GENESYS

Genesys Engage cloud Training Basics

Genesys Engage cloud Public

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Learning the basics of Genesys Engage cloud

New to Genesys Engage cloud? Need a refresher? Click below to find learning that fits your need.

More in-depth training is available from Genesys University. For other documentation for our Cloud products, see Genesys Engage cloud.

Agent learning basics

Supervisor learning basics

Administrator learning basics

Business user learning basics

Executive learning basics

Agent 101

Just getting started with Pure Engage Cloud? Let's begin with what most agents do daily. Feel free to work through the First 10, try some of the Most popular tasks, or browse Learning by app to find specific tasks you want to learn.

If you're looking for more information for agents working in Pure Engage Cloud, see the Agent's Guide.

First 10

Learn these ten tasks to get you up to speed.

1. Get started (log in, change status, handle a call) (+video)

2. Take calls (+video)

3. Ask for help from another team member (+video)

4. Use standard responses (+video)

5. Deal with customer emails (+video)

6. Chat with a customer (+video)

7. Work on an outbound campaign

8. Handle a Facebook interaction (+video)

9. Manage your schedule

10. Find your contacts (+video)

Most popular

Agents use these topics most often.

1. Take calls (+video)

2. Ask for help from another team member (+video)

3. Manage your schedule

4. Use standard responses (+video)

5. Trade shifts

6. Bid for schedules

7. Tour Agent Desktop (+video)

8. Find your contacts (+video)

Learning by app

Here's a more complete list of learning topics to get you started, organized by application.

Agent Desktop

You do most of your work—interacting with customers and communicating with fellow team members—in the Agent Desktop application.

- Get started with Agent Desktop (+video)

- Tour the application (+video)

- Take calls (+video)

- Ask for help from another team member (+video)

- Find your contacts (+video)

- Use standard responses (+video)

- Deal with customer emails (+video)

- Chat with a customer (+video)

- Handle a Facebook interaction (+video)

- Respond to a Tweet (+video)

- Manage your workbins (+video)

- Work on an outbound campaign

- Retrieve your voicemail

- Manage your voicemail greetings

- Check your reports

Workforce Management

You manage your schedule, request days off, and trade shifts within the Workforce Management application.

- Workforce Management Web for Agents overview

- Get started with Workforce Management

- Manage your schedule

- Trade shifts

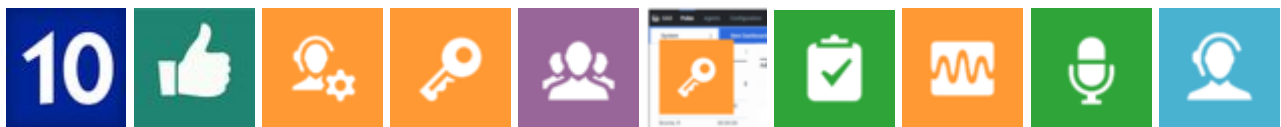- Request and track time off

- Bid for schedules

Contact us

If you have questions about any of the tasks, or would like to see additional tasks, send an email to Technical Publications Administrator.

Supervisor 101

Just getting started with Pure Engage Cloud? Let's start with what most supervisors do daily. Feel free to work through the First 10, try some of the Most popular tasks, or browse Learning by app to find specific tasks you want to learn.

If you're looking for more information for supervisors working in Pure Engage Cloud, see the Supervisor's Guide and the Adminstrator's Guide.

First 10

Learn these ten tasks to get you up to speed.

1. Genesys Portal apps
2. Create agents and assign skills
3. Learn about the schedule module
4. Create forecast scenarios, staffing forecast, and build and publish schedules

5. Work with time-off rules: overview and procedure

6. Supervise agents

7. Monitor contact center performance through Workforce Management

8. Monitor contact center performance using real-time reporting

9. Generate IVR (GVP) reports

10. Generate historical reports (+video)

Most popular

Supervisors use these topics most often.

1. Create agents and assign skills

2. View the master agent schedule

3. Add a calendar item

4. Monitor and display agent adherence

5. Monitor contact center performance through Workforce Management

6. Monitor contact center performance through real-time reporting

7. Generate IVR (GVP) reports

8. Read IVR reports

9. Read historical (Agents, Business Results, Details, Outbound Contact, Queues) reports

10. Review, search, and play recorded calls

Learning by app

Here's a more complete list of learning topics to get you started, organized by application.

General

- Introduction and how to log in to the interfaces

Agent Setup

You can use Agent Setup to create and provision your agents.

- Add and provision an agent

Platform Administration

You perform general platform administration tasks within the Platform Administration application.

- Create agents and assign skills and other characteristics

Workforce Management

You do much of your work managing your workforce using the Workforce Management application.

- Get started with Workforce Management Web for Supervisors
- Schedules:
    - Introduction to the schedule module and and what schedules rely on
    - Create forecast scenarios, staffing forecast, and build and publish schedules
- Insert a break
- View the master schedule
- View the calendar
- Add a calendar item
- Access and work with modules and objects: overview and description (Adherence, Calendar, Configuration, Forecast, Performance, Policies, Schedule, and Trading)
- Understand bidding and how to set it up
- Learn how trading works

- Work with time-off rules: overview and procedure
- Monitor/display agent adherence
- Monitor contact center performance

Real-time Reporting

You track what's happening at your contact center in real-time using the Genesys Pulse tab within the Platform Administration application.

- Monitor the contact center performance through real-time reporting
- Understand real-time reports
- Add a report widget to a dashboard
- Understand and choose a widget type
- Display external content (IFRAME)
- Give users permission to customize their dashboard

Historical Reporting

You access historical reports within the Reporting application that leverages Genesys Interactive Insights.

- Get started
  - Log in and access reports
  - Generate historical reports/quick tour (+video)
  - Navigate Genesys Interactive Insights
  - Export and save reports
  - Read historical reports (understand what is happening in my contact center)
- Learn what historical reports are available:
  - Business Edition: the most popular reports, tailored to cloud users
  - Agents: reports about monitored agents
  - Business Results: reports about business results, customer segment, service type, and/or service

      subtype business attributes

- Callback: reports about callback usage, including success rates, scheduling, and wait times

- Details: reports about agent-summarized states and login details, interaction-handling attempts, and interaction flows

- Outbound Contact: reports about outbound campaigns, including summaries of campaign activity, campaign callbacks, and contact list performance

- Queues: reports about interaction flows routed through an ACD queue, virtual-queue, interaction queue, workbin, and queue-group objects

- Customize reports

IVR Administration

You access IVR (Interactive Voice Response) reports and set filters through the IVR Administration application.

- Generate and read IVR (GVP) reports
- Introduction to filtering data in reports:
    - Call Browser
    - Dashboard
    - Operational
    - Value-added Reporting (VAR)

Recording

You work with recording within the Recording application that leverages SpeechMiner and Quality Management.

- Review, search, and play recorded calls

Agent Desktop

As your agents do most of their work—interacting with customers and communicating with fellow team members—in the Agent Desktop application, here are two training topics to give you an overview of it.

- Get started with Agent Desktop (+video)
- Look through the application (+video)
- Learn about:
    - Channels (calls, email, chat, Facebook, Twitter)
    - Customer interactions
    - Internal interactions (consults, conferences, transfers, messages)
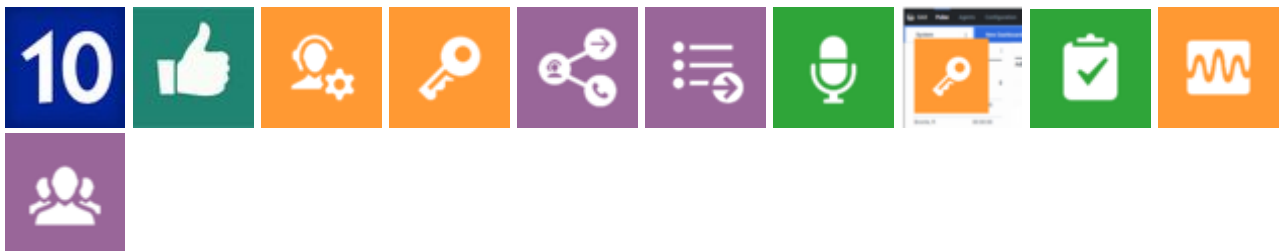- Supervise agents

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Administrator 101

Just getting started with Pure Engage Cloud? Let's start with what most administrators do. Feel free to work through the First 10, try some of the Most popular tasks, or browse Learning by app to find specific tasks you want to learn.

First 10

Learn these ten tasks to get you up to speed.

1. Get started

2. Platform Administration overview

3. Configure accounts

4. Create agents and assign skills

5. Configure switch-related objects

6. Manage voicemail

7. Introduction to Genesys Designer (+video) (login required)

8. Monitor contact center performance using real-time reporting

9. Generate historical reports (+video)

10. Generate IVR (GVP) reports

Most popular

Administrators use these topics most often.

1. Configure accounts

2. Create agents and assign skills

3. Configure switch-related objects

4. Manage voicemail

5. Use Blocks in a Designer Application (login required)

6. Create and modify emergency flags (login required), business hours (login required), and special days (login required)

7. Generate historical reports/quick tour (+video)

8. Understand and choose a Pulse widget type

9. Configure compliance rules and create campaign templates

10. Manage campaigns and users

Learning by app

Here's a more complete list of learning topics to get you started, organized by application.

General

- Getting Started for Administrators
- Install and configure the Genesys Softphone

Agent Setup

You can use Agent Setup to create and provision your agents, and to configure Agent Desktop for your agents.

- Add and provision an agent
- Configure your contact center

Platform Administration

You perform platform administration tasks within the Platform Administration application.

- Platform Administration overview
- Configure accounts
- Create agents and assign skills and other characteristics
- Configure switch-related objects
- Manage voicemail

Designer

- Introduction to Genesys Designer (+video) (login required)
- Get started with the Quick Start Guide (login required)

- Create an Application (login required)

- Use Blocks in an Application (login required)

- Assign a phone number to an Application and enable the Application (login required)

- Understand, create, and upload audio resources (text-to-speech and audio files) (login required)

- Introduction to business controls (formerly operations management) (login required)

- Create and modify emergency flags (login required), business hours (login required), and special days (login required)

- Create and modify data tables (login required)

Outbound

- Configure compliance rules and create campaign templates

- Manage campaigns and users

- Set up outbound routing

Recording

You work with recording within the Recording application that leverages SpeechMiner and Quality Management.

- Review, search, and play recorded calls

- Encrypt recordings

- Configure screen recording

Real-time Reporting

You track what's happening at your contact center in real-time using the Genesys Pulse tab within the

Platform Administration application.

- Monitor the contact center performance through real-time reporting

- Understand real-time reports

- Add a report widget to a dashboard

- Understand and choose a widget type

- Display external content (IFRAME)

- Give users permission to customize their dashboard

Historical Reporting

You access historical reports within the Reporting application that leverages Genesys Interactive Insights.

- Get started

  - Log in and access reports

  - Navigate Genesys Interactive Insights

  - Generate historical reports/quick tour (+video)

  - Export and save reports

  - Read historical reports (understand what is happening in my contact center)

- Learn what historical reports are available:

  - Business Edition: the most popular reports, tailored to cloud users

  - Agents: reports about monitored agents

  - Business Results: reports about business results, customer segment, service type, and/or service subtype business attributes

  - Callback: reports about callback usage, including success rates, scheduling, and wait times

  - Details: reports about agent-summarized states and login details, interaction-handling attempts, and interaction flows

  - Outbound Contact: reports about outbound campaigns, including summaries of campaign activity, campaign callbacks, and contact list performance

  - Queues: reports about interaction flows routed through an ACD queue, virtual-queue, interaction queue, workbin, and queue-group objects

- Customize reports

IVR Administration

You can set up your IVR (Interactive Voice Response) and access IVR reports and set filters through the IVR Administration application.

- Provision IVR profiles
- Manage Personalities and Audio resources
- Manage IVR parameters, parameter groups, and parameter group templates
- Generate and read IVR (GVP) reports
- Introduction to filtering data in reports:
  - Call Browser
  - Dashboard
  - Operational
  - Value-added Reporting (VAR)

Workforce Management

You can monitor your contact center workforce using the Workforce Management application.
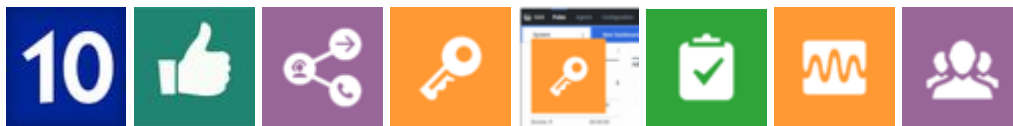
- Monitor contact center performance

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Business user 101

Just getting started with Pure Engage Cloud? Let's start with what most business users do daily. Feel free to work through the First 10, try some of the Most popular tasks, or browse Learning by app to find specific tasks you want to learn.

First 10

Learn these ten tasks to get you up to speed.

1. Introduction to Genesys Designer (+video) (login required)
2. Getting started with the Quick Start Guide (login required)
3. Using Blocks in an Application (login required)
4. Understand skills and skills-based routing
5. Understand, create, and upload audio resources: text-to-speech and audio files (login required)
6. Work with business controls, like emergency flags, business hours, special days, and data tables (login required)

7. Monitor contact center performance through Workforce Management

8. Monitor contact center performance using real-time reporting

9. Generate historical reports (+video)

10. Generate IVR (GVP) reports

Most popular

Business Users rely on these topics most often.

1. Getting started with the Quick Start Guide (login required)

2. Creating an Application (login required)

3. Assigning a phone number to an Application and enabling the Application (login required)

4. Working with business controls, like emergency flags, business hours, special days, and data tables (login required)

5. Understand, creating, and uploading audio resources (text-to-speech and audio files) (login required)

6. Monitoring the contact center performance through real-time reporting

7. Add a report widget to a dashboard

8. Generate historical reports/quick tour (+video)

9. Read historical reports (understanding what is happening in my contact center)

10. Generate and read IVR (GVP) reports

Learning by app

Here's a more complete list of learning topics to get you started, organized by application.

Designer

- Introduction to Genesys Designer (+video) (login required)
- Get started with the Quick Start Guide (login required)
- Create an Application (login required)
- Use Blocks in an Application (login required)
- Assign a phone number to an Application and enabling the Application (login required)
- Understand, create, and upload audio resources (text-to-speech and audio files) (login required)
- Introduction to business controls (formerly operations management) (login required)
- Creating and modifying emergency flags (login required), business hours (login required), and special days (login required)
- Create and modify data tables (login required)

Platform Administration

You perform general platform administration tasks within the Platform Administration application.

- Get started
- Provision your contact center
- Understand skills and skills-based routing
- Understand teams/agent groups

Real-time Reporting

You track what's happening at your contact center in real-time using the Genesys Pulse tab within the Platform Administration application.

- Monitor the contact center performance through real-time reporting
- Understand real-time reports
- Add a report widget to a dashboard
- Understand and choose a widget type
- Display external content (IFRAME)

Historical Reporting

You access historical reports within the Reporting application that leverages Genesys Interactive Insights.

- Get started
    - Log in and access reports
    - Navigate Genesys Interactive Insights
    - Generate historical reports/quick tour (+video)
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    - Queues: reports about interaction flows routed through an ACD queue, virtual-queue, interaction queue, workbin, and queue-group objects
- Customize reports

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Workforce Management

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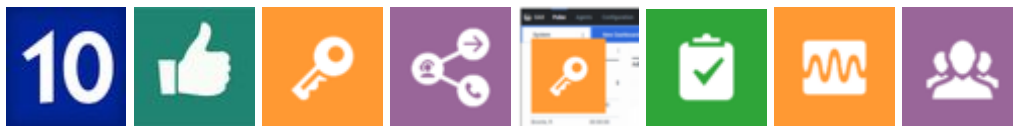
- Monitor contact center performance

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Executive 101

Just getting started with Pure Engage Cloud? Let's start with what an executive might need to know. Feel free to work through the First 10, try some of the Most popular tasks, or browse Learning by app to find specific tasks you want to learn.

First 10

Learn these tasks to get you up to speed.

1. Understand skills and skills-based routing

2. Understand teams/agent groups

3. Get started for Administrators

4. Use your virtual contact center

5. Introduction to Genesys Designer to implement self-service and assisted-service routing (+video) (login required)

6. Monitoring the contact center performance through real-time reporting

7. Generate historical reports/quick tour (+video)

8. Read historical reports (understanding what is happening in my contact center)

9. Generate and read IVR (GVP) reports

Most popular

Executives rely on these topics most often.

1. Get started for Administrators

2. Understand skills and skills-based routing

3. Introduction to Genesys Designer to implement self-service and assisted-service routing (+video) (login required)

4. Read historical reports (understanding what is happening in my contact center)

Learning by app

Here's a more complete list of learning topics to get you started, organized by application.

Platform Administration

You perform general platform administration tasks within the Platform Administration application.

- Get started
- Understand skills and skills-based routing
- Understand teams/agent groups

Designer

- Introduction to Genesys Designer to implement self-service and assisted service routing (+video) (login required)

Real-time Reporting

You track what's happening at your contact center in real-time using the Genesys Pulse tab within the Platform Administration application.

- Monitor the contact center performance through real-time reporting
- Understand real-time reports

Historical Reporting

You access historical reports within the Reporting application that leverages Genesys Interactive Insights.

- Read historical reports (understanding what is happening in my contact center)

IVR Administration

You access IVR (Interactive Voice Response) reports and set filters through the IVR Administration application.

- Generate and read IVR (GVP) reports

Workforce Management

You can monitor your contact center workforce using the Workforce Management application.

- Monitor contact center performance

Contact us

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