Genesys Decisions

Genesys Decisions

Administration Guide 8.5

GENESYS™

About Genesys

Genesys® powers more than 25 billion of the world's best customer experiences each year. Our success comes from connecting employee and customer conversations on any channel, every day. Over 10,000 companies in more than 100 countries trust our #1 customer experience platform to drive great business outcomes and create lasting relationships. Combining the best of technology and human ingenuity, we build solutions that mirror natural communication and work the way you think. Our industry-leading solutions foster true omnichannel engagement because they perform equally well across channels, on-premise and in the cloud. Experience communication as it should be: fluid, instinctive and profoundly empowering. Visit genesys.com on Twitter, Facebook, YouTube, LinkedIn and the Genesys blog.

Notice

Although reasonable effort is made to ensure that the information in this document is complete and accurate at the time of release, Genesys Telecommunications Laboratories, Inc. cannot assume responsibility for any existing errors. Changes and/or corrections to the information contained in this document may be incorporated in future versions.

Your Responsibility for Your System's Security

You are responsible for the security of your system. Product administration to prevent unauthorized use is your responsibility. Your system administrator should read all documents provided with this product to fully understand the features available that reduce your risk of incurring charges for unlicensed use of Genesys products.

Trademarks

Technical Support from VARs

If you have purchased support from a value-added reseller (VAR), please contact the VAR for technical support.

Ordering and Licensing Information

Complete information on ordering and licensing Genesys products can be found in the [Genesys Licensing Guide].

Released by: Genesys Telecommunications Laboratories, Inc. http://www.genesys.com/

Document Version: 85dec_ad_11-2017_v8.5.102.00

Table of Contents

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?

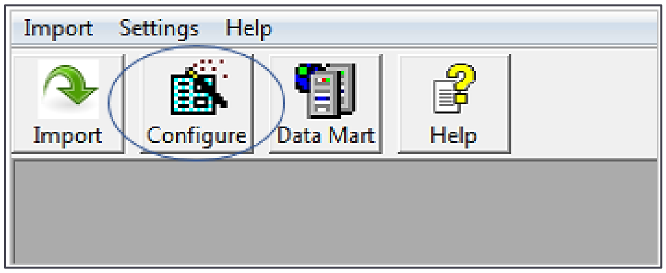
Genesys Decisions offers multiple configuration options to fit any contact center organization. The configuration can include any or all the below:

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

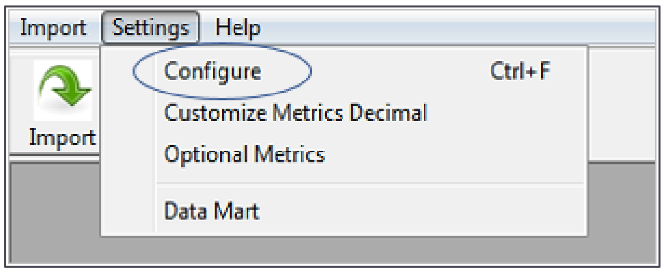
A configuration can be set up as Multi-Channel for Inbound Phone, Outbound Phone, Chat, Email and Casework. A configuration can be set up as Multi-Skill with Priority for Inbound Phone and Outbound Phone.

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.



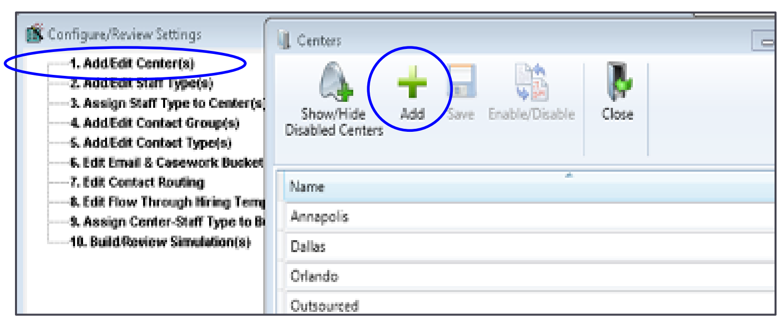
You can also configure the Admin application by using the menus above the icons:



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

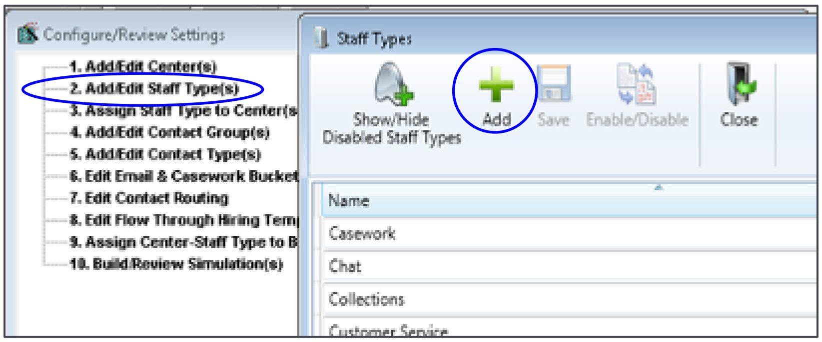


- A blank cell will be created in the table
- In the blank cell, add the new center name in the name column
- Continue performing the previous 3 steps until all desired centers are added
- Click the Save button and close the window by clicking on the X at the top right corner or by clicking on the Close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

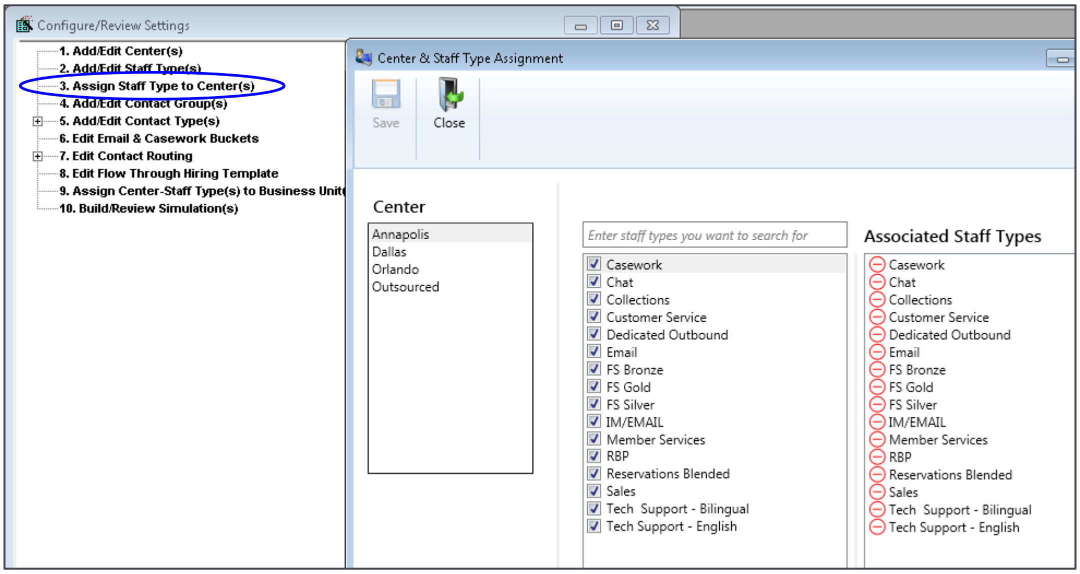


- A blank cell will be created in the table
- In the blank cell, add the new staff type name in the name column
- Continue performing the previous 3 steps until all new staff types are added
- Click the Save button and close the window by clicking on the X at the top right corner or by clicking on the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

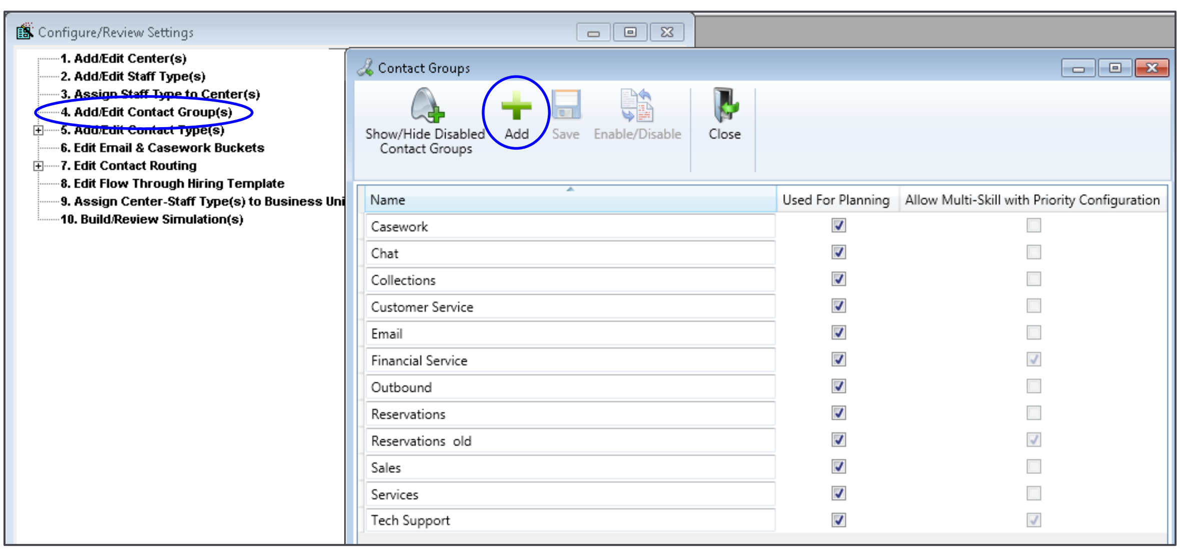


- Select the next center from the list and perform the same steps
- Once all the staff types have been assigned to the appropriate centers, close the window by clicking on the close icon. You can also click the save button at any time to save your current changes.

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



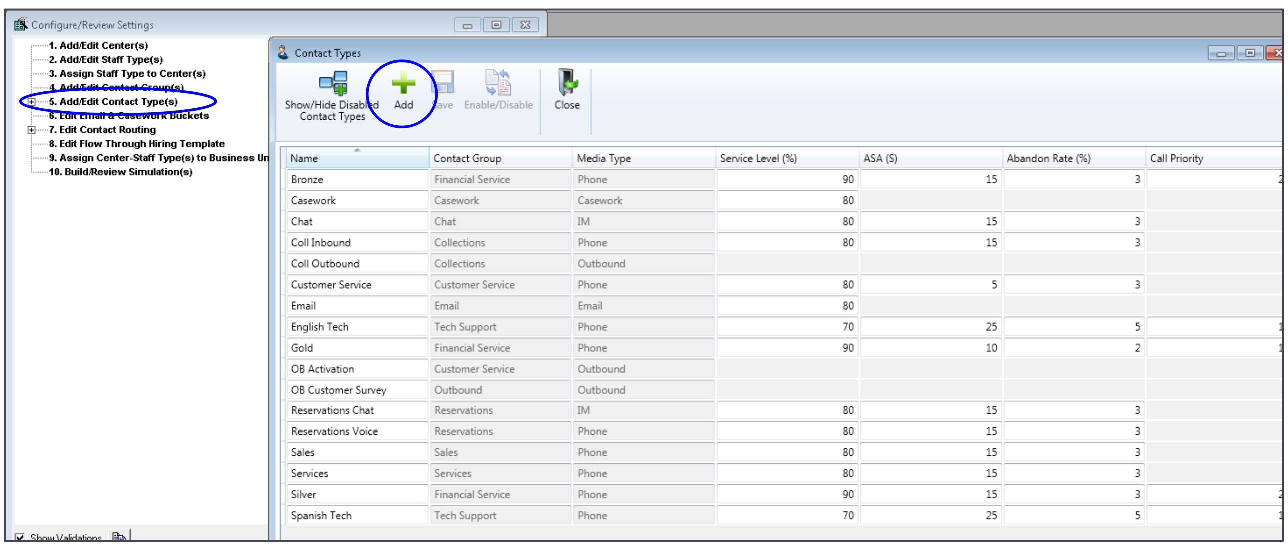
- A blank line will be created in the table

- 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

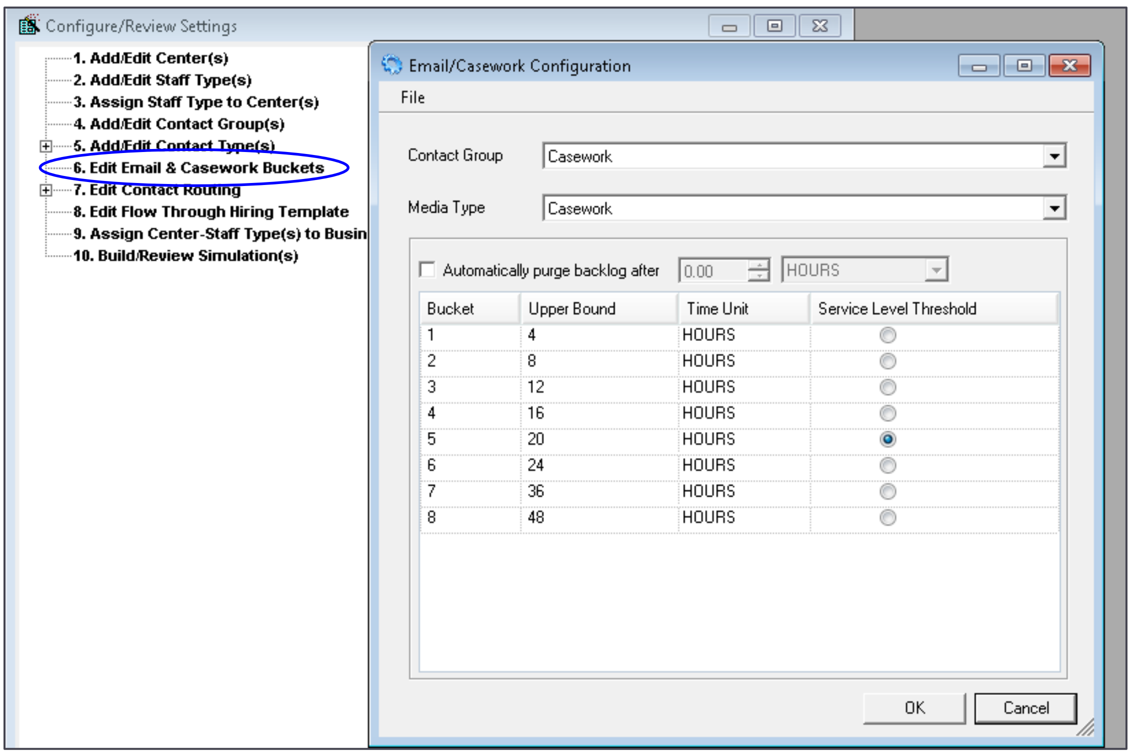


- A blank line will be created in the table
- Perform the following steps:
  - Enter the new contact type name in the Name column
  - Select the appropriate contact group from the drop-down list
  - Select the appropriate media type from the drop-down list
  - Enter the SVL, ASA, Abandon Rate, Max Extra 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

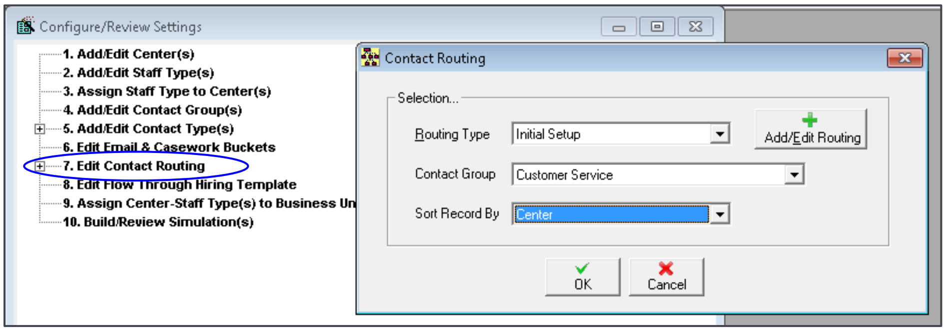


- Select either Hours or Days from the Time Unit drop down list
- In the Upper Bound column enter in the number of hours or days for each bucket
- Click the radio button in the Service Level Threshold column to select the service level goal for the contact type
- Click the Save button and close the window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

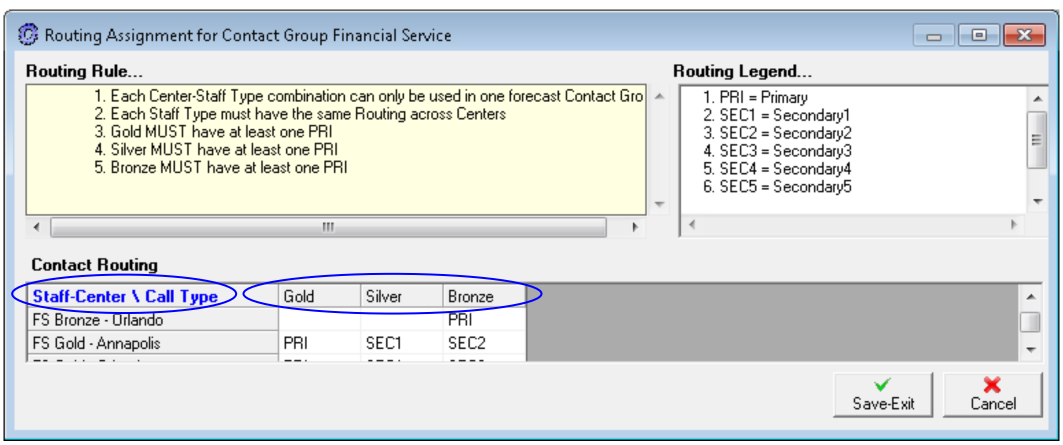
Section 9: Set up Routing

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.

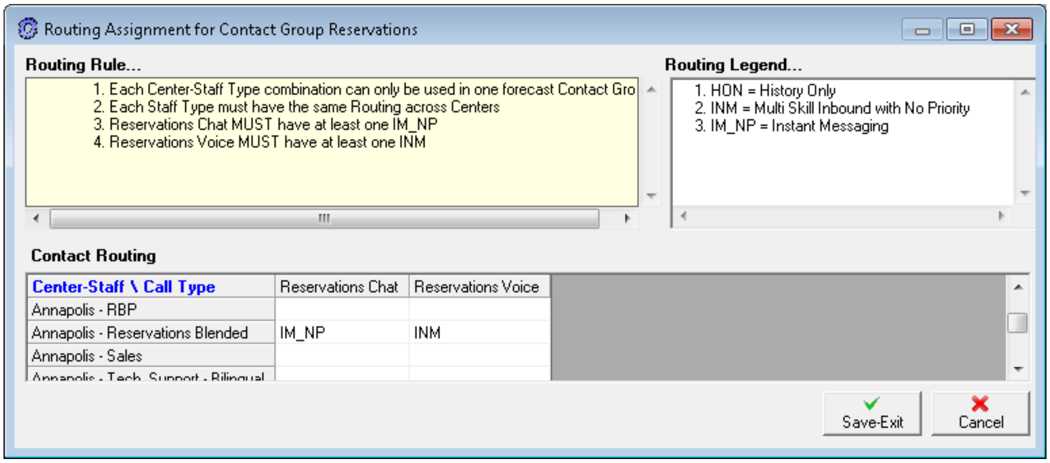
- Click on 7. Edit Contact Routing
- The Routing Type will default to Initial Setup
- Select the Contact Group from the drop-down list
- Sort by either Center or Staff Type and click OK



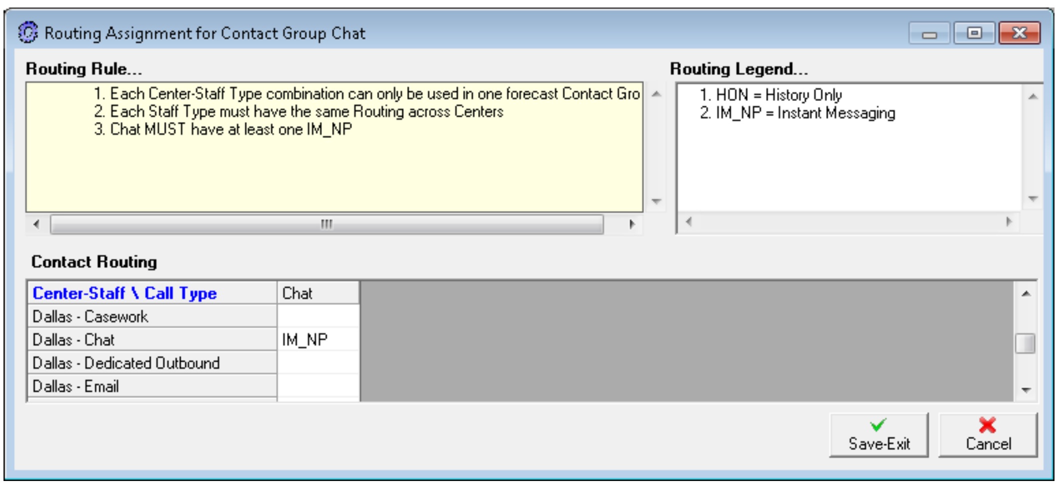
- Depending on the sort method selected, the [center name] – [staff type name] or [staff type name] - [center name] will appear on the left side of the screen for all centers and staff types. All contact types assigned to the contact group selected will appear on the right side of the screen



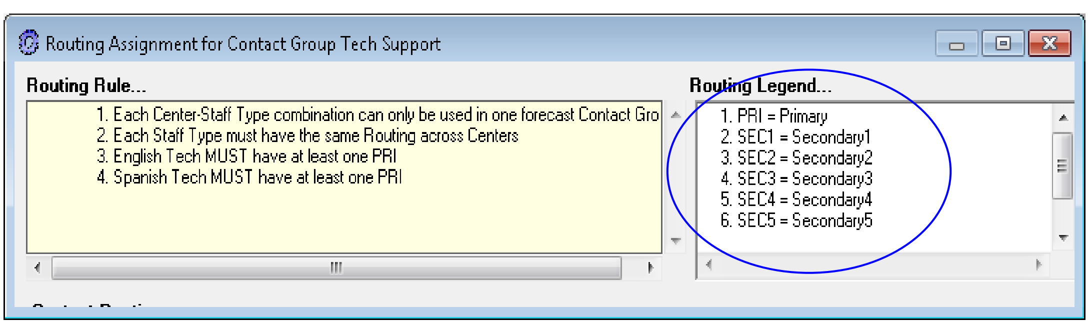
- Now you can indicate which contact types are handled by which staff types and in which centers
- Depending on the configuration a different value will need to be entered for single skill and multi-skill with priority
- For a multi-skill equal priority and a multi-channel configuration select from the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



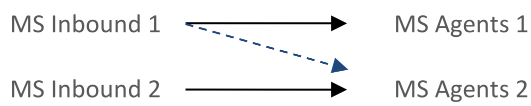
- Mulit-channel example:



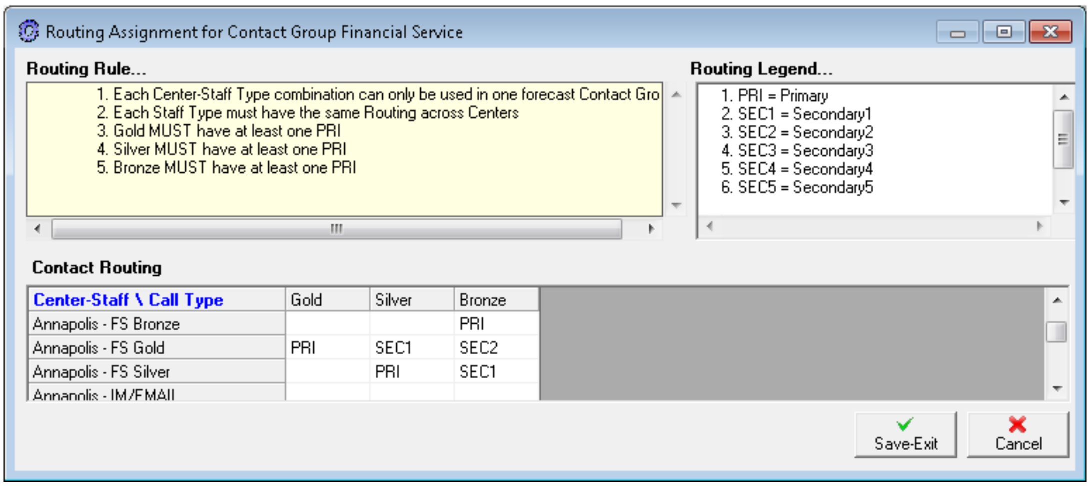
- In a Multi-Skill with priority configuration select from the following options from the drop-down list for each Center - Staff Type that contact type routes to



- 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:



- 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.

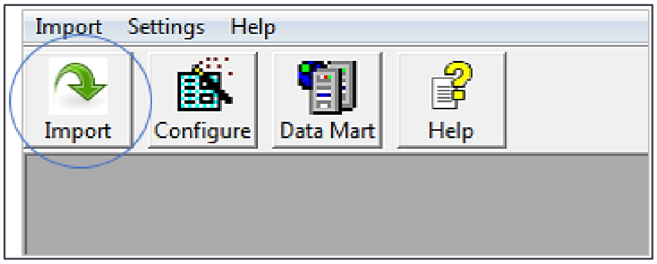
The import files are weekly flat files stored in a shared folder on the network. The files will need to be imported into the Admin application on a weekly basis.

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.

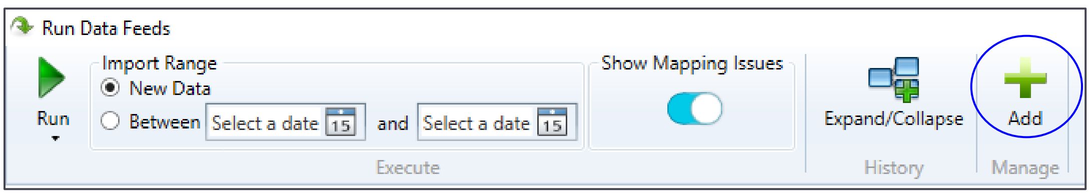
Section 1: Creating New Data Feeds

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.).

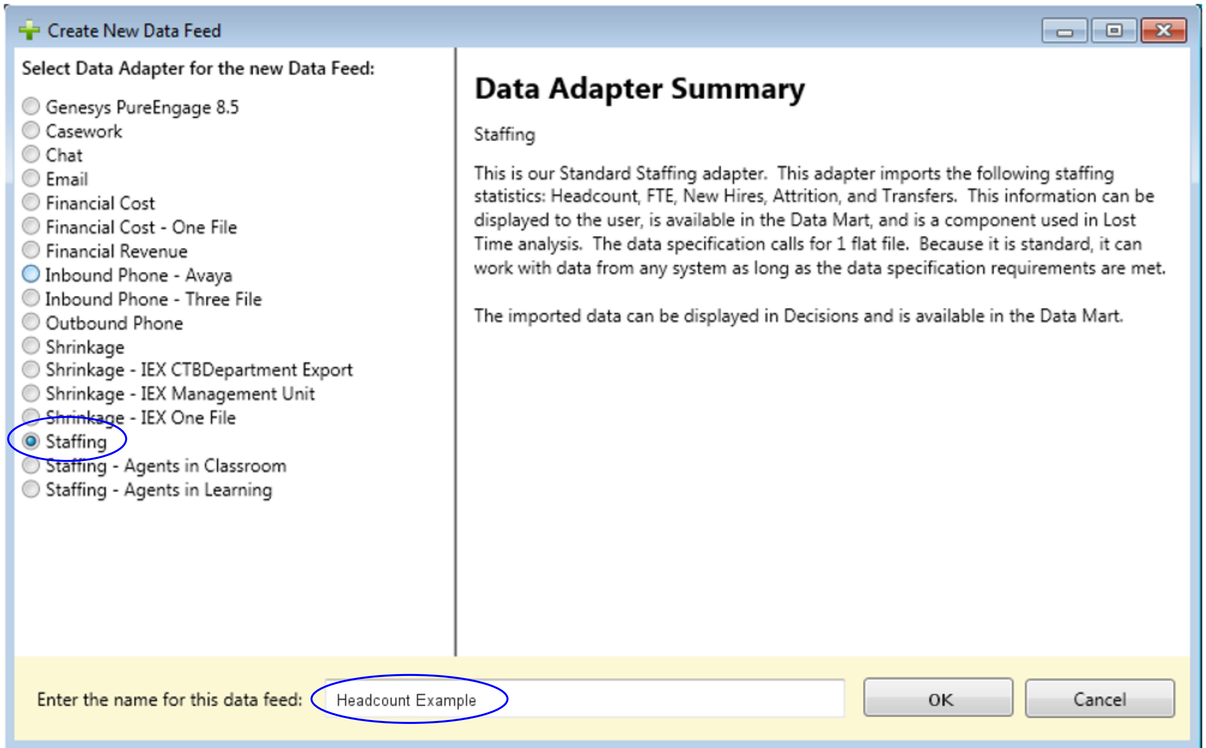
- From the main screen, select Import.



- Click the Add button in the next screen.

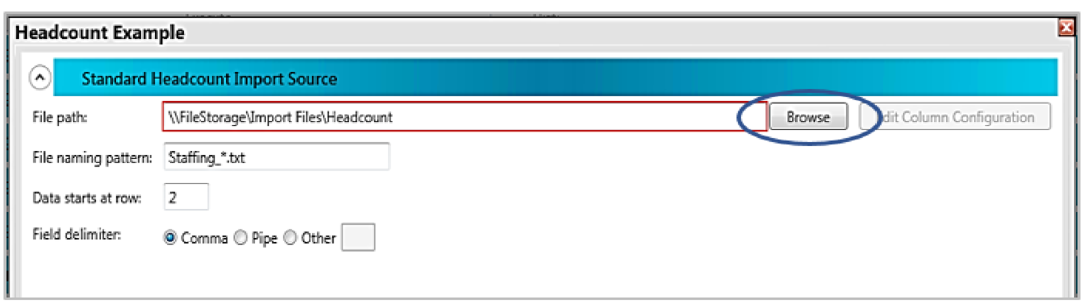


- After selecting Add, in the Create New Data Feed screen, choose the file type you'd like to upload and give the data feed a name.



- Select OK.

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



- 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

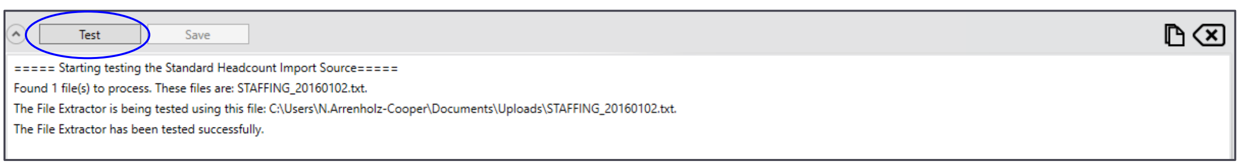
Agent_Data_*.txt	Agent_Data_20160102.txt
ACD_Data_*.txt	ACD_Data_20160102.txt

- 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.



- 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

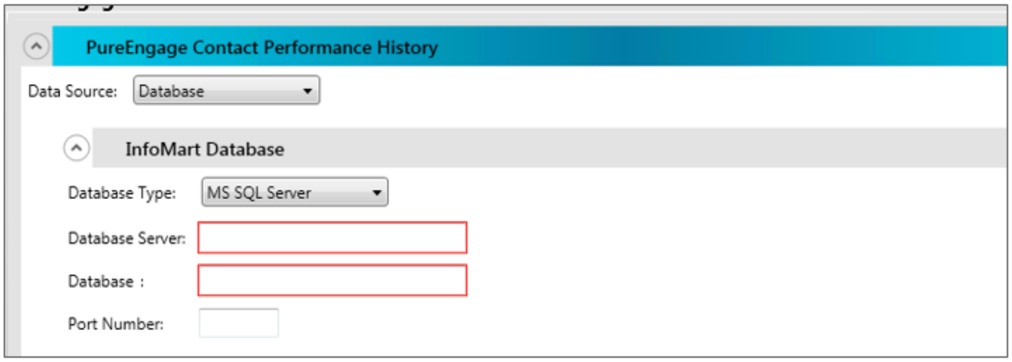
The Genesys PureEngage adapter allows users to pull historical data directly from the Genesys Info Mart or Workforce Management (WFM) database. The Decisions application pulls shrinkage historical data from the PureEngage WFM system. Decisions also pulls the center and staff mapping information from 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.

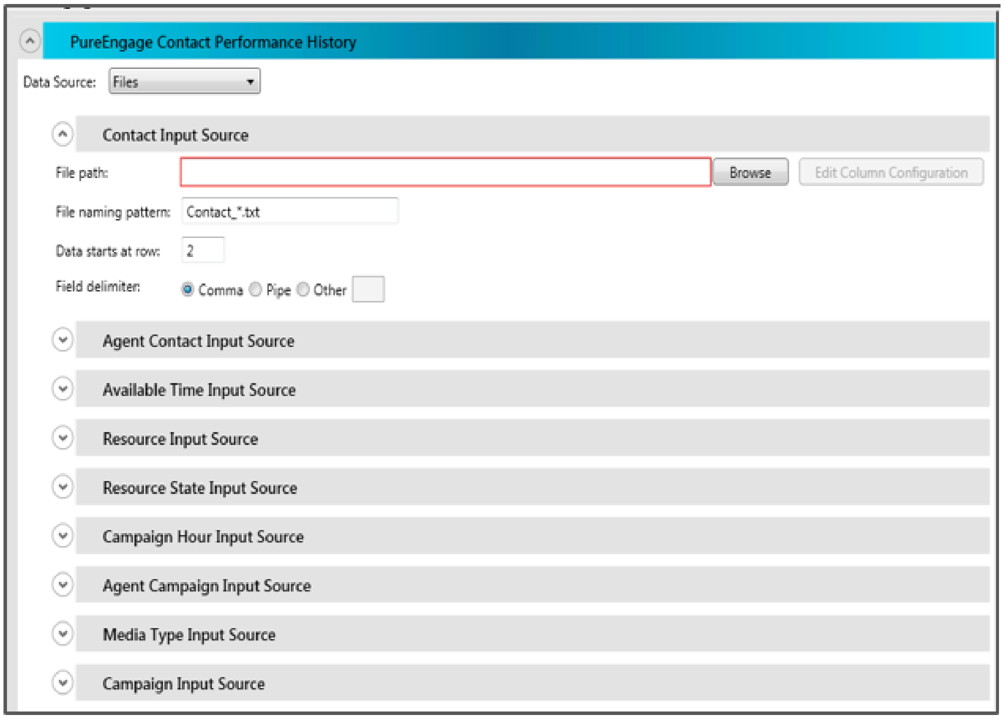
To configure the PureEngage data feed, select the “Genesys PureEngage 8.5” option from the “Create New Data Feed” window. Enter a name for the data feed, and click “OK.” After saving, you will be prompted to enter information on the Configuration screen:

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:



- 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:

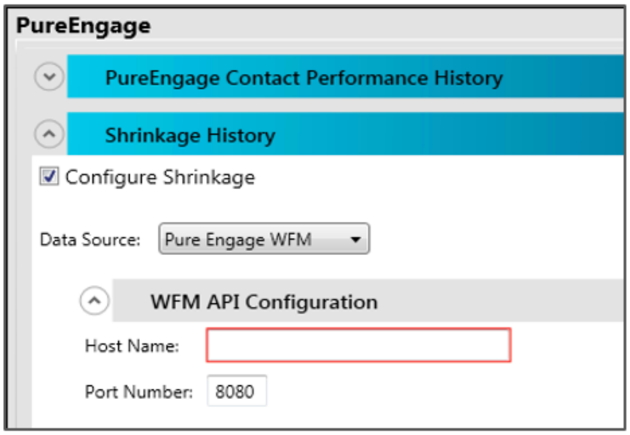


- Click the “Test” button to ensure the application can read data from the specified data source
- Click “Save” and exit the form, or follow the instructions below to configure Shrinkage History

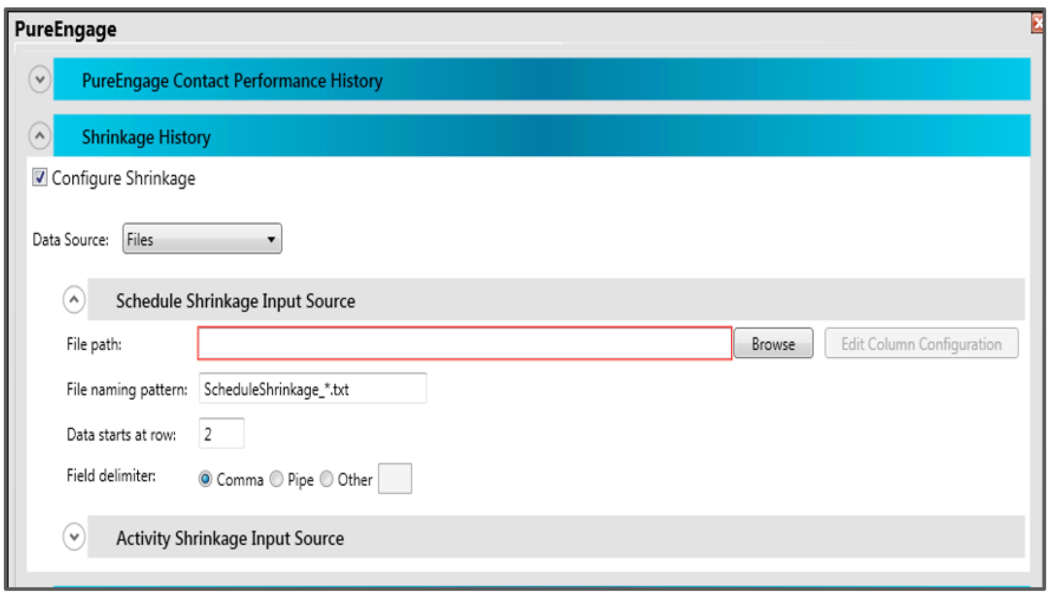
To configure the PureEngage Shrinkage History:

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

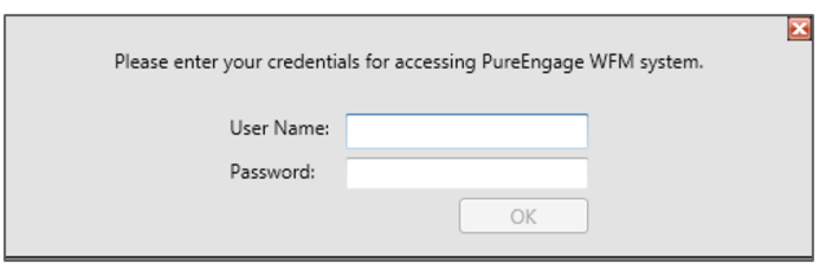
- Select the Data Source for your shrinkage data; either “PureEngage WFM” or “Files”
- Populate the fields below the Data Source selection drop-down menu to configure the PureEngage WFM source:



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

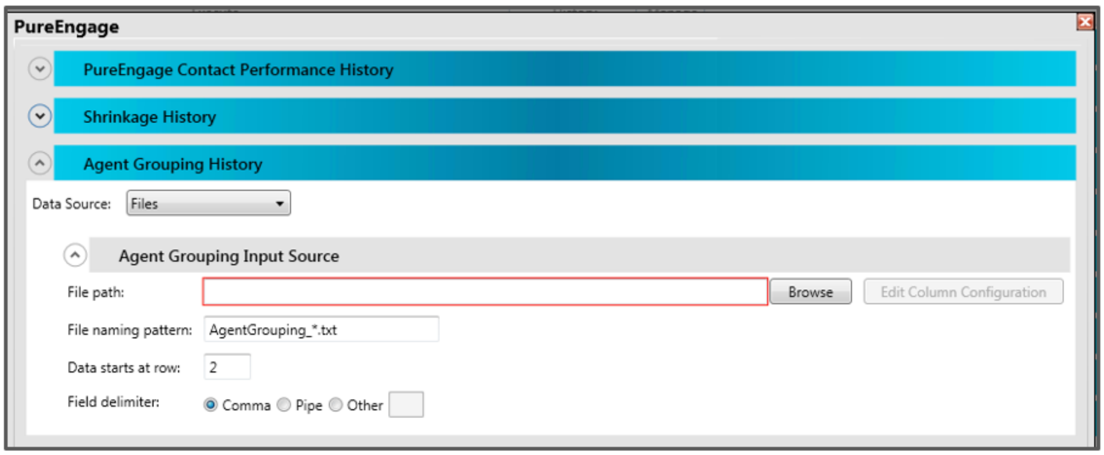


- Click the “Test” button to ensure the application can read data from the specified data source
    - NOTE: During the testing, you will be asked to enter PureEngage WFM system credentials



- 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:

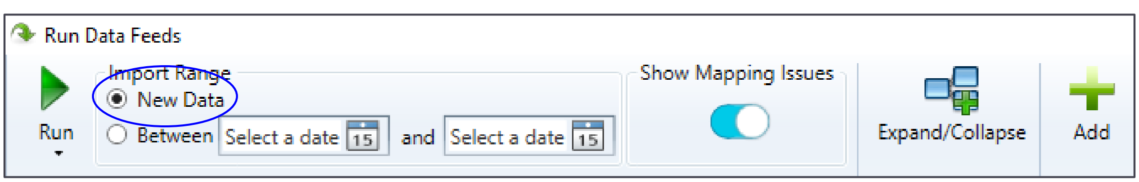


- Click “Save” and exit the form

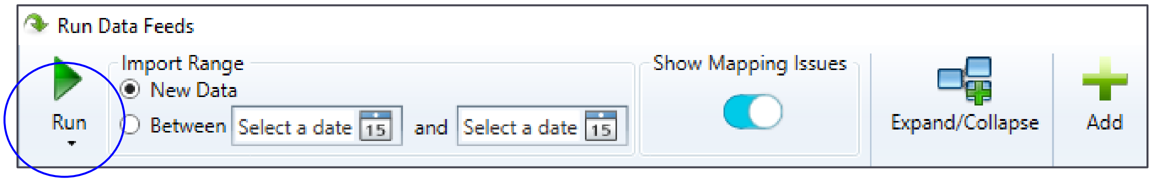
Section 3: Importing Data

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.

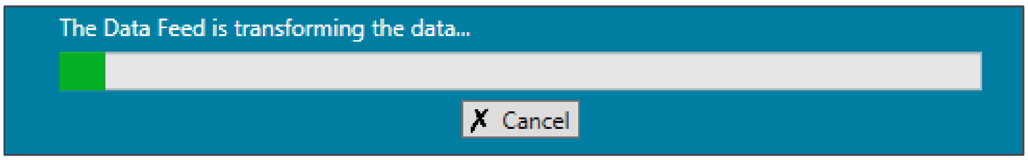
- From the Run Data Feeds screen, select New Data.
    - Note: New Data option will look in the folder where the data is stored and look at all the files that exist there, and then compare the dates in those files with the dates that have already been imported (Since at the initial setup nothing has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



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



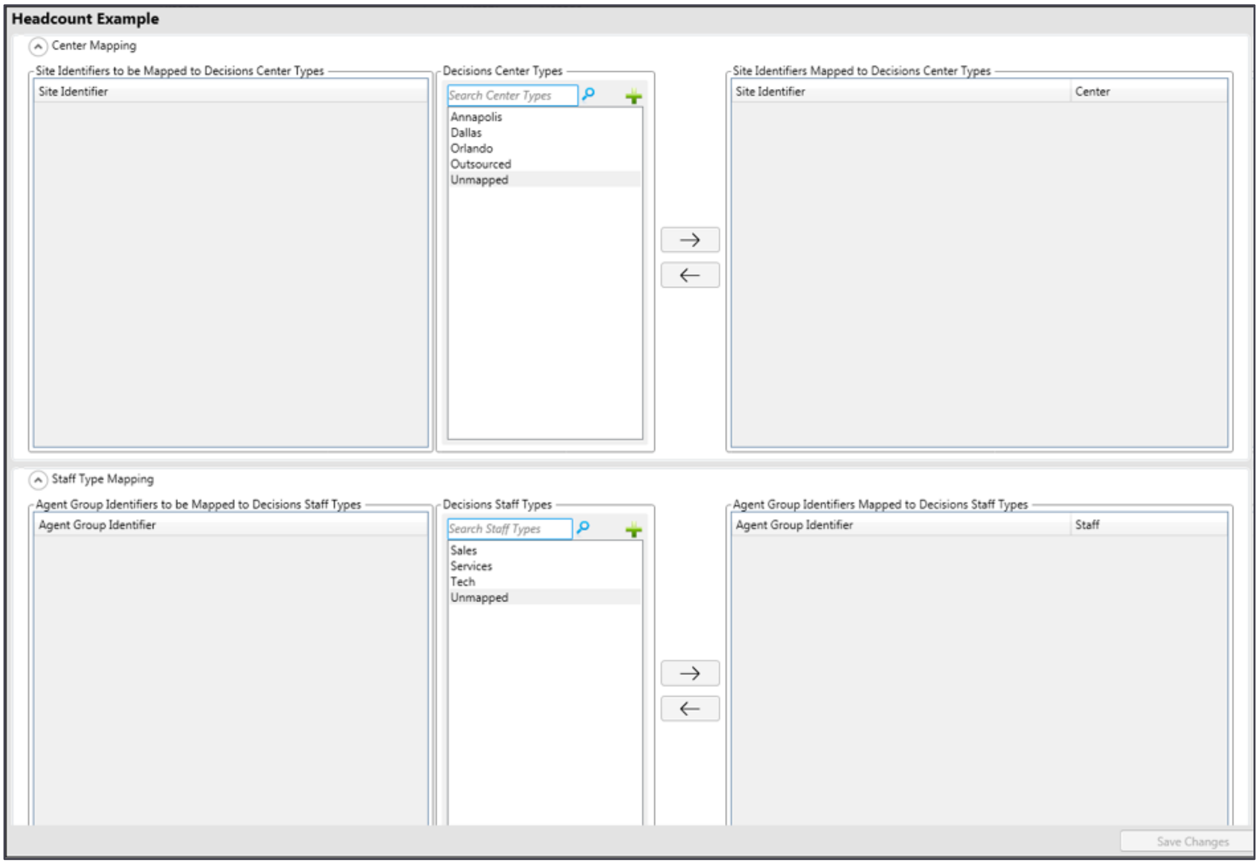
- After selecting Run, a progress bar will appear on the bottom of the screen.



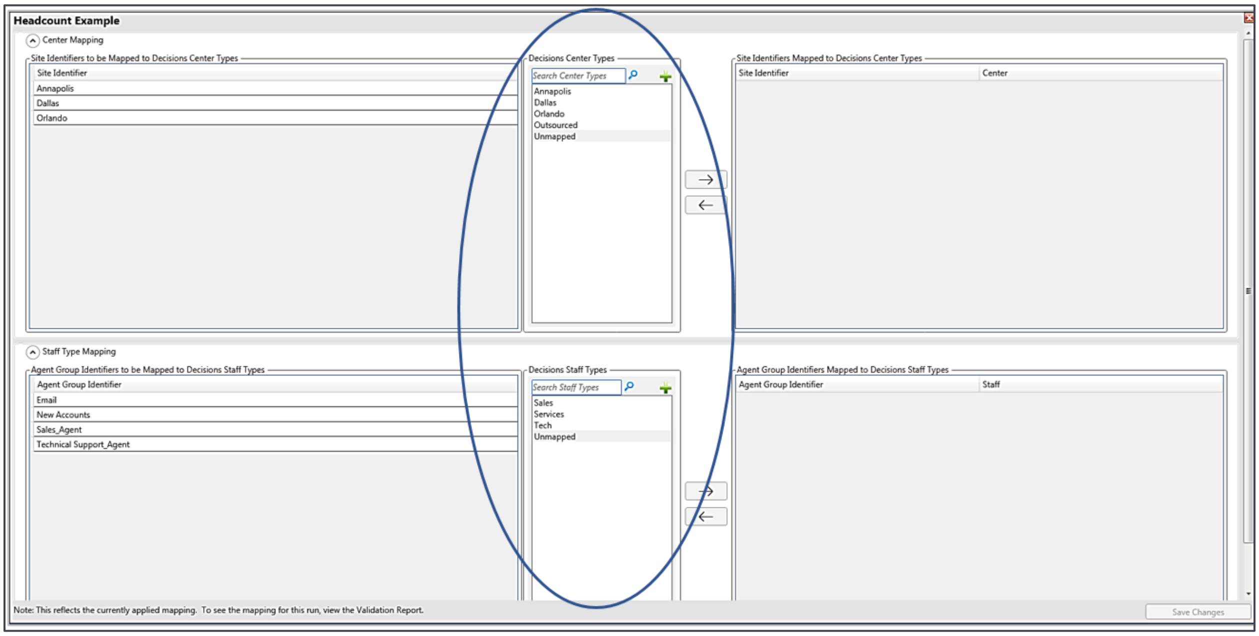
  - Note: If User selects Cancel while the data feed is uploading, it will still generate results up until the point that Cancel was selected.
- When the data has completed importing, a new screen will generate prompting the user to map their data.

Section 4: Data Mapping

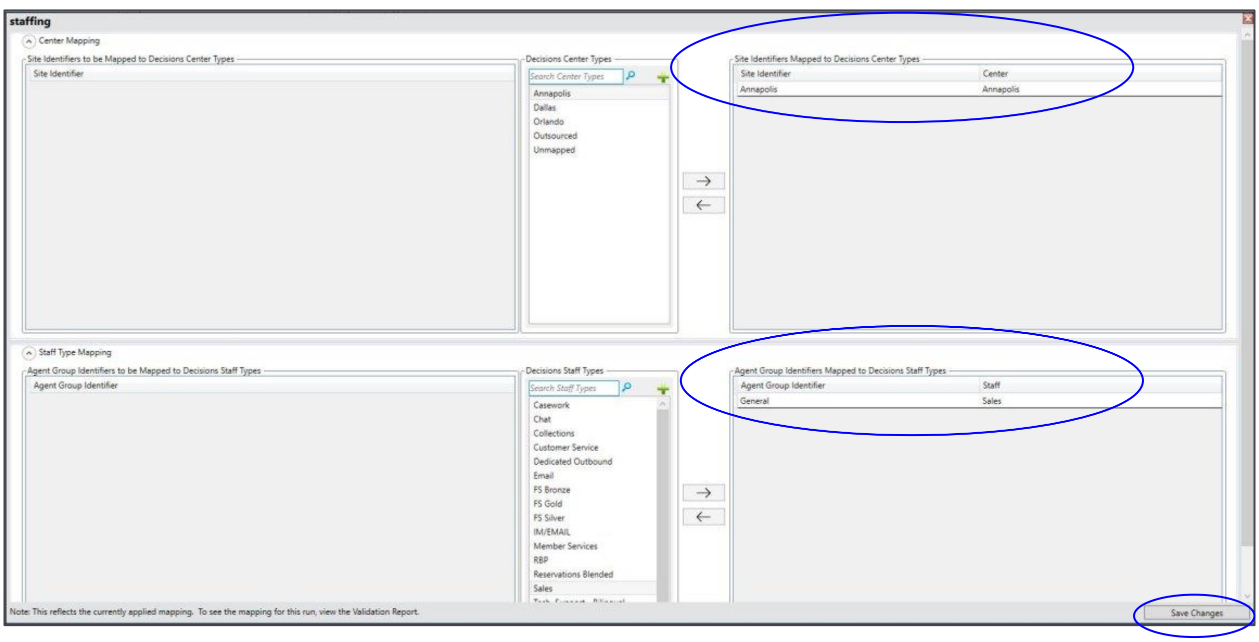
After the Data Feeds are configured, the data within the files needs to be mapped accordingly, which can be done so in the following window that will generate when the user runs their data feeds. Or, the mapping screen may be accessed again by right-clicking on the Data Adaptor under Run and selecting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



- 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	✓	✓	✓	✓	Details

- 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	✓	✓	✓	✓	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 by N.Arrenholz-Cooper

Adapter Type: Standard Head Count

Selected Date Range: 1/1/2016 - 12/9/2016

Date Range Of Imported Data: 1/4/2016 - 1/4/2016

Data Extraction

Data Source	Extraction Type	Event	Description
Standard Headcount Import Source	File	Files found	Found 1 file(s) to process. These files are: STAFFING_01042016.txt.

Center Staff Summary

Decisions Identifiers

Center Type	Staff Type	Attrition FTE	Agent Head Count	Agent FTE	Clerical Head Count	Clerical FTE	New Hires FTE	Supervisor Head Count
Annapolis	Sales	0	143	127.1			0	
Dallas	Sales	0	61	59.38			0	
	Total	0	204	186.48			0	
	Grand Total	0	204	186.48	0	0	0	0

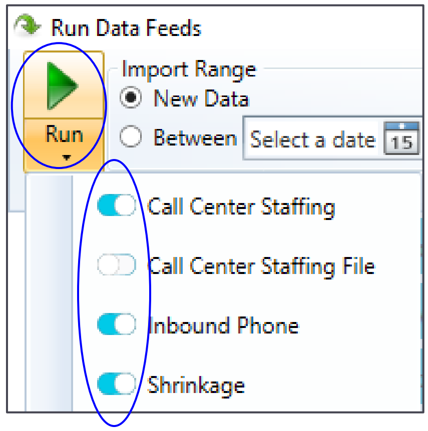
Details of Mapped Identifiers

Site Identifier	Center Type	Agent Group Identifier	Staff Type	Attrition FTE	Agent Head Count	Agent FTE	Clerical Head Count	Clerical FTE	New Hires FTE	Supervisor Head Count
Annapolis	Annapolis	SALES_AGENT	Sales	0	143	127.1			0	
Dallas	Dallas	SALES_AGENT	Sales	0	61	59.38			0	
			Total	0	204	186.48			0	

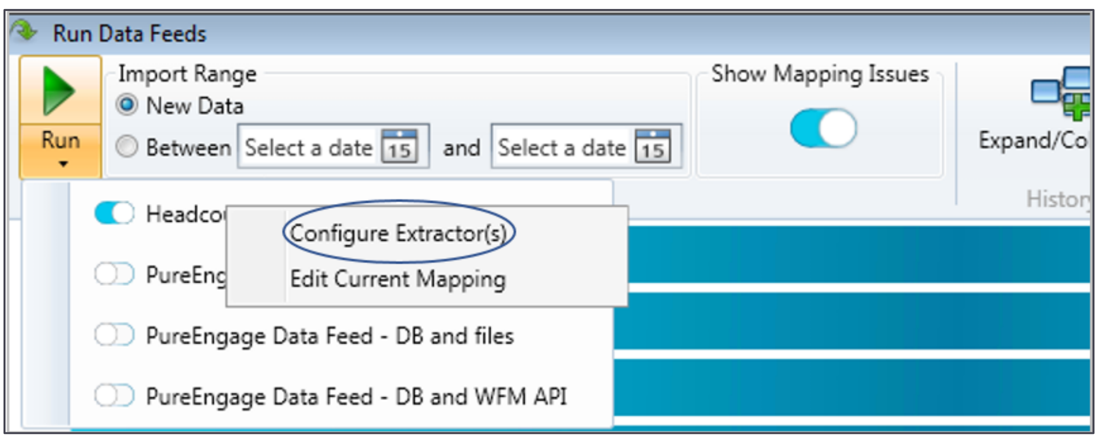
Chapter 4: Managing Data Feeds

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.



- 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.

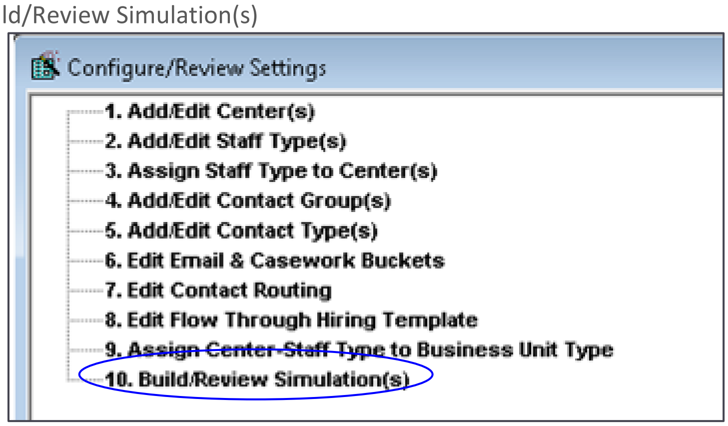
Genesys Decisions simulates expected outputs for:

- 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)

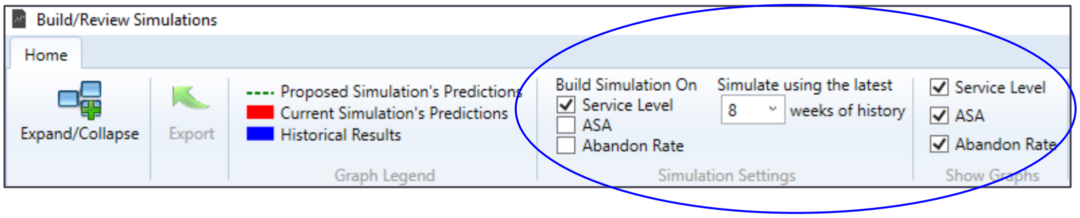


- The process of building simulation models can range from 1 to 15 minutes depending on the speed of the machine and the number simulations

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

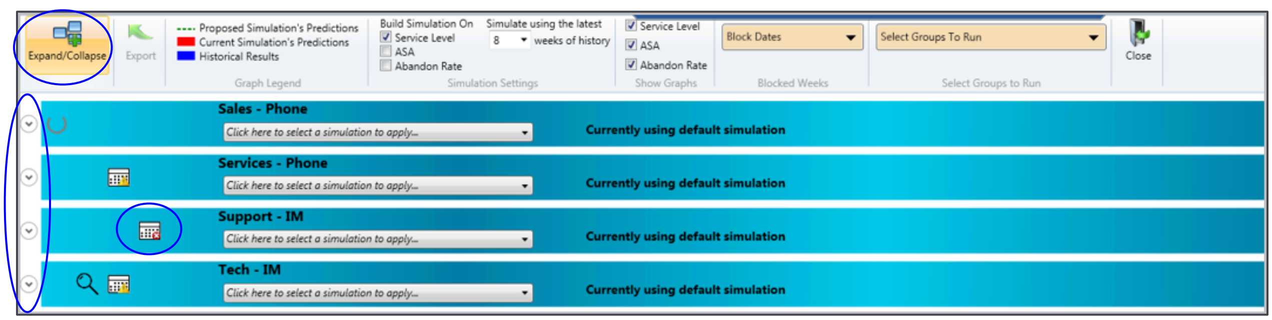
- To change the default setting for the service goals and number of historical weeks used to build the simulation models just deselect any service goals that should not be included and either type over the number of weeks or select a new value from the drop-down list.



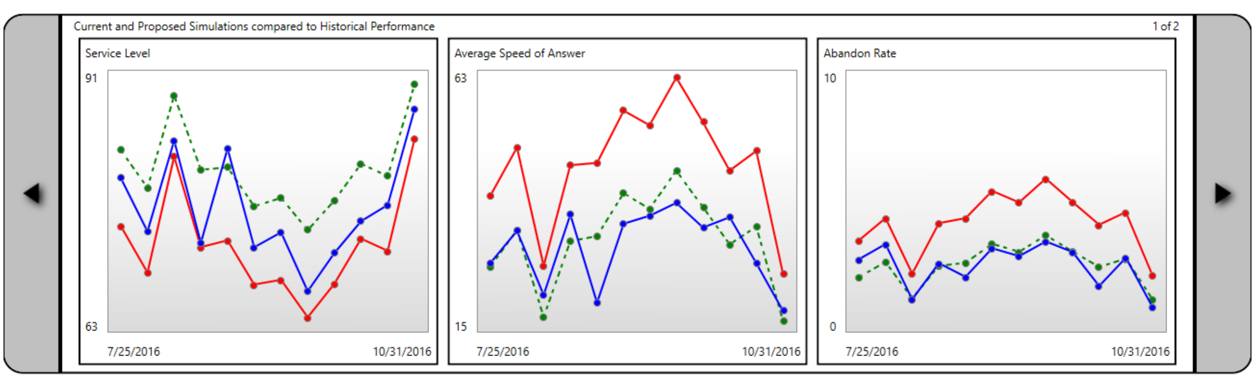
Section 4: Reviewing model accuracy

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

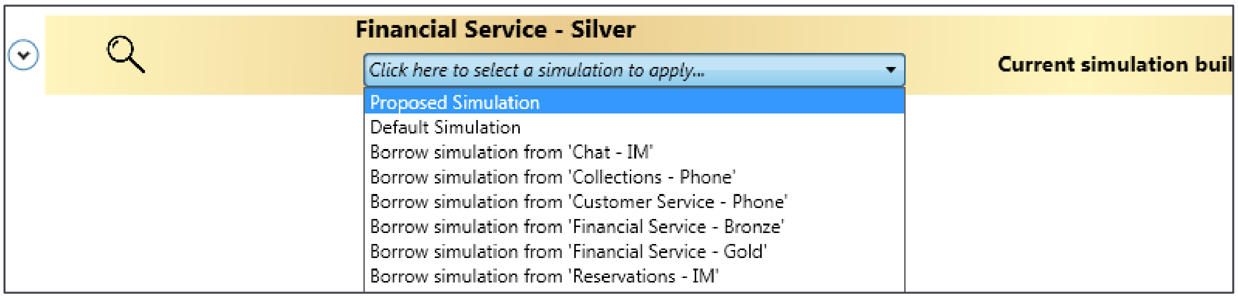
1. To view results of the models, click on the  next to the contact type name
2. If no data has been imported for that group, you will see an icon that indicates that there is no history  . This can also mean that there is not enough history to satisfy the number of weeks selected to use.



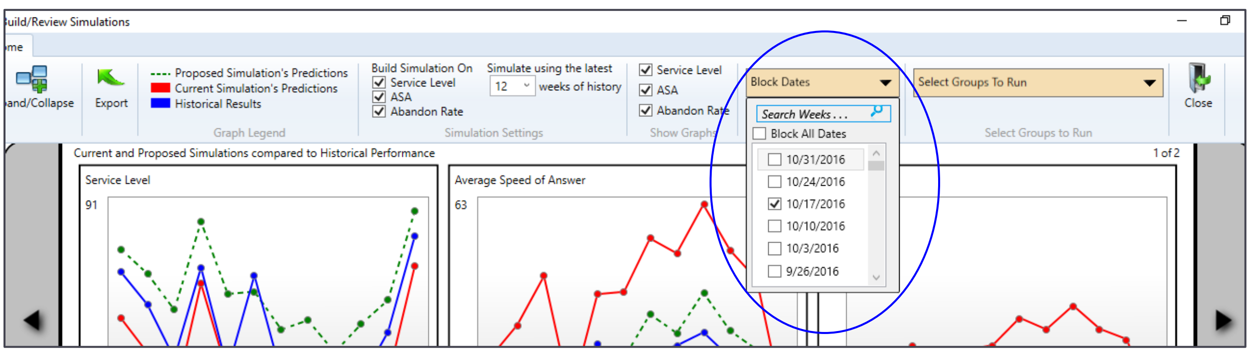
3. Review the results of each model, the blue line on the chart represents the actual historical data, the red line is the current simulation which was created using a default model (and probably won't be very accurate) and the green line is the proposed simulation which is the new simulation that was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



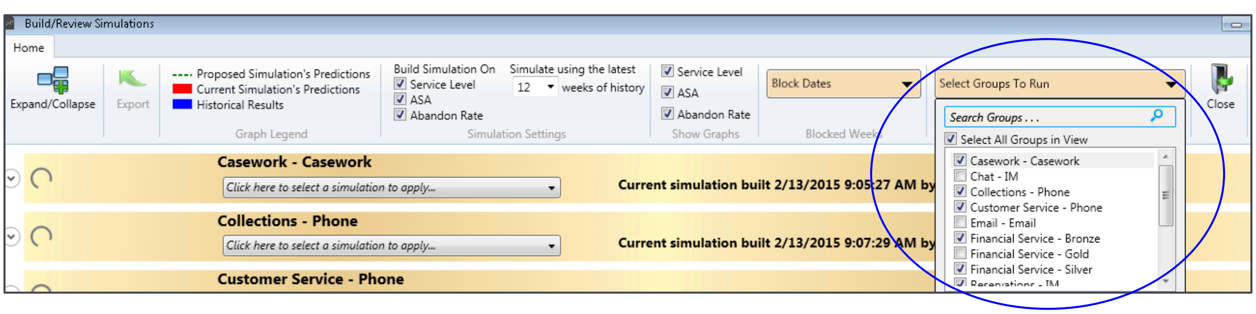
4. If the proposed (green line) simulation results are satisfactory then click on the drop-down list and choose Proposed Simulation. If the proposed simulation seems to be too far from the historical (blue line), it is important to review the data sets that are being simulated to determine if there are 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.



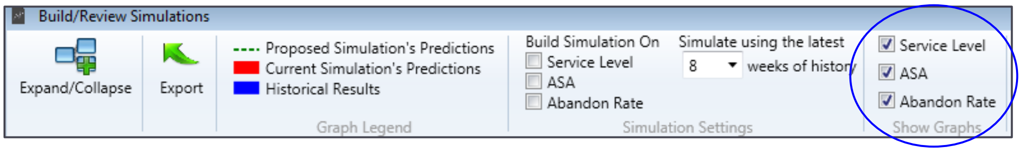
5. To exclude certain week(s) from the data sets being evaluated, Decisions has a Blocked Dates option to exclude one or several weeks of historical data from the simulation. To block a week, select Block Dates and select the corresponding week(s) you wish to block from the dropdown list.

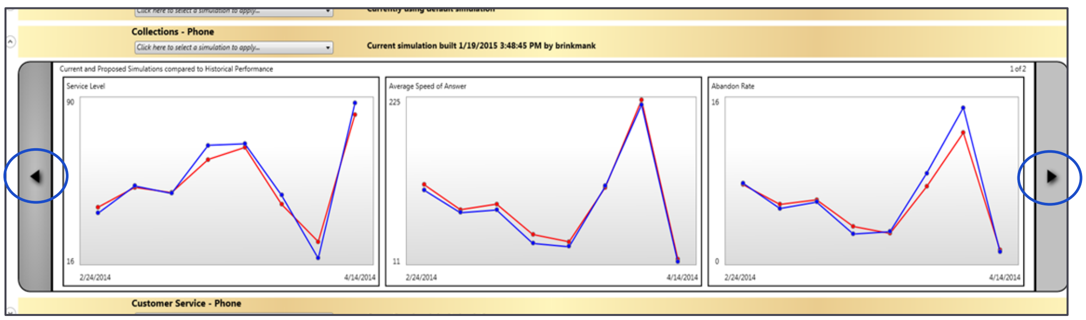


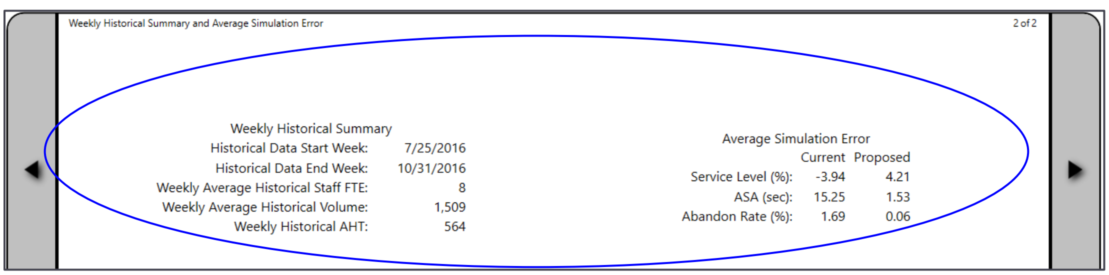
6. When the Build/ Review Simulations module is opened, all of the configured groups will automatically display on the screen and begin checking for a proposed simulation prediction. To run only specific groups, choose Select Groups to Run to select or deselect groups to review.



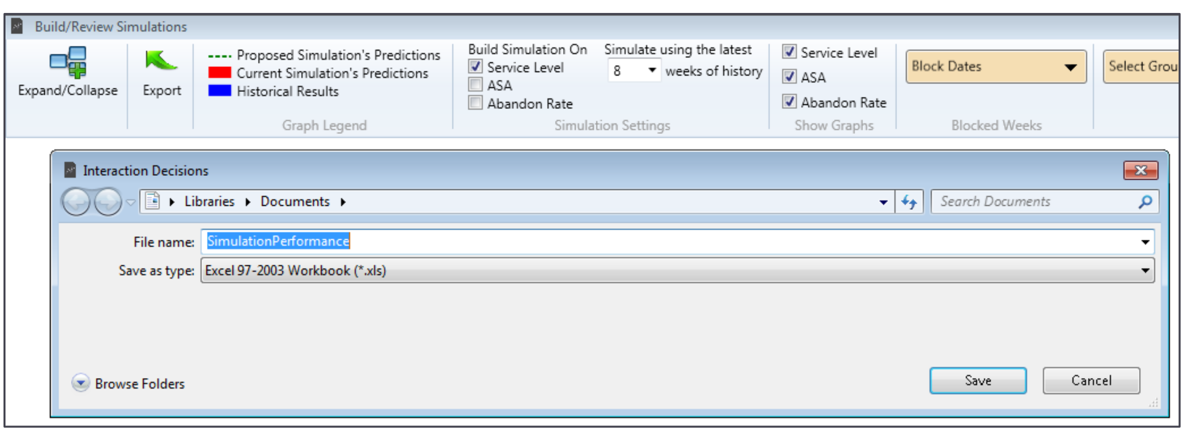
7. Please note that when the new simulation is applied the results will change in your scenario files. In other words, the scenarios you use in the user application to determine staffing and forecasts will use the simulation results and will provide an output that is directly affected by the simulation 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.



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
Split out Config	Phoenix	Sales
	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
Split out Config	Premier Sales
	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 call identifier 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

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.

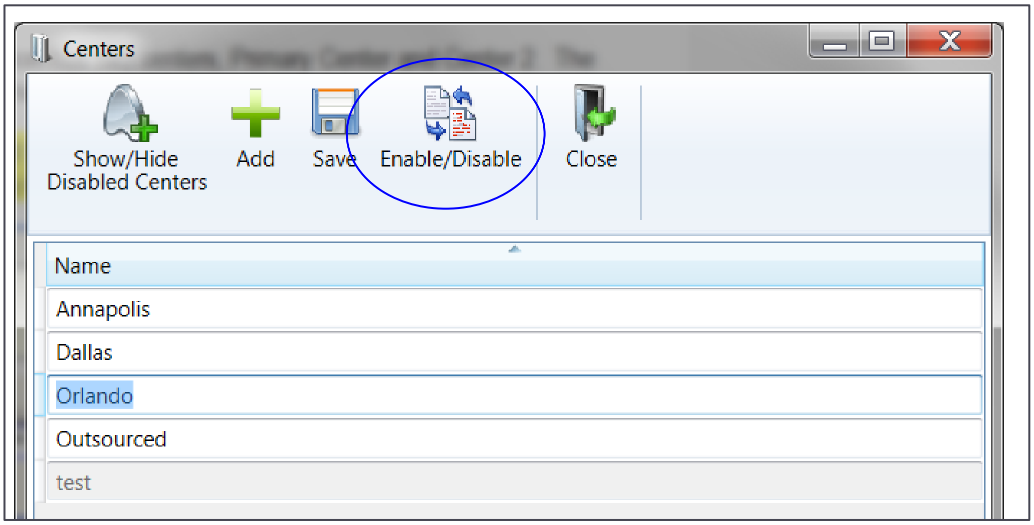
Section 7: Merge Centers

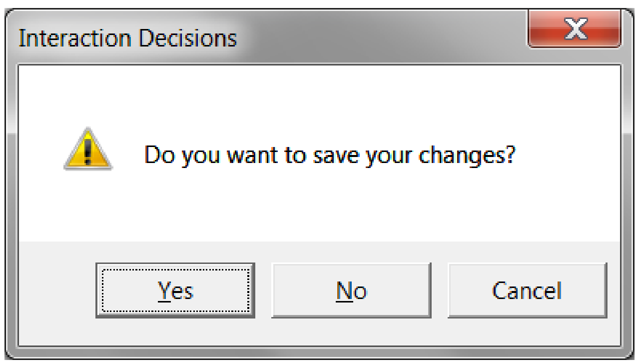
When merging two centers into one, the following steps will need to be completed in the following order:

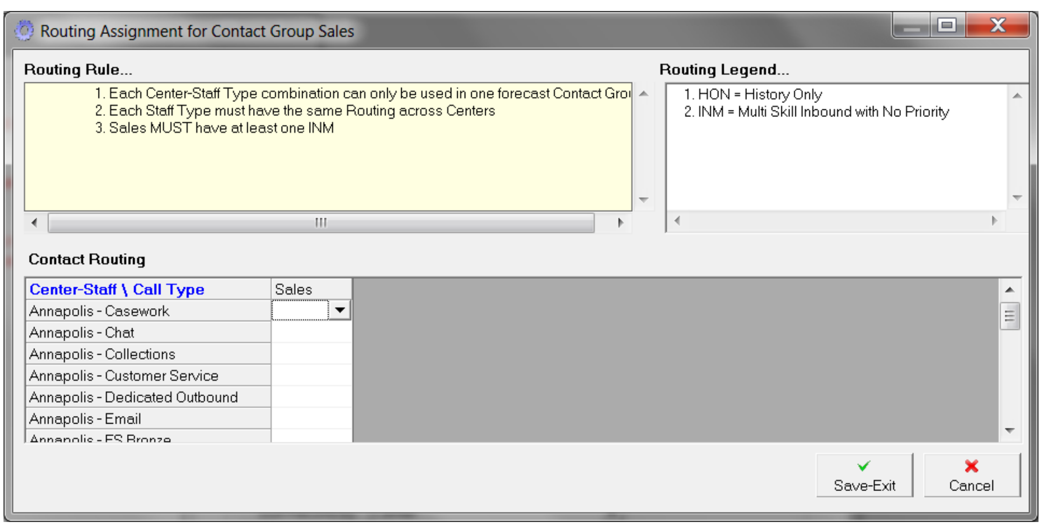
- Determine which center will be deleted and if the remaining center will keep the existing name or will need to be renamed.
- If the remaining center will need to be renamed, click on 1. Add/Edit Center and type in the new center name over the current name
- Example:

	Center
Current Config	Dallas
	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.

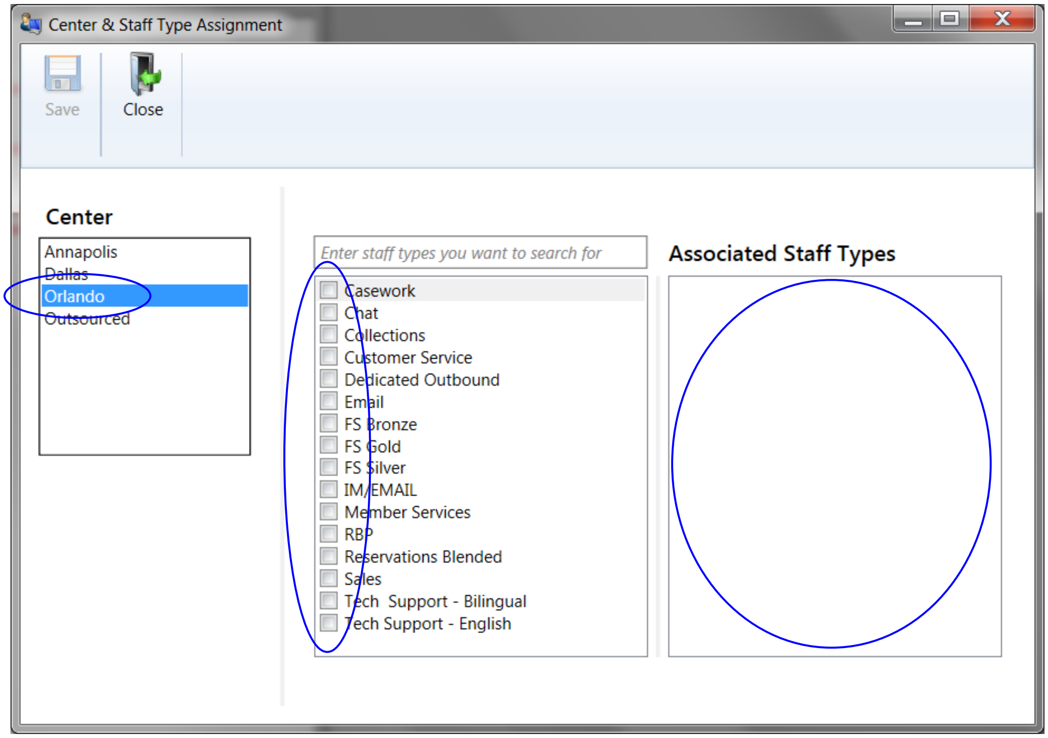






Orlando is now removed from the Routing Assignment above.

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



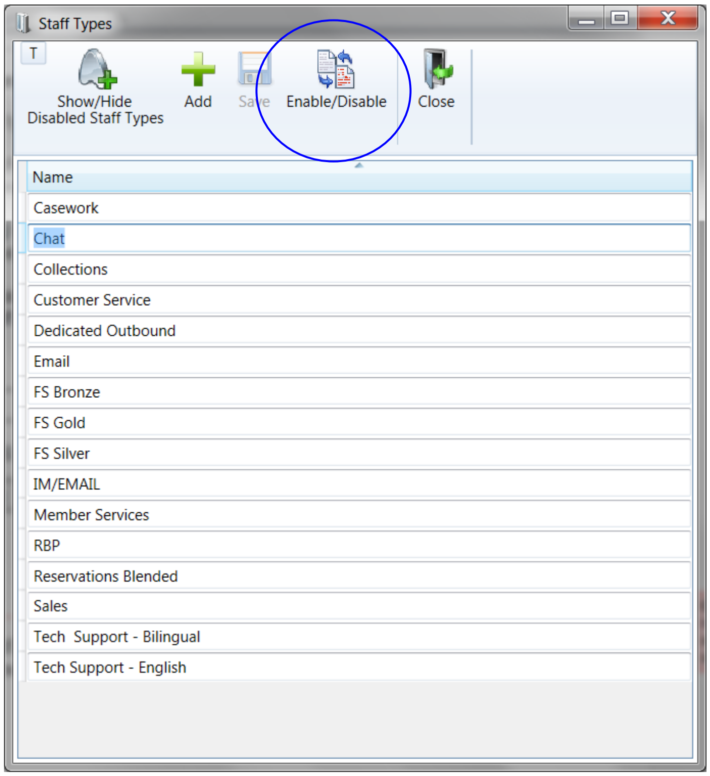
- If the Orlando data will continue to be imported but mapped to the Dallas center, see Section 3.3, Data Mapping for instructions on how to map data.

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
	Staff Type 2
Merge Config	Staff Type 1

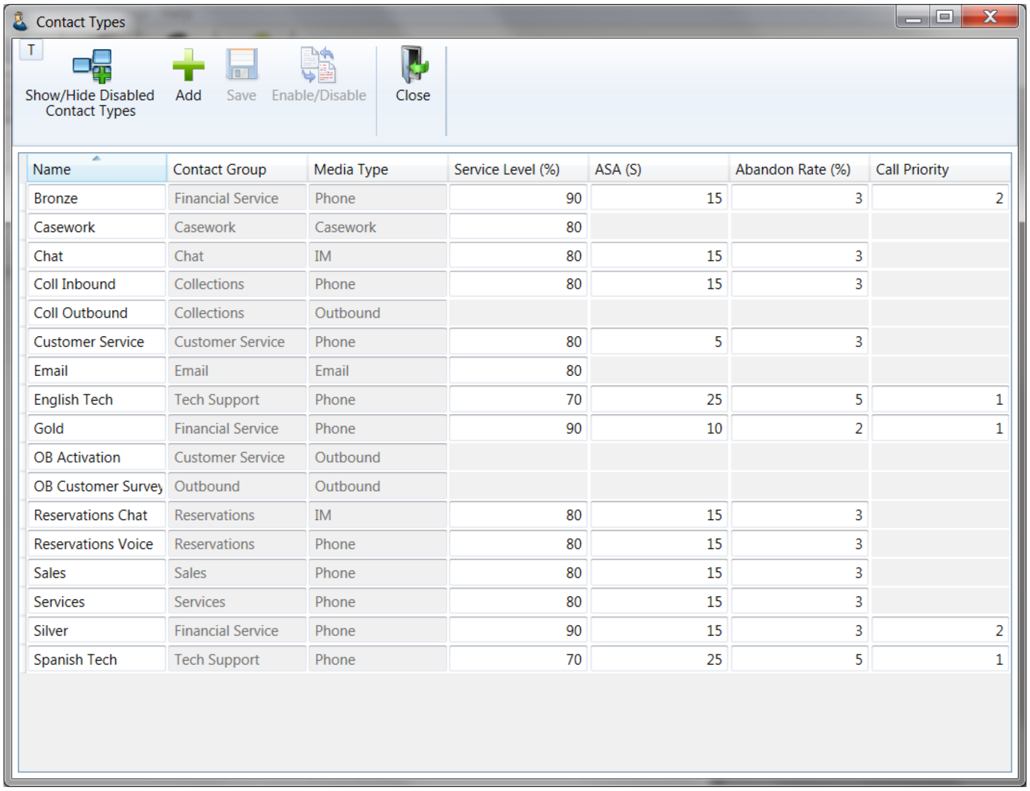


- Similar to merging a center, as soon as the staff type has been disabled, it will be removed from Center Staff Assignment and Routing.
- Update the staff type mappings for Headcount, Shrink and ACD imports. See Section 3.3 Data Mappings

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.



Name	Contact Group	Media Type	Service Level (%)	ASA (S)	Abandon Rate (%)	Call Priority
Bronze	Financial Service	Phone	90	15	3	2
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	1
Gold	Financial Service	Phone	90	10	2	1
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	2
Spanish Tech	Tech Support	Phone	70	25	5	1

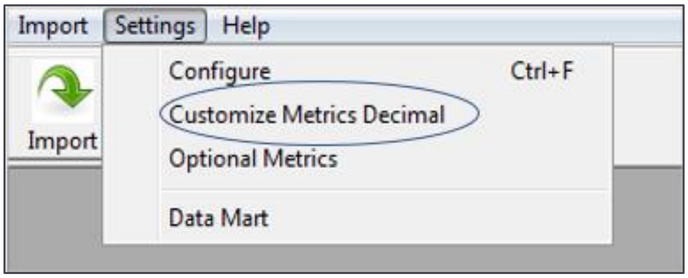
- Similar to merging a center, as soon as the contact type has been disabled, it will be removed from all assignments.
- Import merged ACD data, see Section 3.2 Importing Data
- Update the contact type mapping, see Section 3.3 Data Mappings
- Build new simulation model, see Section 4.2 Build Simulations

Chapter 7: Chapter Customize Metrics Decimal

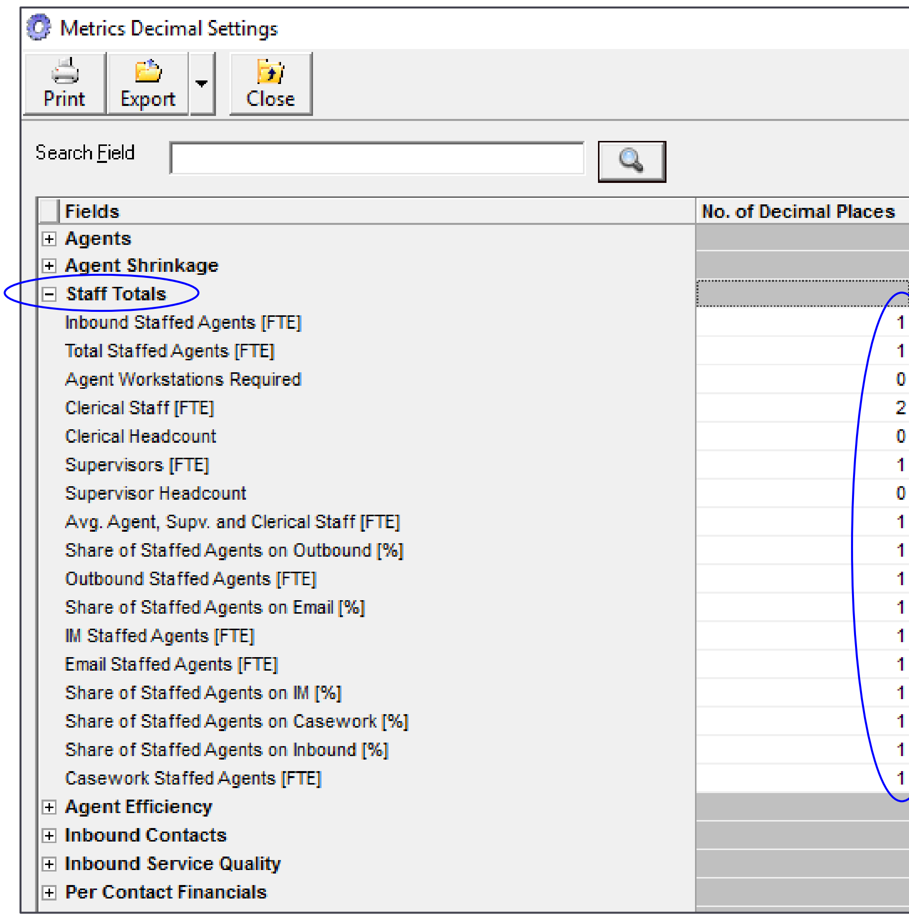
Section 1: Overview

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.

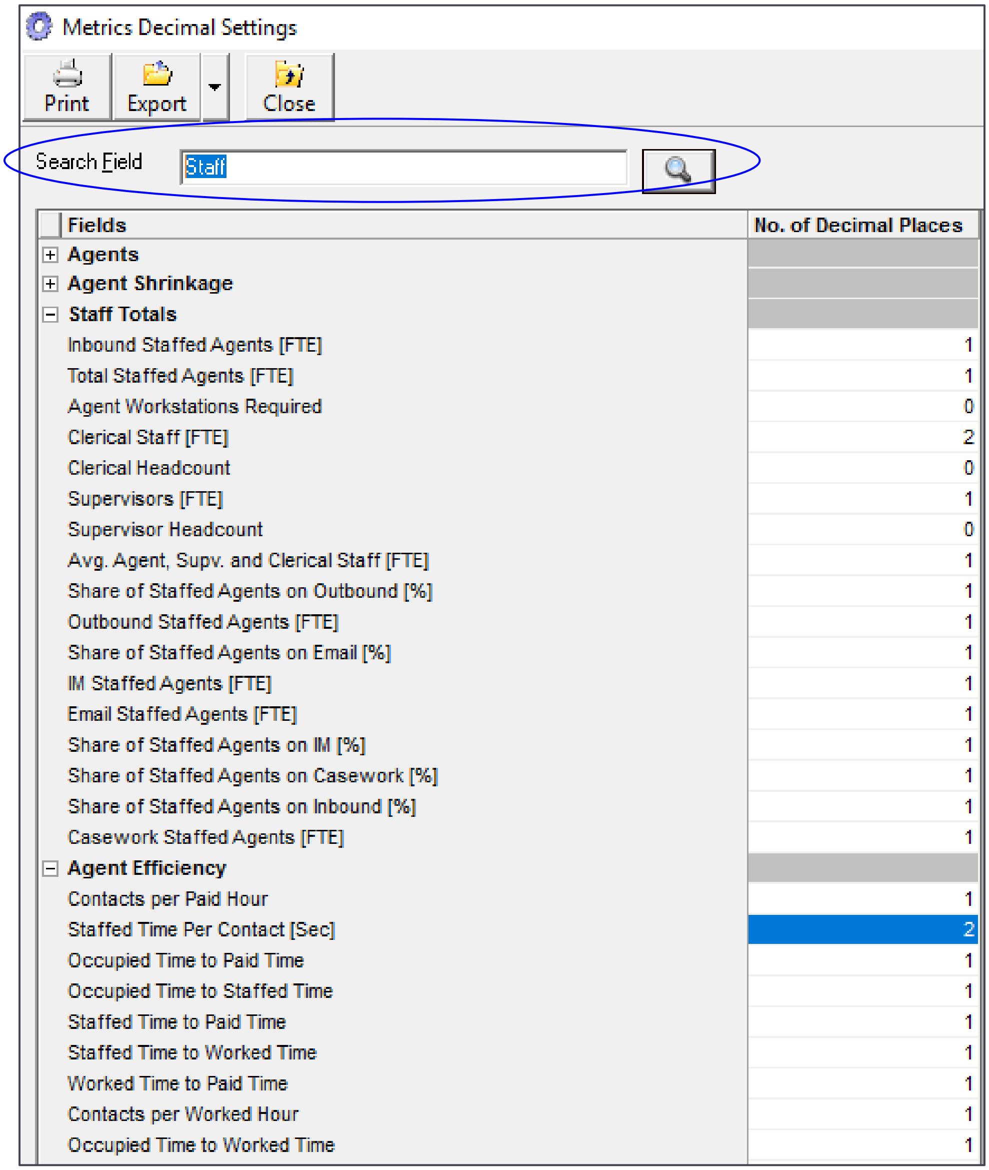
- In the admin application, navigate to Customize Metrics Decimal under Settings.



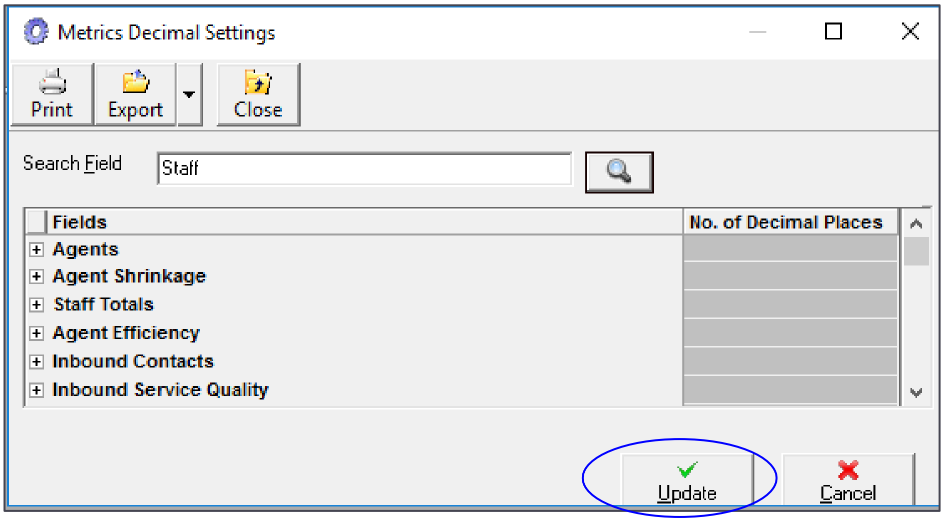
- Expand the metric group to expose the metric that you want to change the number of decimal places displayed.
- Double-click in the corresponding cell in the column No. of Decimal Places. Here, input a value according to the number of decimal places to be displayed. Note that “1” is tenths, “2” is hundredths,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



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



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

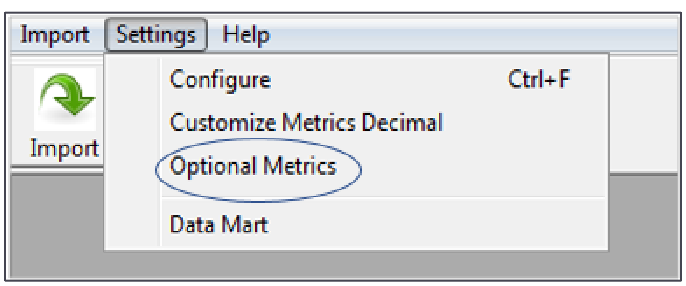


Chapter 8: Optional Metrics

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.

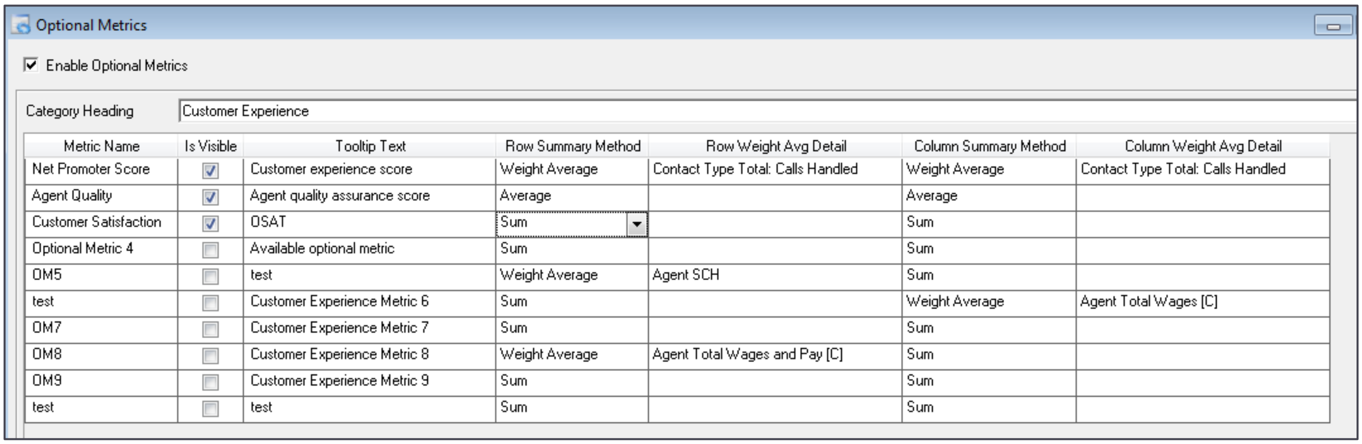
- In the admin application, navigate to Optional Metrics under Settings.



- 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.



Metric Name	Is Visible	Tooltip Text	Row Summary Method	Row Weight Avg Detail	Column Summary Method	Column Weight Avg Detail
Net Promoter Score	☑	Customer experience score	Weight Average	Contact Type Total: Calls Handled	Weight Average	Contact Type Total: Calls Handled
Agent Quality	☑	Agent quality assurance score	Average		Average	
Customer Satisfaction	☑	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]
OM7	☐	Customer Experience Metric 7	Sum		Sum	
OM8	☐	Customer Experience Metric 8	Weight Average	Agent Total Wages and Pay [C]	Sum	
OM9	☐	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

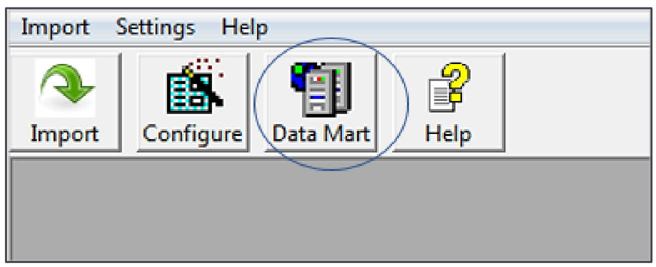
- Data Mart Administrators can enable/disable Data Mart Security, add/delete users and can share any Folder with any user.
- To be a Data Mart Administrator, the SQL user must be assigned the DataMartAdmins database role.
- A user that is only a member of the DataMartAdmins database role does not have 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

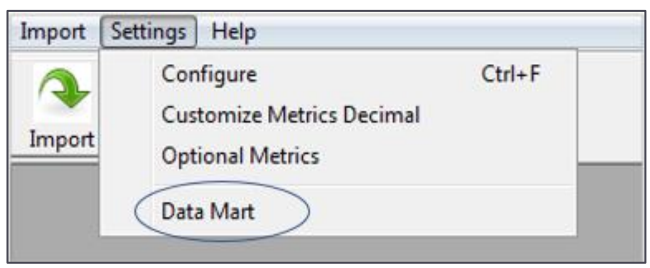
- Data Mart Users are those users who either need to publish data to the Data Mart from the Genesys Decisions application, or report on data from the Data Mart.
- To be a Data Mart User, the SQL user must be assigned the DataMartUsers database role.

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.



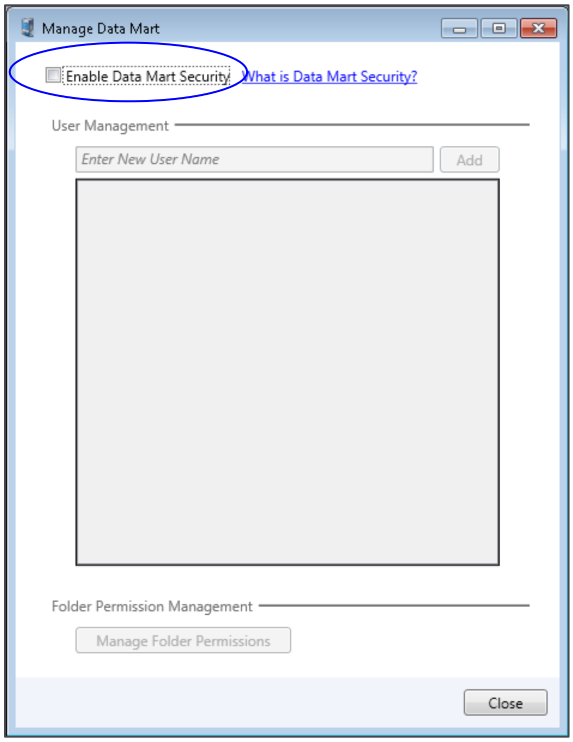
You can also configure Data Mart from the Settings menu above the icons:



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.



- 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
  - 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
  - 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

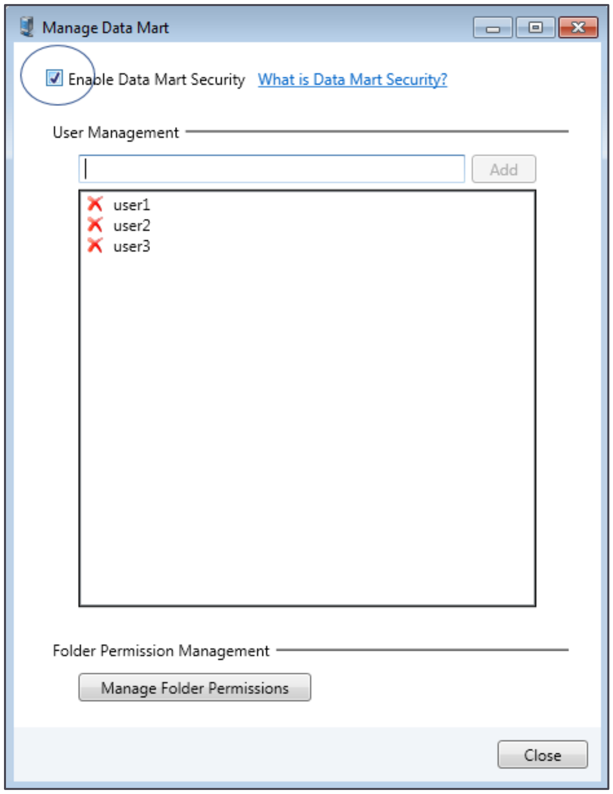
Section 4: Adding a Data Mart User (Only when security is enabled)

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:

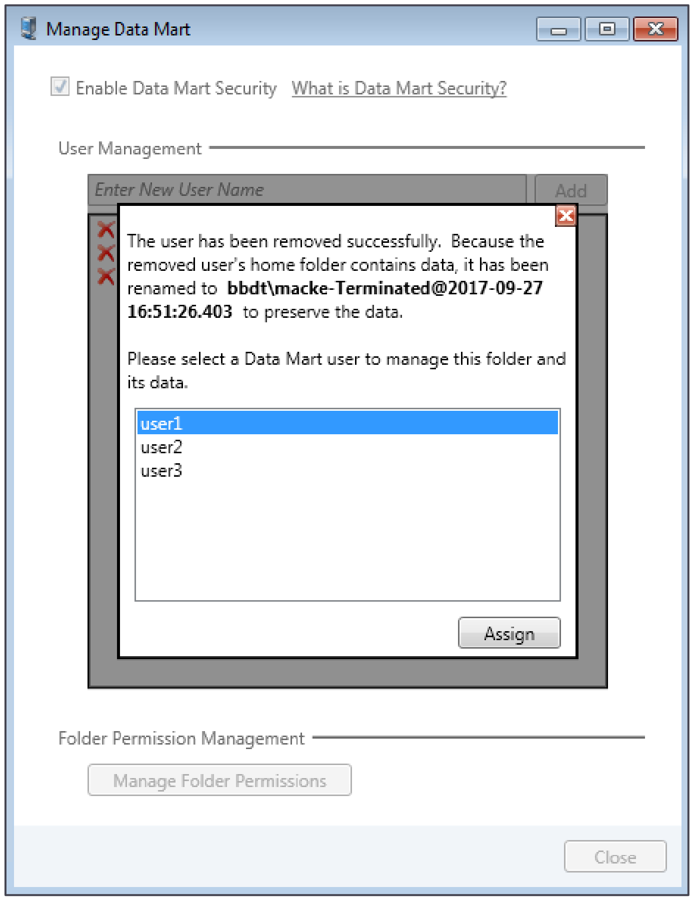
- In the Text Box show below enter the username of the new user and then click Add.
- The user name that gets entered should be either a Windows login or a SQL login.



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

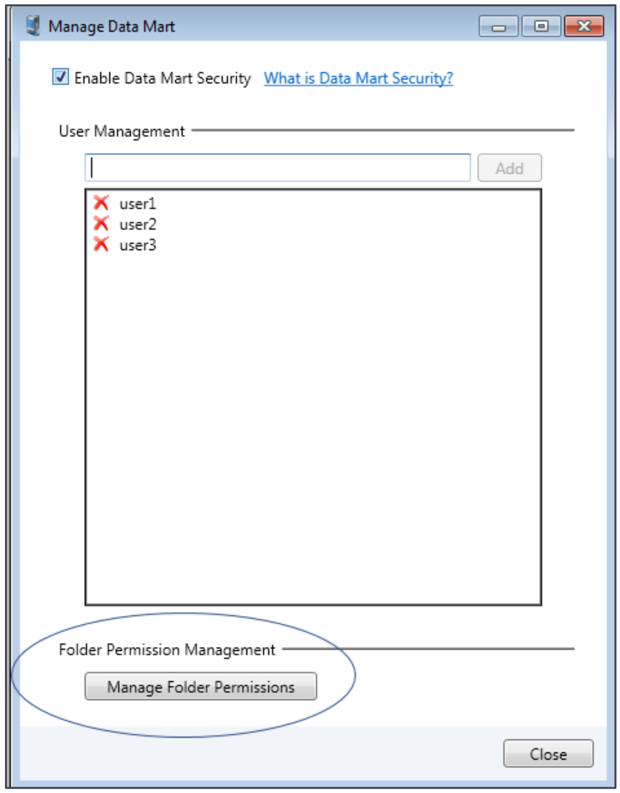
Delete Users:

- Click on ✗ 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.

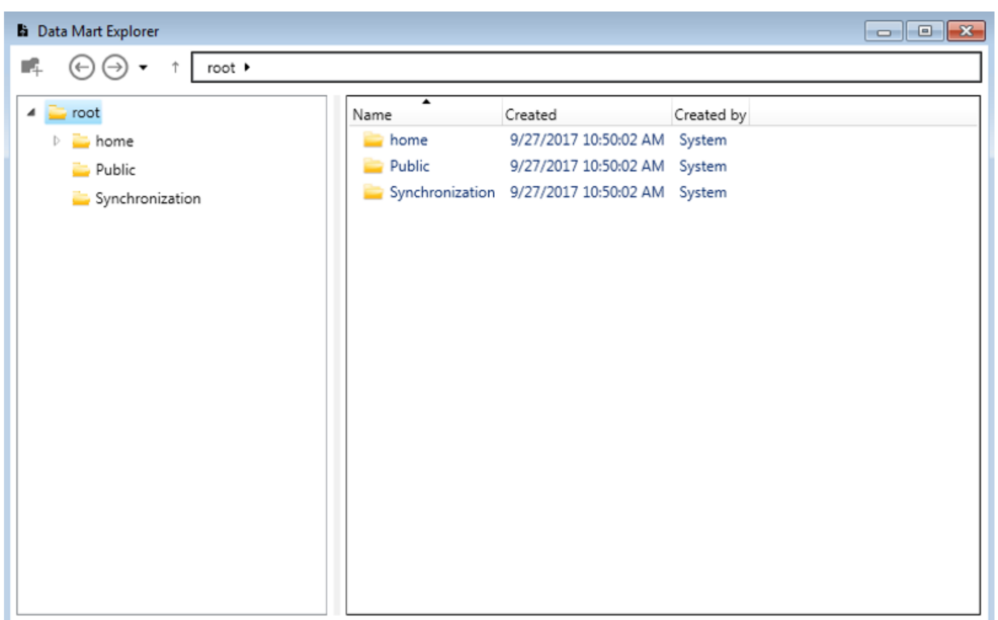


Section 6: Data Mart Explorer

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



- 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.*



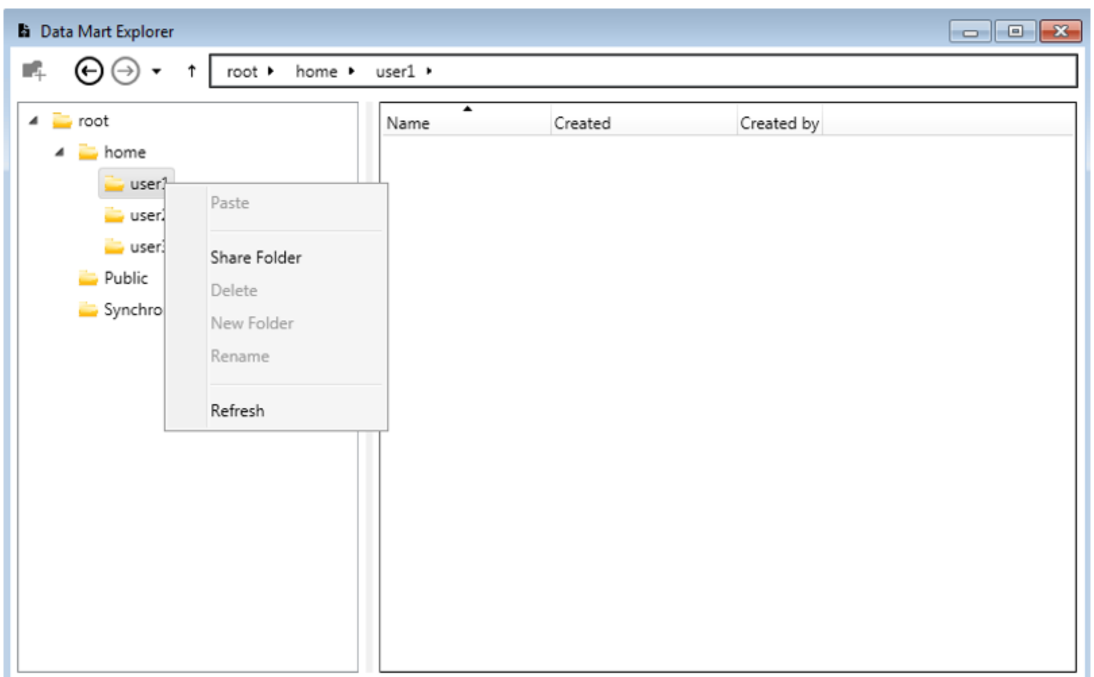
Section 7: Folder Hierarchy

Folder Hierarchy:

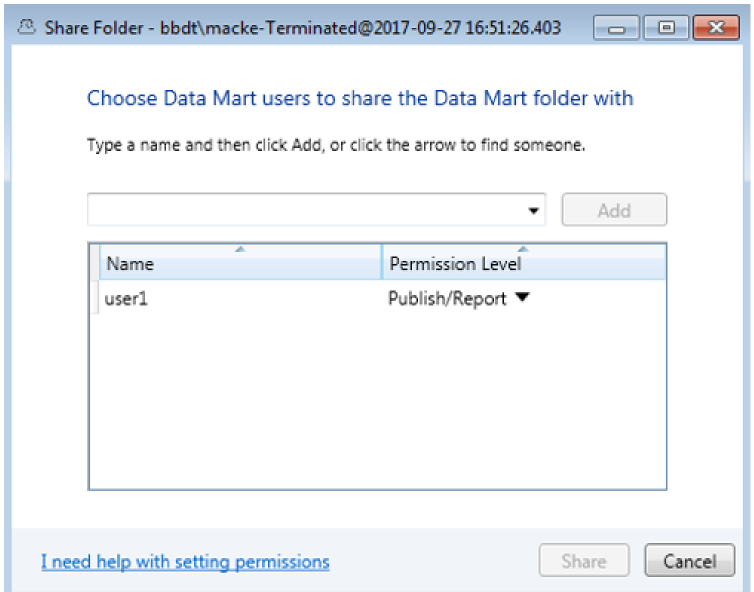
- Root folder
    - Contains home, public and synchronization folders.
- Home folder (Only displays if Security is enabled)
    - Separate folder under home for each user
    - Scenarios can be published to these folders
- Public Folder
    - Every user who has the DataMartUsers role in the Data Mart 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

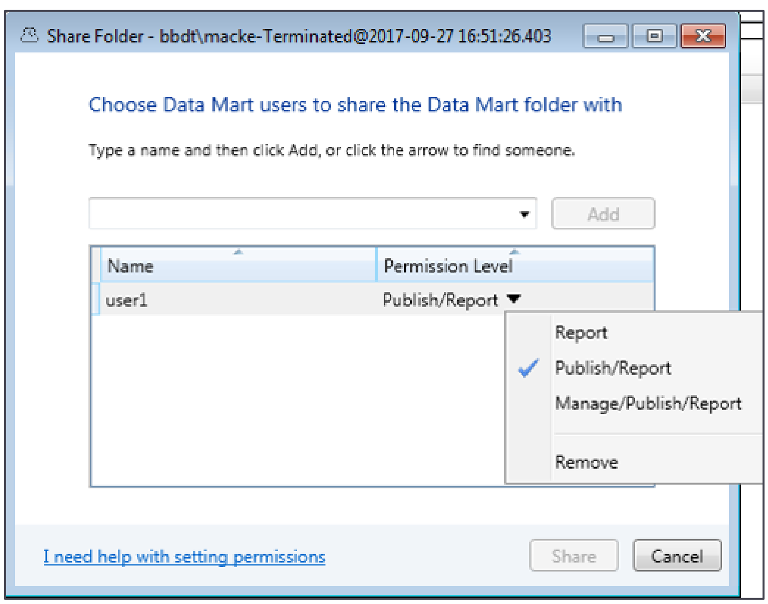
Right click on the user folder in the Data Mart Explorer and select Share Folder.



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



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



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