

Genesys Operations Manual

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Section: Information Technology Services – Call Centre

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Genesys administrator function checklist

Add skill? CME USER GUIDE

Change skill? CME USER GUIDE

Change password? CME USER GUIDE

Give someone access to CME? THIS OPERATIONS MANUAL

Give someone access to CC Pulse designer?? CME USER GUIDE

Give someone access to save workspaces? THIS OPERATIONS MANUAL

Create a non agent login? THIS OPERATIONS MANUAL

Open / Close the queue? THIS OPERATION MANUAL

Set area specific options such as queue messages or major status? THIS OPERATIONS MANUAL

Set emergency mode? THIS OPERATIONS MANUAL

Change a voice guide? OTHER DOCUMENTATION

Make changes to quickcall? In progress

1 CONTROLLING CALLS TO AGENTS

1.1 Agent Skills

The Genesys Routing solution has been designed to only route calls to agents with the correct skills for their call centre.

Administrators may assign all required skills to an agent. See the CME User Guide.

1.2 Call Centre Manual Opening and Closure

Call centre administration staff have the capability to manually open and close each call centre. This is actioned in Genesys Configuration Manager. See *4. Call Centre Routing Features Options* for call centre routing options.

1.3 Call Centre Emergency Modes

Each call centre can be placed into an Emergency mode by dialling a number and entering a PIN. While a call centre is in Emergency mode, callers will be played a message explaining that the centre is closed. The call will then be released. To end the emergency mode, dial the number again and enter the pin again. See *6. Emergency Mode* for emergency mode instructions.

2 CREATING AGENTS AND SETTING ACCESS

2.1 Creating a New Agent

This process will create an agent who will be able to log into QUT Softphone and take calls, and be able to log into CCPulse without any rights to make changes.

To create an agent in Genesys, first an ACD agent must be created. To create an ACD agent fill out the form located at <http://www.its.qut.edu.au/telephones/landlines/reqform.jsp>. Ensure that 'programming' is selected next to Work Required and in the Further Details of Work Required' field enter 'create ACD agent' and include the new agents full name and user name.

The person also requires access to a directory on the tils-fs server which is appropriate for their call centre. The person must be granted access to this directory. A drive (O: drive) must then be mapped to this directory. See [Appendix A](#) for instructions.

Once the ACD agent has been created, contact the Staff IT Helpdesk on 38644000 or helpdesk@qut.edu.au with the following information and indicate that a Genesys login needs to be created.

ACD agent ID: <this will be provided to you when the ACD agent is created>

First name of agent:

Last name of agent:

Username of agent:

Call centre agent will log into:

Access level required: User / Supervisor (Supervisor access allows person to make changes in Configuration Manager)

2.2 Creating a non agent login to CCPulse and Configuration Manager

This process will create a new administrative user who will not be able to log in to the softphone to take calls but will be able to log in to Configuration Manager and CCPulse to carry out supervisory functions.

Contact the Staff IT Helpdesk on 3864 4000 or helpdesk@qut.edu.au with the following information and indicate that a Genesys non agent login needs to be created.

First name:

Last name:

Username:

Call centre person will log into:

Access level required: User / Supervisor (Supervisor access allows person to make changes in Configuration Manager)

2.3 Modifying a CCPulse+ login.

Contact the Staff IT Helpdesk on 3864 4000 or helpdesk@qut.edu.au and indicate the information that you require to be changed about a login.

2.4 Deleting a CCPulse+ login

Contact the Staff IT Helpdesk on 3864 4000 or helpdesk@qut.edu.au and indicate the login that you would like to be deleted.

2.5 Granting a person supervisor access to Configuration Manager

To request supervisor access to configuration manager, contact the Staff IT Helpdesk on 3864 4000 or helpdesk@qut.edu.au with the following information and indicate that the user requires supervisor rights to Configuration Manager.

Username:

Call centre person requires supervisor rights to:

2.6 Granting a person access to save workspace changes in CCPulse+

By default agents will be able to alter workspaces in CCPulse+ but will not be able to save the changes.

To request access to save workspace changes in CCPulse+, contact the Staff IT Helpdesk on 3864 4000 or helpdesk@qut.edu.au with the following information and indicate that the user requires write access to:

"\\tils-fs\ITS\Call Centre\Genesys\<>name of call centre>"

Example:

Grant write access to: \\tils-fs\ITS\Call Centre\Genesys\QUTInfo

Username: bloggs

Call centre: QUT Information

3 CALL CENTRE ROUTING FEATURES OPTIONS

3.1 Available Routing Options

Options on routing strategies can be modified by a supervisor using the Configuration Manager (CME). The table below lists the available manual changes to the Call Centre routing strategies.

Please note that mode is available to all call centres and is used to manually open and close the queue.

CALL CENTRE	ROUTING FEATURES
Facilities	Mode
QUT Information	Major, mode
QUT Theatre	Mode
Staff Help Desk	Major, mode
Student Centre	Mode, posinqueue, prequeue
Student Computing	Greeting, mode

3.2 Call Routing Option Descriptions

Note: Setting any of the options below will ensure that the option remains in effect until the option is manually reset by the same person or someone else with supervisor access.

Option: greeting

Description: Possible values: 0, 1.

A value of 1 enables the greeting voice guide to be played.

A value of 0 will ensure that it is not played.

Option: major

Description: Possible values: 0, 1.

A value of 1 enables the major outage voice guide. When this message is enabled the auto-attendant is by-passed.

A value of 0 will disable the major outage voice guide and reinstate the auto-attendant.

Option: mode

Description: Possible values: 0, 1, 2.
A value of 0 manually closes the call centre (and it will stay closed until manually set to 1 or 2).
A value of 1 manually opens the call centre (and it will stay open until manually set to 0 or 2).
A value of 2 indicates that the call centre is in normal mode and time-of-day routing will be followed.

Option: posinqueue

Description: Possible values: 0, 1.
A value of 1 enables the position in queue voice guide.
A value of 0 disables it.

Option: prequeue

Description: Possible values 0, 1.
A value of 1 enables the pre queue voice message.
A value of 0 disables it.

3.3 Setting Routing Options

These options are set through Configuration Manager. To set the options for your centre, first ensure that you have the annex tab enabled.

To enable the annex tab:

1. Open Configuration Manager
2. Click the View menu
3. Click Options
4. Tick the box next to Show Annex tab in object properties

To set a value for the options:

1. Open Configuration Manager
2. Click on Resources on the left
3. Double click on Switches on the right
4. Double click on the switch entry that corresponds to your call centre. See table below.
5. Double click DNs on the right
6. Double click on the name of your call centre
7. Double click on the Alias that corresponds to your call centre. See table below. Note you may need to expand the Alias column.

8. Click on the Annex tab
9. Double click on _ROUTER_
10. Double click on the option you wish to change.
11. Enter the desired value into the Option Value field. Appendix B contains option definitions and possible values.
12. Click OK
13. Click OK again.

CALL CENTRE	SWITCH	ALIAS
Facilities	A4400_KG	RP_Facilities
QUT Information	A4400_GP	RP_QUTInformation
QUT Theatre	A4400_GP	RP_QUTTheatre
Staff Help Desk	A4400_GP	RP_StaffHelpdesk
Student Centre	A4400_GP	RP_StudentCentre
Student Computing	A4400_GP	RP_StudentComputing

4 PUBLIC HOLIDAYS/ SPECIAL DAYS

Configured Public Holidays are common across all call centres. A call centre can elect to use or not use any existing public holiday. A Public Holiday may be a specific date (eg: 17/07/2005) or a day of year (eg: December 25).

To add, delete, or modify a public holiday for your call centre contact the Staff IT Helpdesk on 3864 4000 or helpdesk@qut.edu.au with the details of the changes.

Note: Student Computing Helpdesk has two public holiday tables. Type 1 will treat calls as per the weekend opening hours, Type 2 will close call centre and play an After Hours message.

5 EMERGENCY MODE

5.1 Activating emergency mode

The emergency mode can be activated from any digital handset located on the same site as your call centre. Please see the table below for your site. If the call centre is not actually located on the site, use the IP phone in your area to set the emergency mode.

Note that a pin is required to set the emergency mode.

To activate the emergency mode:

1. Call the emergency mode activation number designated for your call centre. See the table below for this number.
2. You should hear a message as to the current state of the emergency mode.
3. Enter the PIN followed by #.
4. The system will confirm the mode has been changed by playing a message advising the new emergency mode state.
5. You may then hang up.

Call Centre	Site	Number to call
Facilities	KG	7287
Staff Help Desk	GP	7198
Student Centre	GP	7517
Student Computing	GP	7509
Theatre	GP	7506
QUT Info	GP	7516

If an incorrect PIN is entered, the call will be released without any message played.

5.2 Deactivating emergency mode

To deactivate the emergency mode, follow the same procedure for activating the emergency mode.

Note that a pin is required to deactivate the emergency mode.

5.3 Resetting emergency mode PIN

To reset the emergency mode PIN:

1. Open Configuration Manager
2. Click on Resources on the left
3. Double click on the switch entry that corresponds to your call centre. See table below.
4. Double click DNs on the right
5. Double click on the name of your call centre
6. Double click on the Alias that corresponds to your call centre. Note you may need to expand the Alias column.
7. Double click the entry for your call centre that has an alias ending with '_EM', example 'RP_QUTInformation_EM'
8. Click on the Annex tab
9. Double click on the option called '__ROUTER__'
10. Double click the option called 'pin'
11. Change the PIN value
12. Click OK
13. Click OK again

6 UPDATING VOICE GUIDES

To update voice guides on the genesys call distribution you will need to use an Alcatel Advanced IP Phone

- To listen to the current voice guide:
 1. Dial #04
 2. Enter "voice guide number" when prompted

- To update a voiceguide message:
 1. Dial #83
 2. Click on the softkey below "Record"
 3. Enter the voice guide number : xxxx
 4. Click on the softkey below "Apply" –
The D-term display will show - "Recording of VG Message nbr: xxx"

 5. Click on the softkey below "Start" – to start recording the service status message
 6. Click on the softkey below "Stop" – to stop recording the service status message
 7. Click on the softkey below "Listen" – this will give a preview of the updated message
 8. Click on the softkey below "Apply" – this will then provide the option to accept the new message
 9. Click on the softkey below "List" – this will show the voice guide number
 10. Click on the softkey below "Apply" –
Then the D-term will show "Confirm the replacement of xxx – YES / NO
 11. Click on the softkey below 'yes'
 - a. The D-term will display - "Enter the memo:"
 12. Click on the softkey below "Apply" –
 - a. The D-term will display -
"Patience – File creation in progress."

(Please note: when the message is being replaced a message will appear indicating "patience". This may take a little while and the handset should not be replaced until it has been completed)

- 13. Hang up the phone : after the D-term displays
"xxx" validated for msg nbr : xxx

7 COMMON ISSUES AND RESOLUTIONS

7.1 Agent is not receiving calls

If an agent is not receiving calls, the following should be checked:

- Verify that the Agent can be seen in CCPulse+. If not, check that they have logged on correctly.
- Verify that the Agent state is the same on the softphone, handset and CCPulse+.
- Verify that the Agent is showing as ready on the handset and in CCPulse+.
- Verify the Agent has the correct skills to receive the calls.

If the agent is still not receiving calls the user and/or the Customer should log a call with the Staff IT Helpdesk.

7.1.1 Agent is in a 'Stuck' state

If the agent state as shown by CCPulse+ is Dialling or Outbound while their handset and softphone shows Ready or Withdrawn, the problem will generally be resolved within ten minutes automatically. If not please contact the Staff IT Helpdesk.

7.2 Softphone issues

7.2.1 Unable to Login

If the softphone will not load check that:

- The username and password are correct. If the password is not correct this can be reset via configuration manager
- The connection details are correct. These are available by clicking the *Details >>* button.
- The agent's PC has a network connection

If the softphone still does not work contact the Staff IT Helpdesk.

If the softphone loads but shows an error, check that:

- The ACD password that the agent entered is correct. You can do this by manually logging into the handset.
- The agent is not already logged in to another handset.
- The agent's handset is not off the hook or on a call.

If the agent is still unable to login, please log a call with the Staff IT Helpdesk.

7.2.2 QuickCall Integration

If the QuickCall integration fails, a warning will be displayed on the softphone.



You can click the icon for a description of the issue. You should check:

- The correct 'O:' drive is mapped on the agent's PC. See appendix A for the correct 'O:' drive mappings.

The softphone will continue to operate without the QuickCall integration. Screen-pop of the QuickCall will be disabled until the softphone is restarted.

If the agent is still unable to use the QuickCall feature, please contact the Staff IT Helpdesk.

8 REPORTING FAULTS

The following information should be collected when reporting call or Agent-related faults:

- A clear and concise description of the fault.
- Login ID and extension of the AGENT where the fault occurred.
- The call centre the AGENT is a member of, and the campus they are located at.
- The exact time from the AGENT's phone.
- The number the caller was calling from.
- The actions that the AGENT was carrying out when the fault occurred.

Faults are logged via the Staff IT Helpdesk on 3864 4000 or helpdesk@qut.edu.au.

9 APPENDICES

9.1 Appendix A – ‘O:’ drive mappings

Please see the below table for the correct ‘O:’ drive mappings.

CALL CENTRE	MAPPING
Facilities	\\tils-fs\ITS\Call Centre\Genesys\Facilities
QUT Information	\\tils-fs\ITS\Call Centre\Genesys\QUTInfo
QUT Theatre	\\tils-fs\ITS\Call Centre\Genesys\QUTTheatre
Staff Help Desk	\\tils-fs\ITS\Call Centre\Genesys\Helpdesk
Student Centre	\\tils-fs\ITS\Call Centre\Genesys\StudentCentre
Student Computing	\\tils-fs\ITS\Call Centre\Genesys\StudentComputing

9.1.1 Map an ‘O:’ Drive

To map the correct ‘O:’ drive for your area:

1. Click the **start** button
2. Click **My Computer**
3. Click on the **Tools** menu and select **Map Network Drive**
4. Select **O:** in the drop down menu next to ‘Drive’
5. Enter the correct mapping for your area (see above table) next to ‘Folder’
6. Tick the box next to ‘Reconnect at login’
7. Click **Finish**