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Decisions Administration Guide

Changes and Modifications

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Changes and Modifications

This page describes how to make changes and modifications to your Decisions configuration once you have much or all of the initial configuration completed. All procedures on this page are completed in the **Configure/Review Settings** window in the Decisions administration module. Click the **Configure** button on the interface to open the **Configure/Review Settings** window.

Add a New Center

Complete the following steps in the order listed when adding a new center that has existing staff types in that center :

1. Click the **Configure** button to open the **Configure/Review Settings** window.
2. Click **1. Add/Edit Center** and follow the steps outlined in [Add a center](#).
3. Click **3. Assign Staff Type to Center** and follow the steps outlined in [Assign a staff type to centers](#) and identify the routing by following the steps in [Set up routing](#).
4. Add Center mappings for Headcount (Learning and Classroom, if using them), Shrinkage, and ACD imports. For more information, see [Data Mapping](#).

Add a New Staff Type

Complete the following steps in the order listed when adding a new staff type to an existing Center that will be taking an existing call type(s):

1. Click the **Configure** button to open the **Configure/Review Settings** window.
2. Click **2. Add/Edit Staff Type** and follow the steps outlined in Section [Add a staff type](#).
3. Click **3. Assign Staff Type to Center** and follow the steps outlined in [Assign a staff type to centers](#) and identify the routing by following the steps in [Set up routing](#).
4. Add Staff Type Mappings for Headcount (Learning and Classroom, if using them), Shrinkage, and ACD imports. For more information, see [Data Mapping](#).

Add a New Contact Type

Complete the following steps in the order listed when adding a new contact type to an existing contact group that will route to an existing staff type:

1. Click the **Configure** button to open the **Configure/Review Settings** window.
2. Click **5. Add/Edit Contact Type** and follow the steps outlined in [Add a contact type](#).

3. Click **7. Edit Contact Routing** and follow the steps outlined in [Set up routing](#).
4. Import ACD file(s). For more information, see [Importing Data](#).
5. Add Contact Type mappings. For more information, see [Data Mapping](#).
6. Create a simulation. For more information, see [Create Simulations](#).

Split a Center and Staff Type

Complete the following steps in the order listed when splitting out a center and staff type.

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.

1. See if the data for the centers and staff types is split out already.
2. Determine if the Site Id and agent group identifier (AGI) 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.

1. If the data is *not* already split out, you will need to create a unique identifier for the new center and staff type in the data feed.
2. Decide if the original center and staff type will keep the same name or if they will be renamed.
3. If they will be renamed, then this can be done by clicking **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 **2. Add/Edit Staff Type**).
4. Add a new center and a new staff type. For more information, see [Add a center](#) and [Add a staff type](#).

Split a Contact Type

Complete the following steps in the order listed when splitting a contact type into two contact types.

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.

1. 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.

1. Decide if the existing contact type name will remain the same or if it will need to be changed.
2. If the existing contact type name will not be used, then change the contact type name by clicking **5. Add/Edit Contact Type** and entering the new name in the **Name** column over the old name.
3. Add a new contact type. For more information, see [Add a contact type](#).

Merge Centers

Complete the following steps in the order listed when merging two centers into one:

1. Determine which center will be deleted and if the remaining center will keep the existing name or will need to be renamed.
2. If the remaining center will need to be renamed, click **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 set up 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. 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, then see [Data Mapping](#) for instructions about how to map data.

Merge Staff Types

Complete the following steps in the order listed when merging two staff types into one:

1. Determine which staff type will be disabled and if the remaining staff type will keep the existing name or will need to be renamed.
2. If the remaining staff type will need to be renamed, click **2. Add/Edit Staff Type** and type the new name over the existing staff type name.
3. Highlight the staff type that is to be removed and click 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.

1. Update the staff type mappings for Headcount, Shrinkage, and ACD imports. For more information, see [Data Mapping](#).

Merge Contact Types

Complete the following steps in the order listed when merging two contact types into one:

1. Determine which contact type will be disabled and if the remaining contact type will keep the existing name or will need to be renamed.
2. If the remaining contact type will need to be renamed, click **5. Add/Edit Contact Type** and type the new name over the existing contact type name.
3. Highlight the contact type that is to be removed and click the **Enable/Disable** button. This will remove the contact type from the configuration.
4. Similar to merging a center, as soon as the contact type has been disabled, it will be removed from all assignments.
5. Import merged ACD data. For more information, see [Importing Data](#).

6. Update the contact type mapping. For more information, see [Data Mapping](#).
7. Build a new simulation model. For more information, see [Create Simulations](#).