GENESYS®

AN ALCATEL-LUCENT COMPANY

Agent Advisor™

Agent User Manual Release 3.3

Genesys Performance Management Advisor™

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Overview

Agent Advisor™ improves both agent performance and customer satisfaction by giving agents a real-time view of their activity. Customizable alerts draw immediate attention to performance-related activity, good, or otherwise.

The real-time data enables agents to correct problems and reinforce progress as it happens, not after the break or during the next shift. Agent Advisor puts everything agents need to pay attention to in a single location, so they can capture the priority issues and quickly direct their attention to areas that may require attention.

Current status, performance, behavioral- or activity-based data can be presented in customized views. Sophisticated, configurable business rules monitor key performance indicators and call attention to situations requiring immediate attention.

The alert activity in Agent Advisor makes agent activity trends more obvious.

Agent Advisor is designed to help agents raise their performance, allowing them to instantly identify activities that need correction or additional training, as well as areas where agents are performing optimally.

Agent Console

The Agent Console (Figure 1) is divided into four panes:

- **Team pane**: where you can focus on your overall status in real time
- **My Current Alerts pane**: the details of your uncleared alerts
- **My Alert History pane**: the details of your cleared and uncleared alerts
- **Configure pane**: to choose which columns display

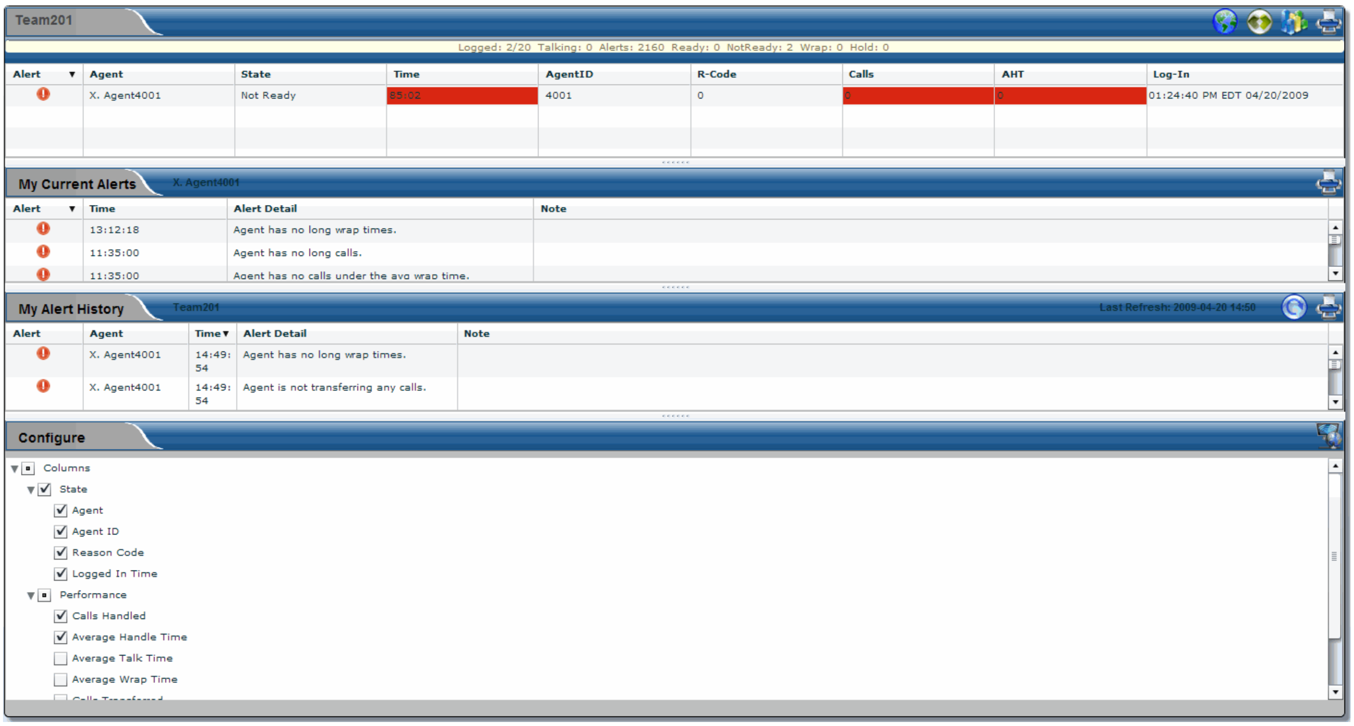

Figure 1:Agent Console

How Agent Advisor monitors agents

Thresholds and rules are defined in the Administration Console by users with the admin role. Thresholds define the critical, warning, and acceptable conditions for each metric. Thresholds and rules can be used to find positive behavior as well.

Depending on the metric, a value may be acceptable above or below a certain value. Some thresholds trigger an alert if the value is below or above defined values. 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 (green).
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).

The four text boxes are colored to provide a visual cue for the status (Figure 2). Red indicates a critical value range. Yellow indicates a warning value range. Green indicates an acceptable value range.

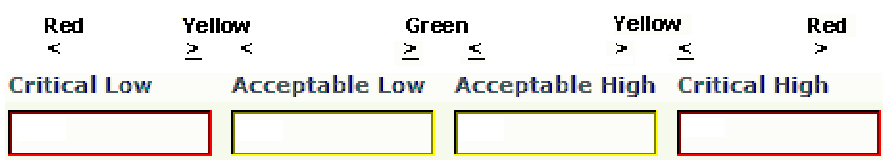

Figure 2: Threshold bar

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 green. 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 3).

Figure 3: Threshold is acceptable between two values

In the example in Figure 4, handling 2 or more calls but less than or equal to 5 calls is normal (green). Handling 1 call triggers a warning (yellow). Handling less than 1 call or more than 5 calls is a critical (red).

Figure 4: Threshold without a high yellow warning

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

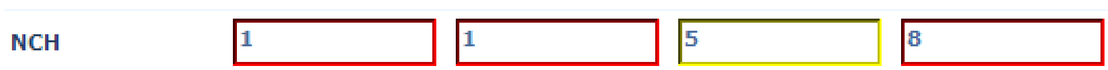

Figure 5: Threshold without a low yellow warning

Rules are conditions that continuously monitor statistics. For example, an agent has more than 10 agent calls transferred in the past 10 minutes. If the status is within a critical or warning range, an alert is triggered. Alerts help to focus your attention on the most important issues effecting performance. Rules also count events throughout an interval of time, which allows them to trigger on the frequency of events. The frequency of an alert is a leading indicator of good or bad trends. It is good practice to learn to make use of alerts to quickly focus on where to take action now.

A threshold compares a measured value at a point in time to a threshold range to determine the status. Rules evaluate and trigger on agent metrics, but not for team metrics.

The five types of thresholds and rules are:

Class	Explanation	Action
Threshold	Based on a count	change text red or yellow
Threshold	Based on an average or maximum time value	change text red or yellow
Threshold	Based on the duration of an agent's state	change text red or yellow
Rule	Based on the frequency of calls held or calls transferred	issue a red alert
Rule	Based on the frequency of (long or short) call durations or wrap times	issue a red alert

Figure 6: The five types, how they trigger, and what actions they perform

Red indicates at least one critical alert.

Green indicates that no alerts are active: the value is normal.

 In addition, a gray icon indicates the agent is not logged into the ACD.

Team

The Team view (Figure 7) is where you can focus on your overall status in real time. The information is updated and refreshed by default every 10 seconds. The refresh rate is configured in the Administration module. The following columns display:

- **Alert**: the agent's current alert state is indicated by a colored icon. In addition to red and green, a gray icon indicates the agent is not logged into the ACD.
- **Agent**: first initial and last name
- **State**: the agent's current state, including logged on, logged out, not ready, ready, talking, work not ready, work ready, busy other, reserved, unknown, hold, active, paused, and not active.
- **Time**: the amount of time that the agent has been in the current state (minutes:seconds)
- **R-Code**: a code indicating the reason for the agent's most recent change of state
- **Agent ID**: the agent's identification

Figure 7: Team view

Viewing your team's status

Your team's status displays how many agents are logged in and other state information (for example, talking, ready, not ready, wrapping up, on hold, and the number of alerts). Display your team's status by clicking the Statistics ( ) icon in the Team view (Figure 8).

Logged: 0/20 Talking: 0 Alerts: 0 Ready: 0 NotReady: 0 Wrap: 0 Hold: 0

Figure 8: Team Status

The information uses the performance calculation interval and rule time interval (which is set by the administrator). It updates by default every 10 seconds.

Viewing your team's performance

Your team's performance information displays the metric values aggregated over the performance calculation interval (Figure 9). When a threshold is exceeded, its value changes color. Display the agent performance metrics and values by clicking the Performance ( ) icon.

Calls: 48 AHT: 359 AvgTalk: 317 AvgWrp: 12 Xfer: 5 LngCall: 1230 LngWrp: 136

Figure 9: Team Performance

The information uses the performance calculation interval (which is set by the administrator). It updates and refreshes every 10 minutes.

My Current Alerts

The details of your uncleared alerts display in the My Current Alerts view (Figure 10). Display your alerts by selecting your name in the Team view. Your name displays beside the My Current Alerts view. The alerts are for the current day (since 12:00:00 a.m.) and default to reverse chronological order.

The details of the My Current Alerts view include:

- **Alert**: the alert's status (red). Values do not update in the My Current Alerts view until you log in.
- **Time**: the time when the alert was triggered on the current day (hh:mm:ss)
- **Alert Detail**: the rule description
- **Note**: a note for the alert from your supervisor

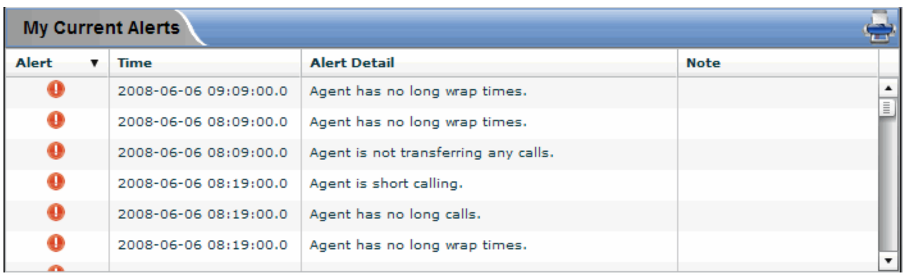

Figure 10: My Current Alerts

My Alert History

The details of your uncleared and cleared alerts display in the My Alert History view (Figure 11). Your team's name displays beside the My Alert History tab. The alerts are for the current day (since 12:00:00 a.m.) and default to reverse chronological order. You cannot view alerts beyond the current shift.

The details of the My Alert History view include:

- **Alert**: your alert state is indicated by the color of icon.
- **Agent**: first name initial and last name
- **Time**: the time when the alert was triggered on the current day (hh:mm:ss)
- **Alert Detail**: explanatory text describing what situation triggered the alert
- **Note**: the text a supervisor provides for the alert

Update the list by clicking the Refresh icon. The date and time of the last refresh display next to the Refresh icon.

Figure 11: My Alert History

Printing your Team view and team performance

You can print the Team's view and performance in a formatted report. Of the columns currently in view, you must select which columns to print. The printout goes to any printer that is configured for the computer on which the Agent Advisor is running.

To print the Team's view and team performance:

1. Click the Print (PRINT) icon.
   The column chooser displays with only the columns currently selected for the Team's view.
2. Select at least one column.
   If the selected columns do not fit on one page, additional pages are printed with the same page number. All of the first view is printed before the second view.
3. Click the Print button on the column chooser.
   A system printer dialogue displays.
4. Select the printer configuration.
5. Click Print to confirm.
   The document is sent to the printer.

Printing your current view of the My Current Alerts view

You can print the alerts from the My Current Alerts view in a formatted report by clicking the Print (PRINT) icon. The printout goes to any printer that is configured for the computer on which the Agent Advisor is running. Details of the printout include:

- alert status
- your name
- alert detail
- time the alert was issued

Printing the Alerts Log in My Alert History

You can print the alerts from the My Alert History view in a formatted report by clicking the Print ( ) icon. The printout can be sent to any printer configured for the computer that the Agent Advisor is running on. The report includes all issued alerts since the last refresh that is currently being monitored. Each row displays:

- alert status
- your name
- time the alert was issued
- descriptive text associated with the rule triggering the alert

Opening a defined URL

You can open a Web site that your administrator defined by clicking the Link Out ( ) icon.

User Status icon

You can display the User Status icon ( ) to monitor the status of alerts while Frontline Advisor runs in the background. When you trigger an alert the icon changes to red. You may want to keep the User Status icon on your desktop, then if/when it changes color, open Agent Advisor (Figure 1) to see the details.

Customizing the Display

Choosing metric columns

You can select which of the optional state and performance metrics display.

The state metrics include: Agent, Agent ID, Reason Code, and Logged in Time. The performance metrics include: Calls Handled, Average Handle Time, Average Talk Time, Average Wrap Time, Calls Transferred, Longest Call, and Longest Wrap.

Figure 12: Column Configurator

To select the columns:

1. Expand the Configure view and select check boxes.
   Include all agent states or performance metrics by selecting the State or Performance check box. Exclude agent states or performance metrics by clearing check boxes or exclude all agent states or performance metrics by clearing the State or Performance check box.

2. Click Apply. The selected columns display in the Team view.

Ordering the metrics

You can change the order the metrics display by dragging a column heading to another location in the view. The default columns always display to the left of the optional columns. You cannot hide the default columns.

Sorting the views

You can sort a view by clicking a column heading. You can sort the view in ascending or descending order. Sorting by the Alerts column is a great way to see all red alerts first. A sort triangle indicates the direction.

Adjusting the width of columns

If one or more columns are selected to, or removed from, display, the width of the columns adjusts accordingly. There is a minimal default width. Adjust the width of individual columns, by dragging the pointer when it changes to a  near the column break.

Resizing the views

You can resize the height of each view by dragging the splitter up or down.

Note: Your name displays in the Alert log if you have had any alerts since 12:00:00 a.m..

Persistant settings

Logging out and in (to any machine) or returning from another module in the Informiam Browser retains the:

- column selection
- location of the splitters
- team performance or team statistics

Informiam Browser

Logging in

You can launch the Informiam Browser using Windows start up menu or by using the shortcuts located on the desktop or the task panel.

Authentication is tied to the monitoring hierarchy imported from the source tables. Any agent defined in the monitoring hierarchy has log in permission for Agent Advisor.

To log in to the Informiam Browser:

1. Double click on the Informiam Browser icon.
   The Login page displays (Figure 13).
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.

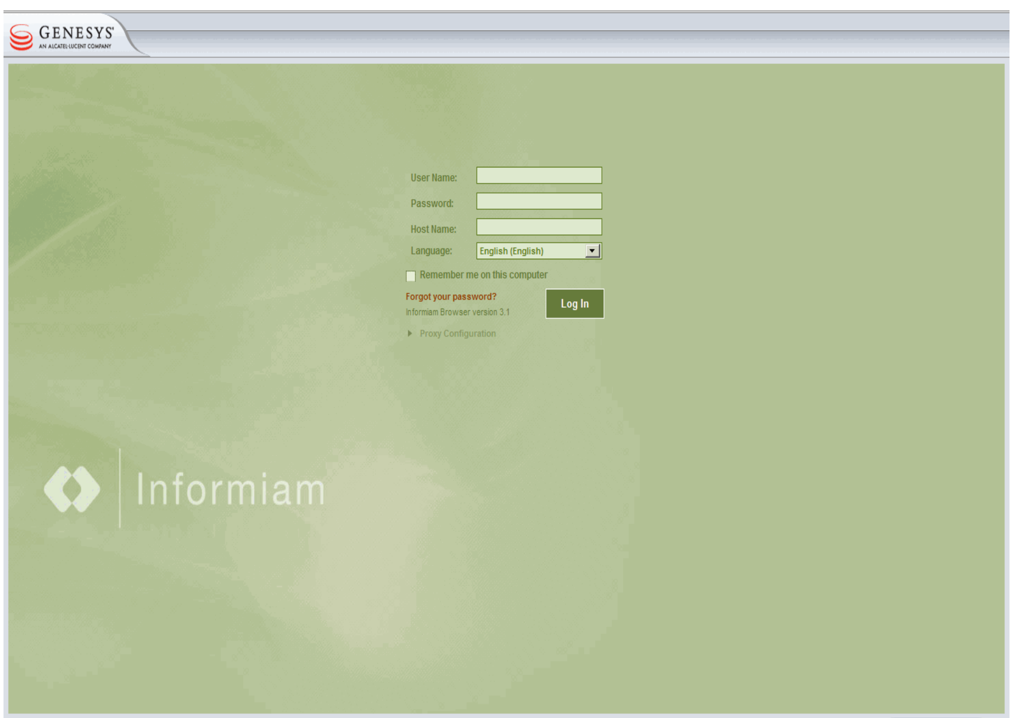

Figure 13: Login page

Navigation

Only the modules to which you have access display (Figure 14). The tab labels are configurable in the Contact Center Advisor Administration module on the System Configuration page.

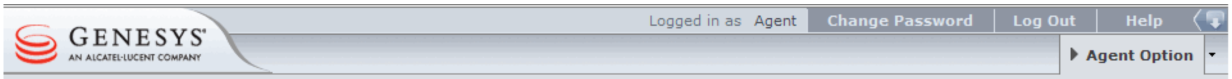

Figure 14: Informiam Browser

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 15).
   Note: If your company uses LDAP, you must use your corporate tools to change your LDAP password.
2. Type your user name (CUID).
3. Type your e-mail address.
4. Click Submit.
   A new password is sent to your e-mail address.

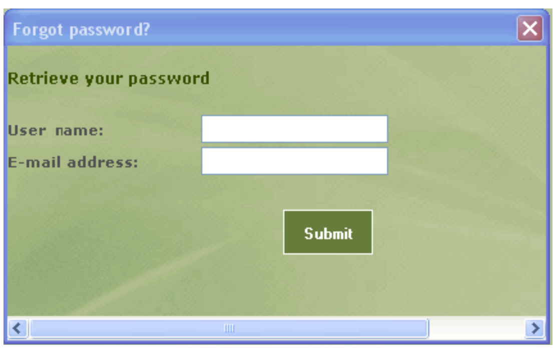

Figure 15: New Password page

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 16).
   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.

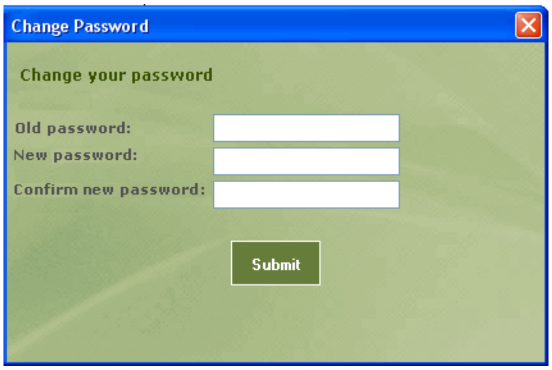

Figure 16: Change Password page

Accessing help

You can display the *Agent Advisor Users Manual* in PDF form by clicking the Help button.

Logging out

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

