



Genesys DecisionsTM

Admin Application User's Guide 8.5

Information contained herein is proprietary and confidential and cannot be disclosed or duplicated without the prior written consent of Genesys Telecommunications Laboratories, Inc.

Copyright © 2017 Genesys Telecommunications Laboratories, Inc. All rights reserved.

About Genesys

Genesys® powers 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 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, performing equally well across all channels, on-premise and in the cloud. Experience communication as it should be: fluid, instinctive and profoundly empowering.

Each product has its own documentation for online viewing at the Genesys Documentation website.

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

Genesys and the Genesys logo are registered trademarks of Genesys Telecommunications Laboratories, Inc. All other company names and logos may be trademarks or registered trademarks of their respective holders. © 2017 Genesys Telecommunications Laboratories, Inc. All rights reserved.

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_us_07-2017_v8.5.101.00

Table of Contents

Chapter 1: Introduction	4
Section 1: Decisions Overview	4
Section 2: Getting Started	5
About this guide	5
Chapter 2: Initial Implementation	6
Section 3: Cloud Environment	6
Architecture	6
Network Requirements	7
Data Backup Policy	7
Section 4: Security	8
Decisions Security	8
User Management	9
Section 5: Release Package Requirements	10
Section 6: Historical Data	10
Chapter 3: Navigating the Decisions Cloud	11
Section 7: Logging into Decisions	11
Section 8: Managing Files in the Decisions Cloud Environment	12
File Storage	12
Citrix Only - Copying files to and from the Decisions Cloud environment	12
Remote Desktop Services Only - Copying files to and from the Decisions Cloud environment	13
File Management	14

Chapter 1: Introduction

In this chapter:

- Section 1: Decisions Overview
- Section 2: Getting Started

Section 1: Decisions Overview

Decisions is a multi-user what-if analysis staff planning and budget planning system for contact center networks. With Decisions, users will quickly and accurately develop weekly, monthly, annual and multi-year planning scenarios.

Each scenario delivers:

- Forecasts of key drivers (e.g., contact volume, handle time, shrinkage)
- Weekly and monthly hiring, overtime and leave plans
- Weekly and monthly ASA, abandon rate, occupancy and service level predictions
- Detailed budgeting and variable labor cost variance analysis

Section 2: Getting Started

In this Section

- About this guide
- Release and Product documentation

About this guide

This guide is intended for IT professionals, Decisions Users and Administrators and others who have a role in accessing or using the Decisions applications. It includes information required to access the Decisions Cloud environment, technical support contacts and instructions on how to navigate within the cloud environment.

Chapter 2: Initial Implementation

This chapter provides high level information about the Decisions cloud environment and initial implementation requirements. Information for specific customer implementation projects are discussed in detail during the implementation project.

In this chapter:

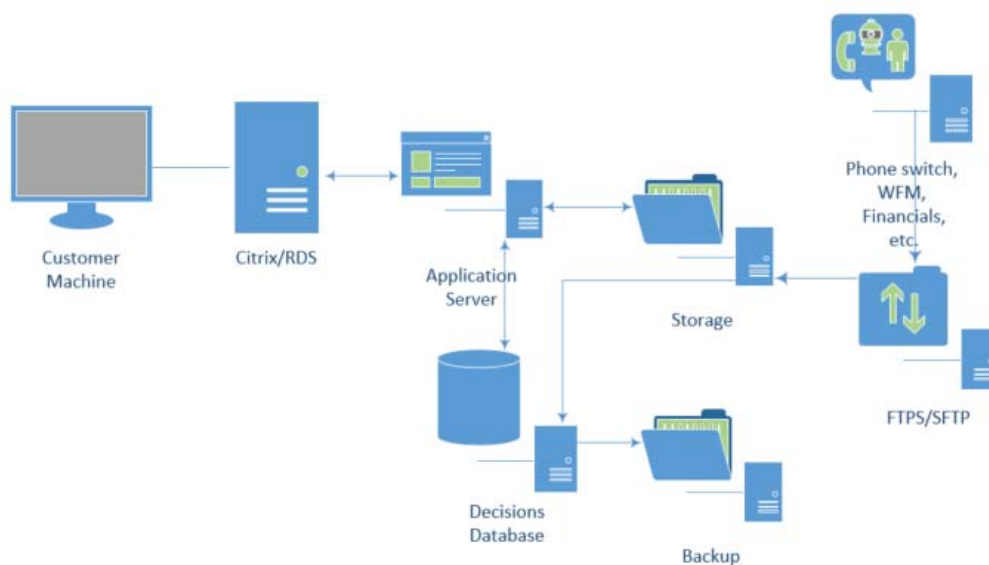
- Section 3: Cloud Environment
- Section 4: Security
- Section 5: Basic Planning Information
- Section 6: Historical Data
- Section 7: Import files
- Section 8: Accessing the Cloud

Section 3: Cloud Environment

In this Section

- Architecture
- Networking Communications
- Data Backup Policy

Architecture



Network Requirements

- Internet access is required to connect to your Decisions environment.
- Allow SSL communication (443) to Citrix access gateway / exempt access gateway from Customer IP proxy

FTPS

- Firewall port open and accessible FTPS 21 & 5004

Data Backup Policy

The Decisions production database is fully backed up on Wednesdays and Sundays. The full backups are retained for fourteen (14) days. Differential backups are conducted on Monday, Tuesday, Thursday, Friday and Saturday. The differential backups are retained for fourteen (14) days.

Section 4: Security

In this Section

- Decisions Security
- User Management

Decisions Security

The Decisions applications in the cloud environment utilizes Active Directory groups and Citrix or RDS user ID to control access.

This section discusses the following topics:

- Decisions_Administrators Active Directory Group
- Decisions_Users Active Directory Group
- IP Whitelist
- Citrix
- Remote Desktop Services Security (Canada Only)

Decisions_Administrators Active Directory Group

The Decisions_Administrators active directory group contains the users that will be responsible for adding/updating configuration and mapping, building simulation models, and importing weekly data. Access to the Admin application should be limited due to changes to the configuration and simulation models impact the outputs in the user application.

Decisions_Users Active Directory Group

The Decisions_Users active directory group contains the users that generate, maintain and develop what-if plans, run reports, etc. in the user application. Users should understand the configuration to effectively develop and interpret plans.

IP Whitelist

The Decisions cloud utilizes an IP whitelist to ensure security for our customers using the FTP to transfer data to and from the Decisions cloud environment. A range of IPs works best.

Citrix (US Only)

Citrix Receiver is utilized to access the cloud environment. This program can be downloaded and installed from the following URL:

<http://www.citrix.com/products/receiver/overview.html>

To enable compatibility with all XenApp 6.5 offerings, the Citrix Client minimum version is 13.0. We recommend using the most up to date/recent Citrix Client/Receiver version.

Each user will receive user specific credentials (ID and temporary password) for the Citrix environment. Upon the first login, the user will be prompted to reset their password for security purposes.

Remote Desktop Services Security (Canada Only)

Decisions RDS environment in Canada uses a two-factor authentication solution provided by Duo Security. The Two-factor authentication enhances the security of user accounts by using a secondary device to verify user identity.

Additional information about Duo:

<https://duo.com/solutions/features/user-experience/easy-authentication>

<https://duo.com/docs/self-service-portal>

<https://duo.com/solutions/features/two-factor-authentication-methods/duo-mobile>

Each user will receive user specific credentials (ID and temporary password) for the RDS environment. Upon the first login, the user will be prompted to setup the Duo security.

User Management

During the initial implementation, the Decisions Implementation team will set up user accounts for the Citrix/RDS environments.

The following information will be need for each user:

- Name (First, Last)
- Phone Number
- Type of user (Admin/User)
- Email Address
- Title

After the initial implementation, request to add new users, remove users, or to reset passwords should be sent to Decisions Support. See [Section 9: Decisions Support](#)

Section 5: Release Package Requirements

The following information is utilized to create the initial release package that will be used during the initial installation.

- Start day of the planning week – Most customers start their planning week either on Sunday or Monday
- Number of agent hours in a work week – Typically, customers use 40 hours, however, some use 37.5 or 37.

Once the start day of the planning week and number of hours in a work week are setup during the initial implementation, they cannot be changed.

Section 6: Historical Data

Historical data is utilized to build metric forecasts, custom simulation models and reports. The Decisions application can receive import files from multiple types of data sources. The import files must contain the required data and be in a specific format based on the data specifications.

The historical data should be imported weekly.

In this Section

- CIC/Optimizer CaaS data
- CIC/Optimizer On-premise data
- 3rd Party data

CIC/Optimizer CaaS Data

Historical CIC/Optimizer data that resides in a CaaS environment will be extracted by Interactive Intelligence via scripts on a weekly basis and stored in the appropriate folder in the Decisions cloud environment.

CIC/Optimizer data On-premise

Historical CIC/Optimizer data that does not originate in a CIC CaaS environment will be extracted by the customer utilizing the extract scripts provided by Interactive Intelligence. The customer will need to run the scripts weekly, preferably by a scheduled task and post the files to the Decisions cloud environment via FTPS/SFTP.

3rd Party data sources

Historical 3rd party data will need to be sourced by the customer. The data must meet the requirements laid out in the data specification. The customer will need to create the import files weekly, preferably by a scheduled task and post the files to the Decisions cloud environment via FTPS/SFTP.

Chapter 3: Navigating the Decisions Cloud

This section provides information about how to access and manage files in the Decisions cloud environment.

In this chapter:

- Section 7: Logging into Decisions
- Section 8: Managing Files in the Decisions cloud environment

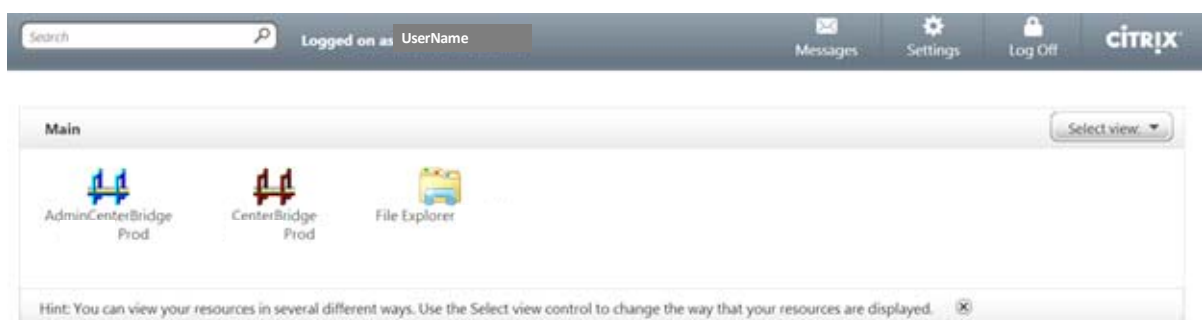
Section 7: Logging into Decisions

The Decisions application can be accessed via the URL provided by the Decisions project team.



Upon successful login with your Citrix/RDS credentials above, you will be able to view icons for applications relating to your access. Icons you may see:

- Decisions User
- Decisions Admin
- File Explorer



Section 8: Managing Files in the Decisions Cloud Environment

In this Section

- File Storage
- Copying Files to and from the cloud
- File Management

File Storage

Files (including scenarios, reports, and historical imports) can be managed within the cloud environment. Within the Decisions cloud environment, a file explorer has been created. The file explorer provided within the cloud environment will give access to the various folders available to the specific Citrix/RDS login.

U Drive

- This is a personal drive. Files in this location will only be visible and accessible to the associated User ID
- This is typically used for storing what-if analysis

S Drive

- This is a shared drive. Files in this location will be accessible to all users within the customers Decisions instance
- This is typically the location where users save their planning scenarios

If you have Admin Access, you will also see:

M Drive

- This is a FTPS Import drive
- This drive is the destination location for the historical import file transfers and is utilized in the importing process
- There will be a folder for each data source within this directory (i.e. ACD, WFM, Staffing, etc.)
- CIC CaaS files will be automatically stored in this location weekly

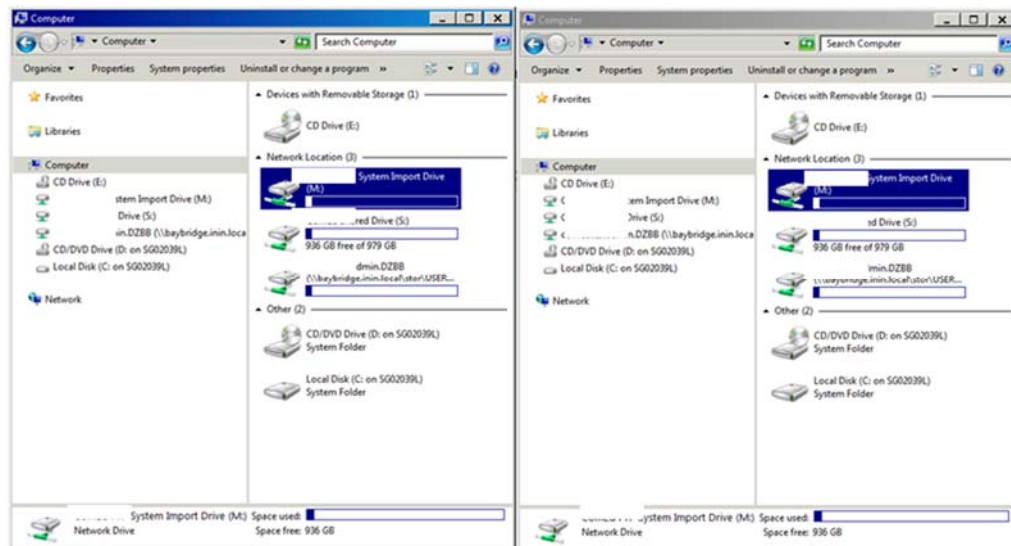
Citrix Only - Copying files to and from the Decisions Cloud environment

Using the file explorer in the cloud environment, files can be copy and pasted between the cloud drives (U, S, and M) and your local machine. Files can be moved within a single instance of the file explorer. The recommended best practice for copying files to and from the cloud is to utilize two instances of file explorer and is outlined below. Please note:

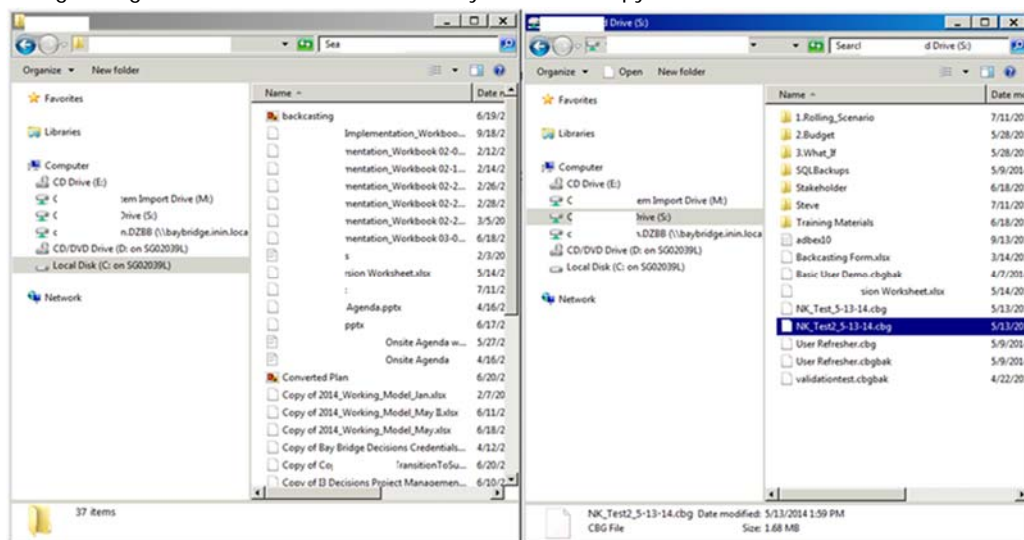
- File explorer must be opened from within the cloud environment, not your local machine
- The Favorites and Shortcuts do not work in the Citrix file explorer

Step by Step Instructions: Copying Files to/from the Cloud

1. Open two explorer sessions of the Citrix file explorer



2. Using the left session find the file location you wish to copy to or from on the local disk
3. Using the right session find the file location you wish to copy to or from on the cloud



4. Click and drag the file from the location to the destination

Remote Desktop Services Only - Copying files to and from the Decisions Cloud environment

Using the file explorer in the cloud environment, files can be copy and pasted between the cloud drives (U, S, and M). Files can be copy and pasted between the Decisions import drive (M:) and a local computer by utilizing FTPS.

Please note:

- FTPS credentials are provided by the Interactive Intelligence project team
- An IP whitelist will need to be provided to Interactive Intelligence prior to using the FTPS
- Most FTP applications can be used, please check with your company's specific IT policies and guidelines on which application to use.

File Management

Depending on the specific contract, each environment is set up with at least 30 GB of data.

A best practice will need to be established on maintaining, organizing and archiving files in the cloud environment.