Decisions Administration Guide

Decisions 9.0.0

12/30/2021

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Decisions Administration

Genesys Decisions is a strategic planning tool designed specifically to help contact centers make better plans and budgets. This document describes 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, perform the configuration in the order in which the topics are listed in this document.

After you set up a new configuration, then users can log in to the Genesys Decisions Planning application and begin building scenarios.

This guide is intended for system administrators, network engineers, and others who will use the Decisions Administration application to configure the Decisions user applications. The guide is valid for 9.0 releases of the Genesys Decisions applications.

See the *Genesys Decisions Deployment Guide* for installation instructions and system requirements.

Create Configuration

To open the Genesys Decisions Administration application, click **Configuration** on the Decisions main landing page.

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

Setting up a New Configuration

Once you are logged in to the Administration application, click the **Configure** button to open the **Configure/Review Settings** window and perform the following tasks in order:

- Add a center.
- Add a staff type.
- Add a staff type to centers.
- Add a contact group.
- Add a contact type.
- Add email/casework buckets.

- Set up routing.

You can also configure the Administration application using the menus above the icons.

Add a Center

A center is typically the physical location for each of the staff types (groups of agents), which can also include virtual or “At Home” agents. The center grouping allows for more detailed historical data that can highlight performance differences in each center (such as AHT, shrinkage, attrition, and hiring plan), as well as more detailed forecasting.

To add a Center:

1. Click **1. Add/Edit Centers**.
2. Click the green Add button.
   A blank cell will be created in the table.
3. In the blank cell, add the new center name in the name column.
4. Continue performing the previous 3 steps until all desired centers are added.
5. Click the Save button and close the window by clicking the X at the top right corner or by clicking the Close button.

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.

To add a Staff Type:

1. Click **2. Add/Edit Staff Types**.
2. Click the green Add button.
   A blank cell will be created in the table.
3. In the blank cell, add the new staff type name in the name column.
4. Continue performing the previous 3 steps until all new staff types are added.
5. Click the Save button and close the window by clicking the X at the top right corner or by clicking the Close button.

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.

To assign a Staff Type to a Center:

1. Click **3. Assign Staff Type to Centers**.

2. Select a center from the center list.
3. 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.
4. Select the next center from the list and perform the same steps.
5. Once all the staff types have been assigned to the appropriate centers, close the window by clicking the close icon. You can also click the Save button at any time to save your current changes.

Add a Contact Group

A Contact Group is a combination of one or more contact types that are routed to one or more staff types.

To add a Contact Group:

1. Click **4. Add/Edit Contact Groups**.
2. Click the green Add button.
   A blank line will be created in the table.
3. Add the new contact group name.
4. If the contact group is a Multi-Skill with Priority configuration (see Set up Routing), 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).
5. Continue performing the previous 3 steps until all new contact groups are added.
6. Click the Save button and close the window by clicking the X at the top right corner or by clicking the Close button.

Add a 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.

1. Click **5. Add/Edit Contact Type**.
2. Click the green Add button.
   A blank line will be created in the table.
3. Perform the following steps:
   1. Enter the new contact type name in the Name column.
   2. Select the appropriate contact group from the drop-down list.
   3. Select the appropriate media type from the drop-down list.
   4. Enter the SVL, ASA, Abandon Rate, Max Extra Time and Max Under Time goals.
   5. If the new contact type is Multi-Skill with priority, then enter the Call Priority for that contact type (see Set up Routing).

4. Click the Save button and close the window by clicking the X at the top right corner or by clicking the Close button.

Add Email/Casework Buckets

If your configuration consists of either an Email or Casework (or both) contact type(s), you will need to set up the backlog and handled within buckets. There are eight 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.

> ### Tip
> The upper bound for each bucket should match the upper bound for each bucket in the historical data feed.

To add an Email or Casework Bucket:

1. Click **6. Edit Email & Casework Buckets**.
2. Select the contact group and media types from the appropriate drop-down lists.
3. Select either Hours or Days from the Time Unit drop-down list.
4. In the Upper Bound column enter in the number of hours or days for each bucket.
5. Click the radio button in the Service Level Threshold column to select the service level goal for the contact type.
6. Click the Save button and close the window by clicking the X at the top right corner or by clicking the Close button.

Set up Routing

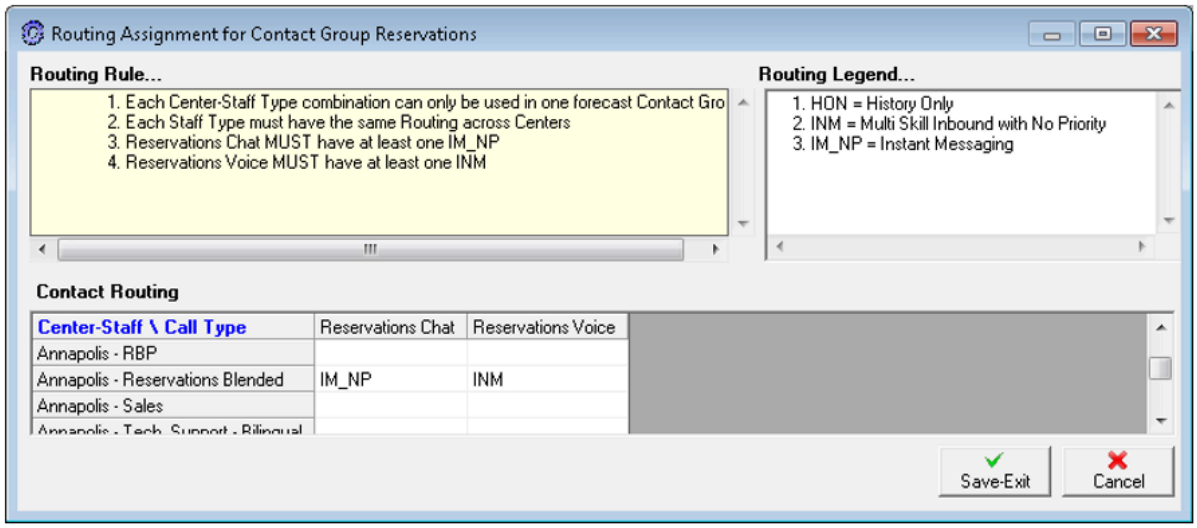
Now that all the centers, staff types, contact groups and contact types have been created, you must indicate which contact types route to which staff types and centers:

1. Click **7. Edit Contact Routing**.
   The Routing Type will default to Initial Setup.
2. Select the Contact Group from the drop-down list.
3. 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.
4. 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-

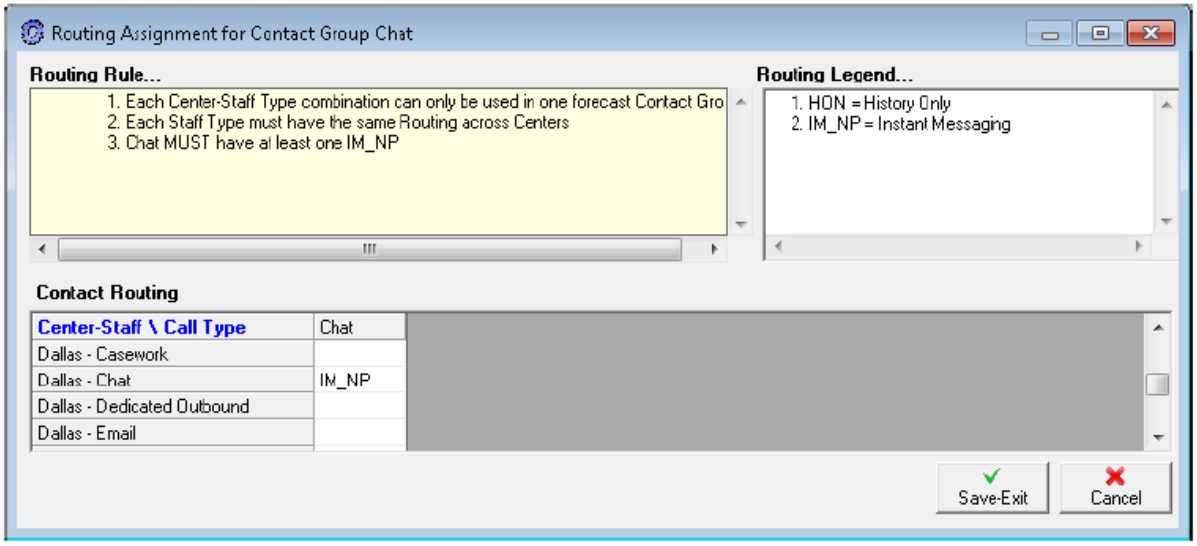
skill with priority.

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:

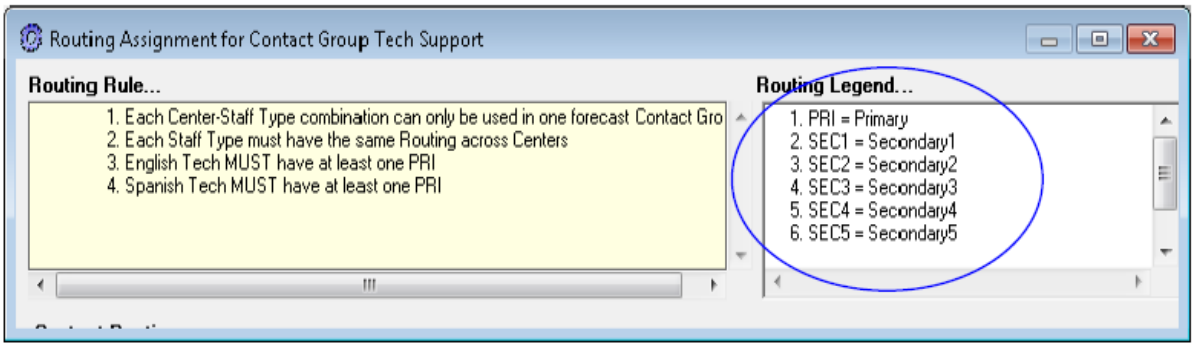
- Multi-skill equal priority example:



- Mulit-channel example:

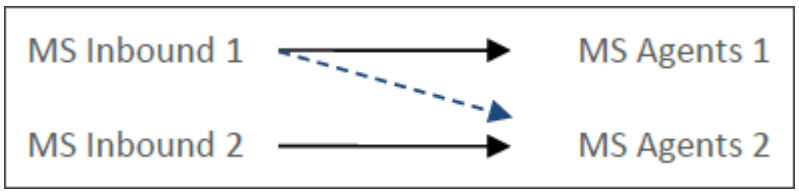


In a Multi-Skill with priority configuration, select from the following options from the drop-down list for each Center - Staff Type that contact types route to:

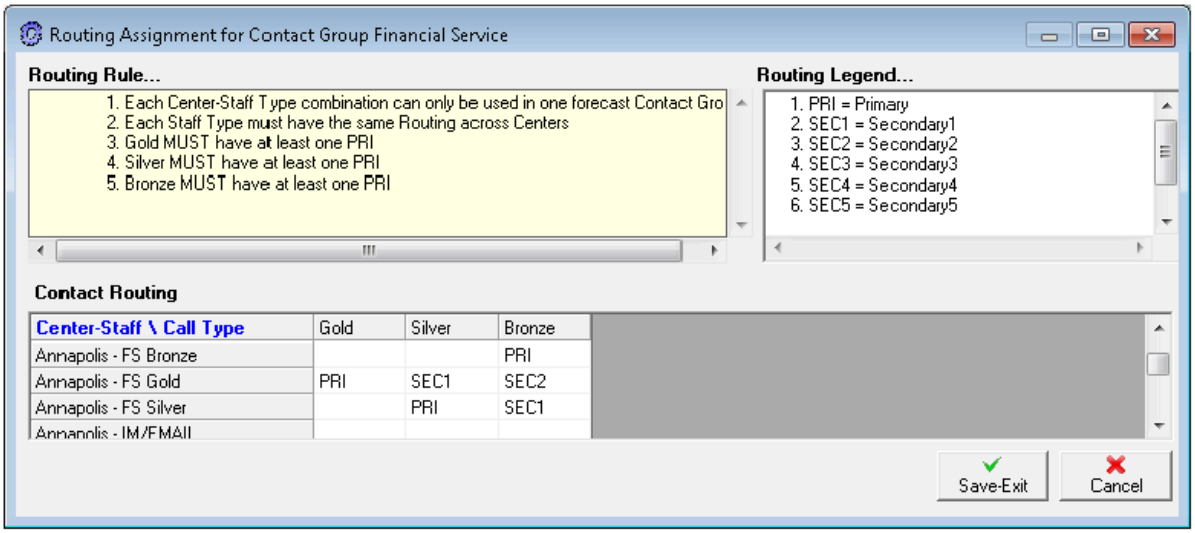


.

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 call type.



Multi-skill with priority routing example:



5. Once all contact types are routed to the appropriate center and staff types, click the Save-Exit button.
6. Select the next contact group and add the routing for all the contact types in that contact group.

Data Import and Mapping

Genesys Decisions uses three main data imports to populate actual history:

- Contact Data Import – This includes interval level contact data such as calls answered, calls abandoned, AHT, and so on. 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.

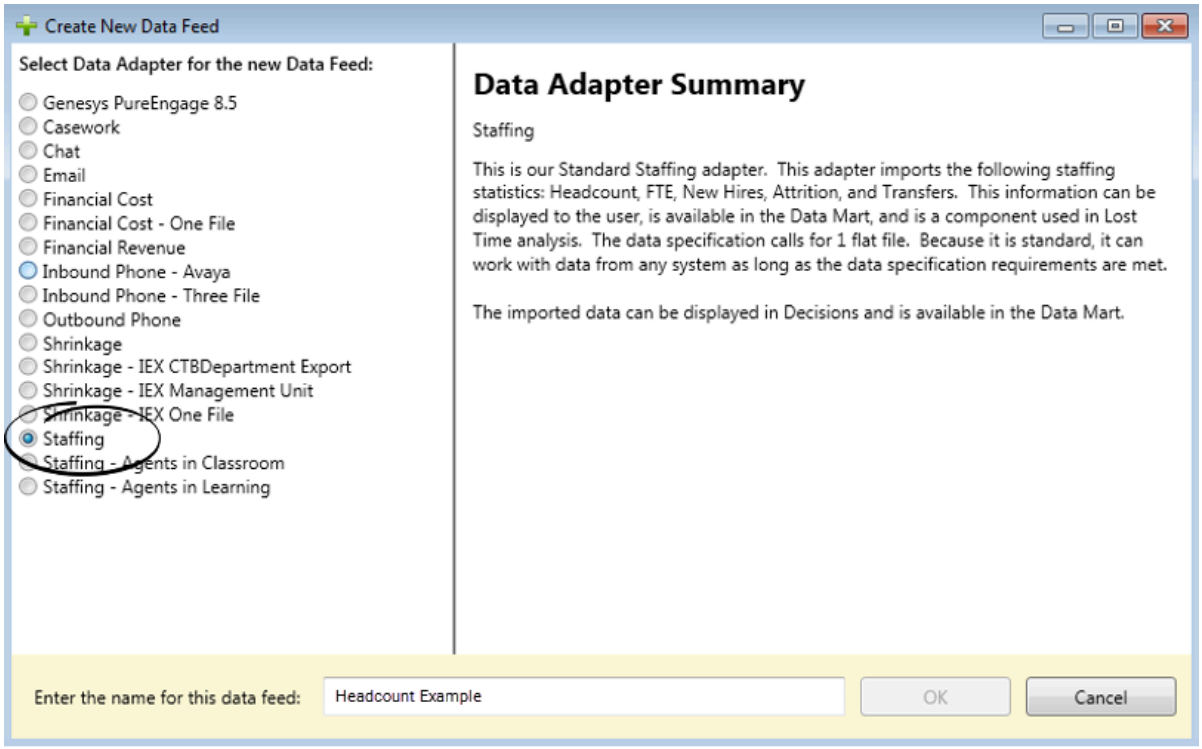
The import files are weekly flat files stored in a shared folder on the network. The files will need to be imported into the Admin application on a weekly basis.

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.

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 (that is, Learning, Shrinkage, and so on).

1. From the main screen, select **Import**.
2. Click the **Add** button in the next screen.
3. In the **Create New Data Feed** screen, choose the file type that you'd like to upload and give the data feed a name.



4. Select **OK**.
5. In the data source screen that appears, select **Browse** and navigate to the folder where your staffing files are saved.
6. In the **File naming pattern field**, enter the naming convention of the import file. The naming pattern that you enter 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

> ### Important
> Text needs to be separated by an underscore. Only numeric values will be accepted for the date. Nothing should be entered past the asterisk in the file naming pattern in Decisions.

- **Data starts on row** field: This will always be 2.
- **Field delimiter** radio buttons: Genesys strongly recommends the following delimiters for each type of

data file:

- 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, Genesys recommends that you 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**, you will receive confirmation as to whether the file extractor worked correctly based upon the inputs that you provided.
- You should perform this process for all their data files (that is, for shrinkage, learning, outbound, and so on).

> **Important**
>
> 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, you don't have read/write permissions to the folder where the files are stored, or if you don't have the correct permissions set up in the database.

Creating a Genesys Engage Data Feed

The Genesys Engage 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 Genesys Engage 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 Genesys Engage data feed, select the Genesys Engage 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.

Configure the Genesys Engage Contact Performance History

1. Select the Data Source for your contact performance data; either `Database` or `Files`.
2. Populate the sections below the Data Source selection drop-down menu to configure the Database source.
3. Populate the **Input Source** sections to configure the adapter to read Inbound, Outbound, and Chat history from predefined flat files, similar to the steps in the Creating New Data Feeds procedure, above.
4. Click the "Test" button to ensure the application can read data from the specified data source.
5. Click **Save** and exit the form, or follow the instructions below to configure Shrinkage History.

Configure the Genesys Engage Shrinkage History

1. Check the **Configure Shrinkage** box if you would like to configure shrinkage history using the Genesys Engage data feed.
2. Select the Data Source for your shrinkage data; either `Genesys Engage WFM` or `Files`
3. Populate the fields below the Data Source selection drop-down menu to configure the Genesys Engage WFM source or to configure the adapter to read shrinkage history from predefined flat files, similar to the steps in the Creating New Data Feeds procedure, above.
4. Click the **Test** button to ensure the application can read data from the specified data source.

> **Important**
>
> During the testing, you will be asked to enter Genesys Engage WFM system credentials.

5. Click **Save** and exit the form, or follow the instructions below to configure Agent Grouping History.

Configure the Genesys Engage Agent Grouping History

1. Select the Data Source for your agent grouping data; either `Genesys Engage WFM` or `Files`.
   If you select the Genesys Engage WFM source, the application will use the same WFM API configuration that was specified in the Shrinkage History to extract the Agent Grouping data.

   If you select `Files`, populate the Input Source section to configure the adapter to read the agent grouping history from predefined flat files, similar to the steps in the Creating New Data Feeds procedure, above.
2. Click **Save** and exit the form.

Importing Data

After you have configured all of your data feeds, the next step is to import all available data and add

all of the mappings for that data:

1. From the **Run Data Feeds** screen, select **New Data**.
   The 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).

2. Once New Data has been selected, click **Run**.
   A progress bar displays at the bottom of the screen.

   If you select **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 you to map your data.

Data Mapping

After the Data Feeds are configured, the data within the files needs to be mapped accordingly, which can be done in the window that generates when you run your data feeds. Alternatively, you can access the mapping screen by right-clicking the Data Adaptor under **Run** and selecting **Edit Current Mapping**.

1. Unmapped data appears on the lefthand side of the screen. To select which center and staff types to map to, you must select an unmapped center and staff type in order for the available mapping options to appear in the center of the screen.

2. After selecting unmapped data, the available centers and/or staff types available to map to will appear in the center of the screen. To continue the mapping process, select the center or staff type you wish to map by double-clicking on the already configured center and staff type in the middle of the screen.
   You can select multiple by holding the Ctrl key on the keyboard and then selecting the items on the screen.

3. After the center and staff types have been configured, they'll be reflected on the right side of the screen and you can select **Save Changes**.
   Once your changes have been saved, you will be returned to the **Data Feeds** screen and you will see a check mark validation that the import and import mapping were successfully completed.

4. To view the Validation Report which outlines the details of the imported data, select **Details**.
   Although all of the green check marks 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.

Troubleshooting Lost Time

Use the information on this page to understand the root causes of Lost Time within the Decisions configuration application and to validate the Lost Time value. Make sure that you perform the calculation exactly as it is shown and follow any steps in the order that they are listed.

Terminology and Definitions

The following table defines terminology used on this page.

Term	Definition
Lost Time	Agent time that is generally not accounted for in any of the data import feeds.
Negative Lost Time	More agents were on the phone than scheduled; in other words, staff on the phone > (scheduled agents +/- shrinkage).
Positive Lost Time	Less agents were on the phone than scheduled; in other words, staff on the phone < (scheduled agents +/- shrinkage).
Avg. Total Agents	The **Average Total FTE** field that is imported from the staffing import file.
Extra/Under Time	Extra and under time that is imported from the shrinkage import file. Extra time is additional time that agents are required to work beyond their normal schedule in FTE. Under Time is unpaid leave; that is, agents taking time off from their regular scheduled hours.
Imported Shrinkage	Shrinkage (that is, vacation, sick time, and breaks) that is imported from the shrinkage import file.
Inbound Staffed Agents	The number of agent FTEs handling interactions that are imported from the contacts import file. Inbound Staffed Agents also includes a portion of the agent available time associated with the call type that is imported from the agent import file.

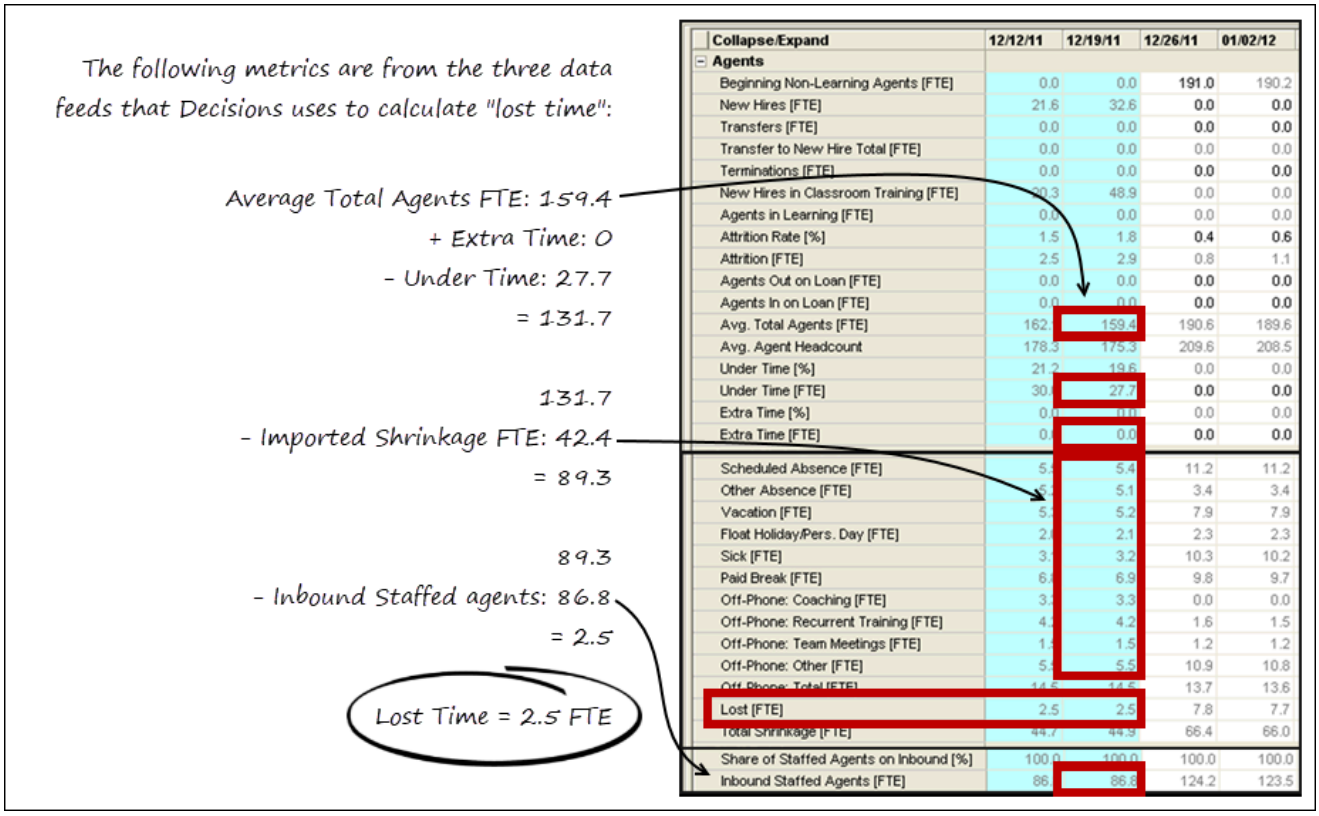
Calculations

Use the following mathematical expression to calculate Lost Time:
Average Total Agents FTE + Extra Time FTE − Under Time FTE − Imported Shrinkage FTE − Inbound Staffed Agents FTE =
Decisions Calculated Lost FTE

The mathematical expression to calculate Inbound Staffed Agents (FTE) is (Phone Time hours + Idle Time hours) / 40 hours. The 40 hours in the inbound staffed agents calculation is the default FTE hours setting for Decisions.

Example: Lost Time Calculation

The following figure shows the Lost Time calculation based on actual data. For information about validating and troubleshooting Lost Time, see Validating Lost Time.



Collapse/Expand	12/12/11	12/19/11	12/26/11	01/02/12
Agents				
Beginning Non-Learning Agents [FTE]	0.0	0.0	191.0	190.2
New Hires [FTE]	21.6	32.6	0.0	0.0
Transfers [FTE]	0.0	0.0	0.0	0.0
Transfer to New Hire Total [FTE]	0.0	0.0	0.0	0.0
Terminations [FTE]	0.0	0.0	0.0	0.0
New Hires in Classroom Training [FTE]	20.3	48.9	0.0	0.0
Agents in Learning [FTE]	0.0	0.0	0.0	0.0
Attrition Rate [%]	1.5	1.8	0.4	0.6
Attrition [FTE]	2.5	2.9	0.8	1.1
Agents Out on Loan [FTE]	0.0	0.0	0.0	0.0
Agents In on Loan [FTE]	0.0	0.0	0.0	0.0
Avg. Total Agents [FTE]	162.	159.4	190.6	189.6
Avg. Agent Headcount	178.3	175.3	209.6	208.5
Under Time [%]	21.2	19.6	0.0	0.0
Under Time [FTE]	30.	27.7	0.0	0.0
Extra Time [%]	0.0	0.0	0.0	0.0
Extra Time [FTE]	0.	0.0	0.0	0.0
Scheduled Absence [FTE]	5.	5.4	11.2	11.2
Other Absence [FTE]	5.	5.1	3.4	3.4
Vacation [FTE]	5.	5.2	7.9	7.9
Float Holiday/Pers. Day [FTE]	2.	2.1	2.3	2.3
Sick [FTE]	3.	3.2	10.3	10.2
Paid Break [FTE]	6.	6.9	9.8	9.7
Off-Phone: Coaching [FTE]	3.	3.3	0.0	0.0
Off-Phone: Recurrent Training [FTE]	4.	4.2	1.6	1.5
Off-Phone: Team Meetings [FTE]	1.	1.5	1.2	1.2
Off-Phone: Other [FTE]	5.	5.5	10.9	10.8
Off-Phone: Total [FTE]	14.	14.	13.7	13.6
Lost [FTE]	2.5	2.5	7.8	7.7
Total Shrinkage [FTE]	44.7	44.9	66.4	66.0
Share of Staffed Agents on Inbound [%]	100.0	100.0	100.0	100.0
Inbound Staffed Agents [FTE]	86.	86.	124.2	123.5

Validating Lost Time

Data integrity within Decisions is critical to ensure accurate outputs. To ensure that Lost Time is correct, validate the following three primary data feeds:

- Average Total Agents FTE
- Imported Shrinkage
- Inbound Staffed Agents FTE

For additional advice about troubleshooting, see the summary at the end of this section.

Average Total Agents FTE

Look for the following:

- Make sure that FTEs are not double-counted in the staffing import files. If they are double-counted, it could be due to duplicate Staff Type mappings.
- Make sure that agents in classroom training are not included in the Average Total Agents FTE.
- Make sure that agents that have completed classroom training and are now productive are included in the Average Total Agents FTE.

Validate the data format in the following staffing import files:

- Staffing
- Classroom
- Learning

Staffing Data Format Validation

	A	B	C	D	E	F	G	H	I
1	DATE_STAMP	SITE_IDENTIFIER	AGENT_GROUP_IDENTIFIER	LABOR_CATEGORY	HEADCOUNT	FTE	NEW_HIRES_FTE	ATTRITION_FTE	
2	2/15/2015	Tampa	Service	Agent	150	135		2	
3	2/15/2015	Tampa	Spanish	Agent	40	40	8		
4	2/15/2015	Tampa	Sales	Agent	79	75			
5	2/15/2015	Phoenix	Retention	Agent	80	80			
6	2/15/2015	Phoenix	Escalation	Agent	35	35			
7	2/15/2015	Phoenix	Service	Agent	120	120		1	
8									

To validate that the staffing import file is producing accurate data, verify the following requirements. The figure shows the fields described below, including sample data:

- Are there HEADCOUNT values?
- Is the FTE calculation correct compared to headcount (that is, are part-time agents being accounted for correctly or is everyone being depicted as full time)?
- Are FTE hours correct in the data source from which the file pulls the hours (for example, the data source might be set to calculate an FTE at 37.5 hours, so you would check to see if the staffing file is also doing calculations based on FTE=37.5 hours)?
- Are agents mapped to the correct center and staff type?
- Are all values in the **HEADCOUNT** field positive?
- Are all values in the **FTE** field positive? This ties directly into lost time.
- Are all values in the **NEW_HIRES_FTE** field positive (where applicable)?
- Are all values in the **ATTRITION_FTE** field positive (where applicable)?

Classroom Data Format Validation

	A	B	C	D	E	F
1	DATE_STAMP	SITE_IDENTIFIER	AGENT_GROUP_IDENTIFIER	REMAINING_CLASS_WK	FTE	
2	2/15/2015	Tampa	Service	2	19	
3	2/15/2015	Tampa	Spanish	3	12	
4	2/15/2015	Tampa	Sales	1	11	
5	2/15/2015	Phoenix	Retention	5	16	
6	2/15/2015	Phoenix	Escalation	0	0	
7	2/15/2015	Phoenix	Service	0	0	
8						

To validate that the classroom import file is producing accurate data, verify the following requirements. The figure shows the field described below, including sample data:

- Are all values in the **FTE** field positive?

Learning Data Format Validation

	A	B	C	D	E	F
1	DATE_STAMP	SITE_IDENTIFIER	AGENT_GROUP_IDENTIFIER	LEARNING_CURVE_WEEK	FTE	
2	3/15/2015	Tampa	Spanish	1	7	
3	3/15/2015	Tampa	Service	3	10	
4						

To validate that the learning import file is producing accurate data, verify the following requirements. The figure shows the field described below, including sample data:

- Are all values in the **FTE** field positive?

Imported Shrinkage

Look for the following:

- Make sure that each off-phone activity code is being used by agents and is not coded or mapped in the WFM tool.
- Make sure that no activity code mappings that are needed for the shrinkage import file are missing in the Administration application.
- Make sure that status mappings that are done outside of Genesys Decisions are correct.
- Make sure that cancelled off-phone activities are being removed from the agent's schedule in the WFM tool.
- Make sure that agents that are represented in the shrinkage file exactly match the list of agents in the staffing file.

Validate the data format in the following shrinkage import file:

- Off Phone

Off Phone Data Format Validation

	A	B	C	D	E	F	G
1	DATE	CENTER	STAFF_TYPE_NAME	OFF_PHONE_ID	OFF_PHONE_NAME	COUNT	
2	3/15/2015	Tampa	General Calls	Paid Break	Paid Break	180	
3	3/15/2015	Tampa	General Calls	Bank Holiday	Bank Holiday	288	
4	3/15/2015	Tamps	General Calls	Vacation	Vacation	144	
5							

To validate that the off-phone import file is producing accurate data, verify the following requirements. The figure shows the fields described below, including sample data:

- Are the **CENTER** values mapped to the Decisions Centers correctly in all files?
- Are the **STAFF_TYPE_NAME** values mapped to the Decisions Staff Types correctly in all files?
- Are all values in the **OFF_PHONE_ID** field positive?
- Are all values in the **COUNT** field positive?
  - Are values denoted in minutes?
- Is Extra Time (ET)/Under Time (UT) coming through on this file?

Inbound Staffed Agents FTE

Look for the following:

- Make sure that Available time is being populated correctly. Try reviewing occupancy to ensure it is as expected (not inflated or deflated).
- Make sure that Staff-type mapping for the contact import file is correct.
- Make sure that the contact import data is complete. Try reviewing the import file and comparing it to the source to ensure that it is capturing all of the required fields.

Summary

There are many sources and areas of data to investigate when you are trying to reconcile lost time. The following list is a brief itemized summary of what to review. When troubleshooting, be sure to do the following investigation in the following order:

1. Compare the scheduled agent hours in your workforce management software to the agent hours in the staffing file.
2. Confirm that all of your data sources use the same hours-per-week calculation for an FTE (typically 40

hours).

3. Once you have confirmed that your agent hours match, you need to reconcile the shrinkage values between your workforce management software and the off-phone data file. Keep in mind that you might need to take a granular approach and try to reconcile data at the activity-code level between the workforce management software and the Decisions shrinkage buckets. If you find that an agent activity code is not mapped to one of the shrinkage buckets, do that mapping and then re-import your shrinkage files.
4. If both your staffing data and your shrinkage data are accurate, then the next place to look is your inbound phone data. Ensure that the call metrics and the agent available times that are coming through are correct.
5. If all three sources are independently correct, then Genesys recommends that you review how your agents are assigned to their respective staff types in each of the data sources. If at all possible, make the Agent staff assignment methodology consistent. For example, John Smith is considered to be a Service Agent on ALL imports, rather than a Sales Agent in Staffing and a Service Agent on the phone.
6. You might also want to consider whether or not there is any shrinkage or off-phone time that your workforce management system is not able to capture. There will inevitably be some amount of time that cannot be captured in these data feeds. As long as you can understand what this lost time represents in your business, then having lost time isn't necessarily a bad thing and can be built into your forward-looking scenarios.

Managing Data Feeds

When you are ready to begin running your data feeds on an ongoing basis, you will have some additional options that you can use:

- All of 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 (that is, where the data files are saved), you can right-click the Data Adaptor and select **Configure Extractor(s)**, which will then take you back to the data source screen.
- Specific date ranges can be selected to import data from past weeks instead of new data and vice versa.
    - To import data between a specific date range, select **Between** and then select the date range that you wish to query.
    - To import all data after a specific date, select **Between** and then select a start date, but leave end date blank.
    - To import all data before a specific date, select *Between* and then select an end date, but leave the start date blank.

Create Simulations

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

Build simulations

Simulation models are automatically built using Contact Group and Media Type for non-multiskilling groups and Contact Type for multiskilling. The simulation uses 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.

To build a simulation, click the **Configure** button in the administration module, or click **Settings** > **Configure**. In the **Configure/Review Settings** window, click **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 of simulations.

Selecting parameters to build the models and why

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, Genesys recommends that you run the initial simulation model on all three goals and review results. If results are not desirable, then you can run the model again 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 eight weeks. If less than eight weeks have been imported into the database, it will only use the number or weeks available. If more than eight weeks are available, it can be helpful to use the additional weeks when building the initial models.

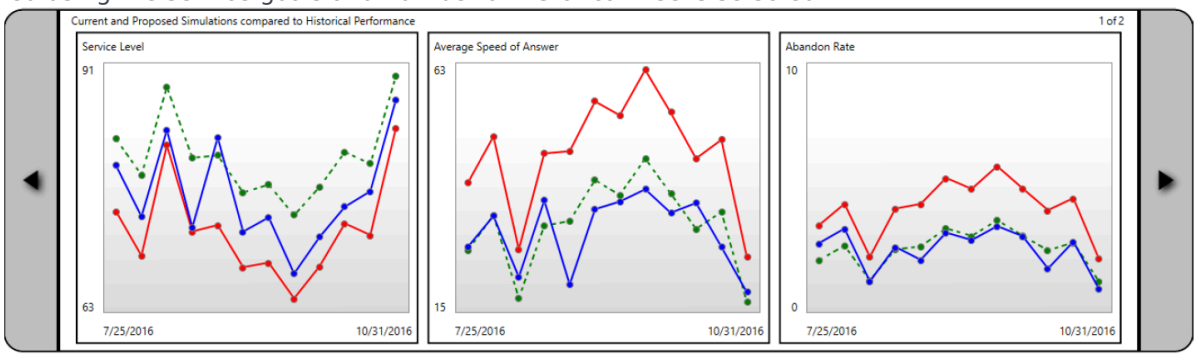
To change the default setting for the service goals and number of historical weeks used to build the simulation models, simply deselect any service goals that should not be included and either type over the number of weeks or select a new value from the drop-down list.

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  next to the contact type name.
   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.

2. Review the results of each model, the blue line on the chart represents the actual historical data, the red line is the current simulation that 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.



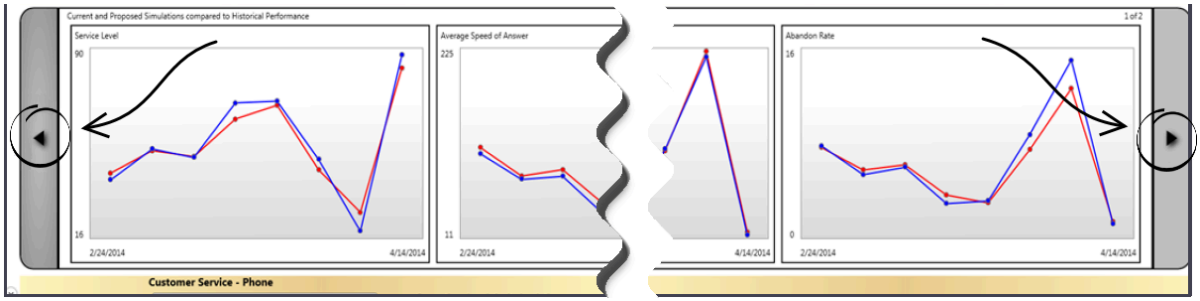
3. If the proposed (green line) simulation results are satisfactory, then click the *Click here to select a simulation to apply ...* drop-down list and choose **Proposed Simulation**. If the proposed simulation seems to be too far from the historical (blue line), it is important to review the data sets 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.

4. To exclude certain week(s) from the data sets being evaluated, Decisions has a Blocked Dates option at the top of the **Build/Review Simulations** window, which you can use 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 drop-down list.

5. When you open the **Build/Review Simulations** window, 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** at the top of the **Build/Review Simulations** window to select or deselect groups to review.
   When the new simulation is applied, the results will change in your scenario files. In other words, the scenarios you use in the Planning module to determine staffing and forecasts will use the simulation results and will provide an output that is directly affected by the simulation chosen.

6. The charts that are displayed can be hidden or unhidden by selecting or deslecting the service goal(s) in the **Show Graphs** section.

7. Click the arrow at either end of the graph to display additional information about the simulation model.



Use the **Export** function to 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.

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.

Customize Metrics Decimal

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, and so on.

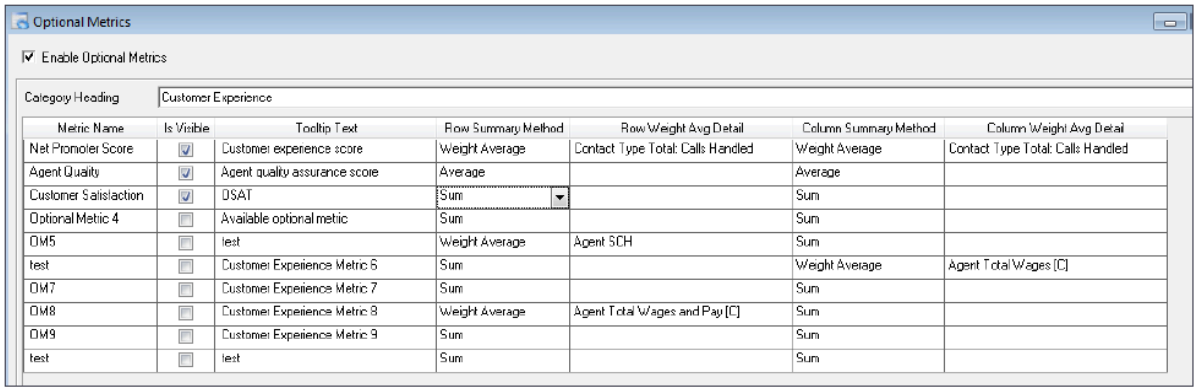
1. In the administration module, select **Settings** > **Customize Metrics Decimal**.
2. Expand the metric group to expose the metric for which you want to change the number of decimal places displayed.
3. Double-click the corresponding cell in the **No. of Decimal Places** column. Input a value according to the number of decimal places to be displayed. Note that “1” is tenths, “2” is hundredths, “3” is thousandths, and so on. To display no decimal places, enter zero.
4. To find a specific metric, use the **Search** field to type a whole or partial metric name, which will then display the results.
5. To apply the setting changes, click the **Update** button and close.

Optional Metrics

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. Note that 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.

To specify optional metrics:

1. In the admin application, navigate to Optional Metrics under Settings.
2. You must select Enable Optional Metrics before this area can be configured. Once selected, you 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, and so on.
   - 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.
3. 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.



Decisions Data Mart

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. The roles are:

- DataMart Admins
  - Data Mart administrators can enable and disable Data Mart security, add and 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.

Configure Data Mart

Log in to the Decisions administration application, click the **Data Mart** button to open the **Manage Data Mart** window or click **Settings** > **Data Mart**, and perform the following tasks in order:

- Enable and Disable Security
- Add and Delete Data Mart Users
- Manage Data Mart Folder Permissions

Enable and Disable Security

Only a Data Mart administrator can enable and disable security for the Decisions Data Mart. Security is disabled by default.

In the Decisions administration application, click the **Data Mart** button to open the **Manage Data Mart** window. Alternatively, use the **Settings** > **Data Mart** menu to open the **Manage Data Mart**

window. Security is enabled when add a check mark to the **Enable Data Mart Security** box. To disable security, clear the check box.

When Data Mart security is disabled:

- Every user who has the DataMartUsers role in the Data Mart database can access (view, publish, and delete) data in the Decisions Data Mart.
- Only the Public folders are available.
- **Data Mart Explorer** is not available in the administration application.

When Data Mart security is enabled:

- For each user who requires access to data in Decisions Data Mart, an administrator must add the user to the 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 using the **Manage Data Mart** window.
- Public folders are available.
- Each user has a folder within the **home** folder that is private to the specific user.
- User folders within the **home** folder can be shared with other Data Mart users.

Add and Delete Data Mart Users

For a user to be able to publish a scenario to the Decisions Data Mart, that user must have his or her account added to the Data Mart. This account is the Windows login that he or she uses when accessing the Decisions application. It is not the username that this user enters on the login screen for the Decisions application. In addition, a user who needs to report on data, but who will not publish, must have his or her account added to the Data Mart, as well. This could be the user's Windows login or MS SQL Server login; it depends on how the use will access data in the Data Mart.

To add a new Data Mart user:

1. In the Decisions administration application, click the **Data Mart** button to open the **Manage Data Mart** window. Alternatively, use the **Settings** > **Data Mart** menu.
2. On the **Manage Data Mart** window, enter the username of the new user in the text field, and click **Add**.
   The username that you enter must be either a Windows login or an MS SQL Server login.

Delete a Data Mart User

To delete a Data Mart user:

1. In the **Manage Data Mart** window, click the X beside the user’s name.
   All empty folders will be deleted.
2. If data was published to the folder, then 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.

Manage Data Mart Folders

In the Decisions administration application, click the **Data Mart** button to open the **Manage Data Mart** window. Alternatively, use the **Settings** > **Data Mart** menu. On the **Manage Data Mart** window, click the **Manage Folder Permissions** button. The **Data Mart Explorer** window opens. You manage folders and permissions in the **Data Mart Explorer**.

Data Mart Explorer displays the hierarchical structure of folders on your Data Mart. Users can access **Data Mart Explorer** in the Decisions Planning application, as well.

Folder Hierarchy

The folder hierarchy that displays in the **Data Mart Explorer** window has the following characteristics:

- **root** folder:
  - Contains the **home**, **Public**, and **Synchronization** folders.
- **home** folder (displays only when Data Mart security is enabled):
  - Contains a separate folder for each user.
  - Scenarios can be published to the user folders.
- **Public** folder:
  - Every user who has the DataMartUsers role in the Data Mart database can access the **Public** folder.
  - Scenarios can be published to these folders.
- **Synchronization** folder:
  - Contains the historical data and configuration information that has been synchronized from the Decisions database.

Sharing Folders

To share a user's folder that exists within the **home** folder in the Decisions Data Mart, open the **Data Mart Explorer** window. Right-click the user folder to be shared and select **Share Folder** from the shortcut menu. In the **Share Folder** dialog box, type the name of the user with whom the folder will be shared. Alternatively, click the drop-down arrow in the text field to find the user. The drop-down list includes all Data Mart users.

Specify the permission levels for the user with whom you are sharing the folder. Click the drop-down arrow to open the shortcut menu, which contains the following permission level options:

- `Report`: Allows a user to select data from available data sources.
- `Publish/Report`: In addition to what is available when a user is assigned the `Report` permission, the `Publish/Report` permission also allows a user to publish data to a data source, create/delete/rename,

or cut/copy a data source.

- `Manage/Publish/Report`: In addition to what is available when a user is assigned the `Publish/Report` permission, the `Manage/Publish/Report` permission also allows a user to create/delete/rename or cut/copy a folder.
- `Remove`: Removes the user's previously-assigned permission level.

Data Mart FAQs

- What happens if a user leaves the company?
  - If security is turned off, then there is nothing that you need to do. If security is turned on, then you can delete the user using the **Manage Data Mart** window in the Decisions administration application.
    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 reports or modify content from the employee that is no longer with the company.

    For more information, see Add and Delete Data Mart Users.
- What happens when a user is on vacation and another user needs to access the data in their private home folder?
  - As an administrator, you can grant permissions on any folder. Use the **Data Mart Explorer** window to find the appropriate folder, and then add the required permissions using the **Share Folder** shortcut menu.
    For more information, see Sharing Folders.
- What happens if you disable security?
  - When security is disabled, the **home** folders are no longer accessible to anyone. The **Public** folder is still available. Genesys' best practice is to have the Data Mart users check to see if there is any data that they would want to retain in their **home** folder. They can move or copy the data into the **Public** folder so that it will still be available after security is turned off.
    For more information, see Enable and Disable Security.