GENESYS CLOUD

AirBNB Quick Start Guide

Contents

Purpose

This document provides a reference guide that allows Genesys customers to get up and running quickly using Genesys Cloud.

More detailed documentation on the specific capabilities available through Genesys cloud is available through the Genesys Cloud portal.

Terms & Abbreviations

Term used in Genesys	Explanation
Agent	A contact center agent
Supervisor	A contact center supervisor that manages a team of agents
Administrator	A contact center administrator responsible for more advanced IT related configuration tasks
GA	Genesys Administrator
GAX	Genesys Administrator Extensions
WFM	Workforce Management

Access to user interfaces

The main access to all Genesys Cloud capabilities is provided through the Genesys Cloud Portal:
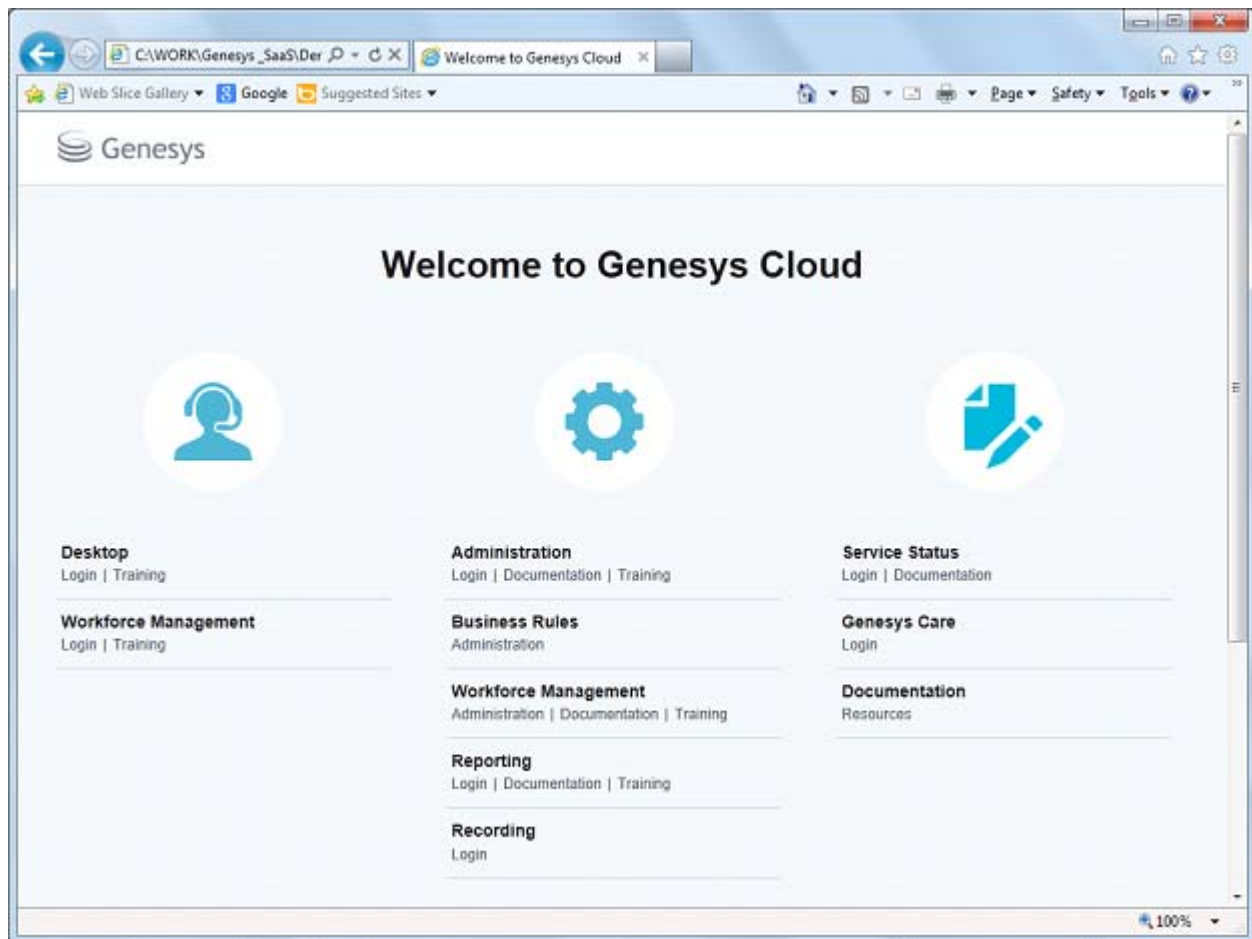
From the portal users are able to access the specific tools and interfaces required to perform all the standard tasks within Genesys Cloud.

Agent Desktop

Access:

The Agent Desktop is a web based desktop that is used to manage the agent state and contact center interactions. The desktop can be accessed through a link on the Portal: Genesys Desktop. The desktop may also be accessed as a direct link from the customer's environment.

Login:

To login to the desktop the agent must enter three pieces of information:

- User name: <supplied username>
- Password: <supplied password>
- Place: empty

Documentation:

Online help is available from within the Desktop.

Training:

Online training for the Desktop is provided on the Cloud Portal: Agent Desktop Training

Workforce Management Agent

The Workforce Management Agent interface allows contact center agents to view their current work schedule as well as perform standard planning tasks such as requesting time off.

Access:

The WFM Agent interface can be accessed through a link on the Portal: WFM Agent.

Login:

- User name: <supplied username>
- Password: <supplied password>

Documentation:

Detailed documentation on Workforce Management is available online from within the WFM application**.**

Training:

Online Workforce Management for Agent training can be directly accessed from the Portal: WFM Agent Training

Workforce Management Supervisor

The Workforce Management Supervisor interface allows both contact center supervisors and WFM supervisors to make a variety of day to day tasks such as approving time-off, generating schedules, modifying schedules, and viewing agent adherence.

Access:

The WFM Supervisor interface can be accessed through a link on the Portal: WFM Supervisor.

Login:

- User name: <supplied username>
- Password: <supplied password>

Documentation:

Detailed documentation on Workforce Management is available online from within the WFM application. Also [WFM Supervisor](#) documentation on the Portal.

Training:

Posted on the Portal: Online Workforce Management for Agent training can be directly accessed from the Portal.

Workforce Management Configuration

The Workforce Management Configuration interface allows WFM administrators to perform additional detailed tasks such as modifying the underlying Workforce planning parameters used for activities such as forecasting and scheduling.

Access:

The WFM Configuration Utility can be accessed through a Citrix XenApp interface posted on the Portal: [WFM Configuration - Citrix](#). All WFM administrators have access to this interface. Currently access is limited to five concurrent user sessions

Login:

Citrix login:

To utilize Citrix you need to first download and install the latest Citrix receiver from receiver.citrix.com

To login to Citrix enter:

- User name: <First letter of the first name>+<last name> (e.g. wkolb)
- Password: <will be provided>

The password will be changed on the first login

WFM Configuration Utility login:

Once you have logged in to Citrix you will login to the WFM Configuration using your provided Genesys login credentials:

- User name: <supplied username>
- Password: <supplied password>
- Application: WFM_Client
- Host Name: <specified hostname>
- Port: 8888

Documentation:

Online help is available in the application.

Administration

Access:

Access to common Administration tasks is provided through a link on the Portal: <u>Genesys Administrator Extensions</u> – available to all administrators, supervisors, managers. The actual administrative tasks you can perform will vary based upon your role and access rights.

Another Administration interface (Genesys Administrator) is used for certain configuration tasks (such as adding DN extensions, Agent Logins and can be launched from the Preferences menu in the Genesys Administrator Extensions (cog symbol at the upper right corner).
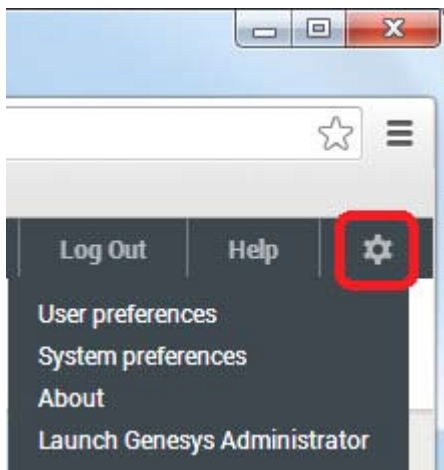
Login:

- User name: <supplied username>
- Password: <supplied password>

Documentation:

Online help can be accessed both in the application and directly from the Portal.

Training:

Online training can be directly accessed from the Portal: <u>Administrator Training</u>

IVR Administration

Access:

A separate Administration interface is provided to manage parameters for routing strategies and IVR applications. Access to the IVR Administration interface is provided through a link on the Portal: Genesys Administrator Extensions – available to all IVR administrators

Login:

- User name: <supplied username>
- Password: <supplied password>

Documentation:

Online help can be accessed both from the application and by selecting documentation from the Portal.

Training:

Online training can be directly access from the Portal: Administrator Training

Historical Reporting

Historical Reporting provides both detailed and summary information on customer interactions managed by Genesys (voice calls, email, web chat) as well as agent behavior.

Access:

Access to the Historical Reporting interface (Genesys Interactive Insights) is provided on the Portal: Genesys Interactive Insights – available to all supervisors and managers

Login:

Historical Reporting currently uses a different login and password from the other Genesys interfaces.

- User name: <Historical Reporting provided login>
- Password: <to be provided – will be changed on the 1st login>

Documentation:

Online documentation on historical reporting is directly available on the Portal: Reporting

Training:

Online training can be directly accessed from the Portal: Reporting Training

Real Time Reporting

Access:

Access to the Real Time Reporting interface (EZPulse) is accomplished through Genesys Administrator link provided on the Portal: Genesys Administrator Extensions. Real Time Reporting is available to all administrators, supervisors, managers. The reporting interface is then invoked from the "Reports/EZPulse/Dashboard" menu. Users will only have access to the reports related to the agents, agent groups and queues that they are part of.
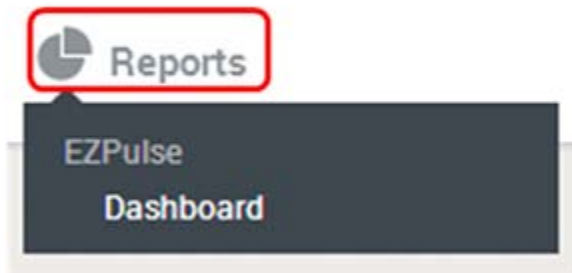
Login:

- User name: <supplied username>
- Password: <supplied password>

Documentation:

Administration documentation on Real Time Reporting is available from the Portal.

Call Recording

The Call Recording interface allows user to search, view, and play back recorded calls.

Access:

Access to the Call Recording is provided through a link on the Portal: Call Recording. Access is given to all administrators, supervisors, managers

Login:

- User name: <supplied username>
- Password: <supplied password>

Documentation:

Call Recording documentation is available on the Portal

Service Status

The Service Status shows the overall performance of the system and provides information about scheduled maintenance.

Access:

Access to Service Status is provided on the Portal: Service Status and available to all administrators and supervisors

Login:

- User name: <supplied username>
- Password: <supplied password>

Documentation:

Service Status documentation is available from the Portal

Genesys Care

The Genesys Care link from the Portal provides direct access to Genesys Cloud support.

Access:

Access to the Genesys Care interface to log trouble tickets and change requests is made available to all personnel that are designated contacts within the Genesys Care interface. A list must be provided to Genesys prior to UAT and access will be granted. New requests for access may be requested via the Portal: Genesys Care

Login:

- User name: <provided separately>
- Password: <provided separately>

Documentation

Access:

    The link to all documentation resources is provided on the Portal: [Documentation Resources](#)

Common Administration Tasks

Provision new Agent

Provisioning a brand new agent consists of the following seven steps:

Step 1. Create new DN Extension

1. Login to [Administration](#) interface using administrator account

2. Launch Genesys Administrator from the Preference menu (keg at the upper right corner)

3. Go to "Switching/Switches"

4. Double click "SIP_Switch" on the right panel

5. Go to "DNs" tab

6. Navigate to the target branch Folder (AirBNB, AirBNB FCR, AirBNB CPM)

7. Press "New"

8. Enter agent's LDAP IPPhone attribute value in the Number field

9. Select "Extension" in the Type field

10. Expand "Advanced" tab

11. Enter agent's e-mail in the Alias field

12. Click "Save and Close"

Step 2. Create new Agent Login

1. While still being in the "SIP_Switch" property sheet, go to "Agent Logins" tab

2. Navigate to the target branch Folder (AirBNB, AirBNB FCR, AirBNB CPM)

3. Press "New"

4. Enter agent's LDAP IPPhone attribute value in the Code field

5. Click "Save and Close"

Step 3. Allocate a Place for new Agent and associate DN Extension

1. While still being in Genesys Administrator interface , go to "Switching/Places"

2. Navigate to "AirBNB/Reserve" folder

3. Select the next first available Place (named "airbnb-xxx")

4. Press "Edit"

5. Change Name to the Agent's e-mail address

6. Click on "Add" button next to "DNs" field

7. Navigate to the DN Extension created on Step 1 and select it

8. Press "Save and Close"

9. Press "Move to Folder"

10. Select target branch Folder (AirBNB, AirBNB FCR, AirBNB CPM) and complete the move

11. Close Genesys Administrator window

Step 4. Create new Agent

1. Return to Genesys Administrator Extensions window opened at Step 1

2. Go to "System/User Accounts" menu

3. Press New (+)

4. Enter agent's e-mail in the User Name (add ".agent" suffix if this is an agent account for a supervisor/manager)

5. Make sure "Agent" checkbox is checked

6. Enter agent's first name in the First Name

7. Enter agent's last name in the Last Name

8. Leave E-mail address blank

9. Click on "Browse" under "Tenant and Folder". Navigate to the target team folder (Team 1, 2, 3...), select it. If no team assignment known, select the branch folder (AirBNB, AirBNB FCR, AirBNB CPM)

10. Enter agent's LDAP UID in the Employee ID (add "_agent" suffix if this is an agent account for a supervisor/manager)

11. Leave Password field blank

12. Repeat agent's LDAP ID in the External ID

13. Click "Save"

Step 5. Associate Agent with Skills, Login, Place

1. While still being in the agent's properties sheet, click on "Agent Information" tab

2. Click on Browse under the "Default Place" field. Navigate to the Place allocated on Step 3, select it

3. Click on Browse under the "Agent Logins" field. Navigate to the Agent Login created on Step 2, select it

4. Go to Skill Levels table. Press '+' to add new Skill Level

5. Click on Browse under the Skill field, select desired Skill

6. Enter desired numeric Level. Press Ok

7. Repeat 4-6 for all desired agent's skills

8. Press "Save"

Step 6. Add Agent to an Access Group

1. In Genesys Administrator Extensions go to "Accounts/User Access Groups"

2. Select "AirBNB Agent" Access Group

3. Scroll down to the bottom of Access Group Members and press Browse

4. Select an Agent created on Step 4

5. Press "Save"

Step 7. Add Agent to an Agent Group

1. In Genesys Administrator Extensions go to "Accounts/Agent Groups"

2. Select an Agent Group corresponding to the Agent's branch (AirBNB_AgentGrp, FCR_AgentGrp, CPM_AgentGrp)

3. Scroll down to the bottom of Agent Group Members and press Browse

4. Select an Agent created on Step 4

5. Press "Save"

Change Agent's Password

Done internally in AirBNB. No changes in Genesys applications required

Change Agent's Skills

1. Login to [Administration](#) interface using administrator, supervisor, or manager account

2. Go to "System/User Accounts" menu

3. Navigate to the Agent to be modified, click on the entry

4. Click on Agent Information tab

5. Modify Skill Levels table as needed

6. Press "Save"

Terminate an Agent

Agent's termination consists of disabling the corresponding user object in configuration

1. Login to Administration interface using administrator, supervisor, or manager account

2. Go to "Accounts/User Accounts", locate the target user

3. Click on "Disable" link

Provision new Supervisor/Manager

Step 1. Create new Supervisor/Manager

1. Login to Administration interface using administrator account

2. Go to "System/User Accounts" menu

3. Press New (+)

4. Enter supervisor's e-mail in the User Name

5. Make sure "Agent" checkbox is un-checked

6. Enter supervisor's first name in the First Name

7. Enter supervisor's last name in the Last Name

8. Leave E-mail address blank

9. Click on "Browse" under "Tenant and Folder". Navigate to the target folder for managers (such as 'CX Management'), select it or to the team folder for team leads (supervisors), such as Team 1 and select it

10. Enter supervisor's LDAP UID in the Employee ID

11. Leave Password field blank

12. Repeat supervisor's LDAP ID in the External ID

13. Click "Save"

Step 2. Assign Update permissions to Supervisor/Manager's own person
(This is needed in order to be able to save EZPulse dashboards)

1. While still in the Manager's edit panel, select Access Control from the action menu (triangle at the right top corner)

2. Click '+' to add new permission entry.

3. Select Object Type = User, locate this Supervisor/Manager's User object

4. Mark Read and Update access rights flag

5. Click "Save"

Step 3. Add Supervisor/Manager to Access Groups

1. In Genesys Administrator Extensions go to "Accounts/User Access Groups"

2. Select "AirBNB Managers" (for Managers = AirBNB Supervisors) or "AirBNB Supervisors" (for Supervisors = AirBNB Team Leads) Access Group

3. Scroll down to the bottom of Access Group Members and press Browse

4. Select a Supervisor created on Step 4

5. Press "Save"

6. Select the team Access Group that this particular supervisor/manager will manage (e.g. Team 1)

7. Scroll down to the bottom of Access Group Members and press Browse

8. Select a Supervisor created on Step 4

9. Press "Save"

10. If this is a manager (=AirBNB Supervisor), select appropriate site access group for Managers (such as AirBNB HQ Managers) and add this manager as described above

Step 4. Create an Agent person for supervisor/managers with dual role

1. Follow all steps described in Provision New Agent

2. Wherever person's e-mail is used for fields values (Agent's User Name, Place's Name, DN's alias), add ".agent" suffix to it

3. Add "_agent" suffix to Agent's EmployeeID

Step 5. Create an account to access Historical Reporting (if needed)

Submit Change Request with Genesys

Change Administrator's/Supervisor's/Manager's Password

Done internally in AirBNB. Also Change Request with Genesys required to change in non-LDAP systems: Genesys Care, Reporting, Citrix

Terminate Supervisor/Manager

Terminating Supervisor/Manager consists of disabling the user account (as described in Terminate an Agent) and also in removing supervisor/manager's account from all the Access Groups where he/she was added

Provision new Administrator/Terminate Administrator

Submit Change Request with Genesys

Provision new Team

Submit Change Request with Genesys

Manage Team

The following operations are possible with teams:

Rename a team –Administrator should rename corresponding Team Access Group and User Folder

Assign/remove team member – Administrator, Team Lead or Supervisor can either create a team member in some team or reassign existing members between the teams. In both cases, "Tenant/Folder" field should be used to assign appropriate team folder

Manage team members – Administrator, Team Lead or Supervisor can update team member properties, such as skills

Manage team supervisors/leads - Administrator, Team Lead or Supervisor can control who manage particular team by assigning members of the corresponding access group