# **Genesys Decisions**

Genesys Decisions Administration Guide 8.5



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# **Chapter 1: Introduction**

This document goes through the process of creating configurations, mapping and importing historical data, as well as creating simulations within the Genesys Decisions Administration application. To make the process intuitive, all the steps are numbered and should be performed in the order they are listed.

Once all steps in section 2 have been completed, you can login to the User application and begin building scenarios.

Please see Genesys Decisions IT Administration Guide or installation instructions and system requirements.

# **Chapter 2: Create Configuration**

#### **Section 1: Configuration Overview**

A Genesys Decisions routing configuration is the combination of Center, Staff, and Contact Types that will need to be identified and maintained for accurate planning.

This includes:

- What is the level of detail that the current planning documents contain?
- What is the flow of contacts to agents (i.e. which agent groups handle which calls/emails/chats)?
- In what centers are these agent groups located?
- What is the level of detail that hiring plans need to contain?
- Do contacts route to more than one agent group?

Genesys Decisions offers multiple configuration options to fit any contact center organization. The configuration can include any or all the below:

- Inbound Phone
- Outbound Phone
- Chat
- Email
- Casework

A configuration can be set up as Multi-Channel for Inbound Phone, Outbound Phone, Chat, Email and Casework. A configuration can be set up as Multi-Skill with Priority for Inbound Phone and Outbound Phone.

#### Section 2: Setting up a New Configuration

Once you are logged in to the Admin Application, click on the Configure button to open the Configure/Review Settings window and perform the following tasks in order.





You can also configure the Admin application by using the menus above the icons:

Import	Settings Help	
A Import	Configure Ctrl+F Customize Metrics Decimal Optional Metrics	
	Data Mart	

#### Section 3: Add a Center

A center is typically the physical location for each of the staff types which can also include virtual or "At Home" agents. The center grouping allows for more detailed historical data which can highlight performance differences in each center (AHT, shrinkage, attrition, hiring plan, etc.) as well as more detailed forecasting.

- Click on 1. Add/Edit Centers
- Click on the green Add button

Configure/Review Settings  . AddEdit Center(s)  . AddEdit Center(s)  . AddEdit Center(s)  . AddEdit Contact Group(s)  . AddEdit Contact Group(s)  . Edt Email & Gesework Bucket	Centers Cose
	Name
	Annapolis
10. Build Review Simulation(s)	Dallas
	Orlando
	Outsourced

- A blank cell will be created in the table
- In the blank cell, add the new center name in the name column
- Continue performing the previous 3 steps until all desired centers are added
- Click the Save button and close the window by clicking on the X at the top right corner or by clicking on the Close button



#### Section 4: Add a Staff Type

A staff type refers to a grouping of agents that handle one or more contact types. Staff types can be in multiple centers and typically there is one hiring plan per staff type and center.

- Click on 2. Add/Edit Staff Types
- Click on the green Add button

Configure/Review Settings	Show/Hide Disabled Staff Types
	Name
	Casework
10. Build/Review Simulation(s)	Chat
	Collections
	Customer Service

- A blank cell will be created in the table
- In the blank cell, add the new staff type name in the name column
- Continue performing the previous 3 steps until all new staff types are added
- Click the Save button and close the window by clicking on the X at the top right corner or by clicking on the Close button

#### Section 5: Assign Staff Type to Centers

Now that all centers and staff types have been created, you now need to indicate which staff types are in which centers.

- Click on 3. Assign Staff Type to Centers
- Select a center from the center list
- Select all staff types that should be assigned to that center and move them to the Associated Staff Types window by selecting the check box next to the staff type





- Select the next center from the list and perform the same steps
- Once all the staff types have been assigned to the appropriate centers, close the window by clicking on the close icon. You can also click the save button at any time to save your current changes.

#### Section 6: Add a New Contact Group

A Contact Group is a combination of one or more contact types that are routed to one or more staff types.

- Click on 4. Add/Edit Contact Groups
- Click on the green Add button

🕵 Configure/Review Settings			
1. AddÆdit Center(s)     2. AddÆdit Staff Type(s)     3. Assign Staff Type to Center(s)     4. AddÆdit Contact Group(s)     5. AddÆdit Contact Type(s)     6. Edd Email & Casework Buckets	Contact Groups		
9. Assign Center-Staff Type(s) to Business Uni	Name	Used For Planning	Allow Multi-Skill with Priority Configuration
10. Build/Review Simulation(s)	Casework	<b>V</b>	
	Chat		
	Collections		
	Customer Service		
	Email		
	Financial Service		
	Outbound		
	Reservations		
	Reservations old		
	Sales		
	Services		
	Tech Support		

• A blank line will be created in the table



- Add the new contact group name
- If the contact group is a Multi-Skill with Priority configuration (see Section 2.2.7) then check the Allow Multi-Skill with Priority Configuration box. The "Used for Planning" box must be checked to either indicate that the contact group name is used in the planning process or is there to identify unplanned work (unmapped contacts).
- Continue performing the previous 3 steps until all new contact groups are added
- Click the Save button and close the window by clicking on the X at the top right corner or by clicking on the Close button

#### Section 7: Add a New Contact Type

A contact type is a queue or multiple queues that are routed to one or more staff types in one or more centers. Contact types can be inbound phone, email, chat, outbound phone or casework.

- Click on 5. Add/Edit Contact Type
- Click on the green Add button

Review Settings							
dit Center(s) dit Staff Type(s)	🕹 Contact Types						
In Staff Type(s) idit Contact Type(s) idit Contact Type(s) mail & Casework Buckets contact Routing	Show/Hide Disabled Add Contact Types	ave Enable/Disable	Close				
low Through Hiring Template gn Center-Staff Type(s) to Business Un	Name	Contact Group	Media Type	Service Level (%)	ASA (S)	Abandon Rate (%)	Call Priority
1/Review Simulation(s)	Bronze	Financial Service	Phone	90	15	1	3
	Casework	Casework	Casework	80			
	Chat	Chat	IM	80	15	-	3
	Coll Inbound	Collections	Phone	80	15	3	3
	Coll Outbound	Collections	Outbound				
	Customer Service	Customer Service	Phone	80	5		3
	Email	Email	Email	80			
	English Tech	Tech Support	Phone	70	25	5	5
	Gold	Financial Service	Phone	90	10	2	2
	OB Activation	Customer Service	Outbound				
	OB Customer Survey	Outbound	Outbound				
	Reservations Chat	Reservations	IM	80	15	3	3
	Reservations Voice	Reservations	Phone	80	15	3	3
	Sales	Sales	Phone	80	15	3	3
	Services	Services	Phone	80	15		3
	Silver	Financial Service	Phone	90	15	]	3
	Spanish Tech	Tech Support	Phone	70	25		5

- A blank line will be created in the table
- Perform the following steps:
  - Enter the new contact type name in the Name column
  - Select the appropriate contact group from the drop-down list
  - Select the appropriate media type from the drop-down list
  - Enter the SVL, ASA, Abandon Rate, Max Extra Time and Max Under Time goals
  - If the new contact type is Multi-Skill with priority, then enter the Call Priority for that contact type (See Section 2.2.7)
- Click the Save button and close the window by clicking on the X at the top right corner or by clicking on the Close button



#### Section 8: Add Email/Casework Buckets

If your configuration consists of either an Email or Casework (or both) contact type(s) you will need to setup the backlog and handled within buckets. There are 8 buckets to be configured and each can be in either hours or days. The backlog buckets will allow you to see historically as well as the forecasted amount of Emails or Casework that were backlogged or are forecasted to be backlogged for the set amount of time assigned to each bucket. The same bucket settings will be used to see historically as well as the forecasted amount of Emails and Caseworks that were or will be handled in the set amount of time assigned to each bucket. *Note: the upper bound for each bucket should match the upper bound for each bucket in the historical data feed*.

- Click on 6. Edit Email & Casework Buckets
- Select the contact group and media types from the appropriate drop down lists

Configure/Review Settings				8
1. Add/Edit Center(s) 2. Add/Edit Staff Type(s) 3. Assign Staff Type to Center(s)	S Email/Casewo File	ork Configuration		
4. Add/Edit Contact Group(s)     5. Add/Edit Contact Type(s)     6. Edit Email & Casework Buckets     7. Edit Contact Routing     8. Edit Flow Through Hiring Template	Contact Group Media Type	Casework		<b>.</b>
9. Assign Center-Staff Type(s) to Busin 10. Build/Review Simulation(s)		ally purge backlog after	0.00	HOURS
	Bucket	Upper Bound	Time Unit	Service Level Threshold
	1	4	HOURS	0
	2	8	HOURS	
	3	12	HOURS	0
	4	16	HOURS	0
	5	20	HOURS	•
	6	24	HOURS	0
	7	36	HOURS	0
	8	48	HOURS	0
				OK Cancel

- Select either Hours or Days from the Time Unit drop down list
- In the Upper Bound column enter in the number of hours or days for each bucket
- Click the radio button in the Service Level Threshold column to select the service level goal for the contact type
- Click the Save button and close the window by clicking on the X at the top right corner or by clicking on the Close button

#### **Section 9: Set up Routing**



Now that all the centers, staff types, contact groups and contact types have been created you now must indicate which contact types route to which staff types and centers.

- Click on 7. Edit Contact Routing
- The Routing Type will default to Initial Setup
- Select the Contact Group from the drop-down list
- Sort by either Center or Staff Type and click OK

Configure/Review Settings		
1. Add/Edit Center(s)     2. Add/Edit Staff Type(s)     3. Assign Staff Type to Center(s)     4. Add/Edit Contact Group(s)     5. Add/Edit Contact Type(s)     6. Edit Email & Casework Buckets     7. Edit Contact Routing     8. Edit How Through Hiring Template     9. Assign Center-Staff Type(s) to Business Un     10. Build/Review Simulation(s)	Contact Routing  Selection  Bouting Type Initial Setup Contact Group Customer Service Sort Record By Center	
	OK Cancel	

• Depending on the sort method selected, the [center name] – [staff type name] or [staff type name] - [center name] will appear on the left side of the screen for all centers and staff types. All contact types assigned to the contact group selected will appear on the right side of the screen

Ø	Routing Assignment for Contac	t Group F	inancial Sen	vice				
F	outing Rule					I	Routing Legend	
	<ol> <li>Each Center-Staff Type of 2. Each Staff Type must har 3. Gold MUST have at least 4. Silver MUST have at least 5. Bronze MUST have at least</li> </ol>	ve the sam one PRI t one PRI	ne Routing ac		forecast Contact Gro	*	1. PRI = Primary 2. SEC1 = Secondary1 3. SEC2 = Secondary2 4. SEC3 = Secondary3 5. SEC4 = Secondary4 6. SEC5 = Secondary5	E
	•				+			÷.
	Contact Routing							
4	Staff-Center \ Call Type	Gold	Silver	Bronze	$\triangleright$			*
	FS Bronze - Urlando			PRI				
	FS Gold - Annapolis	PRI	SEC1	SEC2				-
							Save-E	xit Cancel

- Now you can indicate which contact types are handled by which staff types and in which centers
- Depending on the configuration a different value will need to be entered for single skill and multi-skill with priority
- For a multi-skill equal priority and a multi-channel configuration select from the following options from the drop-down list for each Center Staff Type that contact types route to
- Multi-skill equal priority example:



louting Rule				Routing Legend	
Each Center-Staff Type of Z. Each Staff Type must ha Reservations Chat MUST Reservations Voice MUS	ve the same Routing Thave at least one IM	across Centers 1_NP	t Contact Gro	2. INM = Multi Škill Inbound with No Pri 3. IM_NP = Instant Messaging	ority
•			•	•	•
Contact Routing					
Center-Staff \ Call Type	Reservations Chat	Reservations Voice			
Annapolis - RBP					
Annapolis - RBP Annapolis - Reservations Blended	IM_NP	INM			
	IM_NP	INM			

• Mulit-channel example:

🔞 Routing Assignment for Cont	act Group Cha	at	×
Routing Rule 1. Each Center-Staff Type 2. Each Staff Type must H 3. Chat MUST have at lea	have the same l	an only be used in one forecast Contact Gro Routing across Centers	*
•			
Contact Routing			
Center-Staff \ Call Type	Chat		•
Dallas - Casework			
Dallas - Chat	IM_NP		
Dallas - Dedicated Outbound			
Dallas - Email			Ŧ
,		Save-Exit Cancel	

• In a Multi-Skill with priority configuration select from the following options from the drop-down list for each Center - Staff Type that contact type routes to

🕼 Routing Assignment for Contact Group Tech Support	
Routing Rule 1. Each Center-Staff Type combination can only be used in one forecast Contact Gro 2. Each Staff Type must have the same Routing across Centers 3. English Tech MUST have at least one PRI 4. Spanish Tech MUST have at least one PRI	Royting Legend  1. PRI = Primary 2. SEC1 = Secondary1 3. SEC2 = Secondary2 4. SEC3 = Secondary3 5. SEC4 = Secondary4 6. SEC5 = Secondary5
< •	

• Multi-skill with priority example: MS Inbound 1 calls route to MS Agents 1 first then if there is no capacity it will route to MS Agents 2. Therefore, MS Agents 1 would be the primary routing and MS Agents 2



would be Secondary1 routing for the MS Inbound 1 calls. Since MS Inbound 2 calls only route to MS Agents 2, that routing should be configured as the primary routing for that calltype.



• Multi-skill with priority routing example:

Routing Rule					Routing Legend.	··
1. Each Center-Staff Ty 2. Each Staff Type mus 3. Gold MUST have at 4. Silver MUST have at 5. Bronze MUST have a	t have the san least one PRI least one PRI	ne Routing ad		ecast Contact Gro	2. SEC1 = Sect 3. SEC2 = Sect 4. SEC3 = Sect 5. SEC4 = Sect 6. SEC5 = Sect	ondary1 ondary2 ondary3 ondary4
•				4	+	
Contact Routing						
	Gold	Silver	Bronze			
Center-Staff \ Call Type	Gold	Silver	Bronze PRI			
Center-Staff \ Call Type Annapolis - FS Bronze	Gold PRI	Silver SEC1				
Center-Staff \ Call Type Annapolis - FS Bronze Annapolis - FS Gold			PRI			
Center-Staff \ Call Type Annapolis - FS Bronze Annapolis - FS Gold Annapolis - FS Silver Annapolis - IM/FMAII		SEC1	PRI SEC2			

- Once all contact types are routed to the appropriate center and staff types click the Save-Exit button.
- Select the next contact group and add the routing for all the contact types in that contact group.

# **Chapter 3: Data Import and Mapping**

Genesys Decisions uses 3 main data imports to populate actual history:

- Contact Data Import This includes interval level contact data such as calls answered, calls abandoned, AHT, etc. This data is typically pulled directly from the switch or a data warehouse.
- Shrinkage Import This can include scheduled and actual shrinkage activity (phone states). This data is typically pulled from a WFM software and/or the phone switch.
- Staffing Import This includes current FTE, Headcount, New Hires, Attrition and Transfers. The source for this data varies.

The import files are weekly flat files stored in a shared folder on the network. The files will need to be imported into the Admin application on a weekly basis.

The import mapping process is completed to map the data elements in the historical files to the configuration setup in Genesys Decisions. Initial data mapping will be completed as part of the implementation process. Any data elements that aren't mapped will show up during the import process. The list of values can be pulled manually from the data files.



#### **Section 1: Creating New Data Feeds**

Before import files can be imported for the first time data feeds will need to be created. This example is for importing and mapping staffing data, however this is the same process to be completed for all other import types as well (i.e. Learning, Shrinkage, etc.).

• From the main screen, select Import.



• Click the Add button in the next screen.

👁 Run E	Data Feeds			$\frown$
Run	Import Range       Import Range       New Data       Between Select a date 15   and Select a date 15	Show Mapping Issues	Expand/Collapse	Add
	Execute		History	Manage

• After selecting Add, in the Create New Data Feed screen, choose the file type you'd like to upload and give the data feed a name.

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👕 Create New Data Feed	
Select Data Adapter for the new Data Feed: Genesys PureEngage 8.5 Casework Chat Financial Cost Financial Cost - One File Financial Revenue Inbound Phone - Avaya Inbound Phone - Three File Outbound Phone Shrinkage Shrinkage - IEX CTBDepartment Export Shrinkage - IEX Management Unit Shrinkage - IEX One File Staffing Staffing Staffing - Agents in Classroom Staffing - Agents in Learning	Data Adapter Summary Staffing This is our Standard Staffing adapter. This adapter imports the following staffing statistics: Headcount, FTE, New Hires, Attrition, and Transfers. This information can be displayed to the user, is available in the Data Mart, and is a component used in Lost Time analysis. The data specification calls for 1 flat file. Because it is standard, it can work with data from any system as long as the data specification requirements are met. The imported data can be displayed in Decisions and is available in the Data Mart.
Enter the name for this data feed: Headcount Exam	ple OK Cancel

- Select OK.
- In the data source screen that appears, select Browse and navigate to the folder where your staffing files are saved.

Headcount Exam	ple
Standard H	leadcount Import Source
File path:	\\FileStorage\Import Files\Headcount
File naming pattern:	Staffing_*.txt
Data starts at row:	2
Field delimiter:	© Comma      © Pipe      © Other

• File naming pattern: Naming convention of the import file is entered here. The naming pattern entered here also needs to match the file that is being uploaded. Following the file name, the start date of the week of data being uploaded needs to be listed and separated by a underscore ( \_ ). Example:

File Naming Pattern in Decisions

**Data File Naming Convention** 

Staffing\_\*.txt

Staffing\_20160102.txt

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Agent_Data_*.txt	Agent_Data_20160102.txt
ACD_Data_*.txt	ACD_Data_20160102.txt

- Note: Text needs to be separated by an underscore, only numeric values will be accepted for the date, nothing should be entered past the asterix in the file naming pattern in Decisions.
- Data starts on row: This will always be 2.
  - Field delimiter: The strongly recommended delimiters for each data file is as follows:
    - Staffing, Learning and Classroom Comma
    - Shrinkage Pipe
    - ACD data Pipe
    - Chat Pipe
    - Outbound Pipe
    - Financials Pipe

\*Other delimiter options are available but are not recommended. If other delimiters are desired it is recommended to work with someone from Genesys Decisions to ensure proper setup.

- Once all of the fields have been populated a test can be run to ensure that the upload will work. Select Test at the bottom of the data source screen.
- After selecting test, the User will be returned with confirmation as to whether the file extractor worked correctly based upon the inputs the User provided.

Test Save	$\mathbb{D}$
===== Starting testing the Standard Headcount Import Source=====	
Found 1 file(s) to process. These files are: STAFFING_20160102.txt.	
The File Extractor is being tested using this file: C\Users\N.Arrenholz-Cooper\Documents\Uploads\STAFFING_20160102.txt.	
The File Extractor has been tested successfully.	

- The User should perform this process for all their data files (i.e. shrinkage, learning, outbound, etc.).
  - Note: If the test fails common errors may be a result of naming inconsistencies between the data file name and the File Naming Pattern, incorrect file type, incorrect file location, missing date, incorrect date format, user doesn't have read/write permissions to the folder where the files are stored, or if the user doesn't have the correct permissions set up on the database.

#### Section 2: Creating a PureEngage Data Feed

The Genesys PureEngage adapter allows users to pull historical data directly from the Genesys Info Mart or Workforce Management (WFM) database. The Decisions application pulls shrinkage historical data from the PureEngage WFM system. Decisions also pulls the center and staff mapping information from WFM using the Teams that are defined. Inbound Phone, Outbound Phone, and Chat historical data is pulled from the Genesys Info Mart aggregation tables. All of the different types of data that are extracted from the various systems are consolidated in order to provide Center, Staff, and Contact mappings.



The Decisions application can extract all of the same data and configuration from flat files that it can collect directly from the Genesys Info Mart or WFM databases. Network and database administrators can decide which will work best in their environment.

To configure the PureEngage data feed, select the "Genesys PureEngage 8.5" option from the "Create New Data Feed" window. Enter a name for the data feed, and click "OK." After saving, you will be prompted to enter information on the Configuration screen:

PureEngage				
$\odot$	PureEngage Contact Performance History			
$\odot$	Shrinkage History			
$\odot$	Agent Grouping History			

To configure the PureEngage Contact Performance History:

- Select the Data Source for your contact performance data; either "Database" or "Files"
- Populate the sections below the Data Source selection drop-down menu to configure the Database source:

PureEngage Contact Performance History					
Data Source: Database 🔻					
InfoMart Database					
Database Type: MS SQL Server 💌					
Database Server:					
Database :					
Port Number:					

• Populate the Input Source sections, as shown in the following figure, to configure the adapter to read Inbound, Outbound, and Chat history from predefined flat files, similar to the steps in Section 1:



PureEngage	Contact Performance History				
Data Source: Files	•				
Contact Input Source					
File path:	Bi	Browse	Edit Column Configuration		
File naming patte	em: Contact_*.txt				
Data starts at rov	xr: 2				
Field delimiter:	Comma Pipe Other				
<ul> <li>Agent 0</li> </ul>	Contact Input Source				
<ul> <li>Availab</li> </ul>	ele Time Input Source				
Resource	ce Input Source				
✓ Resource	Resource State Input Source				
<ul> <li>Campai</li> </ul>	Campaign Hour Input Source				
<ul> <li>Agent 0</li> </ul>	Agent Campaign Input Source				
<ul> <li>Media</li> </ul>	Type Input Source				
👻 Campai	ign Input Source				

- Click the "Test" button to ensure the application can read data from the specified data source
- Click "Save" and exit the form, or follow the instructions below to configure Shrinkage History

To configure the PureEngage Shrinkage History:

• Check the box if you would like to configure shrinkage history using the PureEngage data feed



- Select the Data Source for your shrinkage data; either "PureEngage WFM" or "Files"
- Populate the fields below the Data Source selection drop-down menu to configure the PureEngage WFM source:



PureEngage				
PureEngage Contact Performance History				
Shrinkage History				
Configure Shrinkage				
Data Source: Pure Engage WFM 🔹				
WFM API Configuration				
Host Name:				
Port Number: 8080				

• Populate the Input Source sections to configure the adapter to read shrinkage history from predefined flat files, similar to the steps in Section 1:

PureEngage	E
PureEngage Contact Performance History	
Shrinkage History	
Configure Shrinkage	
Data Source: Files 🔹	
Schedule Shrinkage Input Source	
File path: Edit Column Configuration	
File naming pattern: ScheduleShrinkage_*.txt	
Data starts at row: 2	
Field delimiter: 💿 Comma 🔘 Pipe 🔘 Other	
Activity Shrinkage Input Source	

Click the "Test" button to ensure the application can read data from the specified data source
 NOTE: During the testing, you will be asked to enter PureEngage WFM system credentials

Please enter your credentia	Is for accessing PureEngage WFM system.
User Name: Password:	
	ОК



• Click "Save" and exit the form, or follow the instructions below to configure Agent Grouping History

To configure the PureEngage Agent Grouping History:

- Select the Data Source for your agent grouping data; either "PureEngage WFM" or "Files"
- If the PureEngage WFM source is selected, the application will use the same WFM API configuration that was specified in the Shrinkage History to extract the Agent Grouping data
- Populate the Input Source section to configure the adapter to read the agent grouping history from predefined flat files, similar to the steps in Section 1:

PureEngage							
PureEngage Con	ntact Performance History						
Shrinkage Histo	Shrinkage History						
Agent Grouping	Agent Grouping History						
Data Source: Files	•						
Agent Grou	uping Input Source						
File path:	Browse Edit Column Configuration						
File naming pattern:	AgentGrouping_*.txt						
Data starts at row:	2						
Field delimiter:	Ocomma O Pipe O Other						

• Click "Save" and exit the form

#### Section 3: Importing Data

After the User has configured all of their data feeds, the next step is to import all available data and add all of the mappings for that data.

- From the Run Data Feeds screen, select New Data.
  - Note: New Data option will look in the folder where the data is stored and look at all the files that exist there, and then compare the dates in those files with the dates that have already been imported (Since at the initial setup nothing has been imported yet it will pull data from all existing files).

👁 Run Data Feeds			
Run Between Select a date 15 and Select a date 15	Show Mapping Issues	Expand/Collapse	Add

• Once, New Data has been selected, click Run.



冬 Run Data Feeds			
Import Range New Data Run Between Select a date 15 and Select a date 15	Show Mapping Issues	Expand/Collapse	Add

• After selecting Run, a progress bar will appear on the bottom of the screen.

he Data Feed is transform	ning the data	
	X Cancel	

- Note: If User selects Cancel while the data feed is uploading, it will still generate results up until the point that Cancel was selected.
- When the data has completed importing, a new screen will generate prompting the user to map their data.

#### **Section 4: Data Mapping**

After the Data Feeds are configured, the data within the files needs to be mapped accordingly, which can be done so in the following window that will generate when the user runs their data feeds. Or, the mapping screen may be accessed again by right-clicking on the Data Adaptor under Run and selecting Edit Current Mapping.





- Unmapped data will appear on the left-hand side of the screen. To select which center and staff types to map to, User must select an unmapped center and staff type for the available mapping options to appear in the center of the screen.
- To add new mapping, select an unmapped center, staff, or contact type from the left side. Choose the appropriate center, staff, or contact type from the center of the form, and then click the right-facing arrow to move the item to the mapped identifiers section
- To change the existing mapping, first "unmap" the identifier by moving it to the unmapped section, and then repeat the step above to select the appropriate Decisions identifier from the center of the form
  - Note: User may select multiple items by holding the "Ctrl" button on the keyboard and then selecting the items on the screen.





• After the center, staff, or contact types have been configured, they will be reflected on the right side of the screen and the User can select Save Changes.

staffing			
Center Mapping			
- Site Identifiers to be Mapped to Decisions Center Types		Site Identifiers Mapped to Decisions Center Types -	
Site Identifier	Search Center Types 🔎 🛶	Site Identifier Annapolis	Center Annapolis
	Annapolis Dellas	Armapons	Annapois
	Orlando		
	Outsourced		
	Unmapped		
		→	
		<del>(</del>	
		<del>,</del>	
( ) Staff Type Mapping			
Agent Group Identifiers to be Mapped to Decisions Staff Types	Decisions Staff Types	Agent Group Identifiers Mapped to Decisions Staff	Timer
Agent Group Identifier	10 H 10 H	Agent Group Identifier	Staff
	Casework	General	Sales
	Chat		
	Collections		
	Customer Service		
	Dedicated Outbound		
	Email		
	FS Bronze	$\rightarrow$	
	FS Gold		
		←	
	IM/EMAIL		
	Member Services BBP		
	RBP Reservations Blended		
	Reservations Blended Sales		
	Test Lange Bland		
Note: This reflects the currently applied mapping. To see the mapping for this run, view the Validation	Report.		Save Changes

• Once your changes have been saved, User will be returned to the Data Feeds screen and will see checkmark validation that the import and import mapping were successfully completed.



Name	Found Import Sources	Validated Import Sources	Mapped Identifiers	Imported All Sources	Validation Report
Headcount Example	$\checkmark$	$\checkmark$	$\checkmark$		<u>Details</u>

• To view the Validation Report which outlines the details of the imported data, select Details.

Name	Found Import Sources	Validated Import Sources	Mapped Identifiers	Imported All Sources	Validation Report
Headcount Example	$\checkmark$	$\checkmark$	×	$\checkmark$	Details

 Note: Although all of the green checkmarks reflect that the importing has been successful, it's critical to review the Details within the Validation Report to verify that the import has been successful and that the data is correct.

Headcount Example Validation Report										
			Executed on	12/9/2016 9:35:	00 AM <u>by</u> N.Arrei	nholz-Cooper				
Adapter Type: S	andard Head	Count								
Selected Date Range: 1/1/2016 - 12/9/2016										
Date Range Of I	mported Data	1/4/2016 - 1/4/2	016							
Data Extraction										
Data Sourc	e Extr	action Type	Ev	ent			Description			
Standard Heador Import Source	ount File		Files found		Found 1 file(s) to	o process. These	e files are: STAFI	FING_01042016.	bd.	
Center Staff Sur Decisions Identi Center	fiers	Staff	Туре	Attrition FTE	Agent Head	Agent FTE	Clerical Head	Clerical FTE	New Hires	Superviso
					Count		Count		FTE	Head Cour
Annapolis		Sales		0	143	127.1			0	
Dallas		Sales	Total	0	61 204	59.38 186.48			0	
-			Total	U	204	100.40			U	
	Grand Total 0 204 186.48 0 0 0									
			Grand Total	0	204	186.48	0	0	0	
Details of Map										
	<u>ped Identifie</u> Center Type	IS Agent Group Identifier	Grand Total Staff Type	0 Attrition FTE	204 Agent Head Count		0 Clerical Head Count	0 Clerical FTE	0 New Hires FTE	Superviso Head Cour
Site Identifier		Agent Group	Staff Type		Agent Head		Clerical Head		New Hires	Superviso
Site Identifier	Center Type	Agent Group Identifier	Staff Type Sales	Attrition FTE	Agent Head Count 143	Agent FTE	Clerical Head		New Hires FTE	Superviso

# **Chapter 4: Managing Data Feeds**

When the User is ready to begin running their data feeds on an ongoing basis, the user will have some additional options to utilize.

• All the mapped data feeds will be listed under the Run option and can be turned off or on by selecting the slide bar next to the data feed name.





• If adjustments need to be made to the data extraction parameters (i.e. where the data files are saved), the User can right-click on the Data Adaptor and select Configure Extractor(s), which will then take them back to the data source screen.

🕭 F	Run Data Feeds		
	Import Range New Data Between Select a date 15 and Select a date 15	Show Mapping Issues	Expand/Co
_	Headco     Configure Extractor(s)		Histor
	PureEng Edit Current Mapping		
	O PureEngage Data Feed - DB and files		
	PureEngage Data Feed - DB and WFM API		

- Specific date ranges can be selected in order to import data from past weeks instead of new data and vice versa.
  - To import data between a specific date range, User will select Between and then select the date range they wish to query.
  - To import all data after a specific date, User will select Between and then select a start date, but leave end date blank.
  - To import all data before a specific date, User will select Between and then select an end date, but leave the start date blank.



# **Chapter 5: Create Simulations**

#### **Section 1: Simulation Overview**

Genesys Decisions uses a patented, customized discrete-event simulation model of your contact center to drive accurate planning and analysis.

Genesys Decisions simulates expected outputs for:

- Service Level
- Average Speed of Answer
- Abandon Rate

#### Section 2: Build simulations

Simulation models will be automatically built using Contact Group and Media Type for non-multiskilling groups and Contact Type for multiskilling. The simulation will use historical data that has been imported into the database. If no data has been imported, then the model will be assigned to a default model.

• Click on 10. Build/Review Simulation(s)



• The process of building simulation models can range from 1 to 15 minutes depending on the speed of the machine and the number simulations

#### Section 3: Selecting parameters to build the models and why

- The simulation models can be built on any combination of the three service goals, Service Level, ASA and Abandon Rate. The model will try to match the historical service goals selected as closely as possible. Unless one or more of the service goals are not used at all, the recommendation is to run the initial simulation model on all 3 goals and review results. If results are not desirable, then the model can be rerun excluding the metric(s) that are not commonly reported in your Contact Center
- The number of historical weeks used to build the simulation model will default to 8 weeks. If less than 8 weeks have been imported into the database, it will only use the number or weeks available. If more than 8 weeks are available, it can be helpful to use the additional weeks when building the initial models

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• To change the default setting for the service goals and number of historical weeks used to build the simulation models just deselect any service goals that should not be included and either type over the number of weeks or select a new value from the drop-down list.

Build/Review Simulations		
Home		
Expand/Collapse Export	<ul> <li>Proposed Simulation's Predictions</li> <li>Current Simulation's Predictions</li> <li>Historical Results</li> <li>Build Simulation On</li> <li>Service Level</li> <li>ASA</li> <li>Abandon Rate</li> <li>Simulate using the late</li> <li>Service Level</li> <li>ASA</li> </ul>	
	Graph Legend Simulation Settings	Show Graphs

#### Section 4: Reviewing model accuracy

Once new models have been built, review the results and determine if any settings need to be adjusted.

- 1. To view results of the models, click on the  $\odot$  next to the contact type name
- 2. If no data has been imported for that group, you will see an icon that indicates that there is no history

. This can also mean that there is not enough history to satisfy the number of weeks selected to use.

Expa		roposed Simulation's Predictions urrent Simulation's Predictions istorical Results Graph Legend	Build Simulation On Simulate using the latest ASA Asa Abandon Rate Simulation Settings	Service Level ASA Abandon Rate Show Graphs	Block Dates	Select Groups To Run Select Groups to Run	Close
⊙ (	υ	Sales - Phone Click here to select a simulation	to apply • Curr	ently using defau	t simulation		
⊘	<b></b>	Services - Phone Click here to select a simulation	to apply • Curr	ently using defau	It simulation		
⊘		Support - IM Click here to select a simulation	to apply • Curr	ently using defau	t simulation		
⊘	Q 🖬	Tech - IM Click here to select a simulation	to apply Curr	ently using defau	It simulation		

3. Review the results of each model, the blue line on the chart represents the actual historical data, the red line is the current simulation which was created using a default model (and probably won't be very accurate) and the green line is the proposed simulation which is the new simulation that was just created using the service goals and number of historical weeks selected



4. If the proposed (green line) simulation results are satisfactory then click on the drop-down list and choose Proposed Simulation. If the proposed simulation seems to be too far from the historical (blue line), it is important to review the data sets that are being simulated to determine if there are outliners (unusual behavior) in the data that is causing the simulation to have a high standard deviation. It may be that a certain week should be excluded from the data sets being evaluated.

	0	Financial Service - Silver	Financial Service - Silver				
$\odot$	$\mathcal{A}$	Click here to select a simulation to apply	Current simulation buil				
		Proposed Simulation					
		Default Simulation					
		Borrow simulation from 'Chat - IM'					
		Borrow simulation from 'Collections - Phone'					
		Borrow simulation from 'Customer Service - Phone'					
		Borrow simulation from 'Financial Service - Bronze'					
		Borrow simulation from 'Financial Service - Gold'					
		Borrow simulation from 'Reservations - IM'					

5. To exclude certain week(s) from the data sets being evaluated, Decisions has a Blocked Dates option to exclude one or several weeks of historical data from the simulation. To block a week, select Block Dates and select the corresponding week(s) you wish to block from the dropdown list.



6. When the Build/ Review Simulations module is opened, all of the configured groups will automatically display on the screen and begin checking for a proposed simulation prediction. To run only specific groups, choose Select Groups to Run to select or deselect groups to review.

🧧 Build/Review Si	nulations									
Home										
Expand/Collapse	Export	Proposed Simulation's Predictions Current Simulation's Predictions Historical Results	Build Simulation On Service Level ASA	Simulate using the latest		Block Dates	_	Select Groups To Run		Close
expand/conapse	capore		📝 Abandon Rate		🗹 Abandon Rate			Search Groups	2	CIOSE
		Graph Legend	Simulat	tion Settings	Show Graphs	Blocked Wee	ek <mark>s  </mark>	Select All Groups in View		
		Casework - Casework						Casework - Casework	<u>^</u>	
$ \circ $ $ \circ $	Click here to select a simulati		n to apply		urrent simulation built 2/13/2015 9:05:27 AM by		Chat - IM Collections - Phone			
			112					Customer Service - Phone	E	
0		Collections - Phone						🔲 Email - Email		
$\mathbf{v}(\mathbf{r})$		Click here to select a simulatio	n to apply	- Cu	rrent simulation bu	ilt 2/13/2015 9:07	:29 AM by	Financial Service - Bronze		
								Financial Service - Gold Financial Service - Silver		
-		Customer Service - Ph	one					Recentations - IM	~	



- 7. Please note that when the new simulation is applied the results will change in your scenario files. In other words, the scenarios you use in the user application to determine staffing and forecasts will use the simulation results and will provide an output that is directly affected by the simulation chosen.
- 8. The charts that are displayed can be hidden or unhidden by selecting or deslecting the service goal(s) in the Show Graphs section
- 9. Click on the > next to the graph to display additional information about the simulation model



The export function will export a picture of the graphs that are selected in the Show Graphs section along with the additional simulation data to the right of the graphs.

Build/Review Si							
	K	Proposed Simulation's Predictions Current Simulation's Predictions	Service Level 8 • weeks of history	Service Level ASA	Block Dates 🗸 🗸	Select Grou	
Expand/Collapse	Export	Historical Results	ASA Abandon Rate	Abandon Rate			
		Graph Legend	Simulation Settings	Show Graphs	Blocked Weeks		
	Interaction Decisions						
	File name:					•	
S	ave as type:	Excel 97-2003 Workbook (*.xls)				<b></b>	
S Brow	se Folders				Save	ancel	

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# **Chapter 6: Changes/Modification**

#### Section 1: Modifying existing configuration

Depending on the modification some or all steps listed above may need to be completed

#### Section 2: Add a New Center

When adding a new center that has existing staff types in that center the following steps will need to be completed in the following order:

- Click on the Configure button to open the Configure/Review Settings window, click on 1. Add/Edit Center and follow the steps outlined in Section 2.2.1 Add a new Center
- Click on 3. Assign Staff Type to Center and follow the steps outlined in Section 2.2.3 and identify the routing by following the steps in Section 2.2.7.
- Add Center Mappings for Headcount (Learning and Classroom if using them), Shrinkage and ACD imports. See Section 3.3 Data Mapping

#### Section 3: Add a New Staff Type

When adding a new staff type to an existing Center that will be taking an existing call type(s) the following steps will need to be completed in the following order:

- Click on the Configure button to open the Configure/Review Settings window, click on 2. Add/Edit Staff Type and follow the steps outlined in Section 2.2.2 Add a new Staff Type
- Click on 3. Assign Staff Type to Center and follow the steps outlined in Section 2.2.3 and identify the routing by following the steps in Section 2.2.7.
- Add Staff Type Mappings for Headcount, (Learning and Classroom if using them) Shrinkage and ACD imports. See Section 3.3 Data Mapping

#### Section 4: Add a New Contact Type

When adding a new contact type to an existing contact group that will route to an existing staff type the following steps will need to be completed in the following order:

- Click on the Configure button to open the Configure/Review Settings window, click on 5. Add/Edit Contact Type and follow steps outlined in Section 2.2.5 Add a new Contact Type
- Click on 7. Edit Contact Routing and follow steps outlined in Section 2.2.7 Setup Routing
- Import ACD file(s), see Section 3.2 Importing Data
- Add Contact Type mappings, see Section 3.3 Data Mapping
- Create Simulation, see Section 4.2. Build Simulations



#### Section 5: Split a Center and Staff Type

When splitting out a center and staff type the following steps will need to be completed in the following order:

• Example:

	Center	Staff Type
Current Config	Phoenix	Sales
Calit out Config	Phoenix	Sales
Split out Config	Phoenix WAH	Sales WAH

- In this example the current configuration has a Phoenix center and a Sales staff type. The Phoenix center will be split out into Phoenix and Phoenix WAH and the Sales staff type will be split out into Sales and Sales WAH
- First step is to see if the data for the centers and staff types is split out already.
- Determine if the Site Id and AGI (agent group identifier) is split out in the import data files (Headcount, shrinkage and ACD)

date_stamp	Hour_of_Day	SITE_IDENTIFIER	AGENT_GROUP_IDENTIFIER
9/15/2014	1	PHX	Sales
9/15/2014	1	PHX WAH	Sales WAH

In this example the Center and Staff Type data is split out already in the ACD Import file

- If the data is not already split out there will need to be a unique identifier created for the new center and staff type in the data feed
- Decide if the original center and staff type will keep the same name or if they will be renamed
- If they will be renamed, then this can be done by clicking on 1. Add/Edit Center, finding the center name that should be changed and typing the new name over the old one. The same steps will need to be completed to change the staff type name (exception is to Click on 2. Add/Edit Staff Type)
- Add a new center and a new staff type. See Section 5.2 and Section 5.3.

#### Section 6: Split a Contact Type

When splitting a contact type into 2 contact types the following steps will need to be completed in the following order:

• Example:

	Contact Type
Current Config	Sales
Culit out Config	Premier Sales
Split out Config	Sales

• In this example the current configuration has a Sales contact type that will be split out into Sales and Premier Sales contact types.



· ·	Determine if the can dentifier is split out in the ACD import data					
	date_stamp	Hour_of_Day	SITE_IDENTIFIER	AGENT_GROUP_IDENTIFIER	CALL_IDENTIFIER	
	9/15/2014	1	PHX	Sales	Premier Sales	
	9/15/2014	1	PHX WAH	Sales WAH	Sales	

Determine if the call identifier is split out in the ACD import data

In this example the Premier Sales calls and the Sales calls are already split out in the ACD Import data file

- If there is not a unique call identifier for the new contact type, then the data will not be split out historically and therefore the simulation model will be a default model or share the existing model
- Decide if the existing contact type name will remain the same or if it will need to be changed
- If the existing contact type name will not be used, then change the contact type name by clicking on 5. Add/Edit Contact Type and entering the new name in the Name column over the old name
- Add a new contact type. See Section 5.4.

#### **Section 7: Merge Centers**

When merging two centers into one, the following steps will need to be completed in the following order:

- Determine which center will be deleted and if the remaining center will keep the existing name or will need to be renamed.
- If the remaining center will need to be renamed, click on 1. Add/Edit Center and type in the new center name over the current name
- Example:

	Center
Current Config	Dallas
Current Config	Orlando
Merge Config	Dallas

- In this example the current configuration has two centers, Dallas and Orlando. The Orlando center will be disabled and the Dallas Center will remain.
- When you disable a center, all contact types that are setup to route to a staff type in the center that is being removed will be automatically removed from routing as well.



Close	×
Name	
Annapolis	
Dallas	
Orlando	
Outsourced	
test	



Routing Rule		Routing Legend
	combination can only be used in one i ave the same Routing across Centers ast one INM	recest Contact Groi    I. HON = History Only  I. HON = Multi Skill Inbound with No Priority
•		•
Contact Routing Center-Staff \ Call Type	Sales	
Annapolis - Casework	<b>—</b>	
Annapolis - Chat		
Annapolis - Collections		
Annapolis - Customer Service		
Annapolis - Dedicated Outbound		
Annapolis - Email		
Annapolis - Email Annapolis - ES Bronze		
		✓ X

Orlando is now removed from the Routing Assignment above.





• Once a center has been unassigned, the staff associated with the center will automatically be unassigned as well

• If the Orlando data will continue to be imported but mapped to the Dallas center, see Section 3.3, Data Mapping for instructions on how to map data.

#### Section 8: Merge Staff Types

When merging two staff types into one, the following steps will need to be completed in the following order:

- Determine which staff type will be disabled and if the remaining staff type will keep the existing name or will need to be renamed.
- If the remaining staff type will need to be renamed, click on 2. Add/Edit Staff Type, type the new name over the existing staff type name.
- Highlight the staff type that is to be removed and click on the Enable/Disable button. This will remove the staff type from the configuration.
- Example:

	Staff Type
Current Config	Staff Type 1
Current Config	Staff Type 2
Merge Config	Staff Type 1



I Staff Types	
Show/Hide Disabled Staff Types	
Name	
Casework	
Chat	
Collections	
Customer Service	
Dedicated Outbound	
Email	
FS Bronze	
FS Gold	
FS Silver	
IM/EMAIL	
Member Services	
RBP	
Reservations Blended	
Sales	
Tech Support - Bilingual	
Tech Support - English	

- Similar to merging a center, as soon as the staff type has been disabled, it will be removed from Center Staff Assignment and Routing.
- Update the staff type mappings for Headcount, Shrink and ACD imports. See Section 3.3 Data Mappings

#### Section 9: Merge Contact Types

When merging two contact types into one, the following steps need to be completed in the following order:

- Determine which contact type will be disabled and if the remaining contact type will keep the existing name or will need to be renamed.
- If the remaining contact type will need to be renamed, click on 5. Add/Edit Contact Type, type the new name over the existing contact type name.
- Highlight the contact type that is to be removed and click on the Enable/Disable button. This will remove the contact type from the configuration.



how/Hide Disabled Contact Types	Add Save Enal	ble/Disable Close				
Name	Contact Group	Media Type	Service Level (%)	ASA (S)	Abandon Rate (%)	Call Priority
Bronze	Financial Service	Phone	90	15	3	
Casework	Casework	Casework	80			
Chat	Chat	IM	80	15	3	
Coll Inbound	Collections	Phone	80	15	3	
Coll Outbound	Collections	Outbound				
Customer Service	Customer Service	Phone	80	5	3	
Email	Email	Email	80			
English Tech	Tech Support	Phone	70	25	5	
Gold	Financial Service	Phone	90	10	2	
OB Activation	Customer Service	Outbound				
OB Customer Survey	Outbound	Outbound				
Reservations Chat	Reservations	IM	80	15	3	
Reservations Voice	Reservations	Phone	80	15	3	
Sales	Sales	Phone	80	15	3	
Services	Services	Phone	80	15	3	
Silver	Financial Service	Phone	90	15	3	
Spanish Tech	Tech Support	Phone	70	25	5	

- Similar to merging a center, as soon as the contact type has been disabled, it will be removed from all assignments.
- Import merged ACD data, see Section 3.2 Importing Data
- Update the contact type mapping, see Section 3.3 Data Mappings
- Build new simulation model, see Section 4.2 Build Simulations

# **Chapter 7: Chapter Customize Metrics Decimal**

#### **Section 1: Overview**

The Customize Metrics Decimal feature allows you to edit the number of decimal places for each individual metric that is displayed within the Genesys Decisions user application. This includes any of the modules as well as the main grid, reports, etc.

• In the admin application, navigate to Customize Metrics Decimal under Settings.


Import	Settings	Help	
A Import	Cus	figure tomize Metrics Decimal ional Metrics	Ctrl+F
	Dat	a Mart	

- Expand the metric group to expose the metric that you want to change the number of decimal places displayed.
- Double-click in the corresponding cell in the column No. of Decimal Places. Here, input a value according to the number of decimal places to be displayed. Note that "1" is tenths, "2" is hundredths, "3" is thousandths, etc. To display no decimal places, add a zero into the value for the metric.

Image: Metrics Decimal Settings       Image: Decimal Settings	
Search Field	
Fields	No. of Decimal Places
Agents	
Agent Shrinkage	
Staff Totals	
Inbound Staffed Agents [FTE]	1
Total Staffed Agents [FTE]	1
Agent Workstations Required	0
Clerical Staff [FTE]	2
Clerical Headcount	0
Supervisors [FTE]	1
Supervisor Headcount	0
Avg. Agent, Supv. and Clerical Staff [FTE]	1
Share of Staffed Agents on Outbound [%]	1
Outbound Staffed Agents [FTE]	1
Share of Staffed Agents on Email [%]	1
IM Staffed Agents [FTE]	1
Email Staffed Agents [FTE]	1
Share of Staffed Agents on IM [%]	1
Share of Staffed Agents on Casework [%]	1
Share of Staffed Agents on Inbound [%]	1
Casework Staffed Agents [FTE]	1
Agent Efficiency	
Inbound Contacts	
Inbound Service Quality	
Per Contact Financials	

• To find a specific metric, use the search field to type a whole or partial metric name, which will then display the results.



Metrics Decimal Settings	
Print Export Close	
Search Field Staff	
Fields	No. of Decimal Places
+ Agents	No. of Decimal Places
Staff Totals	
Inbound Staffed Agents (FTE)	1
Total Staffed Agents [FTE]	1
Agent Workstations Required	0
Clerical Staff [FTE]	2
Clerical Headcount	0
Supervisors [FTE]	1
Supervisor Headcount	0
Avg. Agent, Supv. and Clerical Staff [FTE]	1
Share of Staffed Agents on Outbound [%]	1
Outbound Staffed Agents [FTE]	1
Share of Staffed Agents on Email [%]	1
IM Staffed Agents [FTE]	1
Email Staffed Agents [FTE]	1
Share of Staffed Agents on IM [%]	1
Share of Staffed Agents on Casework [%]	1
Share of Staffed Agents on Inbound [%]	1
Casework Staffed Agents [FTE]	1
Agent Efficiency	
Contacts per Paid Hour	1
Staffed Time Per Contact [Sec]	2
Occupied Time to Paid Time	1
Occupied Time to Staffed Time	1
Staffed Time to Paid Time	1
Staffed Time to Worked Time	1
Worked Time to Paid Time	1
Contacts per Worked Hour	1
Occupied Time to Worked Time	1

## • To apply the setting changes, click on the Update button with the green checkmark and close.



📀 Metrics Decimal Settings			×
Print Export Close			
Search <u>F</u> ield Staff			
Fields	No. of Decima	I Places	^
Agents			
Agent Shrinkage			
Staff Totals			
Agent Efficiency			
Inbound Contacts			
Inbound Service Quality			<b>~</b>
	odate	× <u>C</u> ancel	

# **Chapter 8: Optional Metrics**

#### **Section 1: Overview**

Optional Metrics is a module that can be enabled within Genesys Decisions that allows up to 10 additional input metrics to display in the main grid of the user application. Please note only future data can be manually entered in the Optional Metrics category of the main grid of the user application. Data cannot be mapped or imported to Optional Metrics.

• In the admin application, navigate to Optional Metrics under Settings.

Import	Settings Help		
A Import	Configure Customize Metrics Decimal Optional Metrics Data Mart	Ctrl+F	

- User must ensure Enable Optional Metrics is selected before this area can be configured. Once selected, User can enter the following:
  - Category Heading This will be title of the collapsible customized metrics category in the main grid of the user application.
  - Metric Name Name of the specific customized metric the user wishes to have displayed in the customized metric section in the main grid of the user application.
  - Is Visible Selecting/ deselecting will make the specific customized metric visible or not within the main grid of the user application.
  - Tooltip Text When user's cursor hovers over the name of the customized metric in the main grid of the user application, this is the customized text that will appear. This is usually a definition of what the metric is, how it is calculated, etc.



- Row/ Column Summary Method For reporting purposes, allows user to select Average, Sum, or Weight Average as the summary method to be used in the user reporting section.
- Row/ Column Weight Avg Detail Will be disabled unless Weight Average is selected in the appropriate summary method column. Once Weight Average has been selected, user can click in the column for a list of metrics they would like to weight average on.
- When data entry is complete, select OK before closing the data entry window. These optional metrics will now be displayed below the Service Quality metrics under the user defined category heading you selected. If the Enable Optional check box is not checked no optional metrics will display on the main grid.

Category Heading	Customer	Experience				
Metric Name	Is Visible	Tooltip Text	Row Summary Method	Row Weight Avg Detail	Column Summary Method	Column Weight Avg Detail
Net Promoter Score	<b>V</b>	Customer experience score	Weight Average	Contact Type Total: Calls Handled	Weight Average	Contact Type Total: Calls Handled
Agent Quality	<b>V</b>	Agent quality assurance score	Average		Average	
Customer Satisfaction	<b>V</b>	OSAT	Sum 👻		Sum	
Optional Metric 4		Available optional metric	Sum		Sum	
OM5		test	Weight Average	Agent SCH	Sum	
test		Customer Experience Metric 6	Sum		Weight Average	Agent Total Wages [C]
ОМ7		Customer Experience Metric 7	Sum		Sum	
OM8		Customer Experience Metric 8	Weight Average	Agent Total Wages and Pay [C]	Sum	
ОМ9		Customer Experience Metric 9	Sum		Sum	
test		test	Sum		Sum	

# **Chapter 9: Decisions Data Mart**

### **Section 1: Overview**

The Decisions Data Mart is a separate database from the Decisions database. It has an open schema and is available for use with any reporting/BI tool outside of the Decisions application. Imported history is synchronized with the Data Mart so that the latest history is always available for reporting. Users can publish their scenarios to the Data Mart for easy reporting across multiple scenarios as well as history.

There are two roles built into the Decisions Data Mart. To access Data Mart, a user must be in one of the roles.

DataMart Admins

- Data Mart Administrators can enable/disable Data Mart Security, add/delete users and can share any Folder with any user.
- To be a Data Mart Administrator, the SQL user must be assigned the DataMartAdmins database role.
- A user that is only a member of the DataMartAdmins database role does not have access to the actual data inside the Data Mart, they will not be able to report on the data. A member of the DataMartAdmins database role only has access to those artifacts needed to perform administrative tasks.



DataMart Users

- Data Mart Users are those users who either need to publish data to the Data Mart from the Genesys Decisions application, or report on data from the Data Mart.
- To be a Data Mart User, the SQL user must be assigned the DataMartUsers database role.

#### Section 2: Configure Data Mart

Once you are logged in to the Admin Application, click on the Data Mart button to open Data Mart window and perform the following tasks in order.



You can also configure Data Mart from the Settings menu above the icons:

Import	Settings Help	
A Import	Configure Ctrl+F Customize Metrics Decimal Optional Metrics	
4	Data Mart	

#### **Section 3: Security Settings**

#### Enable/Disable Security

Security for the Data Mart can be enabled or disabled by a Data Mart Administrator. Security is disabled by default.



🧕 Mana	ige Data Mart	
	nable Data Mart Security What is Data Mart Security?	
Use	r Management	
	Enter New User Name	Add
Fold	ler Permission Management	
	Manage Folder Permissions	
		Close

- With Data Mart Security disabled:
  - Every user who has the DataMartUsers role in the Data Mart database can access (view, publish, delete) the data in the Decisions Data Mart
  - $\circ \quad \ \ {\rm Only \ the \ Public \ folders \ are \ available.}$
  - Data Mart Explorer will not be available in Admin application
- With Data Mart Security enabled:
  - Users must be added to the Data Mart by an Administrator to access the data in Decisions Data Mart
  - A Data Mart Administrator can add users to the Data Mart and allow them permission to publish to or report from the Data Mart through the Manage Data Mart Interface.
  - The Public folders are still available
  - o Each user will have a folder in the Home folder, this is private to the specific user
  - User Home folders can be shared with other Data Mart users

#### Section 4: Adding a Data Mart User (Only when security is enabled)

For a user to be able to publish a scenario to the Data Mart, they must have their account added to the Data Mart. This account is the Windows Login that they user when they access the Decisions application. It is not the user name that they type in on the login screen for the Decisions application.



For users who need to report on the data and will not publish, they need to have their account added as well. This could be their Windows Login or their SQL login; it depends on how they will be accessing the data in the Data Mart.

Add New Data Mart User:

- In the Text Box show below enter the username of the new user and then click Add.
- The user name that gets entered should be either a Windows login or a SQL login.

💐 Manage Data Mart	- • ×
Enable Data Mart Security What is Data Mart Security?	
User Management	
1	Add
x user1 x user2 x user3	
Folder Permission Management	
	Close

#### Section 5: Delete a Data Mart User (Only when security is enabled)

Delete Users:

- Click on <sup>×</sup> in front of the user's name.
- All empty folders will be deleted.
- If data has been published to the folder you will be prompted to select another user to manage this folder. This is done to ensure data is not lost when users are deleted.



💐 Manage Data Mart	- • •
Enable Data Mart Security <u>What is Data Mart Security?</u>	
User Management	
Enter New User Name	Add
The user has been removed successfully. Because the removed user's home folder contains data, it has been renamed to <b>bbdt\macke-Terminated@2017-09-27</b> <b>16:51:26.403</b> to preserve the data.	
Please select a Data Mart user to manage this folder a its data.	nd
user1 user2 user3	
Assign	
Folder Permission Management	—
	Close

## Section 6: Data Mart Explorer

• Click Manage Folder Permissions and the Data Mart Explorer will open



(	
💐 Manage Data Mart	
Enable Data Mart Security <u>What is Data Mart Security?</u>	
User Management	
	Add
X user1 X user2 X user3	
Folder Permission Management	
Manage Folder Permissions	
	Close

Data Mart Explorer displays the hierarchical structure of folders on your Data Mart. (Shown below)
 Data Mart Explorer is also found in the User application.



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## Section 7: Folder Hierarchy

Folder Hierarchy:

•

- Root folder
  - Contains home, public and synchronization folders.
  - Home folder (Only displays if Security is enabled)
    - Separate folder under home for each user
      - Scenarios can be published to these folders
- Public Folder
  - Every user who has the DataMartUsers role in the Data Mart database can access
  - Scenarios can be published to these folders
- Synchronization
  - Contains the historical data and configuration information that has been synchronized from the Decisions database

## **Section 8: Share Folder Options**

Right click on the user folder in the Data Mart Explorer and select Share Folder.

root		Name	<ul> <li>Created</li> </ul>	Created by	
in home					
🚞 user! 🚞 user!	Paste				
늘 useri	Share Folder				
늘 Public	Delete				
늘 Synchro	New Folder				
	Rename				
	Refresh				

Type a name and then click Add, or click the arrow to find someone. (Drop down includes a list of Data Mart Users)



A Share	e Folder - bbdt\macke-Terminated@a	2017-09-27 16:51:26.403 📃 🔳 💌				
	Choose Data Mart users to share the Data Mart folder with Type a name and then click Add, or click the arrow to find someone.					
		▼ Add				
	Name	Permission Level				
	user1	Publish/Report 🔻				
Ineed	d help with setting permissions	Share Cancel				

- Modify permission levels by clicking the down arrow to generate a drop menu with options to
  - o Report
  - Publish Report
  - Manage/Publish Report
  - Remove the users' permission level.

🕾 Share	Folder - bbdt\macke-Terminated@2	2017-09-27 16:51:2	26.40	3	
	Choose Data Mart users to shar Type a name and then click Add, or click				
			•	Add	
	Name	Permission Leve	Permission Level		
	user1	Publish/Report 🔻			
			~	Report Publish/Repo Manage/Pub	
				Remove	
I need help with setting permissions Share Cancel					

#### **Section 9: Permission Levels:**

• Report – allows a user to select data from available data sources.



- Publish/Report allows a user to Publish data to a Data Source, create/delete/rename or cut/copy a data source in addition to everything in the Report permission
- Manage/Publish/Report allows a user to create/delete/rename or cut/copy a Folder in addition to everything in the Publish/Report permission.

#### Section 10: Data Mart FAQs

- What happens if a user leaves the company?
  - If security is turned off, there is nothing that you need to do. If security is turned on, then you can delete the user from the Data Mart from the Manage Data Mart function in Decisions Admin. If the user had published any data to their home folder, you will be prompted to assign another user as the manager of the folder. This allows for continuity by allowing other users to publish report or modify content from the employee that is no longer with the company.
    - Please reference: 7.3.2 Adding/Deleting a Data Mart User (Only when security is enabled)
- What happens when a user is on vacation and another user needs to access the data in their private home folder?
  - As an Admin, you can grant permissions on any folder. You can use the Data Mart Explorer to find the appropriate folder and then add the required permissions through the Folder Sharing function.
    - Please reference: 7.3.5 Share Folder Options
- What happens if you disable security?
  - When security is disabled, the home folders are no longer accessible to anyone. The Public area is still available. The best practice here is to have the users check to see if there is any data in their home folders that they would want to retain. They can move or copy the data into the Public area so that it will still be available after security is turned off.
    - Please reference: 7.3.1 Enable/Disable Security

# **Chapter 10: Genesys Decisions Terminology**

Center	Physical location of your centers, groupings of agents by location				
Staff Type	Group of agents				
Contact Type	A grouping of call, email, chat or casework volume				
Contact Group	Group of contact types				
Scenario	Planning file				
Actual History	Actual historical values imported into the database from the Admin application				
Scenario History	Archived planning file data				
Data Mart Data Source	A published scenario in Decisions.				
Data Feed	A stream of structured customer data that can be imported into the Decisions application				

