Genesys Predictive Routing Help

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This Help explains how ADMIN and REVIEWER users can access the Genesys Predictive Routing (GPR) web application for the following tasks:

- (ADMIN users) Configure your account password policies and manage users.
- Reset your password.
- View Feature Coverage and Model Accuracy reports for your predictors.

Related documentation:
-

Overview

Genesys Predictive Routing (GPR) draws on accumulated agent, customer, and interaction data to score each agent for how well that agent can handle a specific interaction. GPR can do the following:

- Determine the best possible match between waiting interactions and available agents and then route the interactions so as to optimize your selected KPIs.
- Take account of whether scores should be higher than a certain threshold in order to be routed. You can have interactions wait for a better-matching agent or reduce the minimum required score over time.
- Set higher priority interactions to be routed first, even if they score lower than other waiting interactions.
- Report on the predicted versus actual outcomes. GPR uses the actual outcome to further train the machine-learning model, improving the accuracy of predicted outcomes between similar customer profiles and agent profiles.

GPR operates as a managed service, so most deployment and configuration is handled by Genesys. If you have questions about how your account is set up, contact your Genesys representative.

For basic navigation tips, see the following topics:

- How do I navigate the GPR user interface?
- How do I navigate the Help?

What do you want to do?

- (ADMIN) Configure password policies for your account.
- (ADMIN) Add users and manage role assignments.
- Reset your password.

- Monitor predictor feature coverage.

- View model accuracy graphs.

> **Important**
>
> - The Predictive Routing interface as shown in this Help might include features or settings that do not apply to your contact center or your user role.

Looking for something else?

You might also find the following information of use:

Genesys Predictive Routing Deployment and Operations Guide enables you to plan, set up, and maintain the Data Loader and URS Strategy Subroutines components deployed in your hybrid Genesys Predictive Routing (GPR) environment.

You can find GPR Release Notes in the following places:

- Predictive Routing RN for Genesys Multicloud CX

- Release Notes for all GPR on-premises components

Navigating the Predictive Routing interface
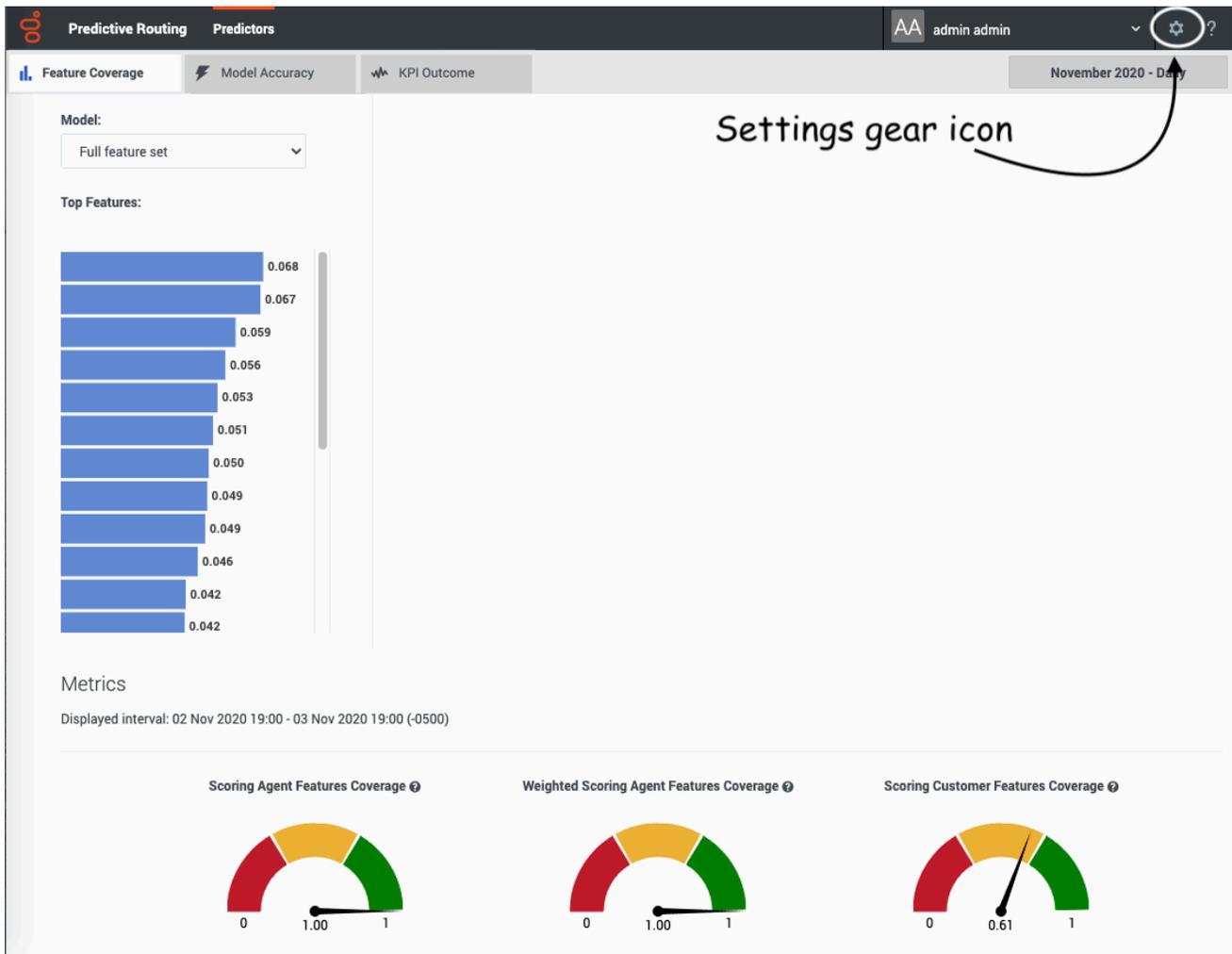
The Predictive Routing user interface opens to the Feature Coverage tab.

- Click the Model Accuracy tab to a chart showing how well your models are predicting the outcomes of agent-interaction matchups, compared with actual data.

- To view password, account, and user settings, click the gear icon ⚙ on the right side of the top navigation bar.

For security reasons, the GPR web application logs out inactive users. This functionality works in the following way:

- If you do not perform any action in the GPR browser window for 14 minutes, an inactivity alert opens and displays a 60-second countdown timer.

- If you then perform any action, such as scrolling, moving or clicking your mouse, or entering keystrokes from your keyboard, the inactivity timer disappears and your session continues.

- If you do nothing, your session ends after the 60-second timer expires and you GPR automatically logs you out.

The Settings menu

Contents

- Administrator
-

The topics in this section explain how to use the **Settings** parameters available to you depending on your user role.

Related documentation:
-

Open the Settings menu

To open the **Settings** menu, click the gear icon , located on the right side of the top menu bar.

When you start using Genesys Predictive Routing (GPR), Genesys configures an account for you and supplies you with the username and initial password. This account is active when you first log into Predictive Routing. This section of the Help explains the following:

- ADMIN users - How to update the password policies for your account, manage users and roles, and reset passwords.

- REVIEWER users - How to reset your password.

Configure your password policies

Contents

This page explains how ADMIN users can set or update password policies for their account.

Related documentation:
  •

Set password policies

The **Settings > Account** window enables you to continue the following fields:

Field name	Default Value	Valid Values
Password expires after [x] days	90	1–90 days
Password cannot be changed until after [x] hours	24	1–72 hours
Show password expiration reminder [x] days before password expiry	7	1–14 days
Password cannot be the same as the [x] previous passwords	5	5–15 previous passwords
Account is locked after [x] invalid login attempts	6	3–6 invalid login attempts
Unlock user account after [x] minutes	60	30–300 minutes
Block inactive user after [x] days	45	1–90 days
Message to show blocked users:	This user account was blocked due to too many failed login attempts. Please try again later.	Leave the default, edit the message to be displayed to blocked users, or leave the text box empty to omit a notification message.

Create and update users and roles

Contents

- Administrator

This window is available only to users with the ADMIN role.

The User Management window enables you to add new ADMIN and REVIEWER users to your account and to configure user settings.

Related documentation:
-

Create a new user

To add a new user to an account:

1. Click the **Settings** gear icon, located on the right side of the top menu bar: , to open the configuration menu.
2. Click the **Account** > **User Management** tab on the left-hand navigation bar.

3. Click **New User**.

Enter the user name and email, and select the appropriate role or roles.

1. By default, the **Roles** text box contains both the ADMIN and REVIEWER roles when you create a user.

   - To remove a role, click the **X** next to the name of that role.

   - If you decide to add a role back after removing it, click in the Roles text box to open the list of roles.

   - If you already assigned a role to the user, click *below* the already-assigned role. Clicking to the right of an assigned role does not open the list of roles.

2. Click **Create** to finish setting up the user.

GPR then sends a password reset email to the new user.

Update a user
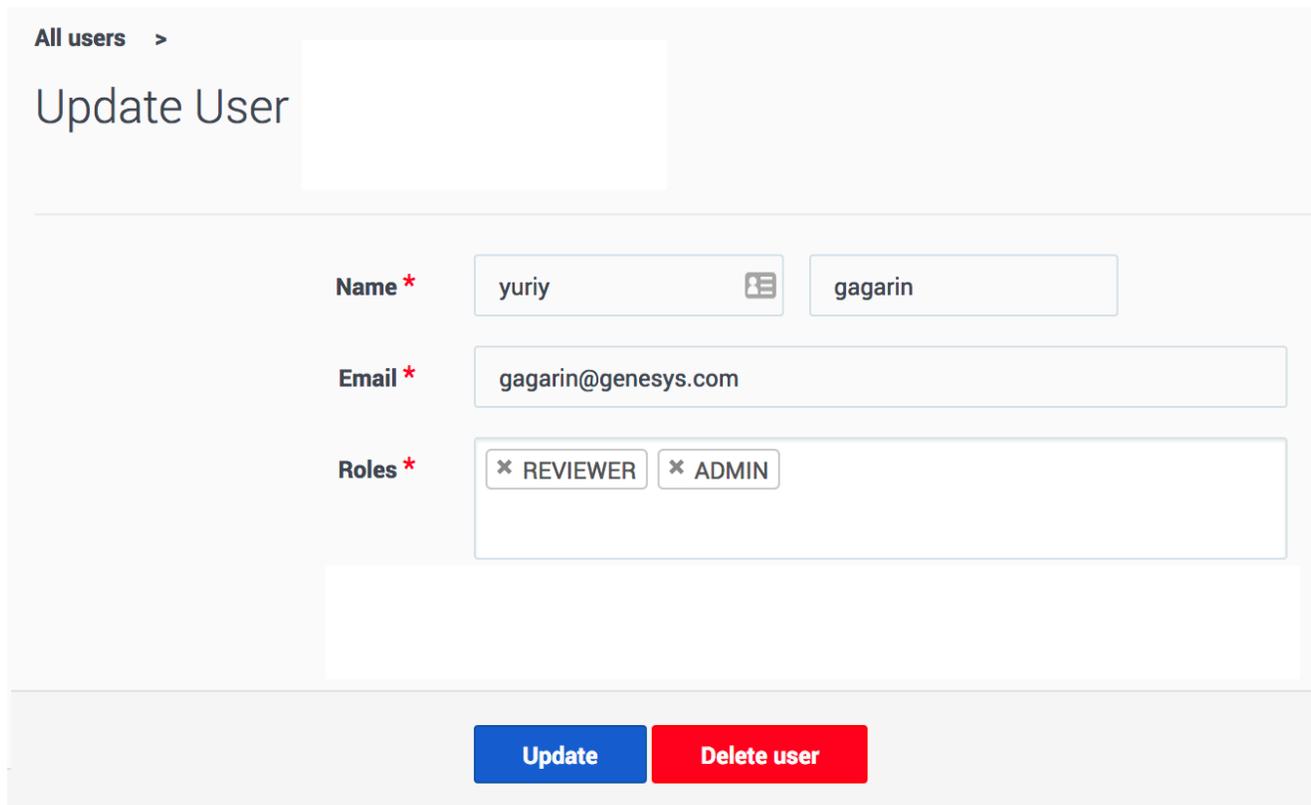
To update user information:

1. Click the **Account** > **User Management** tab on the left-hand navigation bar. A table containing data for all configured users appears.

2. Click a user's email address.

3. Make the desired changes to the user name, email, or roles.

4. Click **Update** to save your changes.

If you need to remove the user, click **Delete user**.

Roles

GPR supports the following roles:

- ADMIN - View the Feature Coverage and Model Accuracy charts. Manage users, account password policies, and update passwords.

- REVIEWER - View the View the Feature Coverage and Model Accuracy graphs. Change their own password.
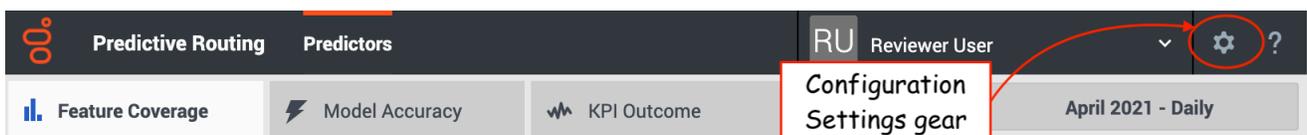
Reset your password

Contents

The Password tab enables you to change the password for your existing user account. An ADMIN user can also reset other users' passwords.

Note: The Predictive Routing Staff Help provides internal users with additional documentation.

Related documentation:

-

Reset a password

To reset your password, click the **Settings** gear icon, located on the right side of the top menu bar, to open the **Password** tab.

1. Click the **Password** tab on the left-hand navigation bar.

2. Enter your current password.

3. Enter the new password.

4. Re-enter the new password to make sure you entered it correctly.

5. Click **Update** to accept it.

What you can monitor

Genesys Predictive Routing (GPR) provides feature coverage and model accuracy graphs for your predictors.

Related documentation:
  •
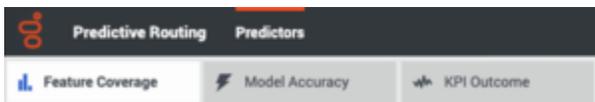
The top navigation bar enables access to the feature coverage and model accuracy graphs.

Note: The Genesys Reporting solution provides in-depth feature-rich reporting on scoring, interaction handling, outcomes, and so on. See Integrate with Genesys Reporting for more information.

Monitor predictor feature coverage

Contents
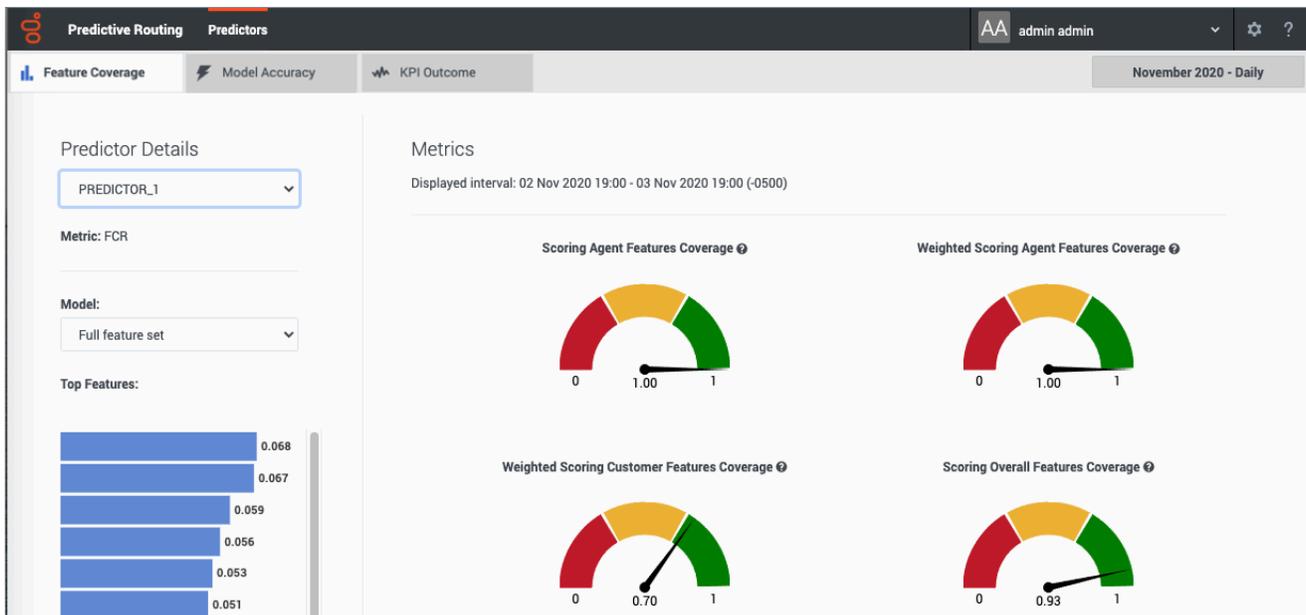
Gain insight into your Machine Learning model performance factors to ensure you always get the best predictions.

Related documentation:

  •

The Feature Coverage tab

The **Feature Coverage** tab provides a view into whether you have adequate data to make good predictions.

The **Feature Coverage** tab enables you to select the following information:

  • The name and ID of the predictor. Use the selector to specify which predictor to view.

  • The name and ID of the model. Use the selector to specify which model to view.

  • The displayed date range. Use the year and month selectors, on the right side of the window, to specify the month to view.

  • The granularity—Day, Hour, or 15 minutes—at which the data is displayed on the dials and on the Trends window that opens when you click one of the dials.

Note: This page does not display real-time updates. GPR refreshes the data displayed once per day, at 3:00 am UTC.

How to read the dials
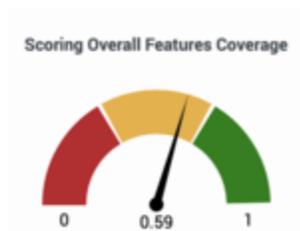
 The **Feature Coverage** tab presents six dials, each with a range of 0-1, which indicates the percent coverage of the specified performance factor. The number below the dial corresponds with the point indicated by the needle on the dial. That is, a dial setting of 0.59, as shown in the graphic, equals 59%.

Note: If the window displays no agent feature dials, there are no agent features present in the selected model.

The dials are colored red, yellow, and green to provide a quick visual indicator of whether the feature coverage for the associated parameter is satisfactory. *Green* indicates that you have good coverage, *yellow* means that you should review your coverage quality, and *red* indicates that coverage is not adequate and you should take action to improve predictor performance.

Metrics definitions

Feature coverage scores

Three of the dials show the percentage of features available when the selected model was trained that are also in the actual data used for scoring. One shows agent features, one customer features, and one shows the result for all features taken together.

The values range from 0 to 1, with higher being better. If all features in the training dataset used to create the model are also in the data used for scoring, the value is 1. A lower value shows that some data you expect might no longer be available.

If, over time, feature coverage drops but weighted feature coverage holds steady, the data in the missing features might be of low value in any case, since the weighted coverage value gives emphasis to the features with the highest impact on the KPI configured in the predictor.

Weighted feature coverage scores

The remaining three dials also show the percentage of features available when the selected model was trained that are also in the actual data used for scoring, but with that figure adjusted to weigh the most significant features higher.

- To view the feature weighting, see the bar graph showing the top features on the left side of this window.

As a result of the weighting, if coverage is good for very significant features but poor for insignificant ones, the weighted result is still good. However, even if feature coverage is good for most features, if

it is poor for one or more significant features, the weighted result is poor. As a result, coverage can appear good on the non-weighted dials and poor on the weighted ones.

In these dials also, the values range from 0 to 1, with higher being better.

If weighted feature coverage drops but feature coverage is steady, the small amount of missing data must disproportionately affect key features.

View feature coverage trends
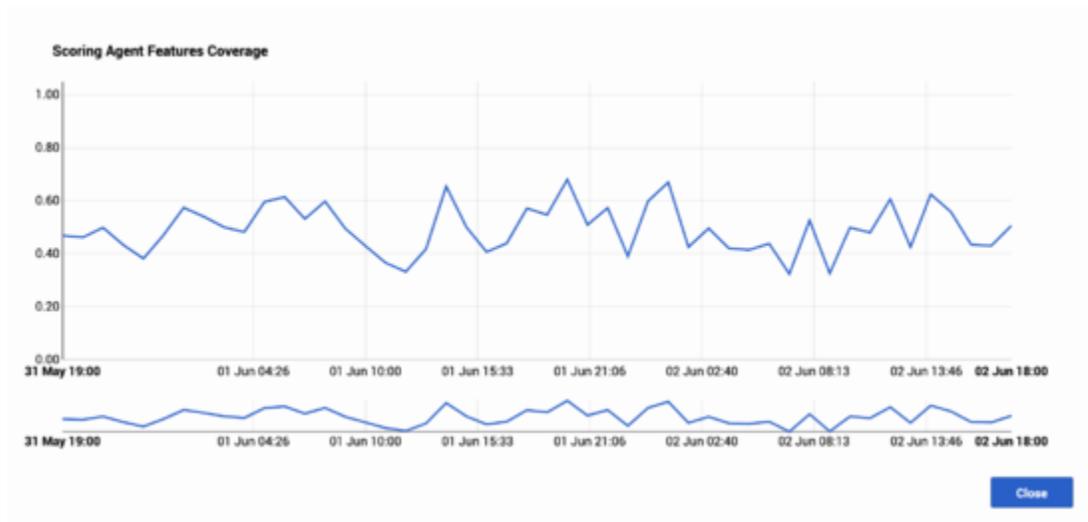
The feature coverage dials show data for the selected month period. To view feature coverage trends over the selected time, follow these steps:

1. Click any of the six dials. A **Trends** window opens, with a graph showing all data points for the metric you clicked during the month you selected on the main window. The data points reflect the granularity selected in the **Plot By** field.

2. To show a shorter period of time within the month, click the blue selector line below the main chart. This activates a slider function, enabling you to narrow the time period shown on the upper Trend graph. This

3. Hover your mouse over the Trend line to open a tooltip showing the exact date and feature coverage value for that point on the line.

View model accuracy

Contents

View how well your model is performs over time, how accurate your model was when trained, and feature coverage.

Related documentation:

•

The Model Accuracy tab

The **Model Accuracy** tab provides a view into how well your model performs over time.

The **Model Accuracy** tab enables you to select the following information:

- The name and ID of the predictor. Use the selector to specify which predictor to view.

- The name and ID of the model. Use the selector to specify which model to view.

- The displayed date range. Use the year and month selectors to specify the month to view.

- The **Plot By** selector enables you to set the granularity with which the graph displays data. You can choose to view data by Day, Hour, or 15-Minute interval.

Note: This page does not display real-time updates. GPR refreshes the data displayed once per day, at 3:00 am UTC.

How to read the graph
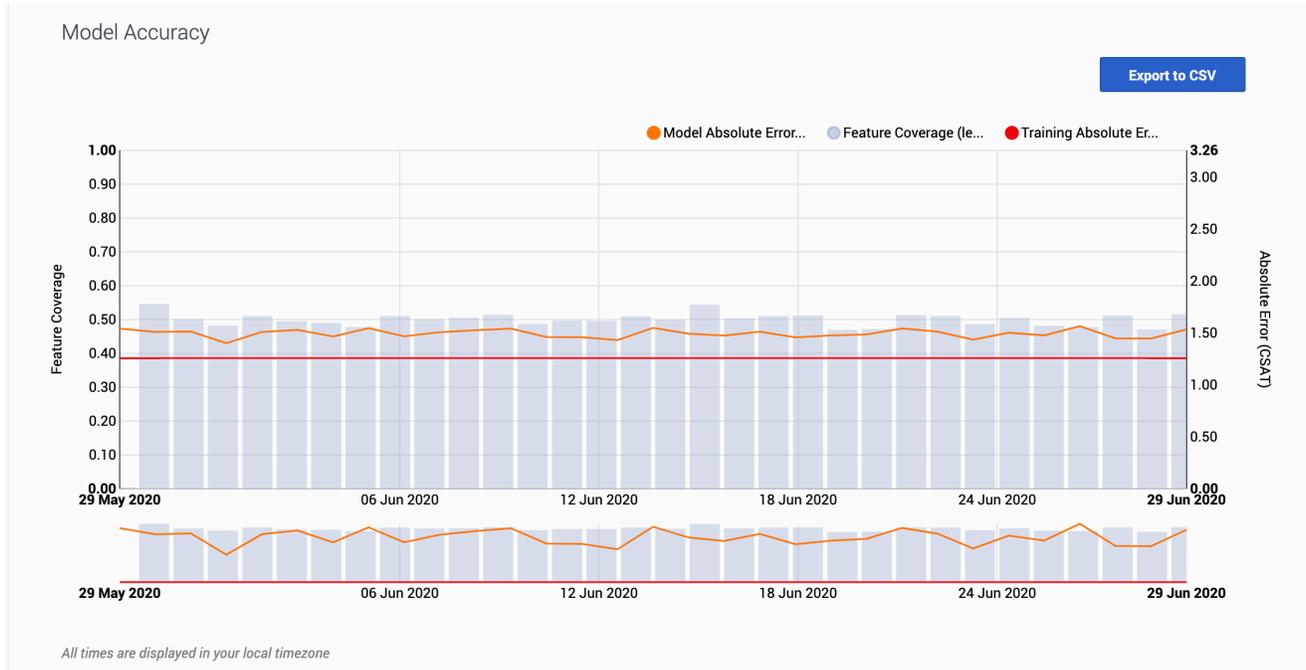
The Model Accuracy graph shows the mean absolute error value, indicating the difference over time between the results the model predicts and the actual outcomes. This value, and how to interpret it, varies depending on the type of key performance indicator (KPI) your model optimizes.

The graph also includes a horizontal line marking the accuracy level when the model was trained, enabling you to compare the training result with real-world performance. The gray bars show the feature coverage level, since feature coverage issues are often the reason for degradations in model accuracy.

Note: If feature coverage does seem to be the source of a model's drift away from accuracy, use the **Feature Coverage** tab to troubleshoot issues. To view the features ranked by strongest impact on the KPI value, see the **Top Features** horizontal bar graph on the Feature Coverage tab.

Example

When you view the graph, keep in mind that the vertical axis on the right shows the mean absolute error rate, not the actual KPI value. The example image on this page shows the graph for a model designed to optimize CSAT. The horizontal red training line shows that when you created the model, it had an error rate of 1.26. That is, the average difference between the predicted CSAT and the actual CSAT was 1.26 points. As you have used this model over time, this difference between the predicted CSAT and the actual CSAT has ranged from 1.40 to 1.56.

To export the model accuracy data as a .csv file, click the **Export to CSV** button.
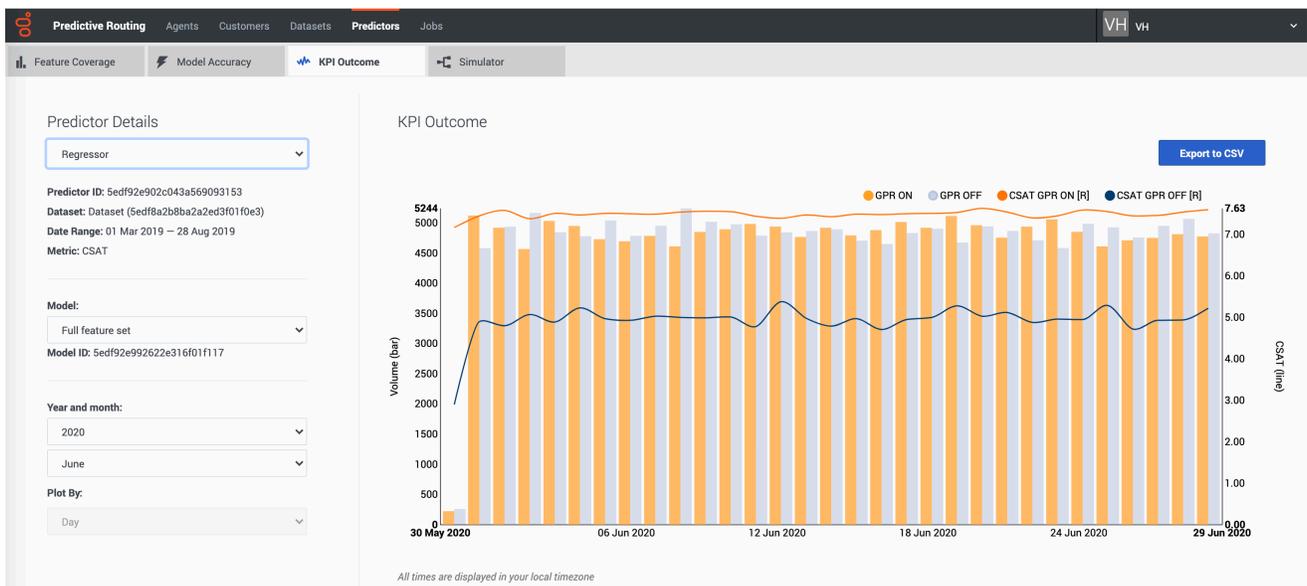
View KPI outcome

Contents

View how well Genesys Predictive Routing (GPR) optimizes your key performance indicators (KPIs) compared with routing without GPR.

Related documentation:
  *

The KPI Outcome tab

The **KPI Outcome** tab provides a view into how effectively Predictive Routing (GPR) routing optimizes your KPI compared with non-GPR routing.

This tab is on the **Predictors** window:

Prerequisites: To use this tab, you must have the following:

  * Your account must include an Agent Profile dataset, an interaction dataset with the Interaction ID field set, one or more predictors, and have scoring data available.

  * You must configure Data Loader to extract the necessary data from the Genesys Info Mart database to derive outcome results for the metric in your predictor and append this data to the interaction dataset used to create the selected predictor.

Configure the view

The **KPI Outcome** tab enables you to select the following information:

- The name and ID of the predictor. Use the selector to specify which predictor to view.

- The name and ID of the model. Use the selector to specify which model to view.

- The displayed date range. Use the year and month selectors to specify the month to view.

The **Plot By** granularity is set to Day. This value is not configurable.

Notes on the data displayed

- GPR filters the data used to generate this graph to remove calls identified as anomalies. For example, GPR might discard the following:

  - Calls with an AHT of less than 15 seconds or greater than 2400 seconds.

  - Calls with null values for the AHT, EMPLOYEE_ID, or VIRTUAL_QUEUE fields.

    The actual criteria used for filtering depend on your environment. For details, contact your Genesys representative.

- This page does not display real-time updates. GPR refreshes the data displayed once per day, at 3:00 am UTC.

Read and configure the graph
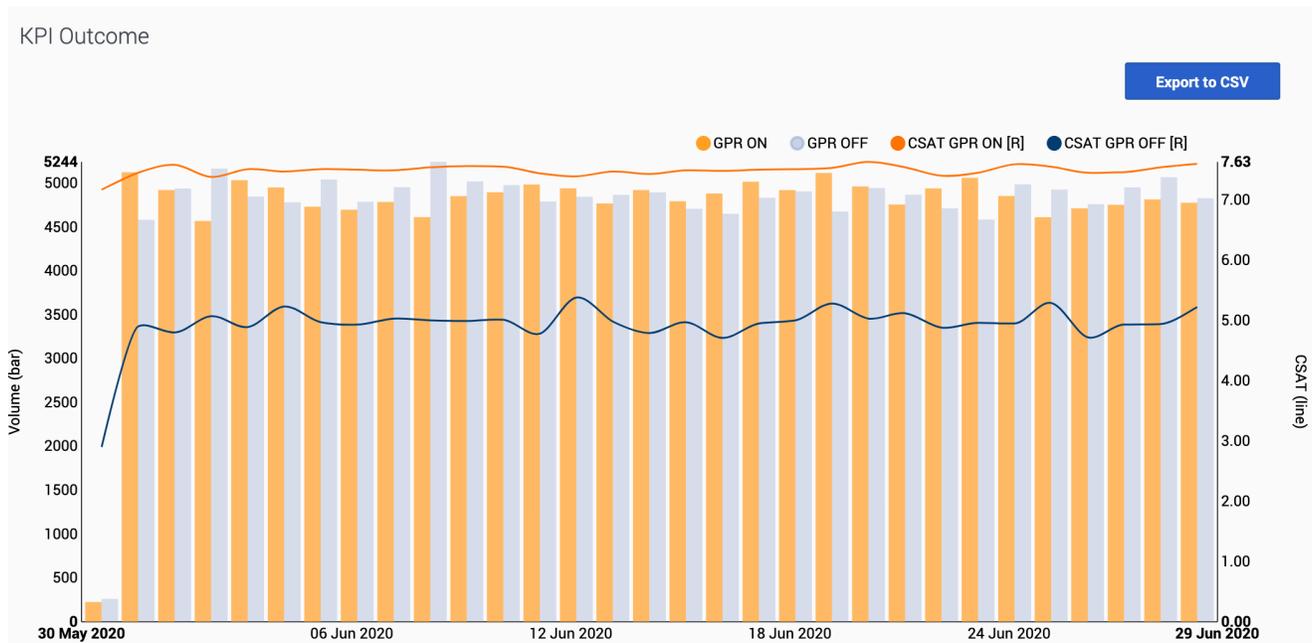
The KPI outcome graph has two vertical axes, volume of interactions on the left

side and the KPI values on the right. The horizontal axis shows the dates displayed. The graph uses two sets of bars and lines, one for interactions routed using GPR (orange), one for non-GPR interactions (unavailable).

- Bars: Show the volume of interactions routed with and without GPR on each day.

- Lines: Show the metric level for GPR and Non-GPR interactions on each day.

To view only GPR or non-GPR interactions, click the radio buttons above the graph to switch what data the graph displays.

Users with Admin permissions can export KPI Outcome data as a .csv file. To export, click the **Export to CSV** button.

- The export functionality is not available to users with Reviewer permissions.