Genesys Administrator Extension Help

Formats

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Formats

A Format is a user-customized template for Calling Lists. It is created in Genesys Administrator Extension and consists of Fields that form a data structure (for example, a database table); each Field has properties that describe its characteristics. A Calling List must contain Genesys mandatory fields and can also contain user-defined custom Fields. See additional information in the Outbound Contact Deployment Guide.

Mandatory Fields are necessary in order to process records properly. They identify each customer and the status of each customer record. Genesys mandatory fields are described in the Mandatory Fields tab, below. See additional information in the Outbound Contact Deployment Guide.

Custom/user-defined Fields, typically containing business-related data, can be created and added to a Format in Genesys Administrator Extension. Custom fields define customer information that is available to the agent during a call. See Fields in the Outbound Contact Deployment Guide about how to send customer data to an agent.

After custom/user-defined fields are added, the Format is finished and is ready to be used to create Calling Lists. A Calling List must be created from a Format, and inherits mandatory and custom fields from the assigned format. Each Calling List can have only one corresponding Format.

When database records are imported into a Calling List, data fills the mandatory and custom fields, conforming to properties established in the finished Format.

Viewing Formats

The **Formats** list shows the formats that are in your environment. It is sorted in a hierarchy by Tenants, configuration units, sites, and folders. To view objects by a particular hierarchy, select the hierarchy type in the drop-down menu above the list.

> **Important**
> Formats that are disabled appear grayed out in the list.

Configuration Manager respects tenancy permission settings. You can access only those objects that you have been granted permissions and privileges to access.

You can filter the contents of this list in two ways:

- Type the name or partial name of an object in the **Quick Filter** field.
- Click the magnifying glass button to open the **Tenant Directory** filter panel. In this panel, click the Tenant that you want to select. Use the **Quick Filter** field in this panel to filter the Tenant list.

You can sort the items in the list by clicking a column head. Clicking a column head a second time reverses the sort order. You can add or remove columns by clicking **Select Columns**.

To select or de-select multiple objects at once, click **Select**.

Working with Formats

To create a new Format object, click **New**. To view or edit details of an existing object, click the name of the object, or click the check-box beside an object and click **Edit**. To delete one or more objects, click the check-box beside the object(s) in the list and click **Delete**. You can also delete individual objects by clicking on the object and then clicking **Delete**. Otherwise, click the **More** button to perform the following tasks:

- **Clone**—Copy a Format.
- **Move To**—Move a Format to another hierarchical structure.
- Enable or disable Formats.
- Create a folder, configuration unit, or site. See Object Hierarchy for more information.

Click the name of a Format to view additional information about the object. You can also set options and permissions, and view dependencies.

Procedure: Creating Format Objects

Steps

1. Click **New**.
2. Enter the following information. For some fields, you can either enter the name of a value or click **Browse** to select a value from a list:
   - **Name**—The name of the Format.
   - **Description**—A brief description of the Format.
   - **Tenant**—In a multi-tenant environment, the Tenant to which this object belongs. This value is automatically set to the Tenant that was specified in the **Tenant Directory** field in the object list.
   - **State Enabled**—If selected, indicates that the object is in regular operating condition and can be used without any restrictions.
3. For each Field to be added to this Format:
   a. Click the **Fields** tab and click **Add**.
   b. Navigate to the appropriate folder, if necessary, and do one of the following:

- To add an existing Field to this Format, select it from the list of Campaigns.
- To add a new Field to this Format, click **+** to create the Field in this folder and then select it from the list.

4. After you have finished creating the Format, do one of the following:
   - Click **Save** to accept the changes and return to the list of Format.
   - Click **Apply** to accept the changes and return to the **General** tab of this Format.
   - Click **Cancel** to discard the changes.

Mandatory Fields

The following mandatory fields are required in all Calling List Formats. This list is sorted alphabetically by field name. Default values for these fields are defined in the Fields objects during configuration.

Field Name	Data Type	Description
agent_id	varchar(32)	Login identifier of the agent who handled the record.
app_id	integer	Empty, not used at this time.
attempt	integer	Number of attempts made to reach the customer.
call_result	integer	Final outcome of the record processing. See the Call Results table in the Outbound Contact Reference Manual.
call_time	integer	Latest date and time at which the record was processed (dialed), in UTC format.
campaign_id	integer	Configuration DBID of the Outbound Dialing Campaign, as a part of which the record has been processed.
chain_id	integer	Unique identification number of the chain to which the record belongs.
chain_n	integer	Unique identification number of the record within the chain.
contact_info	varchar(128)	Customer’s contact information; phone number in the voice campaign.

Field Name	Data Type	Description
contact_info_type	integer	Type of the contact information; phone type in the voice campaign. See the Contact Information Types table in the Outbound Contact Reference Manual.
daily_from	integer	Earliest time of the day at which a customer can be contacted (seconds since midnight).
daily_till	integer	Latest time of the day at which a customer can be contacted (seconds since midnight).
dial_sched_time	integer	Date and time for which the processing of the record has been scheduled or rescheduled, in UTC format (seconds since midnight 01/01/1970).
email_subject	varchar(255)	Empty, not used at this time.
email_template_id	integer	Empty, not used at this time.
group_id	integer	Empty, not used at this time.
media_ref	integer	Empty, not used at this time.
record_id	integer	Unique identification number of a calling record.
record_status	integer	Current status of the record. See the Record Types table in the Outbound Contact Reference Manual.
record_type	integer	Type of the record. See the Record Types table in the Outbound Contact Reference Manual.
switch_id	integer	DBID of the Switch where the agent who handled the record had logged in.
treatments	varchar(255)	Treatments application history. For more information, see Treatments in the Outbound Contact Deployment Guide.
tz_dbid	integer	Configuration DBID of the Time Zone object associated with the calling record.