Genesys Customer Experience Insights User's Guide

Using Attached Data

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Using Attached Data

Use the information on this page to customize the GCXI projects and reports, to provide results that are organized based on your own business's user data.

Contents

Configuring Social Media User Data

The Social Engagement Report relies on how user data is configured in your environment, and on the strategies you use to route interactions. This section describes how to set up your environment to report on social media user data. The Social Engagement Report and the objects that directly support it are described on the Agent Social Engagement Report page. Perform the following steps to configure social media user data:

1. Review the routing strategies in your environment with respect to user data and update them as appropriate.
   The default Genesys-provided routing strategies do not set the **Sent** reason when responses are sent. You must design your strategy to change the **StopProcessing** reason from `Normal` to `Sent` when this event occurs. If you do not do so, the GCXI third-party media reports generate results for transfers only—not for responses.

2. The Genesys Info Mart installation package includes a sample attached-data specification file, ccon_adata_spec_GIM_example.xml, that controls which user data KVPs Interaction Concentrator (ICON) stores. In it, the required social media KVPs are listed, but commented out. If you base your ICON attached-data specification file on ccon_adata_spec_GIM_example.xml, uncomment the appropriate rows to enable ICON to record the required data.
   In the attached-data specification file, ensure that the following keys are specified:

   - Classify_Actionability_CtgRelevancy
   - Classify_Sentiment_CtgRelevancy
   - KloutScore
   - CtgName
   - Screen_Sentiment_CtgName
   - Screen_Actionability_CtgName
   - Classify_Actionability_CtgName
   - Classify_Sentiment_CtgName
   - desktop_influence

   Place this file in ICON's root directory. Refer to Steps 1 and 2 of Enabling Reporting on User Data in the *Genesys Info Mart Deployment Guide* for detailed instructions.

3. Run `make_gim_UDE_template_<rdbms>.sql` against the Info Mart database to create the database objects for social media detail reporting. This SQL script is deployed in the **\script** subfolder as part of a GCXI installation. Refer to the Application Files chapter of the *Reporting and Analytics Aggregates Deployment Guide* for more information.

4. Run aggregation in autonomous mode and specify the **setFeature** runtime parameter as follows:
   `-setFeature=eServicesSM`

   This parameter enables RAA to aggregate social media data, including mapping GEN_ES_KEY (in the IRF_USER_DATA_KEYS table) to USER_DATA_KEY1 in the H_ID, H_AGENT, and H_AGENT_QUEUE hierarchies.

   Note that USER_DATA_KEY1 can be mapped only once per hierarchy. If you previously mapped this field to CUSTOM_KEY_10 (as instructed in step 2 of Example - Custom Handling Attempt Report)

for the **Product Line** example, then consider mapping USER_DATA_KEY2 to CUSTOM_KEY_10 instead.

Refer to the *Reporting and Analytics Aggregates User's Guide* to learn how to run aggregation in this autonomous mode.

Your environment is ready to process social media user data for each interaction, and RAA is equipped to aggregate this data. You can now use the Agent Social Engagement and Social Engagement reports to retrieve meaningful data.

The following section describes additional objects, some of which indirectly support social media user data reporting.

User Data Objects in Project

The Predefined User Data Objects table lists key objects that are related to user data.

Predefined User Data Objects

Agent\Activity			
Object Type and Name (M=Metric, A = Attribute/Dimension)		**User Data Table and Field**	**Char or Numeric**
M	Actionability	AG2_AGENT_*.ACTIONABILITY AG2_AGENT_GRP_*.ACTIONABILITY AG2_AGENT_QUEUE_*.ACTIONABILITY	Numeric
M	Influence Score	AG2_AGENT_*.INFLUENCE AG2_AGENT_GRP_*.INFLUENCE AG2_AGENT_QUEUE_*.INFLUENCE	Numeric
M	Offered with Actionability	AG2_AGENT_*.ACTIONABILITY_OFFERED AG2_AGENT_GRP_*.ACTIONABILITY_OFFERED AG2_AGENT_QUEUE_*.ACTIONABILITY_OFFERED	Numeric
M	Offered with Influence	AG2_AGENT_*.INFLUENCE_OFFERED AG2_AGENT_GRP_*.INFLUENCE_OFFERED AG2_AGENT_QUEUE_*.INFLUENCE_OFFERED	Numeric
M	Offered with Sentiment	AG2_AGENT_*.SENTIMENT_OFFERED AG2_AGENT_GRP_*.SENTIMENT_OFFERED	Numeric

Agent\Activity			
		AG2_AGENT_QUEUE_*.SENTIMENT_OFFERED	
M	SentimentScore	AG2_AGENT_*.SENTIMENT AG2_AGENT_GRP_*.SENTIMENT AG2_AGENT_QUEUE_*.SENTIMENT	Numeric
Agent\Activity\Activity User Data Example			
A	Dimension 1 Dimension 2 ... Dimension 5	USER_DATA_CUST_DIM_1.DIM_ATTRIBUTE_1 USER_DATA_CUST_DIM_1.DIM_ATTRIBUTE_2 USER_DATA_CUST_DIM_1.DIM_ATTRIBUTE_5	Char
A	Dimension 6 ... Dimension 10	USER_DATA_CUST_DIM_2.DIM_ATTRIBUTE_1 USER_DATA_CUST_DIM_2.DIM_ATTRIBUTE_5	Char
A	Screen Actionability Category	USER_DATA_GEN_ES.SCREEN_ACTIONABILITY_CTGNAME	Char
A	Screen Sentiment Category	USER_DATA_GEN_ES.SCREEN_SENTIMENT_CTGNAME	Char
Business Attribute\BA Customer			
M	Actionability Score	AG2_ID_*.ACTIONABILITY	Numeric
M	Entered with Actionability	AG2_ID_*.ACTIONABILITY_ENTERED	Numeric
M	Entered with Influence	AG2_ID_*.INFLUENCE_ENTERED	Numeric
M	Entered with Sentiment	AG2_ID_*.SENTIMENT_ENTERED	Numeric
M	Influence Score	AG2_ID_*.INFLUENCE	Numeric
M	Sentiment Factor	a factor of BA User Data Example\Classify Sentiment Category	Numeric
M	Sentiment Score	AG2_ID_*.SENTIMENT	Numeric
Business Attribute\BA User Data Example			
A	Dimension 1 Dimension 2 ... Dimension 5	USER_DATA_CUST_DIM_1.DIM_ATTRIBUTE_1 USER_DATA_CUST_DIM_1.DIM_ATTRIBUTE_2 USER_DATA_CUST_DIM_1.DIM_ATTRIBUTE_5	Char
A	Dimension 6	USER_DATA_CUST_DIM_2.DIM_ATTRIBUTE_1	Char

Agent\Activity			
	... Dimension 10	USER_DATA_CUST_DIM_2.DIM_ATTRIBUTE_5	
A	Screen Actionability Category	USER_DATA_GEN_ES.SCREEN_ ACTIONABILITY_CTGNAME	Char
A	Screen Sentiment Category	USER_DATA_GEN_ES.SCREEN_ SENTIMENT_CTGNAME	Char
Detail\Handling Attempt\Handling User Data Example			
A	Detail 1 Detail 2 ... Detail 14 Detail 15 Detail 16	IRF_USER_DATA_CUST_1.CUSTOM_DATA_1 IRF_USER_DATA_CUST_1.CUSTOM_DATA_2 IRF_USER_DATA_CUST_1.CUSTOM_DATA_14 IRF_USER_DATA_CUST_1.CUSTOM_DATA_15 IRF_USER_DATA_CUST_1.CUSTOM_DATA_16	Char Char Char Numeric Numeric
A	Dimension 1 Dimension 2 ... Dimension 5	USER_DATA_CUST_DIM_1.DIM_ATTRIBUTE_1 USER_DATA_CUST_DIM_1.DIM_ATTRIBUTE_2 USER_DATA_CUST_DIM_1.DIM_ATTRIBUTE_5	Char
A	Dimension 6 ... Dimension 10	USER_DATA_CUST_DIM_2.DIM_ATTRIBUTE_1 USER_DATA_CUST_DIM_2.DIM_ATTRIBUTE_5	Char
Queue\Queue User Data Example			
A	Dimension 1 Dimension 2 ... Dimension 5	USER_DATA_CUST_DIM_1.DIM_ATTRIBUTE_1 USER_DATA_CUST_DIM_1.DIM_ATTRIBUTE_2 USER_DATA_CUST_DIM_1.DIM_ATTRIBUTE_5	Char
A	Dimension 6 ... Dimension 10	USER_DATA_CUST_DIM_2.DIM_ATTRIBUTE_1 USER_DATA_CUST_DIM_2.DIM_ATTRIBUTE_5	Char
Detail\Transfer\Source User Data Example			
A	Dimension 1 Dimension 2	USER_DATA_CUST_DIM_1.DIM_ATTRIBUTE_1 USER_DATA_CUST_DIM_1.DIM_ATTRIBUTE_2	Char

Agent\Activity			
	... Dimension 5	USER_DATA_CUST_DIM_1.DIM_ATTRIBUTE_5	
A	Dimension 6 ... Dimension 10	USER_DATA_CUST_DIM_2.DIM_ATTRIBUTE_1 Char USER_DATA_CUST_DIM_2.DIM_ATTRIBUTE_5	
Detail\Transfer\Target User Data Example			
A	Dimension 1 Dimension 2 ... Dimension 5	USER_DATA_CUST_DIM_1.DIM_ATTRIBUTE_1 USER_DATA_CUST_DIM_1.DIM_ATTRIBUTE_2 Char USER_DATA_CUST_DIM_1.DIM_ATTRIBUTE_5	
A	Dimension 6 ... Dimension 10	USER_DATA_CUST_DIM_2.DIM_ATTRIBUTE_1 Char USER_DATA_CUST_DIM_2.DIM_ATTRIBUTE_5	
Queue\Queue User Data Example			
A	Dimension 1 Dimension 2 ... Dimension 5	USER_DATA_CUST_DIM_1.DIM_ATTRIBUTE_1 USER_DATA_CUST_DIM_1.DIM_ATTRIBUTE_2 Char USER_DATA_CUST_DIM_1.DIM_ATTRIBUTE_5	
A	Dimension 6 ... Dimension 10	USER_DATA_CUST_DIM_2.DIM_ATTRIBUTE_1 Char USER_DATA_CUST_DIM_2.DIM_ATTRIBUTE_5	

User data key table mapping

The following tables — Low Cardinality — Key table mapping and High Cardinality — Key table mapping — describe the default / recommended mapping for user data tables.

Low Cardinality — Key table mapping

GCXI / Object name	Key table mapping				Comments
	Genesys Info Mart database table name	Dimension table PK name	UDE key name <-> IRF_USER_DATA_KEYS	GCXI Schema objects	

CX Insights\ GCXI\Business Attribute \Business Result	INTERACTION_DESCRIPTOR	INTERACTION_DESCRIPTOR_KEY	INTERACTION_DESCRIPTOR_KEY	AG2_xxx.INTERACTION_DESCRIPTOR_KEY	This table is provided with the default schema to store Genesys-defined, low-cardinality KVPs, such as service type and customer segment. This table requires no customization.
CX Insights\ GCXI\Business Attribute \Customer Segment					
CX Insights\ GCXI\Business Attribute \Service Type					
CX Insights\ GCXI\Business Attribute \Service SubType					
CX Insights\ GCXI\User Data Example \Dimension 1-Dimension 5	USER_DATA_CUST_DIM_1		CUSTOM_KEY_1	AG2_xxx.USER_DATA_KEY1	
CX Insights\ GCXI\User Data Example \Dimension 1-Dimension 5	USER_DATA_CUST_DIM_2		CUSTOM_KEY_2	AG2_xxx.USER_DATA_KEY2	
CX Insights\ GCXI\User Data Example \GSW Call Type, Dimension 2 Gen – Dimension 5 Gen	USER_DATA_GEN_DIM_1		USER_DATA_GEN_KEY_1	AG2_xxx.USER_DATA_GEN_KEY1	
CX Insights\ GCXI\User Data Example \Dimension 6 Gen – Dimension 10 Gen	USER_DATA_GEN_DIM_2		USER_DATA_GEN_KEY_2	AG2_xxx.USER_DATA_GEN_KEY2	

High Cardinality — Key table mapping

GCXI / Object name	Key table mapping				Comments
	Genesys Info Mart database table name	Dimension table PK name	UDE key name <-> IRF_USER_DATA_KEYS	GCXI Schema objects	
CX Insights\	IRF_USER_DATA_CUST_1	CUSTOM_DATA_[1-16]		IRF_USER_DATA_CUST_1.CUSTOM_DATA_[1-16]	

GCXI\Detail\ Handling Attempt\ Handling User Data Example \Detail 1 – Detail 16					
CX Insights\ GCXI\Detail\ Handling Attempt \Case ID	IRF_USER_DATA_GEN_1	CASE_ID	na	IRF_USER_DATA_GEN_1.CASE_ID	
CX Insights\ GCXI\Detail\ Handling Attempt \Customer_ID	IRF_USER_DATA_GEN_1	CUSTOMER_ID	na	IRF_USER_DATA_GEN_1.CUSTOMER_ID	
CX Insights\ GCXI\Detail\ Handling Attempt \Revenue	IRF_USER_DATA_GEN_1	REVENUE	na	IRF_USER_DATA_GEN_1.REVENUE	
CX Insights\ GCXI\Detail\ Handling Attempt \Satisfaction	IRF_USER_DATA_GEN_1	SATISFACTION	na	IRF_USER_DATA_GEN_1.SATISFACTION	

Using the Predefined User Data Objects

If the user data that you configured within your environment exactly matches the sample tables that have been imported into the Project—as well as their structure—all you have to do to use the predefined user data objects in custom reports is make visible the corresponding objects, and save the project. The objects will be revealed to report designers and can be used in reports. If, however, your user data configuration employs different tables or table structure, perform the following steps:

1. If necessary, add the appropriate user data table(s) to the GCXI schema. (See step 4 of Example - Custom Handling Attempt Report.)
2. Alter user data object definitions if you want. For example::
   - Fields in the IRF_USER_DATA_CUST_* tables could be numeric or character.
   - If your user data table is named differently from that which is used in the table above.
   - If you want the attribute to reference a field different from that which is already defined for the object.
   - If you want to have the attribute available as a user prompt on a custom report. (See step 5 of Example - Custom Handling Attempt Report)
   - If you want to rename the predefined folders, attributes, or metrics.
3. Save the project.

Special Note about Numeric User Data

The Customer Perspective Report includes four measures that are based on numeric user data—**Revenue**, **Satisfaction**, **Avg Revenue**, and **Avg Satisfaction**. Running aggregation (to populate the data for this report) will yield errors if users are permitted to attach non-numeric data for these business attributes to interactions. You must ensure that the resources that set the values of Revenue and Satisfaction user data keys are configured or trained, as applicable, to record numerical values only. Refer to Check for Incorrect Data Type in the *Reporting and Analytics Aggregates User's Guide* to learn how to recover from this situation.

In addition to the information on this page, see:

- Example - Custom Handling Attempt Report