



Workforce Engagement Management for Genesys Engage Solution Guide

5/5/2021

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- Administrator

Find information about how to enable Genesys Engage customers to use the Workforce Engagement Management (WEM) features that are available in the Genesys Cloud product.

Intended audience

This Solution Guide is intended for administrators, contact center managers, and network professionals who are using and administering the Genesys Engage cloud software and those who want to take advantage of the advanced Workforce Engagement Management features and functionality available through integration with the Genesys Cloud product.

Some knowledge of cloud infrastructure, architecture, and technologies is helpful, but not required.

Naming conventions in this guide

The *Genesys Cloud product* refers to the features and capabilities available with our Genesys Cloud contact center solution. The *Genesys Engage product* refers to the features and capabilities available with our Genesys Engage cloud and Genesys Engage on-premises offerings.

To provide clarity and readability in this guide, the name *Genesys Engage product* is sometimes shortened to Genesys Engage, and the name *Genesys Cloud product* is shortened to Genesys Cloud.

Through integration between Genesys Engage and Genesys Cloud, Genesys Engage customers can take advantage of the Workforce Engagement Management (WEM) feature suite that resides in Genesys Cloud. At this time, the integration is available only to Genesys Engage cloud customers.

Introduction

Workforce Engagement Management for the Genesys Engage solution is an integration between Genesys Engage and Genesys Cloud software. This integration enables Genesys Engage customers to use the Workforce Engagement Management feature suite available in the Genesys Cloud solution, by choosing one of three product offerings or tiers. For more information, see the Genesys Cloud Pricing page (scroll down to the "Workforce" section).

These product offerings expand the integration of Genesys Engage with Genesys Cloud software, enabling Genesys Engage users to take advantage of an increasing array of new and existing features.

To learn more about enabling integration between Genesys Cloud and Genesys Engage software, see About Workforce Engagement Management in the Genesys Cloud Resource Center, or contact your Genesys Account Representative.

Supported operating systems and browsers

Genesys Engage services are accessed through web-based user interfaces that rely on customer-provided browsers running on devices such as PCs or tablets.

Find information about system requirements for each platform:

- For Genesys Engage cloud, see the Multicloud Resource Center.
- For Genesys Cloud, see the Genesys Cloud Resource Center.

Multi region support

Each Genesys Engage tenant connects to a single Genesys Cloud organization, which operates in single region. However, Genesys Engage cloud clients from multiple regions can connect to a Genesys Cloud organization in the same region.

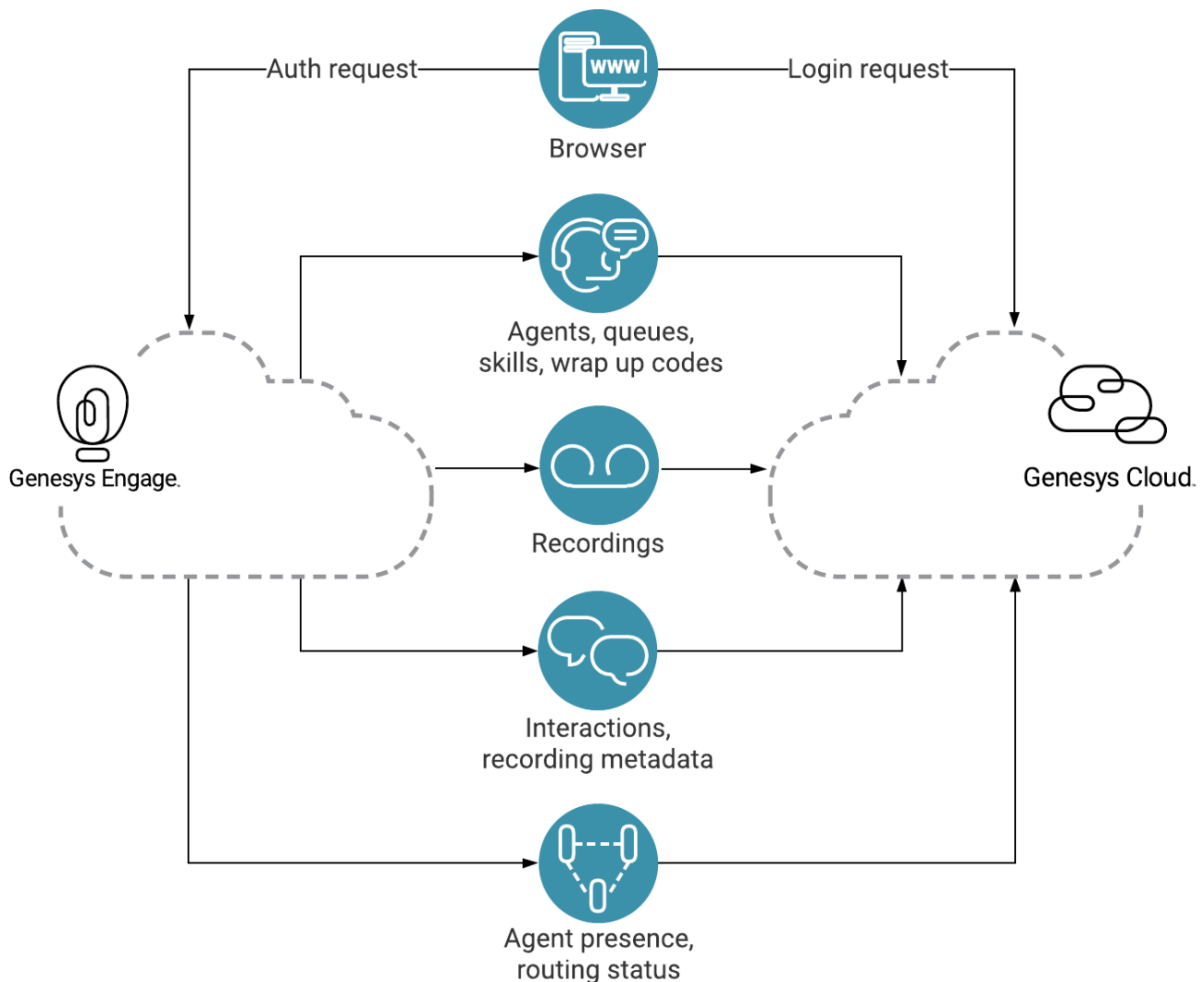
For example, if your Genesys Engage deployment is distributed across multiple regions, such as us-east1 and us-west1, it would be assigned one region and one organization in Genesys Cloud — let's say us-east-1, with the two Genesys Engage regions connecting to it.

See the Genesys Cloud Platform API in the Developer Center for a complete list of regions. For more information on this topic, contact your Genesys Account Representative.

Data synchronization and retention

Data synchronization

The primary focus of integration is to replicate call and interaction details from a voice-only Genesys Engage deployment to the Genesys Cloud platform for processing.



- **Authentication**—The Genesys Cloud platform uses Single Sign-On (SSO) authentication. Although Genesys Engage credentials are not synchronized to the Genesys Cloud platform, Genesys Engage customers use their Genesys Engage credentials to log in to it to access Workforce Engagement Management features.
See [Single Sign-On in the Genesys Engage Multicloud Resource Center](#) and [About single sign-on in the Genesys Cloud Resource Center](#).
- **Agents, skills, queues, wrap-up codes**—Genesys Engage configuration data is replicated in Genesys Cloud, such that agents, queues and queue-user assignment, and wrap-up codes in Genesys Cloud reflect the configuration data in Genesys Engage.
See [About agent interactions and Assign queues to an agent in the Genesys Cloud Resource Center](#).
- **Recordings**—Voice recordings are replicated from Genesys Engage to Genesys Cloud and can be searched and played back in Genesys Cloud. Conversations generated in Genesys Engage contain agent IDs, queue IDs, wrap-up codes, and the start and end time of the various segments.
See [About call recording in the Genesys Cloud Resource Center](#).

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- **Interaction replication**—Voice-only interactions (recordings and call events) are replicated from Genesys Engage to Genesys Cloud. Replicated interactions within the Genesys Cloud organization are then available for access and for metrics from the Performance views in Genesys Cloud.

See About performance tools in the Genesys Cloud Resource Center.

- **Agent presence**—Syncing agent presence events is a one-way sync from Genesys Engage to Genesys Cloud. Genesys Engage is the primary source of this data. There are two aspects to this enhancement, but in both cases the status is stored in Genesys Cloud:

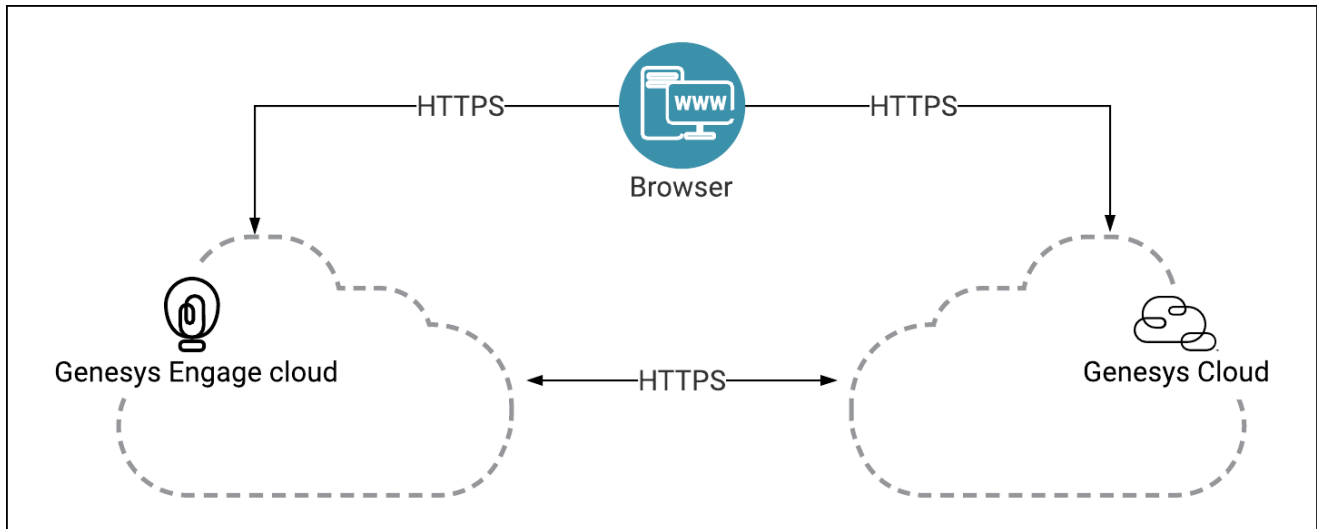
- Presence—Agents are either online or offline. The status is derived from the agent's desktop login state.
- Routing status—Agents are either engaged in interactions or idle.

See Agent presence, status, and activity indicators, routing status, and on queue and off queue in the Genesys Cloud Resource Center.

Retention policies

Genesys Cloud maintains retention policies for data storage. For more information on this topic, see About Data Storage for Genesys Cloud in the Genesys Cloud Resource Center.

Cross-platform security



Network traffic between Genesys Engage and Genesys Cloud is performed using encrypted Transport Layer Security (TLS) protocols, such as HTTPS.

Recording and call events data is encrypted at rest and in transit. Recordings that might contain personal information are encrypted at source (in Genesys Engage), using strong private/public key pairs generated in Genesys Cloud.

Workforce Engagement capabilities and features

The Genesys Cloud Workforce Engagement Management offering for Genesys Engage users provides a comprehensive workforce optimization solution that simplifies the agent experience and helps organizations drive results and employee satisfaction with capabilities, such as call recording and playback, quality management, and workforce management.

To learn more, visit the Resource Center.

Call Recording

Genesys Engage enables you to record voice calls and use policies to decide which calls to record. Genesys Engage then sends the recorded files to Genesys Cloud, enabling you to decide how long to retain them. As a user, choose to record your calls and listen to them whenever you need to.

See About call recording.

Quality Management

Use quality management to play back recordings and evaluate agents and interactions to improve the contact center experience. Managers can also set up coaching appointments with agents to mentor and help improve agent performance.

See About quality management.

Workforce Management

Use workforce management to configure and manage business units, management units, service goal templates, planning groups, activity codes, and more. Create and work with schedules, manage real time and historical adherence, view and manage intraday monitoring, and manage agent schedules and time off requests.

See About workforce management.

More about WEM features

To find out how to access the features, see Accessing WEM features.

To find out how Genesys applies business context to the Workforce Engagement Management features and capabilities, see Related Use Cases.

An evolving feature suite

Genesys is continuously updating and making available new Workforce Engagement Management capabilities in Genesys Cloud. These new services leverage the power and AI capabilities of Genesys Cloud.

Currently, a limited number of Workforce Engagement Management features (described above) are available to Genesys Engage users. However, the following capabilities (not yet supported) are being considered for future release:

- Interaction recording of digital channels

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- Screen recording
 - WFM for digital channels
 - Speech and text analytics
 - Employee development
 - Performance management
 - Rewards and recognition

For information about the future releases of Workforce Engagement Management for Engage and its capabilities, contact your Genesys Account Representative.

Preparing for Integration

To prepare for integration with Genesys Cloud, Genesys Engage administrators must complete the following tasks:

- **Enable roles for the Admin user**—Designate an administrator user who will enable the roles required for the Admin user to perform administrative tasks in Genesys Cloud. See [Enabling roles for the Admin user](#).
- **Configure OAuth client**—Ensure the designated administrator user configures the OAuth client to generate a client ID and secret for your organization. See [Configuring the OAuth client for the Admin user](#).
- **Choose an identity provider (IdP)**—Determine which IdP you'll use for SSO integration. See [Configuring single sign-on](#).
- **Identify routing objects**—Identify the virtual queues (VQ) that will appear in Genesys Cloud and will be used for forecasting and scheduling. Genesys maps these queues to agent groups (AG) and virtual agent groups (VAG) that you create.
- **Create agent groups and virtual agent groups**—Identify the VQs and AGs or VAGs that will be used for queue/user mapping in Genesys Cloud. These VAG objects are associated with the identified VQ objects to provide queue/user data for Workforce Management.
- **Group organizational units for migration**—See [Migrating configuration objects](#).

After the VQ, AG, and VAG object are identified, created, and mapped they are dynamically synchronized with Genesys Cloud using Genesys APIs. This might take some time, depending on the amount of data being synchronized.

Migrating configuration objects

You must consider how your business units, countries, and office locations will be grouped within your Genesys Cloud organization. In Genesys Cloud, administrators can separate and group organizational units (that become configuration objects) into separate Divisions. A Division is a way to group and segregate these objects but keep them in the same organization. Once Divisions are created and configured, administrators can use roles to grant user access to them, and the objects within them.

Important

Genesys Engage supports only the single default Home Division. Creating/adding multiple Divisions in Genesys Cloud is not supported when integrating with Genesys Engage. See also, [Frequently asked questions](#).

For more information about Divisions, see [Divisions overview](#) in the Genesys Cloud Resource Center.

Integration with Genesys Cloud

Genesys Cloud Conduit Engage microservice connects Genesys Engage resources and sends data to Genesys Cloud, enabling access to Workforce Engagement Management features and functionality.

Your Genesys Cloud organization

Genesys Engage integrates with Genesys Cloud via your Genesys Cloud organization, which is created for you. You receive a welcome email to activate your admin account in Genesys Cloud. The Genesys Cloud organization is provisioned with the following:

- The base functionality required for your Genesys Cloud integration.
- An admin console you can use to configure your Genesys Cloud integration.
- A user with the Genesys Cloud Admin role, which includes default admin permissions, and any integration-specific permissions.

Tip

Genesys creates your Genesys Cloud organization for you when you purchase any Workforce Engagement Management offering. As an existing Genesys Engage cloud customer, you already have a tenant ID in Genesys Engage. Once your organization is created in Genesys Cloud (which takes a few days), you'll receive an email that includes instructions on how to activate your organization and obtain the Organization ID.

After your Genesys Cloud organization is activated, take note of these items:

- Administrator email address
- Administrator password
- Organization ID
- Organization short name – generated from the organization long name, in compliance with DNS restrictions (a-z, 0-9, A-Z)
- Region

Tip

If you are unsure of the Organization ID and short name, log in to Genesys Cloud and navigate to **Admin > Account Settings > Organization Settings**. Both the organization long name and short name appear there.

Enabling roles for the Admin user

After Genesys activates your organization, it automatically creates one Person object—the Admin user. This user will automatically be assigned the Admin and Employee roles, but will need to have other roles assigned in order to complete all of the necessary administrative tasks.

Your organization's designated administrator will complete the following steps in their Genesys Cloud organization:

Link to video

1. In the Genesys Cloud UI, navigate to **Admin > People and Permissions > People**.
2. Click the **Admin user** and navigate to the **Roles** tab.
3. Find the **Platform Integration** role and slide the toggle to the right to assign it to the Admin user.
To quickly find a role, click the View: drop-down menu and select All, and then type the role name in Search.
4. Click **Divisions** and select **All future divisions**.
This action assigns all divisions to the role.
5. Click **Save**.

Important

Do not confuse adding Divisions to a Genesys Cloud Organization with assigning **All future divisions** to a role. In these procedures, you are assigning *access to divisions* to a specific role, not creating Divisions in Genesys Cloud.

Configuring the OAuth client for the Admin user

After you've enabled all roles for the Admin user, configure the OAuth client by following the steps in this procedure:

Link to video

1. In the Genesys Cloud UI, navigate to **Admin > Integrations > OAuth** page.
2. Click **Add Client** to open the **Client Details** tab, and complete the following steps:
 1. Enter the **Application Name**. For example, *Genesys Engage*.

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2. Add a description, if necessary.
 3. Under **Grant Types**, select **Client Credentials**.
When this option is chosen, the Roles tab displays.
 3. On the **Roles** tab, slide the toggle to the right to assign the **Platform Integration** role to the OAuth client.
 4. Click **Divisions** and select **All future divisions**.
This action assigns all divisions to the role.
 5. Click **Save**.

Genesys generates the client ID and secret for your organization, and this information displays in the Client Details tab.

Important

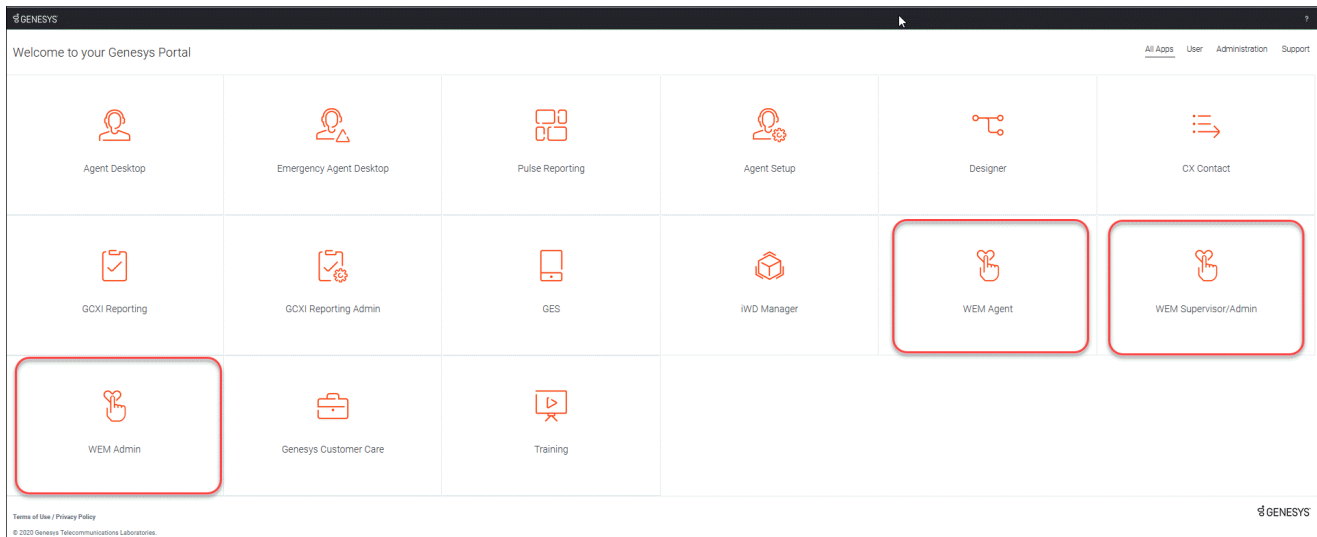
Although Genesys Cloud generates the OAuth client ID and secret, you are the only one who has access to it at this point. However, your Genesys Account Representative (AE) needs this information to complete the authentication in Genesys Engage. Work with your AE to determine how best to ensure the ID and secret are securely transferred.

Choosing an IdP for single sign-on

The way in which you configure SSO depends on the IdP you choose. You have two options, as follows:

- Use an external identity provider:
 1. Configure Genesys Engage. See Single sign-on in the Multicloud Resource Center.
 2. Configure Genesys Cloud. See About single sign-on (SSO) in the Genesys Cloud Resource Center.
- Use Genesys Engage as your identity provider:
 1. Configure Genesys Engage. See Genesys Engage as an identity provider or Genesys Cloud in the Shared Resource Center.

Accessing WEM features



After integration with Genesys Cloud is complete, Genesys Engage customers can browse to the Genesys Portal and on the **All Apps** tab, click the appropriate **WEM** icon— **Agent**, **Supervisor/Admin**, or **Admin**.



When prompted, use your Genesys Engage credentials to log in.

Alternatively, log in directly to Genesys Cloud at Cloud Log in. Simply change the region before clicking **Log In**.

Genesys Engage user experience

The following items describe the Genesys Engage user's experience after integration with Genesys Cloud is complete:

- **Genesys Cloud access:** Genesys Engage administrators, supervisors/managers, and agents can access Workforce Engagement Management features directly in Genesys Cloud.
See Accessing the WEM features in this article, and Administrators home and Get started (agents) in the Genesys Cloud Resource Center.

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- **Single sign-on:** Logged-in users are able to navigate across applications using their Genesys Engage log in credentials.
See Single Sign-On in the Multicloud Resource Center.
 - **Configure integration:** Administrators will need to complete a few tasks to prepare for integration.
See Preparing for integration in this article.

Leveraging existing features

In addition to the user's experience described above, there are many existing features in Genesys Cloud that Genesys Engage cloud customers can leverage after integration. Here are some example:

- Managing recordings
- Defining recording policies
- Uploading historical data
- Sending inbox notifications and alerts

See About Workforce Engagement Management (WEM) for a description of features and other related topics in the Genesys Cloud Resource Center.

User types and roles in Genesys Cloud

When a Genesys Engage cloud Person object is synchronized with Genesys Cloud for the first time, the Person is determined to be one of three Genesys Engage User types:

- A **supervisor** who has the **Is Agent** flag checked in Agent Setup and has **Supervisor** as one of its roles in the Agent Setup annex.
- An **agent** has who has the **Is Agent** flag checked in Agent Setup.
- A **non-agent** does not have the **Is Agent** flag checked in Agent Setup. This Person could be anyone, from an administrative user to a business analyst.

When a User is created in Genesys Cloud for the Person, Genesys Engage assigns all of the Genesys Cloud roles specified for that User type. If some of the specified Genesys Cloud roles do not exist, the Genesys Engage creates the User and assigns all of the existing roles for that User type.

Important

When creating Users, you must use valid email addresses for their usernames. For example, username@domain_name.com. Genesys Engage synchronizes usernames to Genesys Cloud (not employee IDs), but only usernames that also have domain names.

When initially creating the Genesys Cloud User, Genesys Engage does not change any of the assigned Genesys Cloud User roles, except in the following cases:

- If Genesys Engage detects a Person that transitioned from **Agent** to **Supervisor**, the Genesys Cloud roles are automatically added to the User. (No roles are removed.)
- If Genesys Engage detects a Person that transitioned from **Supervisor** to **Agent**, the **Supervisor** role must be manually removed. (No roles added.)

Tip

Although roles are added automatically, they are not removed automatically. Remember to remove roles manually.

Roles for WEM users

The following roles are available for Workforce Engagement Management users:

- Supervisor Roles: Employee, User, Cross Platform Supervisor
- Agent Roles: Employee, User
- Non-agent Roles: Employee

Each of the three WEM product offerings has roles that can be used immediately, as shown in the table below.

Tip

In this initial release of Workforce Engagement Management for Genesys Engage, only the Resource Management product offering is available for purchase. The other two product offerings are planned for future releases.

Roles for each WEM product offering:

	Master Admin	Planner Admin	Quality Administrator	Quality Evaluator	Cross-Platform Supervisor	User	Trusted External User
Employee Engagement	?	?	?	?	?	?	?
Quality Assurance and Compliance	?		?	?	?	?	?
Resource Management	?	?			?	?	?

Important

The **Master Admin** role has permission to add, delete, edit, and modify queues, skills, and wrap-up codes for User types. However, those who are assigned this role must not make changes to User types in Genesys Cloud.

See permissions for all roles in Products, roles, and permissions in the Genesys Cloud Resource Center.

User responsibilities

Once the configuration of Genesys Cloud Workforce Engagement Management is complete, the workflow for administrators, supervisors, and agents changes. The following sections provide an overview of the work that administrators, supervisors, and agents perform in Genesys Engage and Genesys Cloud.



Administrators

In Genesys Engage, administrators:

- Maintain the Genesys Cloud integration configuration.
- Create and manage Designer applications to select which calls are recorded. See [Getting Started with Designer in the Multicloud Resource Center](#).
- Assign agent permissions to control recordings. See [Roles and permissions overview in the Genesys Cloud Resource Center](#).

In Genesys Cloud, administrators:

- Maintain Genesys Cloud organization. See [Your Genesys Cloud organization](#).
- Assign user roles to grant access to functionality. See [Roles and permissions overview in the Genesys Cloud Resource Center](#).
- Assign users to divisions. See [Divisions overview in the Genesys Cloud Resource Center](#).
- View users, queues, skills, and languages. See [My Queues Activity view](#) and [User skills overview in the Genesys Cloud Resource Center](#).
- Configure single sign-on provider for Genesys Engage or a third-party identity provider, such as OKTA. See [Choosing an IdP for single sign-on in this article](#).



Supervisors

In Genesys Engage, supervisors:

- Manage workgroups, queue media, and agent membership.
- Manage skills and languages.
- Determine when to stop forecasting and scheduling agents in Genesys Engage, if using Workforce Management (WFM).
- Monitor and coach agents during calls with customers.

In Genesys Cloud, supervisors:

- Provide training to users and start using the Workforce Engagement Management features in Genesys Cloud for daily management of workforce. See *About workforce management in the Genesys Cloud Resource Center*. These features include:
 - Viewing replicated interactions and running analytics.
 - Setting up business units, management units, planning group, and activity codes.
 - Managing forecasts, schedules, time off requests, shift trades, intraday, real-time and historical adherence.
 - Accessing advanced workforce engagement management features.
 - Playing back recordings, evaluating agents and interactions, and setting up agent's coaching appointments to improve performance.



Agent

In Genesys Engage, agents:

- Accept interactions in Agent Desktop (Workspace Web Edition). See *Getting started in the Agent Desktop Agent's Guide* in the Multicloud Resource Center.
- Control recordings for individual calls (if they have been assigned permission to do so, by an Administrator.) See *Products, roles, and permissions list* in the Genesys Cloud Resource Center.
- Receive notification of Genesys Cloud work times such as shift trades, schedule changes, and evaluations.

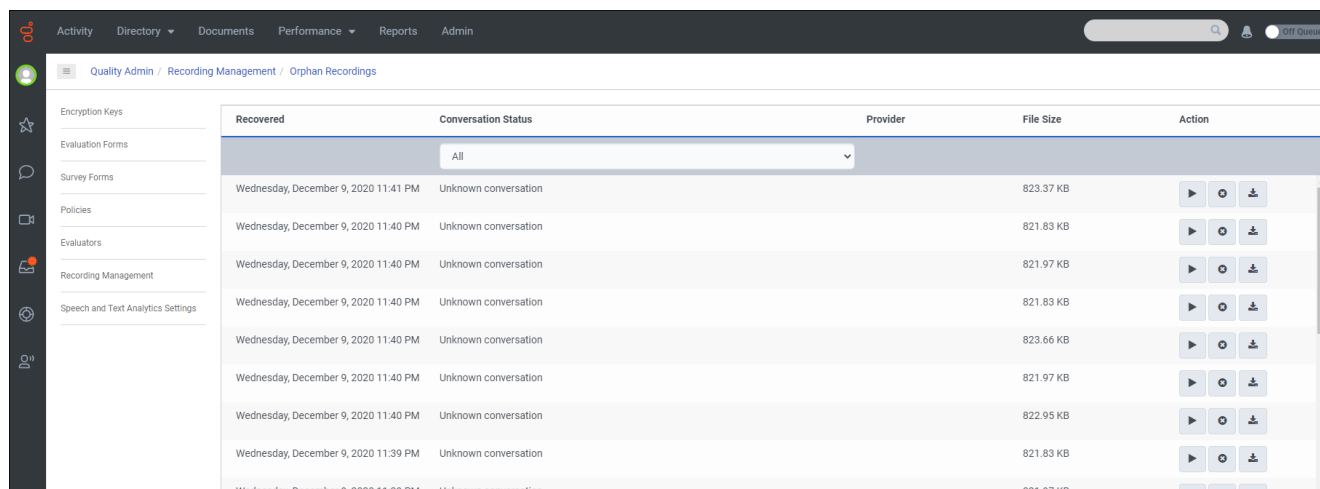
In Genesys Cloud, agents:

- View real-time adherence, view schedules, work with shift trades, and manage time off. See About workforce management for agents in the Genesys Cloud Resource Center.
- View inbox and My Performance views. See My performance views overview in the Genesys Cloud Resource Center.

Managing your integration

Handling incomplete interactions data

In the off chance that an outage occurs in Genesys Engage in the process of uploading interactions data to Genesys Cloud, call recordings are not lost but the recording data might not be available. In this case, the Quality Evaluator will not be able to evaluate the available recordings as they'll appear as *orphan-recovery* recordings.



The screenshot shows the Genesys Cloud Quality Admin interface. The breadcrumb navigation is 'Quality Admin > Recording Management > Orphan Recordings'. The left sidebar contains various navigation options like Encryption Keys, Evaluation Forms, Survey Forms, Policies, Evaluators, Recording Management, and Speech and Text Analytics Settings. The main content area displays a table of orphan recordings with the following columns: Recovered, Conversation Status, Provider, File Size, and Action. The 'Recovered' column is currently empty. The 'Conversation Status' column has a dropdown menu set to 'All'. The table lists several recordings from Wednesday, December 9, 2020, all with a status of 'Unknown conversation' and file sizes ranging from 821.83 KB to 823.37 KB. Each row has an 'Action' column with icons for play, refresh, and download.

Recovered	Conversation Status	Provider	File Size	Action
	All			
Wednesday, December 9, 2020 11:41 PM	Unknown conversation		823.37 KB	▶ ⌂ ⬇
Wednesday, December 9, 2020 11:40 PM	Unknown conversation		821.83 KB	▶ ⌂ ⬇
Wednesday, December 9, 2020 11:40 PM	Unknown conversation		821.97 KB	▶ ⌂ ⬇
Wednesday, December 9, 2020 11:40 PM	Unknown conversation		821.83 KB	▶ ⌂ ⬇
Wednesday, December 9, 2020 11:40 PM	Unknown conversation		823.66 KB	▶ ⌂ ⬇
Wednesday, December 9, 2020 11:40 PM	Unknown conversation		821.97 KB	▶ ⌂ ⬇
Wednesday, December 9, 2020 11:40 PM	Unknown conversation		822.95 KB	▶ ⌂ ⬇
Wednesday, December 9, 2020 11:39 PM	Unknown conversation		821.83 KB	▶ ⌂ ⬇
Wednesday, December 9, 2020 11:39 PM	Unknown conversation		821.97 KB	▶ ⌂ ⬇

Orphan recordings appear in the **Quality Admin > Recording Management > Orphan Recordings** tab in Genesys Cloud when some or all of a recording's interaction data is not uploaded within 24 hours. For more information, see View orphaned recordings in the Genesys Cloud Resource Center.

Genesys Engage handles orphan recordings by implementing the following steps for recovery and resolution:

- Recovery—Removes recordings from the Orphan list by generating mock external interaction segments that are *attach to* the recording.
- Search—Makes orphan recordings traceable to the originating interaction from Genesys Engage cloud using the following information:
 - DNIS—Is hardcoded to **orphan-recovery**
 - ANI—The Genesys Engage CallUUID (the universally unique identifier) of the call being recorded

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- Segment start time—The start time of the recording
 - Identification—Enables Quality Evaluators to distinguish the mock segments by labelling them **orphan-recovery**.

Tip

Orphan recordings and the associated mock interaction segments are intentionally excluded from the Workforce Management/Quality Management features, because WFM requires accurate interaction data. Therefore, error handling consists of exposing the recordings for listening.

Mapping UUIDs to Interaction IDs

Universal unique identifiers (UUID) are used in various ways in Genesys environments, such as for tracking items across different components, systems, and through time. You can use UUIDs to make correlations between similar items in Genesys Engage and Genesys Cloud. Genesys Engage uses CallUUIDs (the universal unique identifier for the call), whereas Genesys Cloud uses Conversation IDs (also called Interaction IDs). Therefore, to make these correlations, the UUIDs must first be converted to Interaction IDs.

A standard algorithm is used to generate the Interaction ID when Genesys Engage voice interactions are created in Genesys Cloud. To determine the Genesys Cloud Interaction ID, you'll need to:

- Find the Genesys Cloud Organization ID (see below)
- Obtain the CallUUID from the initial call segment
- Use any standard UUIDv3 generator to make the conversion (see the example below)

Finding the Organization ID in the Genesys Cloud UI

To find the Genesys Cloud Organization ID:

1. In the Genesys Cloud UI, select **Admin > Account Settings > Organization Settings**.
2. Click the **Organization Details** tab, and expand the **Advanced** dropdown menu to see the **Organization ID**.

Example of UUIDv3 generation

Input:

- Namespace (Genesys Cloud Organization ID): dbede0aa-25bb-4b5e-a6a1-27d88ba843f8
- Name (Genesys Engage originating CallUUID): 029LK70N8SBO9F2B04000VTAESXX000J

Output:

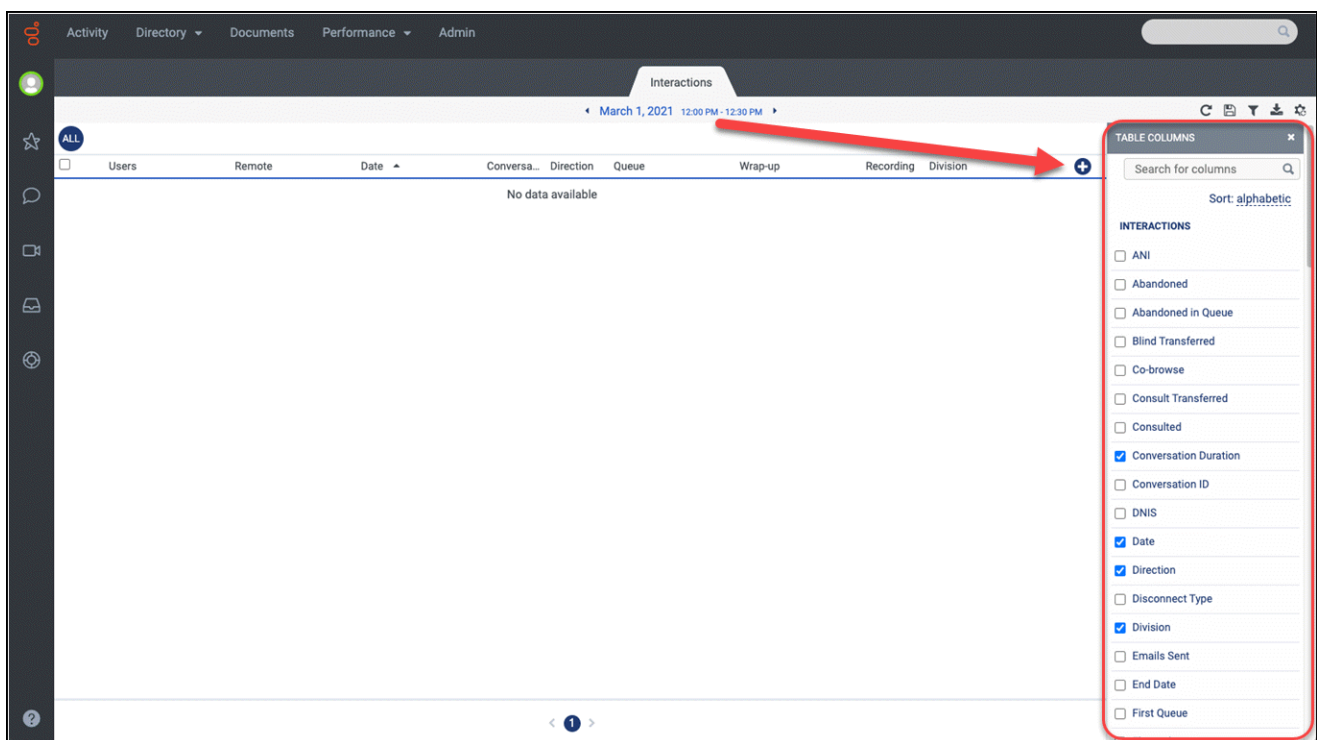
- UUIDv3 (Genesys Cloud Interaction ID): ca6c4e5f-38f8-3df9-a080-5b17ad27ef8c

Tip

Consultation calls can cause different CallUUIDs to be generated for the same call, separate from the initiating call segment. When using standard UUIDv3 generators and mapping Genesys Cloud Interaction IDs, be sure to use only the CallUUID from the initial call segment.

Filtering data in the Interactions table

Genesys Engage synchronizes the data that appears in the columns in the Interactions table in Genesys Cloud, enabling users to display and filter Interactions.



Genesys Engage supports a number of filter criteria in Genesys Cloud. To open the **TABLE COLUMNS** list, click the + (plus sign) in the top row of the Interactions table (see the graphic here).

Filtering on the supported columns in the Interactions table ensures you'll obtain optimal, consistent results. Genesys recommends using only the supported criteria shown in the tables below when filtering interactions.

Tip

The **Remote** column contains some aggregated data that can be filtered, such as External Contact data (caller's name, phone number, email address), but this data is not synchronized by Genesys Engage and therefore, is not fully supported. You might obtain the desired result filtering on some data in this column, but not all. Using unsupported criteria to filter the Interactions data might produce inconsistent results.

Genesys Engage supports filtering on column names in the Interactions table in two categories: **Interactions** and **Metrics**.

Interactions: Genesys Engage supported filter criteria		
ANI	Date	Non-ACD
Abandoned	Direction	Provider
Abandoned in Queue	Disconnect Type	Queue
Blind Transferred	Division	Recording
Consult Transferred	End Date	Transferred
Consulted	First Queue	Users
Conversation Duration	Initial Direction	Users - Alerted
Conversation ID	Last Wrap-Up	Users - Interacted
DNIS	Media Type	Wrap-Up

Metrics: Genesys Engage supported filter criteria			
Alert Segments	IVR Segments	Total Alert	Total Talk
Blind Transfers	Queue Segments	Total Handle	Transfers
Consult Transfers	Talk Segments	Total Hold	User Segments
Consults	Time to Abandon	Total IVR	Wrap-Up Segments
Hold Segments	Total ACW	Total Queue	

To find a description of a metric, use the Help in the Genesys Cloud Resource Center.

Agent states, reason codes, and agent presence

Workforce Management (WFM) determines if agents are adherent by comparing their real-time state, plus the reason code (if available) with the scheduled states within specified time intervals. If at least one scheduled state can be mapped to the real-time state, the agent is considered adherent. Some reason codes are used to prevent the agent's adherence from being negatively affected if they are logged off or busy for any length of time, but technically still adherent—for example, on a scheduled break or in training.

Genesys Engage synchronizes agent status to agent presence in Genesys Cloud, but Genesys Cloud uses an aggregated concept for agent presence. Therefore, if you want the agent presence in Genesys Cloud to include Meal, Break, Training, or Meeting, you must manually synchronize them by creating custom agent states in Genesys Engage so that this same value can be used as the agent presence. If there is no reason code, or the value is something other than one of the four mentioned, Genesys Cloud uses Busy for the agent presence. See the following table, for examples:

Agent states, reason codes, and presence

Genesys Engage		Genesys Cloud
Agent state	Reason code	Agent presence
Not Ready		Busy
Not Ready	Meal	Meal
Not Ready	Break	Break
Not Ready	Training	Training
Not Ready	Meeting	Meeting

Creating custom agent states in Genesys Engage

Use the following procedure to create custom Not Ready states:

Link to video

1. In the Genesys Engage portal, click **Agent Setup**.
2. In the left-side navigation pane, select **Custom Agent States**.
3. Under **Not Ready**, enter the **Display Name**. For example, Training.
4. Enter the **Code**. For example, Training.
5. Click **Add**, and then **Save**.

Mapping agent states to agent presence

The following tables show how the Genesys Engage supported agent states map to Genesys Cloud agent presence and routing statuses:

Tip

In the first table "No change" means that Genesys Cloud relies on the status that exists before the call is accepted or dialed. For example, if an agent receives a call while in the Ready state, and subsequently enters the After Call Work state, the status in Genesys Cloud is On Queue throughout the call and during after call work.

When there is an active call:

Genesys Engage agent state	Genesys Cloud agent presence	Genesys Cloud routing status
Dialing	No change	Communicating
Connected (ACD call)	No change	Interacting
Connected (Internal call)	No change	Communicating
Disconnected	No change	Idle
After Call Work	No change	Interacting

When there is no active call:

Genesys Engage agent state	Genesys Cloud agent presence	Genesys Cloud routing status
Ready	On Queue	Idle
Not Ready	Busy	Off Queue
Not Ready - Break	Break	Off Queue
Not Ready - Meal	Meal	Off Queue
Not Ready - Meeting	Meeting	Off Queue
Not Ready - Training	Training	Off Queue
Log Off	Offline	Off Queue

Recommendation for disposition codes

Workforce Web Edition (WWE) uses disposition codes to characterize the outcome of an interaction.

Disposition codes have both `Name` and a `Display Name` attributes:

- `Name`—This attribute is unique. It's the value that is synchronized from Genesys Engage to Genesys Cloud.
- `Display Name`—This attribute is arbitrary. It's the value that is displayed to agents in WWE. Since it doesn't have a uniqueness constraint, multiple disposition codes can share the same display name.

The UIs in Genesys Engage display disposition codes as the `Display Name`, but the UIs in Genesys Cloud display them as the `Name`. As a best practice, and to avoid difficulties when trying to correlate the values in Genesys Engage to Genesys Cloud, we recommend applying similar values to the `Name` and `Display Name` attributes.

Frequently asked questions

Post-call surveys

Q: After integration, do post-call surveys that are created in Genesys Cloud use recording policies and survey flows in Architect?

A: No. For integrations, Genesys Engage handles the routing and processing of interactions and then uploads them to Genesys Cloud. In this case, Genesys Cloud does not handle the routing function, so Architect is not used.

Multiple Divisions in Genesys Cloud

Q: After integration, can I create more than one Division for my Organization in Genesys Cloud?

A: No. After integration with Genesys Cloud, Genesys Engage supports only a single Division—the default Home Division.

Related Use Cases

The following Workforce Engagement Use Cases provide business context and outline the benefits associated with the Workforce Engagement Management features and capabilities:

- Quality Assurance and Compliance (WE01) for Genesys Cloud
- Resource Management (WE02) for Genesys Cloud
- Employee Performance (WE03) for Genesys Cloud