Performance Management Advisors 8.0

Alert Management

User's Guide

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Document Version: 80pma_us_am_06-2010_8.0.001.00

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Preface

Welcome to the *Genesys Performance Management Advisors 8.0 Alert Management User's Guide*. This document describes how to use the Alert Management features of the Genesys Performance Management Advisors (PMA) solution.

This document is valid only for the 8.0 release of this product.

Note: For versions of this document created for other releases of this product, visit the Genesys Technical Support website, or request the Documentation Library DVD, which you can order by e-mail from Genesys Order Management at `orderman@genesyslab.com`.

This preface contains the following sections:

For information about related resources and about the conventions that are used in this document, see the supplementary material starting on page 35.

About Alert Management

Overview

Contact Center Advisor (CCAdv) and Workforce Advisor (WA) provide a real-time display of contact center activity and workforce management for contact centers throughout the enterprise. Predefined alerting conditions on applications, call types, and contact groups are established to display alerts on the dashboard, as well as to notify designated contacts.

With Alert Management, you can record the action taken to resolve one or more alerts, as well as the results of that action. You can record each action in a separate report. These key action reports create a knowledge base that helps to identify repetitive patterns and resolve future violations more rapidly.

Alert Management Tab

The `Alert Management` tab displays a table of alerts and a table of key action reports, which enable you to determine the following:

- The best action to resolve a violation
- The key action reports for which you are responsible
- The key action reports for one or more alerts
- The alerts for one or more key action reports
- The alerts that do not have associated key action reports

The Map displays all alerts, active and inactive. Only active alerts will display on the `Alert Management` tab of the CCAdv and WA dashboards.

Action Management Reports Page

You can open the `Action Management Reports` page from either the Map for one alert, from the `Alerts` pane chevron for a single alert, or from the `Alert Management` tab for one or more alerts. You can only open this page for alerts that you have permission to see. Your permission to see an alert is based on your permission to see application groups and call centers. From this page, you can add key action reports to the alerts.

You can also add a key action report which has no associated alert—for example, for a preventative action. You can only do this from the Alert Management tab. To maintain existing key action reports, you must open the `Action Management Reports` page from the `Alert Management` tab.

For more information about the `Alert Management` tab, see Chapter 1, “Alert Management,” on page 11.

For more information about the `Action Management` page click `Help` on the `Alert Management` tab. See Chapter 2, “Action Management Reports,” on page 21.

Intended Audience

This document is primarily intended for end users of the Alert Management features of Contact Center Advisor and Workforce Advisor.

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Chapter

1 Alert Management

This chapter describes how to use the features of Alert Management. This chapter contains the following sections:

Alert Management Tab

The `Alert Management` tab (Figure 1) displays a table of key action reports and a table of alerts. Which alerts are displayed depends on your user permissions. The key action reports time and date display in the time zone selected by the author of the key action report.

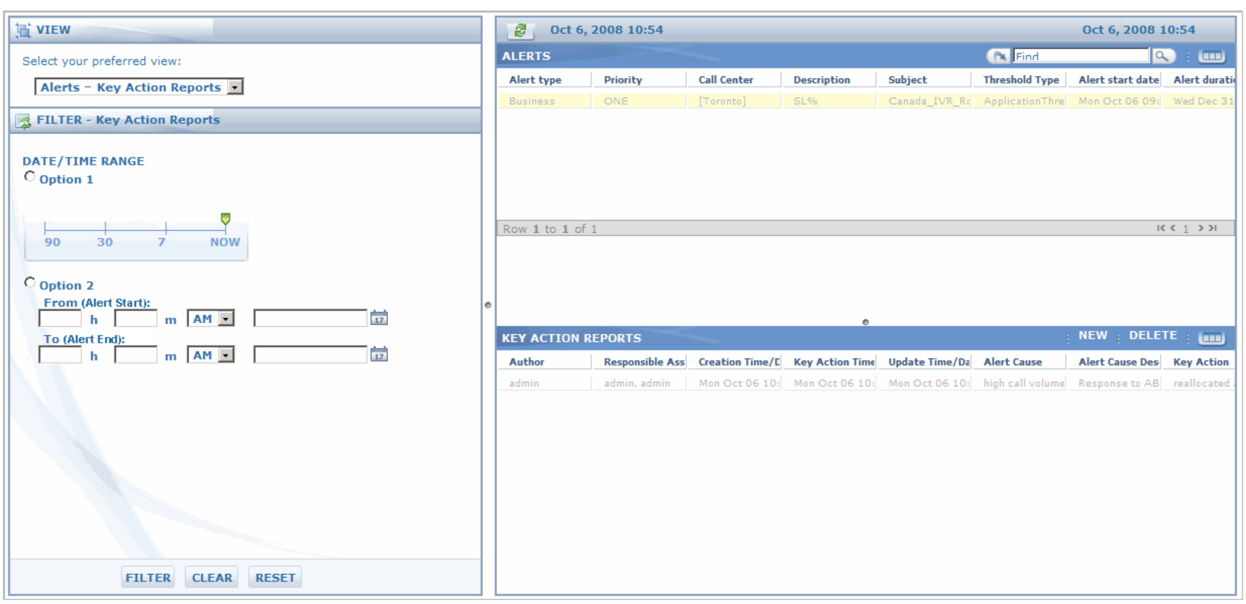

Figure 1: Alert Management Tab

From the `Alert Management` tab, you can:

- Assess the success of the actions taken and learn what action to take for future similar alerts.

  See “Displaying the Key Action Reports for an Alert” on page 16.
- View the details of the alerts associated with a key action report.

  See “Displaying the Alerts for a Key Action Report” on page 16.
- Delete a key action report.

  See “Deleting Key Action Reports” on page 17.
- Filter the rows in either the `Alerts` pane or the `Key Action Reports` pane by date or text search.

  See “Filters” on page 18.
- Clear the date filter in either the `Alerts` pane or the `Key Action Reports` pane by clicking `Clear`.
- Add a new Key Action Report by clicking `New`.
- Open the `Action Management` page to:
  - Enter the details of the key action taken to resolve one or more rule violations. See “Adding a Key Action Report from the Map” on page 24.
  - Delete an alert from an existing key action report. “Modifying a Key Action Report” on page 26
  - Display or edit a key action report. See“Modifying a Key Action Report” on page 26 .

Key Action Reports Table

From the `Key Action Reports` table you can:

- Select a key action report to highlight its associated alerts.
- Select an alert to highlight its associated key action reports.

The details of a key action report are described in “Action Management Reports” on page 21.

Alerts Table

The details of the `Alerts` table are described in Table 1 on page 13.

Table 1: The Alerts Table—Field Descriptions

Attribute	Description
Alert Type	Indicates the type of the alert: (`B`) Business (`T`) Technical
Priority	Indicates the alert priority: `1` (displays red on the dashboard) `2` (displays yellow on the dashboard)
Description	The description of the problem. For a threshold alert the description is the metric name and metric value. For a technical alert the description is the text: `peripheral offline`.
Subject	The name of the entity generating the alert. For a business alert, the subject is the name (or descriptive name, if available) of the application, call type, or contact group. For a technical alert, the subject is the name of an offline peripheral related to the peripheral gateway.
Threshold Type	`Contact Group, Application, PG Offline`
Contact Centers	The contact center affected by the alert.
Start Time/Date/Time Zone	Date, time and time zone when the alert started. The format is: `mm/dd/yyyy ##h:##m`
Alert Duration	The duration of the alert from the time the alert started to the time the alert expired, or to the current time if the alert is still active. The format is: `##h:##m`
Status	The alert status (active or expired).
Max Violation	The maximum violation is the maximum difference between the acceptable threshold value and the worst value violated since the alert started. The maximum violation applies from the start of the alert. For a peripheral offline alert, the message `N/A` is displayed.

Table 1: The Alerts Table—Field Descriptions (Continued)

Attribute	Description
Threshold	The value used to calculate the maximum violation.The maximum violation is the maximum difference between the acceptable threshold value and the worst value violated since the alert started.
Value at Max Violation	The highest or lowest value of the violation (depending on the rule). Max violation is the difference between worst that the rule was violated and the closest acceptable level. If the acceptable threshold is `80%` and the worst value was `70%`, the max violation is `10`. The maximum violation is based on the value at the time of the start of the alert. For aperipheral offline alert, `N/A` is displayed.
End Date/Time/Time Zone	The date and time at which the alert expired. The format is: `mm/dd/yyyy ##h:##m`
Reporting Region	For a threshold violation alert, the reporting region of the application, call type or contact group.
Operating Unit	For a threshold violation alert, the operating unit of the application, call type or contact group.
Geographic Region	For a threshold violation alert, the geographic region of the application, call type or contact group.
Application Group	For a threshold violation alert, the application group of the application, call type or contact group.

Table 1: The Alerts Table—Field Descriptions (Continued)

Attribute	Description
Source System	For WA, the source system property is the name of the forecast data source supplied in the data input from the following supported Workforce Management systems: • IEX Total View • Aspect eWFM • Genesys Workforce Management • Pipkins Each system can supply multiple data sets, resulting in multiple source system names. Examples of the Source System content are: • `iex1` • `iex2` • `aspect` • `pipkins1`. For CCAdv, the source system property is the internal name given to the external source system when you configured CCAdv.
Primary Alert	If the key action report is associated with an alert, the alert details are saved when the report is saved. If multiple alerts are associated, one of the alerts must be marked primary.

View Options

By default, the `Key Action Reports` table displays above the `Alerts` table and is filtered to the key action reports for the current day. For more information on filtering see "Filters" on page 18.

The `Alerts` table is empty until you select a key action report. In other words, the lower table is empty until you select a row in the upper table. You can change the table orientation by selecting the `View` option:

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

Permissions

You can see all key action reports except those whose associated alerts you do not have permission to see. All users can view key action reports which have no associated alerts.

Note: Contacts who are *not* users cannot view or maintain key action reports. Since a contact may be a responsible assignee, that contact will require the report's author to notify them and to make any updates to the key action report.

Displaying the Key Action Reports for an Alert

When you select one or more key action reports, multiple alerts might be displayed. To identify which alerts are associated with a particular key action report, click on that key action report. The associated alerts in the `Alerts` table are highlighted in a secondary color.

Procedure:
Displaying the key action reports for an alert

Purpose: To display the key action reports for an alert or multiple alerts in order to assess the success of the actions and learn what action to take for similar alerts in future.

Start of procedure

1. Select the view `Alerts - Key Action Reports`. The `Alerts` table displays above the `Key Action Reports` table.
2. Select one of the following:
   - A single row
   - Multiple individual rows byholding down the CRTL key and clicking on the individual rows to be selected
   - A contiguous block of rows by using clicking the first row in the block then holding down the SHIFT key clicking on the last row in the block

   The `Key Action Reports` table displays the actions for the selected alert(s).

End of procedure

Displaying the Alerts for a Key Action Report

You can select one or more alerts, which may cause multiple key action reports to be displayed.

Procedure:
Displaying the alerts for a key action report

Purpose: To view the details of the alerts associated to a key action report.

1. Select the view, `Key Action Reports - Alerts`. The `Key Action Reports` table displays above the `Alerts` table.
2. Select the key action report row(s) in the `Key Action Reports` table. The `Alerts` table displays the alert(s) for the selected key action report(s). The context displays the key action name (that is, the selected value).

End of procedure

Deleting Key Action Reports

Procedure:
Deleting key action reports

Purpose: From the `Alert Management` tab, you can delete key action reports.

Start of procedure

1. Select the view `Key Action Reports - Alerts`.
   The `Key Action Reports` table displays above the `Alerts` table.
2. Select one of the following:
   - A single row
   - Multiple individual rows by holding down the CRTL key and clicking on the individual rows to be selected
   - A contiguous block of rows by using clicking the first row in the block then holding down the SHIFT key clicking on the last row in the block
3. Click `Delete`. The `Key Action Reports` table refreshes.

End of procedure

Sorting the Rows

In the `Alerts` table, the default sort order is ascending by the description. In the key action reports table, the default sort order is ascending by the key action name. For more information, see page 32.

Refreshing the Data

The status of alerts may change frequently and other users may also be creating key action reports. You must click `Refresh` to update the `Alerts` and `Key Action Reports` tables with the most up-to-date information. Refreshing applies to both tables. For more information, see page 32.

Personalized Settings

Logging in and out retains the selected `Alerts - Key Action Reports` view and date/time filter setting, as well as other settings. For more information, see page 34.

Filters

You can filter the rows by one of two date/time range filter options, as well as by a text search. To apply the filter, click the `Filter` button. Filtering refreshes only the table on top. After filtering, the table on the bottom displays no items until a row in the table is selected. For the text search, see "Searching for a Row with Text" on page 32.

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

The current status of the record always displays.

Filtering alerts by dates and times compares the dates and times to the start time and end time of the alert. If the alert is still active, then instead of using the alert's end time, the filter uses the current time on the server. If any instant between the alert's start and end time falls within the range specified by your filter's dates and times, then the filter will include the alert in its output.

Filtering key action reports by dates and times compares three date and time properties of a key action report to the dates and times in the filter. It compares the key action date and time, the creation date and time, and the last updated date and time. If any of those dates and times within the range specified by your filter's dates and times, then the filter will include the key action report in its output.

Time Zones

You can create Key Action Reports for different time zones.

Whereas alerts display a timestamp based on your user permissions and the time zone of your local server, key action reports display a timestamp related to the time zone in which the report was created.

Filtering by the timescale (Option 1)

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

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

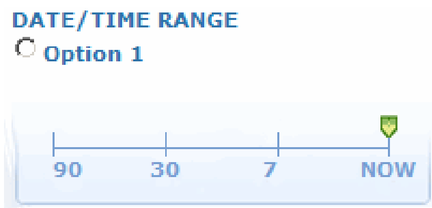

Figure 2: Filtering by Timescale (Option 1)

Filtering by specifying dates (Option 2)

Figure 3: Filtering by Dates (Option 2)

You can filter by specifying the start date/time and the expiration date/time—this filter includes data from within that interval.

Chapter

2 Action Management Reports

This chapter describes the actions you can take from the `Action Management Reports` page. This chapter contains the following sections:

Action Management Page

The `Action Management` page is shown in Figure 4 on page 22. From the `Action Management` page, you can:

- Enter the details of the key action taken to resolve a rule violation. See “Adding a Key Action Report from the Map” on page 24.

Sections

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

- `Alerts`—The current values of the alert selected on the Contact Center Advisor or Workforce Advisor map or the `Alert Management` tab.
- `Key Action Reports`—A table of the existing key action reports.
- `Key Action Report Details`—The details of the key action report.
- `Follow Up`—The results of the action taken and the lessons learned.

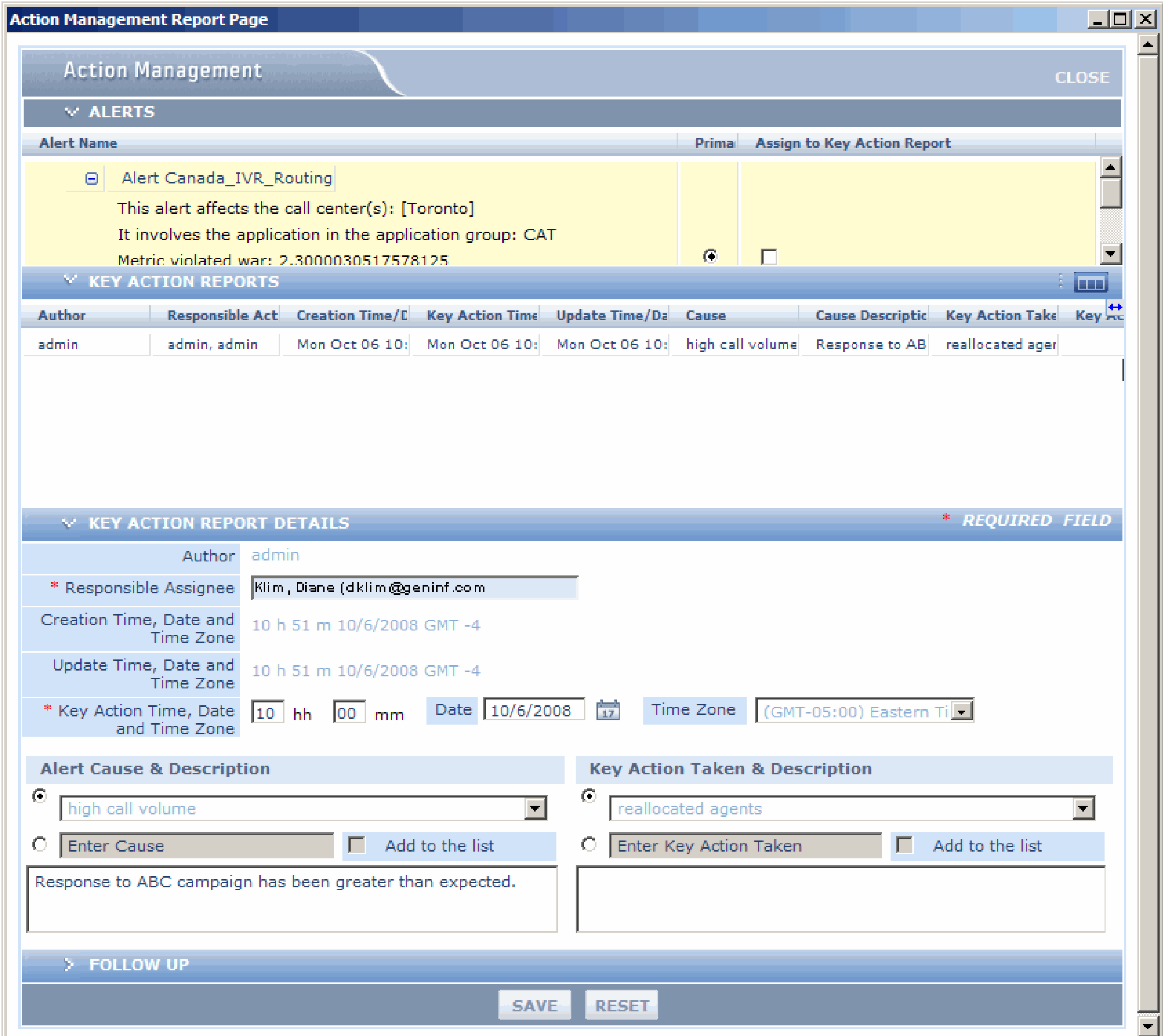

Figure 4: Action Management Page

The details of a key action report are described in Table 2.

Table 2: Key Action Report—Field Descriptions

Parameter	Description
`Author`	(Display only): The user who creates the key action report.
`Responsible Assignee`	The contact who carries out the action. The default is the author's last name, first name, and e-mail address. The responsible assignees are not notified when they are assigned to an action.

Table 2: Key Action Report—Field Descriptions (Continued)

Parameter	Description
`Creation Time/Date/Time Zone`	(Display only): The system time at which the key action report is saved.
`Key Action Time/Date/Time Zone`	When the action was actually taken. The default is the creation time, date, and time zone.
`Update Time/Date/Time Zone`	(Display only): The system time at which the key action report is updated
`Alert Cause`	The cause of the alert
`Alert Cause Description`	(Optional): A description to elaborate on the selected alert cause.
`Key Action Taken`	The action taken to resolve the alert violation.
`Key Action Description`	(Optional): A description to elaborate on the selected key action taken.
`Results of Action Taken`	(Optional): A description for the result.
`Lessons Learned`	(Optional): A description for the lessons learned.
`Success Rating`	A rating for the success of the key action. Providing a value for the success rating indicates that the key action report is complete. The values are `3, 2, 1, 0, -1, -2`, and `-3`; where `3` indicates that the key action is successful, `0` indicates that the key action had no effect, and `-3` indicates that bthe key action had a negative effect.
`Success Time`	The amount of time it took for the action to have a successful impact; that is, the violation end time and date minus the key action start time and date—where the key action has a success rating of `1`, `2` or `3`. The format is `hh:mm:ss`. If the violation end time and date are not available, the value `NA` is displayed. If the start time of the key action is earlier than the end time of the violation, a negative value is displayed.

Table 2: Key Action Report—Field Descriptions (Continued)

Parameter	Description
`Primary Alert`	If the key action report is associated to an alert, the alert details are saved when the report is saved. If multiple alerts are associated, one of the alerts must be designated primary.
`# of Associate Alerts`	The number of alerts associated to the key action report. This parameter is particularly useful if you do not have permission to see all of the alerts associated to a key action report. If you do not have access to the primary alert, the primary alert values are not displayed.

Adding a Key Action Report from the Map

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

Procedure:
Adding a key action report from the Map

Purpose: To add a key action report that records the action taken to resolve an alert violation and the results of that action.

Start of procedure

1. On the Map pane, either:
- Double-click in the carousel on a tile representing a Contact Center alert, or;
- From the `Alerts` pane, click the arrow icon in the top right corner of the entry for an alert.

The `Action Management` page is displayed with default values where configured. The alert is automatically set as the primary alert.

Note: When an alert is for a network contact center and a skill-group contact center that share the call type, both the network contact center and a skill-group contact center display an alert on the map. When you click either tile, the summary indicates both contact centers because the alert that either tile represents is the same underlying alert.

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2. Enter the first few letters of the responsible assignee's last name and select a name. The last name, first name and e-mail address are displayed.
3. Specify when the key action was performed in the `Key Action Time`, `Date`, and `Time Zone` fields.

   The time format is `hh:mm` using the 24-hour clock. The date format is `MM/DD/YYYY` or you can select a date by using from the calendar icon. The default is the current system time, date and time zone of your server.
4. Either select a cause from the `Cause` drop-down list or type one in the `Cause` field. The cause name must be unique and is not case-sensitive.
5. To suggest that the cause you typed in the `Cause` field should be available for future selection from the `Cause` drop-down list, select the `Add to List?` check box.

   The cause will display in the `Causes` table on the `Administration Alert Causes` page for an administrator to approve.
6. Optionally, provide more details for the cause in the `Alert Cause Description` text box.

   An alert cause must be specified in order to enter a description. The text-box limit is 256 characters.
7. Either select a key action from the `Key Action Taken` drop-down list or type one in the `Key Action` field. The key action name must be unique and is not case-sensitive.
8. To suggest that the key action you typed in the `Key Action Taken` field should be available for selection in the future from the `Key Action Taken` drop-down list, select the `Add to List?` check box.

   The key action taken displays in the `Key Actions Taken` table on the `Administration Key Actions` page for an administrator to approve.
9. Optionally, provide more details for the key action in the `Key Action Taken Description` text box.

   A key action must be specified in order to enter a description. The text-box limit is 256 characters.
10. Enter a description of the results of the action taken in the `Results of Action Taken` text box.

Once the key action report is saved, the description cannot be edited. The text-box limit is 256 characters.

11. Enter a description of the positive or negative results of the action taken in the `Lessons Learned` text box.

    The text box limit is 256 characters.

12. To rate the success of the action taken, select a rating from the `Success Rating` drop-down list.

13. To save the key action report, click `Save`.
    The `Action Management` page closes and the Dashboard is displayed.

End of procedure

Note: The Action Management Report (AMR) page can also be launched from a metric threshold violation alert, or a peripheral gateway offline alert, by clicking on the arrow icon in the upper right of the alert box. The alerts table on the AMR page is populated with the information from the alert where the AMR is launched from.

Modifying a Key Action Report

You can modify a key action report to make corrections or to complete the `Follow Up` section. The key action and the result of action taken are the only non-editable data. When an existing key action report is opened, the alerts in the `Alerts` section display current values.

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

Procedure:
To modify the details of a key action report

Start of procedure

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

2. Select `Edit` for a key action report.

   The Action Management Reports page displays the key action report details .

3. To remove an alert from a key action report, in the `Alerts` section clear the `Assign to Key Action Report` check box.
4. Type the first few letters of the responsible assignee's last name and select a name. The last name, first name and e-mail address are displayed.
5. Specify when the key action was performed in the `Key Action Time`, `Date`, and `Time Zone` fields.

   The time format is `hh:mm` using the 24-hour clock. The date format is `MM/DD/YYYY` or you can select a calendar by using the `Calendar` icon. The default is the current system time, date and time zone of your server.
6. Either select a cause from the `Cause` drop-down list or enter one in the `Cause` field. The cause name must be unique and is not case-sensitive.
7. To make the cause you entered in the `Cause` field available for selection in the future from the `Cause` drop-down list, select the `Add to List?` check box.

   The cause will display in the `Causes` table on the `Administration Alert Causes` page for an administrator to approve.
8. Optionally, provide more details for the cause in the `Alert Cause Description` text box.

   An alert cause must be specified in order to enter a description. The text box limit is 256 characters.
9. To make the key action you entered in the `Key Action Taken` field available for selection in the future from the `Key Action Taken` drop-down list, select the `Add to List?` check box.

   The key action taken will display in the `Key Actions Taken` table on the `Administration Key Actions` page for an administrator to approve.
10. Optionally, provide more details for the key action in the `Key Action Taken Description` text box.

    A key action must be specified in order to enter a description. The text box limit is 256 characters.
11. Enter a description of the positive or negative results of the action taken in the `Lessons Learned` text box.

    The text box limit is 256 characters.
12. To rate the success of the action taken, select a rating from the `Success Rating` drop-down list.
13. To save your information, click `Save`.

The `Action Management Reports` page closes and the `Alert Management` tab displays. The key action report displays and is highlighted in the `Key Action Reports` pane.

End of procedure

Note: Alerts added to an existing key action report are secondary alerts.

Chapter

3 UI Functionality

This chapter describes how to use generic user interface (UI) functionality. It contains the following sections:

Generic Actions

The generic procedures include:

- “Adding a New Item” on page 29.
- “Editing an item” on page 30.
- “Deleting an Item” on page 31 and “Deleting Multiple Items” on page 31.
- “Resetting the Details for an Item” on page 32.
- “Searching for a Row with Text” on page 32, including
  - “Displaying all Rows in a Table” on page 32
- Display options
  - “Sorting Rows” on page 32.
  - “Choosing which Columns Display in a Table” on page 32.
  - “Reordering Columns” on page 33.
  - “Refreshing the Data in a Table” on page 34.
  - “Increasing and Decreasing a Column Width” on page 34.
  - “Resizing the Panes” on page 34.
  - “Persisting Settings from Session to Session” on page 34.

Adding a New Item

Some new items must be associated to other items using `Available` and `Selected` list boxes.

For example:

- Application groups and contact centers are selected for user permissions. If you select individual items, you will have to manually assign any items added in the future. Selecting the `Select All` check box assigns all existing items and automatically assigns any added in the future.
- Contacts are selected for distribution lists.
- Skill groups are selected for rollups.
- Contact Centers are selected for load-balance rules and manual alerts

Procedure: Adding a new item

Start of procedure

1. If the details section is not empty, click `New`. A blank form displays in the details section. No row is highlighted in the table.
2. Add the details. The `Save` button is enabled.
3. Click `Save`.
   The new item displays in the table highlighted, visible, and according to the currently selected sort order.

End of procedure

Editing an item

Procedure: Editing an item

Start of procedure

1. Highlight a row in the table by clicking it. The details display in the `Details` section.
2. Edit the details, then click `Save`.

End of procedure

Editing multiple items

Note: Not available in Alert Management.

Multiple items can be edited at once—For example, on the `Rollups` page, `Skill Groups` page, and `Contact Groups` page.

Procedure: Editing multiple items

Start of procedure

1. From the table, select and highlight multiple rows using CTRL/click for individual rows or SHIFT/click for contiguous rows.
2. Click `Edit`. The details are displayed, apart from the `Descriptive Name` field, which is hidden; and the text `Multiple Edits` is displayed in red.
3. Edit the details, then click `Save`. A confirmation window is displayed: `Do you want to save multiple edits?`.
4. To confirm, click `OK`.

End of procedure

Deleting an Item

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

Procedure: Deleting an item

Start of procedure

1. In the table, highlight a row, then click `Delete`. A confirmation dialog displays: "`Do you want to delete the selected item?`”.
2. Click `Yes` to remove the item from the table.
   Click `No` to cancel the deletion.

End of procedure

Deleting Multiple Items

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

Procedure: Deleting multiple items

Start of procedure

1. Select multiple rows using CTRL+ CLICK for individual rows or SHIFT + CLICK for contiguous rows.
2. Click `Delete`. A confirmation dialog displays: `Do you want to delete the selected items?`.
3. Click `Yes` to remove the items from the table.
   Click `No` to cancel the deletion.

End of procedure

Resetting the Details for an Item

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

Searching for a Row with Text

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

Enter the search text in the `Search` field and click the `Search` button. The field is not case sensitive and will search for characters within a word. The table displays the rows with matching search criteria.

Displaying all Rows in a Table

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

Sorting Rows

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

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

Choosing which Columns Display in a Table

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

Procedure:
Choosing which columns to display in the table

Purpose: This applies to Alert Management and Resource Management only.

Start of procedure

1. Click the Columns button. The `Available Columns` window opens.

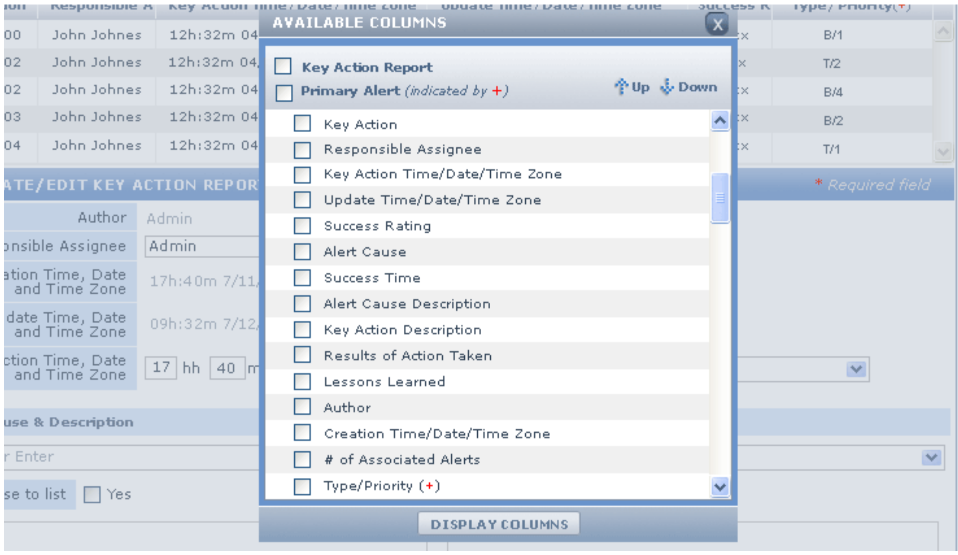

Figure 5: Available Columns

2. Select or clear the items' check boxes. Selecting `All` selects all items in the next level.
3. Click `Display Columns`. The selected columns display in the table.

End of procedure

Reordering Columns

To reorder the columns, either:

- Drag the column headings in the table, or;
- In the `Available Columns` window, select individual or multiple columns and click the `Up` or `Down` button then click `Display Columns`.

Note: Not universally available.

Refreshing the Data in a Table

To refresh the table, click the `Refresh` button or `F5`. The `Refresh` button is always enabled. Refreshing preserves the following:

- Relative sizes of the upper and lower panes
- Selected columns
- Column sizes and positions
- Sort order
- Scrolled position

Increasing and Decreasing a Column Width

To adjust the width of individual columns, drag the edge of the column. Ellipses indicate that the text is cut off and hovering over the column displays the full name in a ToolTip.

Resizing the Panes

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

Move a splitter to resize the panes.

Persisting Settings from Session to Session

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

The preferences are stored with the users credentials.

Supplements

Related Documentation Resources

The following resources provide additional information that is relevant to this software. Consult these additional resources as necessary.

Performance Management Advisors

- *Performance Management Advisors 8.0 Platform Deployment Guide* describes how to install and configure the Advisor Platform.
- *Performance Management Advisors 8.0 Frontline Advisor Deployment Guide* describes how to install and configure Frontline Advisor.
- *Performance Management Advisors 8.0 Cisco Adapter Deployment Guide* describes how to configure and install the Cisco Adapter.
- *Performance Management Advisors 8.0 Genesys Adapter Deployment Guide* describes how to configure and install the Genesys Adapter.
- *Performance Management Advisors 8.0 Contact Center Advisor Workforce Advisor Deployment Guide* describes how to configure and install Contact Center Advisor Workforce Advisor.
- *Performance Management Advisors 8.0 Contact Center Advisor & Workforce Advisor Administrator User's Guide* describes how to perform administration functions for Contact Center Advisor and Workforce Advisor.
- *Performance Management Advisors 8.0 Contact Center Advisor User's Guide* describes how to use Contact Center Advisor agent features.
- *Performance Management Advisors 8.0 Workforce Advisor User's Guide* describes how to use Workforce Advisor agent features.
- *Performance Management Advisors 8.0 Frontline Advisor Administrator User's Guide* describes how to perform administration functions for Frontline Advisor.
- *Performance Management Advisors 8.0 Frontline Advisor Manager User's Guide* describes how to perform manager functions for Frontline Advisor.

- *Performance Management Advisors 8.0 Frontline Advisor Agent User's Guide* describes how to perform agent functions for Frontline Advisor.
- *Performance Management Advisors 8.0 Alert Management User's Guide* describes how to manage alerts and responses.
- *Performance Management Advisors 8.0 Resource Management User's Guide* describes how to maintain skill levels and agents.
- *Performance Management Advisors 8.0 Performance Monitor User's Guide* summarizes how to use the Performance Monitor tool.
- *Performance Management Advisors 8.0 Workforce What-If Tool User's Guide* describes and gives examples of scenarios that illustrate how to adjust resource levels to achieve optimal outcomes.

Genesys

- *Genesys Technical Publications Glossary*, which ships on the Genesys Documentation Library DVD and which provides a comprehensive list of the Genesys and computer-telephony integration (CTI) terminology and acronyms used in this document.
- *Genesys Migration Guide*, which ships on the Genesys Documentation Library DVD, and which provides documented migration strategies for Genesys product releases. Contact Genesys Technical Support for more information.
- Release Notes and Product Advisories for this product, which are available on the Genesys Technical Support website at `http://genesyslab.com/support`.

Information about supported hardware and third-party software is available on the Genesys Technical Support website in the following documents:

- *Genesys Supported Operating Environment Reference Manual*
- *Genesys Supported Media Interfaces Reference Manual*

Consult these additional resources as necessary:

- *Genesys Hardware Sizing Guide*, which provides information about Genesys hardware sizing guidelines for Genesys releases.
- *Genesys Interoperability Guide*, which provides information on the compatibility of Genesys products with various Configuration Layer Environments; Interoperability of Reporting Templates and Solutions; and Gplus Adapters Interoperability.
- *Genesys Licensing Guide*, which introduces you to the concepts, terminology, and procedures relevant to the Genesys licensing system.

For additional system-wide planning tools and information, see the release-specific listings of System Level Documents on the Genesys Technical Support website, accessible from the `system level documents by release` tab in the Knowledge Base `Browse Documents` Section.

Genesys product documentation is available on the:

- Genesys Technical Support website at http://genesyslab.com/support.
- Genesys Documentation Library DVD, which you can order by e-mail from Genesys Order Management at orderman@genesyslab.com.

Document Conventions

This document uses certain stylistic and typographical conventions—introduced here—that serve as shorthands for particular kinds of information.

Document Version Number

A version number appears at the bottom of the inside front cover of this document. Version numbers change as new information is added to this document. Here is a sample version number:

80fr_ref_06-2008_v8.0.001.00

You will need this number when you are talking with Genesys Technical Support about this product.

Screen Captures Used in This Document

Screen captures from the product graphical user interface (GUI), as used in this document, may sometimes contain minor spelling, capitalization, or grammatical errors. The text accompanying and explaining the screen captures corrects such errors *except* when such a correction would prevent you from installing, configuring, or successfully using the product. For example, if the name of an option contains a usage error, the name would be presented exactly as it appears in the product GUI; the error would not be corrected in any accompanying text.

Type Styles

Table 3 describes and illustrates the type conventions that are used in this document.

Table 3: Type Styles

Type Style	Used For	Examples
Italic	• Document titles • Emphasis • Definitions of (or first references to) unfamiliar terms • Mathematical variables Also used to indicate placeholder text within code samples or commands, in the special case where angle brackets are a required part of the syntax (see the note about angle brackets on page 39).	Please consult the *Genesys Migration Guide* for more information. Do *not* use this value for this option. A *customary and usual* practice is one that is widely accepted and used within a particular industry or profession. The formula, $x + 1 = 7$ where x stands for . . .

Table 3: Type Styles (Continued)

Type Style	Used For	Examples
Monospace font (Looks like `teletype` or `typewriter text`)	All programming identifiers and GUI elements. This convention includes: • The *names* of directories, files, folders, configuration objects, paths, scripts, dialog boxes, options, fields, text and list boxes, operational modes, all buttons (including radio buttons), check boxes, commands, tabs, CTI events, and error messages. • The values of options. • Logical arguments and command syntax. • Code samples. Also used for any text that users must manually enter during a configuration or installation procedure, or on a command line.	Select the `Show variables on screen` check box. In the `Operand` text box, enter your formula. Click `OK` to exit the `Properties` dialog box. T-Server distributes the error messages in `EventError` events. If you select `true` for the `inbound-bsns-calls` option, all established inbound calls on a local agent are considered business calls. Enter `exit` on the command line.
Square brackets ([ ])	A particular parameter or value that is optional within a logical argument, a command, or some programming syntax. That is, the presence of the parameter or value is not required to resolve the argument, command, or block of code. The user decides whether to include this optional information.	`smcp_server -host [/flags]`
Angle brackets (< >)	A placeholder for a value that the user must specify. This might be a DN or a port number specific to your enterprise. **Note:** In some cases, angle brackets are required characters in code syntax (for example, in XML schemas). In these cases, italic text is used for placeholder values.	`smcp_server -host <confighost>`

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