# vCX360 Cloud CX Dashboard

Version 2.0

User Guide

# Contents

# Document Control

A. Revision History:

| Date (dd/mm/yyyy) | Revision | Description of Changes |
|---|---|---|
| **16/11/2021** | 1.0 | Initial Draft |
| **10/04/2022** | 1.1 | Updated the details related to<br>• Company in Admin<br>• License management<br>• Email Templates moved to monitoring module<br>• Various screenshots in dashboard etc |
| **22/11/2022** | 2.0 | |
| | | |
| | | |

B. Reference Documents:

| Document Title | Version | Location |
|---|---|---|
| SRS Document | Initial Draft | Genesys Cloud Monitoring Application - Requirements - v1.1 |

# 1 Introduction

vCX360 Cloud CX Dashboard is part of vCX360 suite providing 360° Customer experience . This solution has Billing Dashboard to provide insights into Billing charges and how we could potentially save when overage charges set in. This application can also be used to monitor some aspects of the cloud implementations available on the Genesys cloud platform.

This application is a web-based solution for viewing Billing Dashboard and for provisioning that is essential as part of monitoring. These operations can be performed respective to the modules in this application.

There are three major modules in this product.

i. **Administration (includes Authorization & Authentication)**

   Authentication module in this application allows to support LDAP or Active Directory based authentication. If clients have publicly visible Active Directory (on the internet), user can perform authentication against that instance of active directory if preferred.

   Authorization allows the users to configure enabled features and their associated permissions.

ii. **Billing Dashboard**

   This module provides valuable insights into different billing charges, charts that show how close are we to pre-purchased limits based on current usage and trending charts on billing charges.

iii. **Monitoring (includes Alerts)**

   This module provides support for monitoring of certain aspects of a Genesys Organization. Alarms can be raised based on the rules configured and currently the application supports showing app-based notification and sending email notification respectively. A user can create multiple rules.

This application provisions operations related to Authorization aspects and Monitoring Alerts aspects. The specific functionalities of these operations will be detailed in the following pages.

The objective of this User Guide document is to explain the use of this web browser-based user interface application. This guide provides information about how to provision and administer all modules in this application.

## 1.1 Purpose & Scope

vCX360 Cloud CX dashboard application is a user interface intended for users to provide insights and monitor multiple cloud implementations on metrics of certain entities, rather than monitoring manually.

## 1.2 Browser Requirements and Compatibility

This web application is compatible with major browsers such as Microsoft Edge, Google Chrome.

## 1.3 Technical Requirements and Assumptions

The following requirements are necessary for the system to run this application:

- Microsoft Windows® Servers
- MS SQL Server 2016
- IIS 8.0 or above
- Chrome Browser

# 2 Overview

This section helps in understanding the use of the application, starting with how to Login. It provides an overview of the various modules and views, the elements contained within, and how they are used.

## 2.1 Login Screen

To work with this application, the user needs to login to the system with the domain username and password that is defined specifically for the user by **Administrator** of the portal. After entering the username, user needs to **Tab** out and enter the password.

Upon log in, the application automatically checks the roles and permissions that are assigned to the logged-in user account. The role determines what functions and features are accessible to the user. Only the items for which the logged-in user has permissions to view are displayed in the interface.

To log into the application, follow the steps mentioned below:

I. In a browser, navigate to the vCX360 Cloud CX dashboard application URL address given for that specific environment. The login page appears as below.

II. Enter username along with domain name. Example johndoe@xyz.com or xyz.com\johndoe

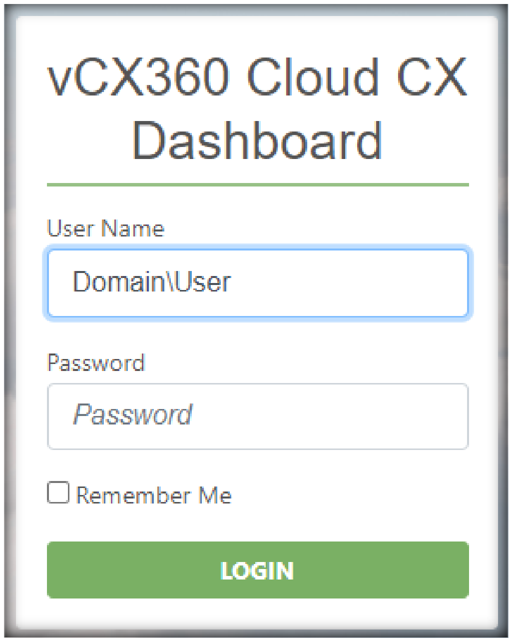



FIGURE: LOGIN PAGE

If the login credentials are incorrect, the system displays an error message 'The username is incorrect (or the user is not configured) '. The user needs to recheck the credentials. If the same problem persists, the user needs to check with the Administrator.

## 2.2 Landing Page

The vCX360 Cloud CX dashboard interface is divided into multiple screens from which user can access all the system's functions.

After successful login, the user will be presented with the following screen choices based on the role and permissions. Below is the dynamic navigation for Super Admin.

All the modules are listed in the left navigation panel. The items displayed in the left navigation panel are expandable and collapsible menu items. The modules are mentioned below:

I. **Administration** – This module contains Companies, Domains, OAuth Clients, Organizations, Users and Email Templates.

II. **Dashboards** – This module contains All Org Summary and Details by Org.

III. **Monitoring** – This contains Monitoring Rules, Raised Alarms and Schedulers Status.

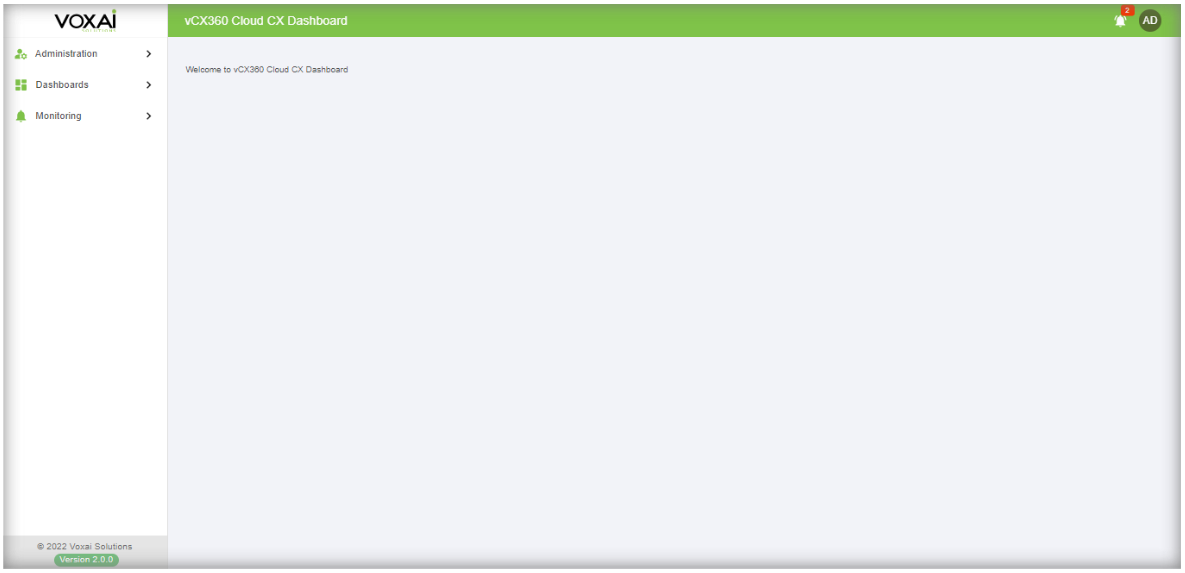



FIGURE: LANDING PAGE

**Note:** *This application is also capable of showing an alert of deployment maintenance time, once in a day upon login. This must be configured in the backend.*

## 2.3 Logout

On the top right corner of the screen, an icon with the user profile image is displayed. If there is no profile image set, then the initial letter of the username is displayed as shown below. When the user clicks on this icon, a pop-up is displayed with options like

- Change Password
- Help
- Logout

When the user clicks on Logout button, the user is logged out of the application and gets redirected back to the login page to start the session again.

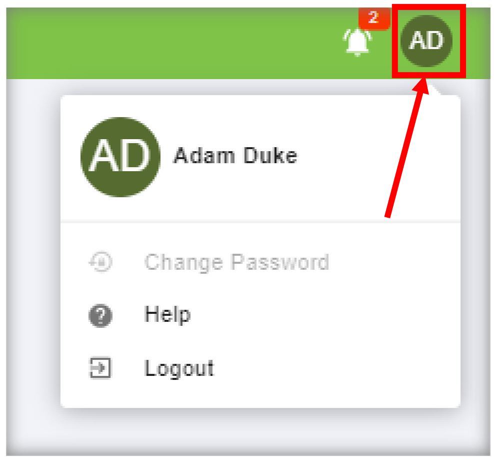



FIGURE: SIGN-OFF BUTTON IN HOME SCREEN

Change Password option is available when the user logs in for the first time to update the password.

When clicked on Help, the user will be re-directed to product documentation page.

## 2.4 Layout

The user interface is presented as an Overview of vCX360 Cloud CX dashboard application.

**Menus** - All the major actions related to Administration, Dashboards and Monitoring are shown in the form of Menu items in the left navigation panel of the screen.

**Submenus -** Actions related to a menu item are displayed in a hierarchical order, under Menu item as shown in below screenshot. Consider a menu item Administration, it contains sub menus items Domains, OAuth Clients, Organizations, Email Templates and Users.

Consider a main menu item as Feature/Module (Administration/Dashboards/Monitoring).

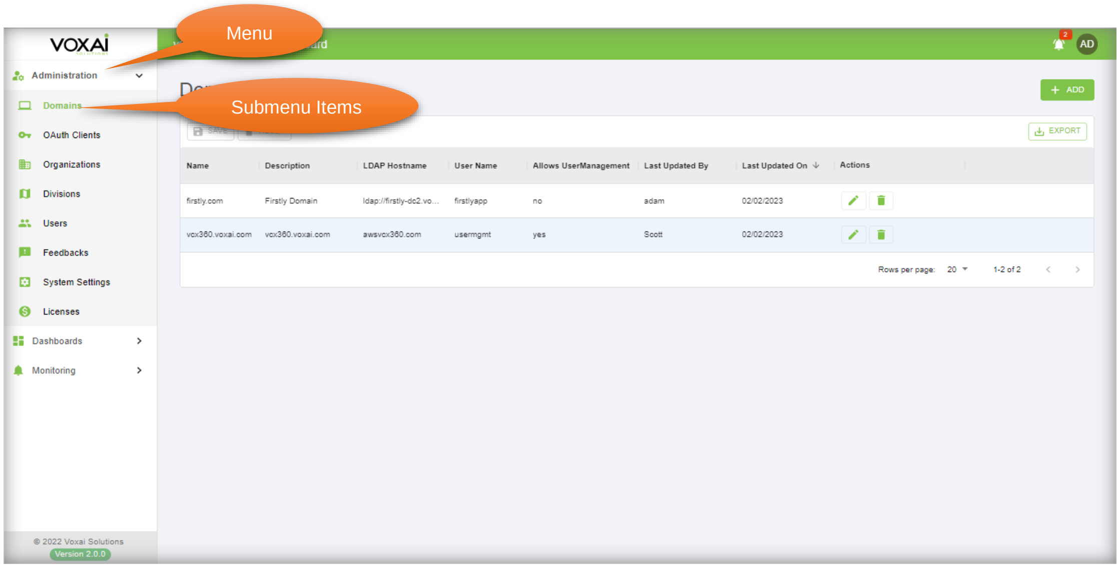



FIGURE: APPLICATION LAYOUT

### 2.4.1 Tabular View

On Clicking any submenu in the left navigation panel of this application, respective details of the sub menu item are displayed in a tabular view on the right-side panel of the application.

In the tabular view displayed, below is the list of icons and buttons available:

- Add button (**+ Add** on top of the table)
- Icons displayed on each row
  - View (this will only show up if the user has view permission for a specific module. If user has Edit/Full permission, this icon is hidden)
  - Edit
  - Delete
  - Clone ( icon is only applicable in Monitoring-Monitoring Rule's screen)
  - Validate ( icon is only applicable in Administration-Organization screen)
- SAVE Button
  - This button allows the user to save the preference related to ordering or reordering of the columns in the tabular view.
- RESET Button
  - This button allows the user to reset the updated preferences to the default order of the columns in the tabular view.
- EXPORT Button

- This button allows the user to download the data displayed in the tabular view as a PDF document as well as an option to set the print preferences to print the details.

**Note**: By default, SAVE and RESET buttons are disabled. They are enabled only when the position of any columns in the tabular view is changed.

This tabular view has multiple operations that can be performed at the column level. Each Column can be re-ordered, also can be pinned to the left most or right most position in the tabular view, and the preference can be saved. On each column, we have an option to Sort column values (if enabled) and menu options. Icons for Sorting and Menu Options are displayed when hovered over any Column in the tabular view.

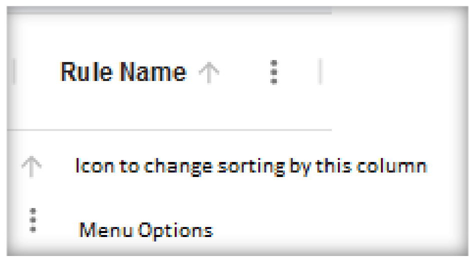



FIGURE: ICONS DISPLAYED WHEN HOVERED ON THE COLUMN

Below is the list of available options that can be implied on a column:

**Unsort** – By default the details in the tabular view are unsorted.
**Sort by ASC** – Allows the user to sort column data in ascending order.
**Sort by DESC** – Allows the user to sort column data in descending order.
**Hide –** Allows the user to hide a specific column from the view. Given different screens have lot of information to present, it may lead to visibility of horizontal scroll bar.
**Filter** – Allows the user to filter column data based on available operators and values. Below is the screenshot of the Filter pop-up.

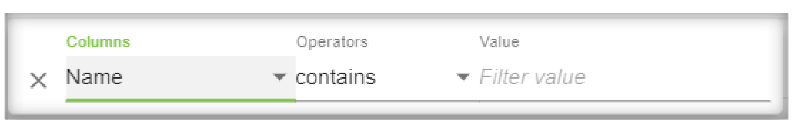



FIGURE: FILTER POPUP

**Show columns –** Allows the user to unhide columns. Also allows the use to hide multiple columns at once with the help of toggle buttons. Below is the screenshot of the pop-up:

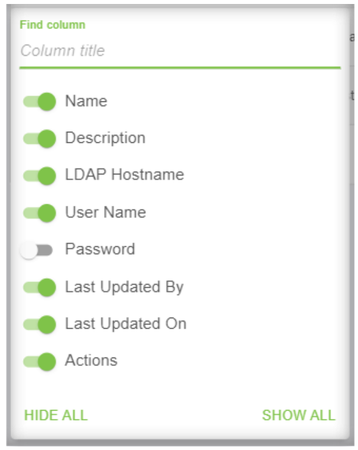



FIGURE: SHOW COLUMNS POPUP

# 3 Administration

Administration is a module that appears as a menu item in the left navigational panel. This menu option allows the user to define necessary configurations like Domains, Companies, OAuth Clients, Organizations, Users and Email templates.

Companies, Domain, OAuth clients, Users, and Licenses are visible only to users with Super Admin role.

## 3.1 Domains

This sub menu option allows the user to define Domain. This application delegates the Authentication to an Active Directory or LDAP. For Authentication purposes, the users can open their Active Directory to integrate this application. By Default, the solution has an internal Active Directory available to support the authentication where new users can be set up by Administrators.

A user created in the system is always linked to a domain. A domain is defined based on the details like

**Name**: Domain Name
**Description**: Domain description
**LDAP Host name**: URL of Host name
**Username**: Username for connecting to Active Directory if applicable
**Password**: Password for connecting to Active Directory if applicable
**Allows User Management**: Enabling this button allows adding a new user for a particular domain. This toggle button impacts the search of domain user while adding a new user.

On clicking the sub menu item Domains in the left navigation panel, a tabular view with all the existing domains is displayed on the right panel. Each row of the tabular view allows the user to edit or delete a domain using the icons respectively.

On the top right corner of the list, a '**Add'** button exists. This button allows the user to add a new domain. When a user clicks on the add button, a pop-up to enter the details appears. After entering the details, save the data by clicking the **Create** button or cancel by clicking the cross '**x**' icon or **Cancel** button as shown in the screen below.

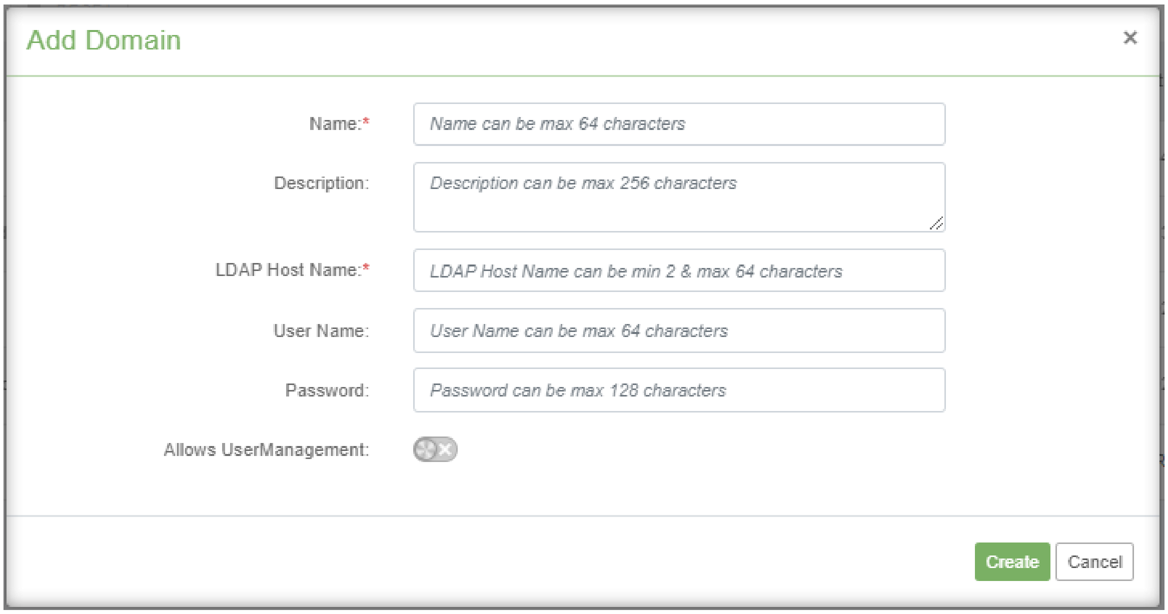



**FIGURE: ADDING A DOMAIN**

Edit icon on each row of the tabular view, allows the user to edit domain details of an existing domain.

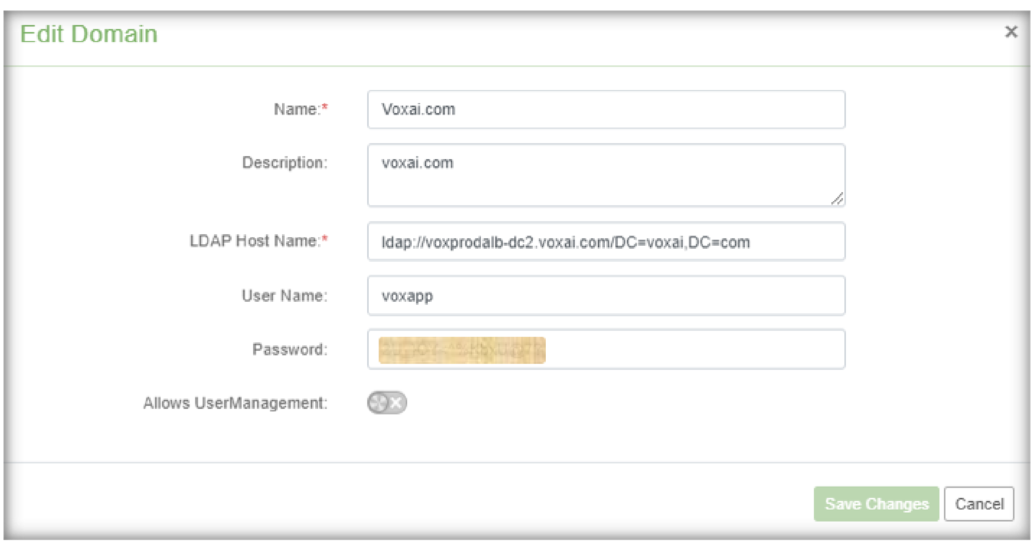



**FIGURE: EDITING A DOMAIN**

To delete a domain, click on the **Delete** icon. It will display a pop-up for delete confirmation, as shown in the below.


FIGURE: DELETING A DOMAIN

## 3.2 OAuth Clients

This sub menu option allows the user to define an OAuth Client. Below screen depicts the list of OAuth clients viewed when this sub menu option is selected. For retrieving data for any Genesys Organization, the application needs OAuthClient credentials to pull data from Genesys using their public APIs. These are synonymous to Username/Password for applications.

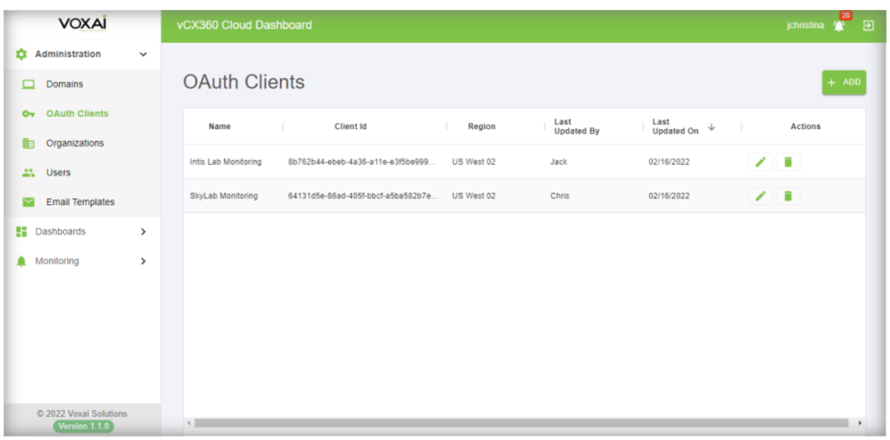



FIGURE: OAUTH CLIENTS LIST VIEW

An OAuth client is defined based on the details like

**Name**: OAuth Name
**Client ID**: OAuth client Id (Refer 3.2.1 Section)
**Secret**: Password
**Region**: Region to which a specific the Genesys Organization is part of. Like US East 01 / US West 02 etc.

There are 3 toggle buttons(For PairedOrg, For VoxaiOrg, For CreatePair) which are used by Voxai administrators for internal purpose. By default, these fields are toggled to false.

On clicking the sub menu item OAuth Clients in the left navigation panel, a tabular view with all the existing clients is displayed on the right panel. Each row of the tabular view allows the user to edit or delete an OAuth Client using the icons respectively.

On the top right corner of the list, a '**Add'** button exists. This button allows the user to add a new OAuth Client. When a user clicks on the add button, a pop-up to enter the details appears. After entering the details, save the data by clicking the **Create** button or cancel by clicking the cross '**x**' icon or **Cancel** button as shown in the screen below.

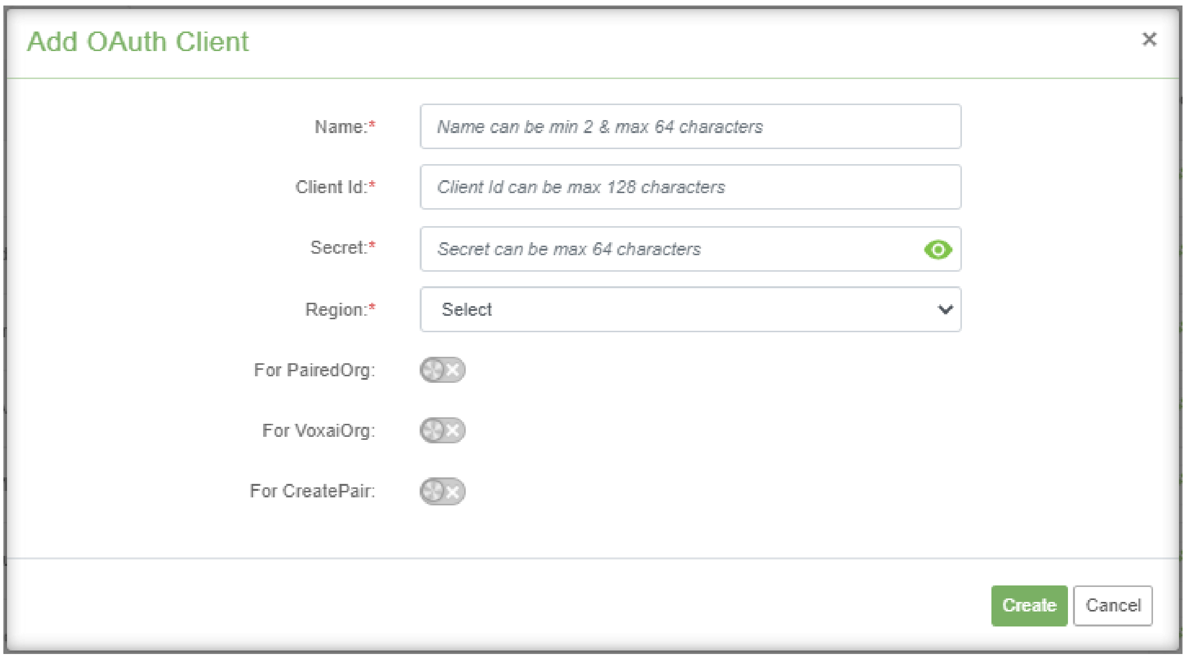



**FIGURE: ADDING AN OAUTH CLIENT**

Edit icon on each row of the tabular view, allows the user to edit OAuth Client details of an existing OAuth client. Below is the screenshot of the pop-up to edit the details when the edit icon is clicked.

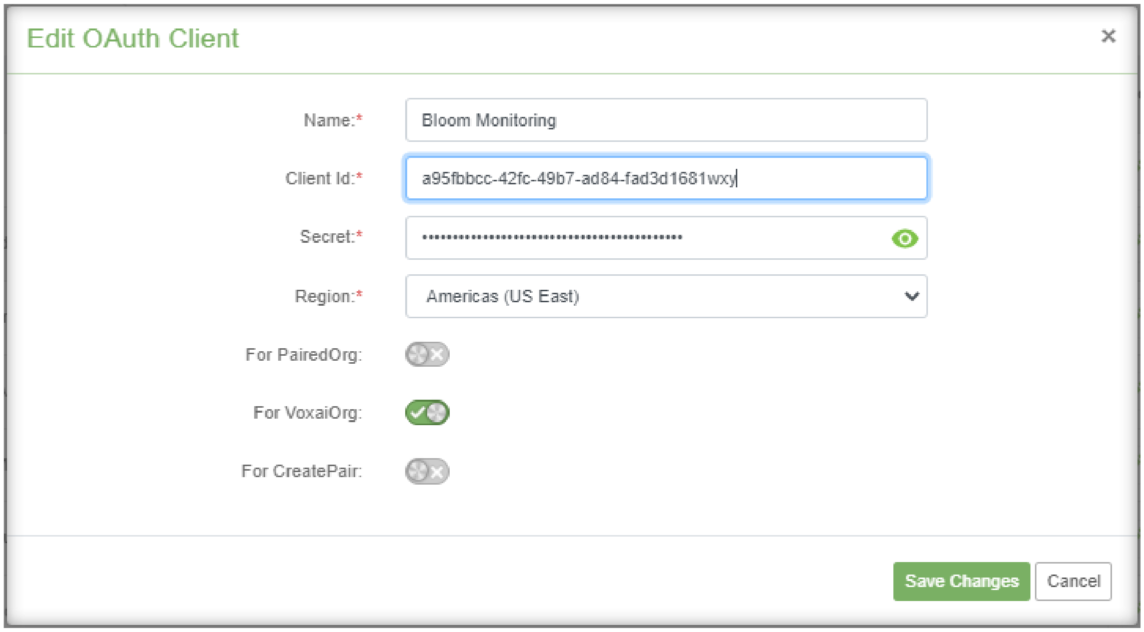



**FIGURE: EDITING AN OAUTH CLIENT**

To delete an existing OAuth client, click on the **Delete** icon. It will display a pop-up for delete confirmation, as shown in the below screenshot.

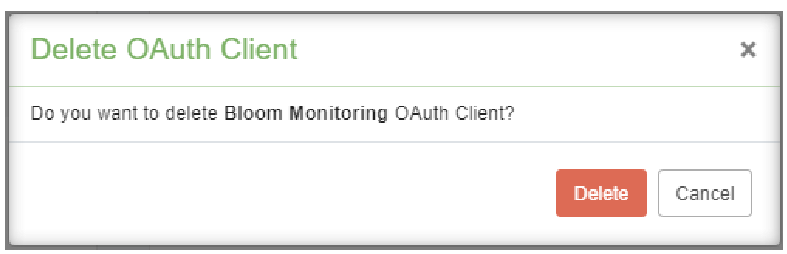



**FIGURE: DELETING AN OAUTH CLIENT**

### 3.2.1 Configuring OAuth client in Genesys cloud

Users can define OAuth client in vCX360 Cloud CX dashboard application only if an OAuth client is created as part of Genesys Organization in Genesys cloud. Client Id and Secret used in the vCX360 cloud CX dashboard application are related to the details generated or created in the Genesys cloud. Only a user with Genesys admin privileges can create an OAuth client in Genesys cloud. Below are the steps to define an OAuth client in Genesys cloud:

- Create a new Role(s) for OAuth Client

- Create OAuth Client
- Two Roles must be created for two different OAuth Clients.
    - One Role and one OAuth Client for querying Monitoring Data
        - This Role must be created under the main Organization.
    - Other Role and other OAuth Client for querying Billing Data
        - This Role must be created under the Partner/Paired Organization.

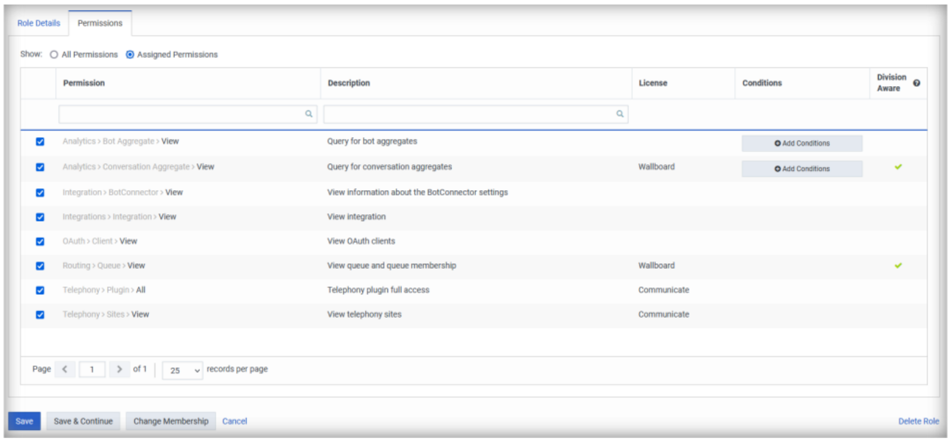
#### 3.2.1.1 Create new Role(s)

Below are the steps to create a new role in Genesys Cloud:

1. Login to Genesys Cloud.
2. Go to the Admin section.
3. Click on Roles/Permissions under **People & Permissions**
4. Please refer to following link for more information
    a. https://help.mypurecloud.com/articles/add-roles/
    b. Below is the list of Permissions that are required for retrieving Monitoring Data ( For example, name of the Role is “CD Monitoring Data”)

| Permission | Description | License |
|---|---|---|
| AffiliateOrganization > clientBilling > view | | |
| Analytics > Agent Conversation Detail > View | Query for an agent's conversation details Cloud CX 3 | |
| Analytics > Bot Aggregate > View | Query for both aggregates | |
| Analytics > Conversation Aggregate > View | Query for Conversation aggregates | Wallboard |
| Authorization > Division > View | View Divisions | |
| Billing > Subscription > View | View subscriptions | |
| Integrations > Integration > View | View integration | |
| Limits > Organization > View | View organization limits and change requests | |
| OAuth > Client > View | View OAuth clients | |
| Routing > Queue > View | View queue and queue membership | Wallboard |
| Telephony > Plugin > All | Telephony plugin full access | Communicate |
| Telephony > Sites > View | View telephony sites Communicate | Communicate |
| UI > myOrganization > View | View directory organization in the UI | |

c. This new role must be assigned to OAuth Client later. To have this new role available in the list of assignable roles, click change membership after the role is created and assign that role to yourself (current logged in user). Then logout and login again before creating OAuth Client.




d. Role for OAuth Client for querying Billing Data

i. This Role must be created under a Paired Organization which is setup to query Trustee Billing Overview.

ii. Please refer the following links for more information

❖ Authorized Organization - [https://help.mypurecloud.com/articles/about-authorized-organizations/](https://help.mypurecloud.com/articles/about-authorized-organizations/) .

e. Below is the list of permissions that are required for querying Billing Data. (For example, name of the Role is “CD Billing Data”)

| Permission | Description | License |
|---|---|---|
| AffiliateOrganization > clientBilling > view | | |
| Billing > Subscription > View | View subscriptions | |
| UI > myOrganization > View | View directory organization in the UI | |

i. This new role must be assigned to OAuth Client later. To have this new role available in the list of assignable roles, click change membership after the role is created and assign that role to yourself (current logged in user). Then logout and login again before creating OAuth Client.

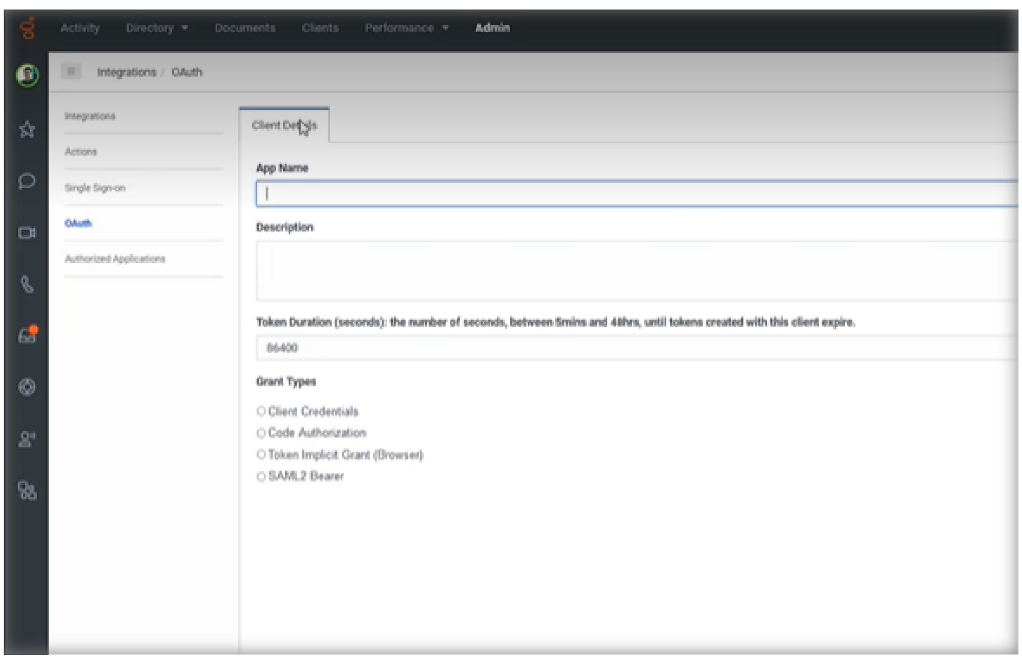
#### 3.2.1.2 Create OAuth Clients

The user must create two OAuth Clients for an Organization.

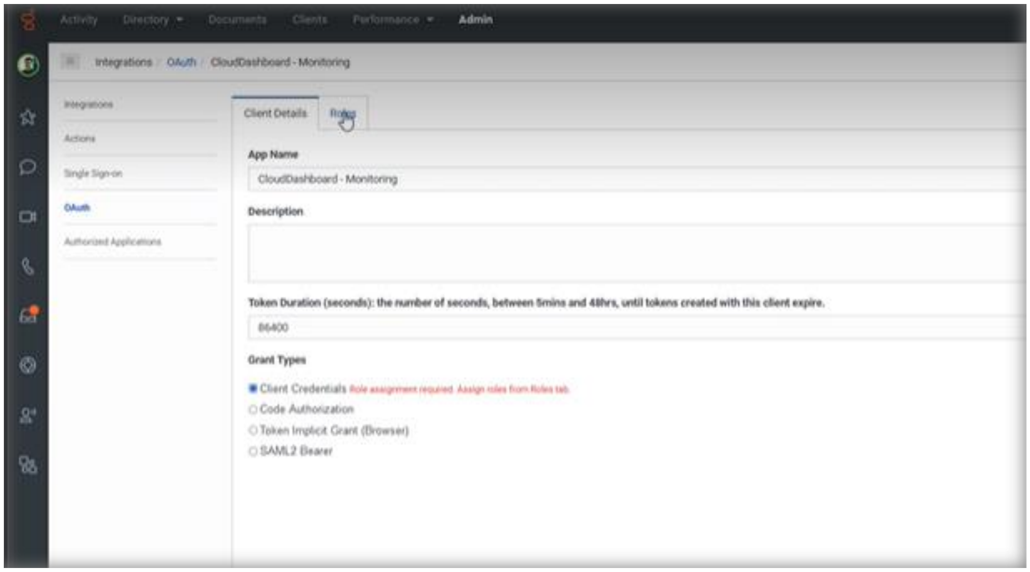
- One under the relevant Organization and this should be used for querying Monitoring Data which includes Non- Billing related data. For this OAuth Client, please associate Role (“CD Monitoring Data”) created in the above section (**3.3.1.1** Create New Role).
- Another one should be created in the Partner/Paired Organization (Authorized Organization). This would be used for retrieving data for Billing Dashboard. For this OAuth Client, please associate Role (“CD Billing Data”) created few steps back.

Below are the steps for creating an OAuth Client in Genesys cloud

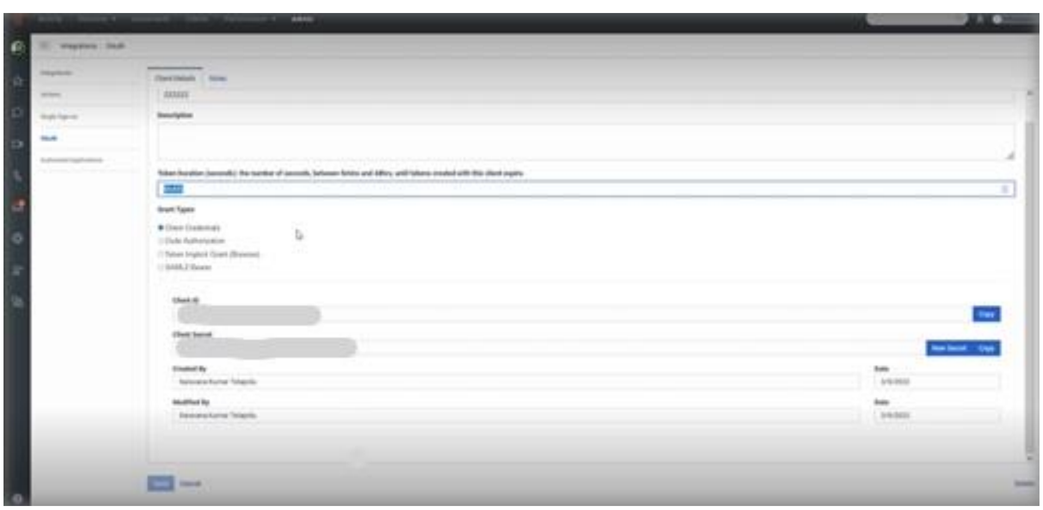
1. Login to Genesys Cloud.
2. Go to the Admin section.
3. Go to OAuth Section.
4. Click on “New Client”. Below is the screenshot of it:




5. Add value for “Token duration” field or can have the default value ”86400”.
6. Select the option “Client credentials” as shown in below screenshot.




7. Go to the Roles tab.
8. Select a particular role.
    a. Two Roles must be already created as per previous section. Select the relevant one here.
    b. If you do not see the Role, make sure the current logged in User has access to this newly created Role (if not please add it to yourself) and then logout/login back. Most likely the newly created Role shall be visible now.
9. Click on “Save”.
10. Client ID and Secret are generated as shown below:



**Note**: Copy this Client Id and Secret and use it while defining an OAuth client in Cloud CX dashboard.

## 3.3 Organizations

This sub menu option allows the user to add an Organization in the solution to enable Dashboard or Monitoring. Below screen depicts the list of existing Organizations viewed when this sub menu option is selected.

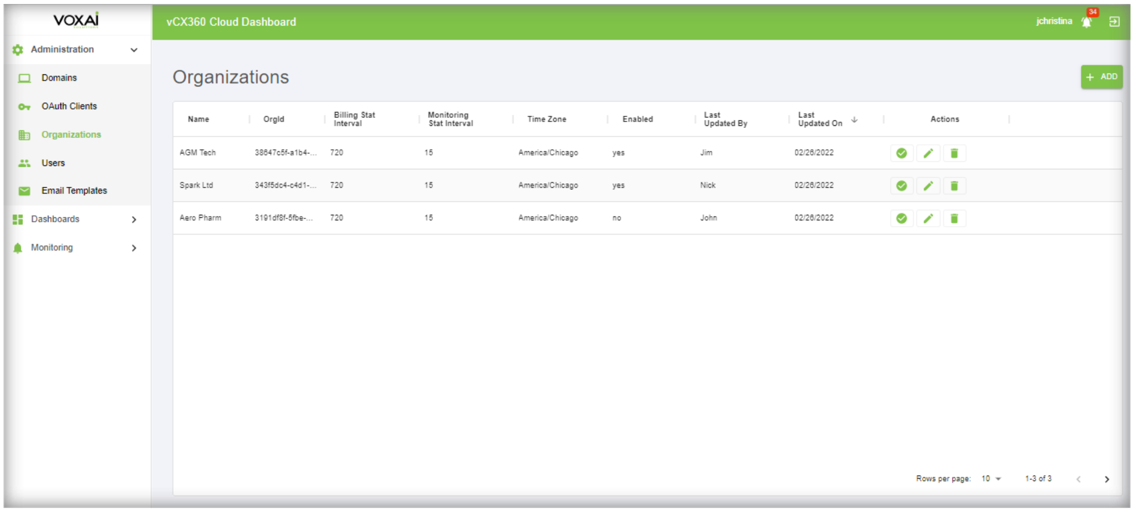


FIGURE: ORGANIZATIONS LIST VIEW

An Organization is defined based on the details like

**Organization Id**: Organization Id

**Organization Name**: Organization name

**Description**: Organization description

**Enabled**: Organization is enabled or disabled. If an organization is disabled, data collection would stop, and monitoring is no longer applicable for that Organization.

**Billing Stats Interval:** This represents the interval in which Billing Stats are retrieved. 1440 indicates once a day, 720 indicates twice a day and so on. 360 is a meaningful number here.

**Monitoring Stats Interval:** This represents the interval at which Data is collected from Genesys and Monitoring Rules are evaluated.

**OAuth Client:** OAuth Client is used for retrieving Monitoring Data.

**Billing OAuth Client: :** OAuth Client is used for retrieving Billing Data.

**Time Zone:** Indicates Time Zone based on location of Company's Head Quarters.

**Dashboard DataPurge AfterDays:** Indicates after how many days the data related to dashboard is deleted from the system.

**Monitoring DataPurge AfterDays:** Indicates after how many days the data related to monitoring is deleted from the system.

**Committed Thresholds:** These thresholds determine colour indications for the Billing Subscription Bar Chart. User must provide the Minimum % for colour yellow and Minimum % for colour Red, in this field.

**Category Totals Thresholds:** These thresholds determine colour indications for Category Totals shown in Dashboard's All Org Summary page. User must provide the Minimum % for colour yellow and Minimum % for colour Red, in this field.

| | | |
|---|---|---|
| \$ | \$ | \$ |

**Monitoring Thresholds:** These thresholds determine colour indications for Rule Indicator in Monitoring Rule's Rule Definitions Listing Page and in Edit Monitoring Rule Expression(s) Tab. User must provide the Minimum % for colour yellow and Minimum % for colour Red, in this field.

The fields below allow the user to define the spending limit by Category for Billing Charges. For example, if user sets IVR to $100, then whenever the current charges for all IVR category is in reach to the spending limit, the colour of $ symbol in Dashboard's All Org Summary is expected to change.

**License**: Spending limit for License Category
**API**: Spending limit for API Category
**Messaging**: Spending limit for Messaging Category
**IVR**: Spending limit for IVR Category
**Storage**: Spending limit for Storage Category
**Device**: Spending limit for Device Category
**Resource**: Spending limit for Resource Category
**Others**: Spending limit for Others Category (which is anything other than the above categories).

Some fields like **Billing OACOrgPair**, **Purchased Source**, **Monitoring OACStatus** and **Billing OACStatus** are used for internal purpose to validate the setup process.

On the top right corner of the list, a '**Add'** button exists. This button allows the user to add a new Organization. When a user clicks on the add button, a pop-up to enter the details appears. After entering the details, save the data by clicking the **Create** button or cancel by clicking the cross '**x**' icon or **Cancel** button as shown in the screen below.

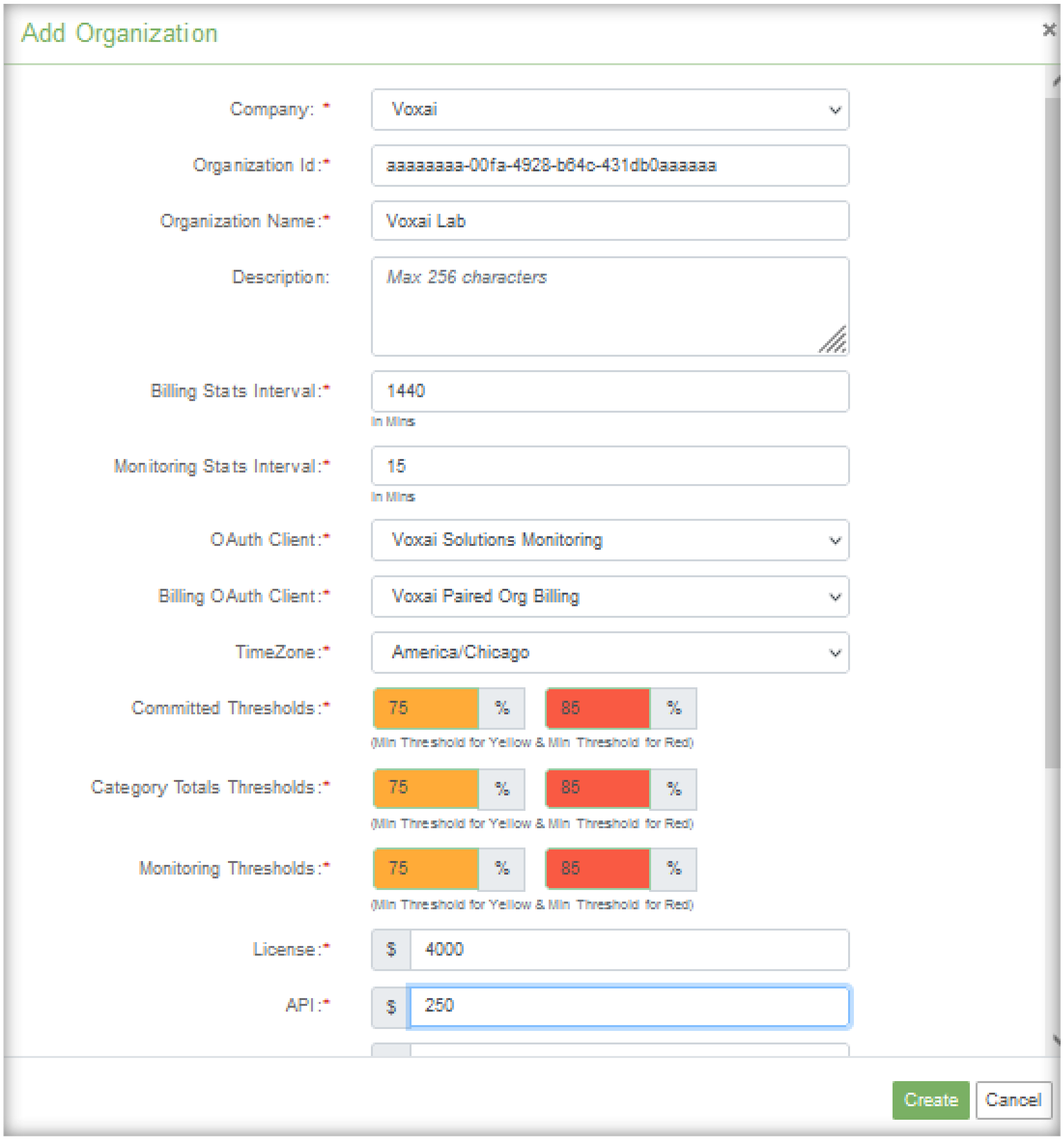



**FIGURE: ADDING A NEW ORGANIZATION**

When a new organization is created, a default email template is created under the Monitoring email templates section. The template name will be mentioned as **Organizationname_Default**.

Edit icon on each row of the tabular view, allows the user to edit domain details of an existing Organization . Below is the screenshot of the pop-up to edit the details when the edit icon is clicked.

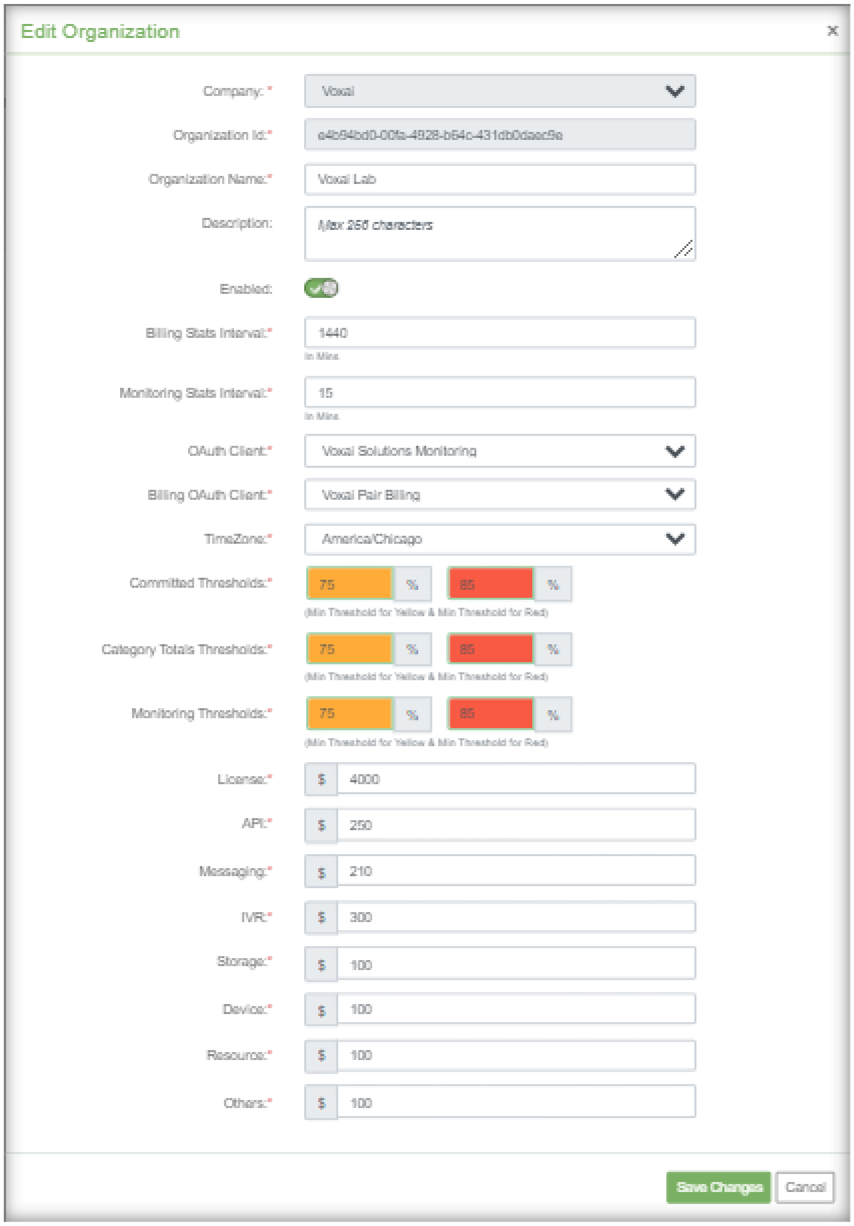



FIGURE: EDITING AN ORGANIZATION

To delete an existing Organization, click on the **Delete** icon. It will display a pop-up for delete confirmation, as shown in the below screenshot.

**Note**: Once an Organization is deleted, all data associated to that Organization including Billing Data, Monitoring Data, Monitoring Rules, Raised Alarms etc will be DELETED PERMANENTLY and there is no Undo action available. User needs to use this option carefully.

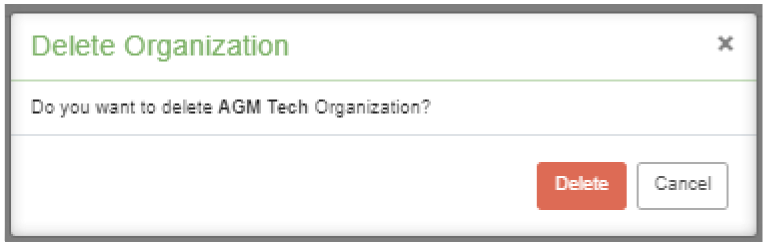



FIGURE: DELETING AN ORGANIZATION

## 3.4 Divisions

This sub menu option allows the user to add a division in the solution to enable Dashboard or Monitoring. A division is entity similar to a business unit. Below screen depicts the list of existing Divisions viewed when this sub menu option is selected.

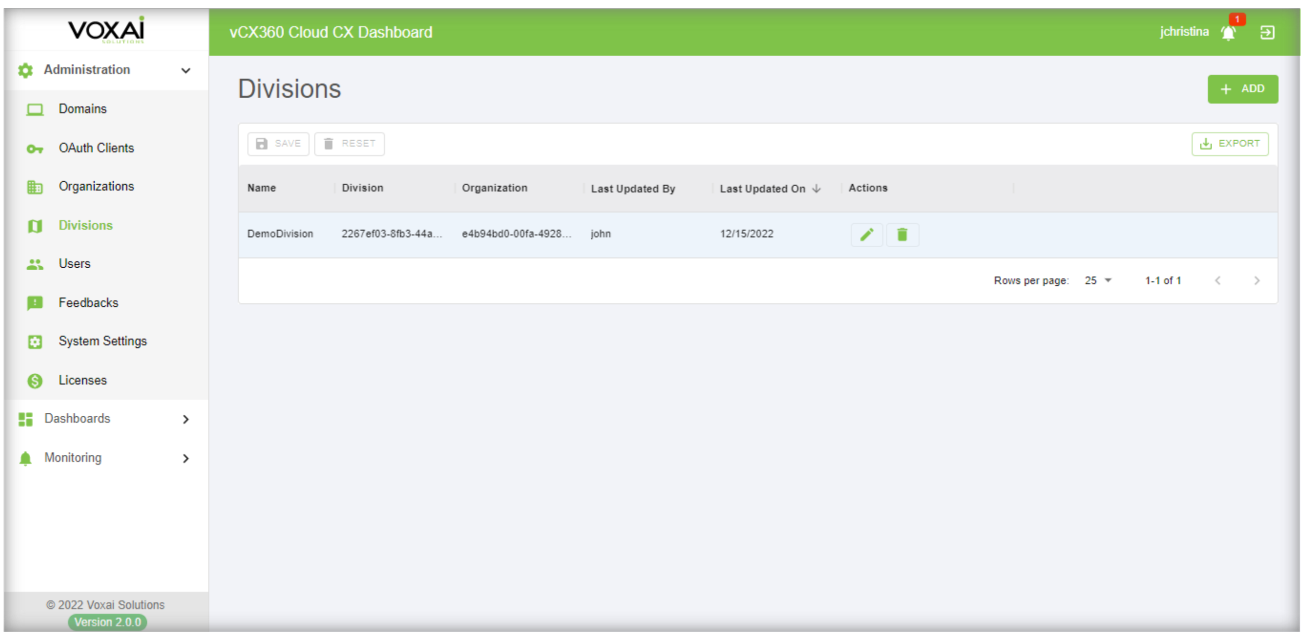



FIGURE: DIVISIONS LIST VIEW

A division created in the system is always linked to an organization. A division is defined based on the details like

**Organization**: List of existing organizations

**Division**: List of divisions existing in genesis for a specific organization

**Division Id**: Id of a division

**Name**: Division name

**Home Division**: This toggle when enabled indicates that respective division is a home division. And when a home division is selected in the Division dropdown then this toggle button is enabled automatically.

On clicking the sub menu item Divisions in the left navigation panel, a tabular view with all the existing divisions is displayed on the right panel. Each row of the tabular view allows the user to edit or delete a division using the icons respectively.

On the top right corner of the list, a ‘**Add’** button exists. This button allows the user to add a new division. When a user clicks on the add button, a pop-up to enter the details appears. After entering the details, save the data by clicking the **Create** button or cancel by clicking the cross ‘**x**’ icon or **Cancel** button as shown in the screen below.

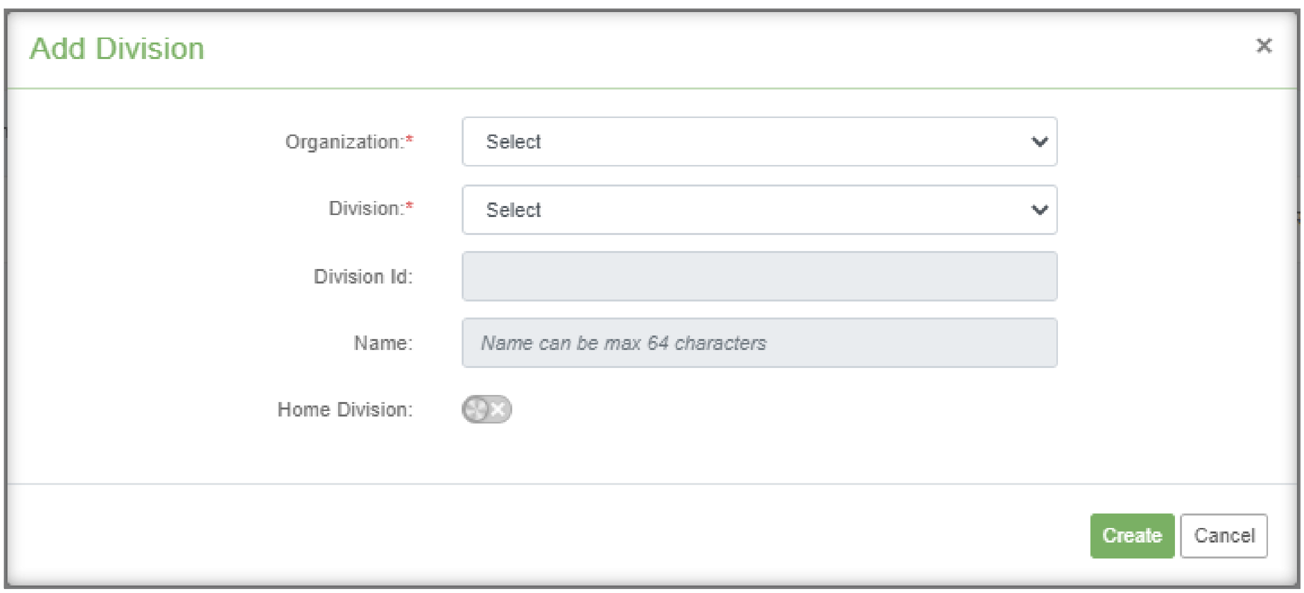
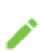



FIGURE: ADDING A NEW DIVISION

Edit icon  on each row of the tabular view, allows the user to edit division details of an existing Organization. Below is the screenshot of the pop-up to edit the details when the edit icon is clicked.

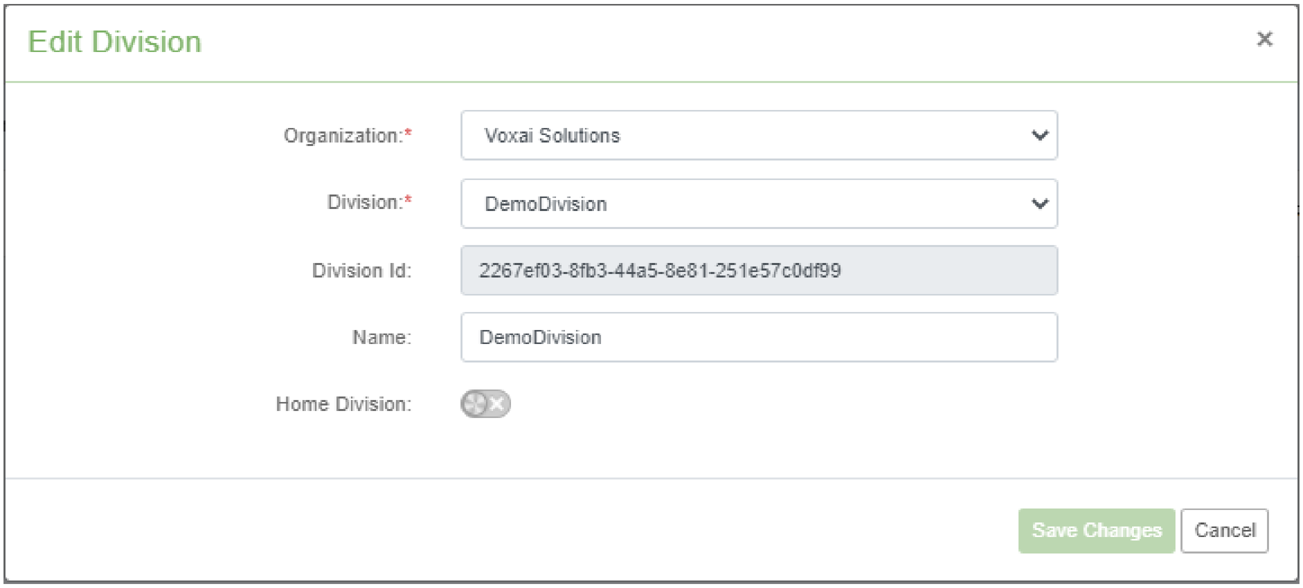



FIGURE: EDITING AN EXISTING DIVISION

To delete an existing division, click on the **Delete** icon. It will display a pop-up for delete confirmation, as shown in the below screenshot.

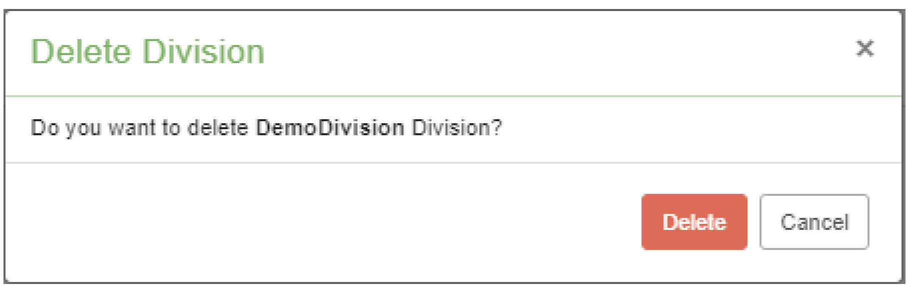



FIGURE: DELETING AN EXISTING DIVISION

## 3.5 Users

This sub menu option allows various operations that can be performed on a user profile. Below screen depicts the list of existing users viewed when this sub menu option is selected.

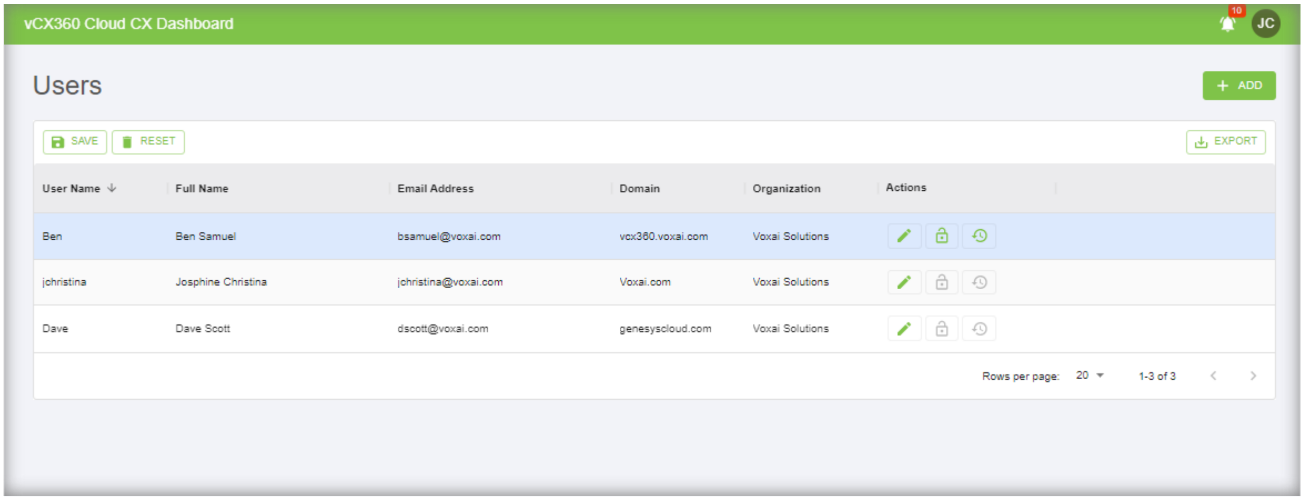



**FIGURE: USERS LIST VIEW**

A user with Admin privileges would have access to Users screen. A user with admin previliges can update the user details, unlock a user or reset a user's password. Reset password icon and unlock user account icon are enabled only when the "Allows User Management" field is enabled for that specific domain. And also all super admins will be able to view the list with enabled unlock account icon and reset password icon.

A user is defined based on the details as mentioned below:

**User Type**:

Indicates the type of user Super Admin, User with permissions etc

- Super Admin
  - User setup as Super Admin has complete privileges for All Modules and all permissions.
- User with Permissions
  - User with Permissions, allow to define what permissions the user is entitled to for different Organization.
    - Modules (indicates Features)
      - Administration Module (not tied to any Organization)
      - Dashboards
      - Monitoring
    - Permissions
      - View – View only privilege
      - Edit – Can perform Add/Edit operations
      - Full – Can perform Add/Edit/Delete operations.

**Domain/Local:**

The authentication for this application is delegated to either to the host the solution is hosted (Windows Server) or an Active Directory. This would mean, a User from either Domain or Local host need to be searched and selected.

- Domain – Domain User
- Local – Local User on the Host. This option is recommended not to be used; this option is available just as a mitigation if needed.

**Search:** Search for a user by typing characters of the First Name (3-4 characters to start).

**Username:** Based on search results, this field is auto populated and cannot be edited.

**Full name:** Based on search results, this field is auto populated and cannot be edited.

**Email:** Provide Email Address**.** (Not used now. For future use)

**Admin Role:** Applicable permissions like View, edit or Full on the Administration module. This is shown in a separate section given these permissions are not tied to any Organization.

**Roles:** Allows the user to provide access to the modules like dashboards, monitoring etc different Organizations (more than one). Also allows the user to apply View, Edit or Full permissions on the selected module and organization. Based on these defined Roles and Permissions, the logged in User would have relevant visibility and permissions.

On the top right corner of the list, a '**Add'** button exists. This button allows the user to add a new User. When a user clicks on the add button, a pop-up to enter the details appears. After entering the details, save the data by clicking the **Create** button or cancel by clicking the cross '**x**' icon or **Cancel** button as shown in the screen below.

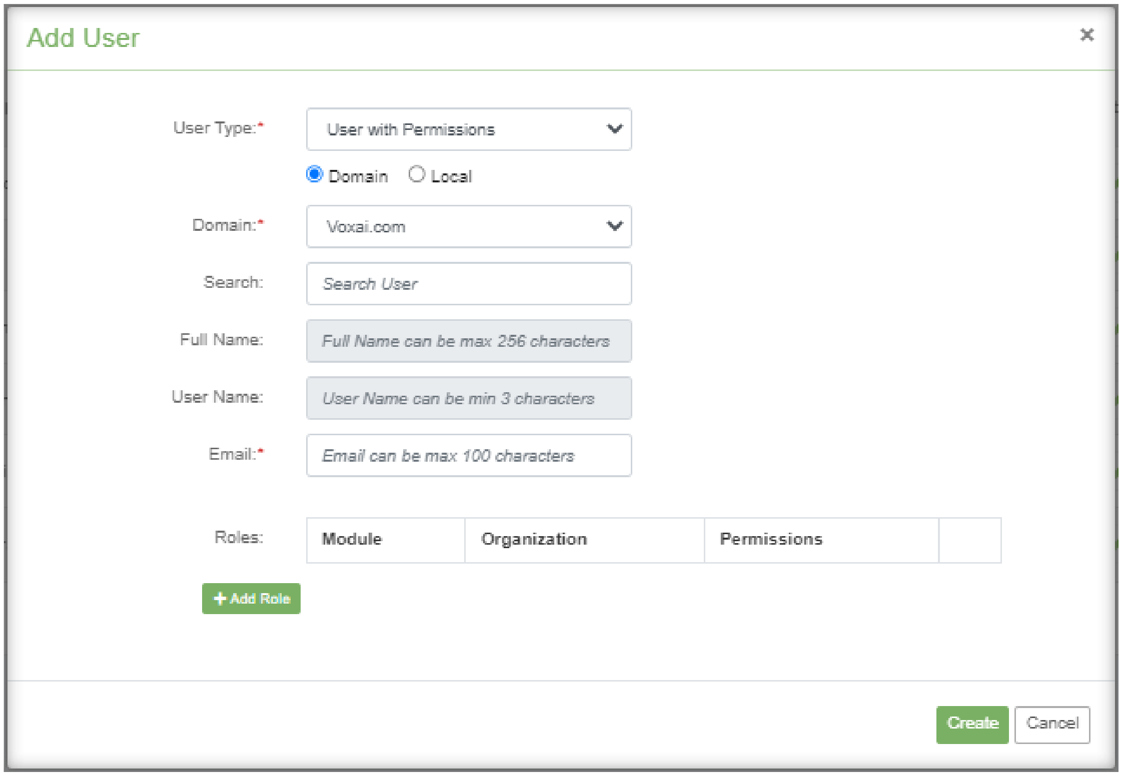



**FIGURE: ADDING A NEW USER**

For the selected domain, if the domain setting "Allow User management" is enabled then a user can be added for that specific domain. Below is the screenshot of the Add User window, when a such domain is selected:

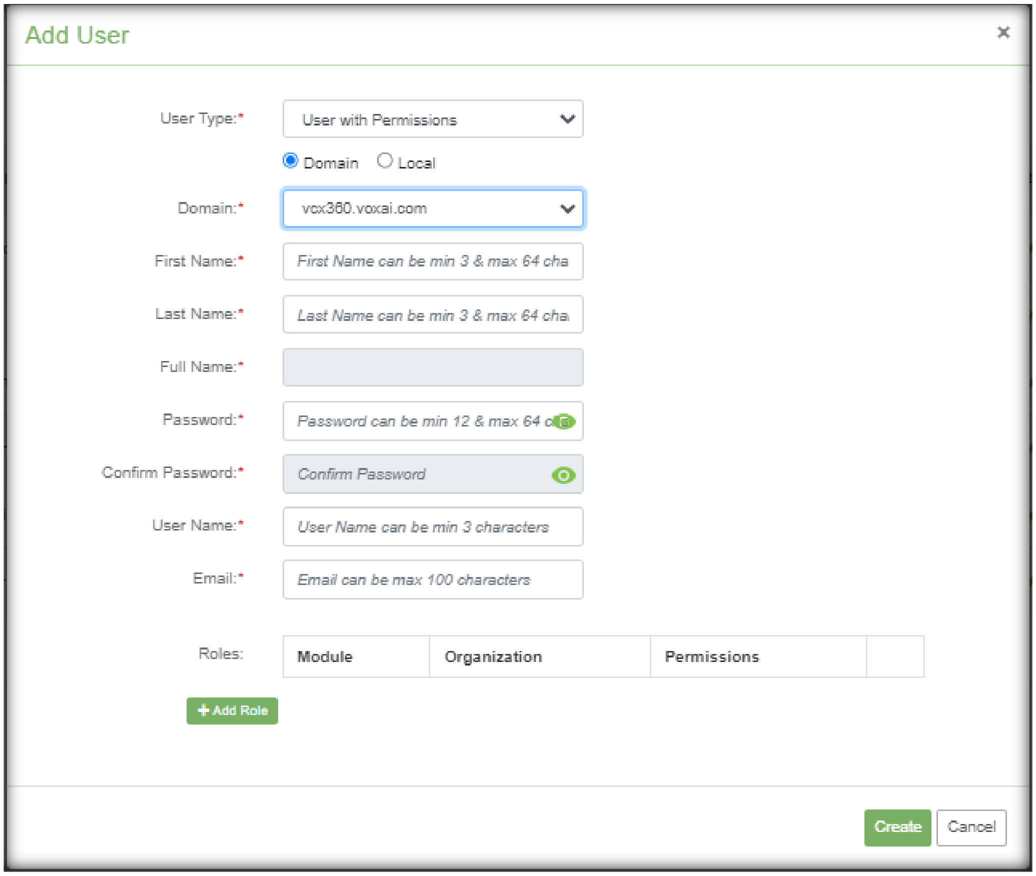



**FIGURE: ADDING A NEW USER (USER MANAGEMENT ENABLED FOR THIS DOMAIN)**

This Add button is enabled only for users with Super Admin role. When a user is created successfully, a popup window to copy the username details along with the web URL to login is displayed, with copy icon button on the top right corner of it, as displayed in the below screenshot:

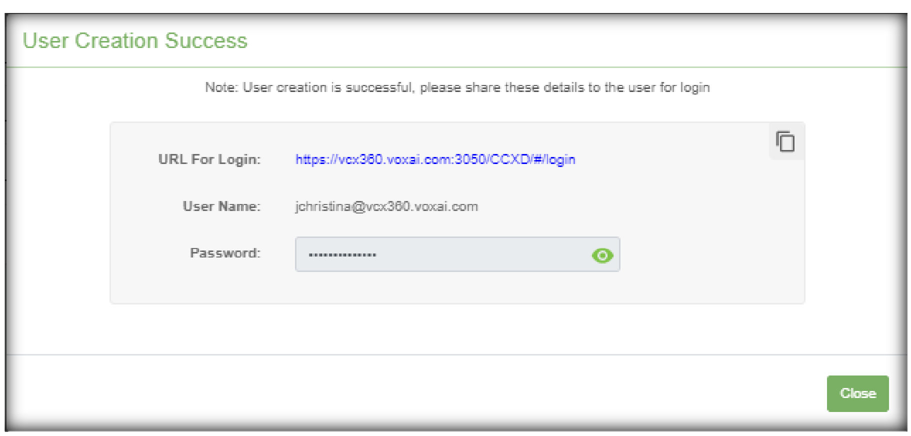



**FIGURE: POPUP TO COPY USER DETAILS**

Edit icon on each row of the tabular view, allows the user to edit user details of an existing User. Users created as Super Admins cannot be modified.

Unlock user account icon allows the user to unlock a locked account. This icon button is enabled only for locked accounts. It is enabled depending on the domain setting “User management” being enabled.

Reset password icon allows the user to reset the password. It is enabled only when the domain setting “User management” is enabled. When clicks on this button, a popup is displayed as mentioned below:

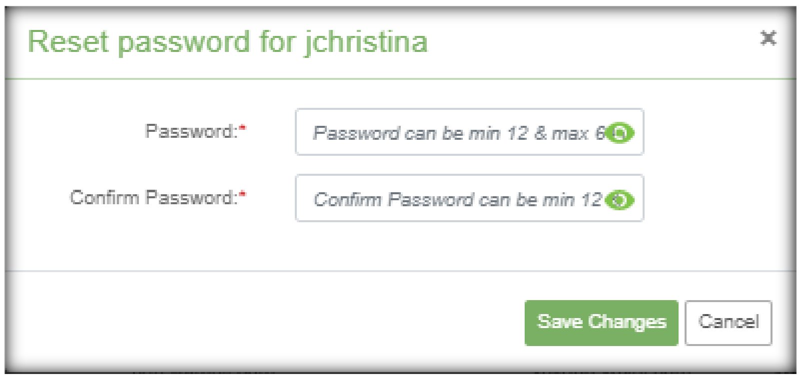



FIGURE: POPUP TO RESET PASSWORD FOR A USER

Below is the screenshot of the pop-up to edit the details when the edit icon is clicked.

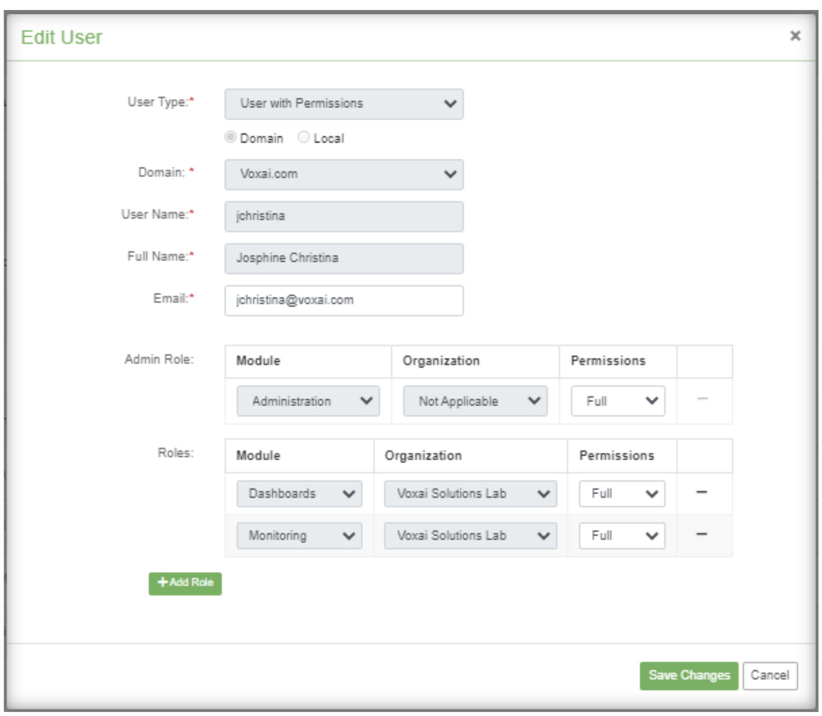



FIGURE: EDITING A USER

To delete an existing Organization, click on the **Delete** icon. It will display a pop-up for delete confirmation, as shown in the below screenshot.

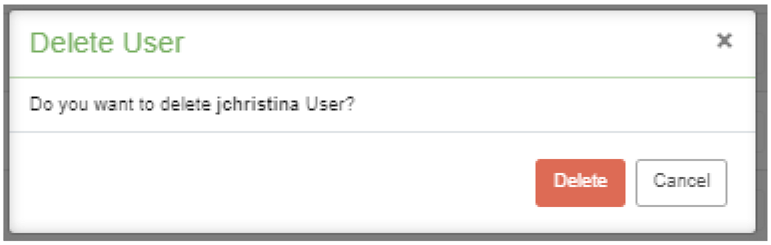



FIGURE: DELETING AN EXISTING USER

## 3.6 System Settings

This sub menu option allows the user to add any system level settings. These settings are related to administrators. This option provides the flexibility to manage system settings rather than updates manually in the flat files or configuration files. Not all the settings can be updated in this view. Only editable configuration details can be updated in this section. When a setting is added it is reflected on the next usage of the component, it does not impact the existing component which is already in use.

Below screen depicts the list of existing system settings displayed, when this sub menu option is selected.

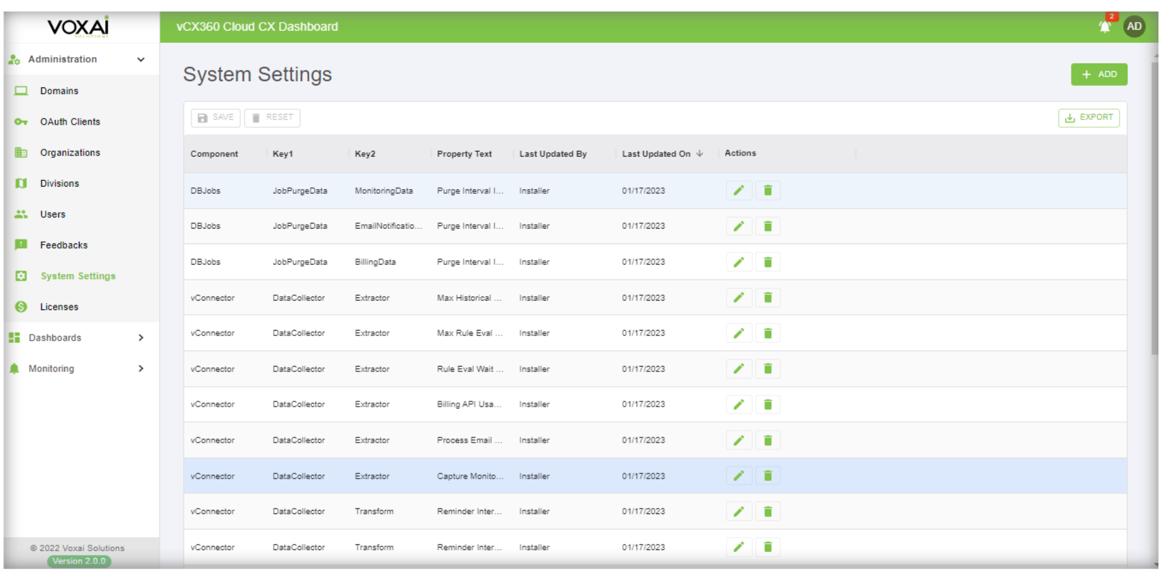



FIGURE: SYSTEM SETTINGS LIST VIEW

A system setting is defined based on the details mentioned below:

**Component**: List of existing components on which settings can be implied.

**Key1, Key2, Key3, Key4**: Indicate the keys related to a setting.

**Description**: Description of a setting

**Property Type**: Indicates the type of property related to the component selected.

**Property name**: Indicates name of the component property

**Property Text**: Any text related to the component property.

**Property Value**: Component property value.

On clicking the sub menu item System Settings in the left navigation panel, a tabular view with all the existing settings is displayed on the right panel. Each row of the tabular view allows the user to edit or delete a setting using the icons respectively.

On the top right corner of the list, a '**Add'** button exists. This button allows the user to add a new system settings. When a user clicks on the add button, a pop-up to enter the details appears. After entering the details, save the data by clicking the **Create** button or cancel by clicking the cross '**x**' icon or **Cancel** button as shown in the screen below.

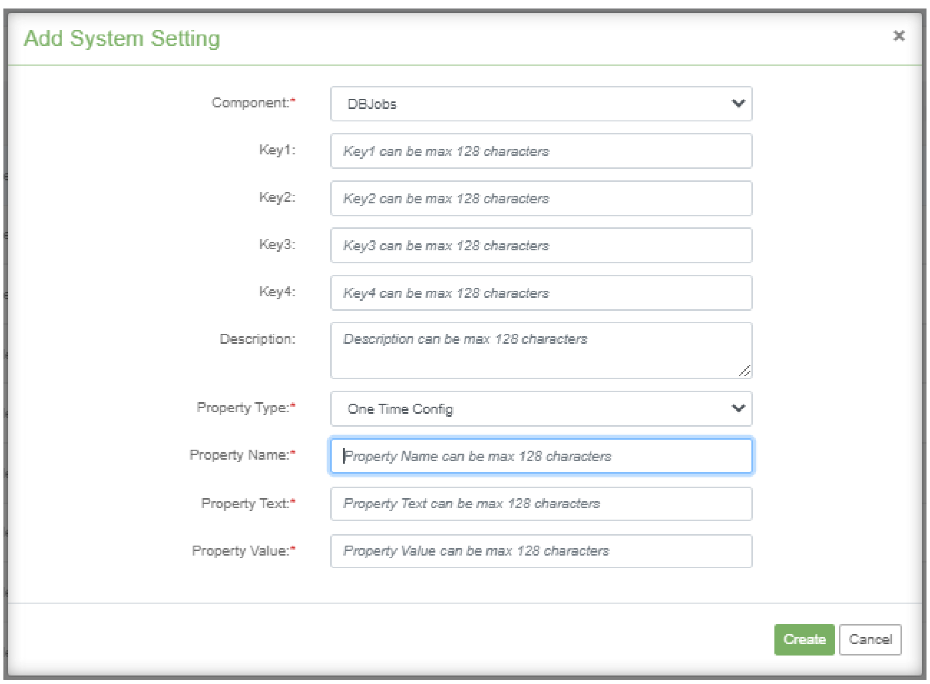
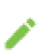



FIGURE: ADDING A NEW SYSTEM SETTING

Edit icon  on each row of the tabular view, allows the user to edit a setting details of an existing System setting. Below is the screenshot of the pop-up to edit the details when the edit icon is clicked.

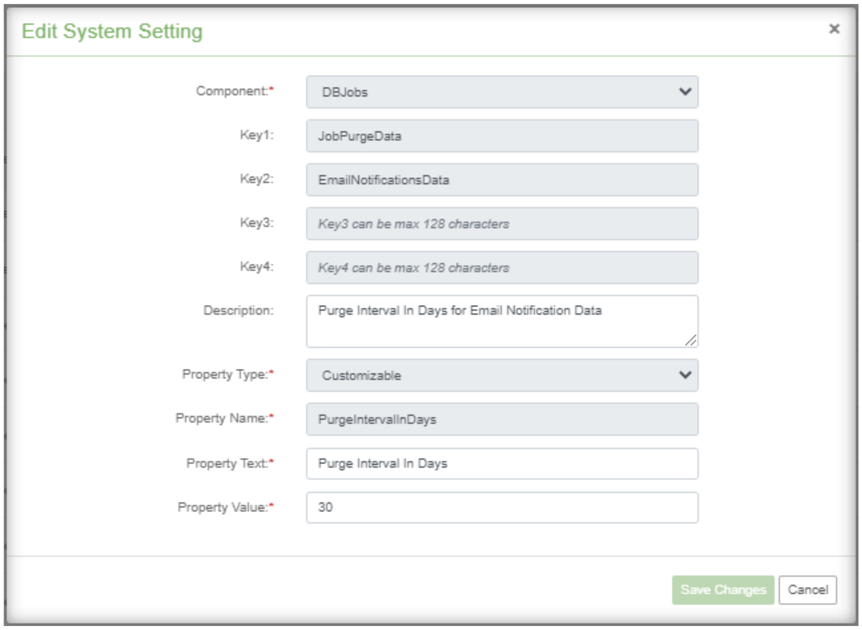



FIGURE: EDITING AN EXISTING SETTING

To delete an existing division, click on the **Delete** icon. It will display a pop-up for delete confirmation, as shown in the below screenshot.

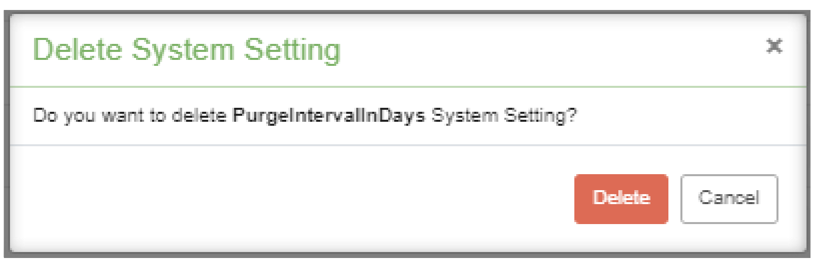



FIGURE: DELETING AN EXISTING SETTING

## 3.7 Licenses

This sub menu option allows the user to upload a license file. A license file indicates the user's accessibility towards a company or organization.

Licenses are defined by attributes like Company, Business Unit, Features, Admin, Editor, Viewer, Generated by, Generated Date, and Expiry Date **fields** as shown below.

**Company**

**Organization**

**Features:** A logical group of related functionalities exposed by the Portal and accessible by users

**Admin P/U/A:** Counts of users with Admin permissions, for which license is procured, Count of used among the licensed and Count of available among the licensed.

**Editor P/U/A:** Counts of users with Editor permissions, for which license is procured, Count of used among the licensed and Count of available among the licensed.

**Viewer P/U/A:** Counts of users with Editor permissions, for which license is procured, Count of used among the licensed and Count of available among the licensed.

**Generated by:** Name of the user who generated the license

**Generated Date:** Defines the date of when license is generated

**Expiry Date:** Defines the expiry date of the license

Below screen depicts the list of existing licenses viewed when this sub menu option is selected.

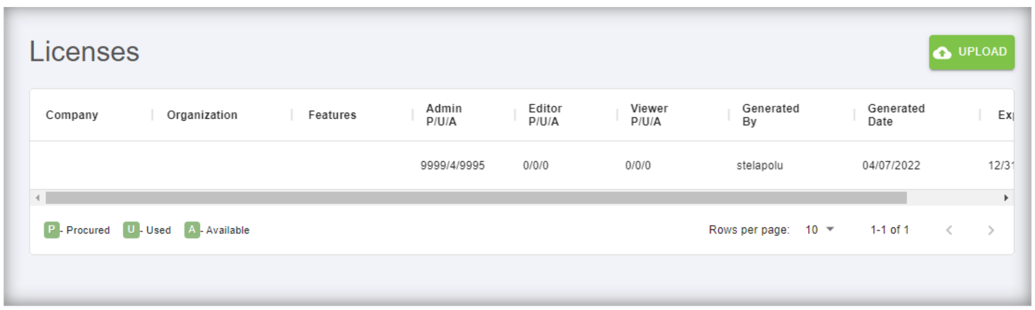



FIGURE: LIST VIEW OF EXISTING LICENSES

There are 2 kinds of license files that can be uploaded:

- Master License: Indicates license updates for all the companies and organizations defined.
- Company License: Indicates license updates specific to a company and the organizations linked to it.

On the top right corner of the list, a '**Upload**' button exists. This button allows the user to upload license file (Shared by the Voxai team). When a user clicks on the upload button, a pop-up to upload the license file is displayed.

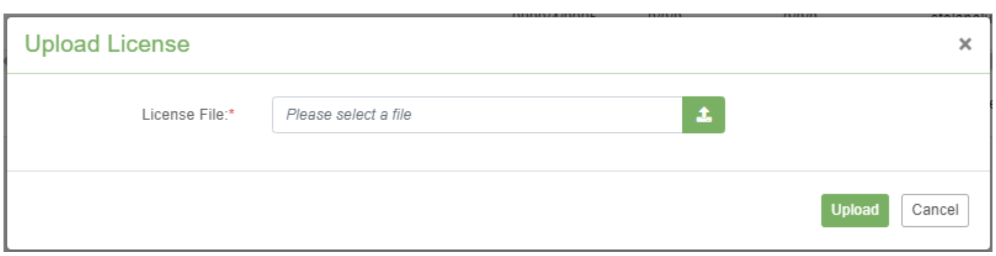



FIGURE: POP-UP TO UPLOAD A LICENSE FILE

## 3.8 Feedbacks

This sub menu option allows the user to provide any kind of feedback related to this application. It enables the Administrators to view the list of application feedbacks received.

Feedbacks are submitted based on the **fields** mentioned below.

**Organization :** Organization from which feedback is submitted.
**Region :** Region of the feedback submitter
**Feedback Type :** Type indicates whether the feedback is related to an enhancement or bug or question etc
**Email :** Email of the feedback submitter.
**New :** Indicates the status of the feedback.
**Attribute01, Attribute02, Attribute03 :** These are optional fields for attributes.

Below screen depicts the list of existing feedbacks submitted when this sub menu option is selected.

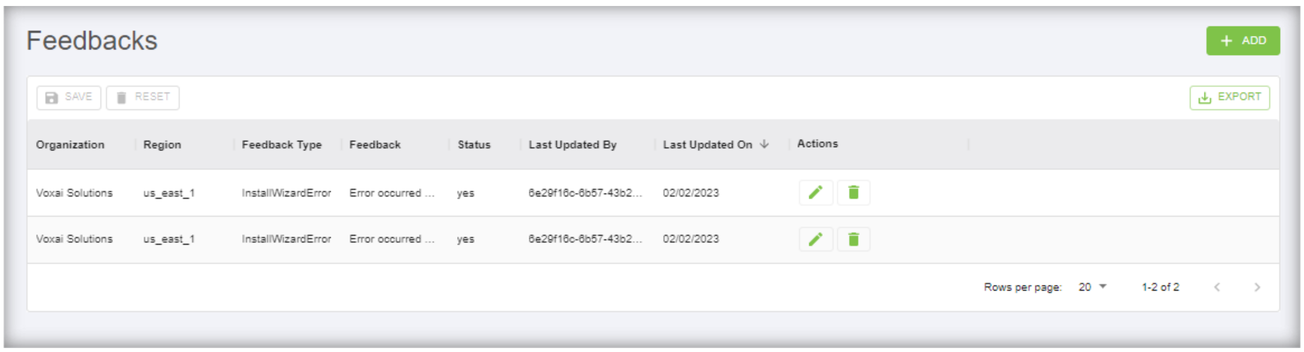



**FIGURE: LIST VIEW OF SUBMITTED FEEDBACKS**

Edit icon on each row of the tabular view, allows the user to edit existing feedback details. Below is the screenshot of the pop-up to edit the details when the edit icon is clicked.

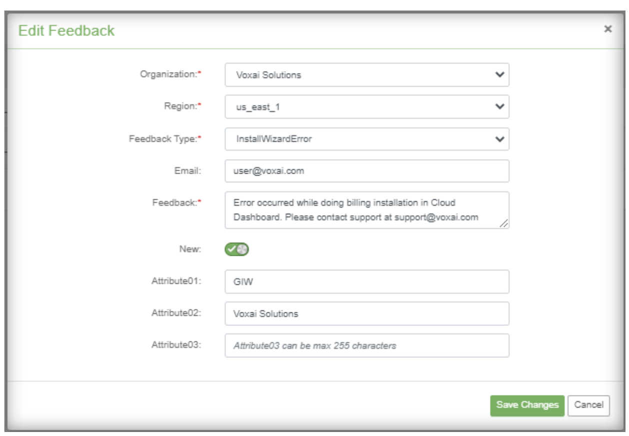



**FIGURE: POP-UP TO EDIT A FEEDBACK**

To delete an existing feedback submitted, click on the **Delete** icon. It will display a pop-up for delete confirmation, as shown in the below screenshot.

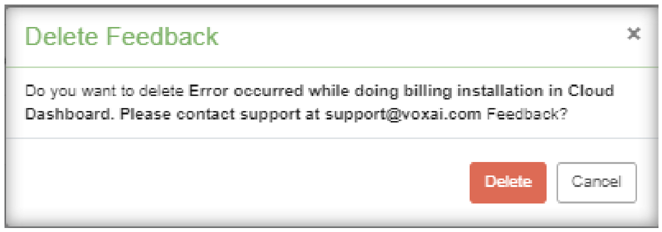



FIGURE: CONFIRMATION TO DELETE A FEEDBACK

# 4 Monitoring

Monitoring is the menu item that allows the users to monitor the few aspects of an organization. A user can define rules based on which Alarms are alerted to respective people of the organization.

## 4.1 Email Templates

This sub menu option allows the user to define an Email Template. Email Template allows the concept of reusability. Email Templates defined here can be used part of Rule Definitions in Monitoring Module.

Email templates are always linked to an organization. The users can view the email templates which are linked to the organization to which the user has access to.

Below screen depicts the list of existing email templates viewed when this sub menu option is selected.

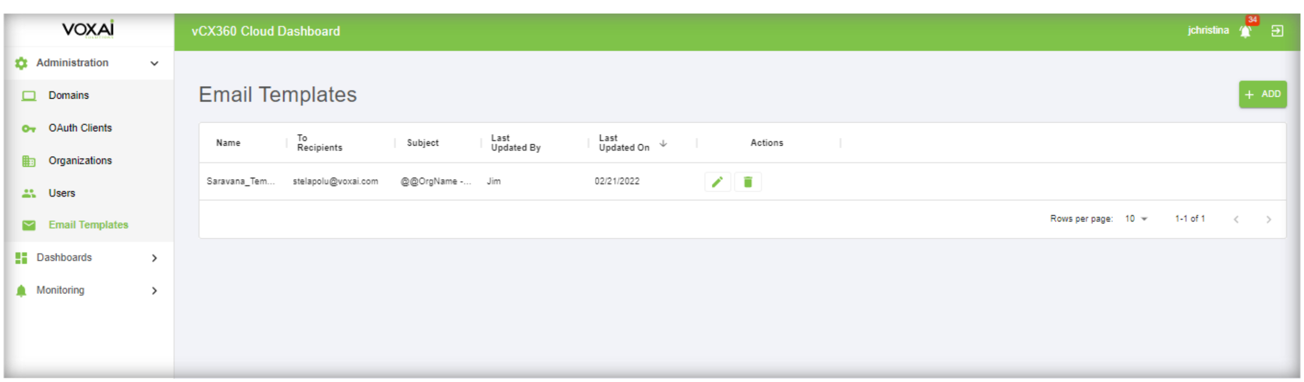



FIGURE: EMAIL TEMPLATES LIST VIEW

An email template is defined based on the details like

**Name**: Email Template Name

**To Recipients**

**CC Recipients**

**BCC Recipients**

**From Sender**

**Subject**

**Message**

**Organization:** Organization to which an email template is linked to

On the top right corner of the list, a '**Add'** button exists. This button allows the user to add a new email template. When a user clicks on the add button, a pop-up to enter the details appears. After entering the details, save the data by clicking the **Create** button or cancel by clicking the cross '**x**' icon or **Cancel** button as shown in the screen below.

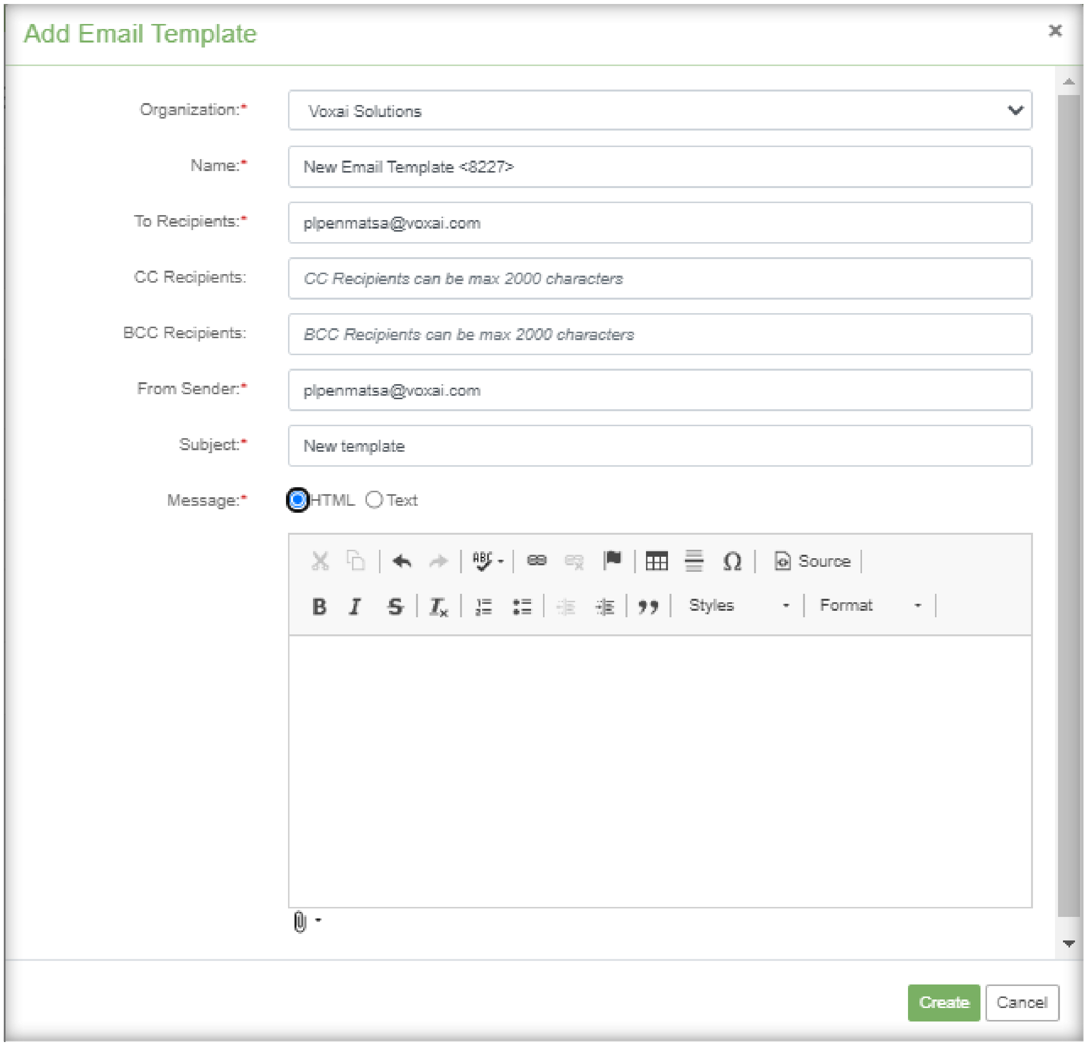



FIGURE: ADDING A NEW EMAIL TEMPLATE

In the email subject as well as in the email body, user can add pre-defined keys to dynamically substitute the respective values. Although there is no dropdown available for subject field, the user needs to manually copy paste the key from the email body text editor. In the text editor of the email body, user can select the necessary keys from the dropdown available and when a key is added to the text it is displayed with prefix @@.

For example, if key  OrgName is selected from the dropdown then that key is displayed as @@OrgName in the email body text. But when the email is triggered to the destination then that @@OrgName key is replaced with the respective value. Please refer to the below screenshot (FIGURE: EDITING AN EMAIL TEMPLATE).

Edit icon  on each row of the tabular view, allows the user to edit the existing email template details. Below is the screenshot of the pop-up to edit the details when the edit icon is clicked.

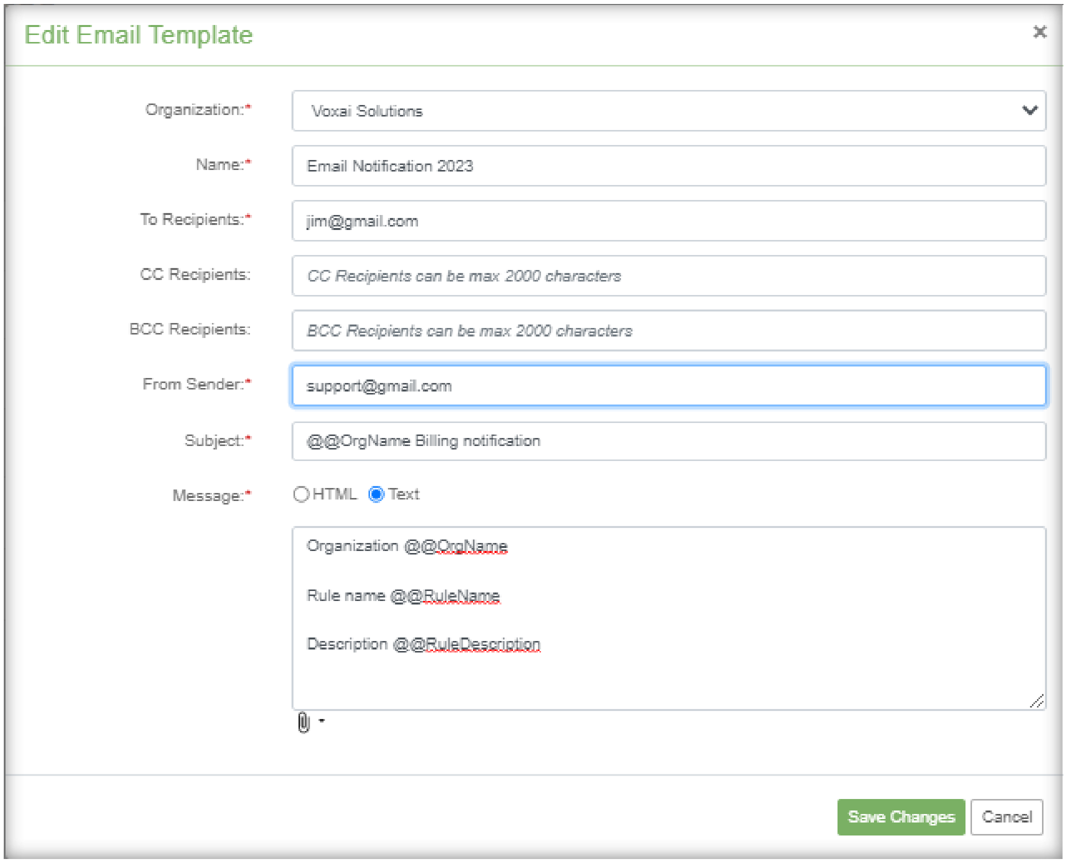



**FIGURE: EDITING AN EMAIL TEMPLATE**

To delete an existing email template, click on the **Delete** icon. It will display a pop-up for delete confirmation, as shown in the below screenshot.

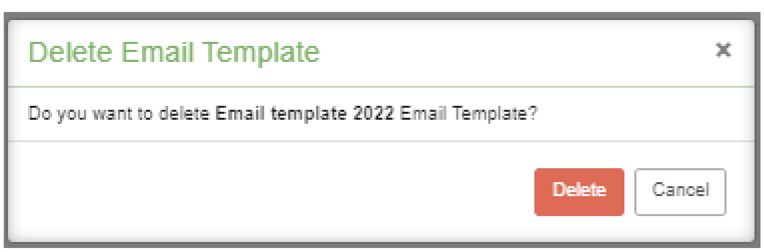



**FIGURE: DELETING AN EXISTING EMAIL TEMPLATE**

In the Rich Text Editor, User can Copy/Paste text from a Word Document / Email for quick setup. But it is recommended Email Templates are tested using Test Monitoring Rules before used for Production Rules.

On the email templates list screen, clone icon button is displayed. It allows the user to create a cloned email template.

## 4.2 Monitoring Rules

This sub menu item allows the users to create rules for monitoring. Monitoring rules are conditions based on which alarms are triggered. In this section a user can also define the priority of the rule based on rule type and entity.

When the user clicks on this sub menu item, the listing page is displayed as below, where the user has visibility of the rules which the user has access to:

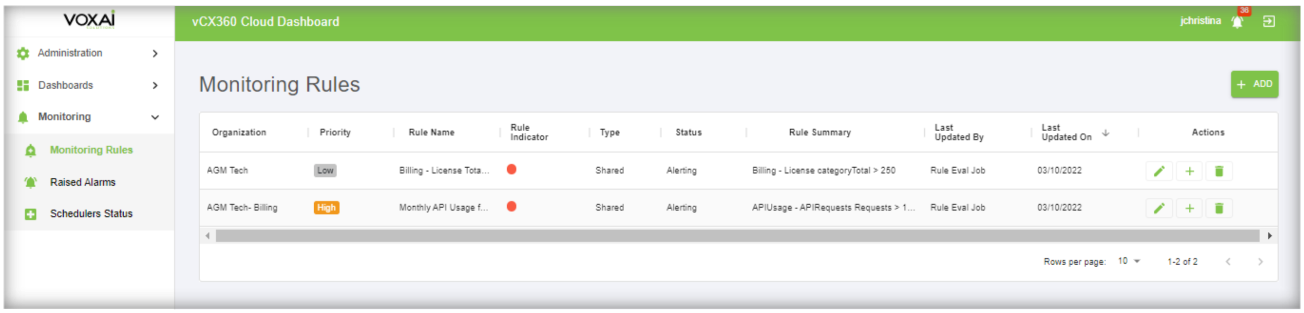


FIGURE: LIST VIEW OF MONITORING RULES

### 4.2.1 Add Monitoring Rules

On the top right corner of the list, a '**Add'** button exists. This button allows the user to add a new Monitoring rule. When a user clicks on the add button, a pop-up to enter the details appears. User can cancel by clicking the cross '**x**' button on the top right of the pop-up.

First enter the details like Organization, Rule name and description in the "**Rule Metadata**" section, then click next. Below is the screenshot:

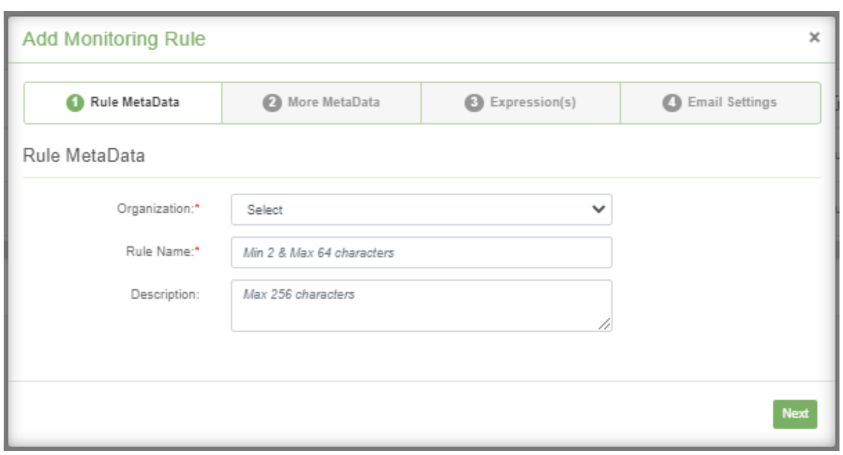


FIGURE: ADDING A MONITORING RULE – RULE METADATA

Now enter other details mentioned below, in the "More metadata" section. And click "**Next**".

- **Priority –** Indicates the priority level of the rule. Possible values for this field are Critical, High, Medium and low. Based on this priority the color is displayed.
    - Grey color for Low Priority
    - Yellow color for Medium Priority
    - Orange color for High Priority
    - Red color for Critical Priority
- **Rule Type (Notification Type) –** Indicates the type of rule. Possible values for this field are
    - Shared
        - This Rule Type is useful for a NOC Center where a team performs monitoring and the Alarm if Raised is not specific to any person.
    - Personal
        - This type of Rule is used to create an Alarm if the Rule criteria is met as a Personal Alarm for Users selected on this Rule. One Alarm would be created for each of the User selected part of this Rule.

**Status –** Indicates the status of the rule.

- Active
    - This status of a rule indicates that it can be evaluated at periodic intervals.
- InActive
    - This status of a rule indicates that rule will not be evaluated for some period. The user can update a rule to Inactive status when it is intended not to be evaluated.
- Alerting
    - If the criteria provided part of the Rule is met, an Alarm is raised
    - When a rule is in this status, an Initial Email Notification is sent.
    - Then Email Reminders would be sent at regular intervals and the frequency is determined by the Rule's Priority. Though the frequency is configurable (system wide setting), out of the box the reminder frequency is as follows:
        - Critical – Reminder every 30 mins
        - High – Reminder every 60 mins
        - Medium – Reminder every 120 mins
        - Low – Reminder every 240 mins
    - Then the Rule's status is set to Alerting indicating that this Rule fired. As described in Active State, Rule won't be evaluated during this status as well. This status would get reset back to Active at end of the day, so Rule could be monitored for next day.

- Alerting_Muted
    - If Reminders are not desired any more for rest of the day, an Rule in Alerting status could be updated to Alerting Muted. This status would get reset back to Active at end of the day, so Rule could be monitored for next day.
- Maintenance Mode
    - This status allows a Rule to be temporary suspended, so that isn't evaluated. Here Maintenance Reset Duration is captured which would allow the system to automatically update the status of this Rule back to Active.
- Invalid
    - Rules created in the system are based on few Genesys Entities. It is likely that some Genesys Entity for which we have created a Monitoring Rule gets deleted in Genesys system. When this happens, the rule is updated to Invalid, giving Indication to User to revist the rule and make relevant updates.

- **Rule Entity –** Indicates the entity on which this rule is related to. This can also be considered as Rule Type.
- Possible values are:
    - Queue
        - Rule Expression can be created on the Conversation Aggregates for different queues.
    - Agent
        - Rule Expression can be created on the Conversation Aggregates for different Agents.
    - Billing
        - Rule Expression can be created for Billing Category Totals for different following sections. API, Devices, IVR, Licensing, Messaging, Resources, Storage
    - Edge, Phone, Line
        - Rule Expression can Edge/Phone/Line State (Active/Inactive/Deleted)
    - Bot
        - Rule Expression can be created on Bot Aggregates. For current Release, Google Dialog Flow Bots and Lex Bots are supported.
    - API Usage
        - Rule Expression can be created on Monthly API Usage across Organization (based on Organization's Billing Cycle).

- API Usage By Client
  - Rule Expression can be created on Monthly API Usage by different OAuth Client (based on Organization's Billing Cycle).
- Genesys API Gateway
  - Retrieving Genesys Data using public Rest APIs is critical for Monitoring to be applicable. But there could be occasions when the Genesys API Gateway is down or experiencing issues. This Rule's Expression would allow to get Notification if the Genesys API call were to fail.
- Cloud Dashboard Scheduler Status
  - The monitoring solution has multiple scheduler components which perform different activities. This Rule's expression would allow monitoring of these different scheduler components. If any of the scheduler component were to fail, its status would not be updated. So last update date would give us a duration since last succesful run.

- **Genesys Entity** – Indicates the Genesys Entity to which the rule entity is related to. This field is not applicable for Rule Entity of type Billing, API usage (Organization level), Genesys API Gateway or Cloud dashboard scheduler status.
- **Whom to notify –** When Rule Notification Type us Personal, User can select multiple users whom should receive the App based Raised Alarms. In the Raised Alarms page, you could see Owner field. It would be empty for Shared Type and relevant user would be applicable for Personal Type.

**Below is the screenshot of the "More Metadata" section**

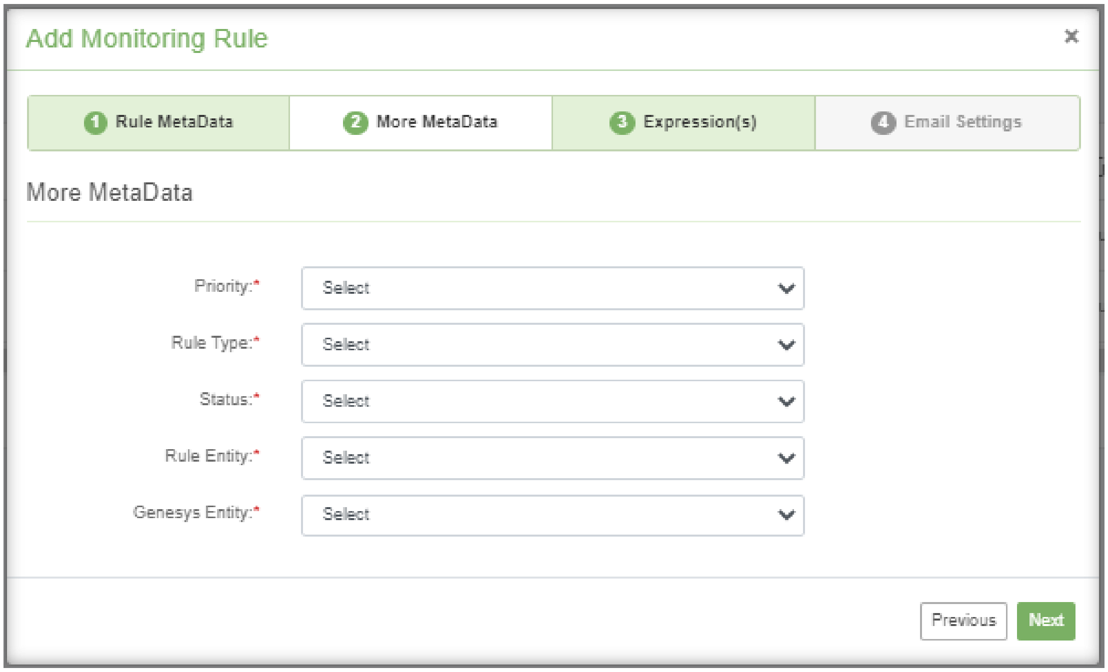



**FIGURE: ADDING A MONITORING RULE – MORE METADATA**

Below is the screenshot when the rule type selected is "**Personal**":

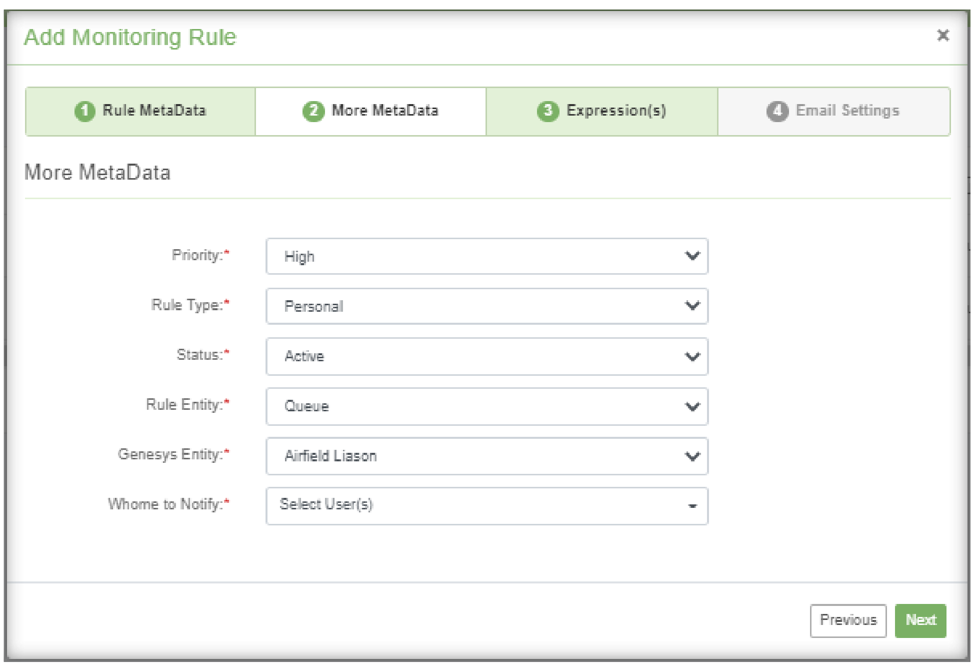



**FIGURE: ADDING A MONITORING RULE – MORE METADATA**

Now enter details mentioned below in the "**Expression(s)**" section. And click "**Next**".

Expression comprises of multiple fields and the same vary based on the Rule Entity Type selected in the previous tab.

- **Type Metric** : Indicates the Metric on which the defined monitoring rule will be evaluated.
    - Queue / Agent / Bot:
        - For this Rule Entity Type,
    - Edge / Line / Phone:
        - Here we can check for Phone state.
    - Billing
        - Category

| S.No. | RuleEntityType | Type Metrics |
|---|---|---|
| 1 | Queue | There would be numerous Metrics available part of Conversation Aggregates data. Queue/Agent share similar options given they are metrics of Conversations aggregated by different Queue/Agent. Some of the metrics include Offered Interactions, Held Interactions, Abandoned Interactions etc. |
| 2 | Agent | There would be numerous Metrics available part of Conversation Aggregates data. Queue/Agent share similar options given they are metrics of Conversations aggregated by different Queue/Agent. Some of the metrics include Offered Interactions, Held Interactions, Abandoned Interactions etc |
| 3 | Edge | State |
| 4 | Line | State |
| 5 | Phone | State |
| 6 | Billing | Here it isnt exactly Metrics, different Billing Categories we have |
| 7 | API Usage [Organization] | API Requests |
| 8 | API Usage By OAuth Client | API Requests |
| 9 | Genesys API Gateway | Availability |
| 10 | Scheduler Status | Different Schedulers<br>• Billing Data Capture<br>• Monitoring Data Capture<br>• Rule Evaluation<br>• Maintenace Reset Job<br>• Mid Night Reset Job<br>• Email Notification Processing<br>• Purge Data Job |

- Some of the metrics available for Queue/Agent are listed below. Tooltips are added to provide quick description for different options in the dropdown:

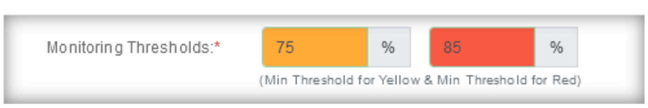
| Type Metric Value | Description |
|---|---|
| Abandoned Interaction | The amount of time before an end user abandoned an interaction in a queue. |
| Agent Alerted Time | The time an agent was being alerted. |
| Agent Talk Time | Time an agent spent talking/interacting. |
| Agent Talk Time Complete | The overall time an agent spent talking/interacting. |
| Agent Response Time | The amount of time the user spent waiting for a response from the agent. |
| Blind Transferred Interactions | The number of interactions that were blind transferred. |
| Coaching Complete Time | The overall time a supervisor spent coaching another agent. |
| Connected Sessions | The number of connected customer sessions. |
| Contacting Duration for Outbound Call | The time that it takes to establish a connection with your station on an outbound call. |
| Dialling Duration | The time an agent spent dialing. |
| Edge Clock Skew Errors | The number of errors caused by Edge clock skew. |
| FlowOut Duration | The amount of time before an interaction was transferred out of a queue (and not answered by an agent). |
| Handled Interactions | The complete time an agent spent on an interaction, includes time spent contacting, time spent dialing, talk time, hold time, and after call s |
| Held Interactions | The amount of time an interaction was placed on hold. |
| Hold Time | The overall hold time for an interaction. |
| Interaction Answered | The amount of time an interaction waited to be connected to an agent. |
| Interactions ACD | The amount of time spent waiting in queue before an interaction was answered, abandoned or flowed out of queue. |
| Interactions After Call Work | The amount of time spent in after call work. |
| Interactions over SLA | The number of answered interactions that were over the SLA threshold. |
| Interactions with Consult | The number of interactions where an agent consulted another agent. |
| Monitoring Time | The time spent monitoring an interaction. |
| NotResponding Duration | The time an agent was being alerted without responding to a queue conversation. |
| Observed MediaCount - External Participant | Observed total media count for an external participant. |
| Observed MediaCount - Internal Participant | Observed total media count for an internal participant e.g. an agent. |

| | |
|---|---|
| Offered Interactions | The number of interactions offered to a queue by an Automatic Call Distributor (ACD). |
| Outbound Dialer Calls - Abandoned | The number of outbound dialer calls that were abandoned. |
| Outbound Dialer Calls - Attempted | The number of outbound dialer calls attempted. |
| Outbound Dialer Calls - Connected | The number of outbound dialer calls that connected. |
| Outbound Interactions | The number of outbound conversations placed on behalf of a queue. |
| Service Level | The service level for a queue. |
| Service Target | The service target for a queue. |
| Sessions Errored | The number of active sessions aborted due to an Edge or adapter error event. |
| ShortAbandon Duration | Subset of abandon with a duration under the short abandon threshold. |
| Time spent on IVR | The amount of time spent in IVR. |
| Transferred Interactions | The number of interactions transferred. This includes blind and consult transfers. |
| Transferred Interactions with Consult | The number of interactions that were transferred as part of a consult. |
| User Response Time | The amount of time spent waiting for an end user response. |
| Voicemail Duration | The amount of time spent in voicemail. |
| Wait Duration | The amount of time spent waiting in queue before an interaction was answered, abandoned, or flowed out of queue. |

- **Metric Attribute** – Indicates the specfic attribute of the metric to evaluate the rule. Here too, the Attributes options available for different Metrics are different.
  - Queue/Agent
    - Count
    - Sum Duration
    - Min Duration
    - Max Duration
    - Derived Rate (applicable only for certain Metrics).
      - Count of current metric / count of nOffered Metric * 100
      - Example: Abandoned Call Count / Offered Call Count * 100
  - Billing
    - Category Total (Billing)
  - Edge / Line / Phone
    - State

- Bot Aggregates
  - Numerator
  - Denominator
  - Ratio
  - Current
  - Target
- API Usage / API Usage By OAuth Client
  - Requests
  - Derived Rate
    - Requests / APIUsageFreeQuantity * 10
    - Free API Usage Quantity isn't available for every organization. When not available derived rate is not applicable.
- Genesys API Gateway
  - Available
- Scheduler Status
  - Elapsed Duration

- **Media** – Indicates the Media Type options like Voice, Callback, Chat, Email, Message, Call etc
- **Operator** – Indicates the operator used in the rule.
- **Value** – Indicates the value to compare with current or latest value during Rule Evaluation.
- **Colored Icon** – Rule Indicator. This gives an indication of how close the Rule's criteria with actual or current value. For example, say I have a Rule Expression with Abandoned Interation Count for a Queue > 50. If the number of Abandoned Interations till now is say 20, then we see the Rule Indicator in Green. If it is say 45, we see it in Red. The precentage ( Current value / Threshold Value in Rule * 100 ) and configuration for Monitoring Thresholds set in Organization Screen determines which color is shown.




Below is the screenshot of "**Expression(s)**" section:

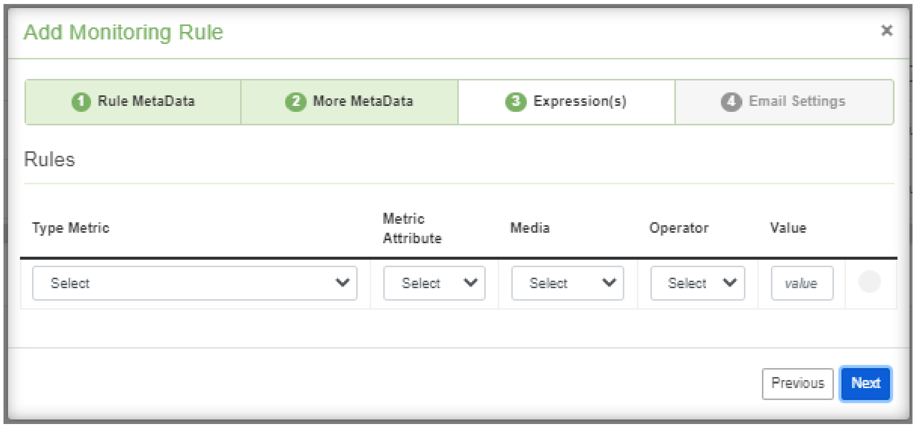



FIGURE: ADDING A MONITORING RULE – EXPRESSION(S)

Now enter details mentioned below in the "**Email Settings**" section. And click "**Create**"

- **Default Template** – Indicates an already existing template to use. These are defined in the Email Templates section (Refer Section 3.6)
- **Overide** – When user enables this button, the default template values can be updated in this instance for this particular rule. Original template created in the email Templates section is not overwritten.
- **Name**
- **To Recipients**
- **CC Recipients**
- **BCC Recipients**
- **From Sender**
- **Subject**
- **Message –** Email body

Below is the screenshot of the **Email Settings** section in monitoring rules:

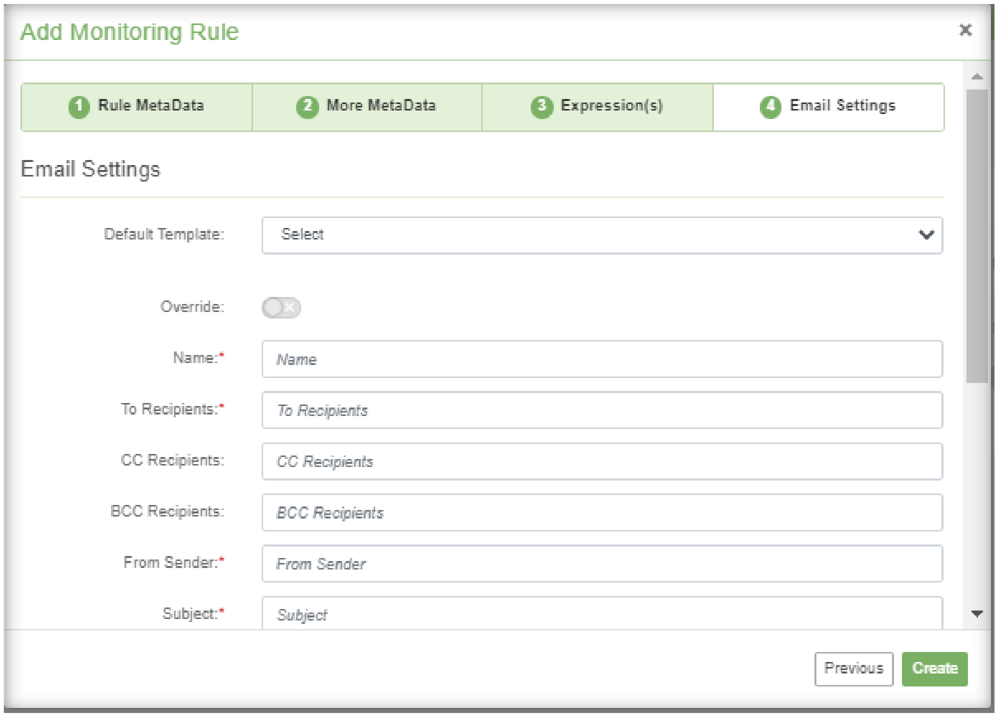



FIGURE: ADDING A MONITORING RULE – EMAIL SETTINGS

### 4.2.2 Edit Monitoring Rules

Edit icon  on each row of the tabular view, allows the user to edit the existing Monitoring Rule details. Below is the screenshot of the pop-up to edit the details when the edit icon is clicked.

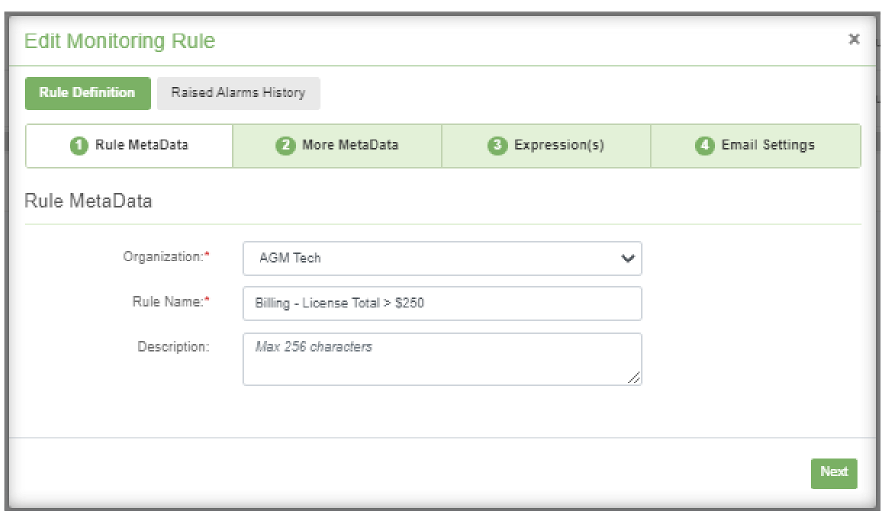
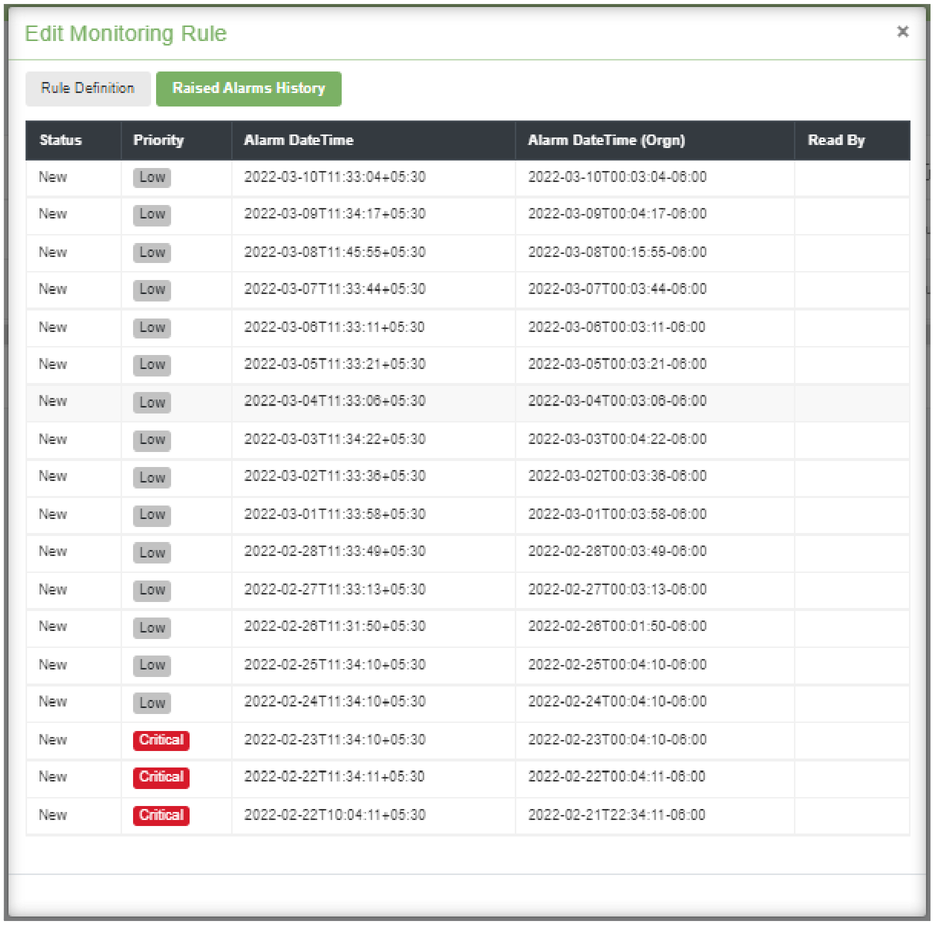



FIGURE: EDITING A MONITORING RULE – RULE DEFINITION METADATA

In the “**Raised Alarms History**” tab, user can view all the occurrences of alarms for this rule (data which isn’t purged). Below is the screenshot to refer:




| Status | Priority | Alarm DateTime | Alarm DateTime (Orgn) | Read By |
|---|---|---|---|---|
| New | Low | 2022-03-10T11:33:04+05:30 | 2022-03-10T00:03:04-06:00 | |
| New | Low | 2022-03-09T11:34:17+05:30 | 2022-03-09T00:04:17-06:00 | |
| New | Low | 2022-03-08T11:45:55+05:30 | 2022-03-08T00:15:55-06:00 | |
| New | Low | 2022-03-07T11:33:44+05:30 | 2022-03-07T00:03:44-06:00 | |
| New | Low | 2022-03-06T11:33:11+05:30 | 2022-03-06T00:03:11-06:00 | |
| New | Low | 2022-03-05T11:33:21+05:30 | 2022-03-05T00:03:21-06:00 | |
| New | Low | 2022-03-04T11:33:06+05:30 | 2022-03-04T00:03:06-06:00 | |
| New | Low | 2022-03-03T11:34:22+05:30 | 2022-03-03T00:04:22-06:00 | |
| New | Low | 2022-03-02T11:33:36+05:30 | 2022-03-02T00:03:36-06:00 | |
| New | Low | 2022-03-01T11:33:58+05:30 | 2022-03-01T00:03:58-06:00 | |
| New | Low | 2022-02-28T11:33:49+05:30 | 2022-02-28T00:03:49-06:00 | |
| New | Low | 2022-02-27T11:33:13+05:30 | 2022-02-27T00:03:13-06:00 | |
| New | Low | 2022-02-26T11:31:50+05:30 | 2022-02-26T00:01:50-06:00 | |
| New | Low | 2022-02-25T11:34:10+05:30 | 2022-02-25T00:04:10-06:00 | |
| New | Low | 2022-02-24T11:34:10+05:30 | 2022-02-24T00:04:10-06:00 | |
| New | Critical | 2022-02-23T11:34:10+05:30 | 2022-02-23T00:04:10-06:00 | |
| New | Critical | 2022-02-22T11:34:11+05:30 | 2022-02-22T00:04:11-06:00 | |
| New | Critical | 2022-02-22T10:04:11+05:30 | 2022-02-21T22:34:11-06:00 | |

FIGURE: EDITING A MONITORING RULE – VIEW RAISED ALARMS HISTORY

### 4.2.3 Delete Monitoring Rules

To delete an existing Monitring rule, click on the **Delete** icon. It will display a pop-up for delete confirmation, as shown in the below screenshot.

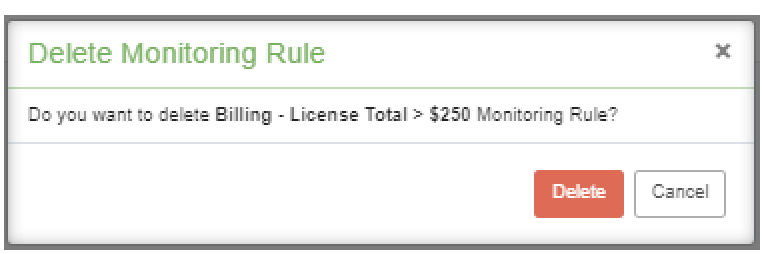



FIGURE: DELETING A MONITORING RULE

### 4.2.4 Clone Monitoring Rule

On the monitoring list screen, clone icon button is displayed. It allows the user to create a cloned monitoring rule. Clicking on this icon button, popup to edit the new cloned monitoring rule is displayed.

## 4.3 Raised Alarms

This sub menu option allows the users to view all the alarms along with statuses, for the organization to which that user has access to. User can also get notifications for the raised alarms based on the organization access.

A user can see both Alarms of Type “Shared” and “Personal” for which they are the owner. Super Admin user has visibility of all the Alarms.

User can view the alarm notifications through the bell icon on the top right corner of the screen as highlighted in the below screenshot. It shows the Number of Alarms in New Status. In the Listing page, “New” alarms show on top of the table and they are Highlighted in Bold. Once any user views / edits an alarm, it is updated to Viewed status. If don’t unintentionally, part of Edit Page you can change the status back to New.

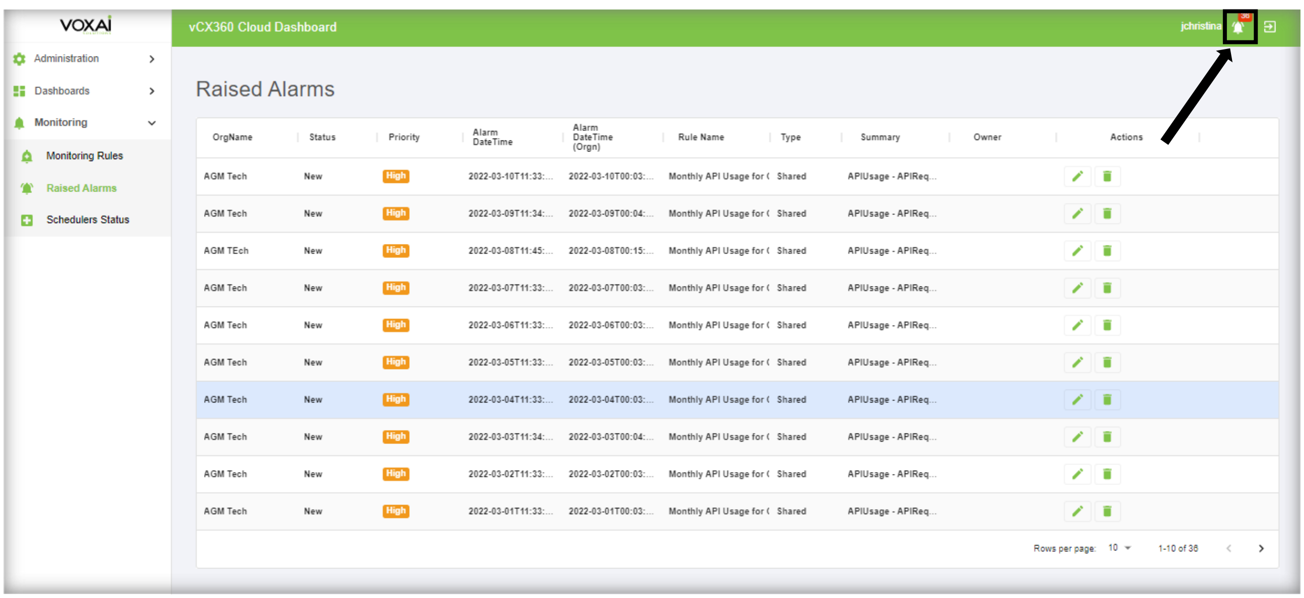



FIGURE: LIST VIEW RAISED ALARMS

Edit icon on each row of the tabular view, allows the user to edit the status of the raised alarm. Below is the screenshot of the pop-up to edit the details when the edit icon is clicked. Notes section allows the user to capture some quick notes pertaining to the alarm if desired. There is no workflow associated with the alarms.

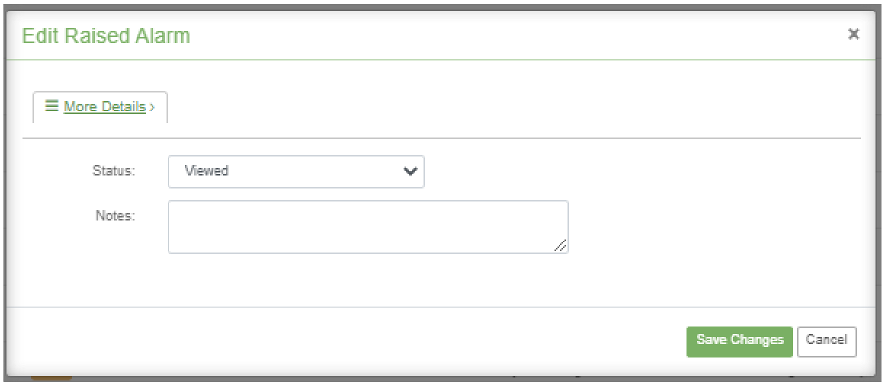



FIGURE: EDIT STATUS OF A RAISED ALARM

Possible statuses to update a raised alarm are Viewed or Closed.

To delete an existing raised alarm, click on the **Delete** icon. It will display a pop-up for delete confirmation, as shown in the below screenshot.


FIGURE: DELETE A RAISED ALARMS

## 4.4 Schedulers Status

This sub menu item allows the user to view and check how the different schedulers are working. If there were any unrecoverable errors, the given scheduler will skip updating last successful execution time. Status shows in "Yellow" color if any of the scheduler has errors in one of its execution. The color changes to "Red", if errors occur on consecutive executions.

- **Billing Stats Collected**
  - Collects Billing Information from Genesys.
- **Monitoring Stats Collected**
  - Collects Billing Information from Genesys.
- **Rule Evaluation**
  - Evaluates the Rules for a given Organization based on the data already collected.
- **Mid Night Reset Processing**
  - This application performs Daily Monitoring. At Mid Night (based on Organization's Timezone), all the Rules in Alerting, Alerting_Muted are updated back to Active Status so that monitoring can start fresh from next day.

- **Successful Email Processing**
  - Processes Email/Reminder Notifications.
- **Maintenance Reset Processing**
  - Job which runs periodically to check for Rules in Maintenance Mode and reset them back to Active once the Maintenance Reset Duration is elapsed.
- **Purge Processing**
  - Purges data based on system wide settings.

When the user clicks on this sub menu item, the page is displayed as below:

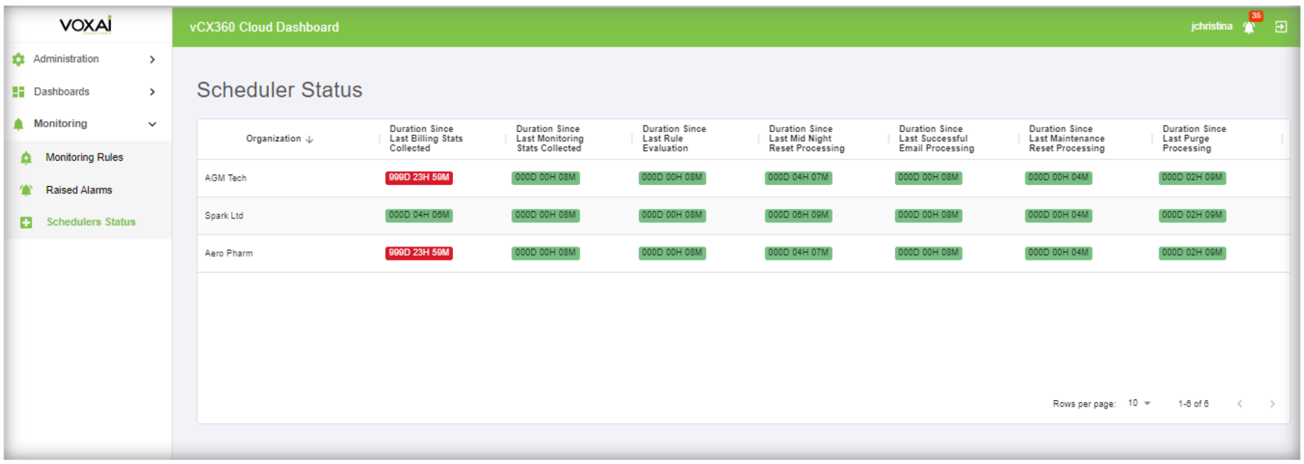



**FIGURE: LIST VIEW OF SCHEDULERS**

## 4.5 Genesys Cloud Status

This sub menu item allows the user to have the view of status of all the genesys services. Status indicates if the specific service is in outage or Partial Outage or has Degraded operations or is having normal operations.

Below is the view displayed when this sub menu item is selected:

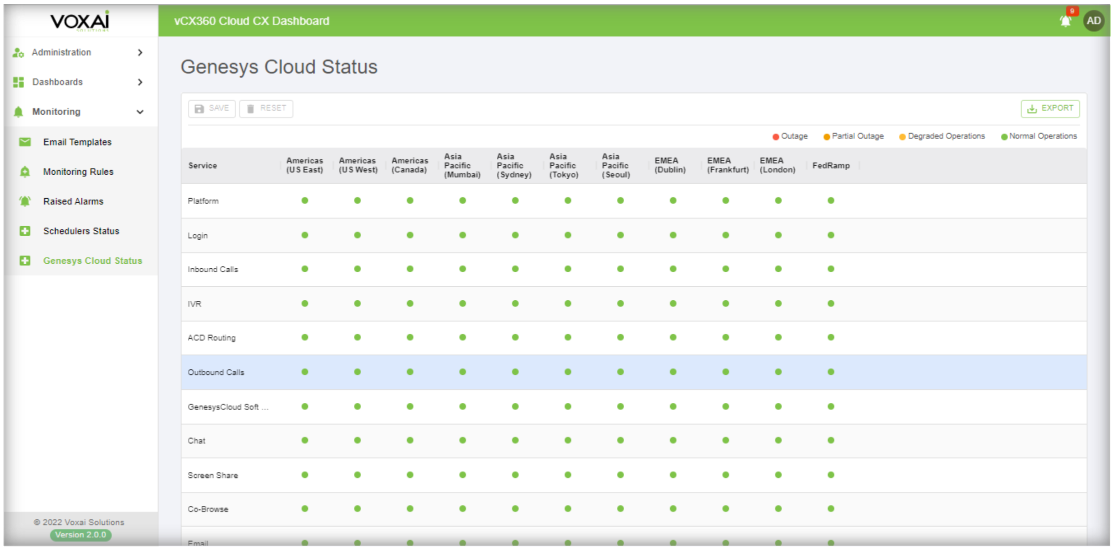



**FIGURE: LIST VIEW OF GENESYS CLOUD SERVICE STATUS**

# 5 Dashboard

Dashboard provides the visual display of all the details based on an organization. A specific user shall be able to see the data related to the organizations for which that user has access to. Super Admin has access to All the Organizations. There are 2 sub menu items in this dashboard menu:

- All Organizations Summary
- Details by Org

## 5.1 All Organizations Summary

This sub menu option provides the bird's eye view of billing based on different Billing Categories and the Monitoring Summary. It's the view of how overall billing parameters stand and overall color codes for monitoring summary. All the # and $ icons in this chart are clickable icons which redirect to detail charts respectively.

These are the details related to the color codes, and these colors are determined based on the limit or threshold values defined in the organization definition:

- Green – This color indicates that all respective parameters are at healthy levels.
- Yellow – This color indicates that respective parameters need attention.
- Red – This color indicates the parameters are near or crossed the thresholds defined.

There is a list of categories that are displayed in the invoice. Those categories are displayed in this chart:

- Billing API
- Billing Device
- Billing IVR
- Billing License
- Billing Messaging
- Billing Resource
- Billing Storage

Each Billing category related column in this chart indicates 2 specific details, which are:

- License related items – This is indicated by # symbol.
    - Part of Genesys Subscription model, an organization can Pre-Purchase different items and they typically have a discounted rate compared to OnDemand changes. The # symbol's color provides quick insight into how we are performing on the Pre-Purchased items's stand point.
- Category Total – This is indicated by $ symbol. These values depend on the defined organization thresholds. The field in organization definition that determine this value is "Category Totals Thresholds".

Monitoring Summary is another type of column included in this chart. Monitoring Summary is displayed based on Monitoring status and "New" raised alarms count for a today. The possible colors displayed are

- Red – This color indicates the "Critical" priority of raised alarms
- Yellow – This color indicates the "High" priority of raised alarms
- Grey – This color indicates the "Low" priority of raised alarms
- Green – This color indicates that there are no raised alarms

Monitoring Summary icons in this chart are clickable icons which redirect to raised alarms page in Monitoring menu but displays the filtered Raised Alarms for that Organization / Date and status of New.

In the Left bottom of this chart, there is an option to enable or disable the flashing of the values in "Red" which indicate critical. When the toggle button "Enable Flashing Red" is enabled, then all the items in the red blink to indicate that attention is needed.

Below is the screenshot of "All Org Summary" view:

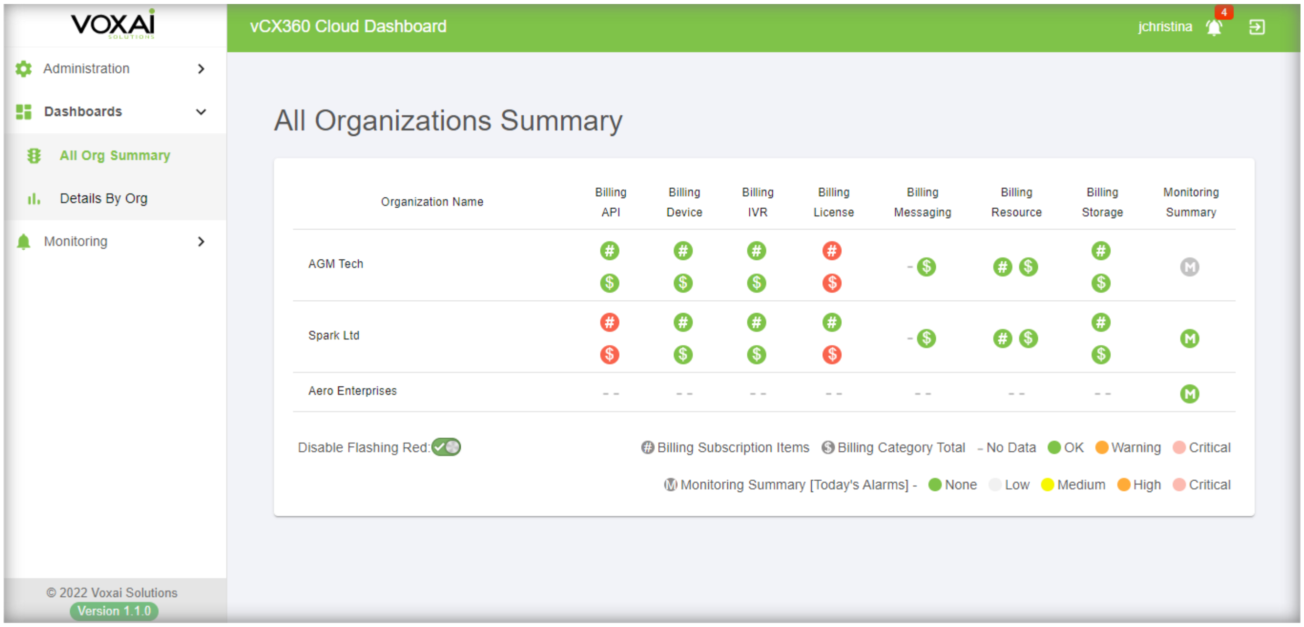



**FIGURE: DASHBOARD – ALL ORGANIZATIONS SUMMARY**

When the hovers on the # icon button, the “Committed items” details are displayed.

When the hovers on the $ icon button, the “Category Total" details are displayed.

When the user clicks on the # or $ icons, then user is redirected to the respective detailed graph in the “Details By Org” section (Refer Section 5.2). Below are the redirected details when user clicks on:

- Billing API – Redirects to “Billing - Subscriptions - API” graph
- Billing Device – Redirects to “Billing - Subscriptions - Device” graph
- Billing IVR – Redirects to “Billing - Subscriptions - IVR” graph
- Billing License – Redirects to “Billing - Subscriptions - License” graph
- Billing Messaging – Redirects to “Billing - Subscriptions - Messaging” graph
- Billing Resource – Redirects to “Billing - Subscriptions - Resource” graph
- Billing Storage – Redirects to “Billing - Subscriptions - Storage” graph

If there is no data for a category in an organization then the respective values in this chart are displayed as Hyphen(-). And graph or view is not displayed in detailed view page, as there is no usage.

In brief, below is the illustration:

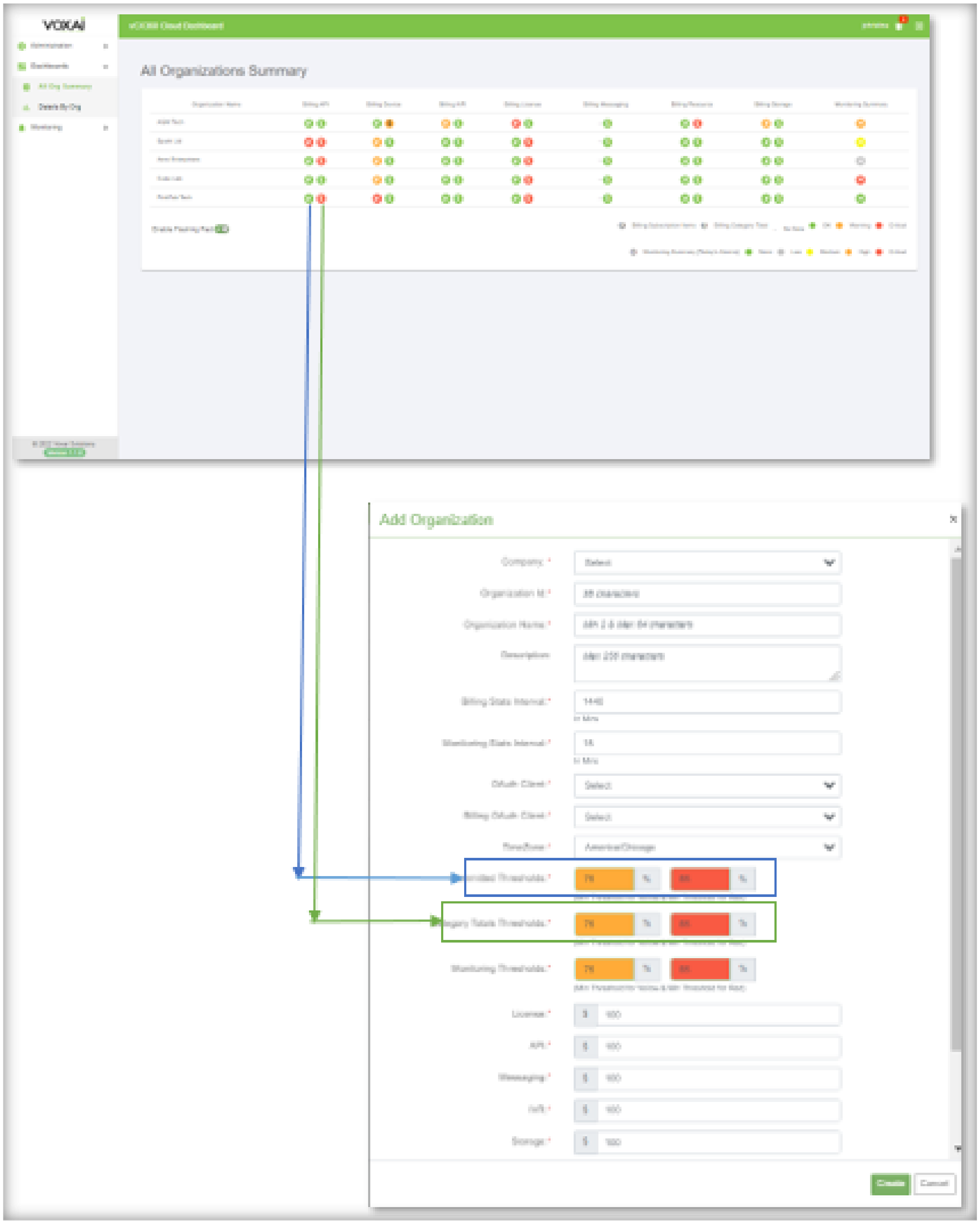
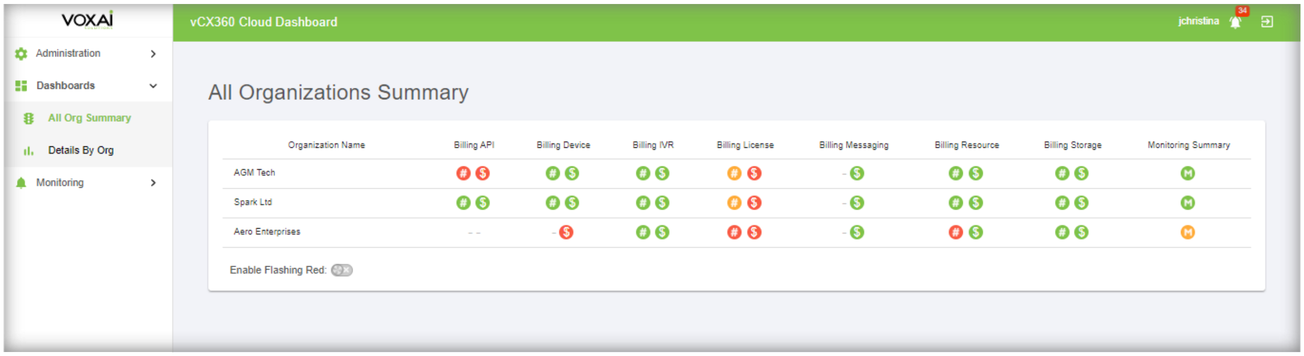



FIGURE: ALL ORG SUMMARY EXPLAINED

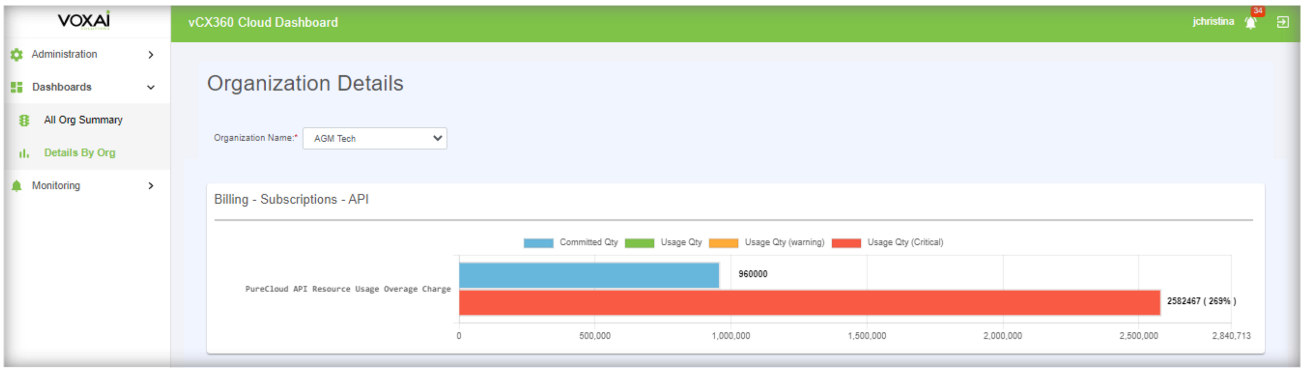
### 5.1.1 Example Scenarios

Let’s consider an organization “AGM Tech” in the below screenshot.




In the Billing API column, the icons are indicated in RED.

When the user clicks on the icon buttons, then it is redirected to the "Billing – Subscriptions - API" detailed graph that exists in the "Details By Org" section. Below is the screenshot of redirected page.




## 5.2 Details By Organization

This sub menu item displays detailed information on different aspects for an Organization.

On the top left of this page, there is a drop-down to select the organization. When user selects an organization then all the graphs with the details related to the selected organization are displayed.

Here is the list of graphs displayed in this page:

- Billing - Subscriptions grouped into Categories
  - API, Device, IVR, License, Messaging, Resource, Storage
  - Each category can have none to multiple charges.
  - These charges enable the user to view the performance based on Pre-Purchased or Committed items with actual usage. Mostly Prepay purchases have discounted pricing.
- Billing Charges - Current Snapshot
  - Displays Billing Charges as of last Billing Data collection from Genesys. Typically, as of that date the billing charges are implied.
- Trending Chart - Billing Category Totals

  - Trending for Category Totals show how charges trend group into different categories.
- Trending Chart for individual Billing Charges
  - If you need to know the charges driving up charges for a particular category, this section will allow drill down to individual charge.
- API Usage By OAuth Client
  - If API Usage is crossing the free bucket, this table provides insight into which OAuth Client is driving that usage high.

For a specific organization, if there is not data for a category then the respective graph or view is not displayed in this page, as there is no usage.

Also, for applicable charts, an option to display the legend is displayed on the chart. It is indicated by a button named “Show Legend”. When this button is enabled, the legend is displayed on the chart respectively.

### 5.2.1 Billing – Subscriptions

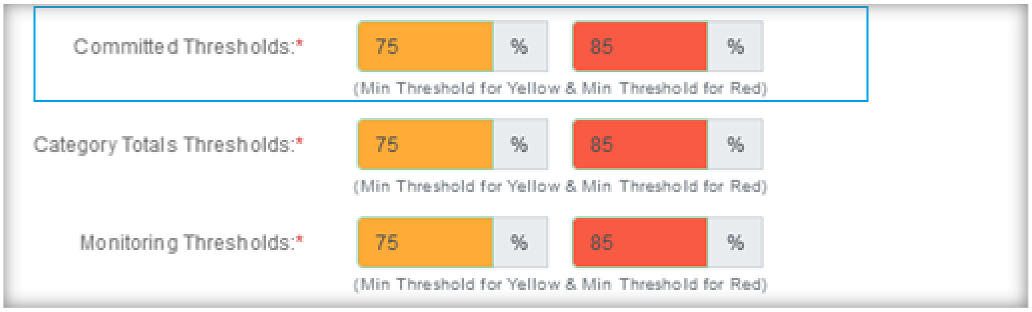
Part of Genesys Subscription model, any Organization can Pre-Purchase different items (say License, Seats, storage, events etc) and they have a discounted rate compared to OnDemand changes. For instance, “PureCloud 3 Concurrent User” can have a discounted rate of $140.00 (PrePay Price) and OnDemand Price could be $180.00. Each and every additional license used on top of Pre-Purchased ones would incur additional charge.  For any Organization size with growth, the actual used licenses could slow start to increase resulting in increased charges. If we have consistent increased usage, Organization can re-negotiate with Genesys for increased Pre-Purchased license if it makes sense.

Billing Charges - Current Snapshot

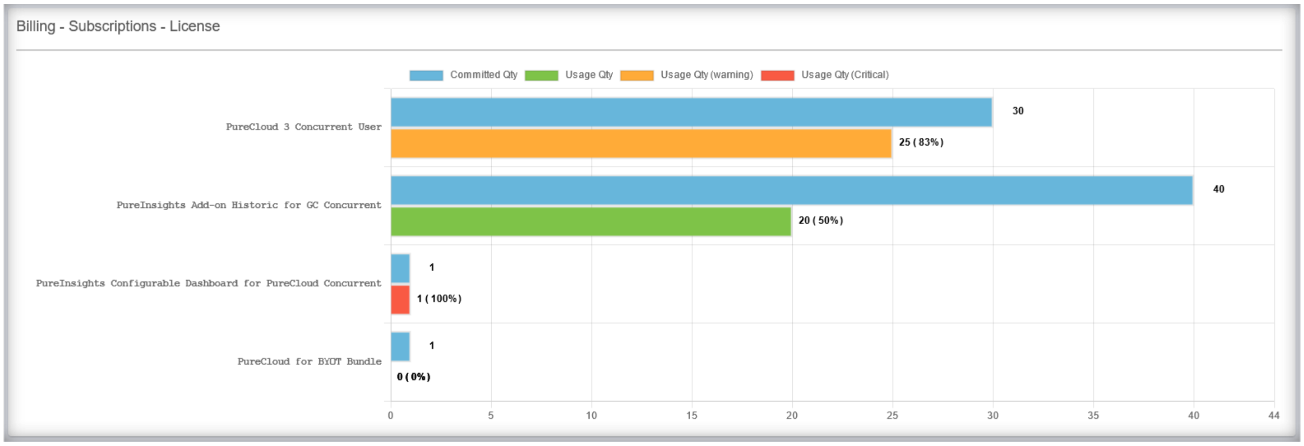
| Charge Name | Custom Group | Unit of Measure | Prepay Qty | Prepay Price | Prepay Charge | Usage Qty | Overage Price | Overage Charge | Total Charge |
|---|---|---|---|---|---|---|---|---|---|
| United States Short Code Set Up One ... | Messaging | number | | $ 0.00 | $ 0.00 | 0 | $ 813.00 | $ 0.00 | $ 0.00 |
| PureCloud 3 Concurrent User | License | seat | 30 | $ 140.00 | $ 4200.00 | 25 | $ 180.00 | $ 0.00 | $ 4200.00 |
| PureInsights Configurable Dashboard ... | License | license | 1 | $ 118.75 | $ 118.75 | 1 | $ 150.00 | $ 0.00 | $ 118.75 |
| SMS MRC Rate J | Messaging | number | | $ 0.00 | $ 0.00 | 0 | $ 93.75 | $ 0.00 | $ 0.00 |
| PureCloud BYOC Premises Virtual | Device | device | | $ 0.00 | $ 0.00 | 0 | $ 81.99 | $ 0.00 | $ 0.00 |
| SMS MRC Rate I | Messaging | number | | $ 0.00 | $ 0.00 | 0 | $ 35.00 | $ 0.00 | $ 0.00 |

These graphs in this section (different categories) provides quick insights into how we are doing with respect to Prepay/Committed items.

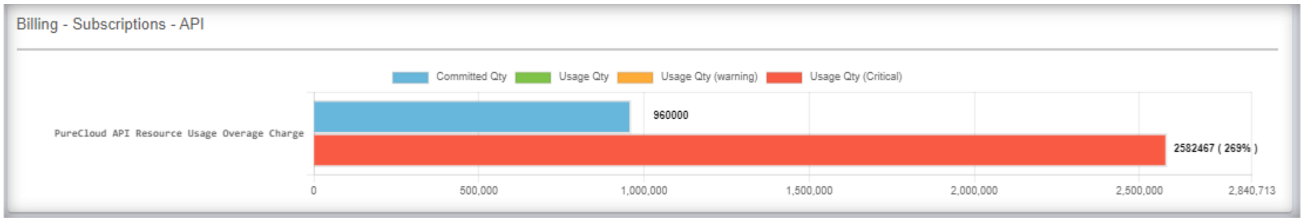
The BLUE bar represents the ***Committed Quantity*** and the bar below represents the current ***Usage Quantity***. The color of this bar is determined based on the thresholds we have defined for the Organization. Say for instance, in Organization settings, for Committed Thresholds, we provided Min Threshold for Yellow to be 75 and Min Threshold for Red to be 85. In the screenshot below Usage Quantity / Prepay Quantity * 100 = 269%. Since it > 85, it is showing in RED.



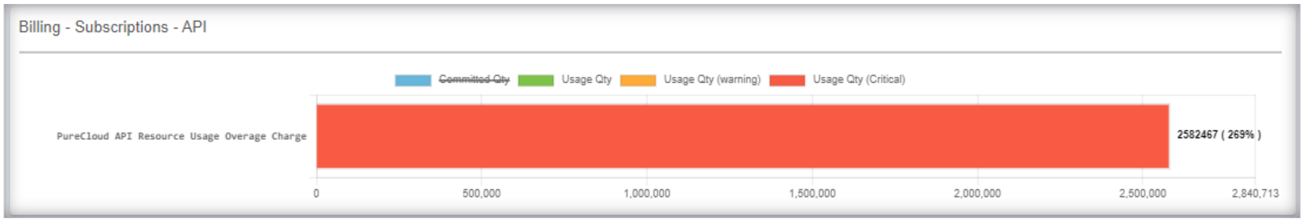

In the screenshot below, you can see that PureCloud 3 Concurrent User License item is show in yellow drawing our attention. Here almost 83% of the Prepaid licenses are used. On the other hand “PureInsights Add-On Historic for GC Concurrent” license is shown in Green color given we are only using 50% of Pre-Purchased limits.




Using Legend to Hide/Display Data:




To get granular insights, user can hide a specific detail by clicking on the item in the top legend. For example, in the above graph, if the user prefers to view only the Committed quantity, then the user can click on the "Committed Qty" on top of the graph. As shown below:




This section of Dashboard shows these charts where charges are grouped under following categories: API, Devices, IVR, License, Messaging, Resource and Storage.

### 5.2.2 Billing – Charges - Current Snapshot

This is the tabular representation of the Billing Charges based as of last time Billing Data is collected, typically every day. Please note that Total Charge shown in the table is just an indicator of effective changes for the month. This is because the Prepay change seen in the table is already paid upfront and would NOT be changed again this month. Also, kindly note that these changes are EXCLUDING ANY TAXES. The data in should be used to provide some insights rather than perceiving them as final changes.

Billing Charges - Current Snapshot

| Charge Name | Custom Group | Unit of Measure | Prepay Qty | Prepay Price | Prepay Charge | Usage Qty | Overage Price | Overage Charge | Total Charge |
|---|---|---|---|---|---|---|---|---|---|
| PureCloud Communicate Stand-alone ... | Device | phone | | $ 6.19 | $ 0.00 | 63 | $ 7.43 | $ 468.09 | $ 468.09 |
| BYOT Rate C | Resource | usage | 1 | $ 0.00 | $ 0.00 | 32495 | $ 0.01 | $ 162.47 | $ 162.47 |
| PureCloud for Mobile Office Add-On Co... | License | user | | $ 19.60 | $ 0.00 | 6 | $ 19.60 | $ 117.60 | $ 117.60 |
| SMS Outbound Rate A | Messaging | message | | $ 0.00 | $ 0.00 | 1882 | $ 0.01 | $ 18.82 | $ 18.82 |
| SMS Inbound Rate A | Messaging | message | | $ 0.00 | $ 0.00 | 1548 | $ 0.01 | $ 15.48 | $ 15.48 |
| SMS MRC Rate A | Messaging | number | | $ 0.00 | $ 0.00 | 3 | $ 1.25 | $ 3.75 | $ 3.75 |
| US MMS Inbound Per Message | Messaging | message | | $ 0.00 | $ 0.00 | 30 | $ 0.02 | $ 0.54 | $ 0.54 |
| SMS Outbound Rate G | Messaging | message | | $ 0.00 | $ 0.00 | 6 | $ 0.06 | $ 0.36 | $ 0.36 |
| SMS Outbound Rate L | Messaging | message | | $ 0.00 | $ 0.00 | 1 | $ 0.11 | $ 0.11 | $ 0.11 |
| PureCloud for Amazon Lex - Voice Invo... | License | seat | | $ 0.00 | $ 0.00 | 1 | $ 0.01 | $ 0.01 | $ 0.01 |

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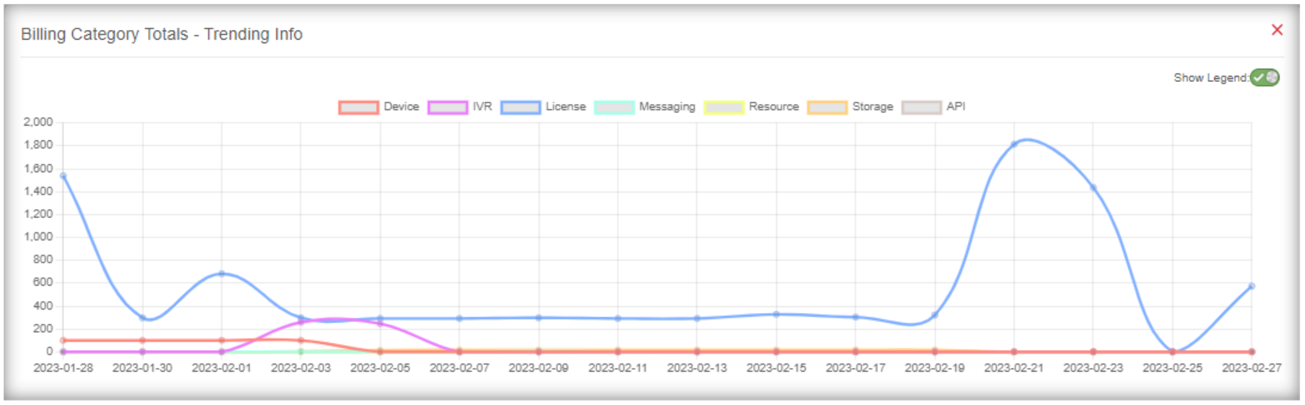
### 5.2.3 Billing – Category Totals - Trending Info

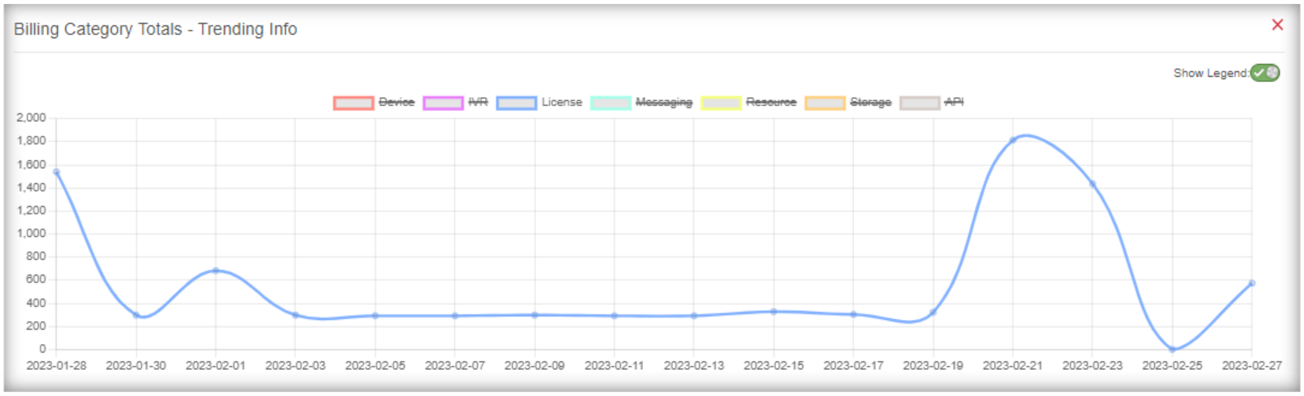
Here we can see the Trending Chart for Billing Charges grouped and totaled by categories.




Legend related to this chart will be displayed based on toggle button named "Show Legend".

User can hide a specific category from the view, to get granular insights of the remaining categories. This could be helpful when a scale is uneven due to a single high charge and rest of the charges are barely visible. User can also hover on the points to view the details at that specific point in the trend displayed.

Below is an example, where the view is filtered only for IVR category.



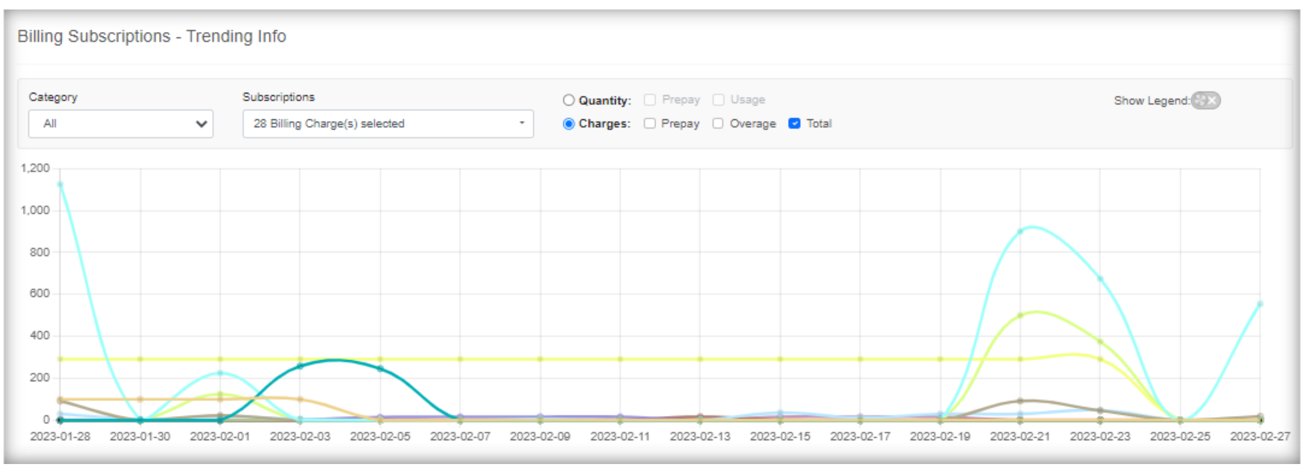

### 5.2.4 Billing – Subscriptions - Trending Info

This view provides Trending Chart / Historical view of changes at individual charge level. Users can view the trend information based on Quality or based on billing charges along with Category and subscription selection.

For trend based on billing charges, users can select the charge and filter the information as mentioned below:

- **Prepay** – Prepay charge which was already paid upfront
- **Overage** – These are the charges which are incurred for the usage of resources beyond the prepaid ones.
- **Total** – Total charges are notion of how much amount was spent on a given charge. This is calculated as Prepay Charge + Overage Charge.

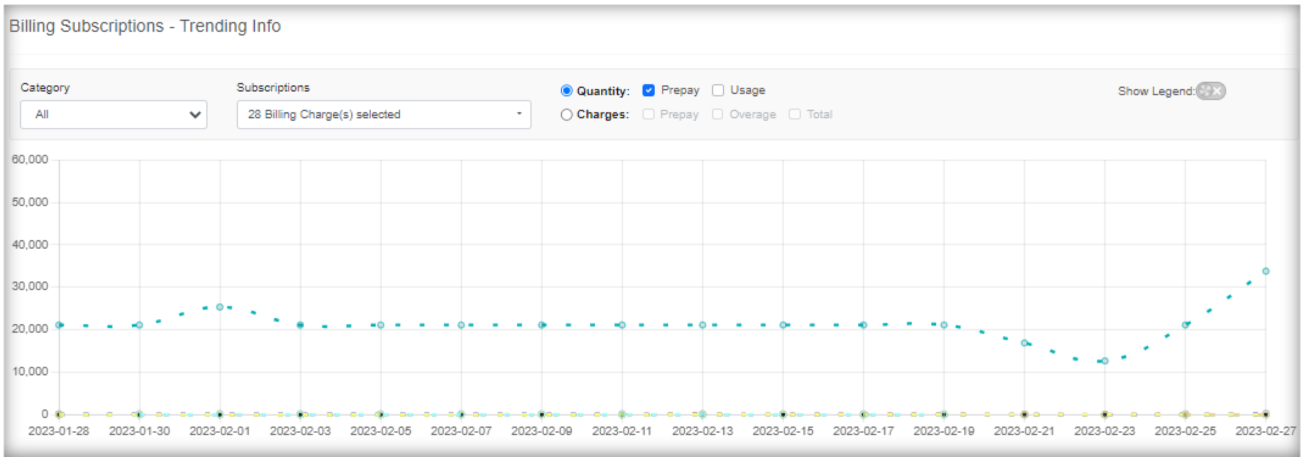
Here is a screenshot of the trend info displayed when Charge is selected:



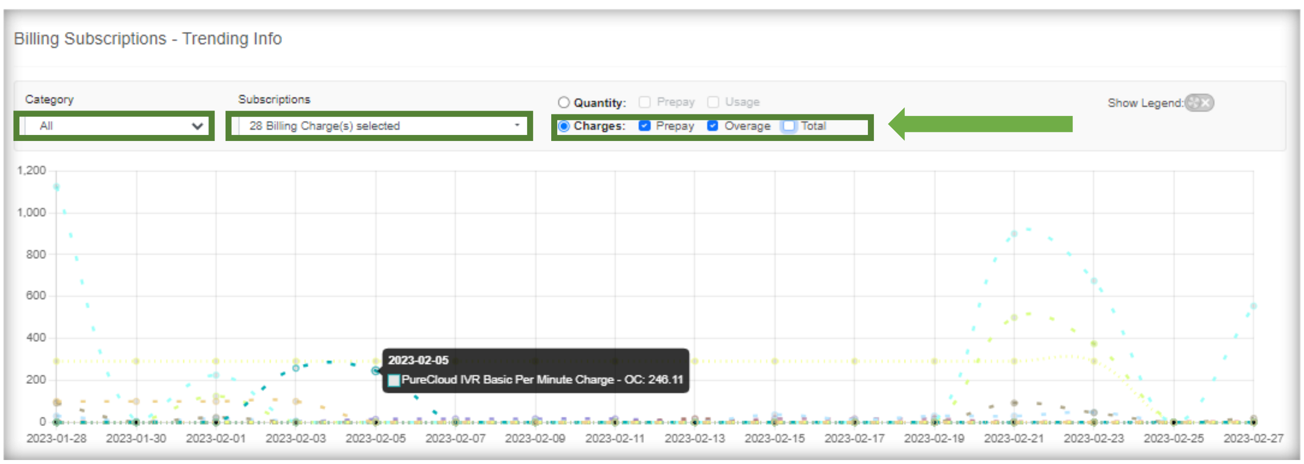

For trend based on quantity, users can select the quantity and filter the information as mentioned below:

- **Prepay** – Indicates the quantity for which charges are paid before usage, for the selected time period.
- **Usage** – Indicates the quantity which is actually used for the selected time period

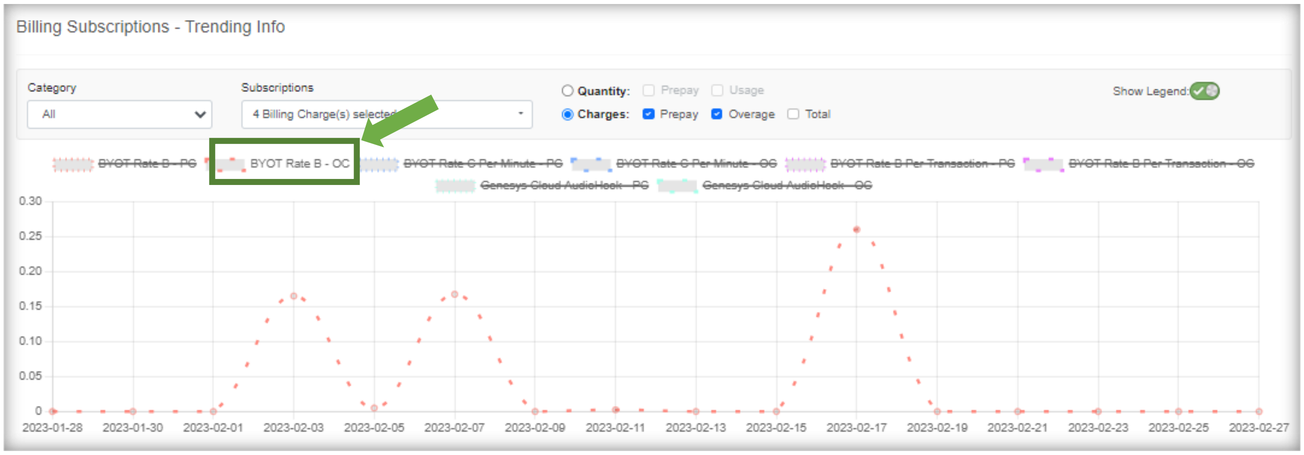
Here is a screenshot of the trend info displayed when Quantity is selected:




Below is an example of the trending info filtered:




For even further granularity, users can hide the products as shown below:

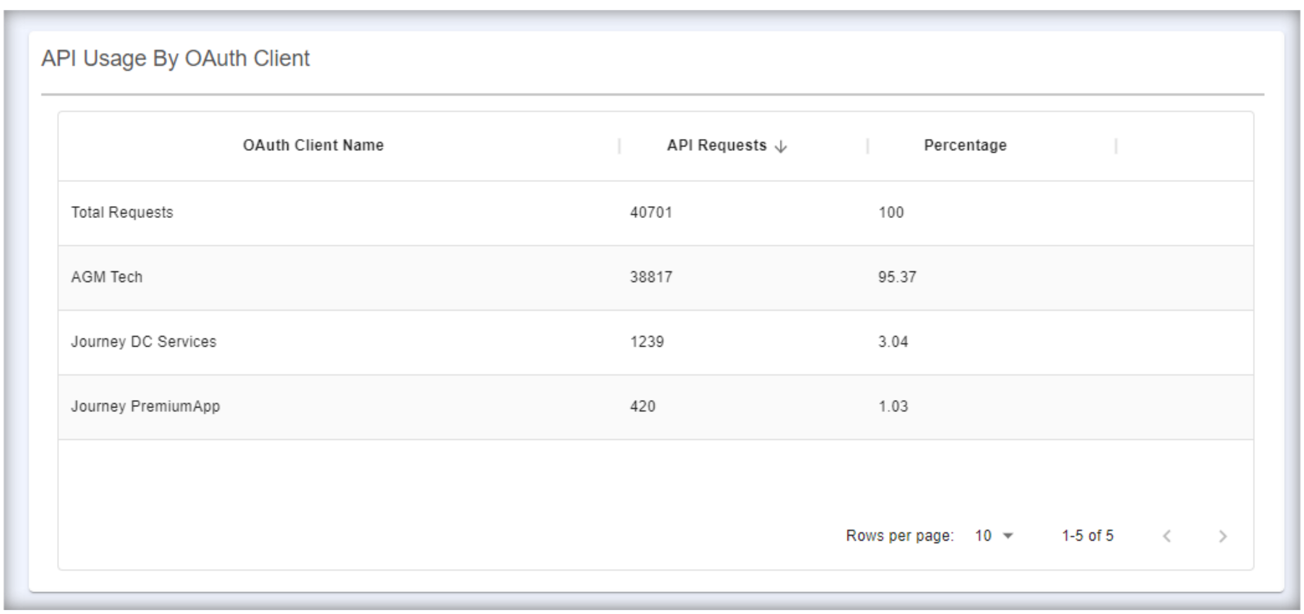



### 5.2.5 API Usage by OAuth Client

This is a tabular view that provides details about the API usage by a specific OAuth Client in the current cycle.

User can search for a specific client name, API requests or percentage of usage. For better view, pagination is also provided at the bottom right of the table.

API Requests column depicts the count of API requests made in this current cycle by a specific OAuth client.

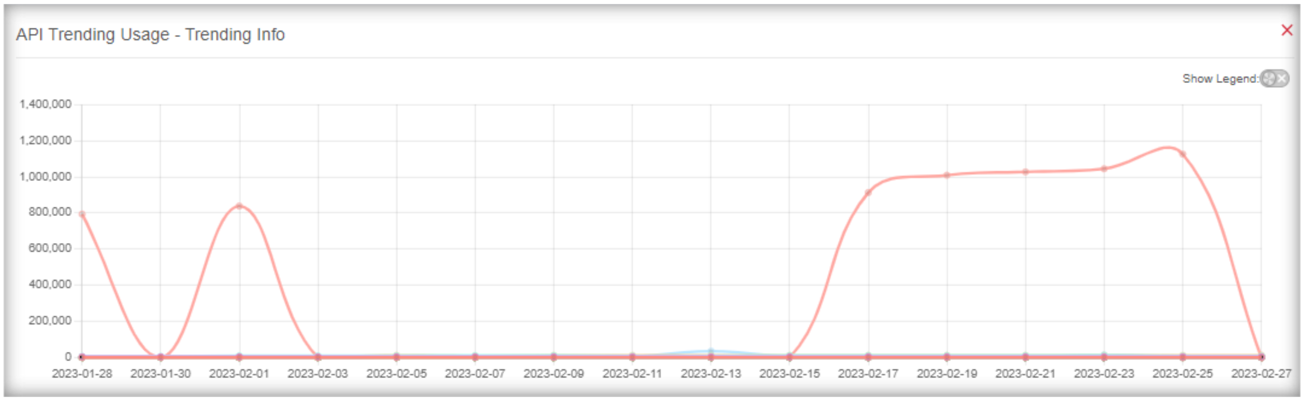

API Usage By OAuth Client

| OAuth Client Name | API Requests ↓ | Percentage |
|---|---|---|
| Total Requests | 40701 | 100 |
| AGM Tech | 38817 | 95.37 |
| Journey DC Services | 1239 | 3.04 |
| Journey PremiumApp | 420 | 1.03 |

Rows per page: 10 1-5 of 5

### 5.2.6 API Trending Usage - Trending Info

This trend chart displays the API usage of the selected organization in the selected time period. Legend related to this chart is displayed based on toggle button named “Show Legend”.




Likewise, user can view the updated trend by keeping only the necessary APIs in the legend.