Informiam Alert Management

Informiam Proactive Business Management

User Manual Release 3.3

Contents

Alert Management Overview

Informiam Contact Center Advisor and the Workforce Option provide a real-time display of contact center activity and workforce management for call centers throughout the domain. Predefined alerting conditions on applications, call types, and contact groups are established to display alerts on the dashboard, as well as notify designated contacts. With Informiam Alert Management, you may record the action taken to resolve one or more alert violations, as well as the results of that action. You can record each action in a separate report. The key action reports create a knowledgebase that will help identify repetitive patterns and resolve future violations more rapidly.

You can add key action reports on the Action Management page for alerts you can see based on your user permissions. The Action Management page is opened from either the map or the Alert Management tab.

The alerts on the map are only for the current day. Depending on the value defined for the Expired Alerts in Business/Technical Table (hours) (on the System Configuration page), it is possible that some expired alerts will not display in the Alerts table on the map. All alerts do display on the Alert Management tab.

From the Alert Management tab, you can open the Action Management page to add a key action report for one or more alerts. You must open the Action Management page from the Alert Management tab to maintain existing key action reports.

The Alert Management tab displays a table of alerts and a table of key action reports. You can determine the

- best action to resolve a violation
- key action reports for which you are responsible
- key action reports for one or more alerts
- the alerts for one or more key action reports

For more information about the Action Management page, see page 2.

For more information about the Alert Management tab, see page 6.

Action Management

From the map, you can add a key action report for one alert. From the Alert Management tab, you can add a key action report for multiple alerts, as well as edit and delete key action reports. For more information about the Alert Management tab, go to page 6.

The Action Management page includes four sections that expand and collapse:

- **Alerts**: the current values of the alert selected on the Contact Center Advisor or Workforce Option map or the Alert Management tab

- **Key Action Reports**: a table of the existing key action reports

- **Key Action Report Details**: the details of the key action report

- **Follow Up**: the results of the action taken and lessons learned

Only one Action Management page can be opened at a time. From the Action Management page, you can

- enter the details of the key action taken to resolve a rule violation. For more information, see "Adding a key action report from the map" on page 3 or "Adding a key action report from the Alert Management tab" on page 4.

- create a key action report with no alert. For more information, see "Adding a key action report with no alert" on page 8.

- modify a key action report from the Alert Management tab. For more information, see "Modifying a key action report" on page 5.

- delete a key action report from the Alerts Management tab. For more information, see "Deleting a key action report" on page 9.

The details of a key action report include:

- **Author** (display only): the user who creates the key action report

- **Responsible Assignee**: the contact who carries out the action. The default is the author's last name, first name, and e-mail address. In version 3.0, the responsible assignees are not notified when they are assigned to an action.

- **Creation Time/Date/Time Zone** (display only): the system time when the key action report is saved

- **Key Action Time/Date/Time Zone**: when the action was actually taken. The default is the creation time, date, and time zone.

- **Update Time/Date/Time Zone** (display only): the system time when the key action report is updated

- **Alert Cause**: the cause of the alert

- **Alert Cause Description** (optional): a description to elaborate on the selected alert cause

- **Key Action Taken**: the action taken to resolve the alert violation

- **Key Action Description** (optional): a description to elaborate on the selected key action taken

- **Results of Action Taken** (optional): a description for the result

- **Lessons Learned** (optional): a description for the lessons learned

- **Success Rating**: a rating for the success of the key action. Providing a value for the success rating indicates that the key action report is complete. The values are 3, 2, 1, 0, -1, -2, and -3; where 3 indicates the key action is successful, 0 indicates the key action had no effect, and -3 indicates the key action had a negative effect.

- **Success Time**: the amount of time it took for the action to have a successful impact, that is, the violation end time and date minus the key action start time and date, where the key action has a success rating of 1 or 2. The format is hh:mm:ss. If the violation end time and date are not available NA displays. If the start time of the key action is earlier than the end time of the violation, a negative value displays.

- **Primary Alert**: If the key action report is associated to an alert, the alert details are saved when the report is saved. If multiple alerts are associated, one of the alerts must be marked primary.

- **# of Associate Alerts**: the number of alerts associated to the key action report. This is particularly useful if you do not have permission to see all of the alerts associated to a key action report. If you do not have access to the primary alert, the primary alert values are not displayed.

Adding a key action report from the map

One alert in a key action report is designated as the primary alert. Adding a key action report for an alert from the map automatically flags the alert as primary. The primary alert values are saved at the time the key action report is saved so that if you view the key action report later, you can tell exactly the circumstances at that time. These values only display in the Key Action Reports table and never update.

To record the action taken to resolve an alert violation and the results of that action:

1. On the Map (Alerts) pane, either:

   a) In the carousel, double click on a tile for a call center.
   or
   b) From the All Alerts table, double click on an active or expired alert row.

   The Action Management page displays. The alert is automatically set as the primary alert. The default values display in the Author; Responsible Assignee; Creation Time/Date/Time Zone; and Key Action Time/Date/Time Zone fields.

   Note: When an alert is for a network call center and a skill group call center that share the application or call type, both the network call center and a skill group call center display an alert on the map. When you click on either tile, the summary indicates both call centers. The key action report will be associated with the alert associated with the selected tile.

2. Type the first few letters of the responsible assignee's last name and select a name. The last name, first name and e-mail address display.

3. Specify when the key action was performed in the Key Action Time, Date, and Time Zone fields.
   The time format is hh and mm using the 12-hour clock. The date format is MM/DD/YYYY or you can select from the Calendar icon. The default is the current system time, date and time zone of your server.

4. Either select a cause from the Cause drop-down field or type one in the Cause field. The cause name must be unique and is not case sensitive.

5. To suggest that the cause you typed in the Cause field should be available for selection in the future from the Cause drop-down field, select the "Add to List?" check box.
   The cause will display in the Causes table on the Administration | Alert Causes page for an administrator to approve.

6. Optionally, provide more details for the cause in the Alert Cause Description text box. An alert cause must be specified in order to enter a description. The text box limit is 256 characters.

7. Either select a key action from the Key Action Taken drop-down field or type one in the Key Action field. The key action name must be unique and is not case sensitive.

8. To suggest that the key action you typed in the Key Action Taken field should be available for selection in the future from the Key Action Taken drop-down field, select the "Add to List?" check box.
   The key action taken will display in the Key Actions Taken table on the Administration | Key Actions page for an administrator to approve.

9. Optionally, provide more details for the key action in the Key Action Taken Description text box.
   A key action must be specified in order to enter a description. The text box limit is 256 characters.

10. Type a description of the results of the action taken in the Results of Action Taken text box.
    Once the key action report is saved, the description cannot be edited. The text box limit is 256 characters.

11. Type a description of the positive or negative results of the action taken in the Lessons Learned text box.
    The text box limit is 256 characters.

12. To rate the success of the action taken, select a rating from the Success Rating drop-down field.
    The values are 3, 2, 1, 0, -1, -2, and -3; where 3 is the most effective, 1 is less effective, 0 has no effect, and -3 is detrimental (the action made the problem worse).

13. To save the key action report, click Save.
    The Action Management page closes and the dashboard displays.

Adding a key action report from the Alert Management tab

Sometimes an action resolves multiple alerts. From the Alerts Management tab, you can add a key action report for one or more alerts. One of the alerts must be designated as a primary alert. The primary alert values are saved at the time the key action report is saved so that if you view the key action report later, you can tell exactly the circumstances at that time. These values only display in the Key Action Reports table and never update.

To enter the details of the key action taken to resolve one or more rule violations:

1. From the Alerts Management tab, select the Alerts - Key Action Reports view.
   The Key Action Reports table displays on top.

2. Highlight one or more alerts in the Alerts pane.
   To highlight multiple alerts use Shift/Ctrl click.

3. Click NEW .
    The Action Management page displays. The selected alerts display in the Alerts section.

4. If this key action report is for multiple alerts, select the primary alert.
    Once the key action report is saved the primary alert cannot be changed.

5. Continue with Steps 2 to 12 of "Adding a key action report from the map" on page 3.

6. To save your information, click Save.
    The Action Management page closes and the Alert Management tab displays. The key action report displays in the Key Action Reports pane. The context is empty OR in the context of the selected alert(s).

Modifying a key action report

You can modify a key action report to make corrections or complete the Follow Up section. Only the key action and the result of action taken are not editable. When an existing key action report is opened, the alerts in the Alerts section display current values.

The Alerts section only displays alerts for which you have permission. If you do not have permission to see all of the alerts associated to the key action report, the number of associated alerts displays in the Key Action Reports table so you can tell exactly how many alerts are associated to each report. If you do not have access to the primary alert, the primary alert values are not displayed.

To modify the details of a key action report:

1. From the Alerts Management tab, select the Alerts - Key Action Reports view.
    The Key Action Reports table displays on top.

2. Select Edit (✐) for a key action report.
    The Action Management page displays the key action report details.

3. To remove an alert from a key action report, in the Alerts section clear the Assign to Key Action Report check box.

4. Continue with Steps 2 to 6, 8, 9, 11, and 12 of "Adding a key action report from the map" on page 3.

5. To save your information, click Save.
    The Action Management page closes and the Alert Management tab displays. The key action report displays and is highlighted in the Key Action Reports pane.

Alert Management tab

The Alert Management tab displays a table of key action reports and a table of alerts. The alerts display based on your user permissions and the time zone of your server. The key action reports display in the time zone selected by the author.

From the Alert Management tab, you can:

- assess the success of the actions and learn what action to take for similar alerts. For more information, see "Displaying the key action reports for an alert" on page 7 or "Displaying the key action reports for multiple alerts" on page 8.

- view the details of the alerts associated to a key action report. For more information, see "Displaying the alerts for a key action report" on page 8 or "Displaying the alerts for multiple key action reports" on page 8.

- open the Action Management page to enter the details of the key action taken to resolve one or more rule violations. For more information, see "Adding a key action report from the map" on page 3 or "Adding a key action report from the Alert Management tab" on page 4.

- open the Action Management page to display or edit a key action report. For more information, see "Modifying a key action report" on page 5.

- delete a key action report. For more information, see "Deleting a key action report" on page 9 or "Deleting multiple key action reports" on page 9.

- delete an alert from an existing key action report. For more information, see "Modifying a key action report" on page 5, step 3.

- filter the rows in either the Alerts pane or the Key Action Reports pane by date or text search. For more information, see "Filters" on page 9.

- clear the date filter in either the Alerts pane or the Key Action Reports pane by clicking Clear.

Key Action Reports table

The details of a key action report are described in Action Management on page 2.

Alerts table

The details of the Alerts table include:

- **Alert Type**: indicates the type of the alert as business (B) or technical (T)

- **Priority**: indicates the alert priority as 1 (displays red on the dashboard) or 2 (displays yellow on the dashboard)

- **Description**: the description of the problem. The values for a:

  - threshold violation are the metric name and metric value

  - technical alert is the text "Peripheral Off Line"

- **Subject**: The subject is what is affected. For a business alert, the subject is the name (or descriptive name, if available) of the application, call type, or contact group. For a technical alert, the subject is the name of the peripheral gateway.

- **Threshold Type**: Contact Group, Application, PG Offline
- **Alert Start Date/Time** (format: mm/dd/yyyy ##h:##m): when the alert started based on the Threshold Trigger Delay Rate which is defined on the System Configuration page.
- **Alert Duration** (format: ##h:##m): the duration of the alert from the time the alert started to the time the alert expired, or to the current time if the alert is still active.
- **Max Violation**: the highest or lowest value of the violation (depending on the rule). The maximum violation is the worst that the rule was violated. The maximum violation is from the start of the alert. For a technical alert, N/A displays.
- **Alert End Date/Time** (format: mm/dd/yyyy ##h:##m): when the alert expired
- **Active/Expired**: indicates if the alert is active or expired
- **Reporting Region**: the reporting region of the alert
- **Operating Unit**: the operating unit of the alert
- **Geographic Region**: the geographic region of the alert
- **Application Group**: the application group of the alert
- **Call Centers**: the call centers of the alert
- **Source System**: to differentiate one administration workstation database (AWDB) from another, for example, an application from one AWDB from the same-named application from a different AWDB.

View options

By default, the Key Action Reports table displays above the Alerts table and is filtered to the key action reports for the current day. The Alerts table is empty until you select a key action report. In other words, the lower table is empty until you select a row in the upper table. You can change the table orientation by selecting the View option:

- **Key Action Reports - Alerts**: (default view) displays the Key Action Reports table above the Alerts table.
- **Alerts - Key Action Reports**: displays the Alerts table above the Key Action Reports table.

Permissions

You can see all key action reports except those for which you do not have permission to see any of the associated alerts.

Note: Contacts, who are not users, cannot view or maintain key action reports. A contact may be a responsible assignee and thus require the author to notify them and update the key action report.

Displaying the key action reports for an alert

You can display the key action reports for an alert to assess the success of the actions and learn what action to take for similar alerts.

1. Select the view, Alerts - Key Action Reports.
   The Alerts table displays above the Key Action Reports table.

2. Select an alert row in the Alerts table.
   The Key Action Reports table displays only the actions for that alert.

Displaying the key action reports for multiple alerts

You can compare the key action reports for multiple alerts to assess the success of the actions and learn what actions to take for similar alerts.

1. Select the view, Alerts - Key Action Reports.
   The Alerts table displays above the Key Action Reports table.

2. Select multiple alert rows in the Alerts table using Ctrl/click for individual rows or Shift/click for contiguous rows.
   The Key Action Reports table displays the key action reports for the selected alerts.

Displaying the alerts for a key action report

You can view the details of the alerts associated to a key action report.

To display the actions for an alert:

1. Select the view, Key Action Reports - Alerts.
   The Key Action Reports table displays above the Alerts table.

2. Select a key action report row in the Key Action Reports table.
   The Alerts table displays only the alerts for that key action report.

Displaying the alerts for multiple key action reports

You can view the details of the alerts associated to multiple key action reports.

1. Select the view, Key Action Reports - Alerts.
   The Key Action Reports table displays above the Alerts table.

2. Select multiple key action report rows in the Key Action Reports table using Ctrl/click for individual rows or Shift/click for contiguous rows.
   The Alerts table displays the alerts for the selected key action reports.

Adding a key action report with no alert

From the Alert Management tab, you can add a key action report with no alert to record a preventative action.

1. Select a view, for example, Key Action Reports - Alerts.
   The Key Action Reports table displays above the Alerts table.

2. Click NEW for a key action report.
   The Action Management page displays.

3. Continue from Step 2 of "Adding a key action report from the map" on page 3.

Deleting a key action report

From the Alert Management tab, you can delete a key action report.

1. Select the view, Key Action Reports - Alerts.
   The Key Action Reports table displays above the Alerts table.

2. Select ❌ for a key action report.
   The Key Action Reports table refreshes.

Deleting multiple key action reports

From the Alert Management tab, you can delete multiple key action reports.

1. Select the view, Key Action Reports - Alerts.
   The Key Action Reports table displays above the Alerts table.

2. Select multiple key action report rows in the Key Action Reports table using Ctrl/click for individual rows or Shift/click for contiguous rows.

3. Click DELETE.
   The Key Action Reports table refreshes.

Filters

You can filter the rows in either the Alerts pane or the Key Action Reports pane by one of two date/time range filter options, as well as by a text search. Filtering refreshes only the table on top. After filtering, the table on the bottom displays no items until a row in the table is selected. For the text search, see "Searching for a row with text" on page 13.

The historical information always reflects the current hierarchy; for example, if an application was associated to the sales application group but was updated to the services application group, the values display for the services application group no matter which time interval.

The current status of the record always displays.

Filtering by the time scale (Option 1)

You can display data as it exists for the current day, the last 7 days, 30 days, or 90 days. The time scale defaults to today (Now). Now is the period that begins at 12:00 a.m. and ends at the last available 30 minutes.

If the time slider is set to the last 7 days on March 26, 2008 at 14:14, then the results are from March 19, 00:00 to March 25, 23:59.

Filtering by specifying dates (Option 2)

You can filter the Alerts table by specifying the start date/time and the expiration date/time; this filter includes alerts that were active within that window of time.

You can filter the key action reports by specifying the key action (start) date/time and the last update date/time; this filter includes key action reports that started OR were updated within that window of time.

Sorting the rows

In the Alerts table, the default sort order is ascending by the description. In the Key Action Reports table, the default sort order is ascending by the key action name. For more information, see "Sorting rows" on page 13.

Refreshing the data

The status of alerts may change frequently and other users may also be creating key action reports. You must click Refresh to update the Alerts and Key Action Reports table with the most up-to-date information. Refreshing applies to both tables. For more information, see "Refreshing the data in a table" on page 14.

Personalized settings

Logging in and out retains the selected Alerts - Key Action Reports view and date/time filter, as well as other settings. For more information, see "Persisting settings from session to session" on page 14.

Generic Actions

Informiam Contact Center Advisor and Workforce Option version 3.0 introduces a new and improved user interface. The new interface is used in the Alert Management module, on the Action Management page, and in the administration module on the Alert Causes page and Key Actions page. Changes to the user interface include:

- filtering rows in a table by text, a time scale, and a date filter

- paging through a table

- deleting items

- a column chooser for tables, including reordering columns

- persisting settings from session to session

The generic procedures include:

Adding a new item

To add a new item:

1. If the details section is not empty, click NEW .
   A blank form displays in the details section. No row is highlighted in the table.

2. Add the details.
   The Save button enables.

3. Click Save.
   The new item displays in the table highlighted, visible, and according to the currently selected sort order.

Editing an item

1. Click a row in the table.
   The row is highlighted. The details display in the details section.

2. Edit the details.
   The Save button enables.

3. Click Save.
   The edited item displays in the table highlighted, visible, and according to the currently selected sort order.

Deleting an item

You can delete an item from a table if it is not used elsewhere. Some items cannot be deleted, such as peripheral gateways, contact groups, metrics, applications, and skill groups. All other items can be deleted.

1. In the table, highlight a row.
   The details display in the details section.
   The **DELETE** (Ctrl D) enables.

2. Click **DELETE**.
   A confirmation dialog displays: "Do you want to delete the selected item?" with Yes/No buttons.

3. Click Yes. The item is removed from the table.
   Click No. The item remains until another row is selected or **NEW** is clicked.

Deleting multiple items

You can delete multiple items from a table if they are not used elsewhere. You can select all items in the currently displayed view to delete them.

1. Select multiple rows using Ctrl/click for individual rows or Shift/click for contiguous rows.
   The **DELETE** (Ctrl D) enables.

2. Click **DELETE**. A confirmation dialog displays: Do you want to delete the selected items? with Yes/No buttons.

3. Click Yes. The items are removed removed from the table.
   Click No. The deletion is cancelled.

Resetting the details for an item

1. To cancel the edits in the details section, click Reset.
   The last saved values redisplay.

Searching for a row with text

To focus on specific information in a table, search the rows of the table by text.

Search any text string in the table.

1. Type text in the Search field (Search).
   The Search field is not case sensitive and will search for characters within a word, for example, "Form" will result in rows with Informiam.

2. Click Search ( ).
   The table displays the rows with matching search criteria.

Displaying all rows in a table

To clear the search, click the View All icon ( ). All rows display.

Sorting rows

By default, the table is sorted alphabetically by the name of the item. To sort the rows in a table in ascending or descending order, click a column heading. You can only sort the table by a single column. Sorting applies to the entire table and sort arrows indicate the direction.

If a row in the table is edited and saved, the table refreshes, maintains the sort order, and the row is highlighted.

Choosing which columns display in a table

You can choose to display or hide any of the columns in a table; however, the name always displays.

To choose which columns to display in the table:

1. Click Column Chooser ( ).
   The Available Columns window opens.

2. Select or clear the items' check boxes. Selecting All selects all items in the next level.

3. Click Display Columns.
   The selected columns display in the table.
   or

   Click to cancel the edited column selections and close the Available Columns window.

Reordering columns

To reorder the columns, drag the column headings in the table

or

in the Available Columns window, select individual or multiple columns and click the Up or Down button then click Display Columns.

Refreshing the data in a table

To refresh the table, click Refresh (F5, 🔃). Refresh is always enabled. Refreshing preserves the

- relative sizes of the upper and lower panes
- selected columns
- column sizes and positions
- sort order
- scrolled position

Increasing and decreasing a column width

To adjust the width of individual columns, drag the edge of the column.

Resizing the panes

The splitter provides the ability to increase the size of a pane to view more columns than the default number of rows in a table or to view more easily an item with many details.

Move a splitter to resize the panes.

Persisting settings from session to session

Logging in and out retains the time interval, selected columns, column sequence, column sorting, column widths, row expansions, the location of the splitter, the grouping, the view, and the last selected module tab.

The preferences are stored with the users credentials.