Performance Management Advisors 8.0

Contact Center Advisor

User's Guide

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List of Procedures

Preface

Welcome to the *Performance Management Advisors 8.0 Contact Center Advisor User's Guide.* This document describes how to use the Contact Center Advisor user-level features of the Genesys Performance Management Advisors 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 45.

About Contact Center Advisor

Contact Center Advisor (CCAdv) provides your company the capability to view and analyze contact centers and workforce management operations with real-time information from a central point of reference. Information technology and business operations personnel can proactively manage both business and technical aspects of the contact center operations and take action to correct problems before they affect the business operation.

Contact Center Advisor provides a real-time display of contact center activity for contact centers throughout the enterprise. Predefined alerting conditions on applications and call types are established to display alerts on the Dashboard, as well as notify designated contacts.

Intended Audience

This document is primarily intended for end users of the Contact Center Advisor module. It has been written with the assumption that you have a basic understanding of:

- Computer-telephony integration (CTI) concepts, processes, terminology, and applications
- Network design and operation
- Your own network configurations

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Chapter

1 Using Dashboard Contact Data

This chapter describes how to use the Dashboard contact data. It contains the following sections:

Viewing Contact Data

This section describes how to view Dashboard data.

Contact Centers Pane

Each grouping presents different values because of the way in which the rollups are calculated.

- Selecting the organizational hierarchy (the *grouping* of information):
  - By geographic region then by contact center then by application group
  - By geographic region then by application group then by contact center
  - By operating unit then by contact center then by application group
  - By operating unit then by application group then by contact center
  - By reporting region then by contact center then by application group
  - By reporting region then by application group then by contact center
- Selecting the period of time for the accumulation of data in the `Contact Centers` pane and `Applications` pane: point-in-time metrics display for any selected time period. The calculation use values that pertain to the chosen

period. The calculations use the most recent values possible from the external source systems, usually refreshed approximately every 20 seconds.

- `Now`—The calculations use both values that describe the most recent five minutes, and values that pertain to one instant in time.
- `30 Min`—The calculations use values that describe the interval that started at the most recent even half hour, for example, 09:00 or 10:30. The calculations also use values that pertain to one instant in time.
- `Today`—The calculations use both values that describe the period that started at midnight, and values that pertain to one instant in time.

• If the rollups indicate that the applications should be included in the rollup:
  - The metric values at the highest level of the grouping summarize the second level.
  - The metric values at the second level of the grouping summarize the grouping at the lowest level.
  - The metric values at the lowest level of the grouping summarize the application group values.
• Summaries for metric values are either:
  - *Counts*—Counts are summed, for example, the number of calls offered, number of calls abandoned, and calls in queue.
  - *Values*—Values take the minimum or maximum that is appropriate for that metric, for example, the longest time in queue.
  - *Calculated values*—Calculated values are calculated at the aggregate by first summing the components of the calculation, then performing the calculation. Examples of calculated value metrics are: service-level percentage, abandoned percentage, and average handle time.
• Expanding the regions in the `Contact Centers` pane: Select the arrow icons. The selected row remains highlighted until you select another row that changes the information in the `Applications` pane.
• Displaying the applications in an application contact center or call types in a call-type contact center in the `Applications` pane: Select the information icon ( ) beside a contact center (or click to select the whole line). Selecting a skill group contact center displays the applications associated with the skill groups associated with the skill group contact center. If the contact center is at level 3 in a grouping then the applications are filtered by the application group at level 2.
• Displaying the applications or call types associated with an application group in the `Applications` pane: Select the information icon ( ) beside an application group. The applications are filtered by the contact center at level 2 in the grouping.

- Displaying the skill groups in a contact center in the `Skill Groups` pane: In the `Contact Centers` pane, select the information icon ( ) beside a contact center at the second level (or click to select the whole line). If the contact center is at level 3 in a grouping then the applications are filtered by the application group at level 2.
- Displaying the skill groups in a *contact center* and *application group*: in the `Skill Groups` pane, select the information icon ( ) beside a contact center at level 3, or application group at level 3 (or click to select the whole line).
- Widening and shortening a metric column: Right click on a vertical line between metrics and drag.
- Displaying a metric description in a ToolTip: Place the mouse pointer over a metric column header.
- Changing the size of the panes to focus on information in a particular pane (to the exclusion of other areas of the Dashboard): drag the splitter ( ) located in the center of the four panes in any direction. The vertical splitter increases and decreases the size between the contact centers and `Applications` panes on the left and the `Alert Map` and `Skill Groups` panes on the right. The horizontal splitter increases and decreases the size between the `Contact Centers` and `Alert Map` panes on the top and the `Applications` and `Skill Groups` panes on the bottom. The relative sizes are saved when you log out and back in.
- The open and close times of contact centers represent the official time for active data analysis. During non-operational hours, summaries that draw data from the contact centers (such as regional or application summaries) are calculated without that information. During closed hours, the contact center displays gray in the `Contact Centers` pane in the Dashboard. It is also hidden from the map unless an active alert exists. Once the alert expires, the contact center is hidden; however, the expired alert continues to display in the `Alerts` pane.

Applications and Skill Groups Panes

- Highlighting the relationship between applications and skill groups.
  - In the lower-left pane, select an application.
  - In the lower-right pane, select a skill group.
- Displaying the technical name for an application or skill group: If provided, the descriptive name displays in the pane. To display the technical name, put your cursor over the descriptive name.
- Widening and shortening the width of the metric columns: Right-click on a vertical line between the metrics and drag left or right.
- Displaying a metric description in a ToolTip: Place the mouse pointer above a metric column header.

- Sorting a column in ascending or descending order: Click on the header of the respective column. The table can be sorted only by a single column.
- The Skill Groups pane always displays real-time values: Select the Now time period in the Contact Centers pane to compare the values accurately.
- If the graph is closed and re-opened, the display begins with the default fixed period of data.

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

Metric Graphing

With previous releases, you could not view the continuous progression of metrics over time, only data about the current state of the contact center. Therefore, you could not determine how your actions were affecting the peformance of your contact center, or monitor key metrics to determine what trends were occurring.

In release 8.0 a visual graph can now maintain a live feed connection to the real-time data.

Note: Metric graphing is only available for objects (application, contact center, application group) within the Contact Centers and Applications panes on the Dashboard, and then only for Now/5 Minute metrics. Therefore, if the administrator selects AHT as a metric that can be graphed, it is the 5-minute AHT metric that will appear on the dashboard in the list of metrics that have graphs prepared for them. This feature is not available for skill groups.

Dashboard Changes

Metric Graphing Button

A new button () has been added to the Applications and Contact Centers panes for metric graphing. To select and graph a metric for a given object, select the object and click on the button in the appropriate pane.

To view a graphed metric for an application, in the Applications pane select that application and then click on the graphing button The graphing button is enabled when you have selected a single row in that table by clicking in the row. The graphing button will be disabled even after selection if multiple rows are selected, or if it is not possible for the metric to have a value for the selected application. The graphing button will also be disabled if no metrics have been configured for graphing by the administrator.

Metric Selection

Once the button is clicked (see Figure 1) a list of metrics that can be graphed is displayed (this list reflects the choices made in the Administration module and the names shown in this list are the display names for those metrics):

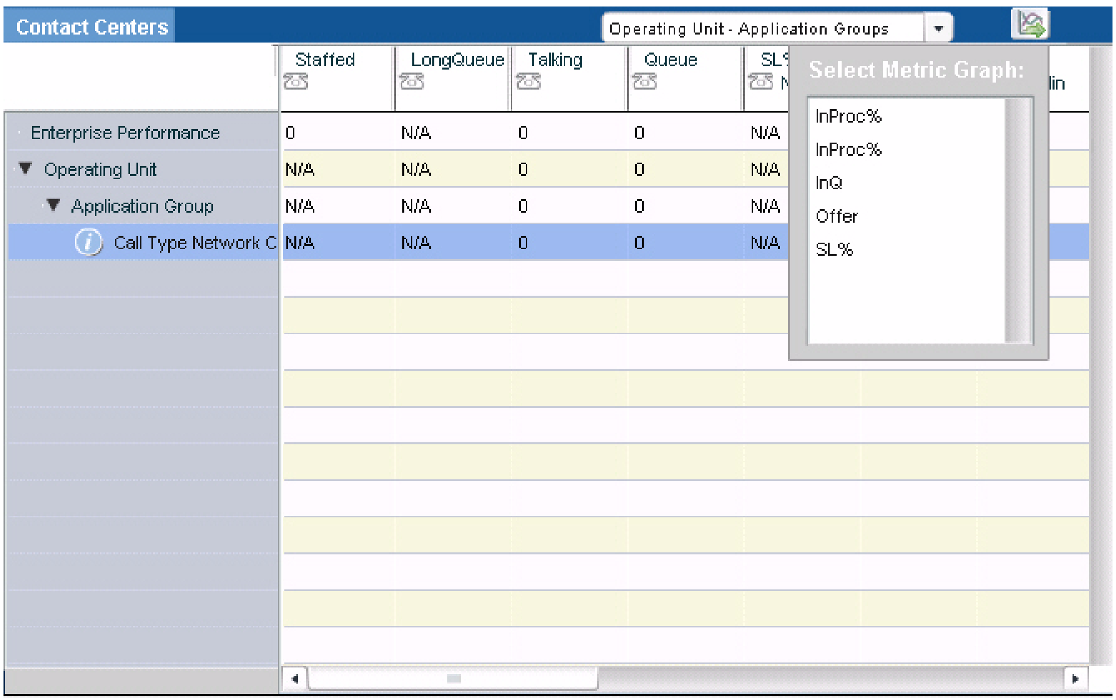

Figure 1: Metric Graphing—Select Metric

Metric Graphing Display

Select one of the metrics in the list to display a graph (see Figure 2 on page 16) showing the values of the metric for that object.

Figure 2: Metric Graphing Display

The graph’s title contains the metric’s current display name and the object name (or alias if available).The object can be an application, region, operating unit, application group or enterprise. object is an application. The context of the application displays in the graph title. This is the same as the `Application` pane’s title (either the contact center name or the contact center plus the application group’s name). The title also includes the last time the graph requested an update from the server.

ToolTips are displayed when an individual data point is selected on the graph. The ToolTip shows the following information:

- Metric name
- Metric value
- Time period

The type of graph displayed is based on the chart type selected for that metric by the administrator. The horizontal axis represents time, while the vertical axis represents the metric's value. New values appear as frequently as possible.

When launched, each graph displays values with timestamps from that day, and at most two hours in the past. The time period continues to grow while the graph is displayed. Missing or unavailable data for any part of the graph show as gaps in the graph.

If the graph is closed and re-opened, the display begins with the default fixed period of data (in this case, two hours).

Selcting a Portion of Data

The bar across the bottom represents the total set of data available, and you can select a portion of that total set to display in the main graph.

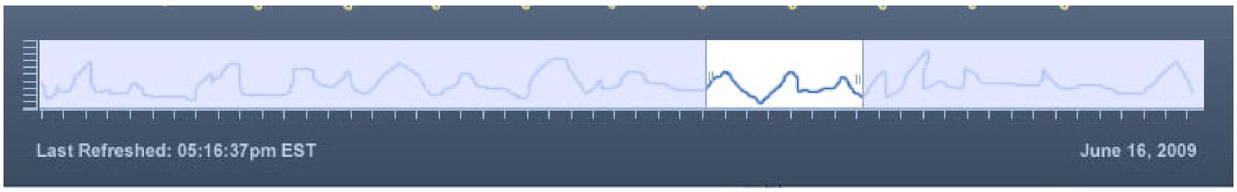

Figure 3: Selecting a Data Portion to Display

The selected set of data is highlighted in white. This selection can be expanded or contracted at any point of time. The metric's values display to the same precision used for display of that metric in the dashboard. Percentage values displayed as over `100` on the Dashboard are displayed on the graph as `100`.

Display Characteristics

If an application metric becomes undisplayable for any reason, a gap will appear in the graph; the gap will grow as it updates and, in two hours, will not show any values.

Viewing Alerts

To select one or both alert views (`Business` and `Technical`), select the corresponding button at the top of the `Map` pane. When you select a button, the status indicator changes color—gray for no alerts, red, and yellow. The highest priority sets the color.

Map Pane

The Map pane displays an international map with the location of all of the contact centers as small dots. The contact centers with alerts display as larger dots, red for priority 1 and yellow for priority 2. A contact center with multiple active business alerts is represented on the map with an orange square ( ) and a contact center with multiple active technical alerts is represented on the map with a star ( ).

Viewing the Map

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

Zooming

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

Blinking Alerts

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

There are three views:

- `Technical`
  A map showing active technical alerts with the details in a carousel. Technical alerts include offline peripheral gateways (Cisco ICM only) and technical manual alerts.
- `Business`
  A map showing active business alerts with the details in a carousel
- `View Alerts`
  Active and expired technical and business alerts in a panel

Alerts generated for a call type are associated with the call-type contact center, as well as with all skill-group contact center (via the skill groups). An alert for a call type displays on the map for a call-type contact center (if latitude and longitude is defined), as well as for the skill-group contact center that handles that particular call type

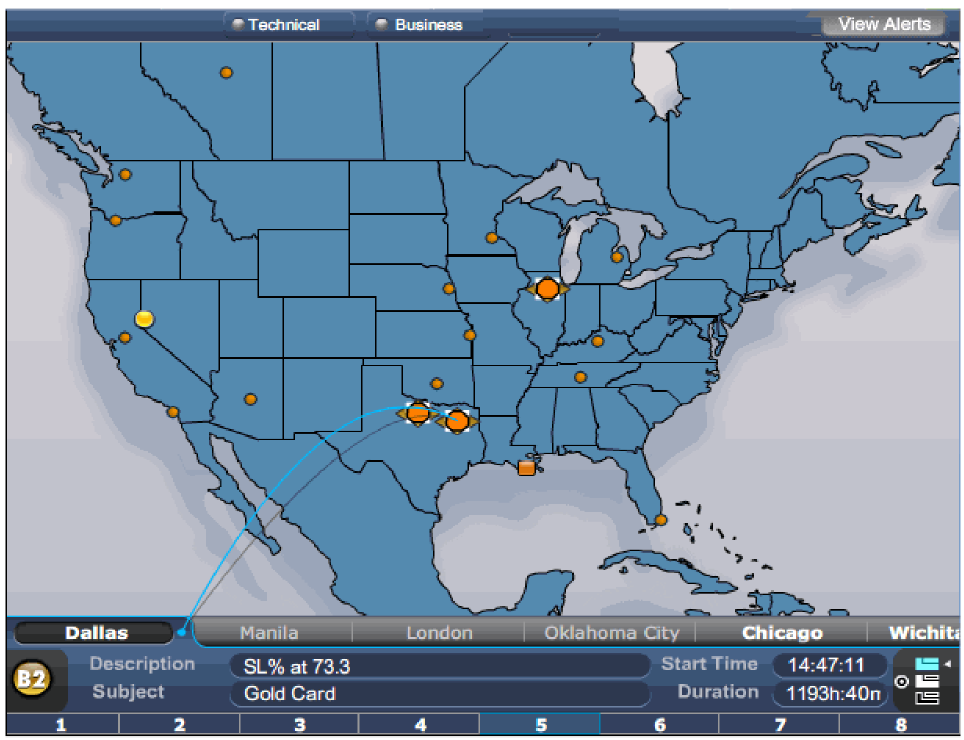

Figure 4: Map Pane

Summaries, such as regional or application summaries, are calculated with data drawn from the contact centers during user-defined operational hours only.

An alert notification is generated when an event occurs in which a target or threshold is reached. Based on the threshold trigger delay rate set on the System Configuration page, the alert must persist for a set amount of time (for example, 15 minutes) before it displays on the map. Peripheral gateway and manual alerts are an exception to the threshold trigger delay rate: peripheral gateway alerts display immediately.

An alert re-notification is sent if the priority level of an alert changes. An e-mail re-notification is not sent for an alert that continues to occur, metric value updates, or when the alert expires. The e-mail re-notification is based on the notification refresh rate set on the System Configuration page.

Display the contact center name by pointing at a contact center. Display the business and technical alerts on the current day in the carousel for a contact center by clicking a contact center with a larger dot.

An inactive contact center is hidden from the map unless an active alert exists. Once the alert expires, the contact center is hidden; however, the expired alert continues to display in the `Alerts` panel.

Technical and Business Views

In the carousel at the bottom of the alert map, the contact center names in white type have active alerts, the ones in gray do not. The tile of the alert currently in view is highlighted.

- Displaying the contact center name: Place your cursor over a contact center.
- Displaying alert details from the map for a contact center on the current day: Click the red or yellow dot representing the contact center. Then at the bottom of the map, click the tile that represents the alert. The carousel displays the violation description, subject, start time and duration of the alert.
- Automatically cycling through each alert of all contact centers: Click the Auto button  . The default setting is to scroll automatically.
- Automatically cycling through each alert of a single contact center, click the second button 
- Manually displaying each contact center with alerts: Click the `Manual` button and click a contact center in white text.

Alert Types The `Technical` and `Business` views display three types of alerts:

- Application metric threshold violation alerts
- Peripheral gateway offline alerts
- Manual alerts

Alert Details A carousel displays the alert details for individual contact centers. The contact center names display across the top of the carousel. The names in white type have alerts, the ones in grey do not. In automatic mode, the carousel scrolls past contact centers without alerts and moves to the next contact center with alerts. The carousel slows to allow you to read the alert description. Clicking a `Details` link in the `Description` field opens a Web page with more details. A line is drawn connecting the active `contact center` tab to the contact center. Each alert for the contact center is numbered in a tile at the bottom of the carousel. The number of the alert currently in view is highlighted. When you select an alert tile, the mode switches to manual. Display other alert types by selecting another alert type button. In semi-automatic mode, the alerts cycle for the selected contact center.

Manual Alert Display

The Dashboard map display for a manual alert is as follows:

- If both a skill-group contact center and a call-type contact center are selected for the manual alert, two alerts display on the map, that is, if the call type contact center has latitude and longitude coordinates.
- If both a skill-group contact center and a call-type contact center are selected for the manual alert, the call-type contact center alert and the skill-group contact center alert display in the `All Alerts` table.
- If only a skill-group contact center is selected for the manual alert, the skill group contact center alert displays in the `All Alerts` table.

Alerts Pane

The `Alerts` pane (Figure 5), which is available from the `Business` and `Technical` views lists all active alerts (business, technical and manual) within the enterprise hierarchy. This pane presents alerts that have `Critical` and `Warning` severity levels.

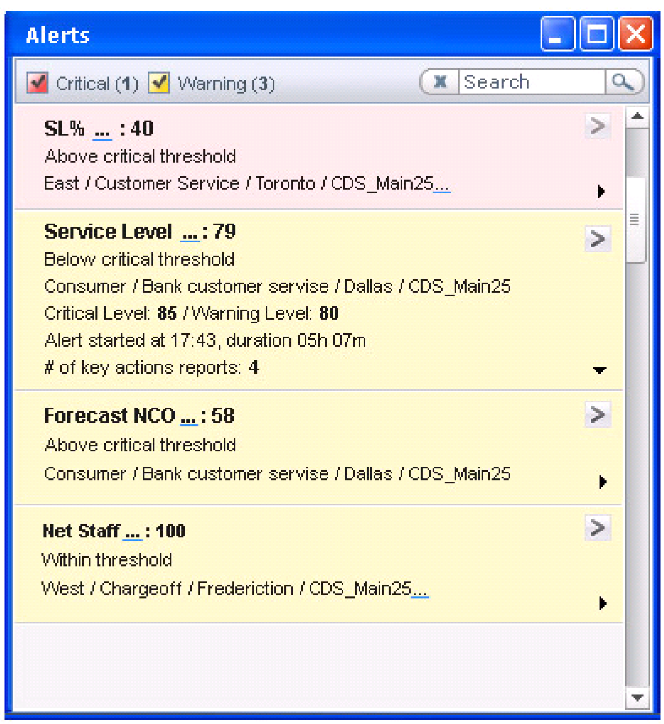

Figure 5: Alerts Pane

By default, the alerts are displayed by priority order—critical alerts are displayed first, then warning alerts. Within severity category, the alerts are sub-sorted by time with the most recent being displayed first. Critical alerts are shown with a red background and warning alerts are shown with a yellow background.

To open a Key Action Reports page for an alert, click the arrow icon in the upper right of the alert box. For more information, please see the *Performance Management Advisors 8.0 Alert Management User's Guide.*

Alert Contents

Each alert displays the information described in Table 1.

Table 1: Alerts Panel Parameters

	Business Alert	Technical Alert	Manual Alert
Name	The metric display name and its current value. On mouseover a brief description of the metric is displayed (this is the description configured in the `Metrics` page of the Administration module).	Displays `Peripheral Gateway Offline`.	The message configured for the alert. The message is configured in the `Alerts` page in the Administration module.
Status	The status relative to threshold, from the following list of values: • `Below critical threshold` • `Above critical threshold` • `Below warning threshold` • `Above warning threshold`	Displays `Critical`.	Displays `Critical` if the level of the alert (as configured in the Administration module) is `1`. If the level is `2`, the second line displays `Warning`.

Table 1: Alerts Panel Parameters (Continued)

	Business Alert	Technical Alert	Manual Alert
Context	The scope of the metric including items such as business line, application type, and location (that is, region, application group, call center). The display format is: `Regions/Application Groups/ Contact Centers/Application` On mouseover, the full scope name is shown in a ToolTip.	Displays the name of the contact center.	Displays the name of the contact centers associated with the alert. Because a manual alert can be associated with multiple contact centers, there are multiple entries in the `Alerts` panel for a given manual alert, with one entry for each contact center.

Threshold	The violation and warning thresholds.
	Thresholds with only an upper or lower limit will have the following structure:
	`Critical level: xx / Warning level: xx.`
	Thresholds with both an upper and lower limit will have the following structure.
	`Upper level: xx ·xx / Lower level: xx-xx.`
	Warning values are shown in boldface.
		Displays `Technical`.	Displays `Manual Business` or `Manual Technical` depending on the type of manual alert.

The panel also displays:

- The most recent alert along with its start time and duration. The format for this line is:

  `Most recent alert started at xx:xx, duration yy h:zz m.`

  The time of the alert is displayed in a 24 hour format, and *yy* and *zz* represent the number of hours and minutes respectively the alert has been active.
- The key action report name and responsible assignee’s last name and first name (if only one key action report exists) or the number of key action reports (if multiple key action reports exist).

Display Modes

The alert displays in either collapsed or expanded mode. By default, the alert displays in the collapsed mode, and can be expanded by clicking on arrow in the lower right corner of the alert box.

In collapsed mode, only the first three rows of alert information are displayed. In expanded mode, all six rows of alert information are displayed.

Launching Action Management Report

You can launch the Action Management Report page from any of the alerts in the panel by clicking on the arrow icon in the upper right of the alert box; the information from the alert displays in the `Alerts` section of the Action Management Report.

Filtering by Text

You can filter the `Alerts` pane by the text attributes (for example, metrics regions, application groups, contact centers, base objects). Only the alerts that match the search criterion display. Clearing the search parameters restores the complete list of alerts.

Filtering by Severity

You can filter the `Alerts` panel by severity. By default, both the `Critical` and `Warning` check boxes are checked when the alerts panel is launched, thereby showing all alerts of these types. By deselecting one of the check boxes, the alerts of that severity no longer display. Selecting the check box restores alerts of that severity to the panel. If you clear both check boxes, no alerts display. The number of alerts of each type is displayed in parenthesis next to the corresponding check box.

Resizing

The alerts panel is resizable. If the alerts panel is expanded vertically, more alerts are displayed in the window. If the alerts panel is expanded horizontally, more of the context in each alert is displayed in the window.

Column Chooser

The Column Chooser is used to select which columns display on the Dashboard. See Figure 6 on page 24.

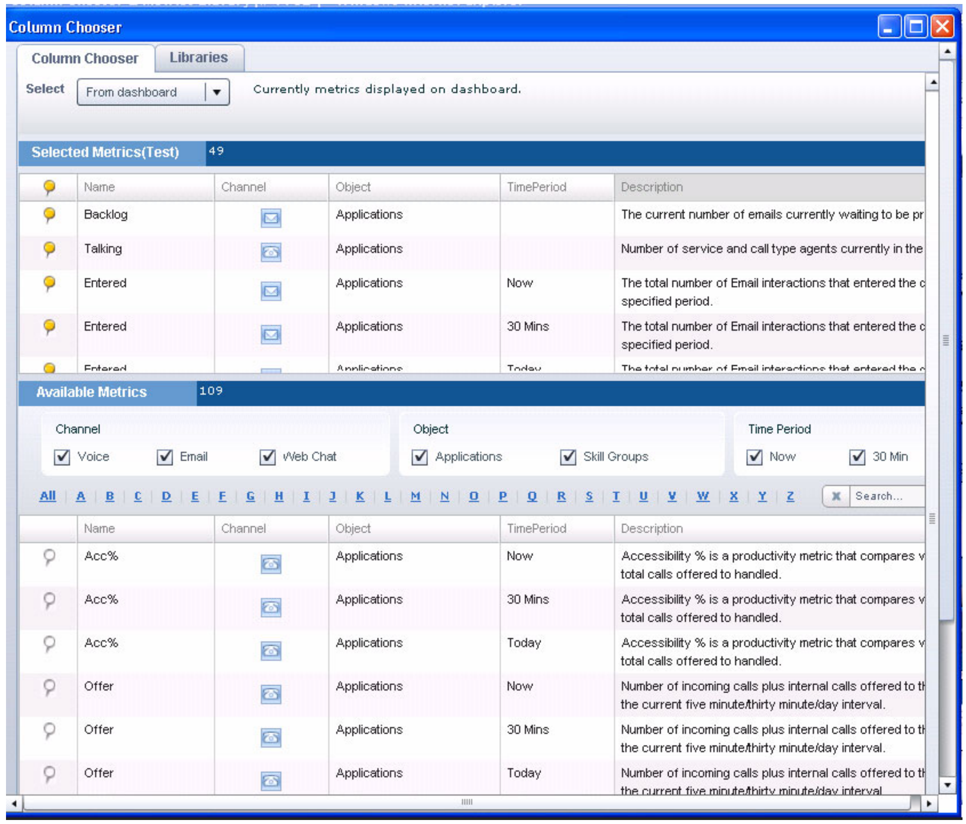

Figure 6: Column Chooser

Selecting Time Periods

Both the Column Chooser and Metrics Library show all metrics from all time periods together. Because the Dashboard in release 8.0 is no longer restricted to displaying metrics from just a single time period, the Column Chooser now allows you to select metrics from different time periods.

For example, the `Available Metrics` pane will show three entries for `AHT` for applications, one for each time period (`Now`, `30 Min` and `Today`). You can then choose to display one, two or all three on the Dashboard.

When the column chooser is launched for the first time, (that is, the set of displayed columns has never been previously configured in this session or in previous sessions), the list of metrics in the `Selected Metrics` pane corresponds to the default set of selected metrics configured in the Administration module (the same metrics shown by default on the Dashboard).

Default Metrics Sort Order

The default sort order of metrics is as follows:

- Primary sorting—Metrics are ordered by object type.
- Secondary sorting—Metrics are ordered alphabetically by name.
- Tertiary sorting—Metrics are ordered by time period (`Now` followed by `30 Mins` followed by `Today`).

Moving Metrics by Pinning/Unpinning

Metrics can be moved between the `Selected Metrics` and `Available Metrics` panes by pinning and unpinning them.

When a metric is selected in the `Available Metrics` pane by clicking on the pin in that row, the metric moves from the `Available Metrics` pane to the `Selected Metrics` pane.

When a metric is deselected (unpinned) in the `Selected Metrics` pane, it moves from there to the `Available Metrics` pane.

All the metrics in the `Selected Metrics` pane can be deselected by clicking on the pin in the header bar. In the `Available Metrics` list, clicking the pin in the header bar pins all of them to the `Selected Metrics` list.

Metrics Library

The Metrics Library allows you to:

- Create reusable lists of metrics to display on the Dashboard.
- Maintain those lists.

Figure 7 on page 25 shows the `Metric Library`.

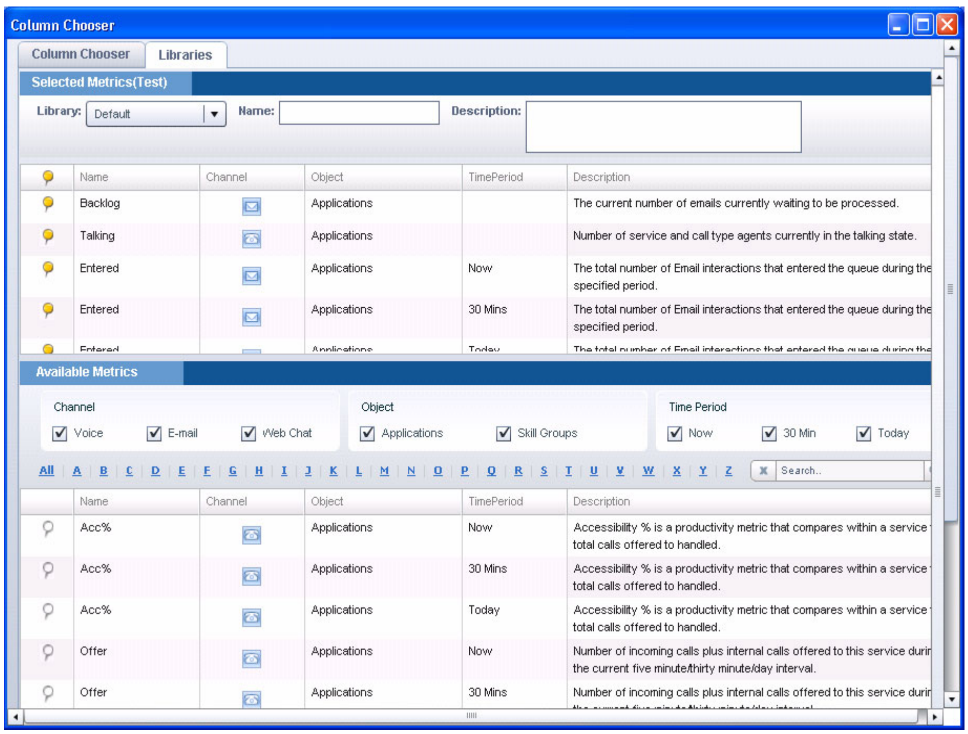

Figure 7: Metric Library

Metric Library

The library drop-down list contains a list of the libraries that you have created in addition to the default library. The default library is simply the default list of displayed metrics as configured in the `Administration` module. If no libraries have been created, there are only two entries in the library drop-down list:

- `From Dashboard`
- `Default`

As you create more libraries, they are added to the drop-down list. When you select a library, the description of that library is shown next to the drop-down list, and the `Seleted Metrics` pane is cleared and populated with the list of metrics that make up the library. Metrics that are not part of that list are shown in the `Available Metrics` pane.

In the `Available Metrics` pane, you can either add more metrics to the `Selected Metrics` pane by selecting them in the `Available Metrics` pane or remove metrics from the `Selected Metrics` pane. The library serves as a shortcut to select a list of metrics. However, if you select a different library from the drop-down list, all the metrics in the `Selected Metrics` pane will be replaced with the list of metrics that are part of the newly selected library.

To create a new library, select `Create New` from the `Library` drop-down list. The `Save As, Reset`, and `Delete` buttons are disabled at this point. You must then add a name for the library and optionally enter a description. You can then add metrics to the library, and save it by using the `Save` button. When the library is saved, the remaining buttons on the page are enabled.

General Usage Guidelines

This section lists and describes how to use more general Dashboard features.

- Logging in and out retains the time interval, metric sequence, column sorting, column widths, row expansions, the location of the splitter, the grouping, and the last-selected module tab.
- When the denominator is zero or the data is not available, the Dashboard displays `N/A`.
- If a metric's value cannot ever be supplied by the data source, a dash (-) is displayed in its place.
- When a contact center is closed or the values for a region or application group are all zeros, the row is dimmed. The ability to expand ( ) is disabled. Any item that is expanded and then turns suppressed is contracted. If an information icon ( ) had been selected and the bottom two grids populated, when the same item becomes suppressed the information in the bottom two grids remains as is until you select an unsuppressed row.
- A data connectivity indicator changes from green to red if a data source has not updated within a configured timeframe. Identified individuals will be notified by by e-mail when an alert is triggered. An administrator can go to the System Administration page to see which data source is causing the problem and take corrective action.
- The last update time indicates the time of the last data refresh.
- Stop the data from updating: Click the `Pause` button ( ). The button changes to and the update status indicator change to yellow. The data resumes updating if you select a new hierarchy grouping.

- Resume updating the data: Click the `Play` button (). The button changes to , the update status indicator changes to green, and the real-time updates resume.
- The update status indicator in the top-left corner changes to red () when the Dashboard cannot detect any data to display.
- Your administrator might have set up an Advisor tab with an external website. You need permission to use it. Depending on the website, when you switch to another Advisor tab and then return to the external website, you may have to log in to its home page again.

Chapter

2 Using Resource Management

This chapter describes how to use the Resource Management (RM) features of Contact Center Advisor. It contains the following sections:

Please refer to the *Performance Management Advisors 8.0 Resource Management User's Guide* for full information on how to use the Resource Management module.

Overview

The Resource Management (RM) module allows you to take actions to alter agent status and skills for a selected group of agents, as well as notify the affected parties of the actions by e-mail. The changes have an immediate impact on contact center operations.

Note: RM features described in this chapter work only for those contact centers, applications or skill groups whose data come from a Genesys source. There are no agent groups or agents in RM if it has a Cisco data source. However, skills and agent states from the Genesys system are still processed.

Selecting the Agents to Manage

You can open RM from Contact Center Advisor by selecting either:

- One agent/row from the `Contact Centers` pane
- One or more agents/rows from the `Applications` pane
- One or more agents/rows from the `Skill Groups` pane

You cannot select rows across panes (for example, you cannot select a row in the `Applications` pane and a row in the `Contact Centers` pane).

Selecting a Single Agent from the Contact Centers Pane

From the `Contact Centers` pane, select a single row and click the RM icon (). RM opens and the agents associated to the agent groups for the metrics in the `Totals` and `Averages` rows in the `Skill Groups` pane display.

For example, in Figure 8, if you select the Boston call center from the `Call Centers` pane, will display the agents that belong to the skill groups associated with the Credit Cards and Banking applications, in the Consumer application group:

- `New_CC_Accts`
- `Close_CC_Accts`
- `New_Bank_Accts`
- `Close_Bank_Accts`

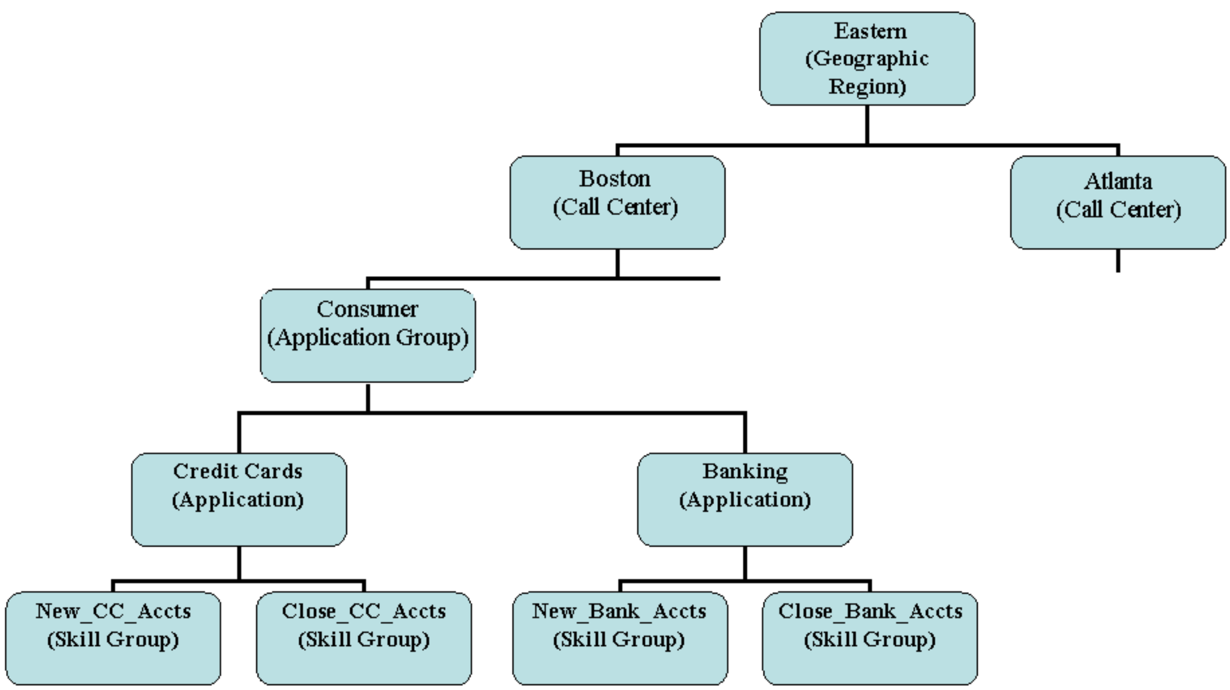

Figure 8: Enterprise Relationships

Selecting One or More Agents from the Applications Pane

From the `Applications` pane, select one or more rows and click the Resource Management icon (). The agents associated to the applications are displayed.

`Note:` As you select a row the skill groups associated to the application are highlighted in the `Skill Groups` pane. If multiple applications are selected, the skill groups highlighted in the `Skill Groups` pane are those associated with the application that was selected last.

For example, in Figure 8 on page 30, if you select Credit Cards from the `Applications` pane, RM displays the agents that are associated with the skill groups:

- `New_CC_Accts`
- `Close_CC_Accts`

Selecting One or More Agents from the Skill Groups Pane

From the `Skill Groups` pane, select one or more rows and click the `RM` icon (). You cannot select the `Totals and Averages` row.

`Note:` As you select a row the applications associated to the skill groups are highlighted in the `Applications` pane. If multiple skill groups are selected, the applications highlighted in the `Applications` pane are those associated with the skill group that was selected last.

For example, in Figure 8 on page 30, if you select the `New_CC_Accts` skill group, RM displays the agents that belong to that skill group.

Chapter

3 Action Management Reports

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

Action Management Report

The Action Management report is shown in Figure 9 on page 34.

Only one Action Management report can be opened at a time. From the Action Management report, 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 36.

Sections

The Action Management report includes four sections that expand and collapse:

- Alerts—The current values of the alert selected on the 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.

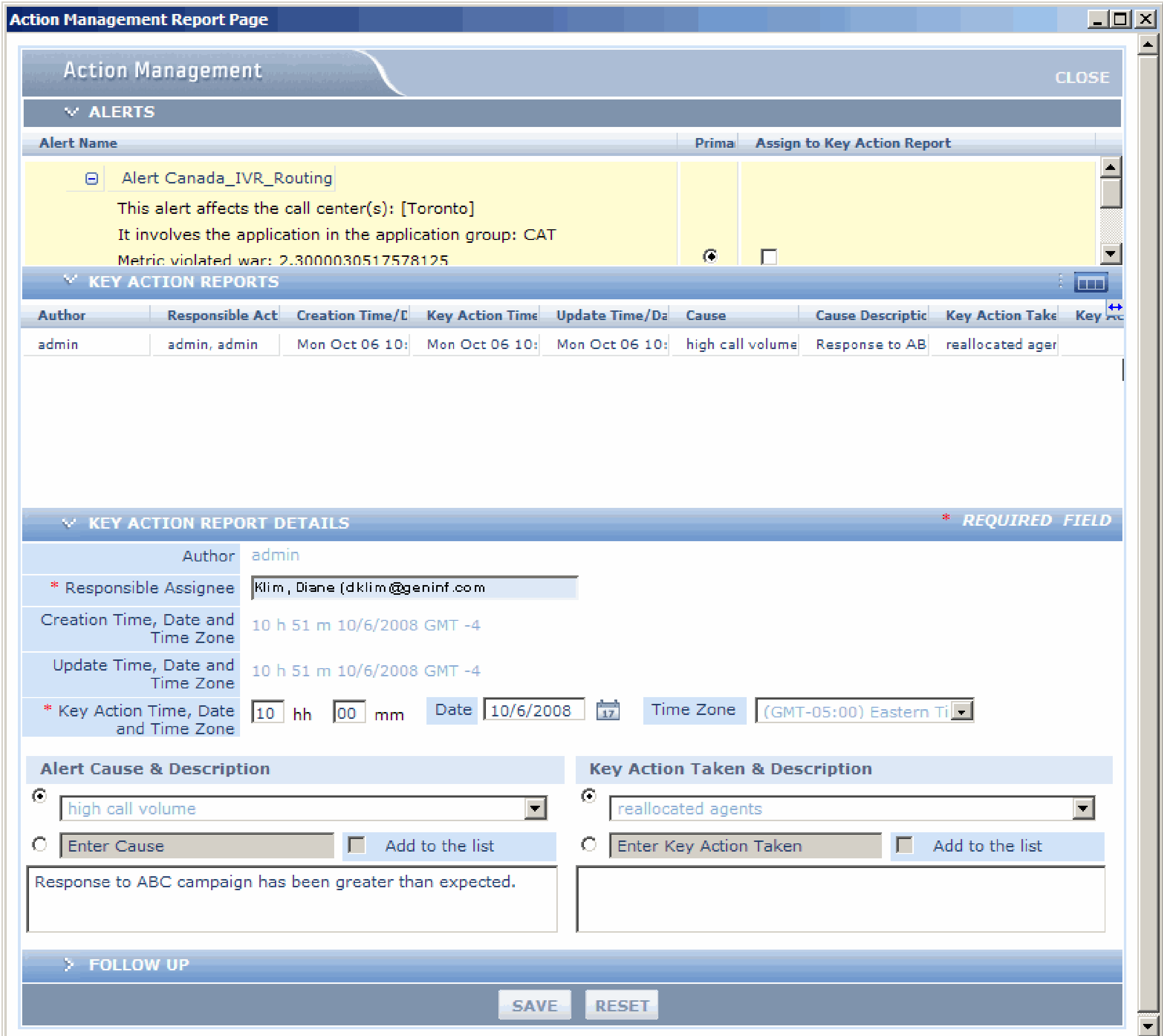

Figure 9: Action Management Report

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 never update.

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` window, 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 (See the *Performance Management Advisors 8.0 Alert*

Management User's Guide for further details). 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 application or 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

Chapter

4 Genesys Advisors Browser

This chapter describes how to use the Genesys Advisors Browser. It contains the following sections:

Installing/Uninstalling the Genesys Advisors Browser

This section describes how to install and uninstall the Genesys Advisors browser.

Installing the Genesys Advisors Browser

Procedure: Installing the Genesys Advisors Browser

Start of procedure

1. With Microsoft Internet Explorer, open `http://home.genesysadvisors.local`.
   The installation automatically begins.
2. If prompted, accept the installation of the ActiveX Control.
3. When prompted, click `Install`. The `Login` page is displayed.

4. Install, or download, or upgrade the Flash plug-in if required.

> Note: In release 8.0, the Flash plug-in is not installed automatically in the Advisors browser installation procedure. The minimum required version is 9.0.124. If the plug-in is not present, a prompt is displayed when the browser is first launched.

5. If there are errors during installation, open `Windows Task Manager|Processes` and end any XULRunner processes (for example, `xulrunner.exe`) that are running by selecting the process, then clicking `End Task`.

End of procedure

Uninstalling the Genesys Advisors Browser

Procedure: Uninstalling the Genesys Advisors Browser

Start of procedure

1. Log out of the browser.
2. Close the browser. You cannot uninstall the browser while it is open.
3. Go to `Control Panel` and select `Add or Remove Programs`.
4. Highlight `Genesys <version>` and click `Change/Remove`.
5. To accept, click `Yes`.
6. Go to `C:\Documents and Settings\[USERNAME]\Application Data\Genesys` and delete the `Enterprise Advisor` folder.
7. Go to `C:\Documents and Settings\[USERNAME]\Local Settings\Application Data\Genesys` and delete the `Enterprise Advisor` folder.

End of procedure

> Note: You can also use `C:\Program Files\Genesys\Advisor\uninstall.exe` to remove Genesys Advisors browser. This method deletes the folders mentioned in the steps in the procedure above.

Using the Genesys Advisors Browser

The Genesys Advisors 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.

Procedure: Logging in to the Genesys Advisors browser

Start of procedure

1. Double click on the Genesys Advisors browser icon. The `Login` page is displayed (Figure 10).
2. Type a user name and password.
3. The host name is `http://home.genesysadvisors.local` by default. However, if the `home.genesysadvisors.local`server is not found while the `Login` page loads, you must type your server name 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 logins.
4. To save the user name and password on your local machine, check the `Remember Me on this Computer` check box. If selected, the user name and password will pre-populate when you start the Genesys Advisors browser.
5. Click the `Log In` button. The Genesys Advisors 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.

End of procedure

Note: The Genesys Advisors browser also accepts login via proxy servers. You need to specify the IP address and port number during login.

Figure 10: Genesys Advisors Browser Login Page

Note: At the initial release of 8.0, the only language available in the `Language` field is English.

Navigation

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

Figure 11: Advisors Browser Tabs

Requesting a New Password

Procedure:
Requesting a new password

Start of procedure

1. On the Login page, click Forgot Your Password?
   A Forgot Password? page is displayed (Figure 12).

   Note: If your company uses LDAP, you must use your corporate tools to change your LDAP password.

2. Enter your user name and e-mail address.
3. Click Submit. A new password is sent to your e-mail address.

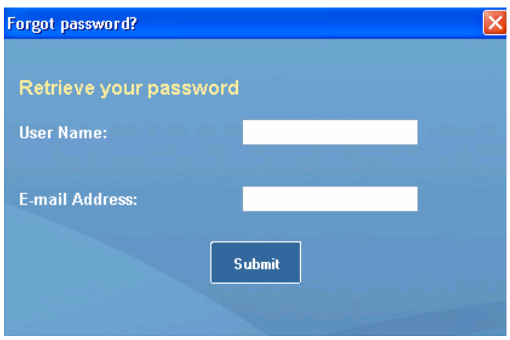

Figure 12: New Password Page

End of procedure

Changing a Password

Procedure:
Changing a password

Prerequisites

You must be logged in to change your password.

Start of procedure

1. Click the `Change Password` button. A `Change Password` page displays (Figure 13).

   Note: If your company uses LDAP, you must use your corporate tools to change your LDAP password.

2. Enter your old password, then your new password.
3. To confirm, re-enter your new password.
4. To save, click `Submit`.

End of procedure

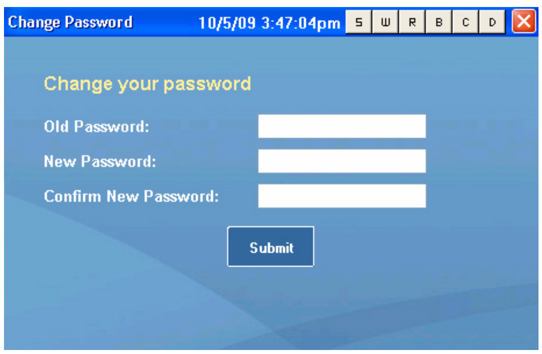

Figure 13: Change Password Page

Accessing Help

You can display this document in PDF form by clicking the `Help` button.

Logging Out

Log out of the Advisors Browser by clicking the `Log Out` button. This closes all instances of the application you are logged into.

Note: Using the browser `Close` button only closes the current instance of your application. Always log out before closing the browser.

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 49).	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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