GENESYS®

AN ALCATEL-LUCENT COMPANY

Resource Management

Genesys Performance Management Advisor™

User Manual Release 3.3

Genesys Telecommunications Laboratories, Inc.
2001 Junipero Serra Boulevard
Daly City, CA 94014
USA

Contents

Resource Management Overview

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 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 3.
- the Applications or Contact Groups pane, see “Selecting agents from the Applications or Contact Groups pane” on page 4.
- the Skill Groups pane, see “Selecting agents from the Skill Groups pane” on page 5.

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.

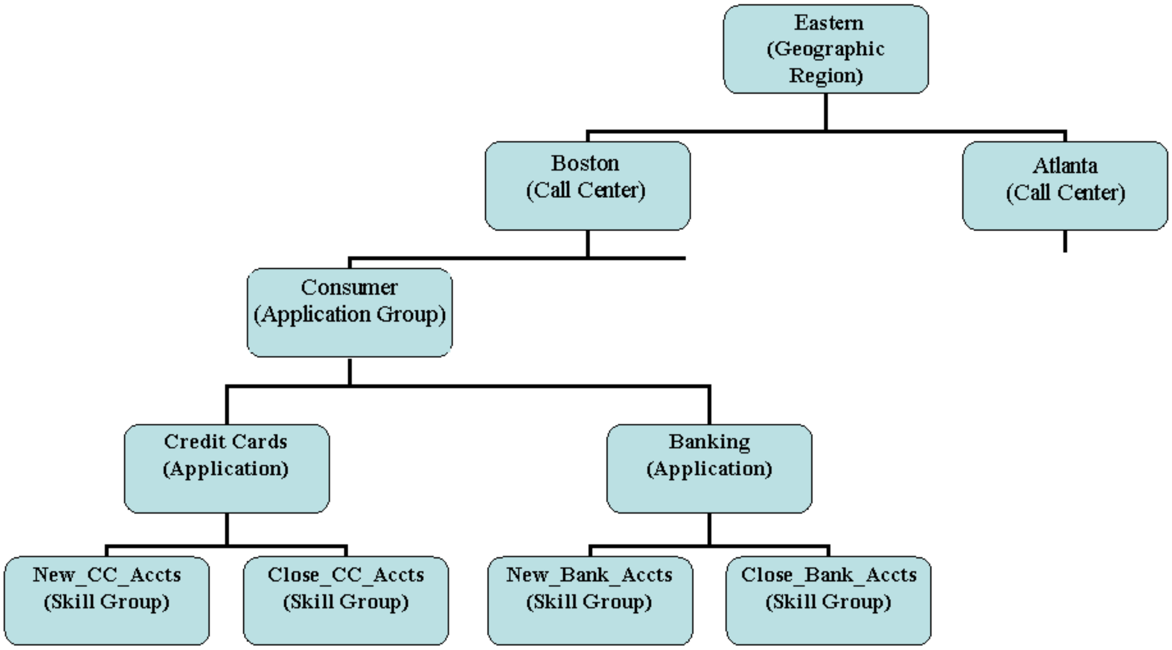

Figure 1: Enterprise relationships

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).

Selecting Your View of the Information Displayed for Agents

Resource Management displays each agent on a separate row in the table with the following information:

- **First Name**
- **Last Name**
- **User ID**
- **Status**
- **Time in State**: how long the agent has been in the state
- **Reason Code**: the reason an agent is not ready, for example, break, meeting,or after work
- **Agent Group**: the skill group that the agent is a member of
- **Skills & Levels**: The skills display with their associated levels as configured for that agent .

  The default width of the Skills column displays only one of the skills associated with an agent. You can either view all of the skills associated with an agent in a tooltip by clicking the Skills & Levels cell for an agent; or you can view all of the skills for the set of displayed agents by clicking on the ellipses (…) in the column header. The latter will collapse the User ID, Status, Time in Status, and Reason Code columns; and the Skills & Levels column will expand to bring all of the skills in view. You can still re-size the columns to adjust the view. To return the columns to their original width, click on the ellipses (…) in the Skills & Levels column header.

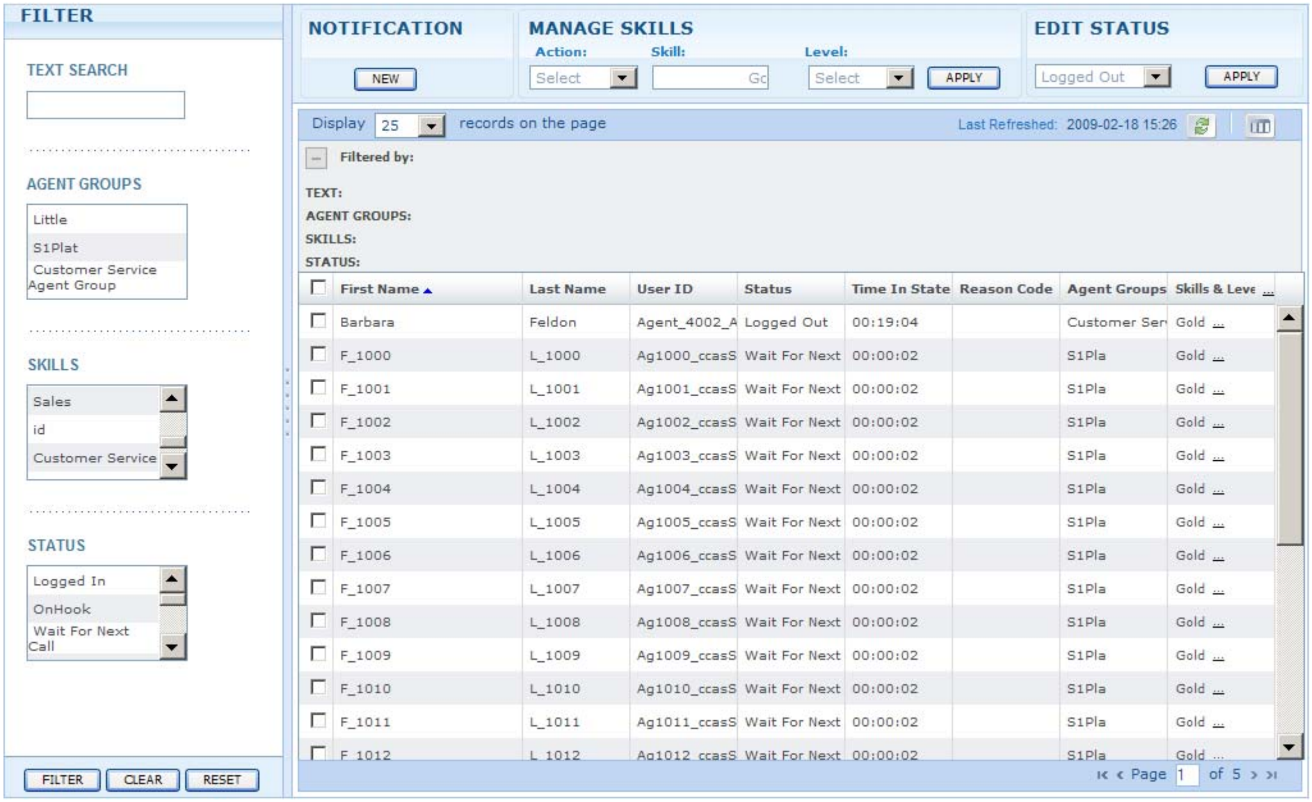

Figure 2: Resource Management

Refreshing the agent's current status

The information in the table is not updated automatically. To update the phone states, times in state, and the reason codes, click Refresh ( ).

Sorting the agents

You can sort and sub-sort agents by clicking on any column heading except the Skills & Levels column. The Skills & Levels column is not sortable since agents' possess different skills and are not listed in the same order across the agents.

Filtering the list of agents

You can filter the list of agents by:

- **Agent Groups**: This list contains all of the skill groups (agent groups) related to the rows selected on the dashboard. For example, if an application is selected on the dashboard, then all the skill groups associated with that application display in this list. Selecting one or more agent groups filters the list of agents to only those that belong to those agent groups.
- **Skills**: This list contains an aggregate of all of the skills for all of the listed agents. For example, suppose a Genesys environment has three defined skills: Customer Service, Banking, and Trade Accounts. If the agents shown only have two of these three skills – Banking and Trade Accounts – then those are the

skills that display in the filter. Selecting one or more skills filters the list of agents to only those that have those particular skills.

- **Status**: This list contains all of the states an agent can be in at any given moment. Selecting one or more states filters the agents to only those that are currently in the selected states. The list of states are:
    - LoggedIn
    - OnHook
    - WaitForNextCall
    - OffHook
    - CallDialing
    - CallRinging
    - NotReadyForNextCall
    - AfterCallWork
    - CallOnHold
    - CallUnknown
    - CallConsult
    - CallInternal
    - CallOutbound
    - CallInbound
    - LoggedOut
- **Text Search**: Text search filters the list of agents with the specified text for any field.

Viewing performance metrics

You can display performance metrics from Stat Server. Performance metrics are available on a per agent basis measured over the last five minutes. The available performance metrics are listed in “Appendix A: Resource Management”. The last column indicates the Informiam metrics used to calculate the performance metric.

To view performance metrics for the agents:

1. Click the Column Chooser ( ).
   The Column Chooser dialog displays (Figure 3). The First Name, Last Name, User Id, Status, Time in Status, Reason Code, Agent Groups, and Skills & Levels are grayed out because these columns always display.
2. Select the performance metrics to be displayed.
3. Click OK.
   The performance metrics display to the right of the Skills & Levels column so you must scroll to the right to see them.

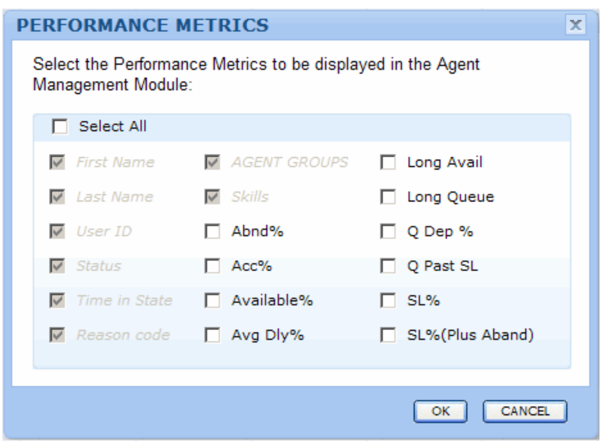

Figure 3: Column Chooser

Managing Skills

With Resource Management you can manage the skills, skill levels, and login status of agents in one place. You can:

- Add, edit or remove skills and skill levels of agents, see “Changing Agents’ Skill and Skill Levels” on page 10. You can apply changes to up to 150 agents at once in a single transaction.
- Log agents off the switch Tserver or SIP server.
- Notify parties of the change to skills, see “Notifying Parties About Changes” on page 12.

Changing Agents’ Skill and Skill Levels

1. Select the agents from the dashboard see “Selecting the Agents to Manage” on page 3.
2. Select the check boxes beside the agents whose skills and levels are to be changed. To select contiguous agents, select one agent check box then shift click on another agent’s check box.

Adding skills and levels

3. To add a skill, under the Action heading, select Add.
   The Skill drop-down list populates with a list of all of the available skills.
4. Select a skill.
5. From the Level drop-down list, select the skill level -- a value between 1 and 10.
   If you assign a skill that the agent already has, the skill level is overwritten. For example, if Diane has French as a skill at level 3, and you re-assign Diane the French skill at level 5, Diane’s French skill level will be overwritten with 5.

Editing skills and skill levels

6. To edit a skill, under the Action drop-down list, select Edit.
   The Skill drop-down list populates with an aggregate list of the skills based on the selected agents. For example, if two agents are selected and the first agent has two skills (English and French) and the second agent has two skills (English and Spanish), then the Skills drop-down list will contain English, French, and Spanish.
7. Either select a skill from the Skill drop-down list or type the skill name in the drop-down box and select one from the limited list.
8. Select a level.
   The selected agents that already have that skill are updated with the new skill level. If a selected agent doesn’t have that particular skill, no changes are made to the agent.

Removing skills

9. To remove a skill, under the Action heading, select Remove.
   The Skill drop-down list populates with an aggregate of the skills based on the selected agents (similar to editing skills).

10. Select the skill to be removed or type the skill name in the drop-down box and select one from the limited list.
    That skill is removed from the selected agents. If a selected agent does not have that skill, no change is made.

Saving changes

11. To save the changes, click Apply.
    A pop-up screen displays for you to confirm that you want to proceed with the action. To see which agents the change is being applied to, select the Show Agents check box.
12. To confirm the change, click OK.
    Once the skills are changed for the selected agents, a confirmation screen displays. The Notification dialog opens. For information about notifications, see “Notifying Parties About Changes” on page 12
    OR
    To return to Resource Management with no changes having taken place, click Cancel.

Changing an Agent’s State

You can change an agent’s stated to logged out.

1. To change the state, select Logged Out from the State drop-down list.
2. Click Apply.
   A pop-up displays for you to confirm the action.
3. To see which agents are going to be logged out, select the Show Agents check box.
4. To confirm the action, click OK.
   The Notification dialog displays. To notify parties of the change of status, see “Notifying Parties About Changes” on page 12
   OR
   To return to Resource Management with no changes having taken place, click Cancel.

Notifications

Resource Management allows you to notify agents, supervisors, and contacts on notification lists about changes to the agents' schedule, unusual events that might occur, or measures being put in place to handle fluctuating call volumes.

Notification Templates

Notification templates are preconfigured messages that provide standard content for e-mails describing the explanation and reasons for the directives and actions taken from Resource Management. Administrators maintain notification templates from the Informiam Administration | Notification Templates page. Messages (not templates) can also be created dynamically while using Resource Management.

Notification Lists

Notification lists are used to inform groups of users within an organization about changes being made to the agents. The notification lists are simply a collection of e-mail addresses. Administrators maintain Informiam/Genesys implementation e-mail addresses for notification lists on the Informiam Administration | Notification Lists page. The addresses and lists are linked to the actions of Resource Management.

If an agent or contact does not have an e-mail address configured, an e-mail is not sent to that agent or contact.

Notifying Parties About Changes

You can notify agents, their supervisors, team leads, and managers after the changes are accepted and implemented on the Genesys (Operational System).

To notify parties about changes:

1. Under Notifications, click New.
   The Notifications dialog opens (Figure 4).
2. For the notification message, either select an existing notification template from the Select Template list.
   The message details display. You can edit the message; however, it cannot be saved.

   OR

   Create a notification message by typing a template name in the Create Template field.

   a) To add the notification to the template and the list for future use, select the check box.
3. To send the notification to the affected agents and their supervisors, select the Notify Affected Parties check box.
   The supervisors of the agents will only get one notification per skill group. For example, if you change the states of Agents 1, 2, 3, and 4, and Agents 1 and 2 are part of Skill Group A and Agents 3 and 4 are part of Skill Group B, the supervisor of Skill Group A will receive only one notification stating that the states of Agents 1 and 2

have been changed. The same will apply for the supervisor of Skill Group B. If both skill groups have the same supervisor, then that person will receive two notifications, one for changes in Skill Group A and one for the changes in Skill Group B.
In order for the notifications to be sent to the supervisor of an agent, the skill group that contains that agent must have a supervisor listed in its configuration.

4. To send a notification to people on a list, select the Notify Lists check box and select the lists.
5. Optionally, add an additional message for those on the notifcation lists.
6. Click Send.
The notification is sent and a confirmation screen displays (Figure 5).

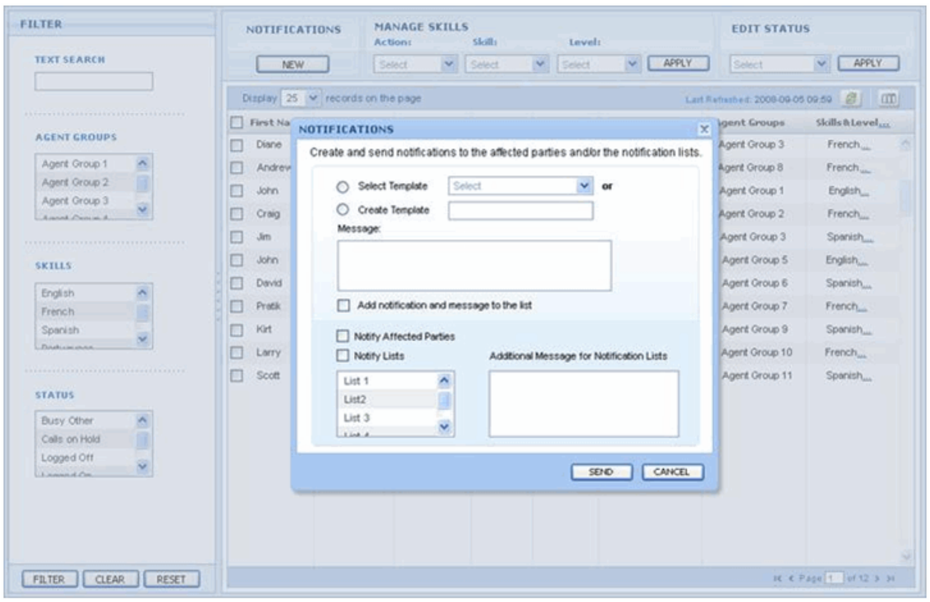

Figure 4: Notifications dialog

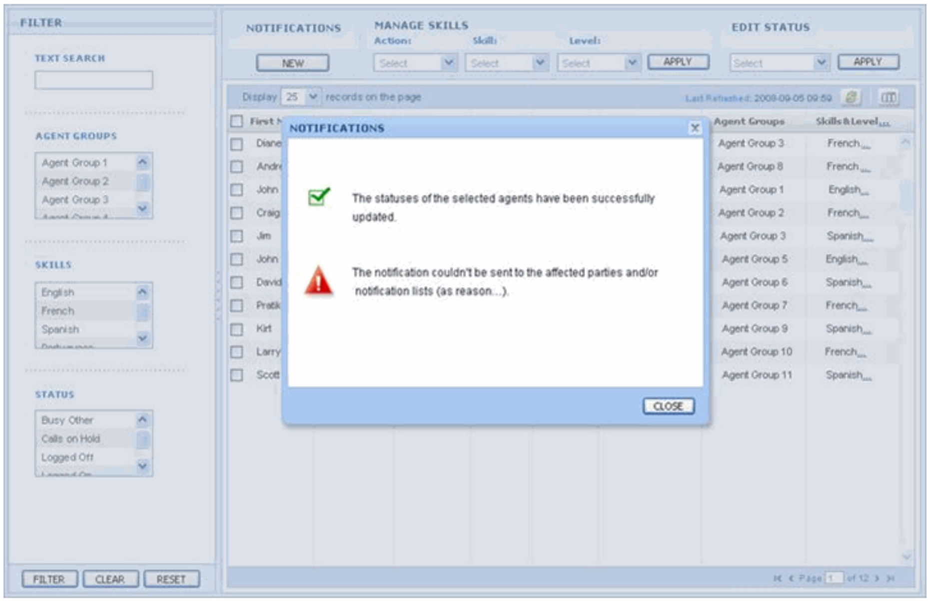

Figure 5: Notifications confirmation

7. To return to Resource Management, click Close.
   The confirmation message closes. The agents affected by the change display at the top of the list highlighted. If a skill was added or edited, then that skill displays in boldface for all the affected agents.

The following table shows the possible messages that can be displayed in the confirmation window for the status of the notifications.

Type	Updates	Message Displayed
Skills/Status Changes	Successful	The notification has been successfully sent to the selected agent(s), their supervisors, and the selected notification list(s).
Skills/Status Changes	Failed for agents only	The notification was sent to the supervisor(s) and the selected notification list(s), but could not be sent to the selected agent(s).
Skills/Status Changes	Failed for agents and supervisors.	The notification was sent to the selected notification list(s), but could not be sent to the selected agent(s) and their supervisors.
Skills/Status Changes	Failed for supervisors and lists	The notification was sent to the selected agents(s), but could not be sent to the supervisors and the selected notification list(s).
Skills/Status Changes	Failed for supervisors only	The notification was sent to the selected agents(s) and notification list(s), but could not be sent to the supervisors.
Skills/Status Changes	Failed for lists only	The notification was sent to the selected agents(s) and their supervisors, but could not be sent to the selected notification list(s).
Skills/Status Changes	Failed	The notification could not be sent out.

Appendix A: Resource Management

Performance Metric	Acronym	Description	Formula (in terms of Informiam metrics)
Accessibility %	ACC%	Accessibility % is a productivity metric that compares, for an agent, the total calls offered to handled.	CallsAnsweredTo5 / CallsOfferedTo5
Average After Call Work	AvgACW	Work that is required of an agent immediately following an inbound call in seconds during the selected interval. This often includes entering data, filling out forms and making outbound calls necessary to complete the transaction. The agent is considered unavailable to receive another inbound call while in this mode.	WorkReadyTimeTo5 / CallsHandledTo5
Average Handle Time	AHT	Average handle time in seconds for calls to the agent during the current interval.	(TalkTimeTo5 + WorkReadyTimeTo5) / CallsHandledTo5
Average Talk Time	ATT	Average talk time in seconds for calls to the agent ending during the current interval.	TalkTimeTo5 / CallsHandledTo5
Handle Time	HT	Total handle time in seconds for calls to the agent ending during the selected interval.	TalkTimeTo5 + WorkReadyTimeTo5
Outbound	COT	Number of outbound calls by agents during the selected interval.	CallsOutTo5
Actual NCH	ANCH	Number of actual calls handled.	CallsHandledTo5
Actual NCO	ANCO	Number of actual contacts offered.	CallsOfferedTo5
Actual Staffed Time	STFT	Total amount of available time, where available time includes talk, wrap, and ready/available.	LoggedOnTimeTo5 – NotReadyTimeTo5

Appendix B: Relationship between Informiam metrics and Genesys Stat Server metrics

This table describes the relationship between the metrics in Contact Center Advisor and Workforce Advisor and the metrics in Genesys Stat Server, including what time profiles and time ranges are included as part of the statistic.

The distinction between Informiam metrics and Genesys Stat Server metrics is that Informiam metrics are formed using the Genesys Stat Server metrics in conjunction with a time range, a time profile, and a filter. Informiam metrics can be considered as a layer above the Stat Server metrics. These metrics are defined within the Genesys Adapter.

Informiam Metric	Stat Server Metric	Time Profile	Time Range
CallsAnsweredTo5	Informiam.CallsAnswered	Last5Mins	N/A
CallsHandledTo5	Informiam.Interactions_Processed	Last5Mins	N/A
CallsOfferedTo5	Informiam.CallsOffered	Last5Mins	N/A
CallsOutTo5	Informiam.CallsOutbound	Last5Mins	N/A
LoggedOnTimeTo5	Informiam.Total_Logged_In_Time	Last5Mins	N/A
NotReadyTimeTo5	Informiam.Total_Not_Ready_Time	Last5Mins	N/A
TalkTimeTo5	Informiam.Total_Talk_Time	Last5Mins	N/A
WorkReadyTimeTo5	Informiam.Total_ACW_Time	Last5Mins	N/A

Appendix C: Stat Server metric definitions

Some Stat Server metric definitions are the same as the existing ones within the Stat Server, some are different, and some are not present. Customers must upload a file containing the Stat Server metrics required for the Informiam metrics to the dedicated Informiam Stat Server and overwrite all existing entires. All Stat Server metrics used by Informiam are prepended with the Informiam namespace (as shown in the table above).

Stat Server Metric	Definition
Informiam.CallsAnswered	Category=TotalNumber MainMask=CallAnsweredInbound, CallAnsweredUnknown Objects=Agent, Place, GroupAgents, GroupPlaces Subject=DNAction
Informiam.CallsOffered	Category=TotalNumber MainMask=CallAnsweredInbound, CallAnsweredUnknown, CallAbandonedFromRingingInbound, CallAbandonedFromRingingUnknown Objects=Agent, Place, GroupAgents, GroupPlaces Subject=DNAction
Informiam.CallsOutbound	Category=TotalNumber MainMask=CallOutbound Objects=Agent, Place, GroupAgents, GroupPlaces Subject=DNAction
Informiam.Interactions_Processed	Category=TotalNumber MainMask=InteractionHandling Objects=Agent, Place, GroupAgents, GroupPlaces Subject=Action
Informiam.Total_ACW_Time	Category=TotalTime MainMask=AfterCallWork Objects=Agent, Place, GroupAgents, GroupPlaces Subject=DNAction

Stat Server Metric	Definition
Informiam.Total_Logged_In_Time	Category=TotalTime MainMask=*, ~LoggedOut, ~NotMonitored Objects=Agent, Place, GroupAgents, GroupPlaces Subject=DNAction
Informiam.Total_Not_Ready_Time	Category=TotalTime MainMask=NotReadyForNextCall Objects=Agent, Place, GroupAgents, GroupPlaces Subject=DNAction
Informiam.Total_Talk_Time	Category=TotalTime MainMask=CallInbound, CallUnknown Objects=Agent, Place, GroupAgents, GroupPlaces Subject=DNAction

Appendix D: Agent metrics from Contact Center Advisor

- Accessibility % (ACC%)
- Answered (ANS)
- Average After Call Work (AvgACW)
- Average Handle Time (AHT)
- Average Talk Time (ATT)
- Handle Time (HT)
- Handled (CH)
- Outbound (COT)

Appendix E: Agent metrics from Workforce Advisor

- Actual NCH (ANCH)
- Actual NCO (ANCO)
- Actual Staffed Time (STFT)
- Agent metrics from FA are as follows
- Current Skill Group
- Current Application
- Inbound calls handled
- Average Wrap time
- Calls Transfered
- Longest Wrap
- Longest Call