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Ŭ	Answer	Handle	Avg Han	Avg Talk	Avg Hold	Avg ACW	Hold	Transfer		TABLE COLUMNS		l
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12									Handle	PERFORMANCE	Sort: alpha	ab
8						▖▐				ACW		
0												
										Alert		
4										Alert Alert - No Answer		
4					_					Alert Alert - No Answer Answer		
4 2 0 Apr 1, 2024 A	pr 5, 2024 A	pr 9, 2024	Apr 13, 2024	Apr 17, 2024	Apr 21, 2	124 Apr	25, 2024	Apr 29, 2024		Alert Alert - No Answer Answer Avg ACW Handled		
Apr 1, 2024 A	pr 5, 2024 A	pr 9, 2024	Apr 13, 2024	Apr 17, 2024	Apr 21, 2	324 Apr:	25, 2024 •	Apr 29, 2024		 Alert Alert - No Answer Answer Avg ACW Handled Avg Contacting 		
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Click the save button to save your desired view.

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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<u>or click the Go</u> On Queue button on the left side in the Conversations pane.

Off queue:



On queue:



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		You're waiting on queue
		to handle assigned incoming conversations.

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.

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



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

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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: <u>Receiving a Practice Call From the Queue</u>)

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.

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	Americas (US West) [change]	
	Log In Forgot Your Password?	

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

 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.

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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.
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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.

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<

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

4.2 Making an Internal <u>Call</u> (Genesys User to Genesys User) <u>Call</u>

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 <u>either</u> the plus <u>or dialpad</u> 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.



4.2.1 Ending an Internal Call

There are two end call buttons. Click either to end the call. <u>Ending a call looks the same if using a WebRTC phone.</u>



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 <u>"</u>On Queue," <u>you may receive calls from the queue</u>.
 - 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.

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6. If using an external phone line, answer your ringing external phone.



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.

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		Caller Information
23 25		Caller Information CallerID: tel:

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.



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- **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.

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4.6 Conference

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

(Video instructions available: 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.

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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 Call4.7.2 Transfer the Second Party to the Third Party4.7.3 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.

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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.

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4.8 Expanding the Interactions Pane

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

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

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6 Supervisors

6.1 Introduction to Performance

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

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

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

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: <u>Renewing Reports</u>)

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, <u>SEE SECTION 3.1 AGENT DESKTOP CONTENT VIEWER</u>. 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 <u>SEE SECTION 6.1.1 VIEWING AGENT</u> <u>PERFORMANCE STATISTICS</u>.

00	Activity Directo	ory v Docu	ments Perfo	ormance 👻				(٩	🗘 🕥 Off Queue
	Agent Perform	+									
	Performance S	tatuses Evalua	ations Insights	Leaderboards	Development						
☆	Q 🗠					May 7, 2024					© ₽ 7 ¥ 9
		Time in Sta	Status	Answer	Handle	Avg Handle	Avg Talk	Avg Hold	Avg ACW	Hold	Transfer
S		N/A	N/A	-	4	5m 36s	7m 3s	-	-	-	-
_	(i) Chart Unavailable S	elect a column in th	e summary row								
4	S										
0.5	Agent 🔻	Time in Sta	Status	Answer	Handle	Avg Handle	Avg Talk	Avg Hold	Avg ACW	Hold	Transfer 🕀
Ĩ,	•	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	»				1 - 17 of 17 agents

• Agent Status *Show/Hide an example of the view* <u>SEE SECTION 6.1.2 AGENT STATUS</u>SEE SECTION 6.1.2 VIEWING AGENT STATUS.

00°	Activity Direc	ctory 👻 Do	cuments F	Performance	•						۱ (۵	🗘 🌖 off q	Queue
0	Agent Status	: +											
~	Performance	Statuses Eva	luations Insig	ghts Leaderbo	oards Develo	pment							
ជ	Q 🗠	Time in St	Status	Loggod In	00.0000	May 7	, 2024 >	Off Quouo	Available	Awov	Brook	Maal Maal	15
S		N/A	N/A	1 day 1h 43m 57s	1h 9m 29s	1h 8m 0s	14s	1 day 34m 28s	1 day 34m 28s	-	-	-	
	(i) Chart Unavailable	e Select a column i	n the summary rov	v									
2	Agent 🔻	Time in St	Status	Logged In	On Queue	Idle	Not Resp	Off Queue	Available	Away	Break	Meal	÷
දු		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	> >>					1 - 17 of 17 a	agents

• Queue Activity *Show/Hide an example of the view* <u>SEE SECTION 6.1.3 VIEWINIG QUEUE ACTIVITY</u>.

00	Activity Directory * D	ocuments P	erformance 🔻						٩	🗘 🌑 Off Queue
	Queue Activity : +									
~	Activity Performance									B 4 5 5
ы	4	Waiting	Interactions	Service Level % Interval/Day	On Queue	Off Queue		Interacting	Communicating	idle U S V S
S		0	0	a 10	N/A	N/A	N/A	N/A	N/A	N/A
	1									♦ 4
දු) Name 🖕	Waiting	Interactions	Service Level % Interval/Day	On Queue	Off Queue		Interacting	Communicating	Idle
C	ChildCare_Crawford_County_ VM	0	0		0	0	• 0 • 0 • 0	0	0	0
C	ChildCare_Grant_County_VM	0	0		0	0	• 0 • 0 • 0	0	0	0
C	ChildCare_Green_County_VM	0	0		0	0	• 0 • 0 • 0	0	0	0
c	ChildCare_Jowa_County_VM	0	0		0	0	• 0 • 0 • 0	0	0	0
c	ChildCare_Jefferson_County_ VM	0	0		0	0	• 0 • 0 • 0	0	0	0
c	ChildCare_LaFayette_County_ VM	0	0		0	0	• 0 • 0 • 0	0	0	0
C) Sourthern_CC_Crawford	0	0		0	0	• 0 • 0 • 0	0	0	0
c] Sourthern_CC_Grant	0	0	a 18	0	0	• 0 • 0 • 0	0	0	0
C] Sourthern_CC_Green	0	0	1 A.	0	0	• 0 • 0 • 0	0	0	0
C] Sourthern_CC_lowa	0	0	a. 1.45	0	0	• 0 • 0 • 0	0	0	0
1										•
?					« < 1 >	>>				1 - 29 of 29 queues

• Queue Performance *Show/Hide an example of the view* <u>SEE SECTION 6.1.4 VIEWING QUEUE</u> <u>PERFORMANCE</u>.

00	Activity	Directory 🔻	Documents	Performance 🔻											Q Ģ	Off Queue
	Queue Pe	rfor i +														
	Activity	Performance														
ជ	Q 🗠							April 202	24 →						1	0 Y Y S
S	U WisDHS	_Test_1		21	5 24%	15 71%	20s	15% 80%	17m 44s	30m 53s	1m 11s	-	35m 32s	-	8	-
	U WisDHS	_Test_1_VM		-						-	-	-	-	-	-	
	U WisDHS	_Test_2		4		3 75%		N% 80%	1h 31m 35s	9m 14s	4m 14s	-	5m 46s	-	1	
с°	U WisDHS	_Test_2_VM		Back				Alt+Left Arrow			-	-			-	
	U WisDHS	_Test_3		Forward				Alt+Right Arrow	85	8m 20s	21s	-	7m 49s		-	
	U WisDHS	_Test_3_VM		Reload				Ctrl+R	1 C	+		-	-		-	
	U WisDHS	_Training							145	27m 53s	1m 17s	17s	26m 58s	5	6	
	U WisDHS	_Training_OB		Save as				Ctrl+S		1m 21s	57s	-	14s		-	
				Print				Ctrl+P	> >>					_	1-2	9 of 29 queues
?				Cast												

• Interactions *Show/Hide an example of the view* <u>SEE SECTION 6.1.5 INTERACTIONS</u>VIEWING <u>INTERACTION DETAILS</u>.

00°	Activity	Directory 🔻	Documents Pe	rformance	•					o ¢ 💿	Off Queue
	New Tab	÷ -	+								
	Select a view to	o load by clickin	g its name:								
☆	Default		Q, Search Views] Saved				C	Search Saved Views	
S	Time zone	America/Chi	icago (UTC-05:00) (Local and 1	Vorks 🗸	Name 🔻	Base 💌	Time Period	Time Zone	Entities	Entity Count	
	Contact Cent	ter		^	Best Agents	Agent Performance	None	•	► Adam Afsary	, К З	÷
දී	Agent Perf	formance tus		1							
	DNIS Perfo	ormance									
	Interaction	15									
	Queue Act	tivity		- 1							
	Queue Per	formance		- 1							
	Scheduled	1 Callbacks		- 1							
	Skills Perfe	ormance									
	Wrap-Up P	Performance		- 1							
	Dashboards			^							
	Dashboard	d Owners		- 1							
	Dashboard	ds									
	Employee En	igagement		^							
	Agent Dev	elopment									
	Agent Eval	luation									
	Insights										
	Leaderboa	ards									
	My Develo	pment									
	My Scorec	card									
?	My Performa	ance		^ .							

• Dashboards *Show/Hide an example of the view* See Section 6.1.6 <u>DashboardsCreating a Dashboard</u>.

ą	Activity Directory • Documents	Performance *				_	🔍 🗘 🕥 Off Queue
 ○ ☆ 	Dashboard Three + Dashboard Three						■ 3x4 ⊕ 🖉 🖄
2 13 2	Agent Team One Acron Alort-Noi Acroser Assers Dailing Dailsourd	Pate 7 days to date 3 - 1 3 2	Available agents by county Dition: County, M Othilden: County, M Othilden: County, M Othilden: County, M Othilden: Linex, Lonex, MM Othilden: Linex, Lonex, MM Southen: COL County Southen: COL Deat		Queue Group One Alamon: No Illon % Alamon: % Alamon % Flam-On % Tamalan %	1009 - - - - -	Available Away 1 • 0 • Break Busy 0 • 0 • Communicating 0 • Idle Interacting
		+ Actilizer	Queue Group 2	: 			Meal Meeting O O O O Not Responding O O Off Queue 1 Office
0	20 § 3 ACM = Acade = Daking = Bror =	hợi 11 Angi 11		Aviss			On Queue O Online Training 1 O

This section describes general navigation in these views. <u>SECTION 6.1.1 VIEWING AGENT PERFORMANCE</u> <u>STATISTICS</u>, 6.1.2 VIEWING AGENT STATUS, 6.1.3 VIEWING QUEUE ACTIVITY, and 6.1.4 VIEWING QUEUE <u>PERFORMANCE</u> provide view-specific information.

Open a View

To open a view:

ő Documents Activity Directory -Performance -Workspace ÷ New Tab + 2. Select a view to display. 🛕 🕥 Off Queue New Tab : + Select a view to load by clicking its name: Default Q Search Views Saved Q Search Saved Views S Time zone America/Chicago (UTC-05:00) (Local and Works... Name 🔻 Base 💌 Time Pe... Time Zone Entities Entity C. Test My Interactions 0 None . Contact Center Agent Performance Agent Status DNIS Performance Interactions ueue Activity eue Performance Scheduled Callbacks Skills Performance Wrap-Up Performance Dashboards Dashboard Owners Dashboards Employee Engagement \sim ?

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

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.

Performance St	atuses Evaluatio	ons Insights	Leaderboards D	evelopment							
۹ 🗠						 April 3 	2024 •				I 2 V
	Time in Status	Status	Answer	Handle	Avg Handle	Avg Talk	Avg Hold	Avg ACW	Hold	Transfer	Add/Remove Column
	N/A	N/A	334	504	20m 4s	1m 30s	13m 42s	19 m 49 s	11	38	
(i) Chart Unavailable Se	lect a column in the s	ummary row									O Search Columns
B											
Agent •	Time in Status	Status	Answer	Handle	Avg Handle	Avg Talk	Avg Hold	Avg ACW	Hold	Transfer	
• A	11 days	Offline	-	2	15h 29m 26s	5s		15h 29m 6s	-		Performance
D • B	2 days	Offline	54	58	6m 13s	555	24m 52s	2m 44s	- 6		ACW
	7.	049:			0.1100	-			_		Agent
	7 days	Omme		-	-		-	-	-	-	Alert - No Answer
• Z	11 days	Offline		-	-			-	-	-	Answer
🗆 🔹 Ji	1 day	Offline			-			-	-	-	Avg ACW
a J	101	Offling									Avg Hold
н т	TUT days	Omme						-			_ Avg Talk
□ • J	1 day	Offline	-	-	-	-	-	-	-	-	Avg ACW Handled
🗆 🔹 K	23 days	Offline	1	1	18h 22m 12s	1s	-	18h 22m 10s	-	-	Avg Dialing
• • K	18h 59m 1s	Offline	10	30	10m 27s	5m 3s	235	6m 7s	3	3	Avg Handle
- K	6.00.40		10		00 40	- 17		00 50	_		Avg Hold Handled
	0n 39m 40s	Available	43	44	29m 40s	om 475	•	23m 535	-	-	Avg Monitor
• • •	3h 37m 46s	Offline		28	12m 59s	2m 50s	1.00	13m 37s	-	3	Blind Transfer %
🗆 🔹 P	1 day	Offline	33	65	7m 34s	2m 22s		5m 52s	-	8	Consult Transfer
	1 day	Offline		8	2m 14s	2m 8s		-	-	-	Consult Transfer %
S C A B	0.09 date	Offline							_		Contacting
	90 odys	Online									Department
e e	3 days	Offline	4	4	4m 26s	3m 39s	-	48s	-	-	Dialing
R	2h 27m 6s	Available	8	68	1h 0m 32s	15s	85	1h 9m 27s	2	1	Duration
- J.	00.10.00	0/0:	400	405	51	10-		42-	_		Duration 2
	1 20n 19m 39s	Offline	180	195	515	105	-	435	_	23	Duration 3
🗆 • S	10 days	Offline	1	1	2m 59s	1m 31s	-	1m 28s	_	-	Email

- 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.

00°	Activity Directory	 Documents 	Performance	•					🔍 🗘 💽 off q	ueue
	Agent Perform	+								
	Performance Stat	tuses Evaluations	Insights Leader	boards Developme	ent					
☆	Q 🗠				 April 2024 > 				:2 ℃ ⊻	C 1
		Answer	Handle	Avg Handle	Avg Talk	Avg Hold	Avg ACW	Hold	Transfer	
S		334	504	20m 4s	1m 30s	13m 42s	19m 49s	11	38	
	(i) Chart Unavailable Sele	ct a column in the summ	nary row							
\Box	C									
	Add to filters Deselect	all Selected Rows:	3							
_ کې	Agent 🗸	Answer	Handle	Avg Handle	Avg Talk	Avg Hold	Avg ACW	Hold	Transfer	\oplus
	2 1		2	15h 29m 26s	5 s	-	15h 29m 6s	-	-	
	☑ 2	54	58	6m 13s	55 s	24m 52s	2m 44s	6	-	
		-	-	-	-	-	-		-	
			-	-	-	-	-	-	-	
		-	-		-	-	-	-	-	
		-			-	-	-		-	
		1	1	18h 22m 12s	1s	-	18h 22m 10s	-	-	
	2 3	10	30	10m 27s	5m 3s	23 s	6m 7 s	3	3	
		43	44	29 m 40 s	5m 47s		23m 53s		-	
		-	28	12m 59s	2m 50s	-	13m 37s	-	3	
		33	65	7m 34s	2m 22s	-	5m 52s	-	8	
			8	2m 14s	2m 8s	-	-			
?				«	< 1 >	»			1 - 17 of 17 a	gents

The selected items are displayed individually.

00°	Activity Dire	ectory - Documents	Performance	▼				() ¢ 💿	Off Queue
0	Agent Perform	: +								
~	Performance	Statuses Evaluations	Insights Leaderb	oards Developme	ent					
ы	α ⊵	Answer	Handle	Avg Handle	 April 2024 → Avg Talk 	Avg Hold	Avg ACW	Hold	Transfer	(± 5
S		64 Answer	90	28m 9s	2m 9s	16m 43s	24m 39s	9	3	
	(i) Chart Unavailabl	le Select a column in the summ	ary row							
\Box	6	2		3 View	/ as group • Clear All					
0.	Agent 🗸	Answer	Handle	Avg Handle	Avg Talk	Avg Hold	Avg ACW	Hold	Transfer	\oplus
Ř	· · 1		2	15h 29m 26s	5s	-	15h 29m 6s	-	-	
	· · 2	54	58	6m 13s	55 s	24m 52s	2m 44s	6	-	
		10	30	10m 27s	5m 3s	23s	6m 7s	3	3	
									1-3 0	of 3 agents
(?)				~~	< 1 >	>>				

ö	Activity Directory -	Documents Pe	erformance 👻						off c	Queue
0	Agent Group P : +									
_	Performance Statuses	Interactions								
☆	3 agents	Q 🗠		•	April 2024 🔸					± ๖
_		Answer	Handle	Avg Handle	Avg Talk	Avg Hold	Avg ACW	Hold	Transfer	
S		64	90	28 m 9 s	2m 9s	16m 43s	24m 39s	9	3	
	(i) Chart Unavailable Select a colu	umn in the summary row								
\Box	© ()	2	3	Clear All						
Ō"	Interval 🔻	Answer	Handle	Avg Handle	Avg Talk	Avg Hold	Avg ACW	Hold	Transfer	÷
\cap'	Apr 1, 2024	2	2	1m 12s	18 s	-	55s	-	-	
	Apr 2, 2024	-	-	-	-	-	-	-	-	
	Apr 3, 2024	1	1	18m 50s	10m 45s	6 s	7m 59s	1	-	
	Apr 4, 2024	-	-	-					-	
	Apr 5, 2024	2	2	3m 23s	1m 48s	-	1m 34s	-	-	
	Apr 6, 2024		-	-		-			-	
	Apr 7, 2024	-	-	-		-	-	-	-	
	Apr 8, 2024	Apr 7, 2024 3	3	4m 38s	3m 40s	-	58s	-	-	
	Apr 9, 2024	13	15	2m 0s	1m 7 s	-	56s	-	-	
	Apr 10, 2024	-	4	2m 32s	2 m 26 s	-	6 s	-	-	
	Apr 11, 2024	-	1	1h 6m 32s	12 s	-	1h 6m 10s	-	-	
	Apr 12, 2024	3	9	31 m 25 s	7m 33s	43m 1s	9m 25s	3	-	
	Apr 13, 2024	-	-	-	-	-	-	-	-	
?									30 intervals	0

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

Save, Filter, or Export a View

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

👸 Activity Directory 🕶 Doc	uments Performance -							Q ¢ (Off Queue
Agent Group P : +									
Performance Statuses Inter	actions								
🖒 🔆 3 agents	Q 🗠			 April 2024 → 				8.2	C ¥ D
	Answer	Handle	Avg Handle	Avg Talk	Avg Hold	Avg ACW	Hold	Transfer	
S	64	90	28m 9s	2m 9s	16 m 43 s	24m 39s	9	3	
(i) Chart Unavailable Select a column in	the summary row								
		Clear All							
O ₃) Interval •	Answer	Handle	Avg Handle	Avg Talk	Avg Hold	Avg ACW	Hold	Tansfer	€
Apr 1, 2024	2	2	1m 12s	18s	-	55s	-		
Apr 2, 2024	-	-	-	-	-	-	-	1 .	
Apr 3, 2024	1	1	18m 50s	10m 45s	65	7 m 5 9s	1		
Apr 4, 2024	-	-	-	-	-				
Apr 5, 2024	2	2	3m 23s	1m 48s	-		Filter		
Apr 6, 2024		-	-	-	-	Save		Reset	
Apr 7, 2024	-	-		-	-				
Apr 8, 2024	3	3	4m 38s	3m 40s				5	
Apr 9, 2024	13	15	2m 0s	1m 7s	-	_	7		
Apr 10, 2024	-	4	2m 32s	2m 26s	-				
Apr 11, 2024		1	1h 6m 32s	125	-	Refr	esh Dow	nload	
Apr 12, 2024	3	9	31m 25s	7m 33s	43 m 1s	511203			
Apr 13. 2024		-	-	-	-	-	-	-	

Save and Open a View

00°	Ac	ctivity	Directory 👻	Documents	Performance	•					🔍 🗘 🕥 Off Queue
	Be	est Agents	+								
	Performance Statuses Evaluations Insights Leaderboards Development										
☆	Q 🗠						 Apr 	 ▲ April 2024 → 			C ¥ 7 S 3
_			Answer	Handle	Avg Handle	Avg Talk	Avg Hold	Avg ACW	Hold	Transfer	SAVE VIEW ×
S			64	90	28m 9s	2m 9s	16m 43s	24m 39s	9	3	Save View As Overwrite Existing View
	í	() Chart Unavailable Select a column in the summary row									
4	C						View as grou	p • Clear All			View Name
0.5		Agent	 Answer 	Handle	Avg Handle	Avg Talk	Avg Hold	Avg ACW	Hold	Transfer 🕒	Best Agents ×
Ĩ,		•	-	2	15h 29m 26s	5 s	-	15h 29m 6s	-	-	– Default time period
		•	54	58	6m 13s	55 s	24m 52s	2m 44s	6	-	Last Month 🗸
		•	10	30	10m 27s	5m 3s	23 s	6m 7 s	3	3	
									-		Save Cancel
?					«	1	>			1 - 3 of 3 agents	

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

To later open that view, click the new tab plus button and select the saved view from the list.
ő	Activity		Documents	Performanc	e 🕶					Q L) 🕕 Off	fQueue
	New Tab	: +]									
	Select a view to	o load by clicking it	is name:									
☆	Default		Q Search Views			Saved				Q Search Sav	ed Views	
S	Time zone	America/Chicaç	go (UTC-05:00) (Loca	l and Works 🗸	1	Name 💌	Base 💌	Time Pe	Time Zone	Entities	Entity C	
	Contact Cent	ter		^		Best Agents	Agent Performance	Last Month	-		3	÷
දු	Agent Per	formance										
	Agent Stat	tus										
	DNIS Perfe	ormance										
	Interaction	ns										
	Queue Act	tivity										
	Queue Per	rformance										
	Scheduled	d Callbacks										
	Skills Perf	formance										
	Wrap-Up F	Performance										
	Dashboards			^								
	Dashboard	d Owners										
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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.

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Filter by full Provider Q	
WRAP-UP	
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Changes to the default filter settings are displayed in the view.

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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 Performace 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, <u>SEE SECTION 6.1 SUPERVISOR DESKTOPINTRODUCTION TO PERFORMANCE</u>.

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☆	Q [2]					 April 2024 > 					© ₽ 7 ± 5
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	S.										
<u>o</u> »	□ Agent ▼	Time in Sta	Status	Answer	Handle	Avg Handle	Avg Talk	Avg Hold	Avg ACW	Hold	Transfer 💮
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		57 days	Offline	-	-	-	-	-	-	-	-
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	•	83 days	Offline	-	-	-	-	-	-	-	-
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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 DESKTOPINTRODUCTION TO PERFORMANCE.

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	•	50 days 5h 42m 3s	Offline	-	-	-	-	-	-	-	-	-	
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	•	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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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.

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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.

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Selectable statuses for Status and Secondary Status include:

- Available
- Busy
- Away
- Break
- Meal
- Meeting
- Training
- On Queue

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

Routing Status:

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

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

Various Status Combinations

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.

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•	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				-			-			
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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 <u>SEE SECTION 6.1 SUPERVISOR DESKTOPINTRODUCTION TO PERFORMANCE</u>.

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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 <u>dowloadingdownloading</u>, <u>SEE SECTION 6.1 SUPERVISOR DESKTOPINTRODUCTION</u> TO PERFORMANCE.

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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, <u>SEE</u> <u>SECTION 6.1 SUPERVISOR DESKTOP</u>. SEE SECTION 6.1 INTRODUCTION TO PERFORMANCE. For <u>SEE SECTION 6.2.1</u> <u>COACHING AND MONITORING AGENTS</u>.

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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

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6.2.1.1 Selecting a Live Call
6.2.1.2 Coaching a Call
6.2.1.3 Monitoring a Call
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(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 <u>dowloading, <u>SEE SECTION 6.1 SUPERVISOR</u></u>

<u>DESKTOP.downloading, SEE SECTION 6.1 INTRODUCTION TO PERFORMANCE.</u> 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.

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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.

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Search for filters Q	Interactions
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MOS	MOS -
Range Above Below	Surveys
1 to 5	Outbound
Apply Clear	Journey
SIP CALL ID	Flows
Filter by SIP Call ID	External Contact

5. Click the live call in the interactions view.

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2	20	6	1.84	1998	8	Thu, Feb 13, 2025 10:57 AM	3-261	Outbound			1	interactions		
	0	\$				Thu, Feb 13, 2025 10:16 AM	44m 30s	Inbound	1.1	2	1	LIMIT INTERACTIONS		

6.2.1.2 Coaching a Call

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

	Activity Directory - Documents Perfor			Q Q Off Queue
	Agent Interacti I 8c6dd06d-e78 I +			
-	& 8c6dd06d-e784-4c12-b014-c74f05e2			8
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	Details Timeline Transcript			
	Interaction Metrics Interaction Type	Call		
	Interaction ID	8c6dd06d-e784-4c12-b0f4-c74f05e2e105 🖄		
	Start Time	Tuesday, May 7, 2024 11:33:41 AM		
	Duration	145		
	Internal Participant(s)			
	Disconnect Reason	Allocks CA		
	Disconnect Reason	Atlanta GA		
	5 K K			
	Activity Directory - Documents	Performance • Admin		
۰	My Status I Interactions	1 LIP-1 +		
+		62		Last updated: February 13, 2025 11:02 AM
2 13 2	INTERNAL Monitor Coach	START TIME Thursday, February 13, 2025 10:57:42 AM	DURATION 4m 41s	END TIME UVE
	EXTERNAL © Barge in		This interaction is currently in progress.	
	Details Timeline Transcript			
	Interaction Metrics			
	Interaction Type	Call		
	Interaction ID			
	Start Time	Thursday, February 13, 2025 10:57:42 AM		
	Direction	Outbound		
	25(35))	ALL		
	Queue	and the second sec		19

- 2. Answer your phone to be connected to the call. Do not click the on-screen answer button. The parties on the call <u>will do</u> not know you are listening.
- 3. Click the <u>Interactions button on the left Communications Sidebar and click the</u> 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.

00 °	Activity Directory - Documents Perform	mance 👻		 C Off Queue
	Agent Interacti I 8c6dd06d-e78 I +			
<u> </u>	& 8c6dd06d-e784-4c12-b0f4-c74f05e2			Ĩ
12 J []	LIVE	TIME , May 7, 2024 11:33:41 AM	DUBATION 1m 45s	ENO TIME LIVE
ଝ	EXTERNAL © (a) Atlanta GA (b) +1		This interaction is currently in progress.	
	Details Timeline Transcript			
	Interaction Metrics			
	Interaction Type	Call		
	Interaction ID	8c6dd06d-e784-4c12-b0f4-c74f05e2e105		
	Start Time	Tuesday, May 7, 2024 11:33:41 AM		
	Direction	Outbound		
	Duration	1:45		
	Internal Participant(s) Disconnect Reason			
	External Participant(s) Disconnect Reason	Atlanta GA		
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. 🔹		Performance • Admin		ermo no 💽 🗘 📀
	My Status I Interactions	1		
-	V 100 100 100.00	ø		Last updated: February 13, 2025 11.02 AM
\$				
0	LVE	Thursday, February 13, 2025 10:57:42 AM	DURATION 4m 41s	END TIME LIVE
20	Monitor			
	EXTERNAL Q3 Barge In ©		This interaction is currently in progress.	
	Details Timeline Transcript			
	Interaction Metrics			
	Interaction Type	Call		
	Interaction ID			
	Start Time	Thursday, February 13, 2025 10:57 42 AM		
	Direction	Orthoard		
	Common Comm			
O	Concerne and Conce	sector state		

2. Answer your phone to be connected to the call. Do not click the on-screen answer button. The parties on the call <u>will_do</u> not know you are listening.

3. Click the pause end monitoring button to placestop monitoring.

=	Activity Directory - Documents	Performance - Admin		
0	Conversations	& 356 D		
42 &	S 00	& Call Interaction		« :
6		Interaction Details		
*		Interaction Type:	Call	
		Interaction State:	Connected	
		Queue Name:		
		Customer's Number:	and Report	

3.4. Or click the calldrop-down menu on hold or the end call button to endleft side of the call.





window and select Stop Monitoring to stop monitoring.

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 wrapup code. For additional information filtering, exporting, saving views, and dowloading, <u>SEE SECTION 6.1</u> <u>SUPERVISOR DESKTOP</u>-downloading, <u>SEE SECTION 6.1 INTRODUCTION TO PERFORMANCE</u>.

Open an interaction:

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



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

Activity Directory - Documents Performance -			·				🔍 🗘 🕥 Off Queue
Interactions : 4c60ddd7-c5b : +							
Interactions							
☆			May 9, 2024 >				C 🛂 🔽 🕄
ALL Recorded Clear All							FILTERS ×
Users Remote	Date 🔺	Conversatio	Direction	Queue	Wrap-up	Ð	Search for filters Q
	Thu, May 9, 2024 11:00 AM	55s	Inbound	ACDSystems	-	÷	Interactions
	Thu, May 9, 2024 9:40 AM	6s	Inbound	-		- 1	Manual
o, 0 %	Thu, May 9, 2024 9:38 AM	1m 15s	Inbound	ACDSystems		÷	Preferred
	Thu, May 9, 2024 9:37 AM	0.183s	Inbound	-		- 1	☑ Standard
	Thu, May 9, 2024 8:55 AM	35s	Inbound	EMCAPO_WWMA_Gen		÷	AGENT ASSIST
	Thu, May 9, 2024 8:34 AM	30s	Inbound	EMCAPO_DOC		÷	Show only interactions with Agent Assist
	Thu, May 9, 2024 8:33 AM	1m 1s	Inbound	EMCAPO_DOC		÷	/ Telefilet
	Thu, May 9, 2024 8:15 AM	23s	Inbound	+		÷	EXTERNAL TAG
	Thu, May 9, 2024 8:14 AM	245	Inbound	+	-		Filter by External Tag
	Thu, May 9, 2024 8:12 AM	1m 25s	Inbound	Tm	Default Wrap-up Code	1	AUTHENTICATED
	Thu, May 9, 2024 8:10 AM	59s	Inbound	WFCAP_Gen	Default Wrap-up Code	- 8	🗹 Yes
	Thu, May 9, 2024 8:06 AM	4m 35s	Inbound	EstRec_Gen	Default Wrap-up Code	÷	No
	Thu, May 9, 2024 8:04 AM	1m 29s	Inbound	ACDSystems	Default Wrap-up Code	÷	RECORDED
							Surveys Outbound Journey
0	« < 1	> >>					External Contact

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

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INTERNAL No Participants	CRECORDING START TIME Thu, May 9, 2024 8:15:07 AM	PROGRESS 0m 00s / 0m 22s	RECORDING EN Thu, May 9, 2024 8:15
EXTERNAL © Cell Phone WI 20 +1	Add Aenotation	d build also is in the set of a lite set of	
Details Timeline Trans	ript		
Interaction Metrics		Recording Information	
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Interaction ID	fac89bc6-845a-42d0-82ec-641f368aabde 🐴	Archive Date	Non
Start Time	Thursday, May 9, 2024 8:15:07 AM	Delete Date	Non
End Time	Thursday, May 9, 2024 8:15:30 AM	Exported Date	Non
Direction	Inbound	Protected:	🖬 N
Duration Internal Participant(s) Disconnect Reason	0.23	⊥ Download	
External Participant(s) Disconnect Reason	Cell Phone WI Endpoint		
Participant Data			

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.

00°		cuments Performance -		Q 🗘 🕥 Off Queue
	Agent Status : Interaction	ons : cc196000-bf72 : +		
	& cc196000-bf72-48db-b99c-4	1afcd54 🖓		E.
☆	INTERNAL 29 Multiple 👻	C RECORDING START TIME Wed, May 15, 2024 11:55:59 AM	PROGRESS 0m 00s / 0m 20s	RECORDING END TIME Wed, May 15, 2024 11:56:20 AM
S [] ô	EXTERNAL © 전	0	hallen on an announce an and and a shall a shall have been been been been been been been be	
	Details Timeline Transc	/ Add Annotation	Annotate	
	Interaction Metrics		Recording Information	
	Interaction Type	Call	Call Recording 1 - Segment 1	(Edit)
	Interaction ID	cc196000-bf72-48db-b99c-41afcd543303 街	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		
	Disconnect Reason			
	External Participant(s) Disconnect Reason	122-		
	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.

ő		Performance 👻			🚺 🗘 💿 Off Queue
	Agent Status : Interactions :	сс196000-bf72 : +			
\$	& cc196000-bf72-48db-b99c-41afcd54	<i>Ф</i>			•
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දු	Interaction Metrics		Recording Information		
	Interaction Type	Call	Call Recording 1 - Segment 1		(Edit)
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	End Time	Wednesday, May 15, 2024 11:59:45 AM	Exported Date		None
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	Internal Participant(s) Disconnect Reason		Download	Ория Ория Мр3	
				Wav Webm	
	External Participant(s) Disconnect Reason			-	
	Wrap-up Information				
	Name	Guru Mandrachalam			
	Code				
	Participant Data				
?					

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.

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	Queue Activity : +		
~,	Activity Performance Er	nail Message Routing	
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S		0	0
۲.	ALL		
0.	🗆 Name 💂	Waiting	Interactions
×?	ACDSystems	0	0
	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.

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	eue Activity	L +									
	Activity Perfo	mance Email	Message Interactions Age	da Waq-Up							
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			No data available								
1					Agent Liet Updated Feb 17, 2020	237.9%		4 4 4			

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.

Filter user(s)		ter user(s) Q		1-1 of 1 inactive agents					
us 🛊	Skills	Duration	Media Types	\$	€				
ne	English,		S&DE	Activate	6				

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.

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ent Per	Agent	dea	activat	ed.		×
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	-			ß	•	5

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.

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쇼	Genesys Clo	oud Admin			
S C	Search				
2	People & Permissions	Contact Center	Routing		
\frown	People	ACD Skills & Languages	Operating Sche	edules	
		Queues	Emergency Gro	oups	
		Panel Manager			
nter (Callback in the Search b Activity Directory - Documents	y name box to filter by the Performance + Admin	desired schedule	<u>e.</u>	o 4 💿
•	Routing / Operating Schedules				
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କ ଘ ୟ	Q Calba	× V Filter		(D Usages E	Limits (8) Customize

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



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

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Operating Schedules	Schedule Group						
Envergency Groups							
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 Da	Contraction Contraction Contraction						
	Open Schedules	Closed Schedules	Holiday Schedules				
	Add existing schedules	~ calback	Add existing schedules				
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	- 0800-1600 F		- 3034 Christmas Eve (State Holiday)				
	5 0800-1600 M-W	0	- 2034 Day After Thanksgiving				
	- 1206-1600 Th	0	- 2024 Independence Day (State Holiday)				
			- 2024 Juneteenth				
			= 2024 Labor Day (State Holiday)				
			- 2024 Memorial Day (State Holiday)				
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7. 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 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.

_								
Operating Schedules	Schedule Group							
Emorgency Groups	The time in America/Dricego is 2-43 PS	The time in America/Dricago is 2-43 PM. This schedule group is currently closed.						
	Coverview O Schedules Calenda	×						
	Open Schedules		Closed Schedules		Holiday Schedules			
	Add existing schedules	~	Add minting schedules	v	Add existing schedules			
	5 0500-2200 M-F	0	5 CalibackCosum,3607	0	- 2024 Christmas Day (State Holiday)			
	- 0800-1600 F	0			- 2024 Christmas Eve (State Holiday)			
	5 0800-1600 M-W	0			- 2024 Day After Thanksgiving			
	- 1200-1600 Th	0			- 2024 Independence Day (State Holiday)			
					- 2024 Juneteenth			
					- 2024 Labor Day (State Holiday)			
					- 2924 Memorial Day (State Holiday)			
10 ReservedChange 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
- <u>Business event requests</u>
- 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: <u>helpdesk@wi.gov</u> (preferred)
- Phone: 608-261-4400 (Madison) | 866-335-2180 (Toll-free)
- State employees may use the Cherwell Portal

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

Subject Line

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

Do	Don't
 Cannot log into Genesys Agent Desktop Unable to download recordings in Genesys Interaction Recording Genesys new user request Please set the Genesys Technical Business Event 	 Genesys Problems Genesys Issue Genesys isn't working Trouble with Genesys

Description

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

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

- Name and 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

То	helpdesk.wi.gov	
Cc		
Bcc		

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.

The credentials you entered are invalid. Please check your email address, password, and organization name and try again.	DHS.Genesy
3	[Change Organization]
Americas (US West) [change]	
The Genesys Cloud platform is the property of Genesys Cloud Services, inc. It is provided for the intended use of your organization under terms of service. The use thereof may be monitored for improper use or unauthorized access.	
Log In	
Entroph Vour Partmaner()	

▷ Send ~	۰ ا
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 Clo When I attempt to log in, I get the following error	oud. I was able to log in yesterday.
Concepts Cloud	
The contestible use and see invalid	
Please check your email address, password, and organization name and try again.	Genesy
[Change	Organization]
A	
Americas (US West) [change]	
Log In	
Forgot Your Password?	
Thanks.	
and the second se	

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