GENESYS®

AN ALCATEL-LUCENT COMPANY

Frontline Advisor™

Administration User Manual Release 3.3

Genesys Performance Management Advisor™

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Contents

Overview

The Frontline Advisor™ Administration Console (Figure 1) is for users with the admin role to add or update thresholds and rules for a specific set of metrics, as well as define system-level settings.

Note: For 3.3, Frontline Advisor admininstrators must also have access to the Administration module in Contact Center Advisor .

Thresholds and rules continuously evaluate metrics, issue alerts, and help to focus the attention of supervisors onto the most important issues effecting their agents' performance and behavior. Each threshold checks one measured value at a point in time and triggers when the value falls within a pre-set range. Rules add another layer of sophistication by calling trigger functions that do more than simple range checking at points in time. Rules can count events throughout an interval of time, which allows them to trigger on the frequency of events.

Thresholds and rules should be aimed at highlighting significant situations and be very purposeful. Ideally, the number of alerts should be low: one or two per agent per day would lead to very effective coaching. Rules could monitor only one or two types of situations a week. Then the rules could be changed to tighten the triggering numbers in a future week (to "raise the bar"). For a suggested coaching strategy see "Appendix C: Tailoring a Coaching Strategy" on page 43.

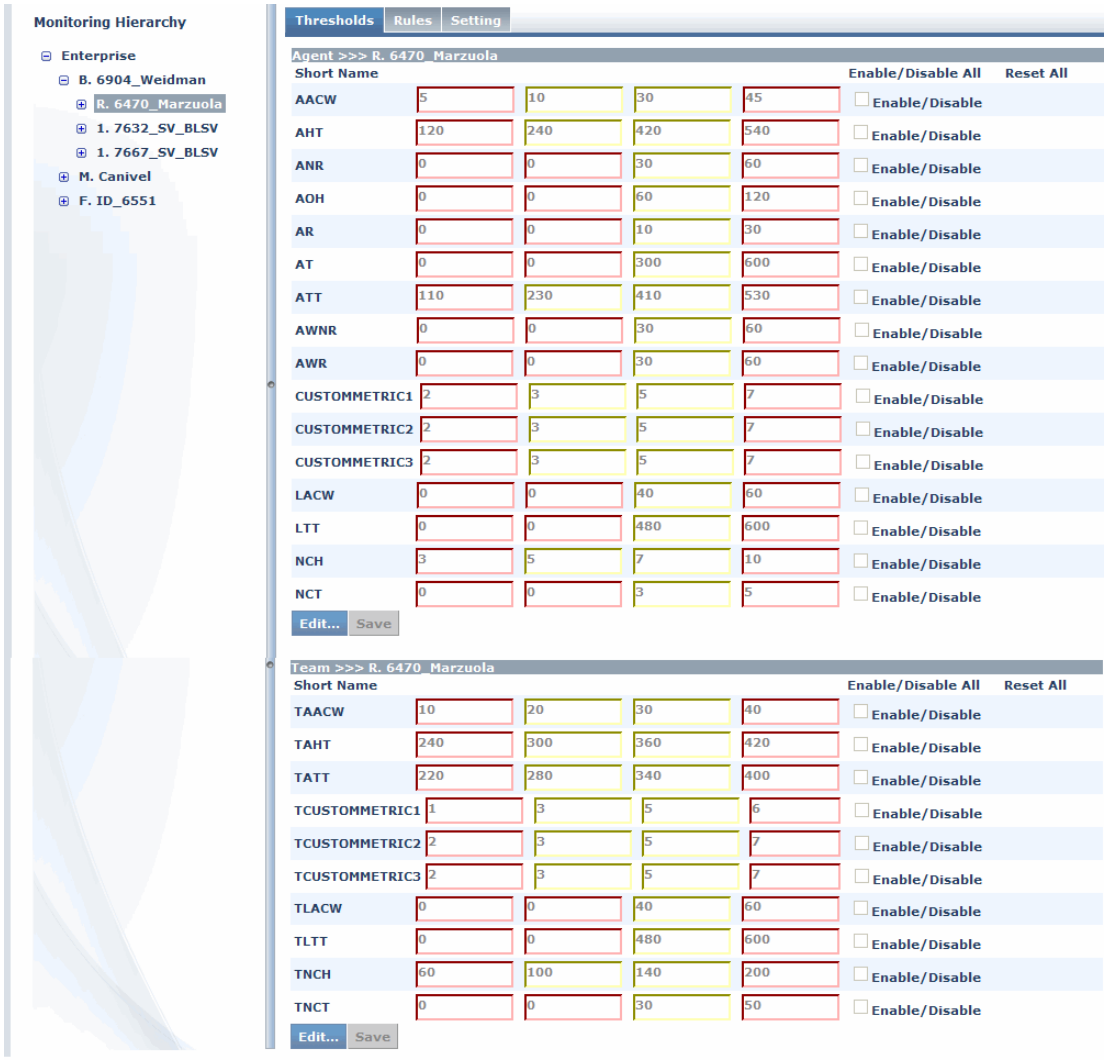

Figure 1: Administration Console

When a threshold is exceeded, the triggered threshold changes the appropriate text to red. When a rule is triggered, the rule creates an alert and posts it to the Supervisor Console. The status is visually represented:

- Red indicates at least one critical alert.
- Grey (on the Frontline Advisor and Agent Advisor) indicates the agent is not logged into the ACD.

Threshold violations are visable at all levels of the hierarchy, not just at the supervisor and agent levels. The actual violation is highlighted in a solid color and the rolled up violation is highlighted in a shaded color. Rule alerts roll up through all levels of the hierarchy; the value that rolls up is the count of uncleared alerts. This visibility provides a view of the overall performance for managers, directors, and vice presidents.

The Administration Console validates the threshold and rule values, eliminating typing mistakes and logical errors. When the threshold and rule definitions for all of the teams are

complete, you save them to Frontline Advisor. The active thresholds and rules are available on the Frontline Advisor and Agent Advisor.

Monitoring Hierachy Overview

A sample monitoring hierarchy, called the Acme monitoring hierarchy, has nine teams of nineteen agents in a five-level hierarchy (Figure 2). The Acme monitoring hierarchy will be used to further explain the concepts of:

- Inheritance
- Enable/Disable
- Override values

This section provides an overview of these concepts. For a detailed example of the monitoring hierarchy and modifying thresholds and rules, see “Appendix A: Acme Monitoring Hierachy” on page 25. If the monitoring hierarchy is new to you, we recommend reading Appendix A and then coming back to this section.

The monitoring hierarchy defines how agents are grouped, how groups are grouped, and so on, until there is just one all-encompassing group at the top. The monitoring hierarchy also shows which people can monitor which groups or teams in Frontline Advisor.

Note: Groups may be referred to as “nodes” and the monitoring hierarchy as “tree.”

You may define your own Monitoring Hierarchy. For more information, see “Appendix B: Defining Your Monitoring Hierarchy” on page 29.

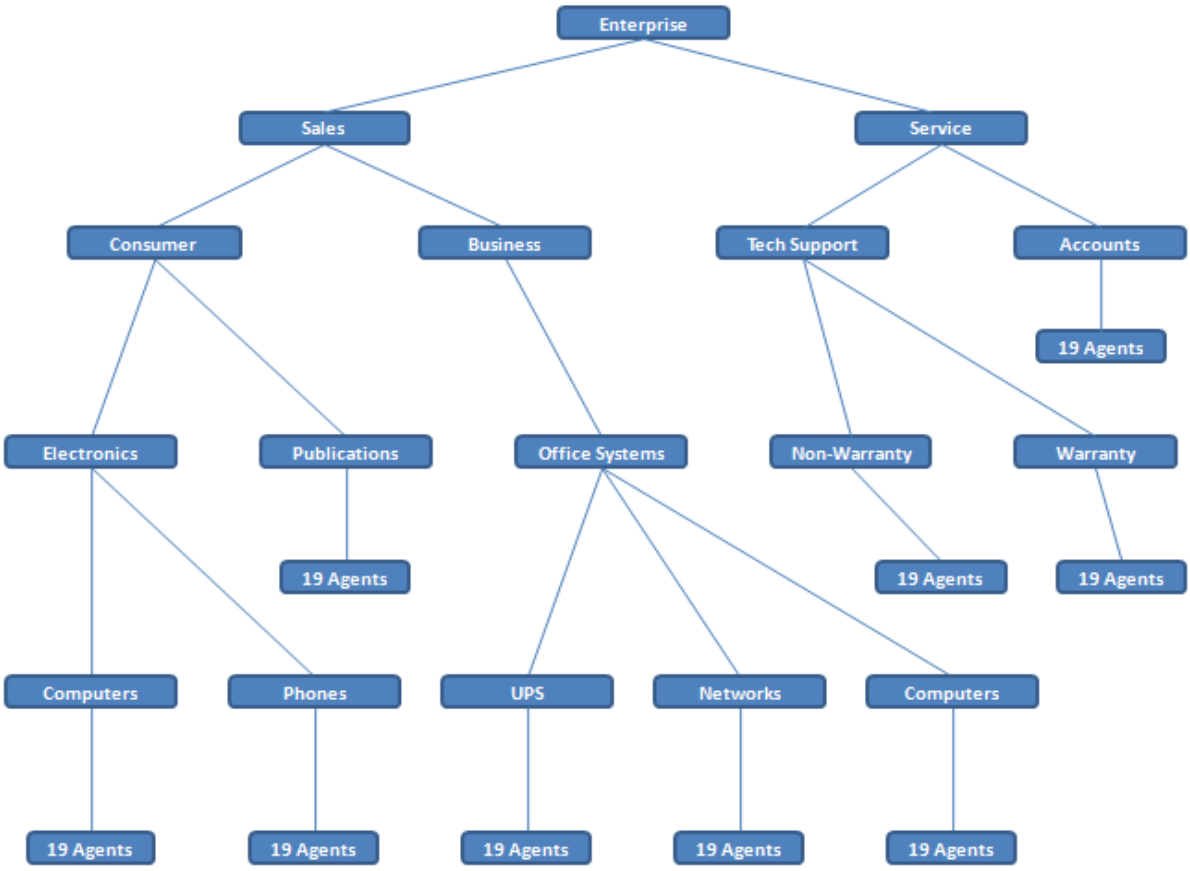

Figure 2: Acme Monitoring Hierarchy

Inheritance

Inheritance is the mechanism by which values higher in the tree are passed down to lower levels of the tree. A simple example is where the Phones node inherits the value of 300 from the Enterprise node (Figure 3). For a detailed example, see “Inheritance Example” on page 26.

The inheritance of values stored in rules work exactly the same as for thresholds. Inheritance behaves the same, enabled/disabled behaves the same, and override values behave the same. The agent’s values determine the status and trigger the alerts.

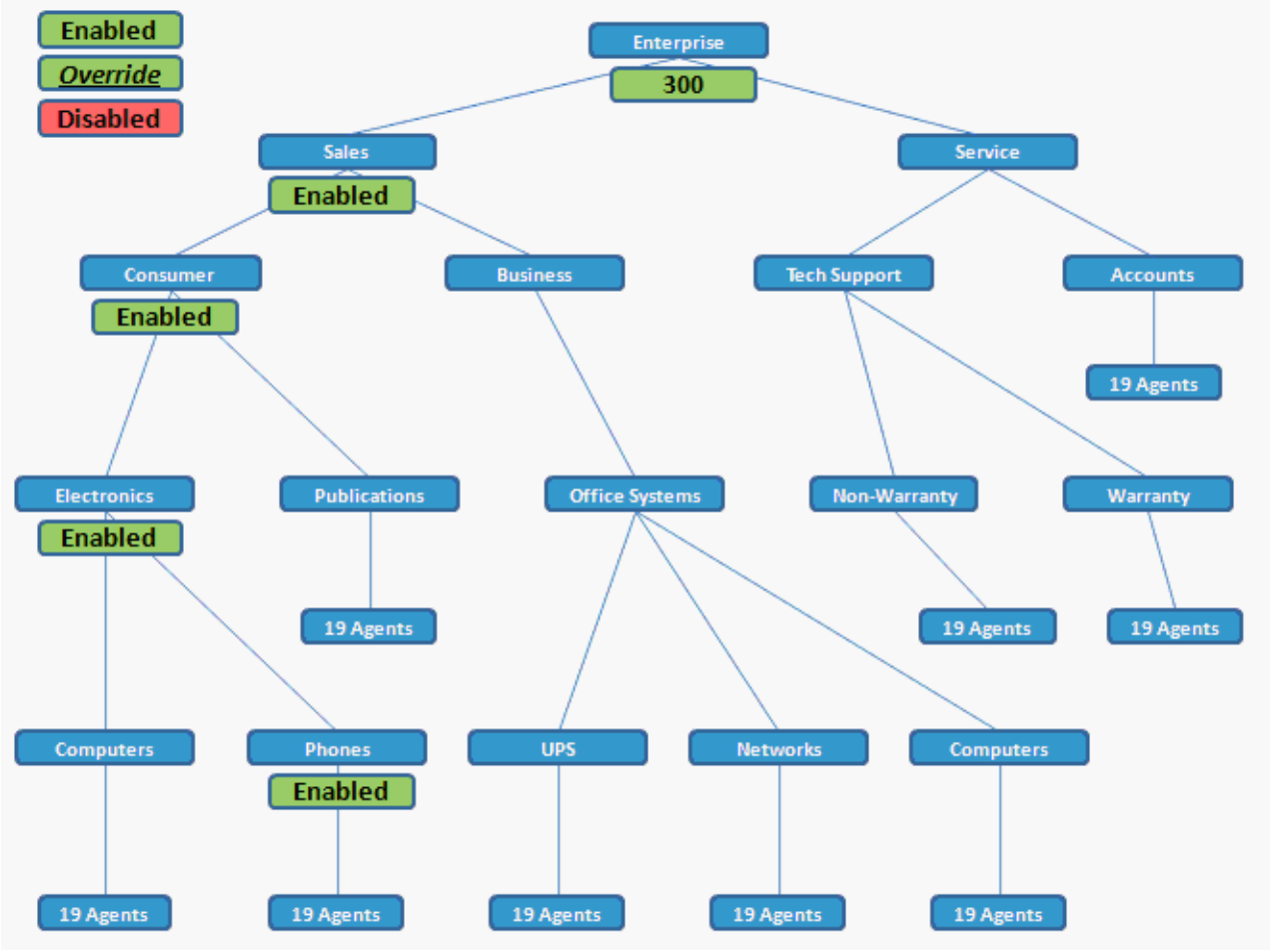

Figure 3: Phones Node

Enabling, Disabling, and Overriding Thresholds and Rules

By default the global thresholds and rules are disabled.

If a threshold or rule is disabled at a team level, then it is disabled for all agents on that team. The nodes underneath will inherit from the closest enabled ancestor. You can enable a threshold or rule for an individual agent even if it is disabled at the team level or higher.

If a threshold or rule is disabled at an agent level, then it is disabled for only that agent. Since there are no nodes under an agent, it affects only that agent.

Navigating the Monitoring Hierarchy

The Monitoring Hierarchy navigator is used to navigate to the area where thresholds and rules need to be viewed or modified (Figure 4). The Monitoring Hierarchy navigator lists a hierarchy of the managers, supervisors, teams, and agents imported from an external datasource.

Once your monitoring hierarchy is defined (“Appendix B: Defining Your Monitoring Hierarchy” on page 29) and imported, you maintain authorization to Frontline Advisor and Agent Advisor users in the Administration component of Contact Center Advisor. You can expand the hierarchy from managers down to agents, see “Expanding and collapsing hierarchies” on page 21.

Note: For 3.3, Frontline Advisor admininstrators must also have access to the Administration module in Contact Center Advisor.

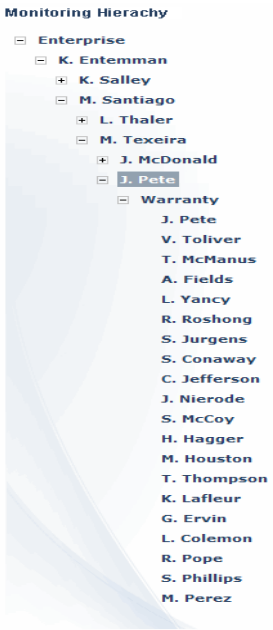

Figure 4: Monitoring Hierarchy Navigator

Defining the critical, warning, and acceptable conditions for each metric

The Thresholds tab (Figure 5) allows you to define the critical and acceptable conditions for the metrics. The standard installation provides the monitoring hierarchy with default values for all agent and team thresholds; however, you should review and change the values accordingly. An agent threshold takes precedence over the team threshold. A team threshold takes precedence over the global threshold. Each section lists the display name and the description of the metrics.

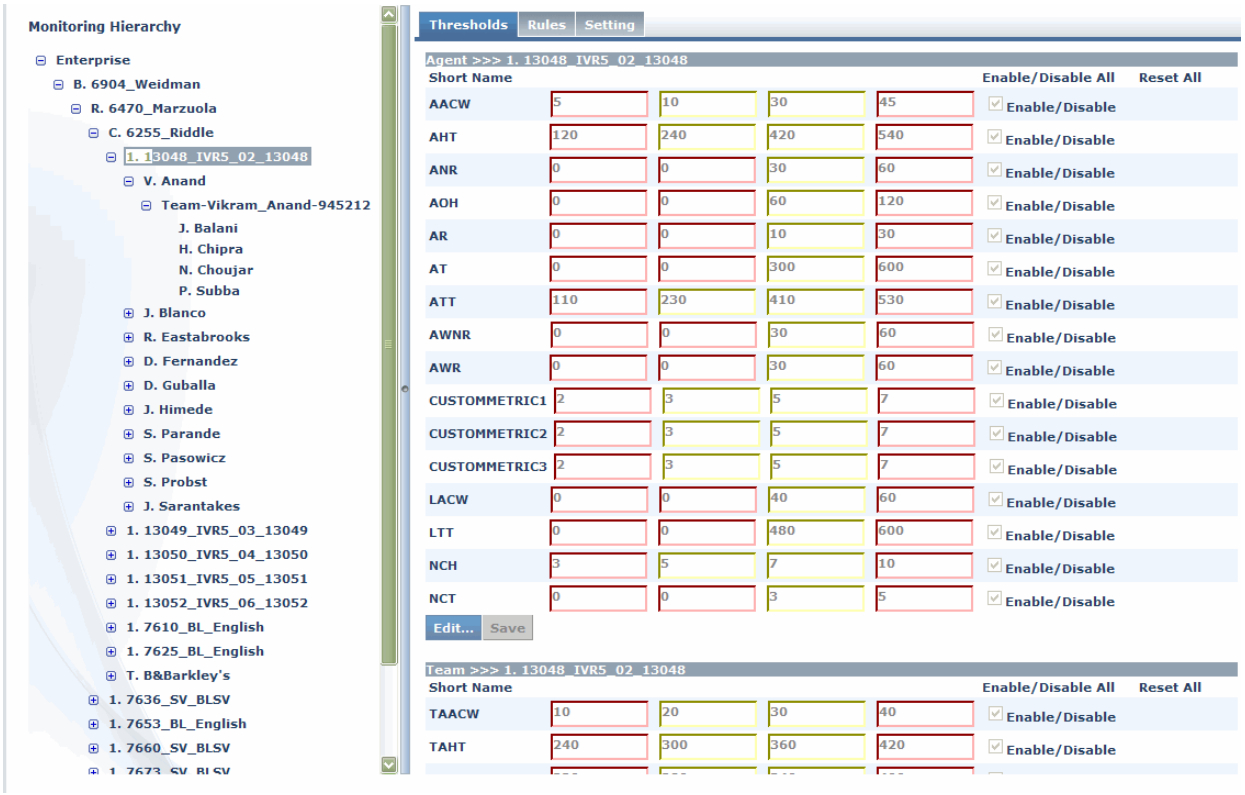

Figure 5: Thresholds tab

The following table lists the short and long names of the threshold metrics. On the Thresholds tab, tooltips display the full name.

Agent Thresholds		Team Thresholds	
AACW	AvgWrapTime	TAACW	AvgWrapTime
AAHT	AvgHandleTime	TAHT	AvgHandleTime
ANR	NotReady	TATT	AvgTalkTime
AOH	AgentOnHold	TLACW	LongestWrap
AR	AgentReady	TLTT	LongestCall
AT	TalkTime	TNCH	CallsHandled
ATT	AvgTalkTime	TNCT	CallsTransferred
AWNR	WorkNotReady		
AWR	WorkReady		
LACW	LongestWrap		
LTT	LongestCall		
NCH	CallsHandled		
NCT	CallsTransferred		

Threshold Types

You can configure four types of thresholds. Depending on the metric, a value may be acceptable above or below a certain value. When thresholds trigger, they highlight cells in the Manager or Agent Console. The four text boxes are colored to provide a visual cue for the status (Figure 6). The red bars are mandatory, while the yellow text box is optional (and may be replaced by a red text box). The colors change depending on the values you type. Red indicates a critical value range. Yellow indicates a warning value range. In general, if a metric value is:

greater than	the value in the 4th text box			then the value is critical high (red).
greater than	the value in the 3rd text box	and less than or equal to	the value in the 4th text box	then the value is warning high (yellow).
greater than or equal to	the value in the 2nd text box	and less than or equal to	the value in the 3rd text box	then the value is acceptable.
greater than or equal to	the value in the 1st text box	and less than	the value in the 2nd text box	then the value is warning low (yellow).
less than	the value in the 1st text box			then the value is critical low (red).

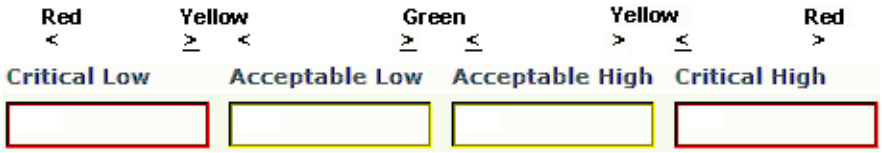

Figure 6: Threshold bar

Here are three examples. The system setting for how often the metrics are calculated (that is, the performance calculation interval) is 10 minutes for the purposes of these examples. For an average of 3-minute calls, handling 2 or more calls but less than or equal to 5 calls is acceptable. Handling 1 call but less than 2 calls (that is, two five-minute phone calls) is yellow. Handling less than 1 call is red. Handling more than 5 calls but less than or equal to 8 calls (that is, the calls are too short) is yellow. And handling more than 8 calls (that is, short-calling) is red (Figure 7).

Figure 7: Threshold is acceptable between two values

In the example in Figure 8, handling 2 or more calls but less than or equal to 5 calls is acceptable. Handling 1 call triggers a warning (yellow). Handling less than 1 call or more than 5 calls is a critical (red).

Figure 8: Threshold without a high yellow warning

In the example in Figure 9, handling 1 or more calls but less than or equal to 5 calls is acceptable. Handling more than 5 calls but less than or equal to 8 calls triggers a warning (yellow). Handling less than 1 call or more than 8 calls is a critical (red).

Figure 9: Threshold without a low yellow warning

Viewing thresholds

To view threshold values in another level of the monitoring hierarchy:

1. Select the Thresholds tab.
   The thresholds display based on the last selected level.
2. Select a level in the Monitoring Hierarchy navigator.
   The thresholds for the selected level display in the pane on the right. The name of the selected level displays in the title bar.

Example

The Enterprise (top node) displays default values (Figure 10). The default values for the Average Handle Time (AHT) threshold for the Enterprise node are 120, 240, 420, and 540. See “Threshold Types” on page 9 for an explanation of what the four values mean. The critical high value for AHT is 540 (seconds). This means that the Enterprise node stores a value of 540 for critical high AHT.

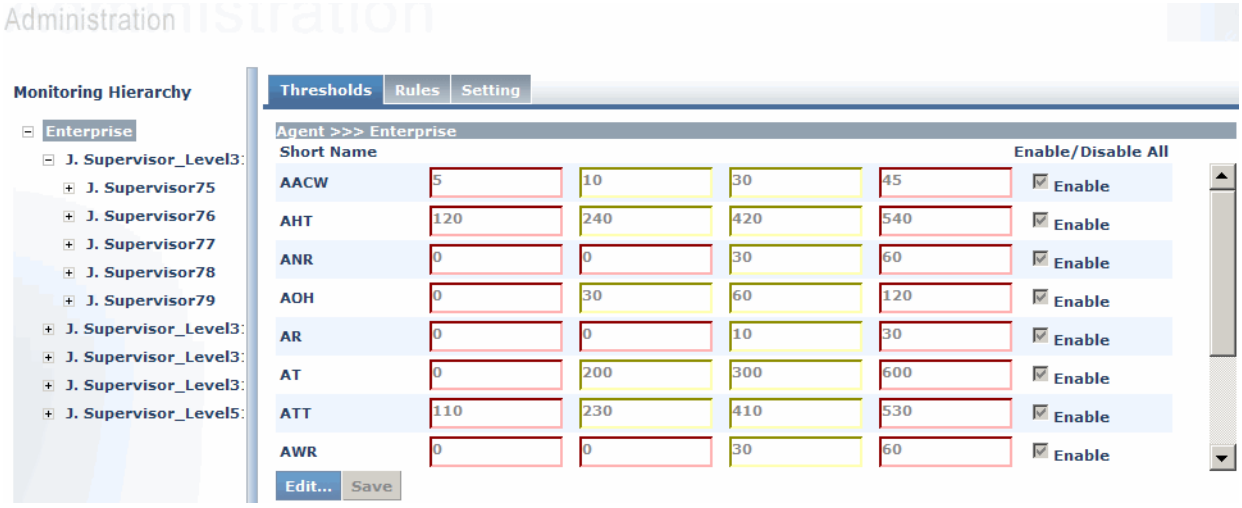

Figure 10: Enterprise level of the Thresholds tab

Conway is a monitor of the Consumers node. Navigate from the threshold values of the Enterprise node, monitored by Entemman, to those of the Consumers node, monitored by Conway by clicking on Conway in the Monitoring Hierarchy navigator (Figure 11).

Figure 11: Inherit critical high AHT, 540

As displayed in Figure 11, Conway inherits the value of 540 (for Critical High AHT) from the Enterprise node.

Disable/Override All Thresholds

To disable or override all thresholds at once, click Enable/Disable All.

Defining a Threshold

Default values for thresholds are provided on installation; however, you can modify them at any level. To distinguish between the default values and edited values, edited values display in boldface and italicized. Inherited values are in regular font. In edit mode, you can display the default value in a tooltip by moving the cursor over an edited value. For more information, see “Tooltips” on page 20.

When you add a team or agent, each threshold is enabled and inherited from the closest enabled ancestor.

To define a threshold:

1. Select the Thresholds tab (Figure 5).
   The thresholds for the last selected level display.
2. To define thresholds, select a level in the Monitoring Hierarchy navigator.
   The thresholds and the title bar for the selected level display.
   Note: If any text field or check box is changed and you select a new level, a message displays requesting you to save or discard the changes.
3. Click Edit.
   The fields and Save button enable. The Edit button changes to a Cancel button.
4. Type values in one or more text boxes.
   The edited values display in boldface and italicized.
   Note: The values must increment (or remain the same) from left to right. Only positive integer numbers are allowed, that is, no letters or blank spaces.
   If an invalid value is entered, an alert message box displays when the cursor moves off the field.
5. To activate the threshold, select the Enabled checkbox or
   to deactivitate the threshold, clear the Enabled checkbox.
6. To save all of the changes to the thresholds, click Save.
   A confirmation message displays. If any errors are detected through validation, an alert message displays.

Example

Suppose that you want to store an override value of 600 at the node that Conway monitors, that is, the Consumer node. To enter an override value, click the Edit button to enter the edit mode (Figure 11). Type a value of 600 for Critical High AHT (Figure 12). Then click the Save button. The override value of 600 now displays at the Conway (Consumer) node in italic font, and a slightly larger font than the other (inherited) values (Figure 12). Note that the node has been set to enable.

From now on, if nothing else changes, the Conway/Consumer node and all nodes in that subtree (which are enabled and do not have an override value) will inherit a value of 600 for critical high AHT.

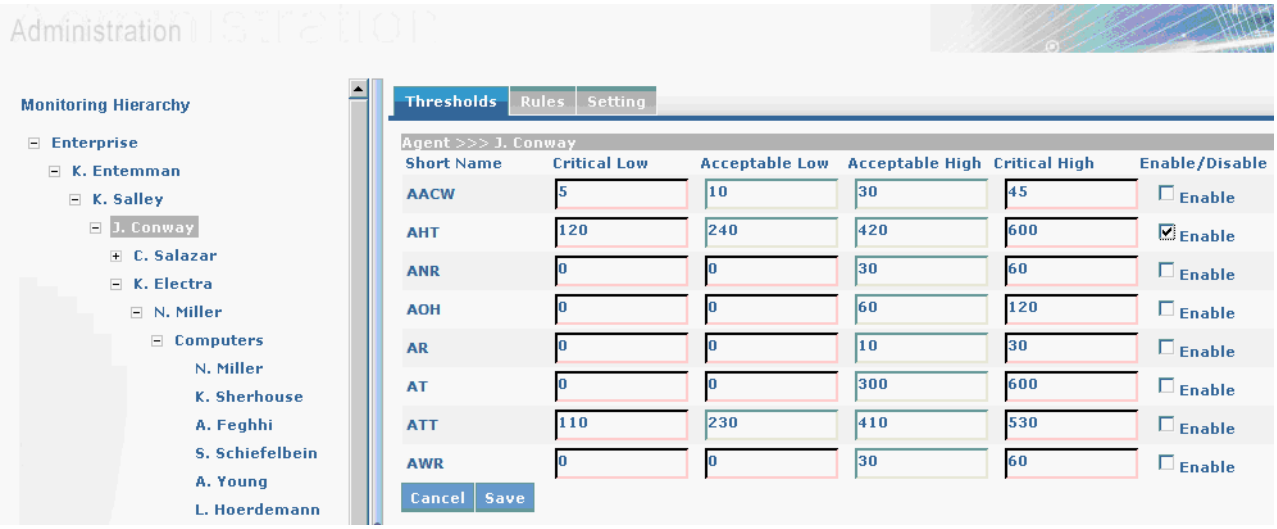

Figure 12: Override critical high AHT, 600

Cancel

To discard any changes made and revert the contents of the Thresholds tab to the last values saved to the database, click Cancel.

Defining the conditions that monitor agent statistics

The Rules tab (Figure 13) allows you to define the conditions that will continuously monitor the agents' statistics, such as short calling. If the conditions of a rule are met an alert is issued. The installation provides default values; however, you should review and change them accordingly. You can modify them at the team or agent level. An agent rule takes precedence over the team rule. A team rule takes precedence over the global rule. Rules evaluate and trigger on agent metrics, but not for team metrics.

To distinguish between the default values and edited values, edited values display in boldface and italicized.

Figure 13: Rules tab

The agent rule metrics are:

- Handle Time Duration
- Wrap Time Duration
- Count of Holds
- Count of Transfers

Each rule may include a:

- **Rule descriptor**: fixed text that describes the rule, for example, “Set of agents has”
- **Rule operator**: less than (<), greater than (>)
- **Rule operator value**: only positive integers are allowed, that is, no letters or blank spaces.
- **Filter descriptor**: fixed text that describes the filter, for example, “Calls handled which are”
- **Rule filter operator**: greater than or equal to 20, greater than or equal to 45, greater than or equal to 480; 1-10,1-20, or 1-300.
- **Rule filter value**: only positive integers are allowed, that is, no letters or blank spaces.
- **Time Interval**: the frequency in which the rule evaluates the metrics. The default values include 5, 10, 20, 30, 40, and 60; however, they can be changed.
- **Description**: a description of the rule that will display in the Alert Details section when an alert is triggered. The text field allows up to 256 characters.

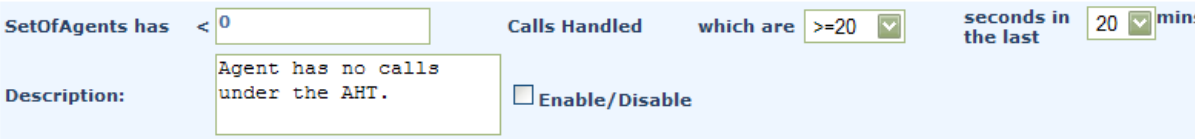

Figure 14: Rule example

If an invalid value is entered, an alert message box displays when the cursor moves off the field.

For example, a rule for short calling could be the set of agents has more than 2 calls handled that are less than 20 seconds in the last 20 minutes.

Viewing rules

1. Select the Rules tab.
   The rules display based on the last selected level. The edited values display in boldface and italicized.
2. Select a level in the Monitoring Hierarchy navigator.
   The rules for the selected level display in the pane on the right. The name of the selected level displays in the title bar.

Example

Let's look at the default settings for rules at the top node (Enterprise in our monitoring hierarchy) (Figure 15).

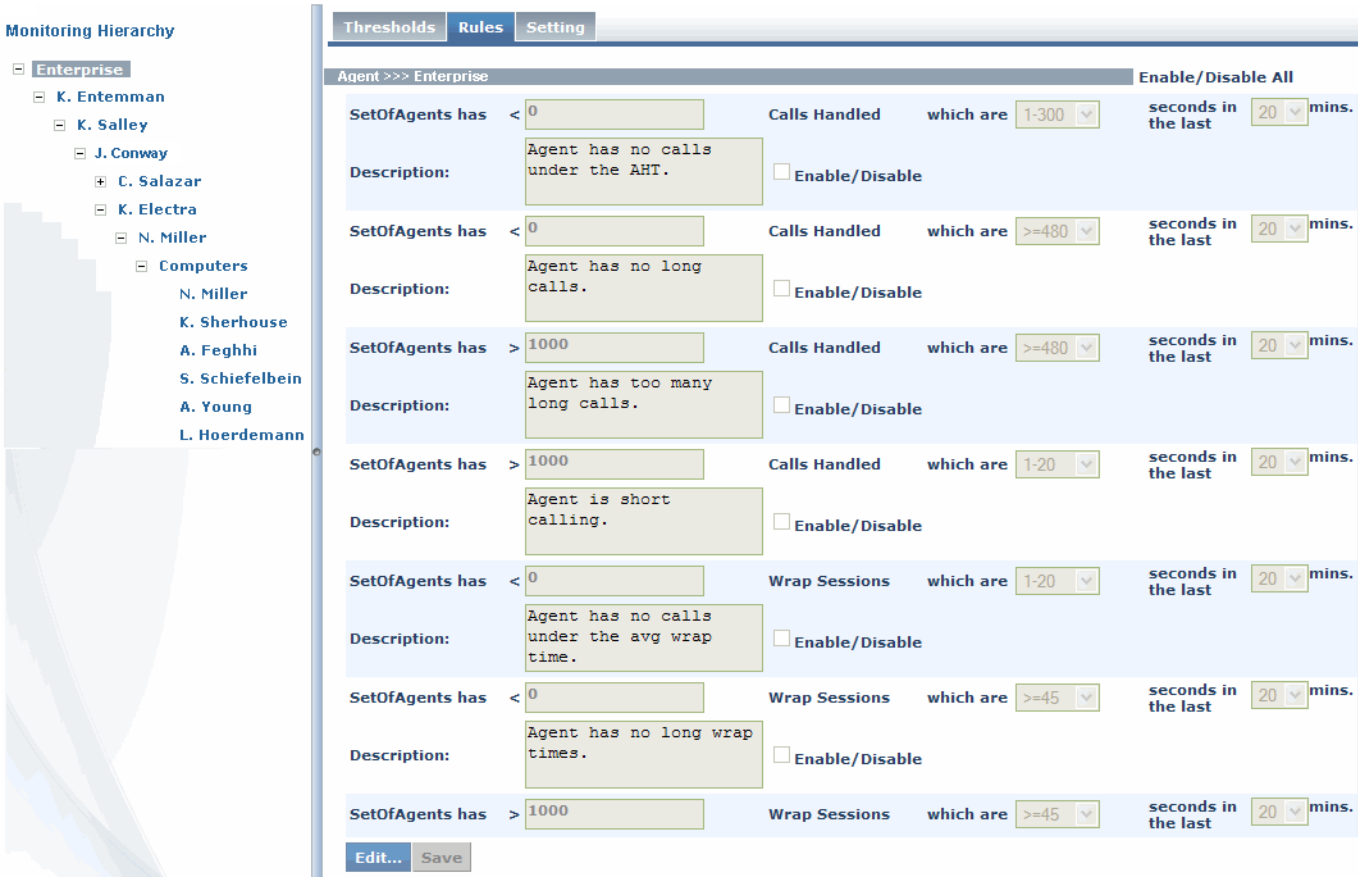

Figure 15: Default Calls Handled, 1-300

When you navigate to the Conway/Consumer node in the monitoring hierarchy, you see that the value of 1-300 for Calls Handled from the Enterprise node is inherited by the Conway/ Consumer node (Figure 15).

Figure 16: Inherited Calls Handled, 1-300

Disable/Override All Rules

To disable or override all rules at once, click Enable/Disable All.

Defining rules

To define a rule:

1. Select the Rules tab (Figure 13).
   The rules for the last selected level display.
2. To define rules, select a level in the Monitoring Hierarchy navigator.
   The rules and the title bar for the selected level display.
   Note: If any text field or check box is changed and you select a new level, a message displays requesting you to save or discard the changes.
3. Click Edit.
   The fields and Save button enable. The Edit button changes to a Cancel button.
4. Type a rule operator value.
5. If available, select a rule filter operator value.
6. Select a time interval from the drop-down list.
7. Type a comprehensive description of the rule in the Description text box.

8. To activate the rule, select the Enabled checkbox or to deactivitate the rule, clear the Enabled checkbox.
9. To save all of the rules, click Save.
   If any errors are detected through validation, an alert message displays.

Example

Suppose you want to override the inherited Calls Handled value of 1-300 with an override value of >=480 for the Conway/Consumer node and its subtree.

To modify a rule value, first click the Edit button (not displayed in Figure 16 because it is scrolled out of view). Then enter the override value and click the Save button. Figure 17 displays what the values now look like. Also note that the rule has been set to enabled.

From now on, unless changes are made, the Conway/Consumer node contains an override value of >=480. All nodes in the subtree, if they are enabled and if they do not have their own override value, inherit the value of >=480.

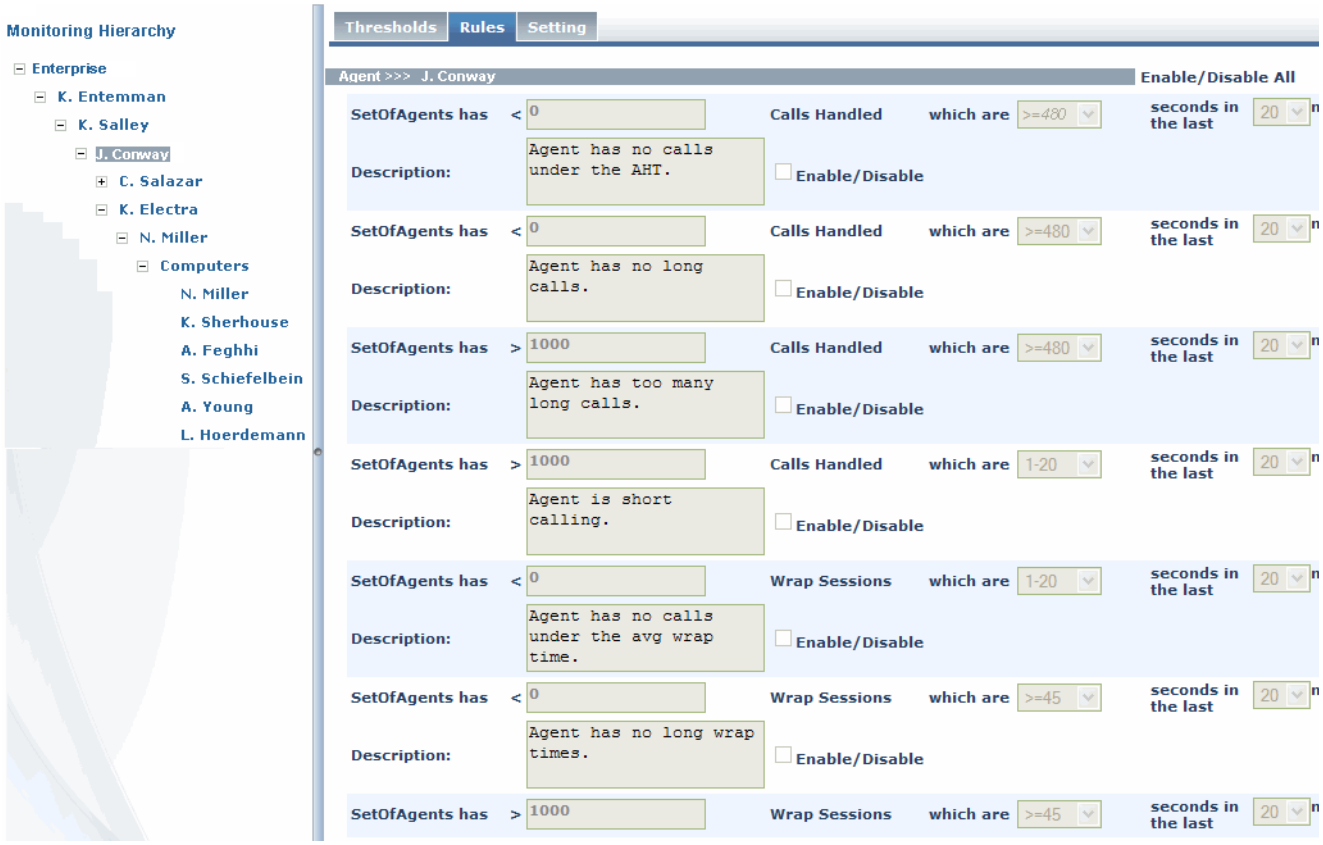

Figure 17: Override Calls Handled, >=480

Cancel

To discard any changes made and revert the contents of either the Rules tab to the last values saved to the database, click Cancel.

System Settings

On the Settng tab, you configure the system settings for:

- **Agent Name Visibility**: Show or hide the agent names and IDs in Frontline Advisor or Agent Advisor from all views, printouts, and the column chooser. The default is selected, that is, to show the agent names and IDs.
- **Agent Performance Interval** (seconds): The agent performance interval is the frequency of updating the teams' agent performance data and refreshing the cache data. Typically, it is configured to 10 minutes. If the TCD Interval is 10, then Frontline Advisor runs its TCD query every ten minutes.
- **Agent State Interval** (seconds): The agent state interval is the frequency of updating the teams' agent data. Typically, it is configured to 10 seconds.
- **Performance Calculation Interval** (seconds): The performance calculation interval indicates how many seconds back into the past the agent performance query should go. The default is 600 seconds.

To change the settings, select values and click Save.

To discard any changes made and revert the contents to the last values saved to the database, click Cancel.

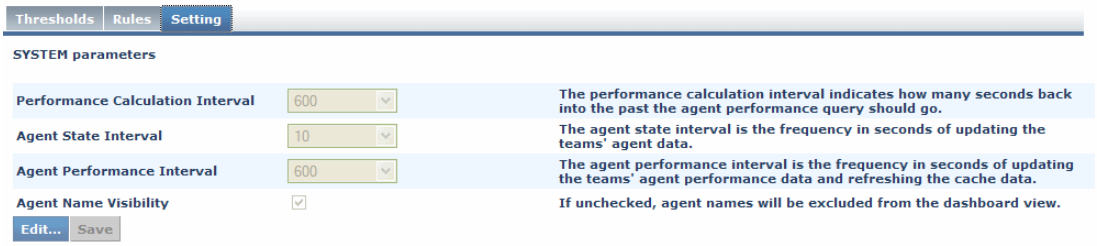

Figure 18: System Settings page

Navigation

Tooltips

To display a tooltip for an action, hover the cursor over the icon or button. Tooltips also help you see which values are inherited or overridden, and where those values come from. This helps when navigating through the monitoring hierarchy and viewing or modifying values. It does not matter if a node is enabled or disabled, the tooltips always display.

When you hover the mouse over a threshold or rule value, a tooltip displays one of the following types:

1. The value is inherited from the root node (threshold only).
2. The value is inherited from the root node (rule only).
3. The value is inherited from a node other than the root node (threshold or rule). Two pieces of information display: 1) the value is inherited and 2) the node the inherited value comes from.
4. The value overrides an inherited value (threshold or rule). Three pieces of information display: 1) the value is an override value, 2) the node whose value is being overridden, and 3) the inherited value that is being overridden.

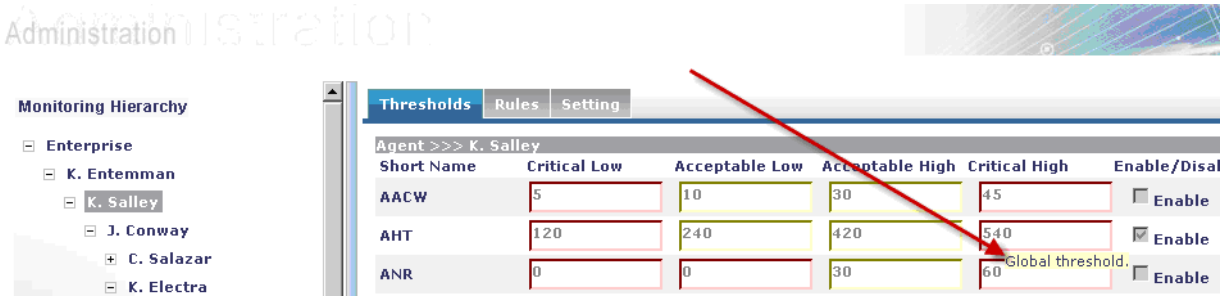

Figure 19: Type 1: This tooltip displays if you mouse over the inherited threshold value of 540 from the root node.

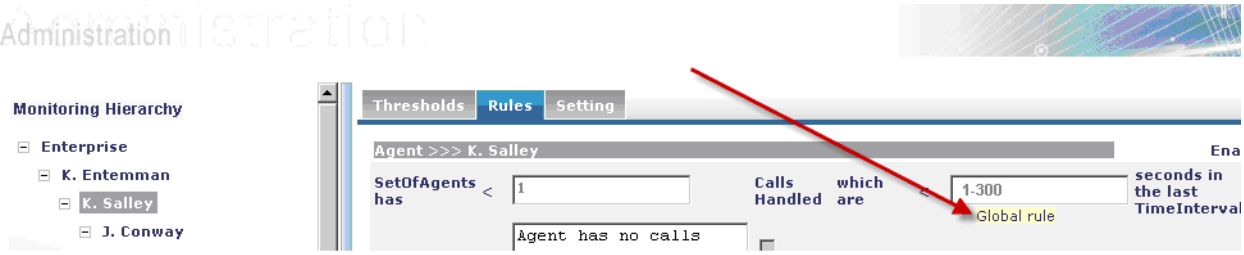

Figure 20: Type 2: This tooltip displays if you mouse over the inherited rule value of 1-300 from the root node.

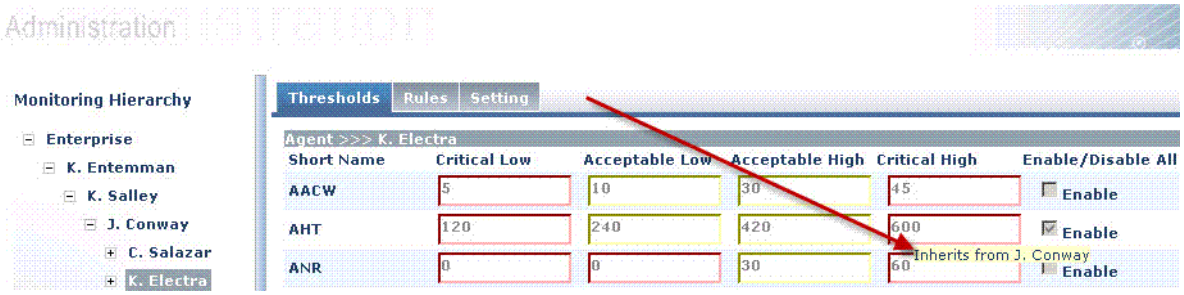

Figure 21: Type 3: This tooltip shows that the Electra/Electronics node inherits its value of 600 from the override value stored at the Conway/Consumer node.

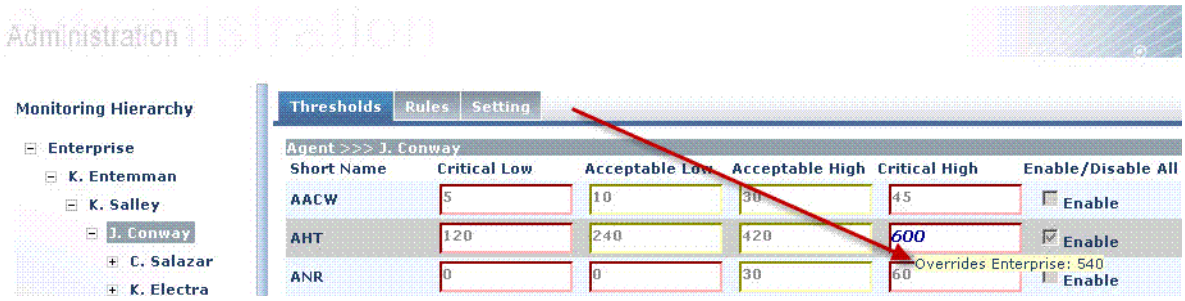

Figure 22: Type 4: This tooltip shows that the Conway/Consumer node overrides the value of 540 that would otherwise be inherited from the Enterprise node.

Expanding and collapsing hierarchies

- To open the next level, single click the Expand (+) button.
- To close all levels of a node, single click the Collapse (–) button or click Close All.

Persistent settings

Logging out and in (to any machine) or switching between tabs in the Informiam Browser retains the:

- Monitoring Hierarchy expansions
- location of the splitters
- selected level
- last selected tab (module)

Defining a URL

You can open a Web site from the Supervisor or Agent Console that you defined during installation by clicking the Dynamic link () icon. You can link to Frontline Advisor from other software. To define the URL address, open, C:\informiam\conf\FrontlineAdvisor.properties\ and then replace the default URL, supervisorConsole.url for the Manager Console and agentConsole.url for the Agent Console.

Accessing help

To display the *Frontline Advisor Administration Users Manual* in PDF form, click the Help button.

Logging In

Informiam Browser is installed in your Start folder or on your Desktop, so when you log in to your computer you should see a prompt to log in. Only users with the admin role can access the Administration Console.

To log in to the Informiam Browser:

1. Double click on the Informiam Browser icon.
   The Login page displays (Figure 23).
2. Type a user name (CUID) and password.
3. The host name is http://home.informiam.local by default; however, if the home.informiam.local server is not found while the Login page loads, you must type your server in the Host Name field. The host name is configured by the installer. If it is incorrect, see your system administrator. The new host name will become the default server for subsequent log ins.
4. To save the user name and password on your local machine, select the Remember Me on this Computer check box.
   If selected, the user name and password will pre-populate when you start the Informiam Browser.
5. Click the Log In button.
   The Informiam Browser displays with the module tabs to which you have access. Once logged in, you can display other modules to which you have access in other windows by clicking the  button.

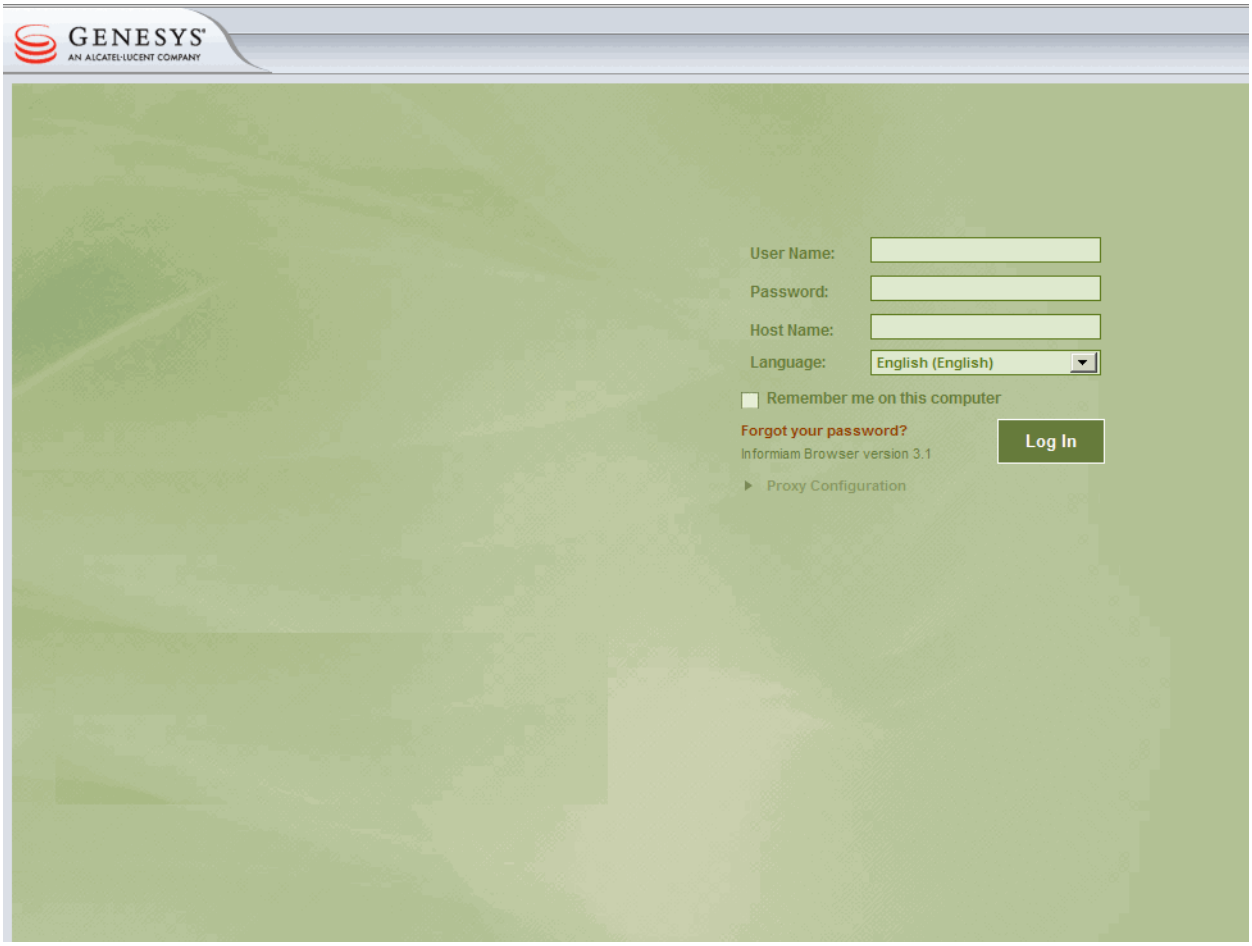

Figure 23: Login page

Navigation

Only the modules to which you have access display. The tab labels are configurable in the Contact Center Advisor Administration module on the System Configuration page.

Figure 24: Informiam Browser

Requesting a new password

To request a new password, if you forget yours:

1. On the Login page, click Forgot Your Password?
   A Forgot Password? page displays (Figure 25).
   Note: If your company uses LDAP, you must use your corporate tools to change your LDAP password.
2. Type your user name.

3. Type your e-mail address.
4. Click Submit.
   A new password is sent to your e-mail address.

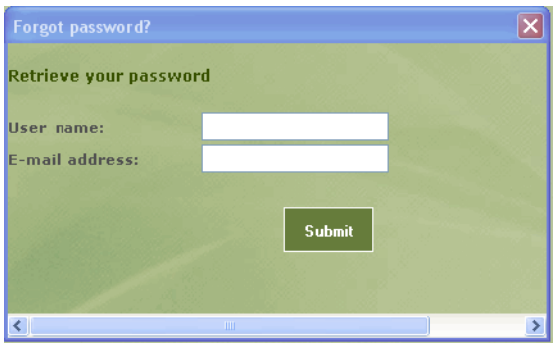

Figure 25: New Password page

Changing a password

You must be logged in to change your password.

To change your password:

1. Click the Change Password button.
   A Change Password page displays (Figure 26).
   Note: If your company uses LDAP, you must use your corporate tools to change your LDAP password.
2. Type your current password.
3. Type your new password.
4. To confirm, retype your new password.
5. To save, click Submit.

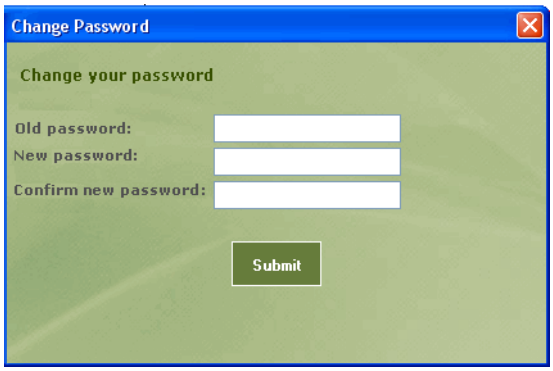

Figure 26: Change Password page

Logging out

You can log out of the Informiam Browser by clicking the Log Out button.

Appendix A: Acme Monitoring Hierachy

A sample monitoring hierarchy, called the Acme Monitoring Hierarchy, has nine teams of nineteen agents in a five-level hierarchy (Figure 27). The Acme monitoring hierarchy is used to explain the concepts of:

- Inheritance
- Enable/Disable
- Override values

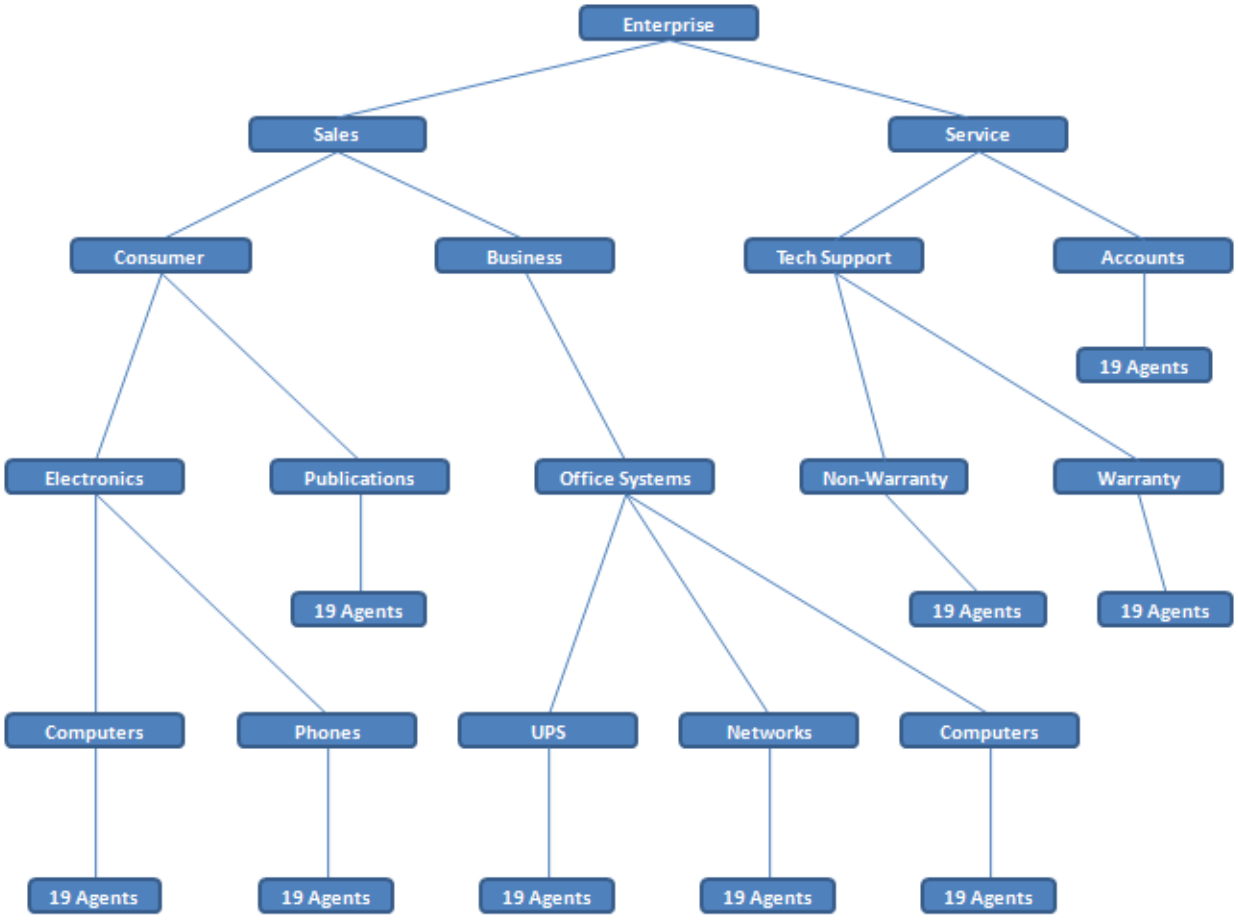

Figure 27: Monitoring Hierarchy

The monitoring hierarchy defines how agents are grouped, how groups are grouped, and so on, until there is just one all-encompassing group at the top. The monitoring hierarchy also shows which people can monitor which groups.

Note: Groups may be referred to as “nodes” and the monitoring hierarchy as “tree.” These terms are interchangeable.

Inheritance Example

Inheritance is the mechanism by which values higher in the tree are passed down to lower levels of the tree. A simple example is where the Phones node inherits the value of 300 from the Enterprise node (Figure 28).

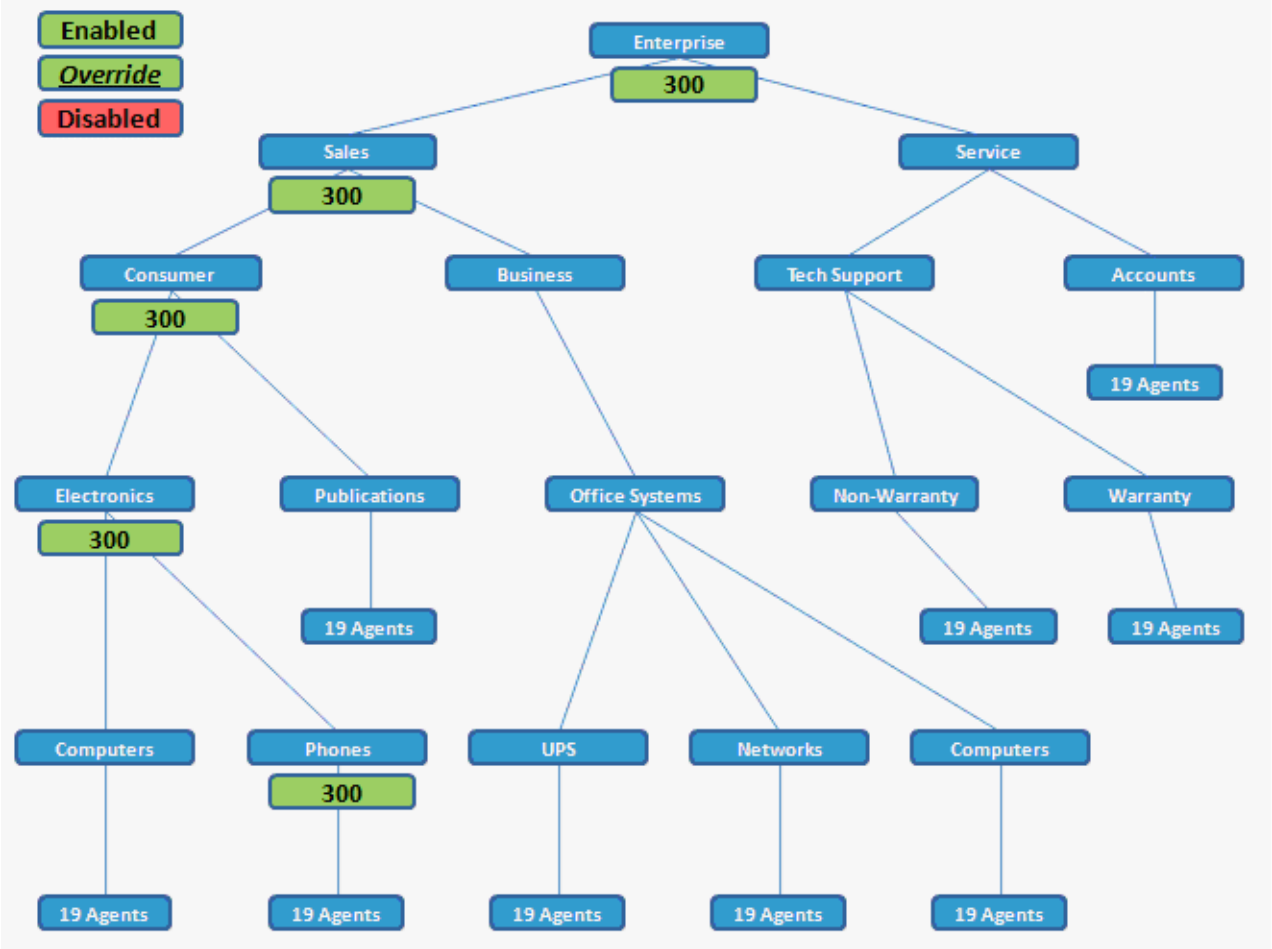

Figure 28: Phones node inherits the value from the Enterprise node.

Suppose the Consumer node has an override value of 400 (Figure 29). The Phones node will now inherit the value of 400 from the Consumer node.

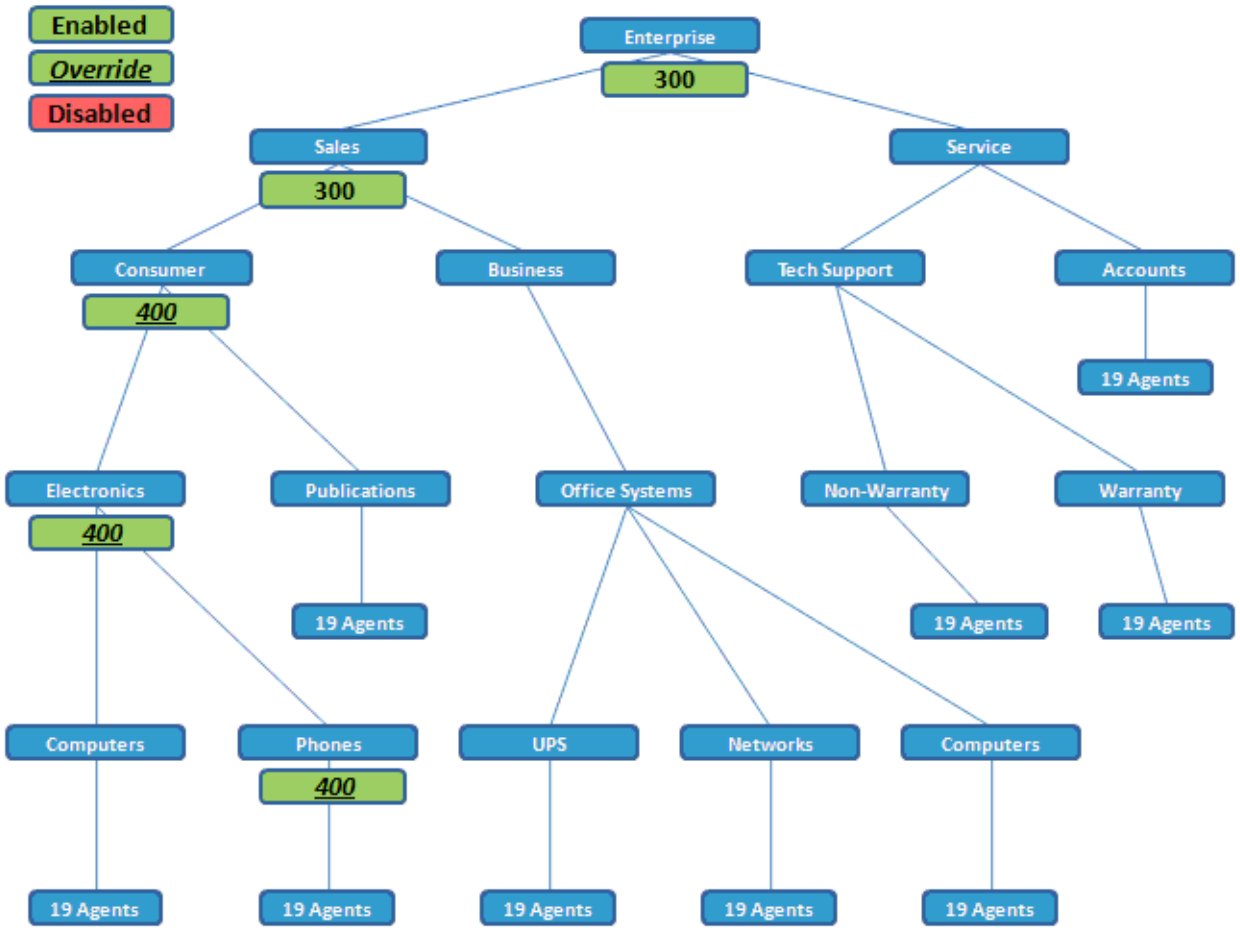

Figure 29: Phones node inherits the override value from the Consumer node.

Enabling or disabling a node determines whether or not the thresholds and alerts are active, for not only it, but all its children in the tree as well. In the example (Figure 30), if the Consumer node is disabled, so will be all nodes underneath it in the tree. This is always true unless the user enables any child node of Consumer in the tree (Electronics), at which time that and all of its children would also be enabled.

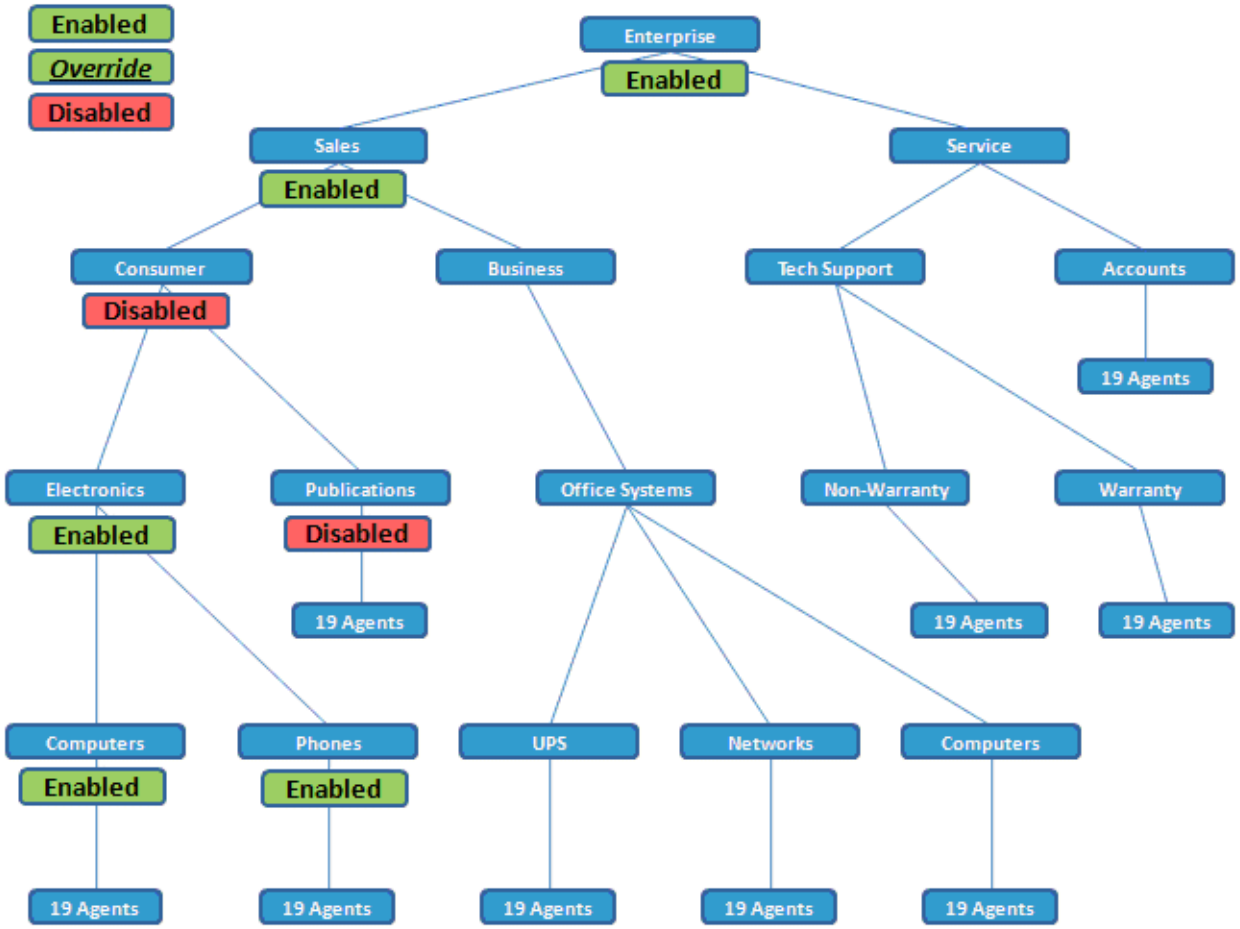

Figure 30: Disable the Consumer node

Appendix B: Defining Your Monitoring Hierarchy

The Acme Monitoring Hierarchy is used here to explain how to define and import the data representing a hierarchy. When you define your monitoring hierarchy, you will have this example to work from and guide you.

It is highly recommended that you produce a graphic of your hierarchy. Some hierarchies may be so large that this may not be possible but you should do it if you can. A graphic allows you to see the groups and monitors, as well as annotate the nodes with database IDs and other details that will make working with your hierarchy simpler and less prone to error. For more information on groups and monitors, see “Monitoring Hierachy Overview” on page 4.

The Acme Monitoring Hierarchy (Figure 31) displays both the groups and monitors in one graphic.

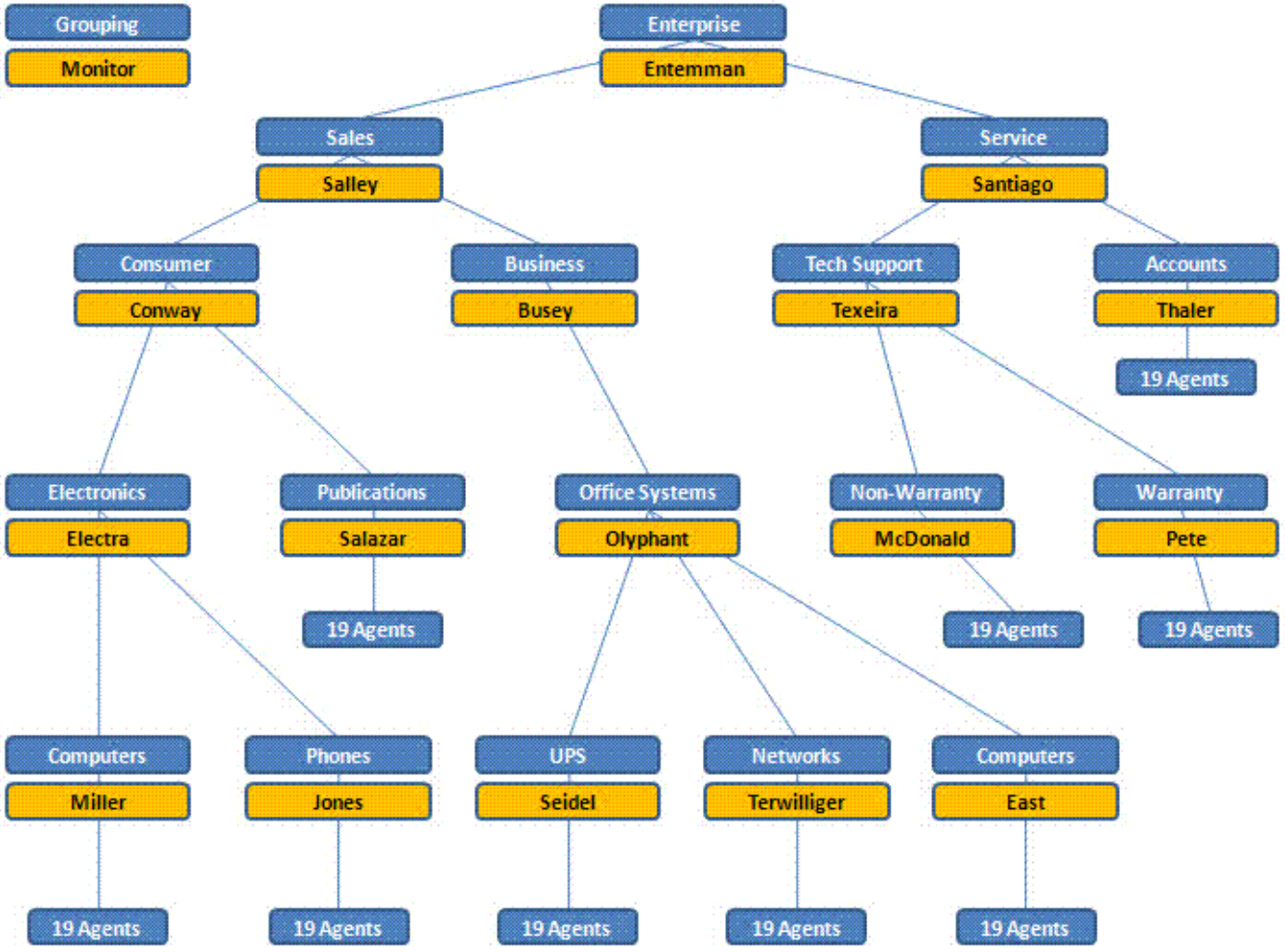

Figure 31: Acme Monitoring Hierarchy: groups/Monitors

We use this graphic to explain how to define the hierarchy database for the Acme Monitoring Hierarchy. Later, we will show how to build an even better graphic, once a successful import occurs and we know which IDs the system assigns.

The Acme Monitoring Hierarchy has nine groups, each with nineteen agents. It is common in contact centers to refer to the first-level groups as “teams” which we do here.

The nine teams (that is, first-level groups) are: Computers, Phones, UPS, Networks, Computers, Publications, Non-Warranty, Warranty, and Accounts. Note that groups are allowed to have the same name (Computers and Computers). As long as you make sure the data defines unique IDs, groups can have the same name.

These nine teams appear at various levels in the hierarchy. This is an important concept: teams do not all have to be at the same level of the hierarchy. For instance, the Phones team is two levels below the Accounts team.

The Acme Monitoring Hierarchy has more groups above the team groups. Computers and Phones are in the Electronics group. UPS, Networks, and (the other) Computers are in the Office Systems group. Groups within groups continue up the tree, until the root node. The root node of the Acme Monitoring Hierarchy is the Enterprise group.

Note: The monitoring hierarchy may be referred to as “tree.” Groups may be referred to as “nodes”.

In the Acme Monitoring Hierarchy, there are nine groups that group agents, plus there are eight higher-level groups which define higher and higher groups all the way to the Enterprise group.

The hierarchy also defines the monitors. For simplicity, the Acme Monitoring Hierarchy defines only one monitor per group. See “Defining Multiple Monitors” on page 40, for an explanation on how to define more complicated monitoring information.

As shown in Figure 32, each blue object is a group, and each orange object is a monitor. So, the person named Entemman monitors the Enterprise group, the person named Salley monitors the Sales group, the person named Electra monitors the Electronics group, and so on throughout the tree, with one person monitor for each group.

That’s it. That is the introduction to the Acme Monitoring Hierarchy. Now let’s move on to see how to define this organization so it can be successfully imported into Frontline Advisor.

The Hierarchy Database and Frontline Advisor

Before Frontline Advisor is started for the first time, you must define the monitoring hierarchy database and tell Frontline Advisor the name of the database. The location of the database must reside on the same database server as the Frontline Advisor database (see the *Informiam Frontline Advisor Installation Guide (Windows)*, *Server Installation*).

Frontline Advisor reads your monitoring hierachy database in one of three situations: 1) the very first time Frontline Advisor is started, 2) each time Frontline Advisor is restarted, and 3) once per day at the time you define (see *Informiam Frontline Advisor Installation Guide (Windows)*, *Monitoring Hierarchy Importer Configuration*).

The name of the database goes into the SourceName column of the DataSources table in the Frontline Advisor Database. See Figure 32, where the name of the Acme Monitoring Hierarchy has been defined to Frontline Advisor.

	SourceId	SourceName	SourceType	SourceTimeZone	SourceLastLoad	EmailPattern
	1	NULL	CISCO	240	NULL	NULL
	2	Acme_hierarchy	hierarchy	240	07/31/08 10:17:23 AM	REPLACE((LOWER(ISNULL(NULL...
▶*	NULL	NULL	NULL	NULL	NULL	NULL

Figure 32: DataSources table: SourceName

The default name of the hierarchy database is informiam_fadb_hierarchy. This is the name you will see immediately after installation. You can create the hierarchy database with the same name or you can choose any other name and replace the value in the DataSources table accordingly.

The "empty" hierarchy database is defined during installation (see the *Informiam Frontline Advisor Installation Guide (Windows)*, *Monitoring Hierarchy Importer Configuration*). Your task is to populate the hierarchy database with the data that defines your monitoring hierarchy.

You can populate your hierarchy by running sql scripts, or import it from spreadsheets, or use DTS, or whatever tools you are familiar with. The spreadsheet version of the Acme Monitoring Hierarchy is included in the installation which you can use as an example.

The general steps to define your hiearchy are the following:

1. Define your ID scheme
2. Update your graphic
3. Populate the FA_HIER_Person Table
4. Populate the FA_HIER_Agent Table
5. Populate the FA_HIER_Team Table
6. Populate the FA_HIER_Agent_Team_Member Table
7. Populate the FA_HIER_Supervisor_Team Table
8. Populate the FA_HIER_Supervisor_Supervisor Table

You must populate the data strictly in the order specified above.

Step 1: Define your ID scheme

To build and maintain your hierarchy database, it helps if you define a scheme for the IDs you will use. For example, you may choose IDs in the 8000 range for people, 9000 for groups, and so on.

Some aspects of your ID scheme are predefined so you need to know what those are. For example, you may want to use IDs in the range of 8000 for people, but you will import the people from your HR system, so you must use the HR IDs, not the 8000 range that you might prefer. The following is the list of IDs (columns in various database tables) that you must either define yourself, or inherit as predefined from other systems:

- **AgentSkillID**: Each agent that logs into the ACD has this ID; it is a given and not definable by you. AgentSkillID is used to link call activities recorded in the call management system to each agent defined in Frontline Advisor. For example, CISCO ICM SkillTargetID is equivalent to AgentSkillID.
- **PersonID**: Any person listed in your hierarchy – agent, supervisor or manager. This person must have a unique enterprise-wide id. This is typically a badge ID,

employee ID, or some other enterprise-wide unique ID that you may use for connection with other systems if necessary. PersonID is an alpha-numeric combination.

- **TeamID**: A unique ID that must be assigned to each group of agents. Each agent must belong to a team. If your source call management system does not have teams defined in it then the teams and their IDs must be defined by you.

The following is the ID scheme for the Acme Monitoring Hierarchy

- AgentSkillID: 7000 range
- PersonID: 8000 range
- TeamID: 9000 range

Step 2: Update your graphic

Now that you have a better understanding of your ID scheme, you can update your graphic. This step will help tremendously as you populate your tables, and especially as you make changes and maintain your hierarchy database over time.

Figure 33 shows the Acme Monitoring Hierarchy updated with the IDs.

You may not always be able to know as much about your hierarchy and produce such a good graphic but you should get as close as you can. It will always help to have a good graphic depiction of your hierarchy, and to write down as many IDs as you can.

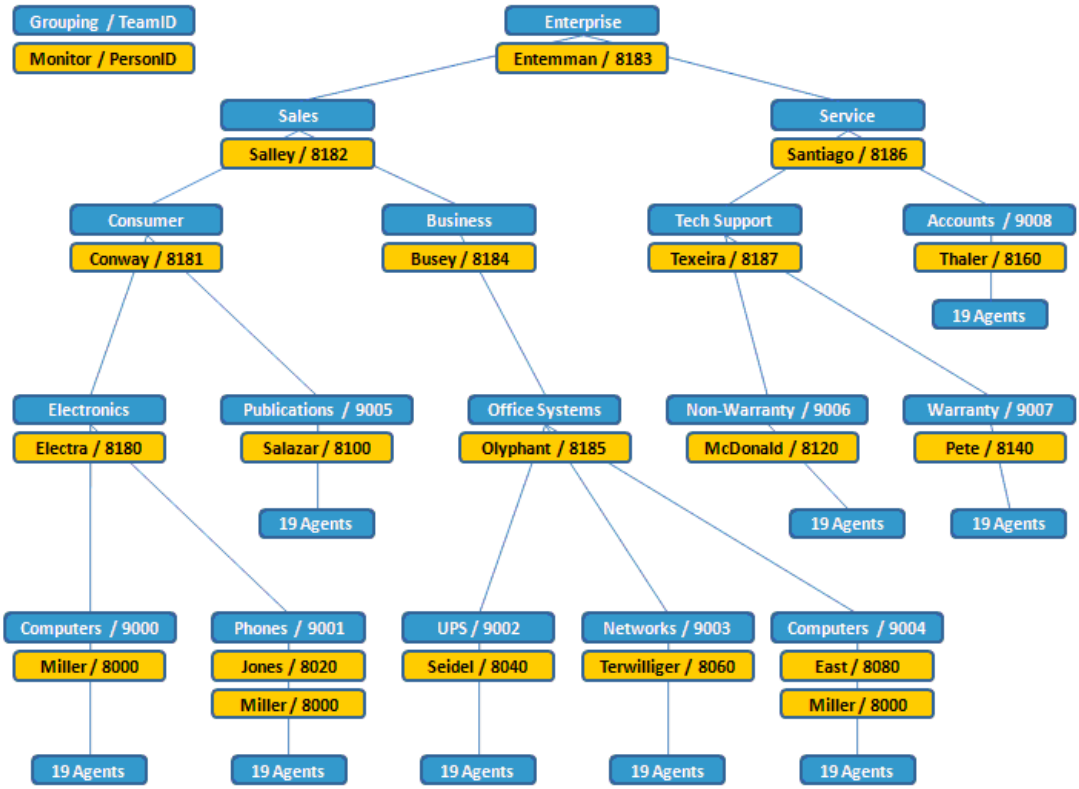

Figure 33: Acme Monitoring Hierarchy updated with the IDs

Step 3: Populate the FA_HIER_Person Table

You must populate the Person Table with the PersonID, First Name, Last Name, and LoginName for each person. The LoginName is the value that Frontline Advisor users use to log into the Informiam Browser.

The 188 people in the Acme Monitoring Hierarchy are all in the 8000 range. People with PersonIDs in {8000, 8020, 8040, …, 8160} are the monitors of the nine teams. People with PersonIDs in {8180, 8181, …, 8187} are the monitors of the eight higher-level groups. All the other people are agents.

Figure 34 shows the Person Table from the Acme Monitoring Hierarchy.

PersonID	Fname	Lname	LoginName
8000	Nancy	Miller	nmiller
8001	Kevi	Sherhouse	ksherhouse
8002	Alex	Feghhi	afeghhi
8003	S	Schiefelbein	sschiefelbein
8004	Andrew	Young	ayoung
8005	Lav	Hoerdemann	lhoerdemann
8006	Joanne	Math	jmath
8007	Brian	Ledder	bledder
8008	Georg	Guerrero	gguerrero
8009	Renne	Ballou	rballou
8010	Erik	Johnson	ejohnson
8011	Steven	White	swhite
8012	David	Duncan	dduncan
8013	David	Kang	dkang
8014	Chris	Wisinger	cwisinger
8015	Shawn	Shute	sshute
8016	Brande	Schoedl	bschoedl
8017	Bari	Reed	breed
8018	Bryan	Dunn	bdunn
8019	Ronnie	Ferrer	rferrer
8020	Ryan	Jones	rjones
8021	Graz	Gasparini	ggasparini
8022	Zulema	Pezzullo	zpezzullo
■ ■ ■			
8176	Carlos	Perez	cperez
8177	Kimberlee	Legaspi	klegaspi
8178	Kristian	Stubblefield	kstubblefield
8179	Christie	Vance	cvance
8180	Kyle	Electra	kelectra
8181	Jessica	Conway	tconway
8182	Ken	Salley	ksalley
8183	Kathy	Entemman	kentemman
8184	Rick	Busey	rbusey
8185	Sharon	Olyphant	solyphant
8186	Max	Santiago	msantiago
8187	Mia	Texeira	mtexeira
NULL	NULL	NULL	NULL

Figure 34: Person Table

Step 4: Populate the FA_HIER_Agent Table

You must populate the Agent Table with all of the people who log into the ACD as agents. There are three columns in this table: AgentSkillID, PersonID, and SourceID.

There is most likely a way for you to export the list of agents from your ACD system. The only part you need to extract for your Agent Table is the AgentSkillIDs.

You must match up the AgentSkillIDs with the PersonIDs from Step 3.

Lastly, you must put the SourceID that matches the ID of the source call management system specified in the DataSources table. This is the ID of the source that contains equivalents of your AgentSkillIds. In the DataSources table, the IDs of the records may be one of the following SourceType values: GENESYS, CISCO, AVAYA..

Note: For more complex environments it is possible to use multiple sources for the call data. In this case your DataSource Table will have more than one row with SourceType = [for example, GENESYS or CISCO]. Each source may contain the same ACD IDs and Team IDs, that is, the IDs from different sources can intersect. You must merge the data from all of the sources into one hierarchy. The explanation of how to do this is beyond the scope of this document. However, suffice it to say that you would need to pay attention to and make sure that you assign the correct SourceID to the Agent, Team and relationship records.

In the Acme Monitoring Hierarchy, all 180 agents come from one ACD and are in the 7000 range of IDs.

Figure 35 shows the Agent Table from the Acme Monitoring Hierarchy.

	AgentSkillID	PersonID	SourceID
▶	7000	8000	2
	7001	8001	2
	7002	8002	2
	7003	8003	2
	7004	8004	2
	7005	8005	2
	7006	8006	2
	7007	8007	2
	7008	8008	2
	7009	8009	2
	7010	8010	2
	7011	8011	2
	7012	8012	2
	7013	8013	2
	7014	8014	2
	7015	8015	2
	7016	8016	2
	7017	8017	2
	7018	8018	2
	7019	8019	2
	7020	8020	2
	7021	8021	2
	7022	8022	2
	7023	8023	2

■ ■ ■

	7168	8168	2
	7169	8169	2
	7170	8170	2
	7171	8171	2
	7172	8172	2
	7173	8173	2
	7174	8174	2
	7175	8175	2
	7176	8176	2
	7177	8177	2
	7178	8178	2
	7179	8179	2
*	*NULL*	*NULL*	*NULL*

Figure 35: Agent Table

Note: It is not necessary for the IDs to “line up” the way they do in the Acme Monitoring Hierarchy. Meaning, see Figure 35, it is not required for each AgentSkillID to be exactly 1000 less than the PersonID. The Acme Monitoring Hierarchy was generated from imported spreadsheets so it was possible to control the ID scheme. Your environment will almost never allow this sort of simplification. In fact, PersonID is an alphanumeric data type and AgentSkillID is an integer data type, further indicating there is no real relationship (especially mathematical) between them.

Note: The Agent Table in the Acme Monitoring Hierarchy includes the monitors of the first-level groups of agents. Essentially, these are the supervisors of the nine teams. Supervisors often have ACD logins in contact centers, therefore they appear in the list you get from the ACD. However, contact centers almost never want the supervisor metrics to interfere with the calculation of team averages. So in this case, you will include supervisors in the Agent Table but you will not include supervisors in the Agent_Team_Member Table (more will be explained in Step 6).

Step 5: Populate the FA_HIER_Team Table

You must populate the Team Table with the TeamID, EnterpriseName, PriSupervisorPersonID, and SourceID for each first-level group of agents.

The TeamID comes from your ID scheme, as annotated in your updated graphic. Note that TeamIDs only exist for first-level groups of agents. Higher-level groups do not have TeamIDs (although they will in a future release).

The EnterpriseName is the name for each group that appears in the Frontline Advisor user interface for the groups.

PriSupervisorPersonID is the PersonID of the primary monitor of each group. In this release, there can only be one primary monitor of a group, and any number of secondary monitors (also called backup supervisors). In a future release this constraint will not exist.

The SourceID is the same as the one listed for your database.

As shown in Figure 33, the Acme Monitoring Hierarchy has nine groups otherwise known as teams. They have TeamIDs = {9000, 9001, …, 9008}. There is one monitor defined for each of those groups, and they have PersonIDs = {8000, 8020, 8040, …, 8160}. The EnterpriseName's of each group are shown as well.

Now you can see some of the value of the annotated graphical representation of your hierarchy. Figure 36 shows the Team Table for the Acme Monitoring Hierarchy. You can see the data is much easier to define if you compare the graphic to the table.

	TeamID	EnterpriseName	PriSupervisorPersonID	SourceID
▶	9000	Computers	8000	2
	9001	Phones	8020	2
	9002	UPS	8040	2
	9003	Networks	8060	2
	9004	Computers	8080	2
	9005	Publications	8100	2
	9006	NonWarranty	8120	2
	9007	Warranty	8140	2
	9008	Accounts	8160	2
*	*NULL*	*NULL*	*NULL*	*NULL*

Figure 36: Team Table

If you experience problems when importing your hierarchy, you should refer back to the information on your annotated graphic and double check the accuracy of the Team Table.

Step 6: Populate the FA_HIER_Agent_Team_Member Table

You must populate the TeamId, AgentSkillId, and SourceId for each agent. Although the column names are not capitalized the same as the other tables, the values are the same as TeamID in the Team Table, the AgentSkillID in the Agent Table, and the SourceId in the DataSource Table.

Essentially, you must define which groups contain which agents in this table.

In the Acme Monitoring Hierarchy, TeamID = 9000 has AgentSkillID = {7001, 7002, 7003, …, 7019}, Team ID = 9001 has AgentSkillID = {7021, 7022, 7023, …, 7039}, and so on, for each of the nine teams. Again, because this database was generated from spreadsheets, the ID scheme is a lot cleaner than the one you must build.

Each AgentSkillID can be related to only one TeamId. If the same person potentially can belong to several teams then there will be as many separate entries of this person ID and different AgentSkillIds in the Agent table as there are teams the agent can belong to. This person's point-in-time team membership depends on what AgentSkillId is used to log in to the ACD.

Figure 37 shows the Agent_Team_Member Table for the Acme Monitoring Hierarchy.

TeamId	AgentSkillId	SourceId
9000	7001	2
9000	7002	2
9000	7003	2
9000	7004	2
9000	7005	2
9000	7006	2
9000	7007	2
9000	7008	2
9000	7009	2
9000	7010	2
9000	7011	2
9000	7012	2
9000	7013	2
9000	7014	2
9000	7015	2
9000	7016	2
9000	7017	2
9000	7018	2
9000	7019	2
9001	7021	2
9001	7022	2
9001	7023	2
■	■	■
9008	7168	2
9008	7169	2
9008	7170	2
9008	7171	2
9008	7172	2
9008	7173	2
9008	7174	2
9008	7175	2
9008	7176	2
9008	7177	2
9008	7178	2
9008	7179	2
NULL	*NULL*	*NULL*

Figure 37: Agent_Team_Member Table

As noted in Step 4, supervisors can be defined on their own teams (if they make calls), but they display in the hierarchy under themselves and are often not logged in. If supervisors almost never take calls, leave them out of the definition of their own teams. If you do include them on their own teams, and they log into the ACD and take/make phone calls, then their metrics will be included in their team averages. This is almost never required in contact centers. Therefore, in the Acme Monitoring Hierarchy, supervisors are not included in the definitions of team membership.

Step 7: Populate the FA_HIER_Supervisor_Team Table

You must populate the TeamId, SupervisorPersonId, and SourceId for each first-level group of agents. Again, the column names are not capitalized the same, but they are the same ID keys from the other tables you have populated so far.

This table is where you map monitors to groups. You only need to do this for the groups of agents; these are usually referred to as teams. The monitors of teams are usually referred to as supervisors. So this step is to map supervisors to teams.

It is possible to assign more than one supervisor to a team. This is explained in “Defining Multiple Monitors” on page 40. The Acme Monitoring Hierarchy does not do this, to keep things simpler.

To populate the Supervisor_Team Table, refer to your annotated graphic. You must define pairings of TeamIDs and PersonIDs where PersonID is the ID of the primary or a backup supervisor for the team.

Note: The entry of the primary supervisor - team pair in this table is not mandatory. The table may contain all supervisors for each team or just backup supervisors if there are any.

Figure 38 shows the Supervisor_Team Table for the Acme Monitoring Hierarchy.

	TeamId	SupervisorPersonId	SourceId
▶	9000	8000	2
	9001	8000	2
	9001	8020	2
	9002	8040	2
	9003	8060	2
	9004	8000	2
	9004	8080	2
	9005	8100	2
	9006	8120	2
	9007	8140	2
	9008	8160	2
*	*NULL*	*NULL*	*NULL*

Figure 38: Supervisor_Team Table

Step 8: Populate the FA_HIER_Supervisor_Supervisor Table

You must populate the SupervisorPersonId and BossPersonId for each hierarchical relationship of monitors in your hierarchy.

In this step, you are essentially defining the structure of all the levels that are above the first-level of groups. You will again need your annotated graphic to perform this step more easily and accurately.

It was mentioned previously that a person can be a monitor of more than one group. However, a person that is a monitor can only have one “boss” so this table only allows one-to-one child-to-parent relationships. A parent may have more than one child, but a child has one-and-only-one parent.

Figure 39 shows the Supervisor_Supervisor Table for the Acme Monitoring Hierarchy.

	SupervisorPersonId	BossPersonId
▶	8000	8180
	8020	8180
	8040	8185
	8060	8185
	8080	8185
	8100	8181
	8120	8187
	8140	8187
	8160	8186
	8180	8181
	8181	8182
	8182	8183
	8184	8182
	8185	8184
	8186	8183
	8187	8186
*	*NULL*	*NULL*

Figure 39: Supervisor_Supervisor Table

You can again see the value of the annotated graphic in defining this table. If you have any problems importing your hierarchy, or if your hierarchy appears to have missing nodes in the user interface, be sure to double check your graphic then double check the accuracy of this table.

Defining Multiple Monitors

This section explains how to define multiple monitors for a group by modifying the Acme Monitoring Hierarchy. Suppose you want Miller to monitor her own Computers Team and also to be a secondary monitor for Jones' Phones team and for East's Computers team.

You should update your annotated graphic to help you define multiple monitors. Figure 40 shows what we are about to define.

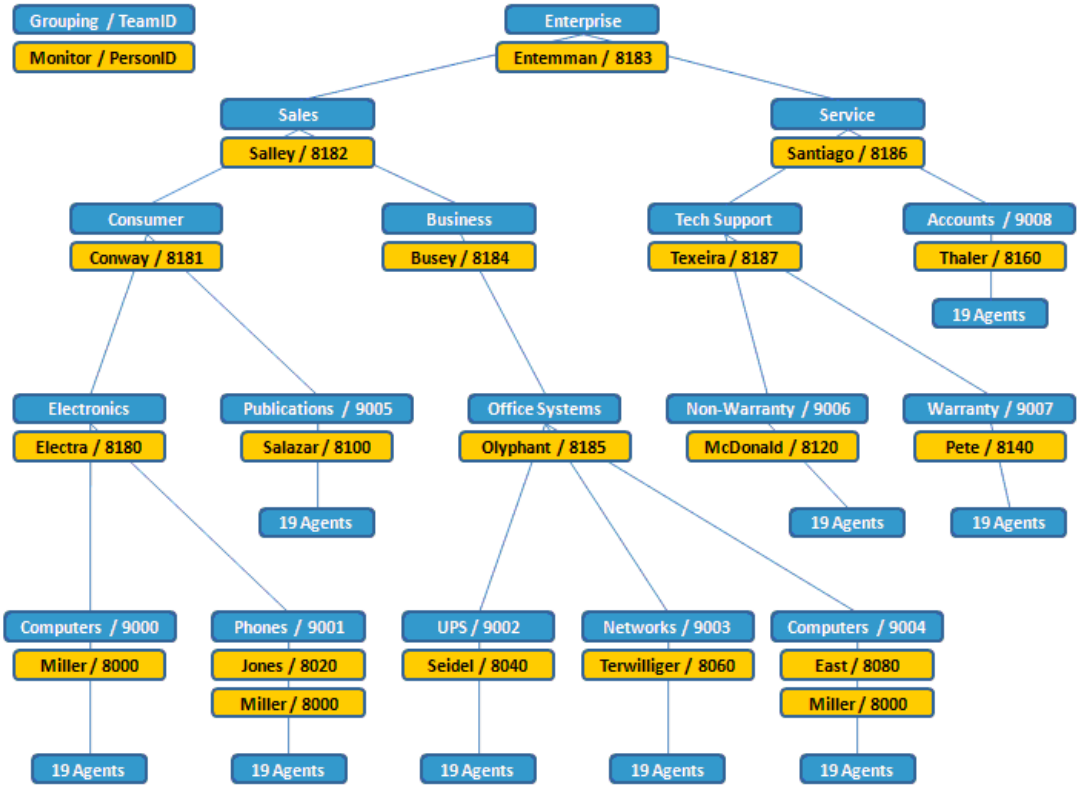

Figure 40: Monitoring Hierarchy

You can see in Figure 40 that the change we want to make is not that complex. We only need to add Miller as a monitor of the other two groups. You do this in the Supervisor_Team Table. Use the IDs from your annotated graphic to determine which rows to add to the table.

Figure 41 shows the Supervisor_Team Table for the Acme Monitoring Hierarchy ***before*** adding Miller as a monitor of two more teams.

VM-SHARK-VM0...ervisor_Team | Object Explorer Details

TeamId	SupervisorPersonId	SourceId
9000	8000	2
9001	8020	2
9002	8040	2
9003	8060	2
9004	8080	2
9005	8100	2
9006	8120	2
9007	8140	2
9008	8160	2
NULL	*NULL*	*NULL*

Figure 41: Supervisor_Team Table

Figure 42 shows the Supervisor_Team Table ***after*** adding Miller as the monitor of the other two teams.

	TeamId	SupervisorPersonId	SourceId
	9000	8000	2
	9001	8020	2
	9002	8040	2
	9003	8060	2
	9004	8080	2
	9005	8100	2
	9006	8120	2
	9007	8140	2
	9008	8160	2
	9001	8000	2
	9004	8000	2
▶*	NULL	NULL	NULL

Figure 42: Supervisor_Team Table

Figure 42 shows that we have added Miller (SupervisorPersonId = 8000) as a monitor of the Phones team (TeamId = 9001) and the other Computers team (TeamId = 9004).

The records that contain the pairs team-primary supervisor can be omitted. For example, Miller with (9000, 8000, 2).

Note: This is a relatively simple example of defining multiple monitors, therefore only one table needed to be modified. The changes you must make may involve new information that is not currently in the hierarchy. For example, new teams, new agents, and new people. In cases like these, return to Step 3, update your annotated graphic, then go through the remaining steps again to make sure all the new information is added to your database.

Maintaining Your Hierarchy

The steps explained here help you to define the first version of your hierarchy database. There is no doubt that your hierarchy will need to be modified over time. The absolute best way to do this is to use your annotated graphic. Update the graphic before making your changes so you can have a better picture of what you need to do.

For vast, wholesale changes, there are database scripts you must run first, and some other steps too, that are outside the scope of this document. You can contact your Informiam Technical Support Team for more information and help.

Appendix C: Tailoring a Coaching Strategy

You may want to use the concepts explained in this section to tailor a coaching strategy. A coaching strategy can be modified at any time. In general, coaching strategies will do the following steps:

1. Set values according to types of groups
2. Set values according to types of agents
3. “Raise the bar” over time for continuous improvement

Coaching Strategy Step 1

Consider our Acme Monitoring Hierarchy (in which the very first level under Enterprise, groups the organization into Sales and Service.

In a case like this, the coaching strategy will set sales-oriented values at the Sales node and service-oriented values at the Services node. For example, agents who are selling are most likely expected to talk longer than agents who are delivering customer service.

This Step 1 approach continues throughout the monitoring hiearchy, using inheritance when situations are similar, and using overrides when situations are different.

For example, under the Sales group is Consumer and Business. These two groups are similar in some ways because the agents are selling, but they are also different from each other because one group sells to consumers and the other group sells to businesses.

To further the Consumer and Business example, agents in both groups are selling and probably would be expected to perform the same number of holds and transfers. So the two groups would be set to inherit the hold and transfer thresholds from the Sales node. Wrap time for selling to consumers might take a shorter time than wrap time for businesses because the wrap for business buyers may include checking the balance in the business account. In this case, Consumer would be set with override values for Wrap Time different than the override values for Wrap Time in the Business group.

This Step 1 approach of setting values according to similarities and differences of groups continues all the way down the tree to the agents.

Coaching Strategy Step 2

The Acme Monitoring Hierarchy does not help much to explain Step 2. To explain Step 2, simply consider new agents versus veteran agents.

In any given group, some agents will be new and some will be veterans. Step 2 merely uses inheritance and override values at the agent level to coach differently according to agent type.

For example, newer agents might be expected to talk a little longer than veteran agents, until the newer agents learn better call control, company policies, computer applications, and so on. Veteran agents know these things, so a good coach will challenge them with tighter override values to help them continue to get a little better each day.

Therefore, Step 2 is the use of inheritance and overrides at the per-agent level, enabling coaching by agent type.

Note: Sometimes Step 2 occurs at a team level too. For example, sometimes a “nest” is used to incubate new agents, while a “tiger team” is used to leverage the expertise of long-time, veteran agents. Step 2 would use inheritance and override at the team level in these cases, where teams are groups of agent types.

Coaching Strategy Step 3

Step 3 is simply the modification over time of the other steps. Good coaches know that the best way to help people get better over time is to do it in smaller steps rather than large steps.

Therefore, Step 3 is about “raising the bar”, where coaches tighten or loosen values over time to continuously challenge agents and help them to always be improving their performance.

