GENESYS®

AN ALCATEL-LUCENT COMPANY

Contact Center Advisor

Genesys Performance Management Advisor™

User Manual Release 3.3

Contents

Viewing Call Data

Call Centers pane

▶ Selecting how the information is summarized and displayed in the organizational hierarchy (**Grouping**):

- by reporting region then by call centers then by application groups
- by reporting region then by application groups then by call centers
- by geographic region then by call centers then by application groups
- by geographic region then by application groups then by call centers
- by operating unit then by call centers then by application groups
- by operating unit then by application groups then by call centers.

▶ Selecting the **Interval** of time for the accumulation of data in the Call Centers pane and Applications pane. Point-in-time metrics display for any selected time interval. The values are calculated since the last system refresh.

- Now: rolling 5-minute window that is updated every 20 seconds.
- 30 Min: the values are calculated on the cumulative average or sum for the interval since the most recent even half hour, e.g., 09:00, 15:30, 22:00. This interval is from 0 to 30 minutes long.
- Today: the values are calculated on the cumulative average or sum for the current calendar day.

▶ If the rollups indicate that the applications should be included in the rollup then:

- The metric values at the highest level of the grouping summarize the second level.
- The metric values at the second level of the grouping summarize the grouping at the lowest level.
- The metric values at the lowest level of the grouping summarize the application values.

▶ Summaries for metric values are either:

- **Counts**: Counts are summed, for example, the number of calls offered, number of calls abandoned, and calls in queue.
- **Values**: Values take the minimum or maximum that is appropriate for that metric, for example, the longest time in queue.
- **Calculated values**: Calculated values are calculated at the aggregate by first summing the components of the calculation, then performing the calculation. Examples of calculated value metrics are average handle time, service level %, abandoned %, and average handle time.

▶ If calls offered and calls handled are zero, the applications defined with zero suppress turned on do not display in the Applications pane ▶ Expanding the regions in the Call Centers pane: select the ▶ icons. The selected row remains highlighted until you select another row.

▶ Displaying the applications in an application **call center** or call types associated with a call type **call center** in the Applications pane: select the information icon (ⓘ) beside a call center. Selecting a skill group call center displays the applications associated with the skill groups associated with the skill group call center. If the call center is at level three in a grouping, then the applications are filtered by the application group at level two.

▶ Displaying the applications or call types associated with an **application group** in the Applications pane: select the information icon (ⓘ) beside an application group. The applications are filtered by the call center at level two in the grouping.

▶ Displaying the skill groups associated with a **call center** in the Skill Groups pane: select the information icon (ⓘ) beside a call center. If the call center is at level three in a grouping, then the applications are filtered by the application group at level two.

▶ Widen and shorten a metric column: right click on a vertical line between metrics and drag.
▶ Displaying a metric description in a tooltip: place the mouse pointer over a metric column header.

▶ Changing the size of the panes to focus on information in a particular pane (to the exclusion of other areas of the dashboard): drag the splitter (✛) located in the center of the four panes in any direction. The vertical splitter increases and decreases the size between the Call Centers and Applications panes on the left and the Alert Map and Skill Groups panes on the right. The horizontal splitter increases and decreases the size between the Call Centers and Alert Map panes on the top and the Applications and Skill Groups panes on the bottom. The relative sizes are saved when you log out and back in.

▶ The open and close times of call centers represent the official time for active data analysis. During non-operational hours, summaries that draw data from the call centers (such as regional or application summaries) are calculated without that information. During non-operational hours, the call center displays gray in the Call Centers pane. It is also hidden from the map unless an active alert exists. Once the alert expires, the call center is hidden; however, the expired alert continues to display in the All Alerts table.

Applications and Skill Groups panes

▶ Highlighting the relationship between applications and skill groups:

- in the lower-left pane, select an application.

- in the lower-right pane, select a skill group.

▶ Displaying the technical name for an application or skill group: If provided, the descriptive name for the application displays in the pane. A visual indicator attached to a descriptive name indicates a technical name. To display the technical name, put your cursor over the descriptive name.

▶ Widen and shorten the width of the metric columns: right click on a vertical line between the metrics and drag left or right.
▶ Displaying a metric description in a tooltip: put the mouse pointer above a metric column header.

▶ Sorting a column in ascending or descending order: click on the header of the respective column. The table can only be sorted by a single column.

▶ The Skill Groups pane always displays real-time values. Select the Now time interval in the Call Centers pane to accurately compare the values.

Note: The violation colors in the Applications pane determine the violation colors in the Call Centers pane. In other words, if all of the violations for a metric in the Applications pane are yellow then the violation color for the metric for that call center in the Call Centers pane is also yellow. If only one violation for a metric in the Applications pane is red then the violation color for the metric for that call center in the Call Centers pane is red. Although a red violation in that Call Centers pane may look misleading when the value is in the yellow range of the threshold rule, the goal of the color is to call attention to the violation for the application.

Metric Graphing

You can display metric graphs in order to monitor trends from the Contact Centers pane and the Applications pane. Your administrator selects the metrics that can be graphed as well as the type of graph (either bar or line graph).

When first opened, each graph displays values with timestamps at most two hours in the past. The time period continues to grow while the graph is displayed. If the graph is closed and re-opened, the display begins with the default fixed period of data.

Missing or unavailable data for any part of the graph is represented by gaps in the graph. If an application metric becomes undisplayable for any reason, the gap grows as it updates, and in two hours will not show any values when first opened.

The metric values are displayed to the same precision used for display on the dashboard. A percentage for which the value displayed on the dashboard was '100+', the value is 100, to the correct precision.

▶ Displaying a graph of a 5 Min/Now metric: highlight a contact center, application group, application, or call type, select the metric and click .

▶ Selecting an individual data point on the graph displays the metric name, value, and time period in a tooltip.

▶ Focusing on any part of the data displayed: slide the bar below the graph. The selected set of data is highlighted in white. The selection can be expanded or contracted.

▶ Resizing the graph window. The graph is horizontally and vertically scaled based on the data.

Viewing Alerts

▶ To view hidden portions of the international map, click the map and use the arrow keys.

▶ To zoom the map in or out, click the map and use the + and – keys.

▶ Switching between the alert views (**Technical**, **Business**, **Both T & B** and **View All Alerts**): select the corresponding button at the top of the Map pane. When you select a button, the status indicator changes color: gray for no alerts, red, and yellow. The highest priority sets the color.

▶ To make alerts more noticeable by blinking, turn on the High Alert toggle (⊡).

Technical, Business, Both T & B views

The names in white type have active alerts, the ones in gray do not. The tile of the alert currently in view is highlighted.

▶ Displaying the call center name: put your cursor over a call center.

▶ Displaying alert details from the map for a call center on the current day: click the red or yellow dot representing the call center. The carousel displays the violation description, subject, start time and duration of the alert.

▶ Automatically cycling through each alert of all call centers: click the Auto button [icon]. The default setting is to scroll automatically.

▶ Automatically cycling through each alert of a single call center, click the second button [icon].

▶ Manually displaying each call center with alerts: click the Manual button [icon] and click a call center in white text.

▶ Displaying another alert in the same call center: click an alert tile.

View All Alerts view

The All Alerts view, which is available from the Business, Technical, and Both T & B views, lists the manual and automated alerts for application and call type call centers on the current date. The skill group call center associated to the call type call center with an alert does not display. The pane is divided into active and expired alerts. A system administrator defines how long expired alerts display by specifying the number of hours since the alert first occurred.

▶ Sorting the columns in ascending or descending order: click on the header of the respective column. The table can only be sorted by a single column.

▶ Closing the View All Alerts list: click the Close button.

▶ Displaying expired alerts: click the Expired ⬇ button.

▶ Hiding the expired alerts: click the Expired ⬆ button.

Resource Management

With Resource Management you can change the skills, skill levels, and status of agents, as well as notify the affected parties of the actions by e-mail. The changes are published to the Genesys Operational systems for immediate impact on contact center operations.

To access Resource Management, your user's profile must have the Resource Management check box selected on the Administration | Users page. The Resource Management check box is available if it is installed and either the Contact Center Advisor or Workforce Advisor check boxes are selected. When selected, the Resource Management icons display on Contact Center Advisor and Workforce Advisor.

Selecting the Agents to Manage

Resource Management is opened from Contact Center Advisor or Workforce Advisor. The agents listed in Resource Management are those in the skill groups which are associated with the rows selected in Contact Center Advisor or Workforce Advisor within the selected grouping. You cannot select rows across panes; in other words, you cannot select a row in the Call Centers pane *and* a row in the Applications pane.

The metrics of a skill group are used to calculate the metrics for aggregating objects (that is, application groups, regions, call centers) in the Call Centers table; consequently, the agents of a skill group will display in Resource Management even if you do not have permission to see the associated call center or application group.

If an associated skill group is configured to not display on the dashboard but is included in the rollups of metrics, the agents will still display in Resource Management. An agent will not display if the metrics of the selected object are inactive, not included in the rollup, or not assigned to an application group or region.

To select agents from

- the Call Centers pane, see "Selecting agents from the Call Centers pane" on page 6.

- the Applications or Contact Groups pane, see "Selecting agents from the Applications or Contact Groups pane" on page 7.

- the Skill Groups pane, see "Selecting agents from the Skill Groups pane" on page 8.

Selecting agents from the Call Centers pane

From the Call Centers pane, you can only select a single row to launch Resource Management.

For example, in Figure 1, if you select the Boston call center from the Call Centers pane, Resource Management will display the agents that belong to the skill groups, New_CC_Accts, Close_CC_Accts, New_Bank_Accts, and Close_Bank_Accts that belong to the applications, Credit Cards and Banking and the Consumer application group.
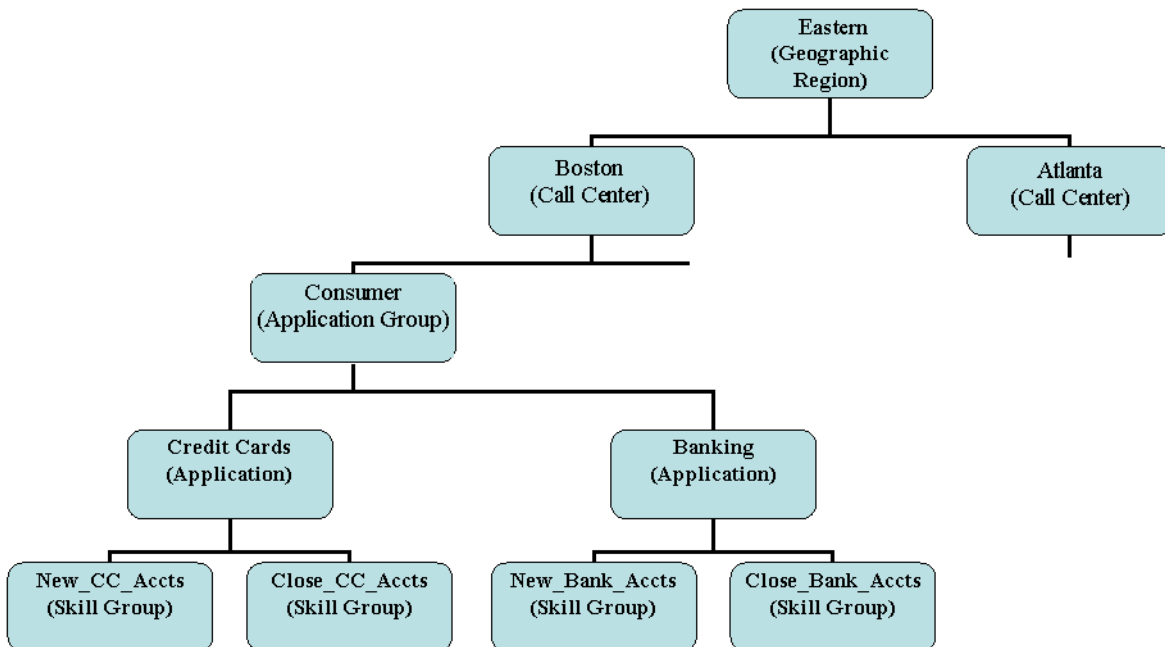
Figure 1: Enterprise relationships

To launch Resource Management:

1. Select a single row in the Call Centers pane.

   The Resource Management icon (🖼) becomes available.

2. Click the Resource Management icon.
   Resource Management opens and the agents associated with the skill groups within that grouping display.

Selecting agents from the Applications or Contact Groups pane

From the Applications or Contact Groups pane, you can select one or more rows. When you select a row, the skill groups associated with the application or contact group are highlighted in the Skill Groups pane. If multiple applications or contact groups are selected, the skill groups highlighted in the Skill Groups pane are those associated with the application or contact group that was selected last. The last selected application or contact group is identified by a blue border and a darker shade.

For example, in Figure 1, if you select "Credit Cards" from the Applications pane, Resource Management will display the agents that are associated with the skill groups associated with "New_CC_Accts" *and* "Close_CC_Accts".

To launch Resource Management:

1. Select one or more rows in the Applications or Contact Groups pane.

   The Resource Management icon (🖼) becomes available.

2. Click the Resource Management icon.
   Resource Management opens and the agents associated the skill groups associated with the applications or contact groups within the selected grouping display.

Selecting agents from the Skill Groups pane

From the Skill Groups pane, you can select one or more rows. When you select a row the applications or contact groups associated with the skill group are highlighted in the Applications or Contact Groups pane. If multiple skill groups are selected, the applications or contact groups highlighted in the Applications or Contact Groups pane are those associated with the skill group that was selected last. The last selected skill group is identified by a blue border and a darker shade.

Note: You cannot select the Totals and Averages row.

For example, in Figure 1, if you select the New_CC_Accts skill group, Resource Management will display the agents that belong to that skill group.

To launch Resource Management:

1. From the Skills Groups pane, select one or more rows.
   The Resource Management icon () becomes available.

2. Click the Resource Management icon.
   Resource Management opens and the agents associated with the agent group(s) backing the selected skill group(s) display (a skill group is an agent group segmented by a filter).

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.

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 10.

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 3.3, 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 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 24-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.

Customizing the Dashboard

▶ Selecting which metrics display:

1. Click the Columns buttons.

2. Highlight the metrics in the Available Metrics list.
   To select multiple metrics, hold the Ctrl key and select the metrics.

3. Click the right arrow to move the metrics to the Displayed Metrics list.

4. To rearrange the sequence of the metric display, highlight a metric and click the up or down arrow.

5. To save, click Apply.
   The Metrics Selection page closes.
   To reset the original setting, click Reset.

General

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

▶ When the denominator of a metric is zero or the data is not available, the dashboard displays N/A.

▶ If a metric's value cannot ever be supplied by the data source, a dash (-) is displayed in its place.

▶ When a call center is closed or the values for a region or application group are all zeros, the row is grayed out. The ability to expand (▶) is disabled. Any item that is expanded and then turns suppressed is contracted. If an information icon (ⓘ) had been selected and the bottom two grids populated, when the same item becomes suppressed the information in the bottom two grids remains as is until you select an unsuppressed row.

▶ A data connectivity indicator changes from green to red if a data source has not updated within a configured timeframe. Identified individuals will be notified by e-mail when an alert is triggered. An administrator can go to the System Administration page to see which data source is causing the problem and take corrective action.

▶ The last update time indicates when the data was last refreshed.

▶ Stopping the data from updating: click the Pause button (⏸). The button changes to ▶ and the update status indicator change to yellow. The data resumes updating if you select a new hierarchy grouping.

▶ Resume updating the data: click the Play button (▶). The button changes to ⏸, the update status indicator changes to green, and the real-time updates resume.

▶ The update status indicator in the top-left corner changes to red (▬▬) when disconnected from the server/receiving no updates due to system failure.

▶ Your administrator may have set up an Advisor tab with an external Website. You must have permission to use it. Depending on the Website, when you switch to another Advisor tab and return to it, you may have to log in to its Home page again.

Installing the Informiam Browser

To install the Informiam Browser:

1. With Microsoft Internet Explorer, open http://home.informiam.local.
    The installation automatically begins.

2. If prompted, accept the installation of the ActiveX Control signed by Informiam (Figure 1).
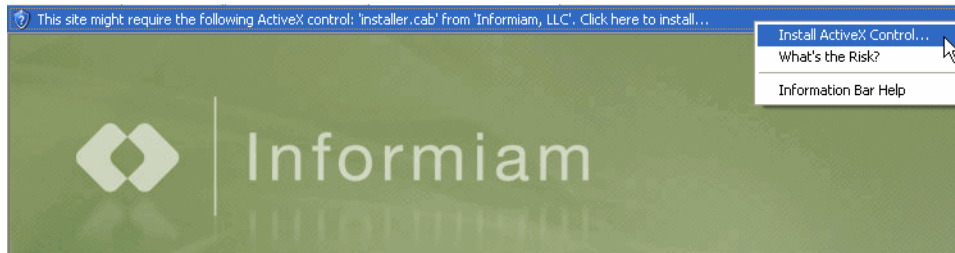

Figure 1: ActiveX Control

3. When prompted, click Install (Figure 2).
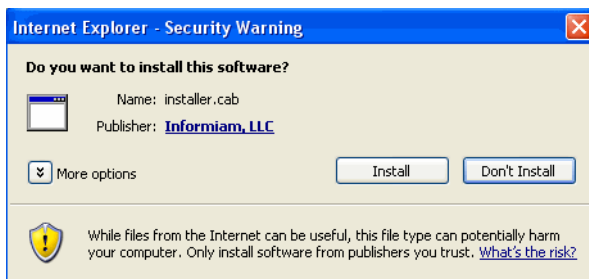   The Login page displays.

Figure 2: Install Security Warning

4. If there are errors during installation, open Windows Task Manager | Processes and end any XULRunner processes (e.g., xulrunner.exe) that are running by selecting the process and clicking End Task.

Uninstalling the Informiam Browser

Uninstall the Informiam Browser if there is a new version available.

To uninstall:

1. Go to Control Panel | Add or Remove Programs.

2. Highlight Informiam 1.0.0 and click Change/Remove.

3. To accept, click Yes.
    The current version of the Informiam Browser is removed.

4. Go to the directory C:\Documents and Settings\[USERNAME]\Application Data\Informiam LLC and delete the Enterprise Advisor folder.