Genesys Skills Assessor 8.0

Routing Guide

About Genesys

Alcatel-Lucent's Genesys solutions feature leading software that manages customer interactions over phone, Web, and mobile devices. The Genesys software suite handles customer conversations across multiple channels and resources—self-service, assisted-service, and proactive outreach—fulfilling customer requests and optimizing customer care goals while efficiently using resources. Genesys software directs more than 100 million customer interactions every day for 4000 companies and government agencies in 80 countries. These companies and agencies leverage their entire organization, from the contact center to the back office, while dynamically engaging their customers. Go to www.genesyslab.com for more information.

Each product has its own documentation for online viewing at the Genesys Technical Support website or on the Documentation Library DVD, which is available from Genesys upon request. For more information, contact your sales representative.

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*.

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Table of Contents

1 Preface

Welcome to the *Genesys Skills Assessor Routing Guide.* This guide has been designed to walk the user through how to use and navigate the Skills Assessor Routing application.

This document is valid only for the 8.0.1 releases of this product.

Note: For versions of this document created for other releases of this product, visit the Genesys Technical Support website, or request the Documentation Library DVD, which you can order by e-mail from Genesys Order Management at `orderman@genesyslab.com`.

For information about related resources and about the conventions that are used in this document, see the supplementary material starting on .

About Genesys Skills Assessor

Genesys Skills Assessor allows companies to use a combination of online tests, self assessment, and observational feedback to assess the level of agent skills across their contact centre. Agent skill levels are stored in a central skills database and can be combined with performance data from legacy systems, for example, CRM sales data, Learning Management System courses and so on.

Centralizing agent skills information allows contact centers to build a skills DNA profile for each agent to identify:

- What are the must have and nice to have skills for each job type.
- Who really knows what across the contact centre?
- Who has what skill and skill levels?
- Who requires what type of training and when.

SkillsRoute enables companies to create and manage multiple agents, skills, and skill level in Configuration Manager. Skill assessment results exported directly from Skills Assessor can be used to optimize multi-skilling and call routing, to ensure that the customer is always presented to the most knowledgeable agent available.

Intended Audience

This document is primarily intended for system administrators or other individuals who install the Genesys Skills Assessor.

Making Comments on This Document

If you especially like or dislike anything about this document, feel free to e-mail your comments to `Techpubs.webadmin@genesyslab.com`.

You can comment on what you regard as specific errors or omissions, and on the accuracy, organization, subject matter, or completeness of this document. Please limit your comments to the scope of this document only and to the way in which the information is presented. Contact your Genesys Account Representative or Genesys Technical Support if you have suggestions about the product itself.

When you send us comments, you grant Genesys a nonexclusive right to use or distribute your comments in any way it believes appropriate, without incurring any obligation to you.

Contacting Genesys Technical Support

If you have purchased support directly from Genesys, contact Genesys Technical Support at the following regional numbers:

Region	Telephone	E-Mail
North America and Latin America	+888-369-5555 (toll-free) +506-674-6767	support@genesyslab.com
Europe, Middle East, and Africa	+44-(0)-1276-45-7002	support@genesyslab.co.uk
Asia Pacific	+61-7-3368-6868 (International)	support@genesyslab.com.au
Malaysia	1-800-814-472 (toll-free) +61-7-3368-6868 (International)	support@genesyslab.com.au
India	1-800-407-436379 (toll-free) +61-7-3368-6868 (International)	support@genesyslab.com.au
Japan	+81-3-6361-8950	support@genesyslab.co.jp
Before contacting technical support, refer to the *Genesys Technical Support Guide* for complete contact information and procedures.		

Related Documentation Resources

The following resources provide additional information that is relevant to this software. Consult these additional resources as necessary.

- The *Framework 8.0 Configuration Manager Help,* which will help when using Configuration Manager.

Genesys

Consult these additional resources as necessary:

- The *Genesys Technical Publications Glossary,* which ships on the Genesys Documentation Library CD and which provides a comprehensive list of the Genesys and CTI terminology and acronyms used in this document.

- The Release Notes and Product Advisories for this product, which are available on the Genesys Technical Support website at `http://genesyslab.com/support`.

Genesys product documentation is available on the:

- Genesys Technical Support website at `http://genesyslab.com/support`.

Document Conventions

This document uses certain stylistic and typographical conventions—introduced here—that serve as shorthand for particular kinds of information.

Document Version Number

A version number appears at the bottom of the inside front cover of this document. Version numbers change as new information is added to this document. Here is a sample version number:

42gp_icg_aspect-wfm_08-2010_v4.2.001.01

You will need this number when you are talking with Genesys Technical Support about this product.

Screen Captures Used in This Document

Screen captures from the Configuration Manager graphical user interface (GUI), as used in this document, may sometimes contain minor spelling, capitalization, or grammatical errors. The text accompanying and explaining the screen captures corrects such errors *except* when such a correction would prevent you from installing, configuring, or successfully using the product. For example, if the name of an option contains a usage error, the name would be presented exactly as it appears in the GUI; the error would not be corrected in any accompanying text.

Type Styles

The Type Styles table describes and illustrates the type conventions that are used in this document.

Type Styles

Type Style	Used For	Examples
Italic	• Document titles • Emphasis • Definitions of (or first references to) unfamiliar terms • Mathematical variables Also used to indicate placeholder text within code samples or commands, in the special case where angle brackets are a required part of the syntax (see the note about angle brackets below).	Please consult the *Genesys Migration Guide* for more information. Do *not* use this value for this option. A *customary and usual* practice is one that is widely accepted and used within a particular industry or profession. The formula, $x + 1 = 7$ where x stands for . . .
Monospace font (Looks like `teletype` or `typewriter text`)	All programming identifiers and GUI elements. This convention includes: • The *names* of directories, files, folders, configuration objects, paths, scripts, dialog boxes, options, fields, text and list boxes, operational modes, all buttons (including radio buttons), check boxes, commands, tabs, CTI events, and error messages. • The values of options. • Logical arguments and command syntax. • Code samples. Also used for any text that users must manually enter during a configuration or installation	Select the `Show variables on screen` check box. In the `Operand` text box, enter your formula. Click `OK` to exit the `Properties` dialog box. T-Server distributes the error messages in `EventError` events. If you select `true` for the `inbound-bsns-calls` option, all established inbound calls on a local agent are considered business calls. Enter `exit` on the command line.

	procedure, or on a command line.	
Angle brackets (<>)	A placeholder for a value that the user must specify. This might be a DN or a port number specific to your enterprise. **Note:** In some cases, angle brackets are required characters in code syntax (for example, in XML schemas). In these cases, italic text is used for placeholder values.	`smcp_server -host` `<confighost>`

2 Routing Guide

Overview

This User Guide has been designed to walk the user through how to use and navigate the Skills Assessor Routing application.

This document will demonstrate how to create and manage People, Skills and Proficiency Levels in Genesys CME without the need for direct access.

Due to the integration between SkillsRoute and Genesys CME (7.5 and higher) the process is managed using Excel spreadsheets (this can also provide a natural 'roll back' if a master sheet is maintained and a separate sheet is used to make any amendments if the customer is amending skills and proficiency levels on an adhoc basis).

Prerequisites

The prerequisites for Skills Assessor Routing are:

- GIS 7.5 & CME 7.5 on the server
- .Net framework on the Client.

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Key Process Stages

The Key process stages are:

- Create an Excel spreadsheet.
    - o   It is recommended that at least two spreadsheets are used to manage this process with a Master sheet always containing the 'correct' information in case of a roll back situation. This can also be used for audit purposes.
- The format of the spreadsheet has to be as expected and is explained within the body of this document.
- Import the Excel spreadsheet through the Skills Import Wizard application.
- Any new User will be created in 'Persons' and can then be moved into the relevant Groups.

Creating a Spreadsheet

The spreadsheet must be created in the format as per the example below and be in Excel 97 – 2003 format file (.xls). The actual format of the information will be dictated by what is already in CME.

The Skill levels in the example below are displayed as Bronze, Silver and Gold, with the proficiency levels associated to the employee as 1, 2 or 3 (in this example 1 is the highest proficiency level).

The proficiency levels will be decided by the individual organization as used within their routing strategies.

	A	B	C	D	E	F	G	H	I	J	K	L
1	UserName	EmployeeID	FirstName	LastName	Folder	Billing	Loans	Spanish	CreditCard	CallHandling	Presentation	
2	A01	A01	Kristine	W	CustomerCare		4	1		2	1	
3	A02	A02	Macy	Stay	CustomerCare	2	2	9	3	3	1	
4	A03	A03	Martha	Wash	CustomerCare	4	2	8		2	5	
5	A999	A999	A	Test	CustomerCare		3	9		4		
6	A998	A998	B	Smith	CustomerCare				6			
7												
8												

Create a New Employee

To create a new employee, the employee details are entered under the first four column headings as per the example below and the format will be as per the existing information as expected in CME.

|	A	B	C	D	E	F	G	H	I	J	K	L
1	UserName	EmployeeID	FirstName	LastName	Folder	Billing	Loans	Spanish	CreditCard	CallHandling	Presentation	
2	A01	A01	Kristine	W	CustomerCare		4	1		2	1	
3	A02	A02	Macy	Stay	CustomerCare	2	2	9	3	3	1	
4	A03	A03	Martha	Wash	CustomerCare	4	2	8		2	5	
5	A999	A999	A	Test	CustomerCare		3	9		4		
6	A998	A998	B	Smith	CustomerCare				6			
7												
8												

Create a New Skill

To create a new Skill, this is included at the end of the spreadsheet after the Employee ID, First Name, Last Name and User Name and the proficiency level associated with the Skill is entered in the column against the relevant employee.

	A	B	C	D	E	F	G	H	I	J	K	L
1	UserName	EmployeeID	FirstName	LastName	Folder	Billing	Loans	Spanish	CreditCard	CallHandling	Presentation	
2	A01	A01	Kristine	W	CustomerCare		4	1		2	1	
3	A02	A02	Macy	Stay	CustomerCare	2	2	9	3	3	1	
4	A03	A03	Martha	Wash	CustomerCare	4	2	8		2	5	
5	A999	A999	A	Test	CustomerCare		3	9		4		
6	A998	A998	B	Smith	CustomerCare				6			
7												
8												

Managing Skills, Proficiency, and People in Genesys CME

Once the spreadsheet has been created and updated with the information, open the SkillsRoute application.
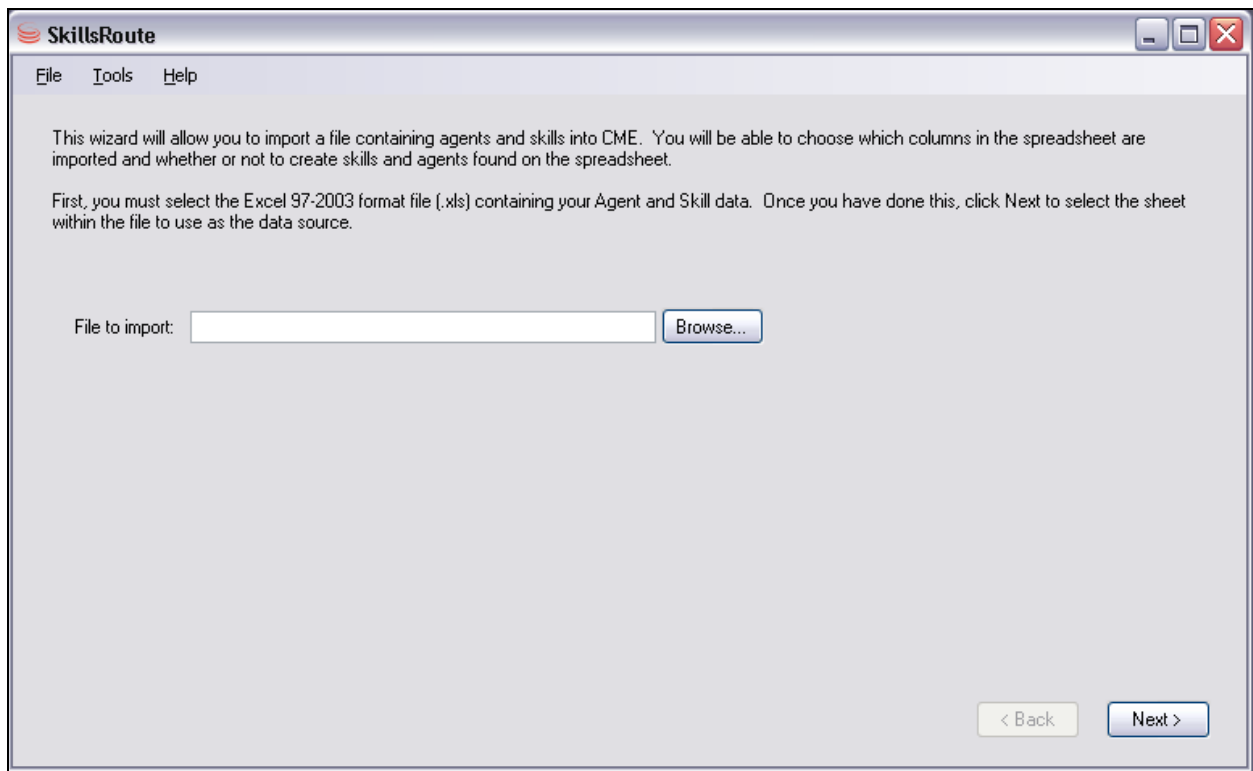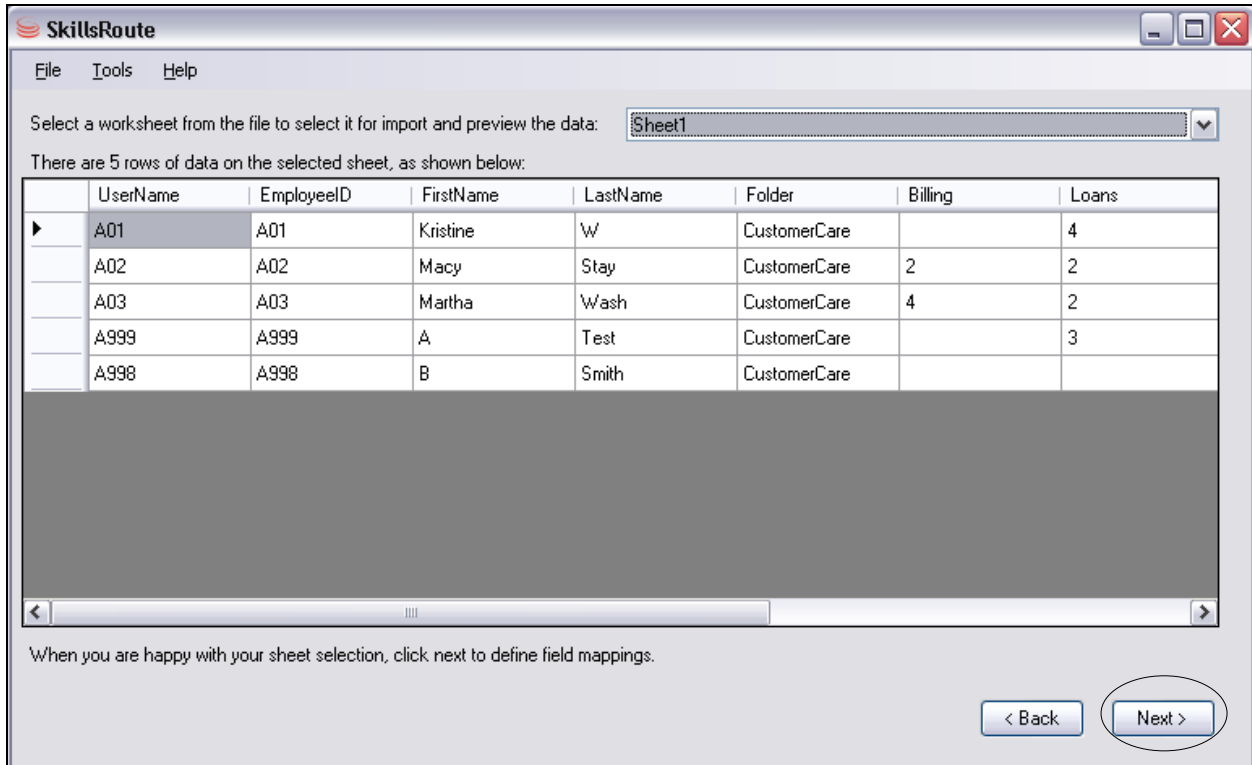

Use the Browse button to select the file to import.
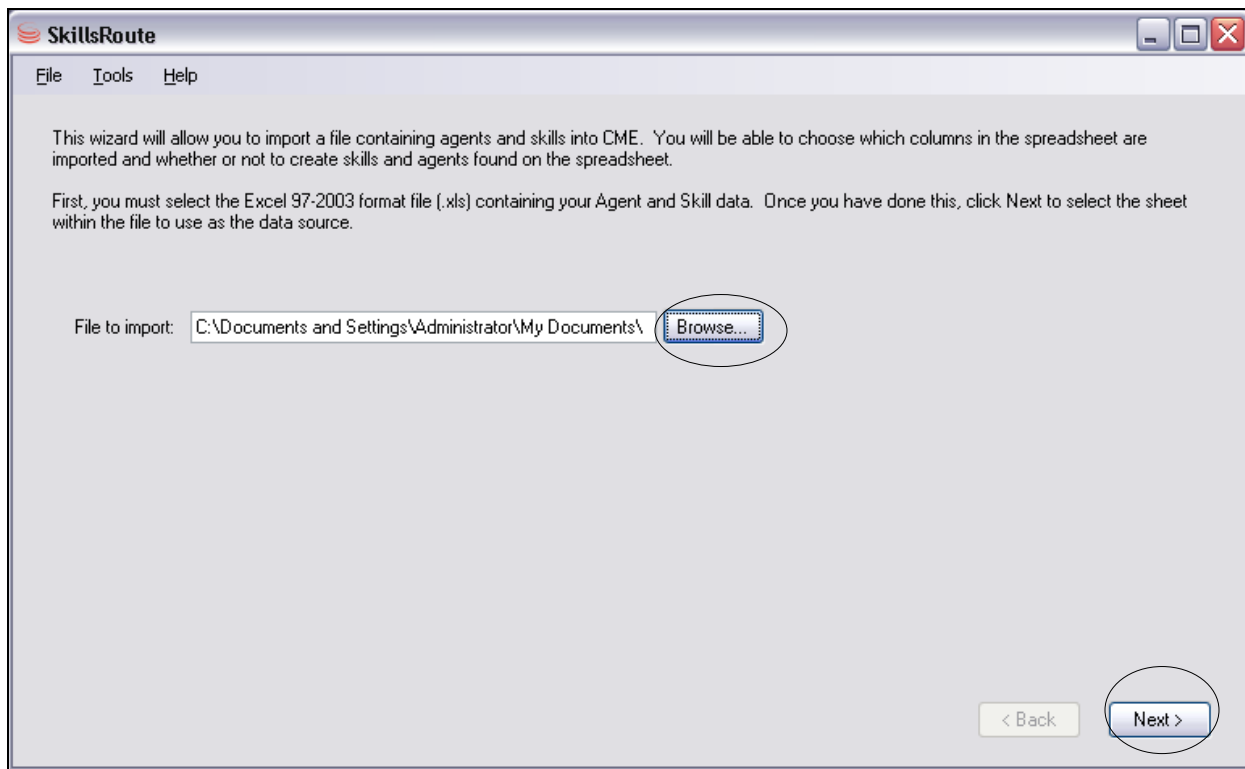
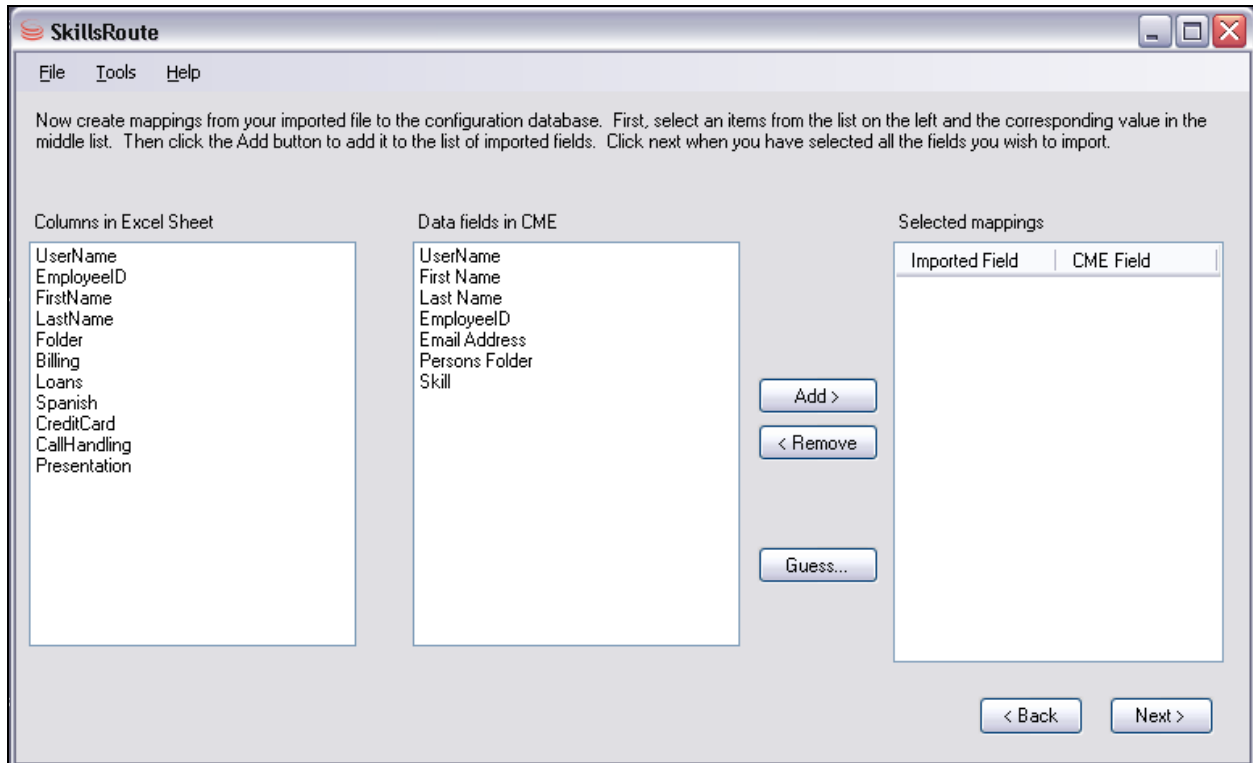Select Next to move on to the next step.

The spreadsheet information will then be visible to confirm that the correct spreadsheet has been selected.

If the spreadsheet selected is correct, click on Next to move to the next stage.

Mapping Data Fields

The information in the Excel spreadsheet and the data fields in CME, then have to be mapped.

Manually Map Data Fields

These fields can be mapped manually by highlighting the information in the 'Columns in Excel Sheet' and the associated field in 'Data fields in CME' and then selecting 'Add >'
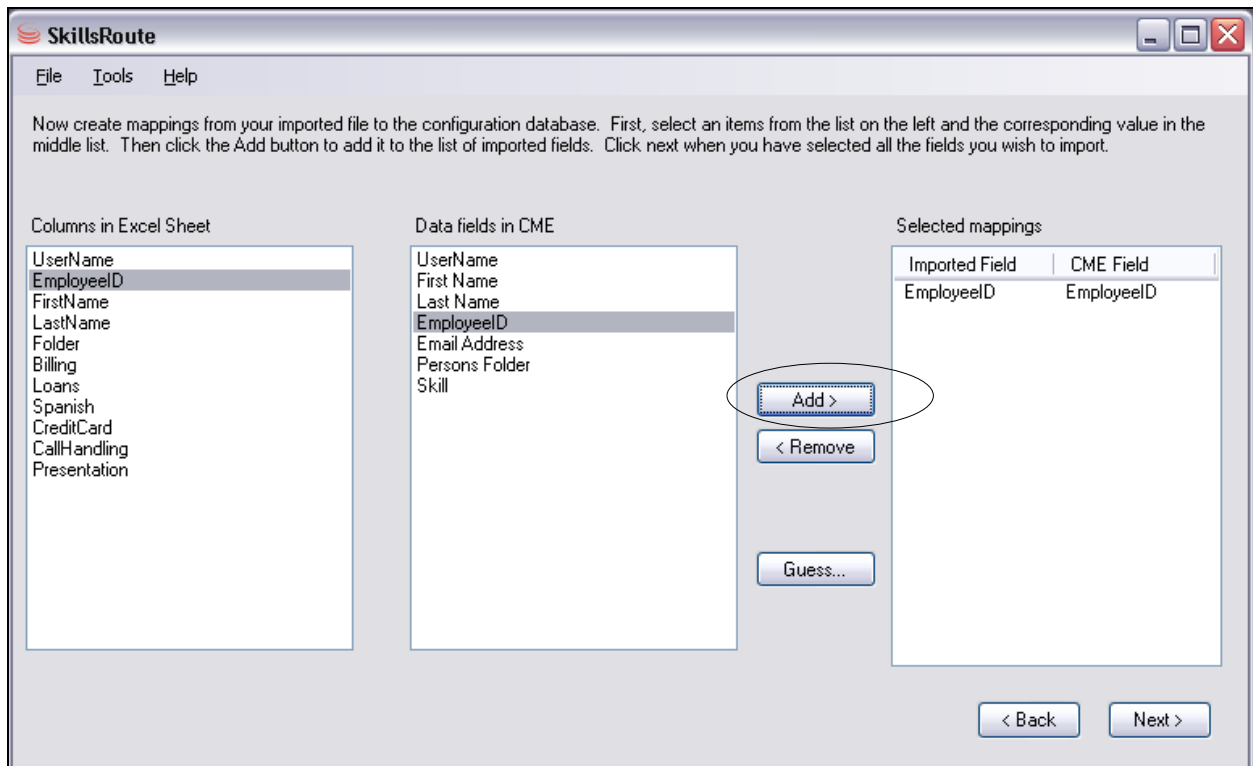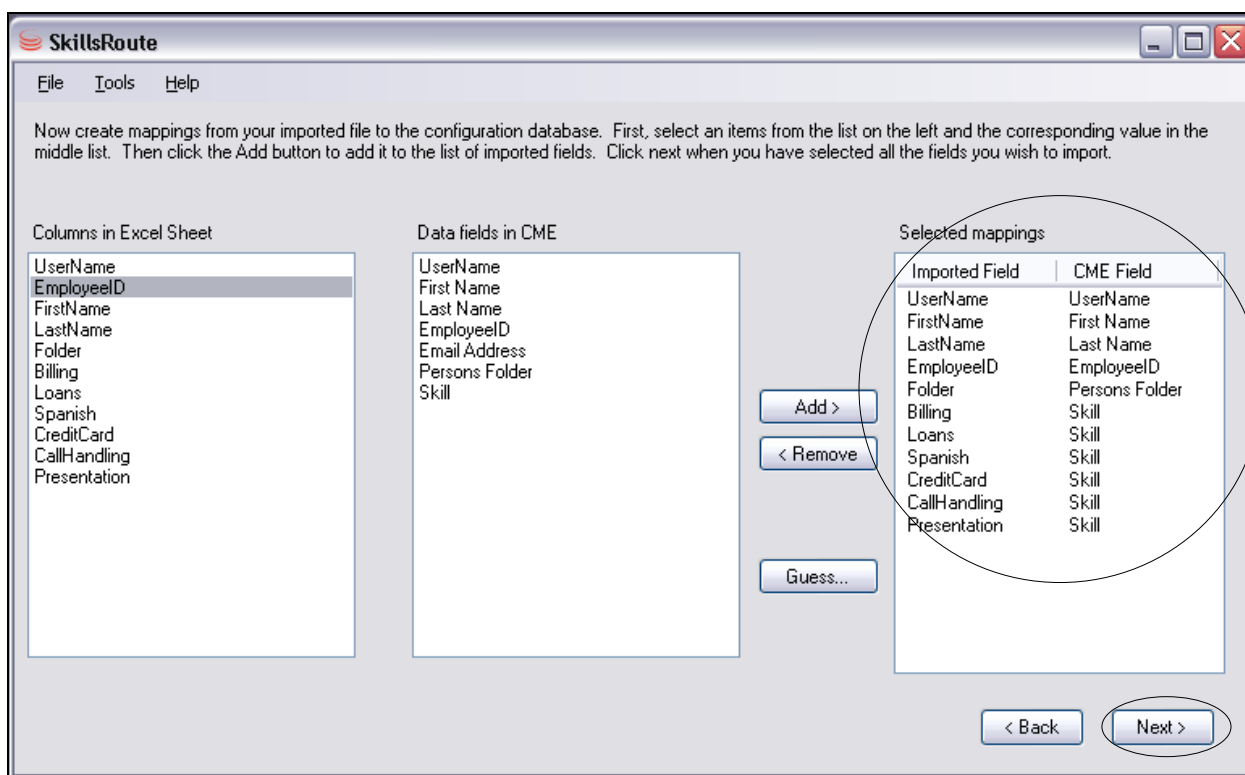

The remaining fields need to be manually mapped.

Automate Field Mapping

There is an option to automate the mapping process by selecting 'Guess...'

By selecting Guess...the application will map the fields it thinks are associated. We recommend that once this has been done check to make sure it is correct before committing the information into CME.
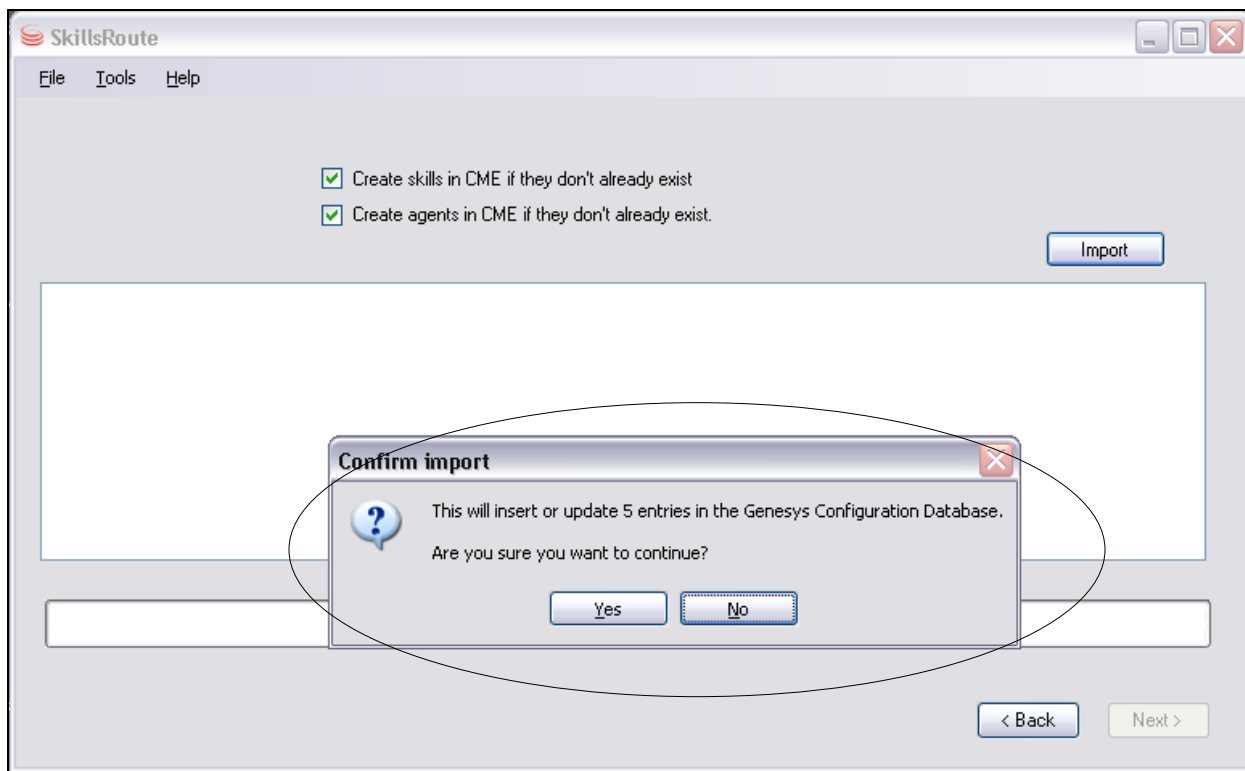

Once the information has been confirmed as correct, select Next to move to the next stage of the process.

Creating New Skills and New Agents in CME

If a new Skill or a new Agent has been included in the spreadsheet, then check the relevant box/s prior to importing the information.
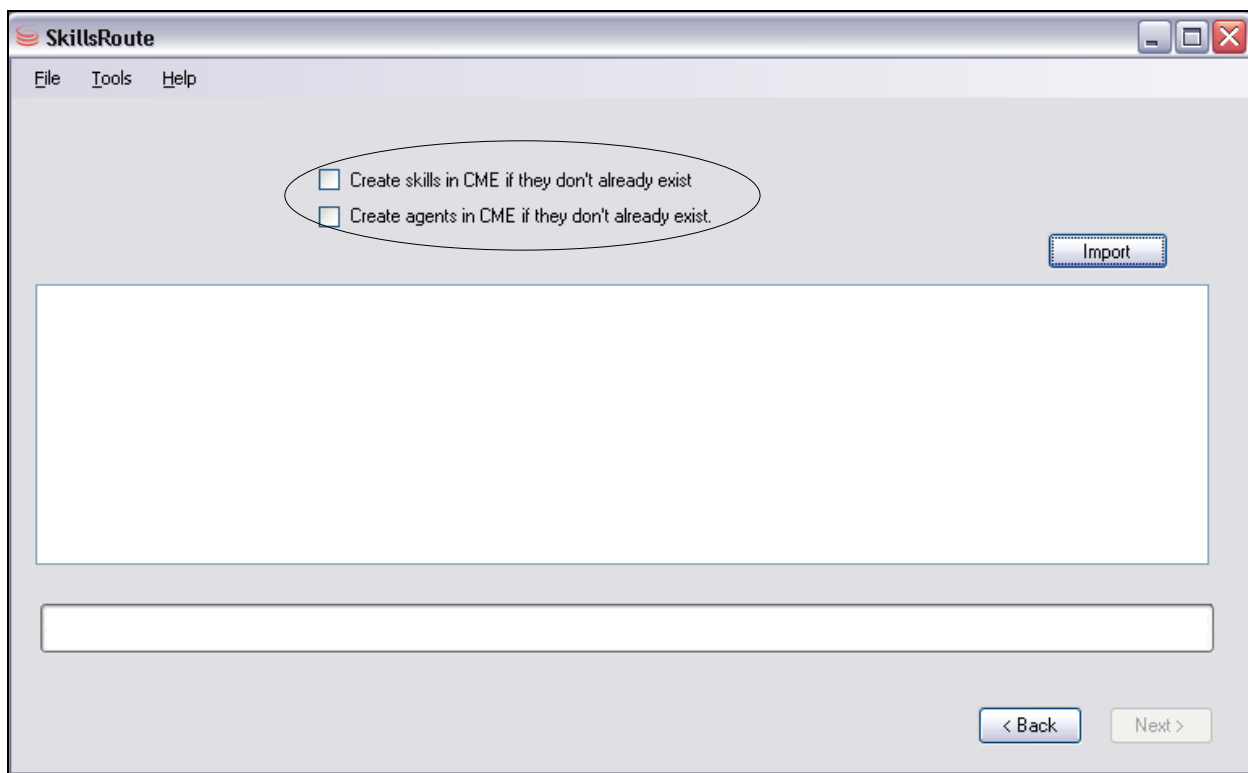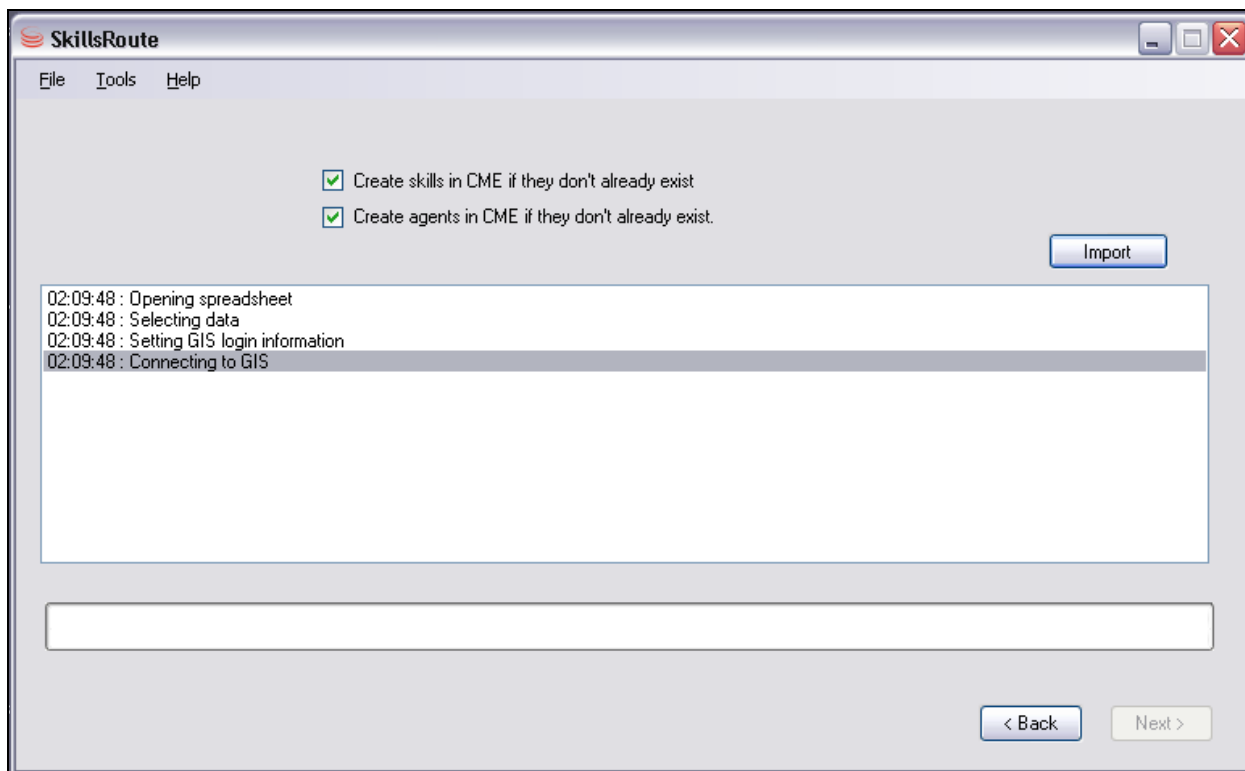

Select Import to import the spread sheet and update CME.

Confirmation will be requested by the application before completing the process.

The import has then been completed and CME has been updated.

The new users and/or skill and proficiency levels will now be visible in CME.