Genesys Interactive Insights User's Guide

Using Attached Data

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This section provides information to help you customize the GI2 universe and reports to provide results that are dimensioned by your own business's user data.

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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 universe objects that directly support it are described in the *Genesys Interactive Insights Universe Guide*. Perform the following steps to configure social media user data:

[+] Show Steps

1. Review the routing strategies in your environment with respect to user data and update them as appropriate. Note that 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 GI2 third-party media reports generate results for transfers only—not for responses.
2. In the `ccon_adata_spec_GIM_example.xml` file that is provided within the Genesys Info Mart installation package, uncomment the appropriate rows to enable Interaction Concentrator (ICON) to record data for the following user data keys:
   - 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 GI2 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 - Product Line and Product) 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 hidden universe objects, some of which indirectly support social media user data reporting.

Hidden User Data Objects in GI2_Universe

Universe objects that report on user data, and which are visible to report designers and viewers, are described in the *Genesys Interactive Insights Universe Guide*. Some objects, however, are hidden in the universe.

The table following table lists those hidden objects that are related to user data. You must properly set up your environment and unhide these objects before you can use them to create reports.

[+] Predefined, Hidden User Data Objects

Class and Member		User Data Table and Field	Char or Numeric
Agent\Activity			
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 AG2_AGENT_QUEUE_*.SENTIMENT_OFFERED	Numeric

Class and Member		User Data Table and Field	Char or Numeric
M	SentimentScore	AG2_AGENT_*.SENTIMENT AG2_AGENT_GRP_*.SENTIMENT AG2_AGENT_QUEUE_*.SENTIMENT	Numeric
Agent\Activity\Activity User Data Example			
D	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
D	Dimension 6 ... Dimension 10	USER_DATA_CUST_DIM_2.DIM_ATTRIBUTE_1 USER_DATA_CUST_DIM_2.DIM_ATTRIBUTE_5	Char
D	Screen Actionability Category	USER_DATA_GEN_ES.SCREEN_ACTIONABILITY_CTGNAME	Char
D	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			
D	Dimension 1 Dimension 2 ... Dimension 5 Dimension 6 ... Dimension 10	USER_DATA_CUST_DIM_1.DIM_ATTRIBUTE_1 USER_DATA_CUST_DIM_1.DIM_ATTRIBUTE_2 USER_DATA_CUST_DIM_1.DIM_ATTRIBUTE_5 USER_DATA_CUST_DIM_2.DIM_ATTRIBUTE_1 USER_DATA_CUST_DIM_2.DIM_ATTRIBUTE_5	Char

Class and Member		User Data Table and Field	Char or Numeric
D	Screen Actionability Category	USER_DATA_GEN_ES.SCREEN_ACTIONABILITY_CTGNAME	Char
D	Screen Sentiment Category	USER_DATA_GEN_ES.SCREEN_SENTIMENT_CTGNAME	Char
Flow\Flow User Data Example			
M	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
Handling Attempt\Handling User Data Example			
M	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
Queue User Data Example			
D	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
D	Dimension 6 ... Dimension 10	USER_DATA_CUST_DIM_2.DIM_ATTRIBUTE_1 USER_DATA_CUST_DIM_2.DIM_ATTRIBUTE_5	Char

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 GI2_universe—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 universe elements

and save and export the universe to the BI repository. The objects will be revealed to report designers and can be used in reports just like any other universe object. If, however, your user data configuration employs different tables or table structure, perform the following steps within Web Intelligence to avail their use to report designers:

[+] Show Steps

1. If necessary, add the appropriate user data table(s) to GI2 universe schema. (See step 4 of Example - Product Line and Product.)
2. To use the predefined user data objects, show only those objects that you intend to use. User data classes, dimensions, and measures are marked as hidden within the universe so that they are not available to report designers before their time.
3. Alter user data object definitions, as needed:
   - For instance, fields in the IRF_USER_DATA_CUST_* tables could be numeric or character.
   - Perhaps your user data table is named differently from that which is used in the table above.
   - Perhaps you want the dimension or detail to reference a field different from that which is already defined for the object.
   - Perhaps you want to reference a list of values and have the dimension available as a user prompt on a custom report. (See step 5 of Example - Product Line and Product)
   - Perhaps you want to rename the predefined classes, dimensions, or measures.
4. Save the universe and export it to the BI repository.

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 - Product Line and Product