



# **Genesys Cloud Echopass Platform User Guide**

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## 1 Revision History

Name	Date	Modification
Christopher Morley	12.10.13	General editing; Version 1
Christopher Morley	2.22.14	Preliminary Revisions; Version 1a

## 2 Genesys Cloud Echopass Platform Service Overview

### 2.1.1 About this User Guide

This User Guide describes the elements of the Service that are available for order. Only elements specified on a Service Order will be made available to any individual Customer as indicated on the Services Order. Terms not defined in this User Guide shall have the meanings set forth in the Master Subscription Agreement (“Agreement”), schedule, addenda, exhibits, attachment, and Services Order, and SOW

Echopass Platform updates and upgrades are included in the monthly subscription fee.

### 2.1.2 Basic and Optional Service Elements: Overview

Genesys’ cloud architecture leverages the SIP-based Contact Center and Genesys Voice Portal (GVP)/Media Services products at the Services’ core and is offered on a Subscription basis. Usage-based aspects of the Service can be Provisioned to meet the needs of Customers, whether they have a large number of Users, have need of on-premises integration with the Service, or require enhanced routing and reporting. Built on Genesys’ universal queuing and routing features, the Genesys suite of standard capabilities will support blended User metrics, including blending inbound with outbound, blending one or both with E-Services, or a number of other combinations. Rounding out the portfolio is a set of optional features to help Customers optimize their contact centers, including call recording, workforce management, as well as differentiated features like EchoCallback or Intelligent Workload Distribution (iWD).

### 2.1.3 Routing and Administration

Using a browser based Service interface, qualified Users, i.e., Administrators can control both routing strategies installed at the time of Provisioning, and Provision and manage User accounts and Service features. Included with the Service are:

- Inbound Voice Routing - Provides for intelligent routing of calls utilizing network information and IVR input with customizable routing strategies informed by: User skills, service level objectives, time of day/day of week/holiday schedules, business conditions or customer data.
- Multimedia Routing - Provides for intelligent routing of eservices and work items utilizing attached data and user input with customizable routing strategies based on: User skills and informed by service level objectives , time of day/day of week/holiday schedules, business conditions or customer data.
- Voice Message Routing - Provides intelligent routing for voice messages using customized routing strategies. Voice messages can be routed based on: User skills, time of day/day of week/holiday schedules, or business conditions. The voice message is presented to the agent as a .wav file using the IP phone and the PC interface for playback controls.
- ACD - Advanced Genesys Automatic Call Distribution (ACD) queuing and routing for single site, multi-site and remote User configurations
- Virtual queuing options include value-based queues, queue-time escalation, play music on hold, play custom announcements
- EchoSystem Manager: Browser-based collection of tools that provides centralized real time end-to-end administration, management and provisioning capabilities for contact center managers to manage the Echopass Platform. ESM allows for the Provisioning of new Users,

management of existing User accounts, control of access to Echopass Platform applications, creation of workgroups and account assignments, and management of the various settings for Echopass Platform applications. ESM tools include:

- EchoAdmin: EchoAdmin provides single entry (single screen interface) creation and administration of User accounts across all contact center technologies.
- Utilities: These are tools that centralize many of the tasks required to manage the contact center. For example, it allows for quick password resets and other day-to-day tasks to maximize operations such as unlocking accounts.
- EchoRouting Control: EchoRouting provides “menu and checkbox” context sensitive screens to modify and maintain routing strategies in real time with tools that allow authorized staff to give Administrators, managers and/or supervisors log-in access to Platform management tools

#### **2.1.4 Reporting (Real-time and Historical)**

The Service includes real-time and historical reporting. The Service will support the following reporting data retention requirements:

- 90 days for customer interaction information
- 13 months on line for reports
- reports older than 13 months are archived for storage

Included and optional reporting feature are:

- Genesys CCPulse (Phase 1 PS Implementation)
  - Real-time Reporting provides Administrators with a comprehensive set of real-time contact center and IVR monitoring and reporting capabilities.
- EchoInsite
  - Web- based solution to display real-time contact center statistics, much like a traditional contact center wallboard. Administrators can configure real-time data and display it at the desktop, on supported mobile devices, or integrate the data into existing wallboard solutions.
- InfoMart (Phase 1 Deployment)
  - Reporting solution that provides a structure for collecting contact center analytics data and sorting it to provide insights to business users. Info Mart data is used to create reports, feed analytical applications, or to create executive dashboards.
- EchoReports
  - Provides reporting capabilities, which include standard reports as well as the ability to develop and run custom reports, across all Echopass Platform services —VoIP Services, email and web. Reports can be posted to a secure Web site allowing access from any location using the Internet. Reports can also be scheduled and automatically delivered via email.
- Custom data feeds to BI data warehouse
  - Genesys will replicate, as close as possible, the same format and data as currently provided

by the various outsourcers' switches. Genesys will use the same delivery mechanism as the outsourcers (FTP).

### 2.1.5 Agent Desktop

The Service will provide a web-based Agent Desktop that supports a variety of Customer interaction channels. Using a web-based desktop, the Service can be easily integrated with a defined set of customer relationship management (CRM) or back-office applications via standard Genesys "adapters." The Service can also centralize multiple web applications together through a common interface and facilitate desktop navigation and workflow.

The included and optional agent desktop features are:

- Genesys Agent Desktop (Phase 1 Deployment)
  - Supports inbound and outbound VoIP Services, and multimedia interactions, including chat, collaboration, and e-mail. For voice interactions, Agent Desktop has an embedded soft phone to provide conference, transfer, and hold capabilities, and automatic dialing of outbound VoIP Services calling campaigns. Agent Desktop offers access to resources including Customer contact history, and product information.
- Echocontact (Multi-media Agent User Interface Option)
  - On-screen, CTI-enabled soft phone that gives agents full control over their inbound and outbound communications – including voice, email and web chat sessions. Call control features include: Log-in, Caller ID, Ready/Not Ready, Release, Hold, Transfer, Conference and Direct Dial. QueueView provides an on screen window that allows agents to see number of calls in the queues for which they are qualified to receive calls, in order to provide User visibility to extended wait times.
  - EchoContact is compatible with the following browsers:
    - Microsoft Internet Explorer® 7.x
    - Mozilla® Firefox® 3.x<sup>1</sup>
    - Safari® 5<sup>2</sup>
    - Chrome™ web browser 8<sup>3</sup>

<sup>1</sup>Mozilla® and Firefox® are registered trademarks of the Mozilla Foundation in the U. S. and certain other countries.

<sup>2</sup>Safari® is a trademark of Apple Inc., registered in the U.S. and certain other countries.

<sup>3</sup>Chrome™ is a trademark of Google Inc.

The Service also supports optional 3<sup>rd</sup> party CRM integrations and value-adding agent features:

- CTI Integration to select CRM desktops
- EchoInsite for Users
  - Web- based solution to display real-time contact center statistics to an authorized User authorized by Administrators.
- EchoScripting
  - On-screen agent tool designed to prompt Users through inbound or outbound call scripts. Supports logical branching and allows information captured during the call to be

saved and passed onto third-party CRM applications (Optional Feature – out of scope for initial implementation)

### 2.1.6 E-Services Features and Options

The Service provides a set of E-Service capabilities designed to support email, chat, fax, and web callback. A set of web-based interfaces allows Users to easily configure how interactions should be managed. Examples include performing basic categorization based on caller profile and standard text analysis on message content. For the email option, Administrators can configure auto-acknowledgement messages and auto-responses. The Genesys Agent Desktop provides User access to a set of standard responses for all interaction types to respond to caller inquiries.

- Web Callback
  - Application that interacts with an Echopass Platform API enabled Customer website form to allow website visitors to request a callback. Based on the website input and request, a pre-designed web form is routed to the Service and Echopass Platform Intelligent Routing automatically schedules the call. Users may re-schedule calls if not completed due to busy, no answer or if the call is answered but the person who scheduled the call is unavailable.
- Web Chat
  - Echopass Platform Web Chat interacts with an Echopass Platform API enabled Customer website form to allow website visitors to interact using chat. Based on the website input and request, a pre-designed web form is routed to the Service, Intelligent Routing automatically delivers the chat an agent with the designated skill level and availability to engage with the end Customer's chat request.
- Email Management
  - Echopass Platform Email Management is integrated with the Echopass Platform intelligent routing platform to utilize business rules, data assignments, and real time User selection criteria in order to route the email to a User or for acknowledgement or auto reply.
- Fax
  - Echopass Platform enables the intelligent routing of inbound fax documents received as digital .tiff files from corporate fax servers, or fax image files attached to email messages from third-party online fax solutions.

### 2.1.7 Workforce Management Option

The Service delivers a comprehensive workforce management (WFM) solution allowing forecasting, scheduling, adherence, and other standard administrative tasks. WFM includes a set of pre-built contracts, shifts, and breaks.

- **Workforce Management** is natively integrated with the Echopass Platform and utilizes the User information entered in EchoSystem Manager as well as system data such as response times by day or timeframe. Workforce Management uses this data to optimize schedules for multi-skilled users who may handle customer interactions of different media types. Workforce Management is used primarily in five areas: Forecasting, Scheduling, Adherence, Workforce Reporting and Employee Empowerment Functionality.

Genesys also supports integration of third-party WFM systems through standard Genesys adapters.

- Historical and adherence data feed for 3<sup>rd</sup> Party WFM (IEX, Verint)
- Genesys PS will optionally deploy and configure WFM connector / media information gateway to provide the necessary information to the workforce management system deployed at the Customer's premises.

### 2.1.8 Intelligent Workload Distribution Option

Based on Genesys Intelligent Workload Distribution (iWD), the Echopass Platform can optionally support workflow management services on a multimedia basis.

EchoWorkflow (Genesys intelligent Workload Distribution). Application for dynamically prioritizing the distribution of work tasks to the people designated as best suited to handle the work task.

EchoWorkflow prioritizes work tasks based on their business value and uses the Echopass intelligent routing platform to distribute/ push work tasks to the resource designated as best skilled to handle them.

### 2.1.9 Interactive Voice Response Platform Services

Based on Genesys Voice Platform (GVP) the Echopass Platform delivers self-service IVR capabilities and optional add-on features.

- Genesys Studio (Phase 1 PS Implementation)
  - IVR applications development tool with graphical user interface (GUI) for the development of VoIP Services applications using Voice Extensible Markup Language (VoiceXML).
- IVR Builder
  - Web based tool providing capability for building IVR call flows.
- EchoSurvey Tool
  - Web-based application for creating, managing and publishing custom IVR surveys, such as a service survey offered after a User-assisted call. Completed surveys are stored within the Echopass System and available for historical reports and analysis, or can be presented to agents promptly for feedback and evaluation.
- IVR Platform (Genesys Voice Platform)



- Interactive Voice Response Platform providing for call handling through the enablement and operation of touch tone and speech enabled self service applications. Gives callers the option to serve themselves by accessing a customer database via DTMF commands or speech.
- IVR Self Service Applications
  - Design and implementation of self service applications that allow Customers to interact with the platform by touchtone or by speech recognition by which they can service their own inquiries by following the IVR dialogue. Development of prerecorded or dynamically generated audio to facilitate and direct users on how to proceed. Tuning IVR applications for caller handling and enhancing the customer experience.
- EchoCallback
  - Application allows Customers to accept a callback at a system-estimated time rather than waiting in queue. EchoCallback runs in the background, continually calculating wait time based on calls in queue, number of Users, average handle time and other contact center factors included in an advanced algorithm that enables highly accurate estimates of wait time. The Echopass Customers set their own wait time threshold.

#### **2.1.10 Optional Integration Services**

Leveraging a Genesys PS engagement and Genesys' library of T-Servers and adapters, the Echopass Platform can optionally integrate with leading ACD and wallboard system vendors.

#### **2.1.11 Optional Agent Efficiency/Effectiveness Features**

The Echopass Platform offers the following optional features:

- Outbound Campaign Management and Dialer (Genesys Outbound)
  - Preview and Progressive and Predictive options for automated dialing are available: Preview allows the Users to view the list record prior to initiating the outbound call. Progressive automatically places the call for the next available User and presents the list record simultaneously. Both options include Outbound Manager, a campaign and list management tool.
- Knowledge Auto Response Library
  - Designed to hold a company's knowledge based articles and provide a publishing process to make this knowledge available as knowledge articles and standard response library entries for email and/or chat agents. Echoknowledge is also the administrative tool used to add to, edit and delete knowledge based articles.