GENESYS
AN ALCATEL-LUCENT COMPANY

Performance Management Advisors 8.0

Contact Center Advisor & Workforce Advisor

Administrator User's Guide

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Preface

Welcome to the *Performance Management Advisors 8.0 Contact Center Advisor & Workforce Advisor Administrator User's Guide*. This document describes how to use the system administrator features of the Contact Center Advisor and Workforce Advisor modules.

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 203.

About Contact Center Advisor and Workforce Advisor

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

Contact Center Advisor and Workforce Advisor provides a real-time display of contact center activity and workforce management for contact centers throughout the enterprise. Predefined alerting conditions on applications (services from Cisco ICM), call types (either call types or queues from Genesys Stat Server), and contact groups are established to display alerts on the dashboard, as well as notify designated contacts. In addition, Cisco ICM peripheral gateways are monitored and can activate an alert when they go offline.

Alert Management provides the ability to record the action taken to resolve one or more alert violations, as well as the results of that action. Each action is recorded in a separate key action report. The key action reports create a knowledge base that helps identify repetitive patterns and resolve future violations more rapidly.

With Resource Management you can change the skills, skill levels, status and call-routing behavior of agents, as well as notify the affected parties of the actions by e-mail. Changes are published to Genesys operational systems so that they have immediate impact on contact center operations. For more information, see the *Performance Management Advisors 8.0 Resource Management User's Guide*.

To access Resource Management, your user profile must have the `Resource Management` check box selected on the `Administration | Users` page. The `Resource Management` check box is available if either the `Contact Center Advisor` or `Workforce Advisor` check boxes are selected. When selected, the Resource Management icons display on Contact Center Advisor and Workforce Advisor.

Business Flow

The Contact Center Advisor and Workforce Advisor display real-time statistics and alerts based on data extracted from real-time data tables. In Genesys Advisors, *contact group* is synonymous with the terms *forecast group*, *staff group*, and *contact type*.

At a scheduled interval, the real-time data is extracted, summarized, and compared to pre-set thresholds. The summarized data, flagged for any instances of established thresholds being exceeded, is displayed on the Dashboard. An international map highlights locations of exceeded thresholds that have lasted longer than a configurable time. An alerts pane displays system- and user-generated text-based alerts.

Key actions taken, and their success in resolving the alerts, can be recorded, thereby contributing to a knowledge base that can help to identify repetitive patterns and resolve future violations more rapidly. In addition, users can change the skills and levels of agents in order to handle fluctuating call volumes, as well as log out agents who have forgotten to do so themselves.

The Genesys Performance Management Advisor also generates and distributes system- and user-generated text-based notifications to pre-defined contacts. These notifications are delivered via an SMTP message to e-mail addresses or pagers that have an e-mail address.

The Genesys Performance Management Advisor maintains application, call type, contact group and skill-group hierarchical data, parameter thresholds, and user-profile data within the Advisor database. Real-time and daily statistics are also retained within the database.

Intended Audience

This document is primarily intended for system administration-level users of the Contact Center Advisor and Workforce Advisor modules. This document focuses on using the features and functions of the System Administration module. In particular, it is a reference for system administrators responsible for configuring Contact Center Advisor and Workforce Advisor, including configuring applications, call types, and contact groups, for managing users and for managing contacts.

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.

The System Administration module is also used to define:

- User access to all Advisor modules.
- Alert Management key actions and alert causes.
- Genesys Adapters for use with Advisor modules.
- Resource Management notification templates and notification lists.

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Before contacting technical support, refer to the *Genesys Technical Support Guide* for complete contact information and procedures.		

Chapter

1 Dashboard Overview

This chapter gives an overview of the Contact Center Advisor (CCAdv) and Workforce Advisor (WA) Dashboards. It contains the following sections:

Contact Center Advisor

The Dashboard (Figure 1 on page 14) enables your company to analyze and view contact center operations using real-time statistics and alerts from a central point of reference. There are four panes:

- Contact centers
- Applications
- Skill groups
- Alerts

The `Alerts` pane displays alert activity on a map, in a pop-up window, and in a carousel. Only the contact centers and application groups to which a user is assigned display on the Dashboard.

If any metric cannot be configured by the data source, a dash (-) is displayed in its place.

A data connectivity indicator displays an alert if a data source has not updated within a configured timeframe. An administrator who has been alerted by the visual indicator on the dashboard that a data source is down can go to the `Administration` page to see which data source is causing the problem and take corrective action.

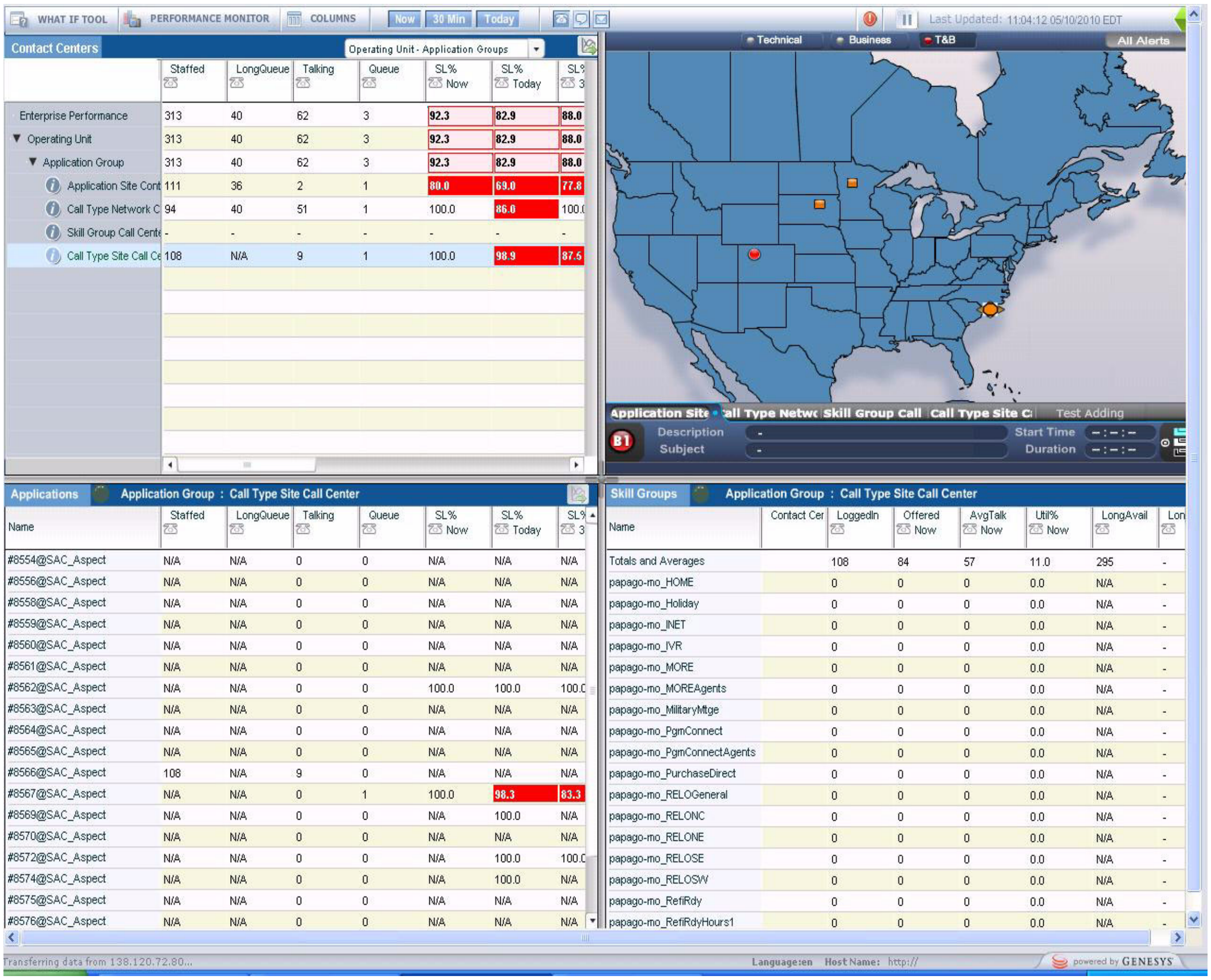

Figure 1: Contact Center Advisor Dashboard

Workforce Advisor

The Dashboard (Figure 2 on page 15) enables your company to view and analyze workforce management information using real-time statistics and alerts from a central point of reference. There are four panes:

- Contact centers
- Contact groups
- Skill groups
- Alerts

The `Alerts` pane displays alert activity on a map, in a pop-up window, and in a carousel. Only the contact centers and application groups to which a user is assigned display on the Dashboard.

If any metric cannot be configured by the data source, a dash (-) is displayed in its place.

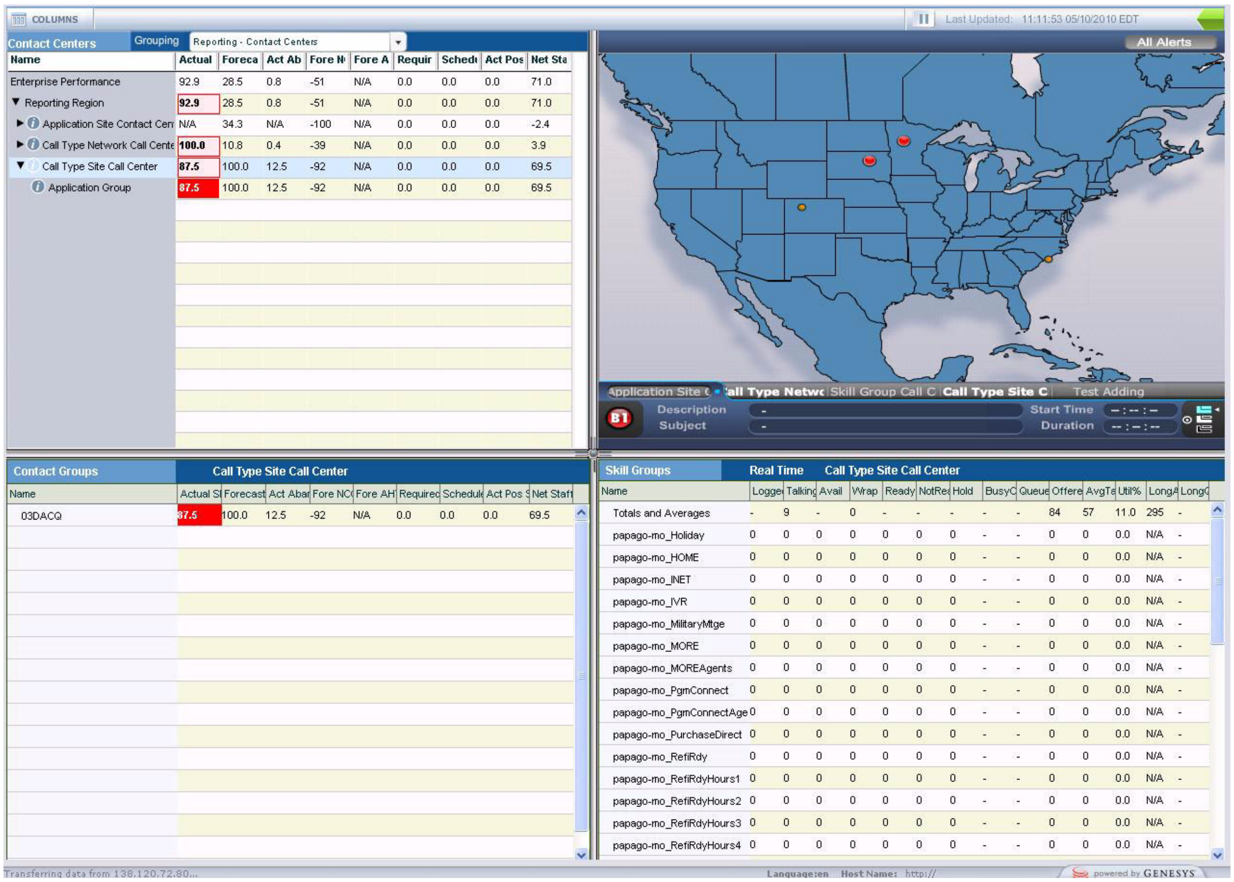

Figure 2: Workforce Advisor Dashboard

CCAdv Contact Centers Pane

For CCAdv, the `Contact Centers` pane in the top-left pane on the dashboard displays a table of the metric values based on the selected periods for contact centers, application groups, and a selected region. You can select which metrics display in the `Contact Centers` and `Applications` panes. You choose how the information is summarized and displayed by selecting from the following options:

- `Application Groups` or `Contact Centers`
  Application groups provide meaningful rollups of contact center activity in the summary displays.

- `Regions`
  A region represents a subdivision of the business operations of your company, for example, reporting regions, geographic regions, or operating units:
  - Reporting grouping—Details the applications (grouped by region) that are functioning within a regional contact center group and how they are performing against the target criteria.
  - Geographic grouping—Details the contact centers (grouped by region) and how the applications within that contact center, as an aggregate, are doing against the target criteria.
  - Operating Unit grouping—Displays the operating units (for example, blue, west, and orange contact centers) of a company.
- `Period`
  The time periods for the accumulation of data; for example, `Now`, `30 Minutes`, or `Today`. It also includes a rolling sum of the summary information about what has happened during the last five minutes, since the last half-hour historical data, and since midnight.
  - `Now`
    Reports on the most recent five minutes, and on point-in-time metrics that do not describe a period.
  - `30 Min`
    Reports on the period since the most recent even half hour and on the point-in-time metrics. The calculations use both values that describe the period 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`
    Reports on the period since midnight, and on the point-in-time metrics. The calculations use both values that describe the period that started at midnight. The calculations also use values that pertain to one instant in time.

CCAdv distinguishes between the following data sources for contact centers:

- `Application`
  The data source is from a TDM ACD contact center.
- `Call Type`
  The data source is from a virtual VoIP contact center.
- `Skill Group`
  Because a call-type contact center can be a collection of VoIP contact centers, a skill-group contact center represents a subdivision of a call-type

contact center and represents a collection of people and not a collection of calls. The data source of a skill-group contact center is a subdivision of the skill groups of a call-type contact center.

Notes:
1. When no data exists, a hyphen (-) displays, such as in the `Contact Centers` pane for a skill-group contact center that cannot parse skill group values for call types.
2. 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 violations for a metric in the `Applications` pane are yellow then the 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 color for the metric for that contact center in the contact centers pane is red. Although a red violation in that contact centers pane may look misleading when the value is in the yellow range of the threshold rule, the goal of the color is to call attention to the alert for the application.
3. When a user selects a triangle (▶), , the list expands. The selected row remains highlighted until you select another row that changes the data in the `Applications` pane.

Selecting the information icon next to the different types of objects displayed in the `Contact Centers` pane produces different effects. For the `Reporting–contact centers` grouping, selecting the information icon next to:

- An application contact center (the second level), skill groups within the contact center display in the `Applications` pane and `Skill Groups` pane, respectively. Associated skill-group contact centers display below the application contact center. When a user selects an information icon beside the application group (the third level), the applications and skill groups within the selected application groups and the contact center at the second level display in the `Applications` pane and `Skill Groups` pane. Selecting an application group at the second level does not filter/display the applications and skill groups within the application group in the `Applications` pane and `Skill Groups` pane. In the `Skill Groups` pane, the user can select the `Contact Centers` column to display the name of the skill group contact center associated to the skill group.
- A call-type contact center (the second level), and the call types and skill groups within the contact center display in the `Applications` pane and `Skill Groups` pane, respectively. Associated skill-group contact centers display below the call type-network contact center. When a user selects an information icon next to the application group (the third level), the call types and skill groups within the selected application group display in the `Applications` pane and `Skill Groups` pane respectively. In the `Skill Groups` pane, the administrator can choose to select the `Contact Centers` column to display the name of the skill-group contact center associated to the skill group.

- A skill-group contact center (the second level), the information icon changes color and the applications, call types and skill groups within the contact center display in the `Applications` pane and `Skill Groups` pane respectively. When a user selects an information icon next the application group (the third level), the skill groups within the selected application group and the contact center at the second level display in the `Applications` pane and the `Skill Groups` pane.

There is an exception: if a contact center is closed or the relevant metric's values for a region or application group are all zeros, the row displays with a gray background color, and expanding and displaying information in the `Applications` pane and `Skill Groups` pane is not available.

WA Contact Centers Pane

For WA, the top-left pane on the Dashboard displays a table of the metric values for contact centers, application groups, and a selected region. The time period for the accumulation of data is 30 minutes. The values are calculated on the cumulative average or sum for a period that begins at the most recent even half hour; for example, 09:00 or 09:30. You can select which metrics display in the `Contact Centers` and `Contact Groups` panes. You choose how the information is summarized and displayed by selecting from the following options:

- By application group
  Application groups provide meaningful rollups of contact center activity in the summary displays.
- By region
  A region represents a subdivision of the business operations of your company, such as reporting regions, geographic regions or operating units:
  - Reporting grouping details the applications (grouped by region) that are functioning within a regional contact center group and how they are performing against the target criteria.
  - Geographic grouping details the contact centers (grouped by region) and how the applications within that contact center, as an aggregate, are performing against the target criteria.
  - Operating Unit grouping displays the operating units (for example, blue, west, and orange contact centers) of a company.
- By network contact centers
  Four groupings provide a view of the network contact centers (CCs) and their associated skill-group contact centers. In other words, the network-site relationships of network contact centers and their associated site contact centers are displayed:

- `Reporting Regions - Network CCs`
  This grouping details the contact groups (grouped by reporting regions) functioning within a regional call-type–site contact center and call-type–network contact centers, and their associated skill group contact centers.
- `Geographic Regions - Network CCs`
  This grouping details the contact groups (grouped by geographic regions) functioning within a regional call-type–site contact centers and call-type–network contact centers, and their associated skill-group contact centers.
- `Operating Units - Network CCs`
  This grouping details the contact groups (grouped by operating units) functioning within a regional call-type–site contact centers and call-type–network contact centers, and their associated skill-group contact centers.
- `Application Groups - Network CCs`
  This grouping details the contact groups (grouped by application groups) functioning within a regional call-type–site contact centers and call-type–network contact centers, and their associated skill-group contact centers.

WA distinguishes between the data sources for contact centers:

- `Application`
  The data source is from a TDM ACD contact center.
- `Call type`
  The data source is from a virtual VoIP contact center.
- `Skill group`
  Because a call-type contact center can be a collection of VoIP contact centers, a skill-group contact center represents a subdivision of a call-type. contact center and represents a collection of people and not a collection of calls. The data source of a skill-group contact center is a subdivision of the skill groups of a call-type contact center.

Notes: 1. When no data exists, a hyphen (-) displays, such as in the `Contact Centers` pane for a skill-group contact center that cannot parse skill group values for call types.

2. 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 violations for a metric in the `Applications` pane are yellow then the 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 color for the metric for that contact center in the contact centers pane is red. Although a red violation in that contact centers pane may look misleading when the value is in the yellow range of the threshold rule, the goal of the color is to call attention to the alert for the application.

3. When a user selects a triangle (▶), , the list expands. The selected row remains highlighted until you select another row that changes the data in the `Applications` pane.

Selecting the information icon next to the different types of objects displayed in the `Contact Centers` pane produces different effects. For the `Reporting–contact centers` grouping, selecting the information icon next to:

- An application contact center (the second level), skill groups within the contact center display in the `Applications` pane and `Skill Groups` pane, respectively. Associated skill-group contact centers display below the application contact center. When a user selects an information icon beside the application group or skill-group contact center (the third level), the applications and skill groups within the selected object at the third level and the contact center at the second level display in the `Applications` pane and `Skill Groups` pane. Selecting an application group at the second level does not filter/display the applications and skill groups within the application group in the `Applications` pane and `Skill Groups` pane. In the `Skill Groups` pane, the user can select the `Contact Centers` column to display the name of the skill group contact center associated to the skill group.
- A call-type contact center (the second level), and the call types and skill groups within the contact center display in the `Applications` pane and `Skill Groups` pane, respectively. Associated skill-group contact centers display below the call type-network contact center. When a user selects an information icon next to the application group (the third level), the call types and skill groups within the selected application group display in the `Applications` pane and `Skill Groups` pane respectively.

There is an exception: if a contact center is closed or the relevant metric's values for a region or application group are all zeros, the row does not appear in the `Contact Centers` pane.

Map Pane

An international map displays the location of all of the contact centers, which are represented as small dots. The contact centers that have alerts display as larger dots, red for critical and yellow for warning. 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 ( ). The `Alerts` pane can display three views:

- `Technical`
  With CCAdv only, a map shows 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 shows active business alerts with the details in a carousel
- `View Alerts`
  You can display business alerts, technical alerts, or both. You can also launch the `Alerts` pane.

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

Note: WA does not monitor peripheral gateway availability.

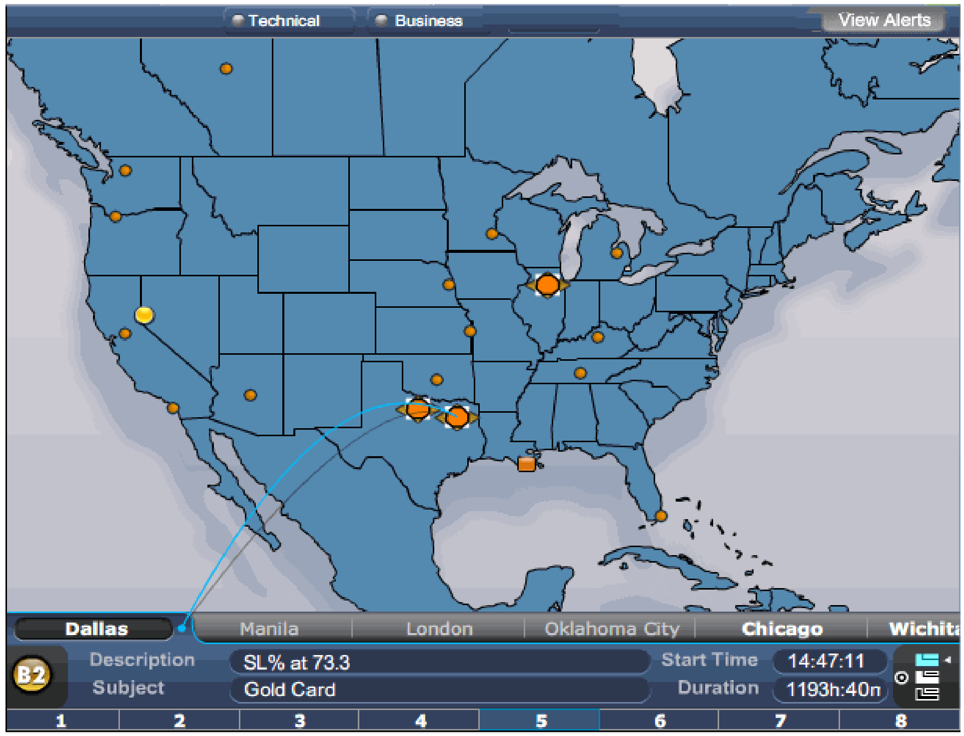

Figure 3: Map Pane

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 and lasts longer than the threshold trigger delay rate set on the System Configuration page. Peripheral gateway and manual alerts are an exception to the threshold trigger delay rate: they 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, for 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 for a contact center by clicking a contact center represented by 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.

Switch between the alert views (`Technical` and `Business`) by selecting the corresponding button at the top of the `Alerts` pane. The buttons have a status indicator that changes color: gray for no alerts, red, and yellow. The highest priority determines the color.

Technical and Business Views

The Technical and Business views display three types of alerts:

- Metric threshold violation alerts
- Peripheral gateway offline alerts (Contact Center Advisor only).
- Manual alerts

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 that have no alerts and moves to the next contact center that has alerts. The carousel slows to allow you to read the alert description. 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.

The dashboard map displays the following for a manual alert is:

- 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. In other words, 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 Alerts window.
- If only a skill-group contact center is selected for the manual alert, the skill-group contact center alert displays in the Alerts window.

Alerts Pane

The Alerts pane (Figure 4), which is available from the Map lists all active alerts within the enterprise hierarchy. The alerts in the Alerts pane are specific to either CCAdv or WA, depending on the module in use. This pane presents alerts that have Critical and Warning severity levels.

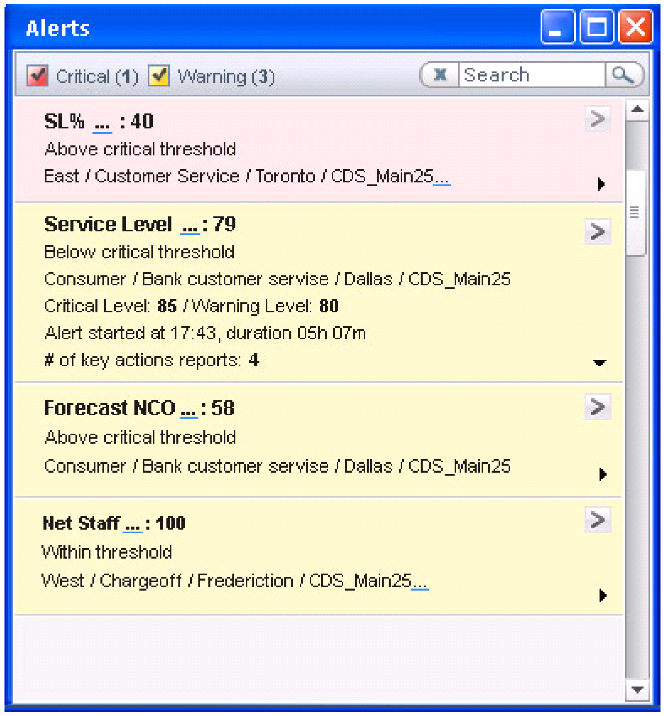

Figure 4: Alerts Pane

By default, the alerts are displayed by severity order—critical alerts are displayed first, then warning alerts. Within each 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.

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

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

Launching Action Management Report

The Action Management Report (AMR) page can 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.

Searching

The alerts panel has a search mechanism that allows users to filter results based on the text attributes of objects (such as metrics, regions, application groups, call centers, or base objects—names or aliases displayed on the UI). When the user executes a search, the alerts panel only displays the alerts that match the search criteria. Clearing the search parameters restores the complete list of alerts.

Filtering

The `Alerts` panel has a filter mechanism that allows the user to filter results based on one or more alert types (that is, `Critical` and/or `Warning`). By default, both the `Critical` and `Warning` checkboxes are checked when the alerts panel is launched, thereby showing all alerts of these types. If the user clears one of the checkboxes, the alerts of that type are no longer shown in the `Alerts` panel. Selecting the checkbox restores alerts of that type to the panel. If the user clears both checkboxes, no alerts are shown in the panel. The number of alerts of each type is displayed in parentheses next to the corresponding filter or checkbox.

Resizing

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

CCAdv—Applications Pane

The `Applications` pane displays a table of the metric values for applications for a selected contact center, or contact center and application group. The values for the metrics are based on the period. The metrics you select for the `Contact Centers` pane apply to the `Applications` pane as well. If provided, the descriptive name for the application displays in the pane. The technical name displays in a mouseover.

Selecting an application highlights the respective skill groups in the `Skill Groups` pane. Because the `Skill Groups` pane always displays real-time values, ensure that you select the `Now` time period in the `Contact Centers` pane in order to accurately compare the values.

Note: The information supporting the highlighting of applications and skill groups between applications and skill groups is retrieved once a day to the Dashboard. If a relationship changes in the System Administration module, and you do not want to wait overnight to obtain the up-to-date highlighting, then the administrator must restart the XMLGen service.

Columns can be sorted in ascending or descending order by clicking on the header of the respective column. The table can only be sorted by a single column.

WA—Contact Groups Pane

The `Contact Groups` pane displays a table of the metric values for contact groups for a selected contact center or application group. For network contact centers, the contact groups of the skill-group contact center associated to the network contact center display. The metrics you select for the `Contact Centers` pane apply to the `Contact Groups` pane as well. If provided, the descriptive name for the contact groups displays in the pane. The technical name displays in a mouseover.

Selecting an contact groups highlights the respective skill groups in the `Skill Groups` pane.

Note: The `Contact Groups` pane and `Contact Centers` pane displays half-hour values, whereas the `Skill Groups` pane displays real-time values.

Columns can be sorted in ascending or descending order by clicking on the header of the respective column. The table can be sorted only by a single column.

Skill Groups Pane

The Skill Groups pane displays a table of the metric values for the skill groups employed for a selected contact center, or a selected contact center and application group, that have been configured to display on the Dashboard. For skill-group contact centers, the skill groups of the contact groups of the network contact center associated to the skill-group contact center display. The metric values are calculated in real time. You can select which metrics (columns) to display in this pane. The administrator can choose to display the Contact Centers column which will display the name of the skill-group contact center associated to the network contact center.

In CCAdv, selecting a skill group highlights the respective applications or call types in the Applications pane. Also, because the Skill Groups pane always displays real-time values, ensure you select the time period Now in the Contact Centers pane in order to accurately compare the values.

In CCAdv and WA, the descriptive name, if provided, for the skill group displays in the pane. The technical name displays in a mouseover. Columns can be sorted in ascending or descending order by clicking on the header of the respective column. The table can be sorted only by a single column.

In WA, selecting a skill group highlights the respective contact groups in the Contact Groups pane.

Note: In WA, the Contact Groups pane and Contact Centers pane display half-hour values, whereas the Skill Groups pane displays real-time values.

For Cisco ICM, the Totals and Averages line summarizes the base skill groups only, not the sub-skill groups.

Performance Monitor Window

With the Performance Monitor window (Figure 5), you can choose what to monitor from the contact centers pane and see the values in three time periods (Now, 30 Min, and Today) in a summarized view. Point-in-time metrics do not have 30 Min and Today bars.

Note: In release 8.0, only voice metrics are available in the Performance Monitor.

The Performance Monitor window displays in a separate window outside of the Genesys Advisor. The metric values refresh continuously. If no row is selected in the contact centers pane, the updated Performance Monitor window uses the Enterprise row. The hierarchy and metrics remain until you choose to change the information.

A title bar indicates the path of the selected row in contact centers pane. An Alert indicator changes when there is at least one active alert. A Refresh Rate indicator indicates when the metric values will be refreshed.

Performance Monitor Screen

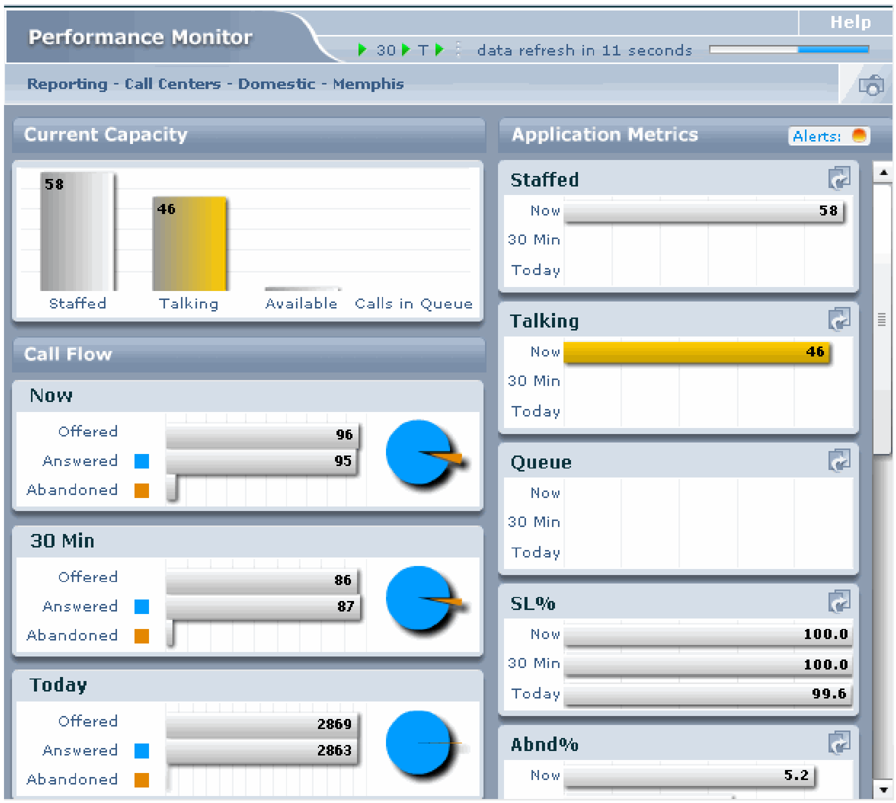

Figure 5: Performance Monitor

Sections

The Performance Monitor window has three sections:

Current Capacity

The Current Capacity area displays workforce metrics—staffed, talking, available, and calls in queue—from CCA. The values are from the Now period.

Call Flow

The Call Flow area graphically displays values for offered, answered and abandoned for Now, 30 minutes, and Today. A pie chart displays answered and abandoned.

Application Metrics

The Application Metrics area displays a box for each of the columns displayed in the contact centers pane. You can also display and monitor a single Application Metric box (Figure 6) on the desktop but a copy of the Application Metric box remains part of the Performance Monitor window.

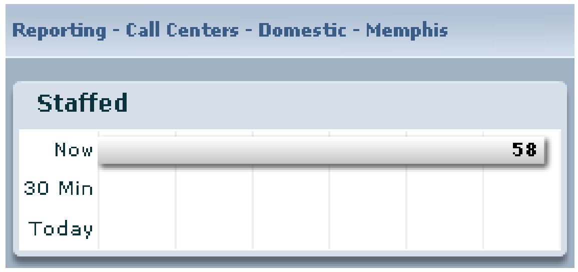

Figure 6: Spawned Application Metric

Snapshot Window

The `Snapshot` window (Figure 7) is the same as the `Performance Monitor` window except that the information is static which enables you to compare the values at a point in time with real-time values. The `Snapshot` window displays the time and date when it was created.

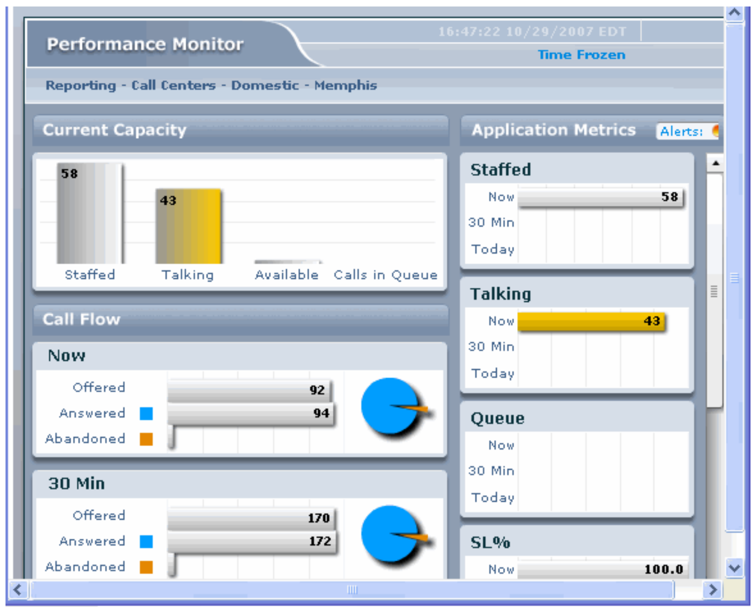

Figure 7: Snapshot Window

Workforce What-If Tool

You can use the Workforce What-If tool (Figure 8) to plan your company's telephone networks or calculate probability in your queuing system. You can calculate call volume, average handle time, the number of agents, average speed of answer or service level percentage by providing at least two values. You can determine information such as, the number of agents required for a particular service level, the effect fewer agents has on your service level, or the number of agents required from other queues in order to meet your service level.

The Workforce What-If tool displays in a separate window outside the Genesys Advisor.

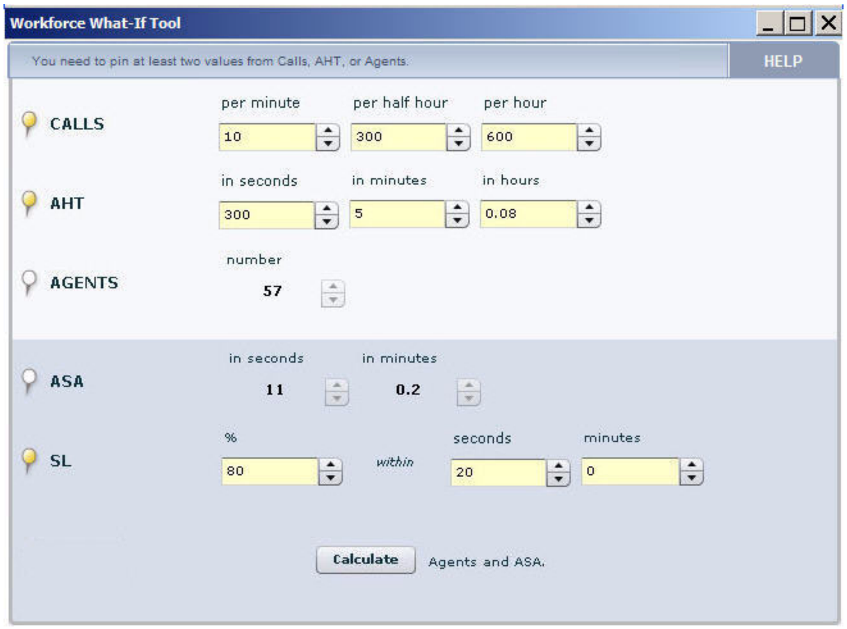

Figure 8: Workforce What-If Tool

Chapter

2 Administration Overview

This chapter describes how to add database records to the Advisors database. It contains the following sections:

System Administration

Getting Started

Before you configure the relationships, it is important to note that there are some dependencies that affect the sequence of the software maintenance.

Note: The relationships that support highlighting skill groups in CCAdv when applications are selected, and vice versa, takes effect once per day, overnight. For the configuration to take effect immediately, stop and restart XMLGen.

Configuring Organizational Hierarchies for the Dashboard

To display contact centers on the Dashboard, multiple procedures must be completed and rollups configured.

1. **Regions**:Add regions to represent the subdivisions of your company's business operations. Specify whether they are geographic, reporting or operating unit regions; see “Adding a new region” on page 38.
2. **Contact Centers**: Add a contact center for an application, call type, or skill group data source and select a geographic region; see “Adding a New Contact Center” on page 41.
3. **Peripheral Gateways**: (Cisco ICM *only)* A peripheral gateway is a communications interface between a call distributor and call router. Assign peripheral gateways to an application contact center to link the skill groups of the peripheral gateway to the contact center; see “Assigning a peripheral gateway to an application contact center” on page 45.
4. **Contact Groups**: (WA only) To create rollups for contact groups, first assign a contact center to the contact group; see “Assigning contact groups to a type and contact center” on page 48.
5. **Application Groups:** To provide a meaningful rollup of types of contact center activity in the summary displays, add application groups; see “Adding a new application group” on page 50.
6. **System Configuration**:
   - **Contact Center Advisor/Workforce Advisor:** To configure alert behavior, as well as the application-and-skill group relationship setting.
   - **Data Sources:** To set the update-delay threshold rule and notification distribution list.
   - **Modules:** To modify the application name that displays on the dashboard tabs.

   See “Updating the system configuration” on page 55.

7. **Genesys Adapter**: If the Genesys Adapter is installed, you can view and maintain the list of Genesys Adapters and their agent group, queue, and filter combinations.
   - **Manage Adapters:** If the Genesys Adapter is installed, you can view and maintain the list of Genesys Adapters and their agent group, queue, and filter combinations.See the Genesys Configuration page (Figure 51). To add and delete adapters, see "Managing Genesys Adapters" on page 106.
   - **Object Configuration:** If the Genesys Adapter is installed, you can view and maintain the list of agent group, queue, and filter combinations of a selected adapter. See "Configuring Genesys Objects" on page 108.
   - **SL Configuration:** If the Genesys Adapter is installed, you can view and maintain the service-level time thresholds for the queues of a selected adapter. See "Configuring Service-Level Thresholds Per Queue" on page 112.
8. **Rollups**: To configure the information displayed on the dashboard and control how it is toggled and rolled up, edit the rollup. Call type contact center rollups must be set up before skill group contact centers.
   - For CCA, see "Editing application rollups" on page 57. For each application in a contact center, select the application group, reporting region, and operating unit to which you want the application to belong. Call-type contact center rollups must be configured before skill-group contact centers.
   - For contact group rollups, see "Editing a contact group rollup (for Workforce Advisor)" on page 61. For each contact group in a contact center, select the application group, reporting region, and operating unit to which you want the contact group to belong then assign an application or call type.
9. **Skill Groups**: Map skill groups to a skill group contact center and its contact groups. Configure skill groups to display on the dashboard. To configure skill groups to display on the dashboard, on the Skill Groups page, select Yes for Display on Dashboard, see "Assigning skill groups to a skill group contact center and determining skill groups to display" on page 64.

Configuring Metric Defaults and Rules

10. **Metrics**: define the minimum and maximum thresholds for the pre-defined metrics.See "Updating a Metric" on page 68.
11. **Application and Contact Group thresholds**: Threshold rules define the critical (red) and warning (yellow) conditions that trigger alerts at the application group level. Specify the threshold values for each metric. To

define the critical and warning conditions that trigger violations at the application group level, specify the threshold values for each metric type, see “Adding or Updating Thresholds” on page 70.

Adding Manual Alerts

12. **Alerts**: dd manual alerts and specify the alert type and affected contact centers. See “Adding a manual alert” on page 82.

Adding Contacts, Users, and Distribution lists

13. **Contacts**:To capture the names and contact information for the individuals who can be notified when an alert is created or changed, add contacts. see “Adding a new contact” on page 87. Only contacts assigned to distribution lists are sent alerts by e-mail.
14. **Users**: Add users with the authority to view specific contact centers and application groups and have either access to only the dashboard or access to both the dashboard and system administration. See “Adding a user” on page 84. Once the user is added, assign the contact centers and application groups the user can see on the dashboard.
15. **Distribution Lists**: To group users who are sent alerts based on a specific alert type, add distribution lists and select the contacts, contact centers, and application groups you want to include in the distribution list. See “Adding a distribution list” on page 90. Only the contacts assigned to a distribution list are sent alert messages by e-mail.

Adding Key Actions and Causes for Alert Management

16. **Key Actions**: Add and approve key actions used in Action Management reports. See “Adding Key Actions and Causes for Alert Management” on page 36.
17. **Alert Causes**: Add and approve alert causes used in Action Management reports. “Adding a new contact” on page 87

Resource Management

18. **Notifications Templates**: If Resource Management is installed, provide standard content for e-mails describing the directives and actions taken from Resource Management. To view and maintain notification templates, see “Notification Templates” on page 99.
19. **Notifications List**: If Resource Management is installed, notifications lists are used to inform groups of users within an organization about changes being made to the agents or resources. To view and maintain notification lists, see “Notification Lists” on page 102.

General Notes

Asterisks (*) indicate required fields.

- The date format is `MM/DD/YYYY`.
- The time format is `HH:MM` using the 24-hour clock.
- The e-mail format is `firstname.lastname@company.com`.
- To search a list of items in a table, type the name of the item or the first few characters in the `Search Existing` field, then click `Search`. The items that match the beginning of the name display.
  To display the whole list again, click `View All`.

Notes: 1. The search functionality is not available on the `Alerts` pages.
2. Where paging is implemented, to navigate to the next or previous page in the returned list, click `next` or `prev`; to navigate to the first or last page in the returned list, click `first` or `last`.

Zero Suppression

In release 8.0, zero suppression has been enhanced. Zero suppression can be configured for an application, a skill group, a region, or an application group.

When certain combinations of parameter values are returned as zeroes (for example, calls offered/handled for exclusively Cisco environments, or e-mails offered/handled and Web interactions offered/handled for environments containing Genesys) the entire row for the relevant object is either displayed with a gray background (CCAdv) or not displayed at all (WA).

Regions

The **Regions** page (Figure 9) allows you to set up regional information. A region represents a subdivision of the business operations of your company within each of the following views:

- **Geographic** is based on the physical location of the contact center. The applications and contact groups within a contact center fall under only one geographic region.
- **Reporting** is management based. Applications and contact groups within a contact center may fall within multiple reporting regions.
- **Operating Unit** is based on the defined groupings of your company that are summarized and displayed on the Operating Unit view. Applications and contact groups within a contact center may fall within multiple reporting regions.

Procedure: Adding a new region

Start of procedure

1. Enter a name for the region.
2. Select the rollup radio button: geographic, reporting, or operating unit.
3. To indicate a region with no current call activity, select `Yes` for `Zero Suppress`. The region displays gray in the contact centers pane for Contact Center Advisor and is hidden for Workforce Advisor.
4. Click the `Add Region` button. A confirmation message displays and the region displays in the list.

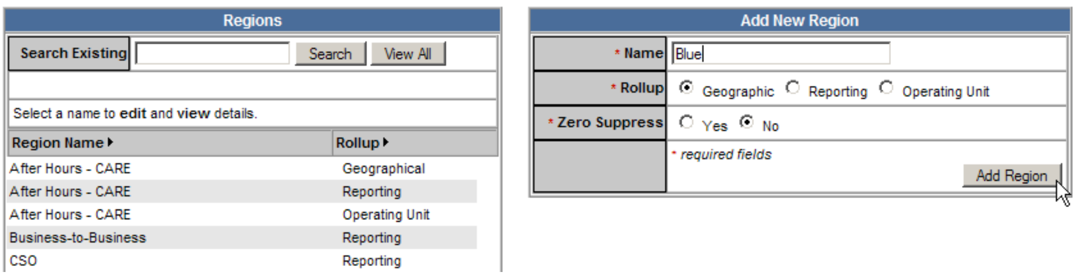

Figure 9: Regions page: Add

End of procedure

Procedure: Updating a region

Start of procedure

1. To display the details of a region:
   select from the list
   OR
   type the first few letters in the `Search Existing` field, click `Search`, and then select from the list.
2. Make edits.
3. To save the edits, click the `Save Edits` button.
   A message confirms the update.

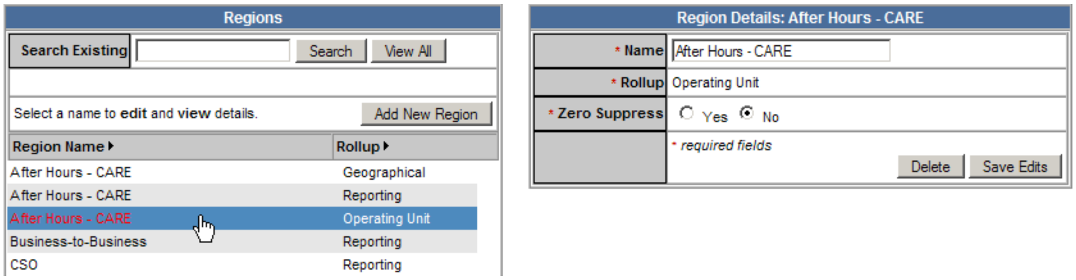

Figure 10: Regions Page: Edit/Delete

End of procedure

Procedure:
Deleting a region

Prerequisites

Before deleting a region, you must remove its assignment from contact centers and rollups.

Start of procedure

1. To display the details of a region:
   select from the list
   OR
   type the first few letters in the `Search Existing` field, click `Search`, and then select from the list.
2. Click the `Delete` button.
   A confirmation window displays.
3. To confirm the deletion, click `OK`.
   A message confirms the deletion.

End of procedure

Contact Centers

The Contact Centers page (Figure 11) allows you to add and update contact centers. Multiple steps are required for contact centers to display on the dashboard.

Contact centers use either application, call type, or skill-group data sources:

- **Application**: the data source is from a TDM ACD contact center
- **Call type**: the data source is from a virtual VoIP contact center

- **Skill group**: Because a call-type contact center can be a collection of VoIP contact centers, a skill-group contact center represents a subdivision of a call-type contact center and represents a collection of people and not a collection of calls. The data source of a skill-group contact center is a subdivision of the skill groups of a call-type contact center.

You can assign skill groups directly to a contact group; however, contact centers must be network types. The four possible types of contact centers are:

- Application
- Skill group
- Call type

For Cisco ICM, application-site contact centers are associated to peripheral gateways. Call types are not available for configuration within application contact centers.

Note: In this document, the word application is synonymous with call type unless a distinction is required. A call-type contact center without map coordinates may be considered to represent the “network” and therefore may be referred to as a *network contact center*.

For call-type contact centers, the `Application-to-Skill Group Relationships` field must be set to `Auto Override` or `Manual` on the System Configuration page.

There is a 20-40 second delay for call types to display for the call-type contact center, and the XMLGen service must be running to create the call types that can be rolled up to a newly created call-type contact center.

A call-type contact center does not require map coordinates (that is, latitude and longitude). However, it will not display on the map without them. If you add or remove the latitude and longitude later, you must log out of the dashboard and back in for this change to take effect.

Genesys recommends adding only one call-type network contact center. Because a skill-group contact center can only be assigned to one network contact center, if more than network contact center is created, you must add a second skill-group contact center for each physical location.

Once a contact center is saved, you cannot change the data source.

Contact centers must be assigned to distribution lists on the `Distribution Lists` page to receive e-mail notifications and assigned to users on the `Users` page for users to be able to see the contact centers on the dashboard. If you select the `Select All` check box when assigning contact centers, all existing contact centers/sites are assigned and any contact centers added in the future are assigned automatically. If not, you must assign the contact center manually.

Adding a New Contact Center

Procedure:
Adding a new contact center

Start of procedure

1. On the navigation bar, select `Contact Centers`.
   The `Contact Centers` page displays.
2. Enter the contact center name.
   The name of the contact center cannot include the slash (/) or colon (:) character.
3. Select the time zone from the drop-down list.

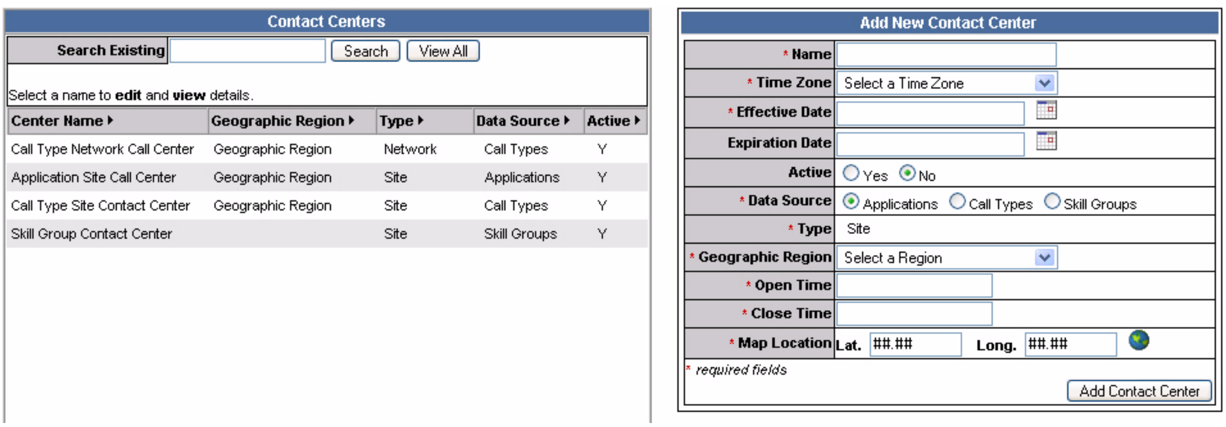

Figure 11: /Contact Centers Page: Add

4. To specify when a contact center displays and ceases to display, click the Calendar icons (Figure 12) and select the effective and expiration dates.
   The expiration date is optional.

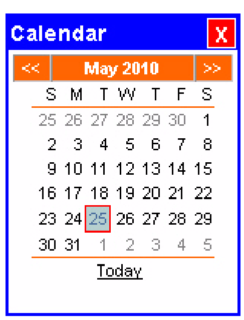

Figure 12: Calendar Icon

5. To activate the contact center, click `Yes`.
   Selecting `No` deactivates the contact center and prevents it from displaying on the Dashboard allowing you to set it up in advance. An inactive contact

center 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 `All Alerts` table.

6. To define a contact center using applications, select the `Applications Data Source` radio button.
   OR
   To define a contact center using call types, select the `Call Types Data Source` radio button.
   OR
   To define a contact center for skill groups, select the `Skill Groups Data Source` radio button.

Note: Once the contact center is saved, you cannot change the data source.

7. Select the `Network` or `Site` radio button.
   For skill-group contact centers, the type defaults to site.
8. Select the physical location of the application or call-type contact center from the Geographic Site Region drop-down list.
   You do not select a geographic region for a skill-group contact center.
9. To specify the hours of business operation, type the open and close times within the selected time zone.
   The format is *hh:mm*.
   The open and closed times 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 data. During non-operational hours, the contact center displays gray in the CCAdv contact centers pane and is hidden from the WA contact centers pane.
10. To set the location of the contact center on the map, type the decimal latitude and longitude *OR* click the globe icon. The mapping window opens (Figure 13 on page 43).

Figure 13: Contact Center Map

  a. Click the pushpin tool.
  The pushpin displays on the map.
  b. Drag the pushpin to the correct location.

11. Click the `Save Location` button. The mapping window closes.
12. To save the contact center, click `Add Contact Center/New`.
    A confirmation message displays and the contact center displays in the list.

End of procedure

Procedure: Updating a contact center

Start of procedure

1. On the navigation bar, select `Contact Centers`.
   The `Contact Centers` page displays.
2. To display the details of a contact center:
   Select from the list
   OR
   Type at least two letters in the `Search Existing` field, click `Search`, and then select from the list.

3. Make edits.

> Note: Selecting `No` for the `Active` radio button, deactivates the contact center/site, deactivates the peripheral gateways, and prevents it from displaying on the Dashboard. Selecting `Yes` for the `Active` radio button, activates the contact center and associated peripheral gateways.

4. To save the changes, click the `Save Edits` button.
   A message confirms the update.

End of procedure

Procedure: Deleting an application contact center

Purpose:

Deleting an application contact center removes it from system administration selection lists and from the map on the Dashboard. Deleting an application contact center automatically removes it from distribution lists and users.

An application contact center cannot be deleted until all associated peripheral gateways and contact groups are removed. Call-type and skill-group contact centers cannot be deleted.

> Note: Deleting a call-type or skill-group contact center is not permitted.

Start of procedure

1. On the navigation bar, select `Contact Centers`
   The `Contact Centers` page displays.
2. To display the details of a contact center:
   Select from the list
   OR
   Type at least two letters in the `Search Existing` field, click `Search`, and then select from the list.
3. Click the `Delete` button.
   A confirmation window displays.
4. To confirm the deletion, click `OK`.
   A message confirms the deletion.

End of procedure

Peripheral Gateways

The `Peripheral Gateways` page (Figure 14) allows you to provide peripheral gateways meaningful, descriptive names and assign them to application contact centers. A peripheral gateway is a communications interface between a call distributor and call router. Assigning peripheral gateways to a contact center links the skill groups of the peripheral gateway to the contact center.

Note: The Peripheral Gateways page is for Cisco TDM data sources only.

Procedure: Assigning a peripheral gateway to an application contact center

An application contact center must be active before associating a peripheral gateway.

Start of procedure

1. To display the details of a peripheral gateway:
   Select from the list
   OR
   Type at least two letters in the `Search Existing` field, click `Search`, and then select from the list.
2. To activate the peripheral gateway, select `Yes`.
   An inactive peripheral gateway prevents data and alerts from displaying on the dashboard and from being included in the rollups.
3. To assign a peripheral gateway to a contact center, select a contact center from the `Assignment` drop-down list.

   Note: Changing the contact center moves existing rollups to the newly selected contact center. Changing the contact center with existing rollups to `Select contact center` deactivates the rollups for that contact center; however, reselecting the same contact center reactivates the rollups.

4. Click the `Save Edits` button.
   A confirmation message displays and the assignment and active status displays in the list.

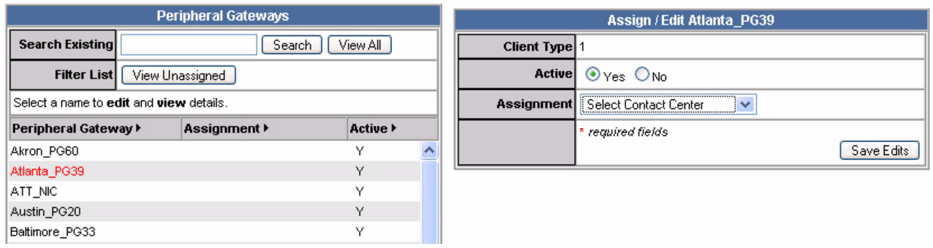

Figure 14: Peripheral Gateways Page

End of procedure

Viewing Unassigned Peripheral Gateways

To view the list of peripheral gateways not assigned to contact centers, click `View Unassigned`.

To display the whole list of peripheral gateways, click `View All`.

Contact Groups

The `Contact Groups` page (Figure 15) allows you to assign types and contact centers to a workforce management system's forecasting entities (forecast groups and staff group in Aspect eWorkforce Management and contact types in IEX TotalView). In Genesys Advisors, the term *contact group* is synonymous with the terms *forecast group*, *staff group*, and *contact type*. You must import contact groups from your WFM system and assign types, data sources, and contact centers before configuring rollups on the `Rollup/Workforce` page.

Note: WA does not control the IEX source names and locations; if IEX source names for a location are the same but one is in lower case and the other is in upper case then WA interprets them as two different source names.

The IEX source names, the eWFM and Genesys WFM source names must be unique.

For each contact group, you provide a:

- `Descriptive Name`—For single edit only. For multiple edits, the Descriptive Name is not available and the text Multiple Edit displays.
- `Type`—A contact group can be either a network contact group or a site contact group. Selecting a type filters the list of data sources in the Data Source drop-down list.

  Since IEX TotalView contact types are always site-specific, the corresponding Advisor Contact Group should be configured as a site contact group. Depending upon the configuration of the Aspect eWorkforce Management system, Forecast Groups may be either parent (network-level) or child (site-level) Forecast Groups, while Staff Groups may be either parent (network-level) or child (site-level) Staff Groups.

- When child (site-level) Forecast Groups are available, the administrator should configure them as site contact groups in Workforce Advisor, ignoring the parent (network-level) Forecast Groups.
- If only parent (network-level) Forecast Groups are available, then the administrator should configure them as network contact groups in Workforce Advisor.
- Child (site-level) Staff Groups are always available from Aspect eWorkforce Management. These should be configured as site contact groups in Workforce Advisor. Parent (network-level) Staff Groups should be ignored.
- For multiple edit, the `Type` field is not available.

- `Data Source`—Selecting a data source filters the list of contact centers in the `Contact Center` drop-down list.
- `Contact Center`—Typically, the network contact groups are mapped to a call type contact center and site contact groups are mapped to skill group contact centers.

The `Contact Groups` table displays the details of each contact group, including:

- `Name`—The name of the contact group provided by the workforce management system
- `Source`—The workforce management system that provided the contact groups (for example, Genesys Workforce Management, Aspect eWFM, IEX TotalView) and the Site ID (or the contact center ID) of the contact group from the Genesys Workforce Management
- `Group`—The type of contact group (for example, forecast or staff)
- `Active`—Indicates whether the contact group is active or not
- `Descriptive Name`
- `Type`—Indicates the type of contact center associated to the contact group: site or network
- `Contact Center`—The contact center associated to the contact group

Procedure:
Assigning contact groups to a type and contact center

Start of procedure

1. From the navigation bar, select `Contact Groups`.
   The `Contact Groups` page displays.
2. Select a contact group from the list.
   OR
   To update multiple contact groups at once:
   a. Select multiple `Selected` check boxes.
      A check mark displays in each selected check box.
   b. Click `Edit Selected`.
      The contact group details display.
3. If editing a single contact group, type a meaningful name in the `Descriptive Name` field.
   The descriptive name will display on the dashboard. If a descriptive name is not provided, the generated name displays on the dashboard.
   The `Descriptive Name` is not available for multiple edits. The descriptive name must be defined individually.
4. Select the type of contact group from the `Type` drop-down list.
   The `Type` field is not available for multiple edits.
5. Select the data source from the `Data Source` drop-down list.
6. To associate the contact group to a contact center, select a contact center from the contact center drop-down list.
7. To save, click `Save Edits`.
   A confirmation message displays and the details display in the table on the left.

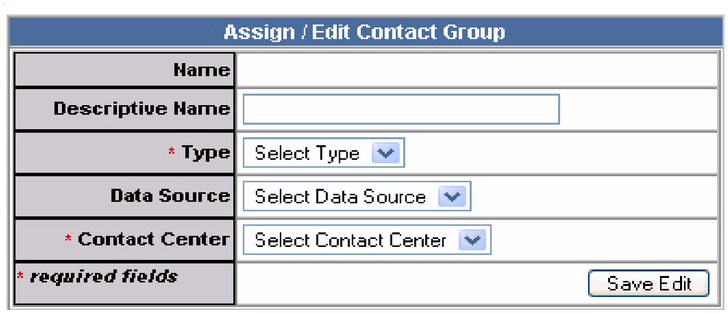

Figure 15: Contact Groups page

End of procedure

Procedure:
Updating a contact group

Start of procedure

1. To display the details of a contact group:
   select from the list
   OR
   type the first few letters in the `Search Existing` field, click `Search`, and then select from the list.
2. Type a meaningful name in the `Descriptive Name` field.
3. If no associations exist for the contact group on the `Contact Group Rollups` page, select a type from the `Type` drop-down list.
   The `Type` field is not available for multiple edits.
4. Select the data source from the `Data Source` drop-down list.
5. To associate the contact group to a contact center, select a contact center from the contact center drop-down list.
6. To save, click `Save Edits`.
   A confirmation message displays and the details display in the table on the left.

End of procedure

Application Groups

The `Application Groups` page (Figure 16) enables a system administrator to add, update and delete the summary groupings used to roll up applications on the dashboard.

Note: Application groups must be assigned to distribution lists to receive notifications generated by Contact Center Advisor and Workforce Option Case Management.

Procedure:
Adding a new application group

Start of procedure

1. Enter a name for the application group in the `Name` field.
2. To indicate an application group with no current call activity should be grayed out in the contact centers pane on the Contact Center Advisor dashboard and hidden on the Workforce Advisor dashboard, select `Yes` for `Zero Suppress`.
3. To save the new application group, click `Add Application Group`.
   A confirmation message displays and the application group displays in the list.

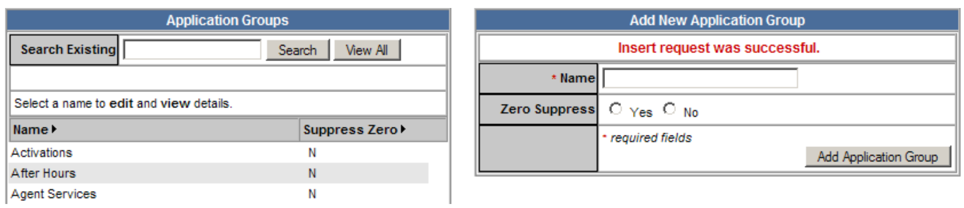

Figure 16: Application Groups page

End of procedure

Procedure:
Updating an application group

Start of procedure

1. To display the details of an application group:
   Select from the list
   OR
   Type the first few letters in the `Search Existing` field, click `Search`, and then select from the list.
2. Update the name or the `Zero Suppress` option.
3. To save edits, click the `Save Edits` button.
   A confirmation message displays.

End of procedure

Procedure:
Deleting an application group

Prerequisites

Before deleting an application group, you must remove its assignment from contact centers and rollups.

You cannot delete an application group if:

- A metric threshold is defined in the context of the application group.
- An active alert exists created by such a threshold.

Start of procedure

1. To display the details of an application group:
   select from the list
   OR
   type the first few letters in the `Search Existing` field, click `Search`, and then select from the list.
2. Click the `Delete` button.
   A confirmation page displays.
3. To confirm the deletion, click `OK`.

End of procedure

System Configuration

The `System Configuration` page (Figure 17) allows you to control various global capabilities in CCAdv and WA.

System Configuration—Tabs

The System Configuration section consists of the following three subsections presented as tabs:

- `Contact Center Advisor/Workforce Advisor` (displayed by default)
- `Data Sources`
- `Modules`

Contact Center Advisor/Workforce Advisor Tab

The `Contact Center Advisor/Workforce Advisor` tab displays the following fields:

- `Notification Refresh Rate`—Determines the frequency of distributing alert messages. The delay prevents unnecessary repetition of alert messages as the values change. Every minute, Contact Center Advisor and

Workforce Advisor checks for notifiable alerts and the time the e-mail was last sent. For each alert, if the time that the e-mail was last sent is older than the notification refresh rate, an e-mail is sent.

- `Threshold Trigger Delay Rate`—Controls how many minutes an alert must exist in a state exceeding a threshold before the application triggers an alert e-mail message and displays on the map. Peripheral Gateway alerts (Cisco ICM only) and manual alerts are an exception to the threshold trigger delay rate: they display immediately.
- `Application-to-Skill Group Relationships`—Determines if you can manually create relationships between an application and skill groups. The `Application-to-Skill Group Relationships` option must only be set once and before rollups are created. The default is `Auto Override`. For call types contact centers, the `Application-to-Skill Group Relationships` field must be set to `Auto Override` or `Manual`. The options are:
  - `Manual`—(Cisco ICM only) you manually assign skill groups to an application.
  - `Auto`—(Cisco ICM only) the relationships between skill groups and applications are imported.
  - `Auto Override`—The `Application-to-Skill Group Relationships` field must be set to `Auto Override.` For Cisco ICM, skill groups are automatically related to the application through peripheral gateways but you can assign or unassign skill groups manually.

  The consequences of changing the `Application-to-Skill Group Relationships` option are:

  - Changing `Manual` or `Auto Override` to `Auto` erases all manually added relationships without the ability to restore them; and thereafter, the interface will not allow you to create relationships manually.
  - Changing `Auto` or `Auto Override` to `Manual` prevents relationships from being imported from the source and erases all automatically imported relationships. Thereafter, all relationships must be created manually from the administration module.
  - Changing from `Auto` to `Auto Override` will not change the current set of the relationships. Thereafter, the administrator will be able to add more relationships manually.
  - Changing from `Manual` to `Auto Override` will trigger the automatic import of the relationships that exist at the source.

- `Display Skill Group Contact Center column`—Determines whether whether the `Contact Center` column is displayed in the column chooser of the `Skill Groups` pane, thereby controlling whether Dashboard users can see the Contact Center for a skill group.

Note: The update period for the contact routing system queries is the frequency that the data is pulled and the dashboard refreshed. The data refresh rate is not displayed on the page. It is in XML and can be changed, but is separately maintained so that it is not arbitrarily changed.

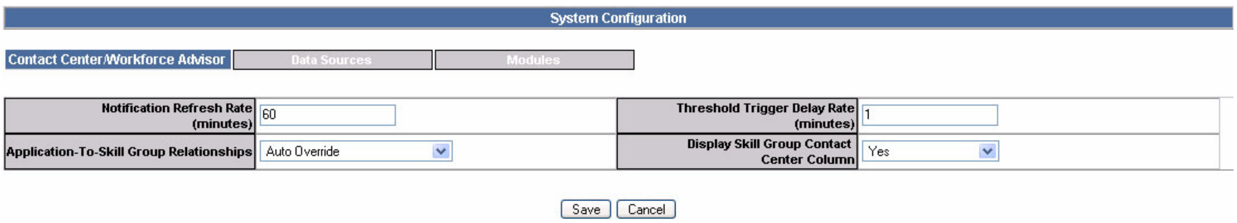

Figure 17: System Configuration–CCAdv and WA Tab

Data Sources Tab

The `Data Sources` tab displays a list of the real-time data sources connected to the Advisor suite.

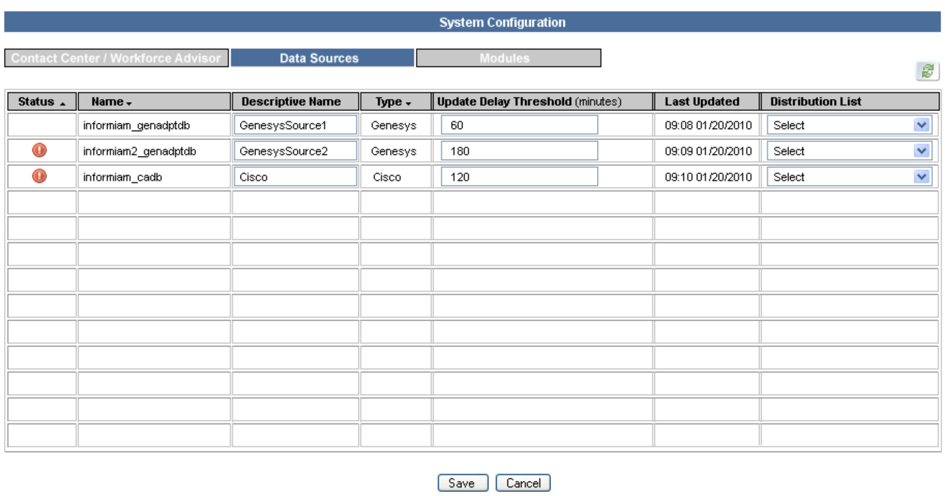

Figure 18: System Admin–Data Sources Tab

The fields represent the following:

- `Status`—Shows the current status of this data source. If a data source has exceeded the update delay threshold, then a red icon is displayed in this column next to that data source.

- `Name`—The configured name of the data source as it is in the `ICM_DATABASE` table. This field cannot be edited. This value can contain non-alphanumeric characters; for example, `[inf-redfox].LeeGraphing30min_awdb`, therefore it might need some sort of encoding.
- `Descriptive Name`—Descriptive name of the data source. Can be edited by the user and is a required field.
- `Type`—Underlying platform for the data source. Current supported values are `GENESYS` and `CISCO`. This value cannot be changed by the administrator through the UI.
- `Update Delay Threshold`—The maximum amount of time (in minutes) allowed between the last update time of the data source and the current time; exceeding this threshold triggers an alert. This field can be edited and is required. The minimum value that can be entered in this field is `1` and the maximum value is `30`.
- `Last Update Time`—The time of the last update from this data source in the time zone of the server on which the administration UI is running. This is the controller time and is a noneditable field.
- `Distribution List`—Distribution list to which to send e-mail to if the data source's controller time is not updated and the delay violates the delay threshold. A selection in this field is required. If no distribution list has been previously selected for a data source, the drop-down shows the `Select` option. Otherwise it shows the distribution list associated with the data source.

Modules Tab The `Modules` tab displays the names and URLs of individual modules of your installation.

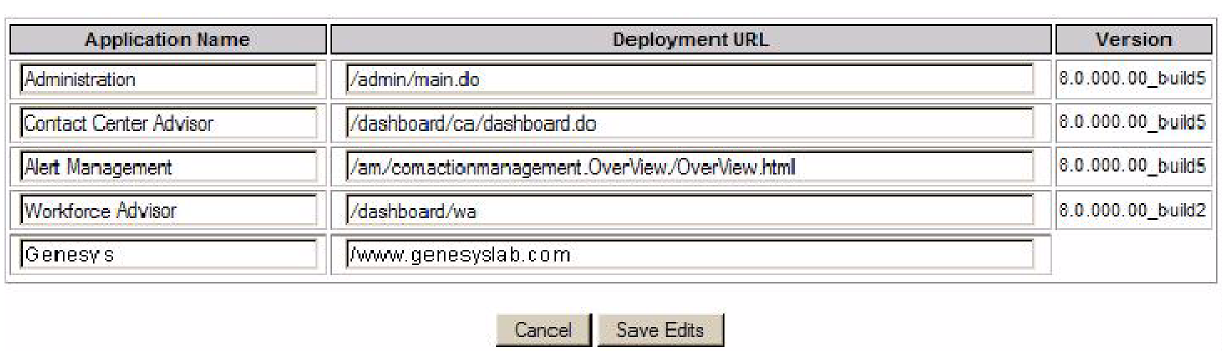

Figure 19: System Admin–Modules Tab

`Application Name`, `Deployment URL`, and `Version`—You can modify the application name that displays on the Genesys Advisor tabs that are used to switch between the applications.

You can add an external website to an Advisor tab. The URL must be completely qualified, that is, set to the full URL for the target application, for example, `/www.genesyslab.com`.

Procedure: Updating the system configuration

The system configuration changes take effect immediately.

Start of procedure

1. On the navigation bar, select `System Configuration`.
   The `System Configuration` page displays.
2. Update the values.

Note: Changing the `Application-to-Skill Group Relationships` option from `Manual` to `Auto Override` honors manual entries. Only the relationships that you exclude are removed. Changing from `Auto Override` to `Manual` honors manual entries. Changing from `Manual` or `Auto Override` to auto honors manual entries.

3. To save the updates to the database, click `Save Edits`.
   A confirmation message displays.
   OR
   To clear the changes and retain the original values, click `Cancel`.

End of procedure

Rollups

The `Rollups` page (Figure 20) allows you to define how information displays, summarizes, expands, and contracts in the contact centers pane on the dashboard.

For CCA, you assign skill groups, an application group, reporting region, and operating unit to an application for a contact center.

For WA, you assign an application group, reporting region, operating unit to a contact group; then you assign skill groups. How you assign skill groups depends on your data source.

A good practice for IEX TotalView is to assign a contact group to one or more applications: the skill groups assigned to the applications are, in effect, assigned to the contact group. For Aspect eWFM, you assign a contact group directly to skill groups on the `Skill Groups` page.

Depending on how the application-to-skill groups relationship is defined in system configuration, you may map skill groups to applications manually (if manual or auto override is defined) or automatically with Cisco ICM. For call type contact centers, the `Application-to-Skill Group Relationships` field must be set to `Auto Override` on the System Configuration page. For skill groups to display on the dashboard, the `Application-to-Skill Group` relationship must be created.

Note: It takes 24 hours for the highlighting between the applications and skill groups (CCAdv) and the contact groups and skill groups (WA) to function on the Dashboard.

The rollups for call-type contact centers must be configured first to make skill groups available for the skill group contact centers and to be able to directly associate skill groups to Aspect eWFM contact groups on the `Skill Groups` page.

For Cisco TDM, both base and non-base skill groups for application and call-type contact centers are imported. The enterprise name is used to distinguish skill groups with the same name but from different peripheral gateways.

To sort the data in the `Rollup` table, click on a column heading. The arrow in the down or up position indicates which column is sorted.

Notes:

1. The information supporting the highlighting of applications and skill groups between applications and skill groups is retrieved once a day to the Dashboard. If a relationship changes in the System Administration module, and you do not want to wait overnight to obtain the up-to-date highlighting, then the administrator must restart the XMLGen service.
2. For a newly created call-type contact center, to make call types appear on the Rollups page, you must be running the XMLGen service, and must wait for one import cycle of XMLGen to complete. During that cycle, XMLGen will set up call types for your new call center.
3. After assigning a skill group to a call type for one call type contact center, allow the full cycle of XMLGen to run in order to prevent assigning the same skill group to a call type in another call type contact center.

Navigating the Rollups page

Navigating to Application and Call Type Rollups

To navigate to the `Rollups` page for application or call type rollups, click `Rollups` from the navigation bar.

To return to the `Rollups` page for application or call type rollups from the context of contact group rollups, select `Rollups` from the navigation bar or the Contact Center Advisor tab.

Navigating to Contact Group Rollups

To navigate to the `Rollups` page for contact group rollups, click `Rollups` from the navigation bar, select a contact center and then the `Workforce Advisor` tab.

To return to the `Workforce Advisor` tab from the `Contact Center Advisor` tab when in the context of assigning applications to contact groups, select the `Workforce Advisor` tab.

Procedure:
Editing application rollups

For each application in a contact center, select the application group, reporting region, and operating unit in which you want the application to belong.

Start of procedure

1. From the navigation bar, select `Rollups`.
   The table defaults to the `Contact Center Advisor` tab.
2. Select a contact center from the drop-down list.
   If an application contact center is selected, the `Applications` list for the contact center displays.
   For a newly created call-type contact center, to make call types appear on the Rollups page, you must be running the XMLGen service, and must wait for one import cycle of XMLGen to complete. During that cycle, XMLGen will set up call types for your new call center.

Note: You cannot select a skill-group contact center.

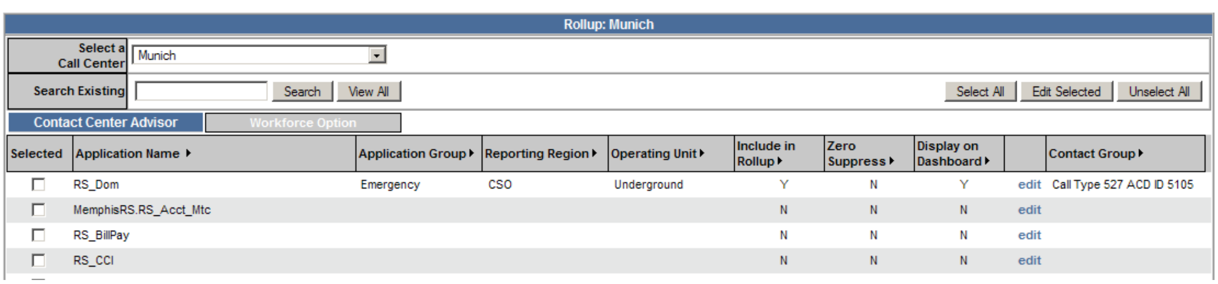

Figure 20: Rollups Page: Application Contact Center

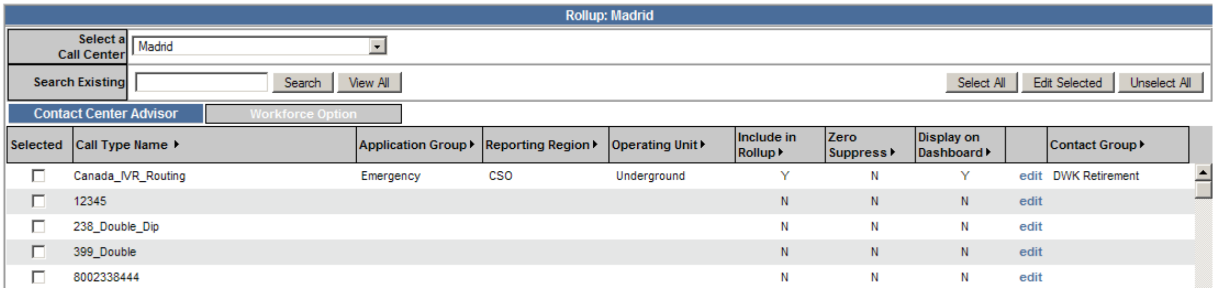

Figure 21: Rollups Page: Call-Type Contact Centers

3. To set up the rollup for an application, click `Edit`
   The details window opens (Figure 22).
   OR
   To set up the rollup for multiple applications.
   a. Select multiple `Selected` check boxes.
      You can only select multiple applications from the same list page.
      To navigate to the next or previous page in the returned list, click next or prev; and to navigate to the first or last page in the returned list, click first or last.
   b. Click `Edit Selected`.
      The details window opens.

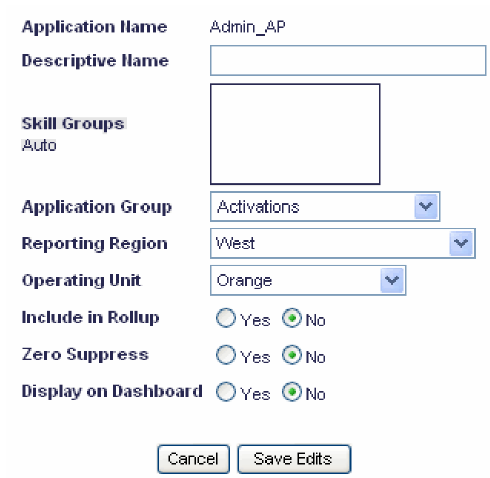

Figure 22: Rollup: Edit of Application Contact Centers

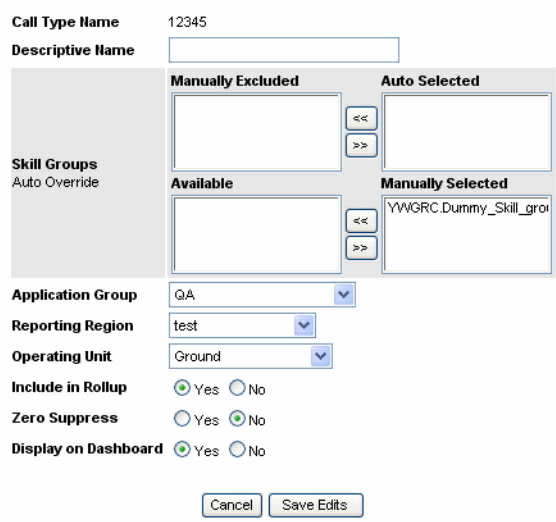

Figure 23: Rollup: Edit of Call-Type Contact Centers

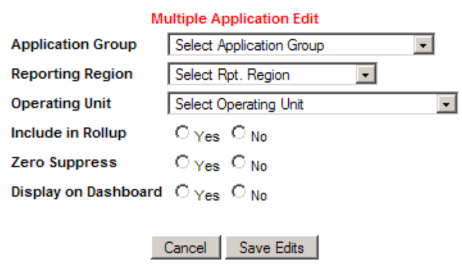

Figure 24: Rollup: Edit of Multiple Applications

4. If setting up a rollup for one application, type a descriptive name in the `Descriptive Name` field.
   The descriptive name will display on the dashboard. If a descriptive name is not provided, the generated name displays on the dashboard.
   The `Descriptive Name` is not available for multiple edits. The descriptive name must be defined individually.

5. If in system configuration, the application-to-skill groups relationship is manual or auto override, select the skill groups for the application from the Available list and move them to the `Selected` list by clicking the >> button.

Notes: 1. To avoid double counting, include call types with the same names in a rollup for only one call type contact center.
2. For a newly created call-type contact center, to make call types appear on the Rollups page, you must be running the XMLGen service, and must wait for one import cycle of XMLGen to complete. During that cycle, XMLGen will set up call types for your new call center.
3. Selecting skill groups is not available for multiple edits, you must edit individual applications to associate skill groups after creating the rollups (Figure 24).
4. Only the skill groups from the same external data source display for the selected application.

6. Define the rollup by selecting an application group, reporting region, and operating unit for the application.
Assigning the application group, reporting region, and operating unit is required for the application to display on the dashboard and to be included in the metric rollup for the specific grouping. In order for an application to be rolled up to any grouping, you must select an application group for it.
7. With `Include in Rollup` set to `No` and `Display on Dashboard` set to `Yes`, the application's metrics' values will not contribute to rolled up values, but the application will still appear in the `Applications` pane when you select the appropriate grouping.

Note: For the alerts to display on the dashboard, you must select `Yes` for `Include in Rollup`.

Only consider selecting `No` for `Include in Rollup` and `Yes` for `Display on Dashboard` for IVR/VRU-related applications in which you want to display IVR performance in the `Applications` pane but not in the contact centers pane. The IVR should handle 100% of the calls and the performance could indicate whether or not this is happening or if there may be a problem. In this case including these numbers in the rollup would inflate the performance of call handling by the agents.

8. To hide an application with no current call activity (that is, calls offered are zero) in the `Applications` pane on the dashboard, select `Yes` for `Zero Suppress`.

9. To save the rollup, click the `Save Edits` button.
OR
To save multiple rollups, click `Save Multiple Edits`.
A message confirms the update.

End of procedure

Procedure:
Editing a contact group rollup (for Workforce Advisor)

For each contact group in a contact center, you select the application group, reporting region, and operating unit in which you want the contact group to belong, then you assign skill groups. How you assign skill groups depends on your data source. For IEX TotalView, you assign a contact group to one or more applications: the skill groups assigned to the applications are, in effect, assigned to the contact group. For Aspect eWFM, you can assign a contact group to skill groups directly on the Skill Groups page.

Start of procedure:

1. From the navigation bar, select `Rollups`.
2. Select a contact center from the drop-down list.
3. Select the `Workforce Advisor` tab.
The `Workforce` table displays (Figure 25). The table displays the list of contact group to which this call center was assigned in the `Contact Groups` page.

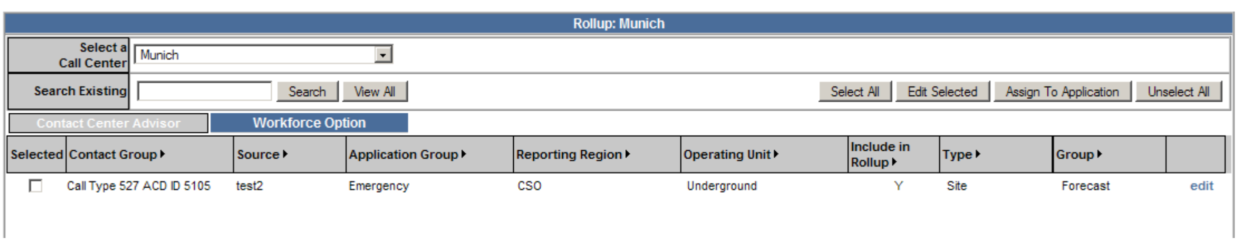

Figure 25: Rollup Page for Workforce Advisor

4. To configure the rollup for a contact group, click `Edit`.
The details window opens (Figure 26).
OR
To configure the rollup for multiple contact groups.
   a. Select multiple `Selected` check boxes.
   You can only select multiple contact groups from the same list page. To navigate to the next or previous page in the returned list, click next or prev; and to navigate to the first or last page in the returned list, click first or last.

b. Click `Edit Selected`.
The details window opens.

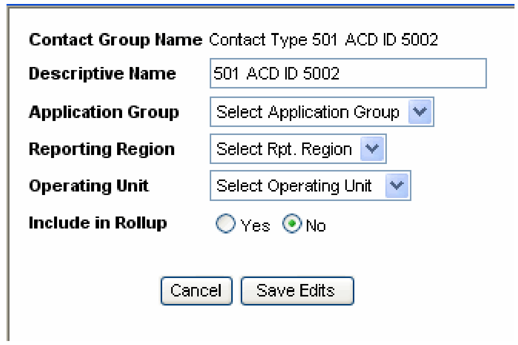

Figure 26: Rollup: Edit of IEX TotalView Contact Groups

5. If setting up a rollup for one contact group, type a descriptive name in the `Descriptive Name` field.
The descriptive name will display on the dashboard. If a descriptive name is not provided, the generated name displays on the dashboard.
The `Descriptive Name` is not available for multiple edits. The descriptive name must be defined individually.
6. Define the rollup by selecting an application group, reporting region, and operating unit for the contract group.
Assigning an application group is required for the contact group to be used in rollups and to display on the dashboard. Assigning a reporting region or operating unit is required for the contact group to be used in the rollup for that grouping, and to display on the dashboard when that grouping is selected.

Note: You can associate a different application group to a contact group than is associated to an application (or call type) but typically it would be the same.

---

7. To roll up the metric values of a contact group to an application group, contact center, regional level, or enterprise level, select `Yes` for the `Include in Rollup`.
Selecting `No` for `Include in Rollup` excludes the values from the rollup.

Note: For the alerts to display on the Dashboard, you must select `Yes` for `Include in Rollup`.

---

8. To save the rollup, click the `Save Edits` button.
OR
To save multiple rollups, click `Save Multiple Edits`.
A message confirms the update.

9. To assign applications to a contact group whose data source is `Application` or `Call Type`.

Note: If the contact group has a data source skill group, you cannot assign an application to it.

---

a. Click `Assign to Application`.
The `Contact Center Advisor Rollup` page opens. The context displays "Assign Contact Groups" followed by the contact center.
The applications for the selected contact center display.

b. To assign one application to a contract group, click `Edit`.
The `Edit Rollup` page opens (Figure 27).
OR
To assign multiple applications to a contract group:
Select multiple check boxes.
Click `Edit Selected`.
The `Edit Rollup` page opens (Figure 28).

c. Select a contract group from the drop-down field.

d. To save, click `Save Edits`.
The `Edit Rollup` page closes and the Rollups page displays.

Figure 27: Single Edit Rollup page

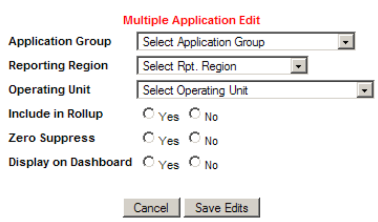

Figure 28: Multiple Edit Rollup page

End of procedure

Skill Groups

The `Skill Groups` page (Figure 29) allows you to determine which skill groups display in the `Skill Groups` pane on the dashboard. For call type contact centers, only the skill groups assigned to call types on the `Edit Rollup` page display on the `Skill Groups` page.

For skill group contact centers, you assign the skill groups previously assigned to a call type contact center. For skill groups to be available for assignment to skill group contact centers, the rollups for call-type contact centers must be configured first. If a skill group is later removed from a call type, the association to the skill group contact center is removed automatically.

The `Skill Groups` page also allows you to review the skill groups assigned to an application contact center, call-type contact center, application, call type, or contact group.

It takes 24 hours for the highlighting between the applications and skill groups (CCAdv) and the contact groups and skill groups (WA) to function on the Dashboard...

Note: Only applications from the same external data source (either Cisco or Genesys) as the skill groups are available for edit.

Procedure:
Assigning skill groups to a skill group contact center and determining skill groups to display

Purpose:

To assign skill groups to the skill group contact center and to determine which skill groups can display in the `Skill Groups` pane on the dashboard.

Start of procedure

1. From the navigation bar, select `Skill Groups`.
   The `Skill Groups` page displays.
2. Select an application or call-type contact center.
   The associated skill groups display in the table.
3. To filter the table by the skill groups mapped to a specific application, call type, or contact group, select one from the `Select an Application/Call Type/Contact Group` field.
   To display all skill groups, select `All`. To display only the skill groups not assigned to an application, call type, or contact group, select `None`.

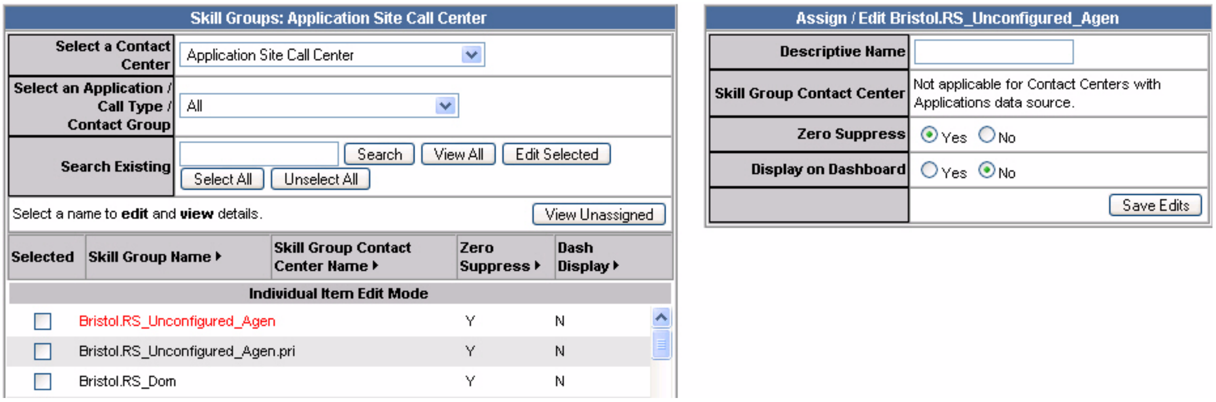

Figure 29: Skill Groups Page

4. Select a skill group from the list.
   OR
   To update multiple skill groups at once:
   a. Select multiple `Selected` check boxes.
      A check mark displays in each selected check box (Figure 30).
   b. Click `Edit Selected`.
      The skill group's details display.
5. If editing a single skill group, type a descriptive name in the `Descriptive Name` field.
   The descriptive name will display on the dashboard. If a descriptive name is not provided, the generated name displays on the dashboard.
   The `Descriptive Name` is not available for multiple updates. The descriptive name must be defined individually.

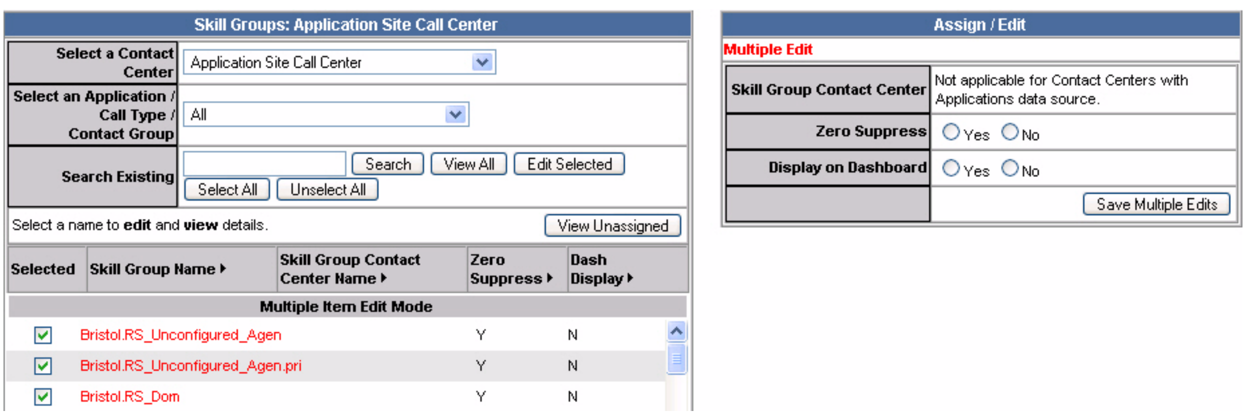

Figure 30: Skill Groups Page: Multiple Edits Page

6. To assign a skill group of a call-type contact center to a skill-group contact center, select a skill group contact center from the drop-down field.

   The `Skill Group` contact center drop-down field is not available for an application-site contact center. The `Contact Group` drop-down list displays

([Figure 31](#)). The contact groups in the list are filtered by the selected skill-group contact center.

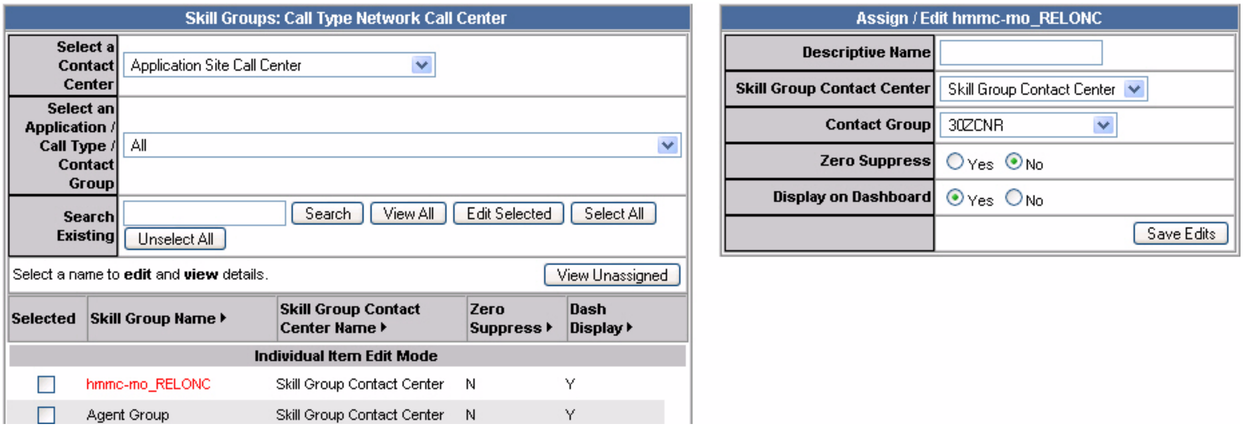

Figure 31: Skill Groups page: Contact Group drop-down list

7. If the skill groups for a call type-network contact center display, select a contact group from the `Contact Group` drop-down field. The `Contact Group` drop-down field does not display for site contact centers.
8. To prevent a skill group from displaying on the dashboard when no current call activity exists, select `Yes` for `Zero Suppress`.

> Note: If an agent is not logged in to the skill group *and* calls handled are zero *and* calls offered are zero, the skill group is hidden. Depending on your WA system configuration, logged in could be excluded from this calculation.

9. To make the skill group displayable on the dashboard, select `Display on Dashboard`.
10. To save a single skill group edit, click the `Save Edits` button.
    OR
    To save multiple skill groups, click `Save Multiple Edits`.
    A confirmation message displays.
11. To save, click `OK`.

End of procedure

Metrics

The Metrics page (Figure 32 on page 69) is a table used to set threshold and dashboard display attributes for skill group, and application, and workforce (contact group) metrics.

In release 8.0 metrics that are displayed on the Dashboard can be graphed. However, due to performance considerations, the number of metrics that can be graphed is controlled by a configurable property in the CCAdv database. While this limit can theoretically be set to any limit, it is recommended this limit be set to 5 metrics for release 8.0. A new column, `Chart`, has been added to the Metrics page that allows the administrator to determine whether a given application metric can be graphed or not.

You can choose which metrics display in the column chooser on the dashboard and you can update the description which also displays on the dashboard.

The direction sets expectations for the range. *Above* means that values above the defined number cause threshold violations and alerts. *Below* means that values below the defined number cause threshold violations and alerts. Both means that values above and below the defined numbers cause threshold violations and alerts.

Note: Metrics used only in calculations cannot be updated.

Specific information for configuring each metric includes:

- `Display Name`—To set the name displayed on the dashboard. The default is the name in the `Name` field. To display percentages over 100 as 100+, the display name must end with %, for example, `Dev%` and `Util%`.
- `Seq Num`—To set the order in which metrics display on the dashboard
- `Description`—A description of the metric.
- `Min` and `Max`—Validates the minimum and maximum limits of the values entered for the rule on the `Thresholds` pages.
- `Threshold`—Determines if warning and critical threshold values can be set up for the metric. If the `Threshold` checkbox is selected, the metric is available on the `Threshold` pages. If a threshold rule was defined, clearing the `Threshold` check box later, deletes the threshold rule. You cannot clear the `Threshold` checkbox if an existing threshold defined for this metric is currently causing an active alert.
- `Decimal`—Determines the decimal precision for the dashboard display.
- `Chart`—There are 3 possible values that the user can select in this column.
  - `None`—This metric will not be available to be graphed on the dashboard.
  - `Column` —The values of the metric are graphed using a column chart.
  - `Line`—The values of the metric are graphed as a line on the chart.
- `Display`—Check the check box to display the metric(s) that display in the Column Chooser on the Dashboard.

Only the `Now/5 Minute` metrics can be graphed in release 8.0. Therefore, if the administrator selects `AHT` as a metric that can be graphed, it is the 5-minute `AHT` metric that the user actually selects and graphs via the dashboard pop-up.

Updating a Metric

Changing the minimum and maximum values does not affect existing threshold rules. When you edit the threshold rule on the `Applications` or `Contact Group/Site Thresholds` page, the new minimum and maximum values display in the threshold value guideline. Clicking `Save Edits` validates the values.

Changes you make to metrics in this page do not take effect immediately. Because of internal caching of this data, it can take up to five minutes for the applications start using your changes. Thus, for your changes in this page to take effect on Dashboards:

- Wait at least five minutes after your last change.
- Users must either log out of the dashboard and log in again, or open the `Column Chooser` and choose `Default` from the `Select` menu.

Release 8.0 contains metrics for e-mail and Web chat, in addition to the voice metrics available previously. If you do not use e-mail or Web chat, deselect the check box for these metrics. E-mail and Web chat metrics are not available for Cisco-only environments.

Procedure:
Updating a metric

Start of procedure

1. On the navigation bar of the `Administration` page, select `Metrics`.
   The `Metrics` page displays.
2. To update the metrics, select a tab.
3. Update the metrics.
4. To define the sequence in which the metrics display on the dashboard;
   a. Type the numbers `1–10` for application metrics in the `SeqNum` field.
   b. Type the numbers `1–10` for workforce metrics in the `SeqNum` field.
   c. Type the numbers `1–14` for skill groups metrics in the `SeqNum` field.
5. To save the changes, click `UpdateSave`.
   A confirmation message displays.

End of procedure

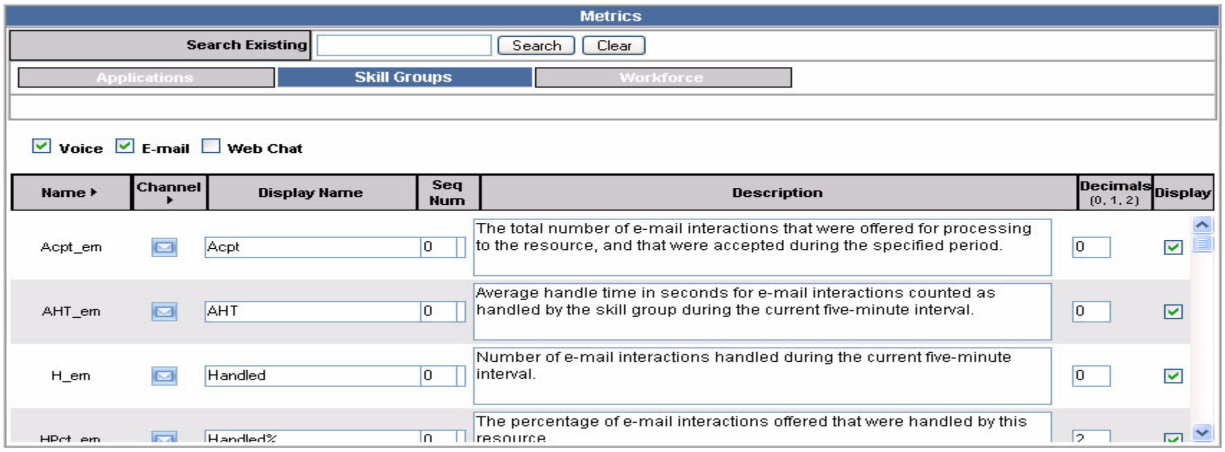

Figure 32: Metrics Page

Where the description of the metric appears in a scrollable field, you can edit the descriptive text.

Application and Contact Group Thresholds

The `Application Thresholds` page (Figure 33) allows you to define critical (red), warning (yellow) and normal conditions for each metric and application group. Only metrics that have the `Threshold` check box selected on the `Metrics` page display in the `Application Thresholds` list. The threshold violations display in the `Contact Centers` pane, `Applications` pane, and alerts display on the map.

The `Contact Group Thresholds` page (Figure 34) allows you to define critical (red), warning (yellow) and normal conditions for each metric and application group. Only metrics that have the `Threshold` check box selected on the `Metrics` page display in the `Contact Group Thresholds` list. The threshold violations display in the contact centers pane, `Contact Groups` pane, and alerts display on the map.

A threshold rule is configured by metric and application group, not by metric and contact group because the rollup requires application groups to determine how information displays in the contact centers pane on the Dashboard. The `Application Thresholds` page and the `Contact Group Thresholds` page display the threshold rule details including:

- `Application Group`—Affected application group name
- `Metric`—Display name of the affected metric
- `Threshold Values`—Either the values of the configured threshold rule display or `Not Set` if the baseline threshold is not set

You can add time-based alternative thresholds (that is, exceptions) for the calculation of alerts to vary your performance objectives. For instance, you may decide to lower the performance goals for metrics such as service level during the busiest periods of the day rather than increasing staff. Threshold exceptions override the normal (baseline) thresholds and substitute different thresholds for a defined time period. Exception rules can repeat daily, weekly, or monthly.

You cannot reset a threshold, to delete it, if is currently causing an active alert. To end the alert and make it inactive, change the threshold's values so that the metric no longer causes a violation. The alert will end. Then you can reset the threshold.

Application Thresholds

Search for Application Group [ ] Search View All

Application Group	Metric	Threshold Values	Edit	Reset	View Details
Activations	Acc%	Not Set	Edit	Reset	View
Activations	Active Alerts, average duration of	Not Set	Edit	Reset	View
Activations	Active Alerts, number of	Not Set	Edit	Reset	View

Figure 33: Application Thresholds Page

Contact Group Thresholds

Search for Application Group [ ] Search View All

Application Group	Metric	Threshold Values	Edit	Reset	View Details
Activations	Acc%	R10.0 G11.0 G89.0 R90.0	Edit	Reset	View
Activations	Act Abandoned %	Not Set	Edit	Reset	View
Activations	Actual Avg Delay	Not Set	Edit	Reset	View
Activations	Actual SL%	Not Set	Edit	Reset	View

Figure 34: Contact Group Thresholds page

Adding or Updating Thresholds

You can update the values for a threshold. Depending on the metric, the value may be acceptable above or below a certain value. If for example, the threshold is defined as acceptable below 50 and unacceptable above 75 then a value between 50 and 75 triggers a warning. If the value is above 75, a critical alert is triggered. If the threshold is defined as acceptable above 75 and unacceptable below 70 then a value between 70 and 75 triggers a warning. If the value is below 70, a critical alert is triggered. In WA, if the threshold is defined as both, the threshold values are defined to trigger if the value is below or above defined values. For example, values below 10 or above 90 may trigger a red alert, values between 80 and 90 or between 10 and 20 trigger a yellow alert, and values between 20 and 88 are acceptable.

Procedure: Updating a threshold

Start of procedure

1. On the navigation bar for CCA, click `Application Thresholds`.
   For WA, click `Contact Group Thresholds`.
2. To update a threshold, click `Edit`.
   The `Edit Threshold Settings` page opens (for application and call type thresholds, see Figure 35; for contact group thresholds, see Figure 36).

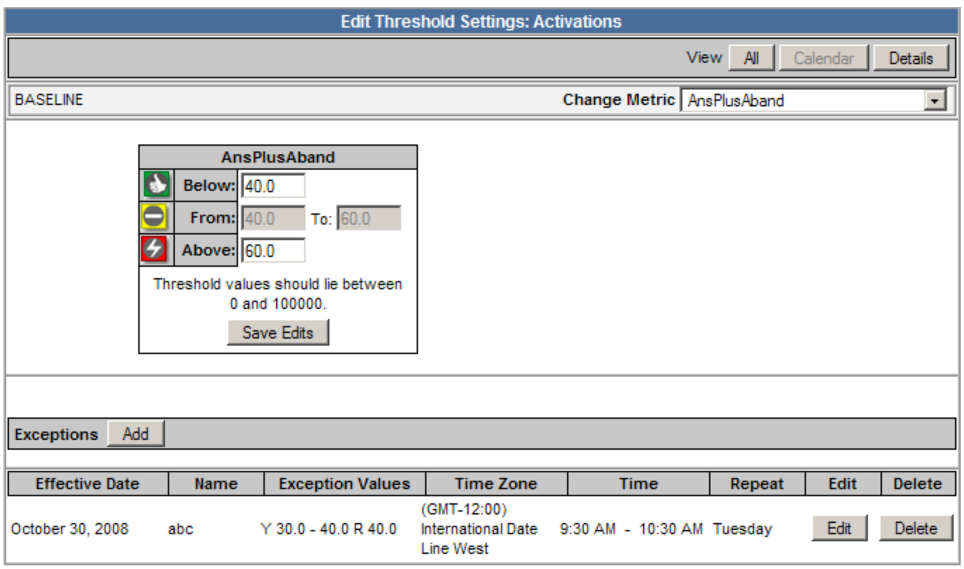

Figure 35: Edit Threshold Settings Page for Applications and Call Types

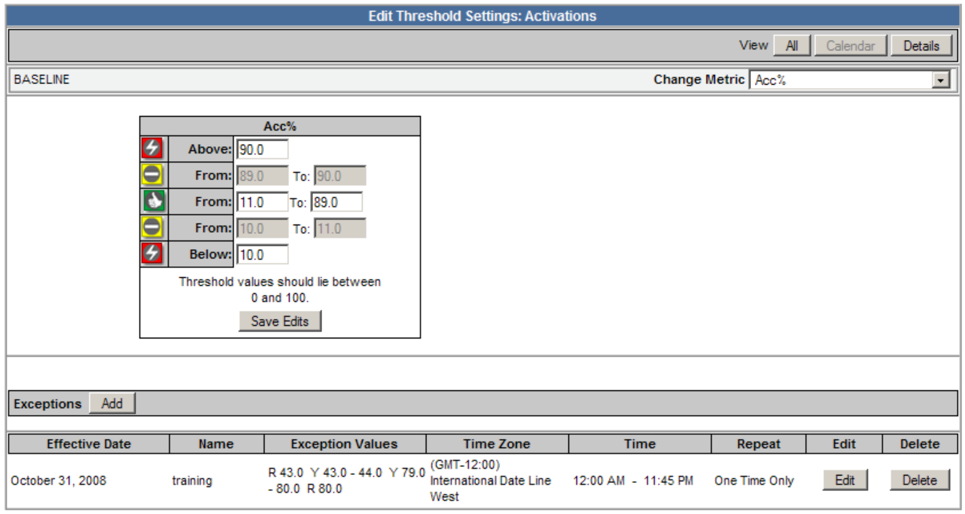

Figure 36: Edit Threshold Settings Page for Contact Groups

3. Type the values for the critical (red) range and normal (green) range in the fields.
   The warning (yellow) values are filled in automatically.
4. To save the changes, click `Save Edits`.
   A confirmation message displays. The values display on the `Thresholds` page.
   To see the effect of the modified threshold on the dashboard, log out and back in.

End of procedure

Adding Threshold Exceptions

Introduction

As part of the Advisor threshold and alert management capabilities, you can configure threshold exceptions. Exceptions are useful when certain periods of time perform differently than others. These differences are specific to the impact on threshold violations.

For example, even though call volume fluctuates significantly throughout the day, expected performance should be maintained throughout the day. Typically a metric target used for alerting (SL% for example) does not change just because other conditions change. However, certain conditions warrant exception usage as they are expected, understood and managed.

Many Advisor users have certain peak periods that the organization does not try and staff. For example, every Monday from 9:00 am to 11:00 am a call spike occurs following the weekend. Since that spike is not staffed to deliver typical SL% performance, there is a weekly expected period where normal thresholds are consistently violated. An Advisor threshold is useful in this case to lower the targets for SL% and thus avoid color-coded violations on the dashboard, alerts triggering to the map and the Action Management console as well as e-mail distributions going out.

Used correctly, threshold exceptions can avoid false alarms–notifying people of a problem that does not really exist. If the situation is expected, known and accepted, than there should be no reason to alert on it. Alerting should be isolated to the intended purpose of bringing attention to an issue that requires action.

Operation

You can add exceptions to override baseline threshold rules. When the exception is in effect, the values for the thresholds specified in the exception are used in all calculations and display of alerts.

Multiple thresholds may affect the same moment in time. In general,

- The threshold that started later and ended earlier is the one in effect.
- Non-repeating exceptions override repeating ones.

Specifically;

- If more than one threshold affects the same moment in time, the threshold that started later applies.
- If more than one threshold starts at the same time, then the one that ends the earliest applies.
- If more than one exception starts and ends at the same time, then the single instance exception supersedes the repeating exception.
- If more than one single instance exception starts and ends at the same time, then the exception created most recently applies.
- If more than one repeating exception applies, then the repeating exception created most recently applies.

The following example describes which of the multiple thresholds apply at a given period of time.

Table 2: Multiple Thresholds—Example

Baseline Rule and Exceptions	Time Period	Threshold Applied
Baseline (00:00 - 24:00)	00:00 - 07:59	Baseline
A: 1/11/2006 08:00 - 10:00; created 1/10/2006 09:00:02 AM EST	08:00 - 08:44	Exception C
B: 1/11/2006 09:00 - 11:00; created 1/10/2006 10:00:02 AM EST	08:45 - 08:59	Exception A

Table 2: Multiple Thresholds—Example

Baseline Rule and Exceptions	Time Period	Threshold Applied
C: 1/11/2006 08:00 - 08:45; created 1/10/2006 11:00:02 AM EST	09:00 - 10:59	Exception B
D: Repeat Weekly 09:00 - 13:00; created 1/8/2006 11:00:02 AM EST	11:00 - 12:59	Exception E
E: Repeat Monthly 09:00 - 13:00; created 1/9/2006 09:22:13 AM EST	13:00 - 23:59	Baseline

Threshold violations are raised as soon as they exist, but not before. For instance, from 07:55 - 08:50, assume a metric value is not a violation of the baseline threshold; however, it is a warning (yellow) violation according to Exception C. Therefore, the warning violation will occur at 08:00 and persist until 08:44 (assuming that Exception A is not a violation).

To determine when alerts are generated and displayed on the map and when e-mails are sent, the threshold trigger delay begins counting when the violation is raised. If the violation disappears before the threshold trigger delay because either the actual metric came back into compliance or the threshold changed, then an alert is not raised. If the violation changes (from yellow to red or red to yellow), either because the actual metric moved or the threshold changed, the trigger delay is calculated from when the metric first passed out of compliance (into yellow or red) and the alert, if generated, reflects the current state of the violation.

For exceptions, the start and stop time fields are relative to the contact center. The time zone is used to determine the times. For example;

- For contact centers in PST, typing the start time 6:00 AM and stop time 8:00 AM is 6:00 AM to 8:00 AM PST (that is, 14:00 -16:00 GMT);
- For contact centers in EST, typing the start time 6:00 AM and stop time 8:00 AM is 6:00 AM to 8:00 AM EST (that is, 11:00-13:00 GMT).

Procedure:
Adding an exception

Start of procedure

1. From the Edit Threshold Settings page, click Add.
   The Add Exception page displays (Figure 37).
2. Type the values for the critical (red) range and normal (green) range in the fields.
   The warning (yellow) values are filled in automatically.
3. Type a name for the exception in the Name field.
4. Select the time zone from the drop-down field.
   The values are converted to UTC prior to saving them in the database.
5. Select when the exception starts from the Start Time drop-down list.
   Select the hour and 15-minute increment on a single day.
   The start time must be less than the end time and range from 00:00 – 23:45.
6. Select when the exception ends from the End Time drop-down list. Select the hour and 15-minute increment on a single day.
   The end time must be greater than the start time and range from 00:15 – 24:00.
7. Specify the date the exception applies from the Effective Date calendar.
8. Select the frequency that the exception repeats from the Repeat drop-down list. The default is One Time Only.
9. If the exception repeats weekly, select which day of the week the exception repeats.
10. If the exception repeats monthly, select which day of the month the exception repeats.
11. To save the exception, click Save Edits.
    A confirmation message displays.
    The exception displays in the table.
12. Return to the Edit Threshold Settings page by clicking the Baseline button.

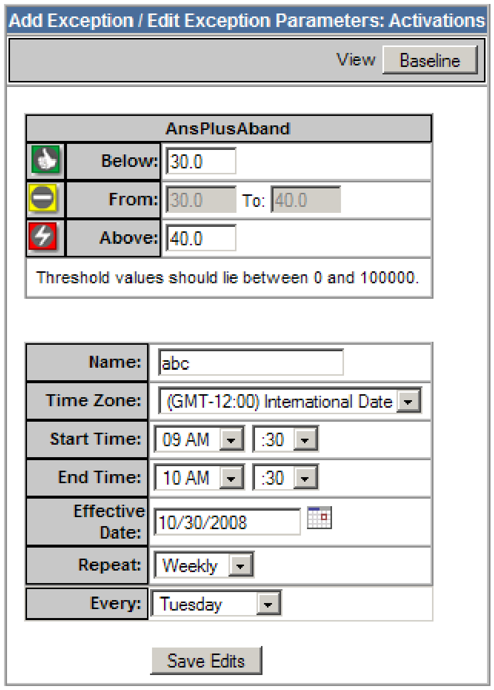

Figure 37: Application Threshold Exception page

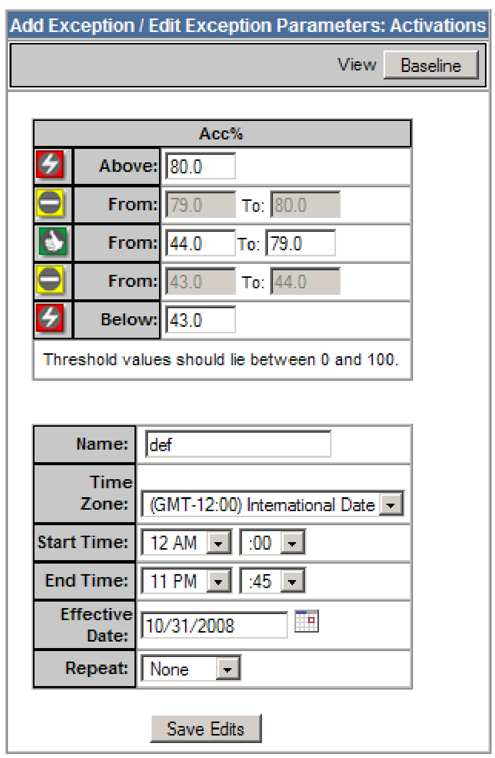

Figure 38: Contact Group Threshold Exception page

End of procedure

Filtering by Application Groups

On the Application Thresholds page or Contact Group Thresholds page, the Thresholds list contains a list of each application group by each metric. You can filter the list to display the metrics in a single application group.

Note: Only metrics that have the Threshold check box selected on the Metrics page display in the Thresholds list.

Procedure: Filtering lists

Start of procedure

1. Type a few letters of the name in the Search for Application Group field.
2. Click Search.
   The list redisplays based on the search criteria.
   To redisplay the whole list, click View All.

End of procedure

Displaying Threshold Rules and Exceptions

You can display the details of a single threshold rule for an application group and metric or you can display a summary of all of the baseline threshold rules and exceptions for an application group:

Procedure: Displaying threshold rule details

Start of procedure

1. Navigate to the Application Thresholds or Contact Groups Thresholds page.
2. To display a single threshold rule for an application group and metric, on a row click Edit.
   The baseline details display in the top half of the Edit Threshold Settings page (Figure 35). The exceptions list displays in the bottom half.
   OR

   To display a summary of all of the baseline threshold rules and exceptions for an application group, click View.

Alternatively, from the `Edit Threshold Settings` page, click `Details`. All of the baseline thresholds display in the `Threshold Settings Details` page (Figure 39). To display the exceptions, click the + button.

3. To return to the `Application Thresholds` or `Contact Groups Thresholds` page, click `<<Back`.

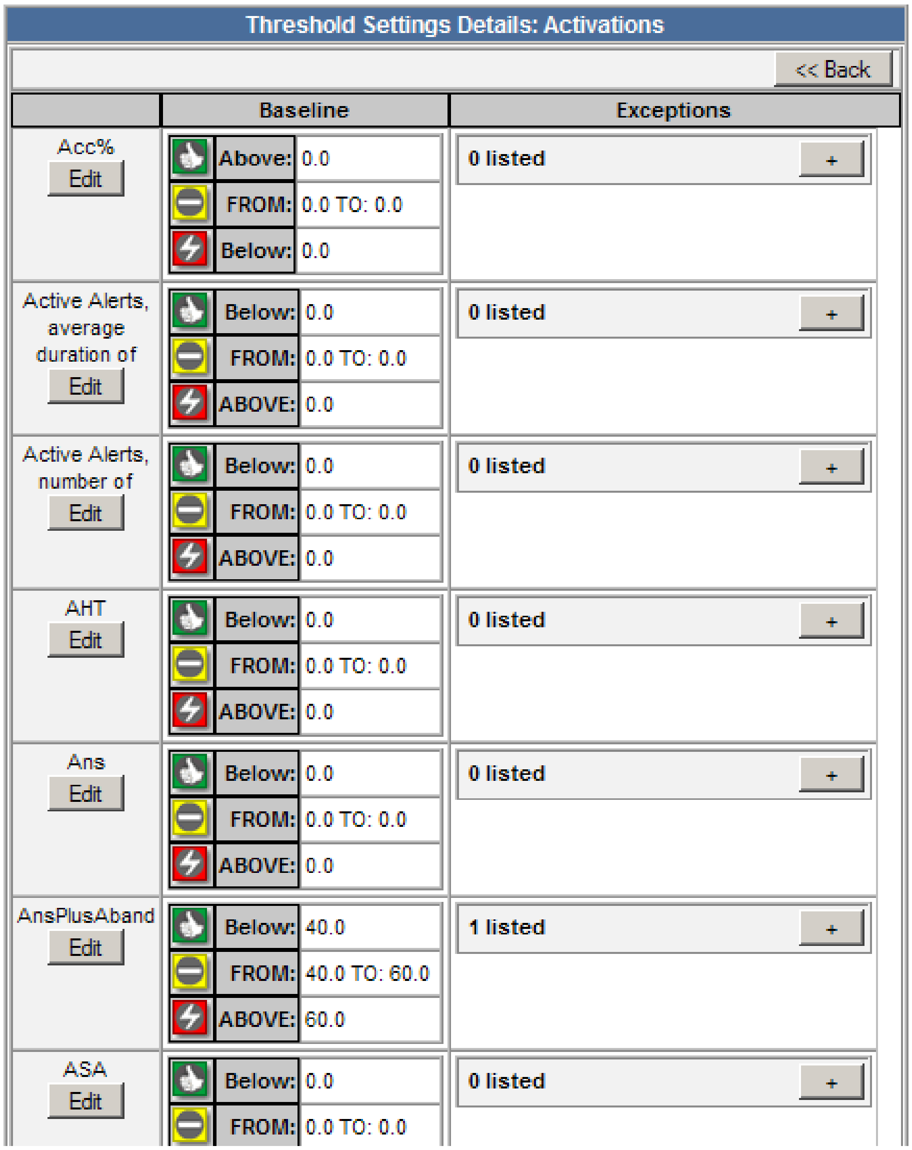

Figure 39: Threshold Setting Details Page

End of procedure

Procedure:
Displaying the threshold rules in a table

You can display the threshold rules and exceptions in a table view, where the rows are the periods of the day and the columns are the days of the week. You can display one day's or one week's worth of exceptions at a time.

Start of procedure

1. Navigate to the `Edit Threshold Setting` page.
2. Click `?Table`.
3. To view the threshold rules and exceptions for the day, click `View by: Day`.
4. To view the threshold rules and exceptions for the week, click `View by: Week`.

End of procedure

Procedure:
Deleting a baseline threshold

You cannot delete a threshold rule if it is causing an active alert.

Start of procedure

1. From the `Thresholds` page for a metric, click `Reset`.
   The threshold values display “`Not Set`”.

End of procedure

Procedure:
Deleting threshold exceptions

You cannot delete an exception if it is causing an alert.

Start of procedure

1. From the `Thresholds` page for a metric, click `Edit`.
   The `Edit Threshold Settings` page displays.
2. In the `Exceptions` table, click the `Delete` button on the corresponding row.
   The exception is deleted.

End of procedure

Thresholds and Notifications

A threshold violation escalates to an official “alert” based on persistently remaining above or below the threshold target for a specific period of time. This is set on the `Administration System Configuration` page. Two parameter settings are important for managing notifications:

- `Threshold Trigger Delay Rate`
  This parameter controls how many minutes a threshold violation must exist in a state exceeding a threshold before the application triggers an alert e-mail message and displays on the map. Peripheral Gateway alerts (Cisco ICM only) and manual alerts are an exception to the threshold trigger delay rate—they display immediately.
- `Notification Refresh Rate`
  This parameter determines the frequency of distributing alert messages. The delay prevents unnecessary repetition of alert messages as the values change. Every minute, Advisors checks for notifiable alerts and the time the e-mail was last sent. For each alert, if the time that the e-mail was last sent is older than the notification refresh rate and the violation has changed priority since the e-mail was last sent, an e-mail is sent.

Typically a `Threshold Trigger Delay Rate` would be in the 10–30 minute range and is entirely dependent upon the urgency and severity of issues. The `Notification Refresh Rate` may or not even be relevant. Many organizations are content to send an e-mail notification only once. Others with critical performance targets may want to know if an alert is still active and prefer an updated e-mail send.

While these two configuration settings are very important to the notification function, it is important to remember that how the root thresholds are set is the most important consideration.

Threshold levels, which drive alerts, should be set carefully and periodically reviewed for tuning requirements. If a threshold is constantly in a violated state, than it is probably set too tight for the current capabilities of the operating environment. If, when an alert is triggered, no action will be taken or, at the least, no immediate value is delivered in knowing about that alert, it may be better to remove it.

The final variable in the notification process is distribution lists. Careful understanding of the goal(s) of the notification will influence successful utilization of alert notifications. E-mail notifications should be targeted to users that really need to know about a situation regardless of their location. The users are often responsible for taking the appropriate action to address the situation so time is of the essence.

Distribution lists can be set up to finely target the desired audience. The list can be based on the type of alert (Business, Technical), the severity of the alert (`Warning, Critical`) and the Location and/or the Application Group affected by the alert. All of these variables allow for finely targeted e-mail notifications to just the right audience.

Some organizations may prefer to distribute yellow/cautionary alerts to a small (sometimes one person) group that is responsible for the individual business unit or location affected. If the alert hits a red/critical state, the distribution widens and deepens to all potentially affected sites as well as up the management chain.

Distributions, like many other aspects of Advisor, will rarely perform well if kept static. The business environment changes; performance targets change; personnel change. Regular and periodic tuning is required to ensure optimal utilization of these and many other Advisor capabilities.

Genesys advises having a documented process that outlines and links the various Advisor capabilities and settings to the broader customer care operating model. A simple example of this would be to document the process flow and impact that the addition of a group of call queues would have on Advisor. Those queues would need to be mapped to an Application Group; thresholds would be set; notifications would be set.

Manual Alerts

Manual alerts allow for the distribution of information to Advisor users. These manual alerts are useful for quickly disseminating information to the field via the Dashboard.

The `Alerts` page (Figure 40) allows you to add an alert message manually. The alerts display, based on the users' viewing rights, in the carousel and the `Alerts` pane in the Map pane of CCAdv and WA.

There are two types of manual alerts:

- Technical alerts (T) (CCAdv only)
- Business alerts (B)

And there are two alert severities:

- 1 (red)
- 2 (yellow)

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 `Alerts` panel. If only a skill-group contact center is selected, the skill-group contact center alert displays in the `Alerts` panel.

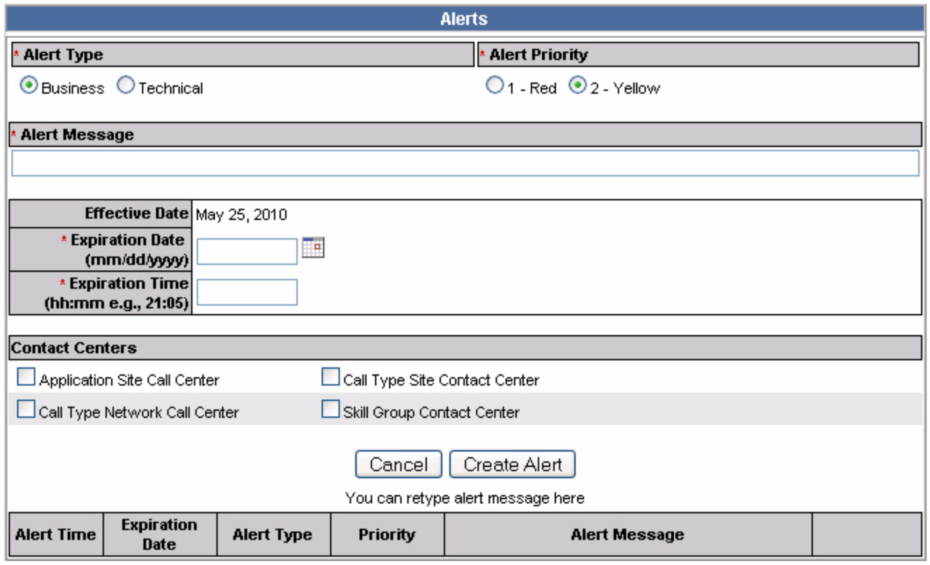

Figure 40: Alerts Page

Adding a Manual Alert

Procedure: Adding a manual alert

Start of procedure

1. Choose the alert type.
2. Choose the alert priority.
3. Enter the text of the alert message.
   The text displays in the carousel and the `Alerts` panel on the dashboard.

   Note: The text should be no longer than 24 characters.

4. To determine the duration of the displayed message, type the expiration date and the expiration time.
   Use the 24-hour clock relative to the eastern time zone.
5. To choose the affected contact centers, select the associated check boxes.
6. To add the alert, click `Save Edits`.
   A confirmation message displays. The alert displays in the `Alerts` panel

End of procedure

Procedure:
Updating a manual alert

Start of procedure

1. Type the updated message. You can only update the message.
2. Click the `Save Edits` button when complete.
   A message confirms the update.

End of procedure

Procedure:
Deleting a manual alert

Deleting a manual alert removes it from the `Alerts` list and from the dashboard.

Start of procedure

1. Click the `Delete` button beside the alert to be deleted.
   A confirmation window displays.
2. To confirm the deletion, click `OK`.
   A message confirms the deletion.

End of procedure

Users

The `Users` page (Figure 41) allows you to add or maintain users as well as specify their authority to view specific contact centers and application groups. Users with the admin role can add users and other administrators, as well as set up threshold rules and relationships used on the dashboard. Users with the admin role can log in to the administration component and use its functionality.

You also configure the modules a user has access to, including:

- CCAdv
- WA
- Administration
- Alert Management
  Users with access to either CCAdv or WA automatically have access to Alert Management.

- Resource Management
  If installed, the check box is available if either the `Contact Center Advisor` or `Workforce Advisor` check boxes are selected.
  - If Contact Center Advisor, Workforce Advisor and Resource Management are selected, unselecting Contact Center Advisor and Workforce Advisor unselects Resource Management automatically.
  - If only Contact Center Advisor and Resource Management are selected, unselecting Contact Center Advisor unselects Resource Management automatically.
  - If only Workforce Advisor and Resource Management are selected, unselecting Workforce Advisor unselects Resource Management automatically.
- External Website
  If a URL is defined on the System Configuration page, the check box displays and is available for selection.

Once authenticated, the user can switch between the modules by selecting an application's tab. If a user attempts to access an application for which they have no rights, a message displays explaining that access is not granted and to please contact the administrator.

Note: Only users and contacts that are added to a distribution list receive e-mail notifications.

Only the information and alerts for the contact centers and application groups a user is assigned to display on the dashboard. In CCAdv, the user permissions are the union of contact centers and application groups. In WA, the user permissions are the intersection of contact centers and application groups. The National Enterprise Performance summary is not filtered by the user's assignment to contact centers s or application groups.

Procedure: Adding a user

You must add users in the CCAdv/WA Administration module. Adding a user adds a contact which can be added to a distribution list.

Start of procedure

1. Select the `Contact Center Advisor` and `Workforce Advisor Administration` tab.
   On the navigation bar, select `Users`.
   The `Users` page displays.
2. Complete the required fields:
   - `First Name`—The user's given name

- `Last Name`—The user's family name
- `User Name`—Must contain more than three characters.
- `Password`—Must contain three to 18 characters
- `Effective Date`—To define the duration of the user's access, click the calendar icon and select the effective and expiration dates. The expiration date is optional.
- `Validation Question` and `Validation Answer`—Informational only and not currently validated.
- `Role`—Select either the `admin` role or `user` role from the drop-down list. The default is `user`.
- `Module Access`—To select the applications the user can access, select the `Module Access` check boxes.
  The admin role is permitted to access both the System Administration module and the dashboards. The user role is only permitted to access dashboards.

Note: An administrator for Frontline Advisor must also be an administrator for Contact Center Advisor.

- E-mail—The e-mail address is used to send alert notifications

3. Click the `Add User` button.

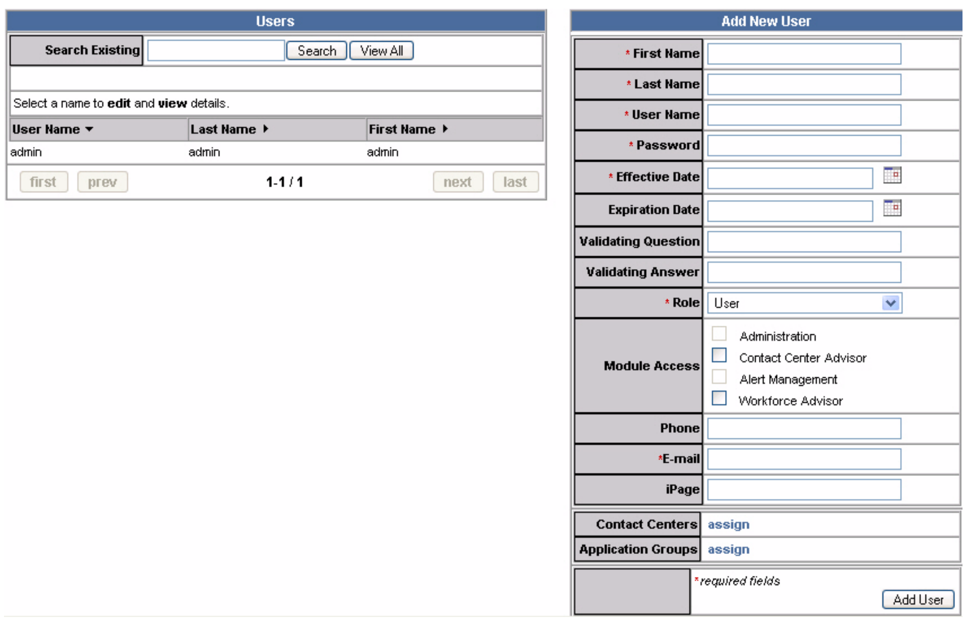

Figure 41: Users Page

End of procedure

Procedure: Updating the profile of a user

Start of procedure

1. Select the `Contact Center Advisor and Workforce Advisor Administration` tab.
2. On the navigation bar, select `Users`.
   The `Users` page displays.
3. To display the details of a user:
   Select from the list
   OR
   Type the first few letters in the `Search Existing` field, click `Search`, and then select from the list.
   To navigate to the next or previous page in the returned list, click next or prev; and to navigate to the first or last page in the returned list, click first or last.
4. Complete edits.
5. To save the edits, click the `Save Edits` button.
   A confirmation message displays.

End of procedure

Procedure: Deleting a user

Delete a user to remove access to the Advisors. Because adding a user automatically adds a contact, deleting a contact automatically deletes the user and removes the user from the distribution list. You cannot delete a user if:

- The user is the creator of a cause, key action, key action report, or metric library.
- The user's contact is the responsible assignee of a key action report.

Note that you can provide an expiration date instead of deleting a user to avoid the need to reenter the user's information in the future.

Note: If your company uses LDAP and users are deleted from LDAP, you must also manually delete them from the Advisors administration component.

Start of procedure

1. From the `Administration` module, select `Users` on the navigation bar.
   The `Users` page displays.
2. To display the details of a user:
   Select from the list
   OR
   Type at least two letters in the `Search Existing` field, click `Search`, and then select from the list.
   To navigate to the next or previous page in the returned list, click next or prev; and to navigate to the first or last page in the returned list, click first or last.
3. Click the `Delete` button.
   A confirmation window displays.
4. To confirm the deletion, click `OK`.
   A message confirms the deletion.

End of procedure

Contacts

The `Contacts` page (Figure 42) allows you to add and update contact profiles. Add contacts to make them available for inclusion in a distribution list or to assign to actions on key action reports. Only contacts added to a distribution list receive notifications. Contacts do not have access to the modules of Genesys Advisors. Users do have access.

Procedure: Adding a new contact

Start of procedure

1. On the navigation bar, select `Contacts`.
   The `Contacts` page displays.
2. Complete the fields.
3. To save the contact, click the `Add Contact` button.
   A confirmation message displays and the contact displays in the list.

Figure 42: Contacts Page: Add

End of procedure

Procedure:
Updating the profile of a contact

Start of procedure

1. On the navigation bar, select `Contacts`.
   The `Contacts` page displays.
2. To display the details (Figure 43) of a contact:
   Select from the list
   OR
   Type a least two letters in the `Search Existing` field, click `Search`, and then select from the list.
   To navigate to the next or previous page in the returned list, click next or prev; and to navigate to the first or last page in the returned list, click first or last.
3. Make edits.
4. To save the updates, click the `Save Edits` button.
   A message confirms the update.

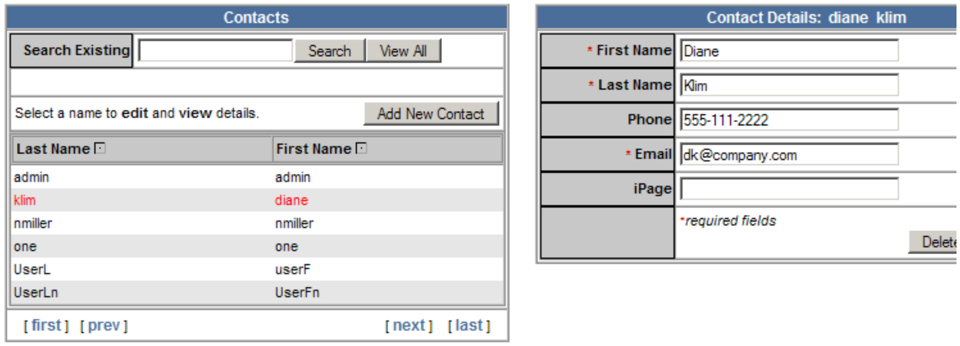

Figure 43: Contacts Page: Edit/Delete

End of procedure

Procedure: Deleting a contact

Deleting a contact automatically removes it from the distribution list it was included in. Deleting a user automatically deletes the corresponding contact. You cannot delete a contact if it is the responsible assignee in a key action report.

Contacts that are added automatically when adding a user on the Users page must be deleted from the `Users` page.

Start of procedure

1. On the navigation bar, select `Contacts`.
   The `Contacts` page displays.
2. To display the details of a contact:
   Select from the list
   OR
   Type at least two letters in the `Search Existing` field, click `Search`, and then select from the list.
   To navigate to the next or previous page in the returned list, click next or prev; and to navigate to the first or last page in the returned list, click first or last.
3. Click the `Delete` button.
   A confirmation window (Figure 44) displays.
4. To confirm the deletion, click `OK`.
   A message confirms the deletion.

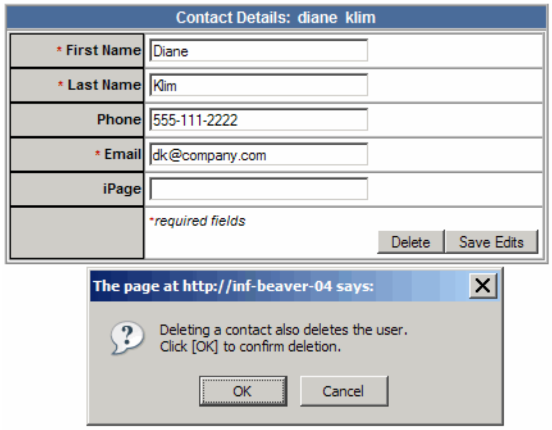

Figure 44: Contacts Page: Delete

End of procedure

Distribution Lists

CCAdv and WA have the ability to generate and distribute e-mail notifications to specified distribution lists (Figure 45). These lists are associated with a specific type of alert. The types are T1and T2 for technical alerts, and B1 and B2 for business alerts. (For more information about alerts, "Manual Alerts" on page 81) The message notification is delivered to all contacts contained in the list.

Note: Contact centers and application groups must be assigned to distribution lists in order for contacts to receive e-mail notifications about threshold violation alerts or peripheral gateway offline alerts that affect the application groups or call centers.

Procedure: Adding a distribution list

Start of procedure

1. On the navigation bar, select `Distribution Lists`.
   The `Distribution Lists` page displays.
2. Enter the name of the distribution list.
3. To select the effective date, click the calendar icon.
4. To set the activation of the distribution list, select `Yes` or `No`.
   The default is `Yes`.

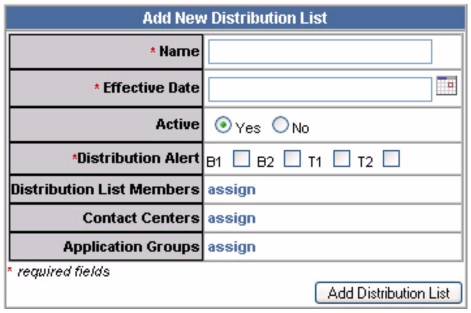

Figure 45: Distribution Lists Page: Add

5. Select the distribution alert type.
6. To select the distribution list members:
   a. Click `Assign` from the section.
      The `Contacts Search` dialog opens.
      Type at least two characters of the last name.
   b. Click `Search`.
      A list of names displays.

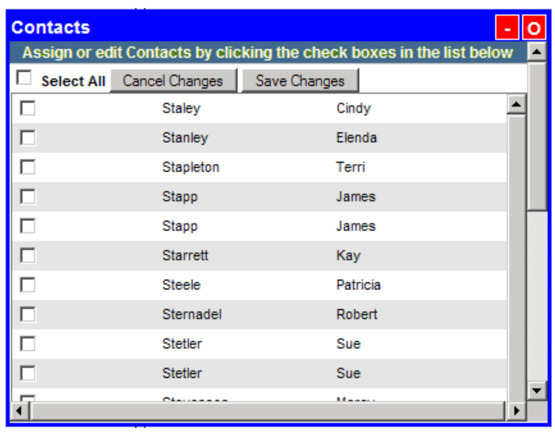

Figure 46: Distribution List: Contacts List

7. Select individual contacts or the `Select All` check box.
   If you select individual distribution list members, you must assign manually any members added in the future. Selecting the `Select All` check box assigns all existing distribution list members and automatically assigns any added in the future.
8. To select the affected contact centers, click `Assign` from the section, select individual contact centers or the `Select All` check box, and click `Save Changes`.
   If you select individual contact centers, you must assign manually any

contact centers added in the future. Selecting the `Select All` check box assigns all existing contact centers and automatically assigns any added in the future.

> Note: When assigning a network contact center, also add its related skill group contact centers.

9. To select the affected application groups, click `Assign` from the section, select individual application groups or the `Select All` check box, and click `Save Changes`.
   If you select individual application groups, you must assign manually any application groups added in the future. Selecting the `Select All` check box assigns all existing application groups and automatically assigns any added in the future.
10. Click the `Add Distribution List/Add New` button.
   A confirmation message displays.

End of procedure

Procedure: Updating a distribution list

Start of procedure

1. On the navigation bar, select `Distribution Lists`.
   The `Distribution Lists` page displays.
2. To display the details of a distribution list:
   Select from the list
   OR
   Type at least two letters of the name in the `Search Existing` field, click `Search`, and then select from the list.
3. Make edits.
4. To save the updates, click the `Save Edits` button.
   A message confirms the update.

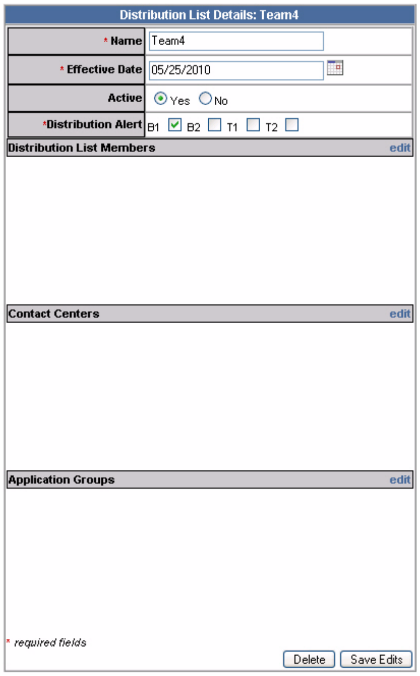

Figure 47: Distribution Lists Page: Edit/Delete

End of procedure

Procedure:
Deleting a distribution list

Delete a distribution list to stop subsequent alert notifications. Note that you can deactivate a distribution list instead of deleting it to avoid the need to reenter it in the future.

Start of procedure

1. On the navigation bar, select `Distribution Lists`.
   The `Distribution Lists` page displays.
2. To display the details of a distribution list:
   select from the list
   OR
   type the first few letters in the `Search Existing` field, click `Search`, and then select from the list.
3. Click the `Delete` button.
   A confirmation window displays.

4. To confirm the deletion, click OK.
   A message confirms the deletion.

End of procedure

Alert Causes

Users record the alert cause when creating a key action report. They may select the cause from the Alert Cause drop-down list or enter a new cause. In addition, users can suggest that the entered cause be added to the drop-down list for future use. The alert causes are maintained on the Alert Causes page (Figure 48) in the Administration component.

The details of an alert cause include:

- Name—The name of the alert cause. The name must be unique and is not case sensitive. If the name is modified, it will change on existing key action reports.
- Author (display only)—The user name of the person who created the cause on the Alert Causes page or on a key action report.
- Display Order (optional)—The location of the cause in the Causes drop-down list on the Action Management page. Causes without a sequence number display in alphabetical order. The range of the display order is 30.
- Approved—The status of the cause is either approved or unapproved. When added from the Alert Causes page, the Approved check box is automatically selected. When suggested from the Action Management page, the Approved check box is unselected (unapproved).

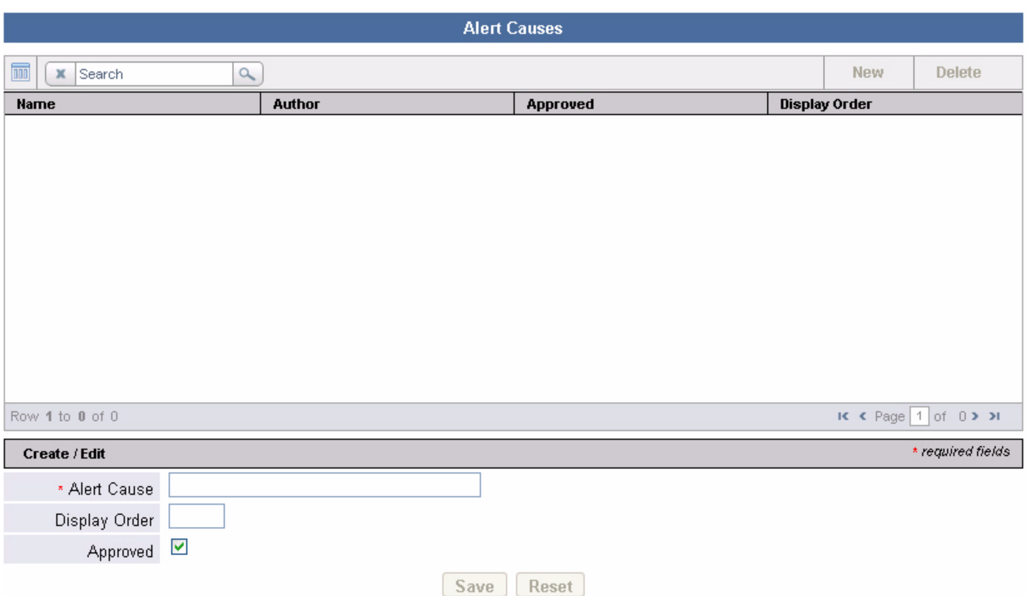

Figure 48: Alert Causes Page

From the `Alert Causes` page, you can

- Add a new alert cause to be available in the `Alert Cause` drop-down list on the `Action Management` page. Select `Alert Causes` on the navigation bar and follow “Adding a New Item” on page 122.
- Approve an alert cause, see “Approving or rejecting an alert cause” on page 95.
- Edit an alert cause. Select Alert Causes on the navigation bar and follow “Editing an item” on page 122.
- Delete one or more alert causes that are not used and not included in a key action report. Select Alert Causes on the navigation bar and follow “Deleting an Item” on page 123 or “Deleting Multiple Items” on page 124.

Procedure:
Approving or rejecting an alert cause

On the `Action Management` page, users may enter new alert causes and suggest that they are added to the drop-down list. The suggested causes display in the `Alert Causes` table on the `Administration/Alert Causes` page. The causes suggested by a user are initially unapproved.

Start of procedure

1. To add an unapproved cause to the drop-down list on the `Action Management` page:
   a. Highlight a row for an unapproved cause in the `Alert Causes` table. The details display in the details section.
   b. Select the `Approved` check box.
   c. Click `Save`.
   The approved cause displays in the table with a check mark.
2. To leave a cause off the drop-down list on the `Action Management` page:
   a. Highlight a row for an approved cause in the `Alert Causes` table. The details display in the details section.
   b. Clear the `Approved` check box.
   c. Click Save.
   The unapproved cause displays in the table with the symbol, ⊘.

End of procedure

Key Actions

Users record the key action taken to resolve the violations when creating a key action report. They may select the key action from the `Key Action` drop-down list or enter a new key action. In addition, users can suggest that the entered key action be added to the drop-down list for future use. The table of key actions is maintained on the `Key Actions` page (Figure 49 on page 97) in the Administration component.

The details of a key action include:

- `Name`—The name of the key action. The name must be unique and is not case sensitive. If the name is modified, it will change on existing key action reports.
- `Author`—The user name of the person who created the key action on the Key Actions page or on a key action report. The author is display only.
- `Metric` (optional)—The metric to which the key action applies. A key action associated to a metric is available on the `Action Management` page only if the metric matches one of the alerts for the key action report. Key actions without a defined metric are available on the `Action Management` page for all alerts.

  The metric cannot be changed if it is included in a key action report but it can always be removed. Only the metrics that can have a threshold rule display in the drop-down list. The drop-down lists the display names of the metrics within metric type.

  If the key action is suggested from the `Action Management` page, the metric defaults to unselected.
- `Metric Type`—Identifies the metric as either an application/call type or contact group metric
- `Display Order`—The location of the key action in the `Key Actions` drop-down list on the `Action Management` page. Key actions without a sequence number display in alphabetical order. The range of the display order is 30.
- `Approved`—The status of the key action is either approved or unapproved. When added from the `Key Actions` page, the `Approved` check box is automatically selected. When suggested from the `Action Management` page, the `Approved` check box is unselected (unapproved).

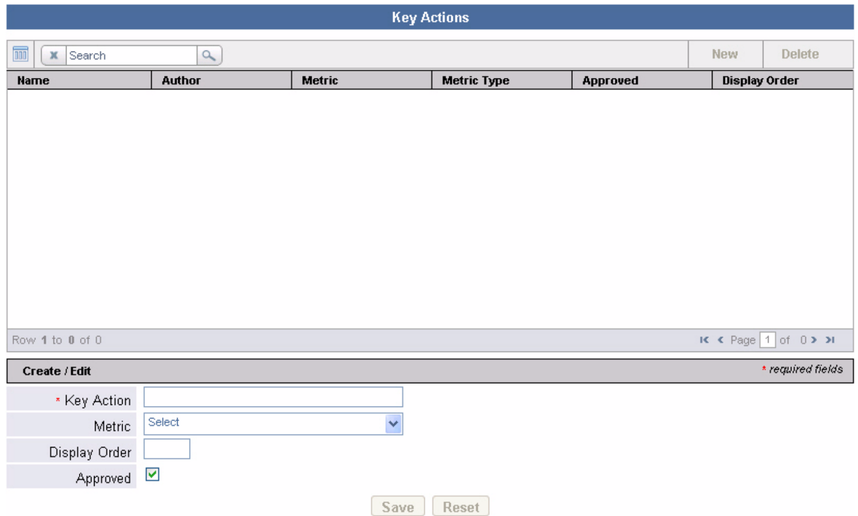

Figure 49: Key Actions Page

From the `Key Actions` page, you can:

- Add a new key action to be available in the `Key Action` drop-down list on the `Action Management` page. Select `Key Actions` on the navigation bar and follow "Adding a New Item" on page 122.
- Approve key actions, see "Approving or rejecting a key action" on page 97.
- Edit a key action. Select `Key Actions` on the navigation bar and follow "Editing an item" on page 122 or "Editing multiple items" on page 123.
- Delete one or more key actions that are not used and not included in a key action report. Select `Key Actions` on the navigation bar and follow "Deleting an Item" on page 123 or "Deleting Multiple Items" on page 124.

Procedure: Approving or rejecting a key action

On the `Action Management` page, users may enter new key actions and suggest that they are added to the drop-down list. The suggested key actions display in the `Key Actions` table on the `Administration/Key Actions` page. The key actions suggested by a user are initially unapproved.

Start of procedure

1. To add an unapproved key action to the drop-down list on the `Action Management` page:
   a. Highlight a row for an unapproved key action in the `Key Actions` table. The details display in the details section.
   b. Select the `Approved` check box.

c. Click `Save`.
   The approved key action displays in the table with a check mark.

2. To leave a key action off the list on the `Action Management` page:
   a. Highlight a row for an approved key action in the `Key Actions` table.
      The details display in the details section.
   b. Clear the `Approved` check box.
   c. Click `Save`.
      The unapproved key action displays in the table with the symbol, ⊘.

End of procedure

Chapter

3 Using Notifications

This chapter describes how to work with system-generated notifications in relation to alerts. It contains the following sections:

Notification Templates

Notification templates provide standard content for e-mails that describe the directives and actions taken from Resource Management. Notification templates are preconfigured messages that users can send to affected agents (and users) who are on notification lists. Administrators maintain notification templates from the `Administration/Notification Templates` page. Templates can also be created dynamically (while using Resource Management); however, they must be managed from the `Notification Templates` page.

Notification Templates Page

From the `Notification Templates` page, you can:

- Add a notification template. See "Adding a New Item" on page 122. If you have permission, you can create up to 50 distinct templates.
- Delete a notification template that is no longer used. See "Deleting an Item" on page 123. Note that multiselection (for deletion) is not available for Notification lists (including e-mail addresses within a notification list) or Notification templates.
- Update an existing notification template. See "Editing an item" on page 122.
- Reset the updates to a notification template before it is saved. See "Resetting the Details for an Item" on page 124.

Notification templates are composed of the name of the template and its contents.

Skills Change Statement

The skills change statement is one of the following:

- The following skills have been added: <list skill name and level>
- The level of the following skills have been changed: <list skill name and new level>
- The following skills have been removed: <list skill name>

Default E-mail Notification Templates

The default e-mail formats of the notification templates include:

Table 3: Default E-mail Notification Templates

Action	Target Object	E-mail Subject	E-mail Body
Status Change	Agent	Notification of Status Change	Your status has been changed to <new status inserted here> Additional Comments: <Insert any comments entered by the user – this is what is displayed in the message textbox>
Status Change	Supervisor	Notification of Status Change	The status of the listed agents in agent group <Insert agent group name here> has been changed to <Insert new status here>. Additional Comments <Insert any comments entered by the user— this is what is displayed in the message text box> Agents Affected <Insert list of agents from this agent group here>
Status Change	Users on Notification List	Notification of Status Change	The status of the listed agents in agent group <Insert agent group name here> has been changed to <Insert new status here>. Additional Comments <Insert any comments entered by the user— this is what is displayed in the message text box> Agents Affected <Insert list of agents from this agent group here>

Table 3: Default E-mail Notification Templates (Continued)

Action	Target Object	E-mail Subject	E-mail Body
Skill Change	Agent	Notification of Skill Change	Your skills have been changed. <Insert statement about how skills have been changed—see description after table>. Additional Comments <Insert any comments entered by the user— this is what is displayed in the message text box>
Skill Change	Supervisor	Notification of Skill Change	The skills of the listed agents in agent group <Insert agent group name here> have been changed. <Insert statement about how skills have been changed—see description after table>. Additional Comments: <Insert any comments entered by the user—this is what is displayed in the message text box> Agents Affected <Insert list of agents from this agent group here>
Skill Change	Users on Notification List	Notification of Skill Change	The skills of the included agents have been changed. <Insert statement about how skills have been changed—see description after table>. Additional Comments sent to Agent <Insert any comments entered by the user—this is what is displayed in the message text box> Additional Comments <Insert the additional comments entered for the notification lists here> Agents Affected: <Insert list of agents here>
General Notification	Agent	<title of template that is used>	Message From the Operator: <Insert any comments entered by the user—this is what is displayed in the message text box>

Notification Lists

Notification lists are used to inform groups of users within an organization about changes being made to the agents or resources. The notification lists are simply a collection of e-mail addresses. Administrators maintain the e-mail addresses from the `Notification Lists` page on the `Administration` module. These addresses are linked to the actions of Resource Management.

From the `Notification Lists` page, you can:

- View the e-mail addresses on a notification list by selecting a single row in the table. The row expands to show the e-mail addresses.
  - Delete an e-mail address. See "Deleting an e-mail address from the list" on page 103.
  - Search for an e-mail address. See "Searching for a Row with Text" on page 124.
- Add a notification list. See "Adding a notification list" on page 102.
- Delete a notification list that is no longer used. See "Deleting an Item" on page 123. Note that multiselection (for deletion) is not available for Notification lists (including e-mail addresses within a notification list) or Notification templates.
-
- Update an existing notification list. See "Editing a notification list" on page 103.
- Reset the updates to a notification list before it is saved. See "Resetting the Details for an Item" on page 124.

Procedure:
Adding a notification list

Start of procedure

1. On the navigation bar, click `Notification Lists`.

   The `Notification Lists` page displays.
2. Click `New`.

   The `Add/Edit Notification List` page displays.
3. Type a name for the notification list.
4. To add an e-mail address, type one in the `Add E-mail` field and click `Add`.
5. Click `Save`.

   The `Notification Lists` page displays.

End of procedure

Procedure:
Editing a notification list

Start of procedure

1. On the navigation bar, click `Notification Lists`.
2. Click the Edit icon next to the notification list that you want to edit.
3. The `Add/Edit Notification List` page displays. The details display in the `User's E-mail` section.
4. Update the name of the notification list.
5. To add a new e-mail address, type one in the `Add E-mail` field and click `Add`.
6. Click `Save`.

   The `Notification Lists` page displays.

End of procedure

Procedure:
Deleting an e-mail address from the list

Start of procedure

1. On the navigation bar, click `Notification Lists`.
2. Click `Delete` ( ) next to the e-mail address you want to delete.

   The following message displays: “Do you want to delete the selected item?” with `Yes/No` buttons.
3. Click `Yes`. The item is removed from the table.
   Click `No` to cancel the deletion. The confirmation dialog closes and the item remains in the table.

End of procedure

Chapter

4 Genesys Adapter

The Genesys Adapter pulls statistics from the Genesys environment for use in the Advisors suite. This chapter contains the following sections:

Overview

The Genesys Adapter configuration page is available if you have a configured Genesys data source. Typically, there is only one Genesys Adapter instance for each CCAdv instance. However, in some cases, multiple Genesys Adapters are employed to harvest information from multiple Genesys environments or to balance the load by harvesting different sets of information from the same environment.

Navigation Pane

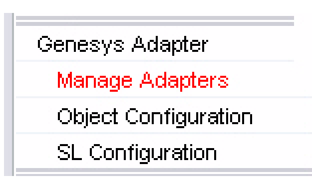

Figure 50: Navigation Pane

Three tabs in the Genesys configuration section enable you to do the following:

- Manage Genesys adapters—See “Managing Genesys Adapters” on page 106.
- Configure Genesys objects—See “Configuring Genesys Objects” on page 108.

- Configure service level thresholds per queue—See “Configuring Service-Level Thresholds Per Queue” on page 112.

Managing Genesys Adapters

The Genesys Configuration page enables you to add or delete Genesys Adapters—See Figure 51, “Genesys Configuration Page,” on page 106.

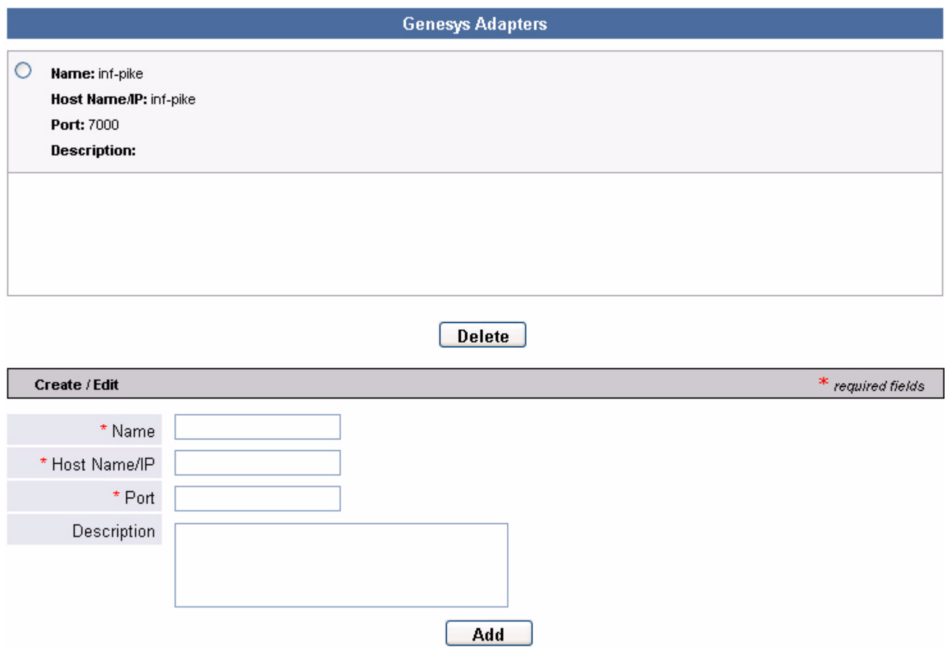

Figure 51: Genesys Configuration Page

From the list of Genesys Adapters, you can:

- Add a Genesys Adapter—See “Adding a Genesys Adapter” on page 107.
- Delete a Genesys Adapter from the list—See “Configuring Genesys Objects” on page 108.

Deleting a Genesys Adapter

You can remove a Genesys Adapter instance from the list. However, removing an instance does not remove the queue/filter and agent group/filter combinations that are stored within that Genesys Adapter. The advantage to this is that you can add a Genesys Adapter instance that was deleted from this list accidentally or that you want to add back again later.

Procedure:
Deleting a Genesys Adapter

Start of procedure

1. Select a `Genesys Adapter` from the list.
2. Click `Delete Adapter`.
   A confirmation dialog box displays to confirm the action.
3. If you click `Yes,` the Adapter is deleted. If you click `No`, the deletion is cancelled

End of procedure

Adding a Genesys Adapter

Configuring a new instance of the Genesys Adapter does not mean that a new instance of it will be installed; it is assumed that any Genesys Adapters configured on this page are already installed and running.

Procedure:
Adding a Genesys Adapter

Purpose: To configure a new Genesys Adapter for this CCAdv instance.

Start of procedure

1. On the navigation bar, click `Manage Adapters`. The list of the Genesys Adapters that contribute information to this instance of Contact Center Advisor displays.
2. Complete the details in the `Add New Adapter` section:
   - `Name` (required)—The unique name for this instance of the Genesys Adapter.
   - `Host/IP` (required)—The IP address of the server that the Genesys Adapter instance is installed on.
   - `Port` (required)—The port that the Genesys Adapter is running on.
   - `Description` (optional)—A short description of this instance of the Genesys Adapter
3. Click `Add Adapter`.
   A confirmation dialog box displays to confirm the action.

4. If you click `Yes,` the new Genesys Adapter displays in the list of existing Adapters.

   If you click `No`, the information you entered remains in the `Add New Adapter` section but the item is not saved.

End of procedure

Configuring Genesys Objects

Selecting an Adapter Instance

Before you edit any object details, you must first select the Adapter you want to work with, and confirm your selection.

Summary

You can view and maintain the agent group, queue, and filter combinations for each Genesys Adapter. Three views are available:

- Agent groups and queues associated with a filter—See "Agent Groups & Queues by Filter" on page 108
- Filters associated with an agent group—See "Filter by Agent Groups" on page 109
- Filters associated with a queue—See "Filter by Queues" on page 109

From the Genesys Configuration page, you can:

- View the combinations of agent groups, queues, and filters—See "Viewing the associations of agent groups, queues, and filters" on page 110.
- Edit the agent group, queue, and filter combinations from any view—See "Editing the Associations of Agent Groups, Queues, and Filters" on page 110
- Search each listbox—See "Searching for a Row with Text" on page 124. To clear the search, see "Displaying all Rows in a Table" on page 124.

Agent Groups & Queues by Filter

The `Agent Groups & Queues by Filter` view displays the agent groups and queues associated with a given filter (Figure 52). The filters in the configuration server for the selected Genesys Adapter display on the left. When you select a filter, the associated agent groups display on the upper right and the associated queues display on the lower right list.

NO FILTER option

It is not necessary to select filters to configure Agent Groups or Queues. For this a `NO Filter` option is available, and by selecting this option and an agent group/queue, you can select an unfiltered combination.

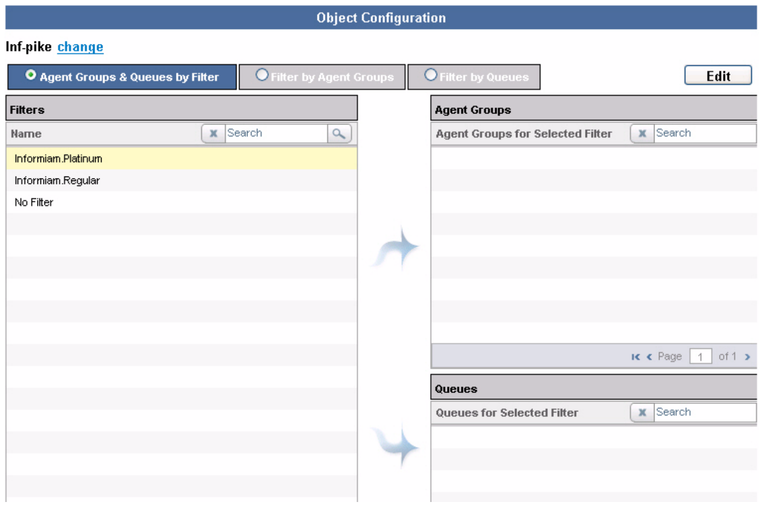

Figure 52: Agent Groups & Queues by Filter

Filter by Agent Groups

The `Filter by Agent Groups` view displays the filters associated with a given agent group. The agent groups in the configuration server for the selected Genesys Adapter display on the left. When you select an agent group, the associated filters display on the right.

Filter by Queues

The `Filter by Queues` view displays the filters associated with a given queue (Figure 53). The queues in the configuration server for the selected Genesys Adapter display on the left. When you select a queue, the associated filters display on the right.

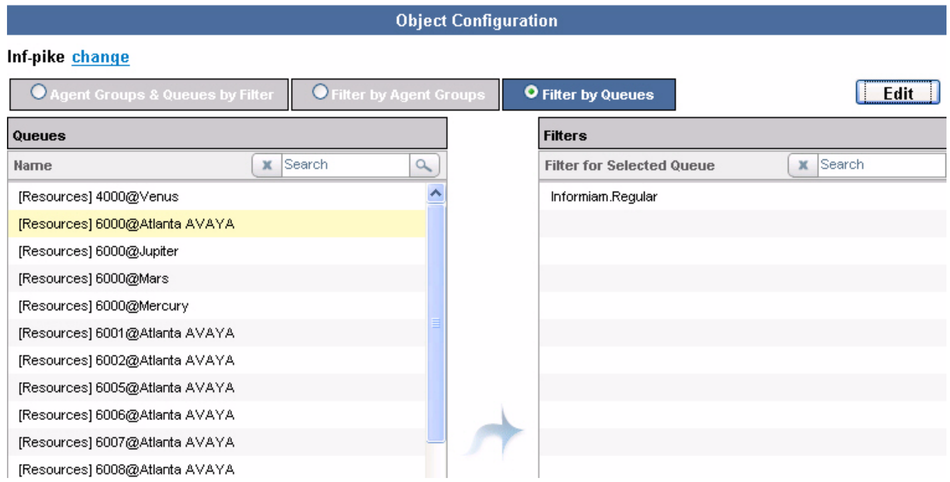

Figure 53: Filter by Queues

Procedure:
Viewing the associations of agent groups, queues, and filters

Start of procedure

1. From the list of Genesys Adapters, select a Genesys Adapter radio button.
2. Click `View & Edit Configuration`.
   The `View & Edit Genesys Configuration` page displays the current configuration. The default view is `Agent Groups & Queues by Filter`.
3. To change the view, select from one of the three radio buttons: `Agent Groups & Queues by Filter`, `Filter by Agent Groups`, or `Filter by Queues`.
   The `View Genesys Configuration page` displays the current configuration.

End of procedure

Editing the Associations of Agent Groups, Queues, and Filters

You can associate filters with agent groups and queues, or remove associations if required.

The layout of the edit pages is very similar to that of the view pages, except that in edit mode the lists on the right have two sections: one for all of the available items retrieved from the Genesys Configuration Server and the other for the selected (or associated) items (see Figure 54 on page 111). To expand one of the two sections, click the toolbar for that section. Note that only one of the sections can be expanded at a time.

You can switch between the edit views while making changes. Changes made in one view are reflected in the other views. For example, in the `Filter by Agent Groups` view, if you associate an agent group with a filter; then switch to the `Agent Groups & Queues by Filter` view, selecting that filter displays the newly associated agent group in the `Selected` section.

You edit the associations of items in the lists on the right to those items in the list on the left.

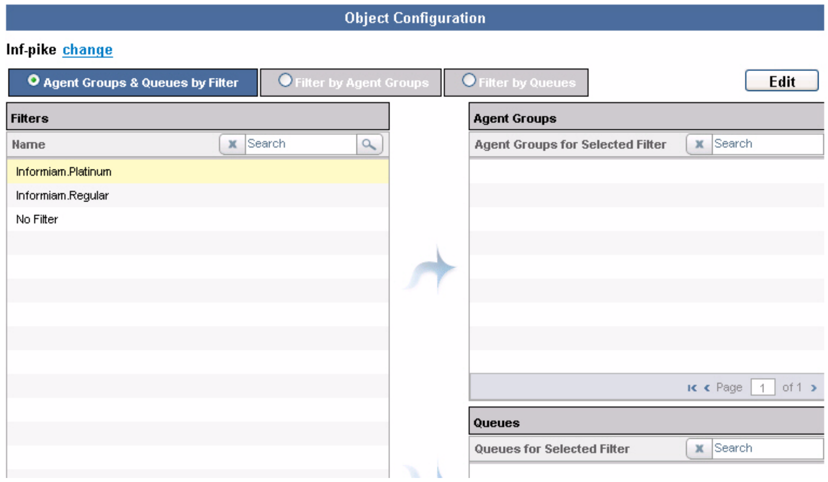

Figure 54: Agent Groups & Queues by Filters

Procedure: Editing the associations

Start of procedure

1. Select the desired view—See "Viewing the associations of agent groups, queues, and filters" on page 110.
   The `View & Edit Genesys Configuration` page displays.
2. Click `Edit`.
3. Select an item from the list on the left.
   The selected associations display in the selected section of the list on the right.
4. To add individual associations, either click the pins next to items in the `All` section of the list on the right, or, to associate all of the items to the selected filter, click the `Select All` button at the top of the list. The items display in the selected section of the list. The items display in both the `Selected` and `All` sections. A selected pin is yellow.

5. To remove individual associations, click yellow pinned items in the selected section of the list on the right. To remove all of the items from the selected filter, click the deselect all button at the top of the list. The items are removed from the selected section. The items display in the `All` section. An unselected pin is white.

> Note: The `Select All` and `Deselect All` buttons apply only to the current page of items. If there is more than one page of items, to deselect everything you must use `Deselect All` on each page. The same applies for selecting multiple pages of items.

6. To save your changes, click `Publish`. A confirmation dialog displays for you confirm that you are done with your changes and want to publish them out to the Genesys Adapter (Figure 55).

   To discard your changes, click `Cancel`. The edit page closes and the view page displays.

7. To publish your changes, click `Proceed`.
   A confirmation message displays.

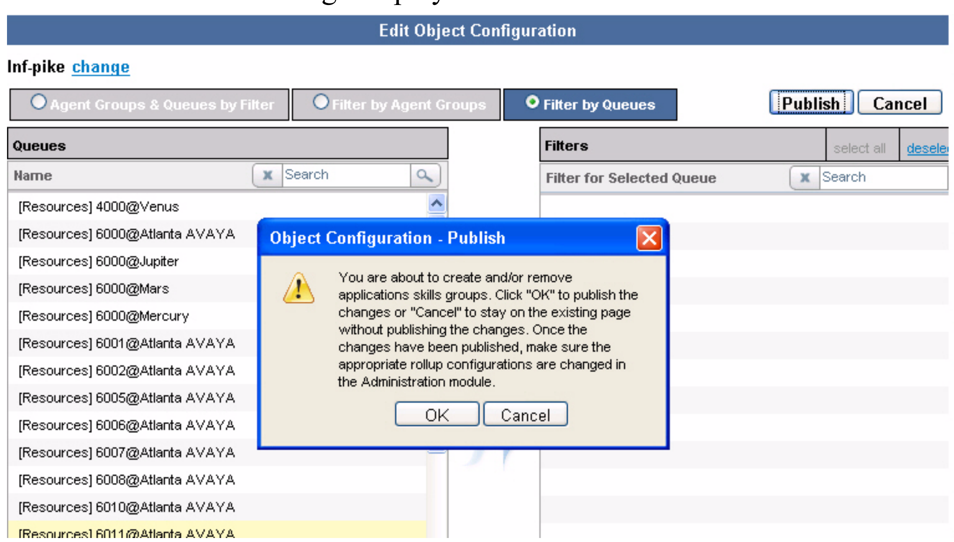

Figure 55: Publish

End of procedure

Configuring Service-Level Thresholds Per Queue

The Genesys Adapter administration module enables users to set a threshold for the service level metric on a per-queue basis. This setting is then translated to a time range for the service-level statistics associated with that queue.

Selecting an Adapter Instance Before you edit any object details, you must first select the Adapter you want to work with, and confirm your selection.

Managing Service Level Thresholds

The `All Queues` table contains a list of all the queue-filter combinations that were selected in the Objects Configuration subsection for this Adapter. This view reflects the current set of objects that the Adapter instance is monitoring.

The `Selected Queues` table is empty.

Both tables display three sortable columns:

- `Name`—The name of the queue.
- `Filter`—The name of the filter that is applied to the queue.
- `SL Time Threshold`—The threshold that is applied to all service-level metrics for this queue-filter combination. This value is in seconds.

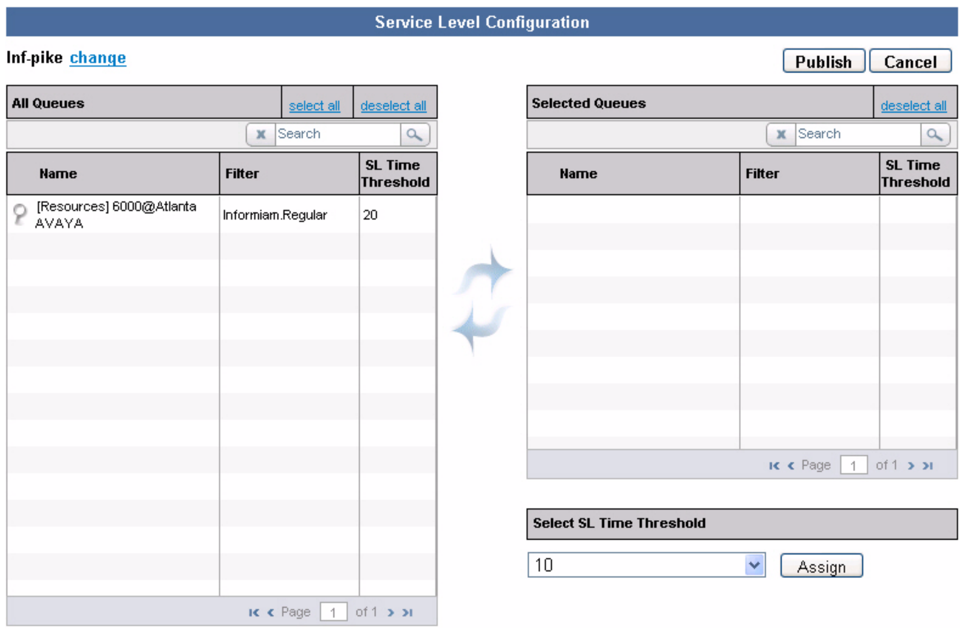

Figure 56: Service-Level Configuration

Default SL Time Threshold When a new queue-filter combination is selected for monitoring from the `Objects Configuration` subsection, the default `SL Time Threshold` is `20` seconds.

Procedure: Changing a Service-Level Threshold

Start of procedure

1. Select the queue(s) in the `All Queues` table, by using standard selection mechanisms.
2. Assign a service-level threshold to the selected queue(s) by selecting the threshold value from the drop-down list in the `Select SL Time Threshold` field and clicking `Assign`.

   The possible threshold values shown in the drop-down list come from the Genesys Adapter and are the ones that are configured on the associated Stat Server.
3. Click `Publish` to update the changes to the database, and confirm when prompted, or click `Cancel` to reset the values to the original state.

End of procedure

Chapter

5 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 57).
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 57: 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 58: 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 59).

   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.

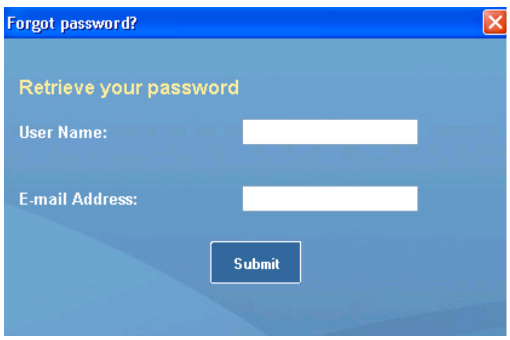

Figure 59: New Password Page

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 60).

> 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

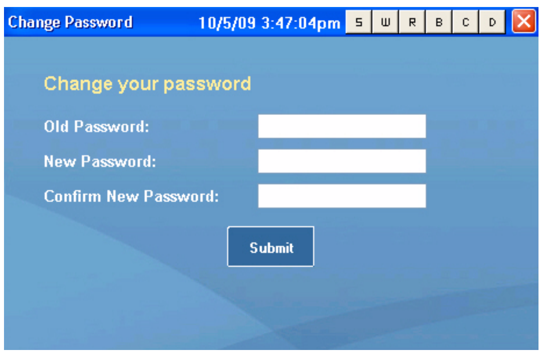

Figure 60: Change Password Page

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.

Chapter

6 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 122.
- “Editing an item” on page 122.
- “Deleting an Item” on page 123 and “Deleting Multiple Items” on page 124.
- “Resetting the Details for an Item” on page 124.
- “Searching for a Row with Text” on page 124, including
  - “Displaying all Rows in a Table” on page 124
- Display options:
  - “Sorting Rows” on page 124.
  - “Choosing which Columns Display in a Table” on page 125.
  - “Reordering Columns” on page 125.
  - “Refreshing the Data in a Table” on page 126.
  - “Increasing and Decreasing a Column Width” on page 126.
  - “Resizing the Panes” on page 126.
  - “Persisting Settings from Session to Session” on page 126.
- Additional right-click menu options—see “Righ-Click Menu Options” on page 126.

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.

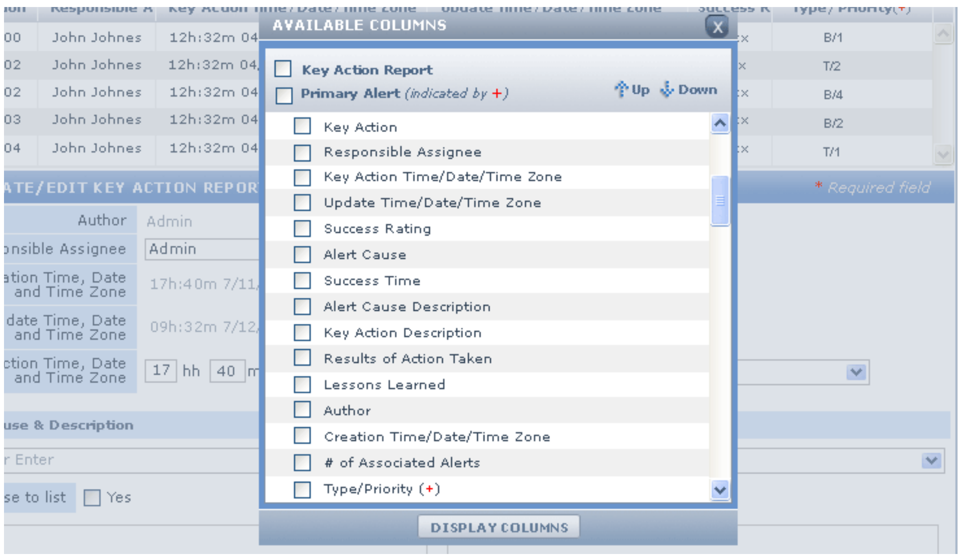

Figure 61: Available Columns

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.

Righ-Click Menu Options

Contextual menu options are available from highlighted rows by right-clicking from the mouse.

Appendix

A Contact Center Advisor Application Voice Metrics

Table 4 on page 128 lists Contact Center Advisor application voice metrics.

Table 4: Contact Center Advisor Metrics

Name	Internal Name	Description	Source Type	Definition (Formula)	Period/Time Profile	Threshold Type	Unit
Abandon	Cabn	Number of calls abandoned while in queue or ringing during the selected period.	Cisco ICM Services/Call Types, Genesys Virtual Queues, Genesys Queues	Cisco: CallsAbandQTo5 CallsAbandQHalf CallsAbandQToday Genesys: RouterCallsAbandQTo5 RouterCallsAbandQHalf RouterCallsAbandQToday	5 Min (rolling/sliding), 30 Min (since start of current half-hour), Today/Daily (since midnight)	Above	Count
Abandoned %	AbnPct	The percentage of calls to the application abandoned while in queue or ringing.	Cisco ICM Services/Call Types, Genesys Virtual Queues, Genesys Queues	Cisco Services: 100*(CallsAbandQTo5/ CallsOfferedTo5) 100*(CallsAbandQHalf/ CallsOfferedHalf) 100*(CallsAbandQToday/ CallsOfferedToday) Genesys/Cisco Call Types: 100*(RouterCallsAbandQTo5/ CallsOfferedTo5) 100*(RouterCallsAbandQHalf / CallsOfferedHalf) 100*(RouterCallsAbandQToday/ CallsOfferedToday)	5 Min (rolling/sliding), 30 Min (since start of current half-hour), Today/Daily (since midnight)	Above	Percent

Table 4: Contact Center Advisor Metrics (Continued)

Name	Internal Name	Description	Source Type	Definition (Formula)	Period/Time Profile	Threshold Type	Unit
Acc%	APCT	Accessibility % is a productivity metric that compares within an application the total calls offered to handled.	Calculated, Cisco ICM Services/Call Types, Genesys Virtual Queues, Genesys Queues	100*(CallsAnsweredTo5 / CallsOfferedTo5) 100*(CallsAnsweredHalf / CallsOfferedHalf) 100*(CallsAnsweredToday / CallsOfferedToday)	5 Min (rolling/sliding), 30 Min (since start of current half-hour), Today/Daily (since midnight)	Below	Percent
Ans	CA	Number of calls answered by agents during the selected period.	Cisco ICM Services/Call Types, Genesys Virtual Queues, Genesys Queues	CallsAnsweredTo5 CallsAnsweredHalf CallsAnsweredToday	5 Min (rolling/sliding), 30 Min (since start of current half-hour), Today/Daily (since midnight)	N/A	Count
AnsPlus Aband	CaPlsCabn	The sum of the calls answered and the calls abandoned during the selected period.	Cisco ICM Services/Call Types, Genesys Virtual Queues, Genesys Queues	Cisco Services: CallsAnsweredTo5+ CallsAbandQTo5 CallsAnsweredHalf+ CallsAbandQHalf CallsAnsweredToday+ CallsAbandQToday Genesys/Cisco Call Types: CallsAnsweredTo5+ RouterCallsAbandQTo5 CallsAnsweredHalf+ RouterCallsAbandQHalf CallsAnsweredToday+ RouterCallsAbandQToday	5 Min (rolling/sliding), 30 Min (since start of current half-hour), Today/Daily (since midnight)	Above	Count

Table 4: Contact Center Advisor Metrics (Continued)

Name	Internal Name	Description	Source Type	Definition (Formula)	Period/Time Profile	Threshold Type	Unit
Available	AA	The number of agents currently ready and waiting for a call from this application (derived from the skill groups to which it is mapped).	Cisco ICM Services/Call Types, Cisco ICM Skill Groups, Genesys Virtual Queues, Genesys Queues, Genesys Agent Groups	COUNT (DISTINCT ASGRT.AgentID) WHERE AgentState = [3 ("Ready") OR 115 ("WaitForNextCall")] WHERE AgentId from Skill Groups associated with the applications (service(s)/call type(s))	Point in Time	Above	Count
Available%	AvailPCT	The percentage of available agents over staffed.	Cisco ICM Services/Call Types, Cisco ICM Skill Groups, Genesys Virtual Queues, Genesys Queues, Genesys Agent Groups	Avail/Staffed *100	Point in Time	Above	Percent

Table 4: Contact Center Advisor Metrics (Continued)

Name	Internal Name	Description	Source Type	Definition (Formula)	Period/Time Profile	Threshold Type	Unit
Average After Call Work (AvgACW)	AvgACW	Work that is required of an agent immediately following an inbound call in seconds during the current selected period. This often includes entering data, filling out forms and making outbound calls necessary to complete the transaction. The agent is considered unavailable to receive another inbound call while in this mode.	Cisco ICM Services/Call Types, Genesys Virtual Queues, Genesys Queues	Cisco: (HandleTimeTo5 - TalkTimeTo5 - HoldTimeTo5) / CallsHandledTo5 (HandleTimeHalf - TalkTimeHalf - HoldTimeHalf) / CallsHandledHalf (HandleTimeToday - TalkTimeToday - HoldTimeToday) / CallsHandledToday Genesys: For all unique skill groups related to the application(s) in scope: ACWTimeTo5 / CallsHandledTo5 ACWTimeHalf / CallsHandledHalf ACWTimeToday / CallsHandledToday	5 Min (rolling/sliding), 30 Min (since start of current half-hour), Today/Daily (since midnight)	Above	Seconds
Average Delay (AvgDly)	AvgDL	Average delay for calls currently in queue for the application.	Cisco ICM Services/Call Types, Genesys Virtual Queues, Genesys Queues	AvgDelayQNow (ICM calculates to the end of the five-minute period.) Cisco Services: CallsQNowTime/CallsQNow at any level Genesys/Cisco Call Types: RouterCallsQNow/ RouterCallsQNowTime	Point in Time	Above	Seconds

Table 4: Contact Center Advisor Metrics (Continued)

Name	Internal Name	Description	Source Type	Definition (Formula)	Period/Time Profile	Threshold Type	Unit
Average Handle Time (AHT)	AHT	Average handle time in seconds for calls to the application during the selected period.	Cisco ICM Services/Call Types, Cisco Services, Cisco Call Types, Genesys Virtual Queues, Genesys Queues	HandleTimeTo5 / CallsHandledTo5 HandleTimeHalf / CallsHandledHalf HandleTimeToday / CallsHandledToday	5 Min (rolling/sliding), 30 Min (since start of current half-hour), Today/Daily (since midnight)	Above	Seconds
Average Speed to Answer (ASA)	ASA	Average answer wait time for calls offered to the application during the selected period.	Cisco ICM Services/Call Types, Genesys Virtual Queues, Genesys Queues	AnswerWaitTimeTo5 / CallsAnsweredTo5 AnswerWaitTimeHalf / CallsAnsweredHalf AnswerWaitTimeToday / CallsAnsweredToday	5 Min (rolling/sliding), 30 Min (since start of current half-hour), Today/Daily (since midnight)	Above	Seconds
Average Talk Time (ATT)	ATT	Average talk time in seconds for calls to the application ending during the selected period.	Cisco ICM Services/Call Types, Genesys Virtual Queues, Genesys Queues	TalkTimeTo5 / CallsHandledTo5 TalkTimeToHalf / CallsHandledHalf TalkTimeToday / CallsHandledToday	5 Min (rolling/sliding), 30 Min (since start of current half-hour), Today/Daily (since midnight)	Above	Seconds
Calls*	CIN	Number of incoming calls currently in progress. NOTE: When Genesys Queues/Virtual Queues or Cisco Call Types, this is calculated from the associated unique skill groups.	Cisco Services, Cisco Call Types, Genesys Virtual Queues, Genesys Queues	Cisco Services: CallsInNow Genesys/Cisco Call Types: For all unique skill groups related to the application(s) in scope: Sum (SGRT.TalkingIn)	Point in Time	Above	Count

Table 4: Contact Center Advisor Metrics (Continued)

Name	Internal Name	Description	Source Type	Definition (Formula)	Period/Time Profile	Threshold Type	Unit
CallsProg*	CP_C	Number of inbound and outbound calls currently being handled for the application.	Cisco ICM Services/Call Types, Genesys Virtual Queues, Genesys Queues	Cisco: CallsInProgress Genesys: For all unique skill groups related to the application(s) in scope: Sum (SGRT.TalkingIn + SGRT.TalkingOut)	Point in Time	N/A	Count
DateTime	DateTime	Central controller date and time that this data last updated. Used to calculate longest queue and longest wait time.					
ExpDelay	ED	Predicted maximum delay for any new call added to the service queue. This is valid only if no agents are available.	Cisco ICM Services/Call Types, Cisco ICM Skill Groups, Genesys Virtual Queues, Genesys Queues	Cisco Services: Max(ExpectedDelay) (ICM calculates to the end of the five-minute period.) Genesys/Cisco Call Types: (([CallsQNow]+1)*([HandleTimeTo5]/[CallsHandledTo5]))/([STF]-[NOT_READY_APP])	Point in Time	Above	Seconds
Handle Time (HT)	HT	Total handle time in seconds for calls to the application ending during the selected period.	Cisco ICM Services/Call Types, Genesys Virtual Queues, Genesys Queues	HandleTimeTo5 HandleTimeHalf HandleTimeToday	5 Min (rolling/sliding), 30 Min (since start of current half-hour), Today/Daily (since midnight)	Above	Seconds
Handled	CH	Number of calls handled during the current five minute/thirty minute/day period.	Cisco ICM Skill Groups, Genesys Virtual Queues, Genesys Queues	CallsHandledTo5 CallsHandledHalf CallsHandledToday	5 Min (rolling/sliding), 30 Min (since start of current half-hour), Today/Daily (since midnight)	N/A	Count

Table 4: Contact Center Advisor Metrics (Continued)

Name	Internal Name	Description	Source Type	Definition (Formula)	Period/Time Profile	Threshold Type	Unit
Hold/Other	Holdother	The number of agents in the Hold/Other state.	Aspect eWFM, IEX TotalView, Cisco ICM Services/Call Types, Cisco Services, Cisco Call Types, Genesys Virtual Queues, Genesys Queues	COUNT (DISTINCT ASGRT.AgentID) WHERE AgentState = [10 ("CallOnHold") OR 110 ("CallOnHold")] WHERE AgentId from Skill Groups associated with the applications (service(s)/call type(s))	Point in Time	Above	Count
LongAvail*	LAA	Time in seconds that the longest available agent for the application has been available.	Cisco ICM Services/Call Types, Genesys Virtual Queues, Genesys Queues	Cisco: Sum (DateTime – LongestAvailAgent) Genesys: For all unique skill groups related to the application(s) in scope: Max (Sum (DateTime – SGRT.LongestAvailAgent))	Point in Time	Above	Seconds
LongQueue	LCQ	Time in seconds that the longest call has been in queue for the application.	Cisco ICM Services/Call Types, Genesys Virtual Queues, Genesys Queues	Cisco Services: DateTime – LongestCallQ (ICM calculates LongestCallQ to the end of the five-minute period.) Genesys/Cisco Call Types: DateTime – RouterLongestCallQ	Point in Time	Above	Seconds

Table 4: Contact Center Advisor Metrics (Continued)

Name	Internal Name	Description	Source Type	Definition (Formula)	Period/Time Profile	Threshold Type	Unit
NotReady	NOT_ READY_ APP	Sum of agents in the Not Ready and Work Not Ready state for the application.	Cisco ICM Services/Call Types, Cisco Services, Cisco Call Types, Genesys Virtual Queues, Genesys Queues	COUNT (DISTINCT ASGRT.AgentID) WHERE AgentState = [2 ("NotReady") OR 5 ("WorkNotReady") OR 113 ("NotReadyForNextCall")] WHERE AgentId from Skill Groups associated with the applications (service(s)/call type(s))	Point in Time	Above	Count
Offer	COf	Number of incoming calls offered to the application during the selected period.	Cisco ICM Services/Call Types, Genesys Virtual Queues, Genesys Queues	CallsOfferedTo5 CallsOfferedHalf CallsOfferedToday	5 Min (rolling/sliding), 30 Min (since start of current half-hour), Today/Daily (since midnight)	N/A	Count
Outbound	COT	Number of outbound calls by agents during the selected period.	Cisco ICM Services/Call Types, Genesys Virtual Queues, Genesys Queues	CallsOutTo5 CallsOutHalf CallsOutToday	5 Min (rolling/sliding), 30 Min (since start of current half-hour), Today/Daily (since midnight)	N/A	Count

Table 4: Contact Center Advisor Metrics (Continued)

Name	Internal Name	Description	Source Type	Definition (Formula)	Period/Time Profile	Threshold Type	Unit
QDep%	QD	Queue depth is a ratio of the number of waiting calls over the number of staffed agents in the respective skill group(s).	Cisco ICM Services/Call Types, Cisco ICM Skill Groups, Genesys Virtual Queues, Genesys Queues, Genesys Agent Groups	Cisco Services: SRT.CallsQNow / ∑ mapped(SGRT.LoggedOn) SRT.CallsQNow / Count(Distinct ASGRT.AgentId) Where AgentID are IDs of agents from Agent_Skill_Group_Real_Time table (ASGRT) that are logged in to zero or more skill groups related to a service. Genesys Queues/Cisco Call Types: RouterCallsQNow / ∑ mapped(SGRT.LoggedOn) RouterCallsQNow / Count(Distinct ASGRT.AgentId)		Above	Percent
QPastSL	SLCH	Number of calls to the application currently queued for longer than the service-level threshold.	Cisco ICM Services/Call Types, Genesys Virtual Queues, Genesys Queues	ServiceLevelCallsQHeld	Point in Time	Above	Count
Queue	CQ	Number of calls in queue for the application now at the peripheral gateway.	Cisco ICM Services/Call Types, Genesys Virtual Queues, Genesys Queues	Cisco Services: CallsQNow Genesys/Cisco Call Types: RouterCallsQNow	Point in Time	N/A	Count

Table 4: Contact Center Advisor Metrics (Continued)

Name	Internal Name	Description	Source Type	Definition (Formula)	Period/Time Profile	Threshold Type	Unit
Service Level %	SL	The number of calls answered prior to the threshold divided by the number of calls that had a service-level event. This treats the abandoned calls as though they were answered after the threshold.	Cisco ICM Services/Call Types	Cisco ICM/IPCC: (ServiceLevelcallsto5 / ServiceLevelCallsOfferedTo5) * 100 Repeat for ToHalf and Today	5 Min (rolling/sliding), 30 Min (since start of current half-hour), Today/Daily (since midnight)	Below	Percent
SL% (Plus Aband)	SlPlsSlAbn	The number of calls answered prior to the threshold plus the number of calls abandoned prior to the threshold, all divided by the number of calls that had a service-level event. This treats the abandoned calls as though they were answered prior to the threshold.	Cisco ICM Services/Call Types	Cisco ICM/IPCC: ((ServiceLevelcallsto5 + ServiceLevelAbandTo5) / ServiceLevelCallsOfferedTo5) * 100 Repeat for ToHalf and Today	5 Min (rolling/sliding), 30 Min (since start of current half-hour), Today/Daily (since midnight)	Below	Percent
Staffed	Staffed	The number of agents logged on in zero or more skill groups assigned to take calls in an application.	Cisco ICM Services/Call Types, Cisco ICM Skill Groups, Genesys Virtual Queues, Genesys Queues	Count(Distinct ASGRT.AgentId) Where AgentID are IDs of agents from Agent_Skill_Group_Real_Time table (ASGRT) that are logged in to the skill groups related to a service and that are in any of the following states: 1 = Logged On 2 = Not Ready, 3 = Ready, 4 = Talking 5 = Work Not Ready 6 = Work Ready 7 = Busy Other (continued)	Point in Time	N/A	Count

Table 4: Contact Center Advisor Metrics (Continued)

Name	Internal Name	Description	Source Type	Definition (Formula)	Period/Time Profile	Threshold Type	Unit
(continued from previous page) Staffed				(continued from previous page) 8 = Reserved 9 = Unknown 10 = Call On Hold, 11 = Active 12 = Paused 14 = Not Active 103 = LoggedIn 104 = OnHook 105 = CallConsult 106 = CallDialing 107 = CallInbound 108 = CallInternal 109 = CallOutbound 110 = CallOnHold 111 = CallRinging 112 = CallUnknown 113 = NotReadyForNextCall 114 = OffHook 115 = WaitForNextCall 117 = AfterCallWork The relationship is derived from the ServiceMember table.			

Table 4: Contact Center Advisor Metrics (Continued)

Name	Internal Name	Description	Source Type	Definition (Formula)	Period/Time Profile	Threshold Type	Unit
Talking*	AT	Number of application and call type agents currently in the talking state. NOTE: The number of agents talking is not directly applicable to Genesys Queues/Virtual Queues. However, since Genesys Queues/Virtual Queues arrive to Contact Center Advisor as call types, this number will be calculated from the count of unique agent IDs in the talking state.	Cisco ICM Services/Call Types, Cisco Services, Cisco Call Types, Genesys Virtual Queues, Genesys Queues	For Services: AgentsTalking For Call Types: COUNT (DISTINCT ASGRT.AgentID) WHERE AgentState = [4 ("Talking") OR 107 ("CallInbound") OR 112 ("CallUnknown") OR 109 ("CallOutbound") OR 105 ("CallConsult") OR 108 ("CallInternal")] WHERE AgentId from Skill Groups associated with the applications (service(s)/call type(s))	Point in Time	N/A	Count
TransOut (not enhanced for Genesys)	TOC	Number of calls transferred out of the application during the selected period. NOTE: Not applicable to Genesys Queues/Virtual Queues.	Cisco Services	TransferOutCallsTo5 TransferOutCallsHalf TransferOutCallsToday	5 Min (rolling/sliding), 30 Min (since start of current half-hour), Today/Daily (since midnight)	Above	Count
Number of Active Alerts (voice, chat and e-mail)	AlertNum	The number of active application alerts for the time period in the filter.	Threshold violation alerts		5 Min (rolling/sliding), 30 Min (since start of current half-hour), Today/Daily (since midnight)	Above	Count

Table 4: Contact Center Advisor Metrics (Continued)

Name	Internal Name	Description	Source Type	Definition (Formula)	Period/Time Profile	Threshold Type	Unit
Average duration of Active Alerts (voice, chat and e-mail)	AlertAvgDur	Average duration of the active application alerts in the time period of the filter (i.e., selected period).	Threshold violation alerts	Calculate the duration from the time the alert began to the end of the time period in the filter.	5 Min (rolling/sliding), 30 Min (since start of current half-hour), Today/Daily (since midnight)	Above	Minutes
Number of Expired Alerts (voice, chat and e-mail)	AlertsExpired Num	The number of expired application alerts for the time period in the filter (i.e., selected period).	Threshold violation alerts		5 Min (rolling/sliding), 30 Min (since start of current half-hour), Today/Daily (since midnight)	Above	Count
Average duration of Expired Alerts (voice, chat and e-mail)	AlertExpired AvgDur	The average duration of the expired application alerts for the time period in the filter (i.e., selected period).	Threshold violation alerts		5 Min (rolling/sliding), 30 Min (since start of current half-hour), Today/Daily (since midnight)	Above	Minutes

* This metric is derived from skill groups and the Agent Skill Group Real Time table. It is not possible to distinguish the values per call type. In the `Applications` pane, the value for this metric will be the same for each call type that has the same skill groups assigned to them.

Appendix

B Workforce Advisor Voice Metrics

Table 5 on page 142 lists Workforce Advisor voice metrics.

Table 5: Workforce Advisor Metrics

Name	Internal Name	Description	Source Type	Definition (Formula)	Period/Time Profile	Threshold Type	Unit
Actual Abandoned	ABAND	Number of actual offered contacts abandoned.	Cisco ICM Services/Call Types, Genesys Virtual Queues, Genesys Queues	Cisco: CallsAbandQTo5 CallsAbandQHalf CallsAbandQToday Genesys: RouterCallsAbandQTo5 RouterCallsAbandQHalf RouterCallsAbandQToday	30 Min (since start of current half-hour)	N/A	Count
ACC %	ACSBLT_ WU	Accessibility % is a productivity metric that compares within an application the total calls offered to handled.	Calculated, Cisco ICM Services/Call Types, Genesys Virtual Queues, Genesys Queues	Cisco Services: 100*(CallsAbandQTo5/CallsOffe redTo5) 100*(CallsAbandQHalf/CallsOff eredHalf) 100*(CallsAbandQToday/CallsO fferedToday) Genesys/Cisco Call Types: 100*(RouterCallsAbandQTo5/Ca llsOfferedTo5) 100*(RouterCallsAbandQHalf /CallsOfferedHalf) 100*(RouterCallsAbandQToday/ CallsOfferedToday)	30 Min (since start of current half-hour)	Below	Percent
Act Pos Staffed	APS	The number of agents that actually worked.	Calculated	STFT/5	30 Min (since start of current half-hour)	N/A	Count

Table 5: Workforce Advisor Metrics (Continued)

Name	Internal Name	Description	Source Type	Definition (Formula)	Period/Time Profile	Threshold Type	Unit
Actual Abandoned %	ABANDPCT	Percentage of offered contacts that were abandoned.	Cisco ICM Services/Call Types, Genesys Virtual Queues, Genesys Queues	100*(ABAND/ANCO)	30 Min (since start of current half-hour)	Convergence	Percent
Actual AHT	AAHT	Actual average handle time for the contacts handled.	Cisco ICM Services/Call Types, Cisco Services, Cisco Call Types, Genesys Virtual Queues, Genesys Queues	HandleTimeTo5 / CallsHandledTo5 HandleTimeHalf / CallsHandledHalf HandleTimeToday / CallsHandledToday	30 Min (since start of current half-hour)	N/A	Seconds
Actual ASA	AASA	Actual average delay between the time a contact is received by the media server and the time it is answered by an agent based.	Cisco ICM Services/Call Types, Genesys Virtual Queues, Genesys Queues	Cisco: (CallsHandledHalf * AnswerWaitTimeHalf / CallsAnsweredHalf) / CallsHandledHalf Genesys: (Sum(CallsHandledHalf) * AnswerWaitTimeHalf / CallsAnsweredHalf) / Sum(CallsHandledHalf) Where Sum(CallsHandledHalf) is the sum of this metric from a unique set of Skill Groups associated with the contact group.	30 Min (since start of current half-hour)	Convergence	Seconds
Actual NCH	ANCH	Number of actual contacts handled.	Calculated, Cisco ICM Services/Call Types, Genesys Virtual Queues, Genesys Queues	CallsHandledHalf	30 Min (since start of current half-hour)	N/A	Count

Table 5: Workforce Advisor Metrics (Continued)

Name	Internal Name	Description	Source Type	Definition (Formula)	Period/Time Profile	Threshold Type	Unit
Actual NCO	ANCO	Number of actual contacts offered.	Cisco ICM Services/Call Types, Genesys Virtual Queues, Genesys Queues	Media Server Import: ICM: CallsOfferedHalf	30 Min (since start of current half-hour)	N/A	Count
Actual SL%	ASL	Actual percentage of offered contacts answered within the acceptable delay.	Cisco ICM Services/Call Types	CISCO ICM/IPCC: [(CallsOfferedHalf * ServiceLevelCallsHalf) / (ServiceLevelCallsOfferedHalf)] / CallsOfferedHalf * 100 Genesys [(CallsOfferedHalf * ServiceLevelCallsHalf) / (ServiceLevelCallsHalf + ServiceLevelCallsAbandHalf + ServiceLevelCallsOnHoldHalf)] / CallsOfferedHalf * 100	30 Min (since start of current half-hour)	Convergence	Percent
Actual Staffed Time	STFT	Total amount of available time, where available time includes talk, wrap, and ready/available.	Cisco ICM Services/Call Types, Genesys Virtual Queues, Genesys Queues	Media Server Import: ICM: Skill_Group_Real_Time.LoggedOnTimeTo5 - Skill_Group_Real_Time.NotReadyTimeTo5	30 Min (since start of current half-hour)	N/A	Minutes
AnsPlus Aband	ANSPLSABND_WU	The sum of the calls answered and calls abandoned.	Cisco ICM Services/Call Types, Genesys Virtual Queues, Genesys Queues	CallsAnsweredHalf + ABAND	30 Min (since start of current half-hour)	Above	Count

Table 5: Workforce Advisor Metrics (Continued)

Name	Internal Name	Description	Source Type	Definition (Formula)	Period/Time Profile	Threshold Type	Unit
Available	AA_WU	The number of agents currently ready and waiting for a call from this contact group (derived from the skill groups to which it is mapped).	Cisco ICM Services/Call Types, Cisco ICM Skill Groups, Genesys Virtual Queues, Genesys Queues, Genesys Agent Groups	COUNT (DISTINCT ASGRT.AgentID) WHERE AgentState = [3 ("Ready") OR 115 ("WaitForNextCall")] WHERE AgentId from Skill Groups associated with the service(s)/call type(s) associated with the contact group(s).	Point in Time	Convergence	Count
Available%	AVAILPCT_WU	The percentage of available agents divided by staffed.	Cisco ICM Services/Call Types, Cisco ICM Skill Groups, Genesys Virtual Queues, Genesys Queues, Genesys Agent Groups	Avail/Staffed *100	Point in Time	Convergence	Percent
Date	DATE		IEX TotalView, Cisco ICM Services/Call Types	IEX: CTActiveForecast.date / ICM: DateTime		N/A	
Dev from Required	REQDEV	The amount the actual staff deviated from the required staff.	Calculated	APS-REQ	30 Min (since start of current half-hour)	Convergence	Count
Dev from Sched	SCHDEV	The amount the actual staff deviated from the scheduled staff.	Calculated	APS-SCH	30 Min (since start of current half-hour)	Convergence	Count
Elapsed Fore NCO	CFNCO	Current forecast of the volume of contacts offered from the start of the current 30-minute period to now.	Aspect eWFM, IEX TotalView	FNCO / IntervalLength * IntervalElapsed	30 Min (since start of current half-hour)	N/A	Count

Table 5: Workforce Advisor Metrics (Continued)

Name	Internal Name	Description	Source Type	Definition (Formula)	Period/Time Profile	Threshold Type	Unit
Fore AHT Dev	AAHTDEV	The amount by which the actual AHT deviates from the forecast AHT.	Calculated	AAHT - FAHT	30 Min (since start of current half-hour)	Convergence	Seconds
Fore AHT Dev%	AAHTDEVPCT	The percentage by which the actual AHT deviates from the forecast AHT.	Calculated	(AAHT - FAHT) / FAHT	30 Min (since start of current half-hour)	Convergence	Percent
Fore ASA	FASA	Forecast of the average delay between the time a contact is received by the media server and the time it is answered by an agent based. This field may be blank if either the application group is a "parent" for other application groups in a multi-site configuration where the contact routing is by allocation percentages (as opposed to call-by-call routing). This field will also be blank if the staffing basis for the corresponding entity in WFM is workload.	Aspect eWFM, IEX TotalView	WFM Import: IEX: CTActiveForecast.fcstASA / eWFM: FG.RDELAY SEC (Revised Calculated Average Delay 1: Seconds) (N/A for SG)	Seconds	Convergence	
Fore NCO Dev	FNCODEV	The amount by which the actual NCO deviates from the forecast NCO.	Calculated	ANCO - CFNCO	30 Min (since start of current half-hour)	Convergence	Count
Fore NCO Dev%	FNCODEVPCT	Percentage by which the actual contacts offered deviates from the revised forecast volume.	Calculated	(ANCO-CFNCO) / CFNCO	30 Min (since start of current half-hour)	Convergence	Percent
Forecast AHT	FAHT	Current forecast of the average handle time.	Aspect eWFM, IEX TotalView	WFM Import: IEX: CTActiveForecast.fcstAHT / eWFM: FG.RAHT (Revised Forecast AHT) (N/A for SG)	30 Min (since start of current half-hour)	N/A	Seconds

Table 5: Workforce Advisor Metrics (Continued)

Name	Internal Name	Description	Source Type	Definition (Formula)	Period/Time Profile	Threshold Type	Unit
Forecast NCO	FNCO	Current forecast of the volume of contacts offered for the entire period.	Aspect eWFM, IEX TotalView	WFM Import: IEX: CTActiveForecast.fcstContactsReceived / eWFM: FG.RVOL (Revised Forecast Volume) (N/A for SG)	30 Min (since start of current half-hour)	N/A	Count
Forecast SL%	FSL	Forecast of the percentage of offered contacts answered within the acceptable delay. This field may be blank if either the application group is a “parent” for other application groups in a multi-site configuration where the contact routing is by allocation percentages (as opposed to call-by-call routing). This field will also be blank if the staffing basis for the corresponding entity in WFM is workload.	Aspect eWFM, IEX TotalView	WFM Import: IEX: CTActiveForecast.fcstSLPct / eWFM: FG.RSL (N/A for SG) (Revised Calculated Service Level Percent 2)	30 Min (since start of current half-hour)	Convergence	Percent
Hold/Other	HOLD OTHER_WU	The number of agents in the Hold/Other state.	Aspect eWFM, IEX TotalView, Cisco ICM Services/Call Types, Cisco Services, Cisco Call Types, Genesys Virtual Queues, Genesys Queues	COUNT (DISTINCT ASGRT.AgentID) WHERE AgentState = [10 ("CallOnHold") OR 110 ("CallOnHold")] WHERE AgentId from Skill Groups associated with the contact groups.	Point in Time	Convergence	Count
Identifier	ID	Identifier of the entities in the source system that is associate with the application group.	IEX TotalView, Cisco ICM Services/Call Types	IEX: CTActiveForecast.custId + CTActiveForecast.ctId / ICM: CallTypeID or SkillTargetID		N/A	

Table 5: Workforce Advisor Metrics (Continued)

Name	Internal Name	Description	Source Type	Definition (Formula)	Period/Time Profile	Threshold Type	Unit
Interval	INTVL	Start time of the period.	IEX TotalView, Cisco ICM Services/Call Types	IEX: CTActiveForecast.period / ICM: DateTime		N/A	
Net Staff	NET	The number of scheduled staff over or under the number of staff required (including unproductive).	Calculated	SCH-REQ	30 Min (since start of current half-hour)	Convergence	Count
NotReady	NOTREADY_WU	Sum of agents in the Not Ready and Work Not Ready state for the application associated to the contact group.	Cisco ICM Services/Call Types Cisco Services Cisco Call Types Genesys Virtual Queues	(DISTINCT ASGRT.AgentID) WHERE AgentState = [2 ("NotReady") OR 5 ("WorkNotReady") OR 113 ("NotReadyForNextCall")] WHERE AgentId from Skill Groups associated with the applications (service(s)/call type(s))	Point in Time	Convergence	Count
Required Adherence (APS)	REQDEV PCT	The amount the actual staff deviated from the required staff as a percentage.	Calculated	APS/REQ*100	30 Min (since start of current half-hour)	Convergence	Percent
Required Adherence (Staffed)	REQADH_WU	The amount the staff deviated from the required staff as a percentage.	Calculated	STF_WU/REQ*100	30 Min (since start of current half-hour)	Convergence	Percent
Required Staff	REQ	The number of staff required to handle the forecast workload based on the current forecast.	Aspect eWFM, IEX TotalView	WFM Import: IEX: CTActiveForecast.fcstReq / eWFM: FG.FGRREQ (Forecast Group's Revised Required without Unproductive) or SG.SGRREQ (Staff Group's Revised Required without Staff Adjustments and Unproductive)	30 Min (since start of current half-hour)	N/A	Count

Table 5: Workforce Advisor Metrics (Continued)

Name	Internal Name	Description	Source Type	Definition (Formula)	Period/Time Profile	Threshold Type	Unit
Scheduled Adherence (APS)	SCHDEV PCT	The amount the actual staff deviated from the scheduled staff as a percentage.	Calculated	APS/SCH*100		Convergence	Percent
Scheduled Adherence (Staffed)	SCHADH_ WU	The amount the staff deviated from the scheduled staff as a percentage.	Calculated	STF_WU/SCH*100		Convergence	Percent
Scheduled Staff	SCH	Tally of agents scheduled to work in this business group.	Aspect eWFM, IEX TotalView	WFM Import: IEX: CTActiveForecast.schedOpen / eWFM: FG.RSCH (Forecast Group's Revised Scheduled without Staff Adjustments and Unproductive) or SG.SGRSCH (Staff Group's Revised Scheduled without Staff Adjustments)	30 Min (since start of current half-hour)	N/A	Count
SL(Plus Aband)%	SLPLSLS ABN_WU	The number of calls answered prior to the threshold plus the number of calls abandoned prior to the threshold, all divided by the number of calls that had a service-level event. This treats these abandoned calls as though they were answered prior to the threshold.	Cisco ICM Services/Call Types	[sum(ServiceLevelCallsHalf) + sum(ServiceLevelAbandHalf)] / sum(ServiceLevelCallsOfferedHalf) * 100%	30 Min (since start of current half-hour)	Convergence	Percent

Table 5: Workforce Advisor Metrics (Continued)

Name	Internal Name	Description	Source Type	Definition (Formula)	Period/Time Profile	Threshold Type	Unit
Staffed (continued on next page)	STF_WU	The number of agents logged on in zero or more skill groups assigned to take calls in the application(s) associated to the contact group. Expanded to account for the agent states from Genesys.	Cisco ICM Services/Call Types, Genesys Virtual Queues, Genesys Queues, Genesys Agent Groups	COUNT (DISTINCT ASGRT.AgentID) WHERE AgentId from Skill Groups associated with the service(s)/call type(s) associated with the contact group(s) WHERE AgentState INLIST 1 = Logged On 2 = Not Ready 3 = Ready 4 = Talking 5 = Work Not Ready 6 = Work Ready 7 = Busy Other 8 = Reserved 9 = Unknown 10 = Call On Hold 11 = Active 12 = Paused 14 = Not Active 103 = LoggedIn 104 = OnHook 105 = CallConsult 106 = CallDialing 107 = CallInbound 108 = CallInternal 109 = CallOutbound (continued on next page)	Point in Time	N/A	Count

Table 5: Workforce Advisor Metrics (Continued)

Name	Internal Name	Description	Source Type	Definition (Formula)	Period/Time Profile	Threshold Type	Unit
(continued from previous page) Staffed				(continued from previous page) 110 = CallOnHold 111 = CallRinging 112 = CallUnknown 113 = NotReadyForNextCall 114 = OffHook 115 = WaitForNextCall 117 = AfterCallWork The relationship is derived from the ServiceMember table.			
Time zone	TZ	Time zone of the start time of the period.	IEX TotalView, Cisco ICM Services/Call Types, Genesys Virtual Queues, Genesys Queues	IEX: CTActiveForecast.TZ / ICM: DateTime		N/A	
Number of Active Alerts	AlertNum	The number of active contact group alerts for the time period in the filter.	Threshold violation alerts		30 Min (since start of current half-hour)	Above	Count
Average duration of Active Alerts	AlertAvgDur	Average duration of the active contact group alerts in the time period of the filter (i.e., selected period).	Threshold violation alerts	Calculate the duration from the time the alert began to the end of the time period in the filter.	30 Min (since start of current half-hour)	Above	Minutes
Number of Expired Alerts	AlertsExpired Num	The number of expired contact group alerts for the time period in the filter (i.e., selected period).	Threshold violation alerts		30 Min (since start of current half-hour)	N/A	Count
Average duration of Expired Alerts	AlertExpired AvgDur	The average duration of the expired contact group alerts for the time period in the filter (i.e., selected period).	Threshold violation alerts		30 Min (since start of current half-hour)	Above	Minutes

Appendix

C Skill Group Voice Metrics

Table 6 lists Skill Group voice metrics.

Table 6: Skill Group Metrics

Name	Internal Name	Description	Source Type	Definition (Formula)	Interval/Time Profile	Unit	Totals and Averages
AHT	S_AHT	Average handle time in seconds for calls counted as handled by the skill group during the current five-minute interval. ICM calculation of HandledCallsTimeTo5 divided by CallsHandledTo5.	Aspect eWFM, Cisco ICM Skill Groups, Genesys Agent Groups	AvgHandledCallsTimeTo5	5 Min (rolling/sliding)	Seconds	AvgHandledCallsTimeTo5/number of skill groups average weighted by CallsHandledTo5, i.e.sum(AvgHandledCallsTimeTo5 * CallsHandledTo5) / sum(CallsHandledTo5)"
ASA	S_ASA	Average answer wait time for all calls offered to the skill group during the current five-minute interval.	Cisco ICM Skill Groups, Genesys Agent Groups	AnswerWaitTimeTo5/ CallsAnsweredTo5	5 Min (rolling/sliding)	Seconds	sum(AnswerWaitTimeTo5) / sum(CallsAnsweredTo5)
Available	Av	The number of agents currently in the Available state.	Cisco ICM Skill Groups, Genesys Agent Groups	Avail	Point in Time	Count	COUNT (DISTINCT ASGRT.AgentID) WHERE AgentState = [3 (""Ready"") OR 115 (""WaitForNextCall"")] WHERE AgentId from skill groups associated with the applications (service(s)/call type(s))"

Table 6: Skill Group Metrics (Continued)

Name	Internal Name	Description	Source Type	Definition (Formula)	Interval/Time Profile	Unit	Totals and Averages
AvgACW	AvgACW_S	Work that is required of an agent immediately following an inbound call in seconds. This often includes entering data, filling out forms and making outbound calls necessary to complete the transaction. The agent is considered unavailable to receive another inbound call while in this mode.	Cisco ICM Skill Groups, Genesys Agent Groups	Cisco Sum(SGRT.WorkReadyTimeTo5 + SGRTWorkNotReadyTimeTo5) / SGRT.CallsHandledTo5 Genesys SGRT.WorkReadyTimeTo5 / SGRT.CallsHandledTo5	5 Min (rolling/sliding)	Seconds	Cisco Sum(SGRT.WorkReadyTimeTo5 + SGRTWorkNotReadyTimeTo5) / SGRT.CallsHandledTo5 Genesys SGRT.WorkReadyTimeTo5 / SGRT.CallsHandledTo5"
AvgTalk	AvtT	Average talk time in seconds for calls counted as handled by the skill group during the current five-minute interval. ICM calculation of HandledCallsTalkTimeTo5 divided by CallHandledTo5.	Cisco ICM Skill Groups, Genesys Agent Groups	AvgHandledCallsTalkTimeTo5	5 Min (rolling/sliding)	Seconds	average weighted by CallsHandledTo5, i.e., sum(AvgHandledCallsTalkTimeTo5 * CallsHandledTo5) / sum(CallsHandledTo5)"

Table 6: Skill Group Metrics (Continued)

Name	Internal Name	Description	Source Type	Definition (Formula)	Interval/Time Profile	Unit	Totals and Averages
BusyOther	BO	Number of agents currently busy on other skill groups with respect to this skill group.	Aspect eWFM, Cisco ICM Skill Groups, Genesys Agent Groups	BusyOther For Agent Real Time data, this state must be assigned to each agent/skill group record once any other skill group agent state changes to the one of the following: Genesy: 105="CallConsult" 106="CallDialing" 107="CallInbound" 108="CallInternal" 109="CallOutbound" 110="CallOnHold" 111="CallRinging" 112="CallUnknown" 114="OffHook" 117="AfterCallWork"	Point in Time	Count	COUNT (DISTINCT ASGRT.AgentID) WHERE AgentState = [7 (""BusyOhter"")] WHERE AgentId from skill groups associated with the applications (service(s)/call type(s))"
Calls Offered	O	The number of calls offered during the current five-minute interval.	Cisco ICM Skill Groups, Genesys Agent Groups	CallsOfferedTo5	5 Min (rolling/sliding)	Count	sum(CallsOfferedTo5)
DateTime	DateTime	Central controller date and time that this data last updated. Used to calculate longest queue and longest wait time					
Handled	Ha	Number of calls handled during the current five-minute interval.	Cisco ICM Skill Groups, Genesys Agent Groups	CallsHandledTo5	5 Min (rolling/sliding)	Count	sum(CallsHandledTo5)

Table 6: Skill Group Metrics (Continued)

Name	Internal Name	Description	Source Type	Definition (Formula)	Interval/Time Profile	Unit	Totals and Averages
Hold	H	The number of agents that have all active calls on hold. The agent is not in the Hold state with one call on hold and talking on another call (for example, a consultative call). The agent must have all active calls on hold.	Cisco ICM Skill Groups, Genesys Agent Groups	Hold	Point in Time	Count	COUNT (DISTINCT ASGRT.AgentID) WHERE AgentState = [10 (""CallOnHold"") OR 110 (""CallOnHold"")] WHERE AgentId from skill groups associated with the applications (service(s)/call type(s))
LoggedIn	LO	Number of agents that are currently logged on in zero or more skill groups assigned to take calls in an application. This count is updated each time an agent logs on and each time an agent logs off.	Cisco ICM Skill Groups, Genesys Agent Groups	COUNT (DISTINCT ASGRT.AgentID) WHERE AgentId from Skill Groups associated with the applications (service(s)/call type(s)) Genesys: LoggedOn	Point in Time	Count	COUNT (DISTINCT ASGRT.AgentID) WHERE AgentId from Skill Groups associated with the applications (service(s)/call type(s))
LongAvail	LA	Time that the longest available agent for this skill group has been available.	Cisco ICM Skill Groups, Genesys Agent Groups	max((DateTime -LongestAvailAgent) * 24 * 60 * 60)	Point in Time	Seconds	max((DateTime -LongestAvailAgent) * 24 * 60 * 60)
LongQueue (not enhanced for Genesys)	LQ	Time that the longest call has been in queue for this skill group.	Cisco ICM Skill Groups	max((DateTime - LongestCallQ) * 24 * 60 * 60) at any level	Point in Time	Seconds	"max((DateTime - LongestCallQ) * 24 * 60 * 60) at any level"

Table 6: Skill Group Metrics (Continued)

Name	Internal Name	Description	Source Type	Definition (Formula)	Interval/Time Profile	Unit	Totals and Averages
NotReady	NR	Number of agents in the Not Ready or Work Not Ready state for the skill group.	Cisco ICM Skill Groups, Genesys Agent Groups	Cisco SGRT.NotReady + SGRT.WorkNotReady Genesys SGRT.NotReady	Point in Time	Count	COUNT (DISTINCT ASGRT.AgentID) WHERE AgentState = [2 (""NotReady"") OR 5 (""WorkNotReady"") OR 113 (""NotReadyForNextCall"")] WHERE AgentId from skill groups associated with the applications (service(s)/call type(s))
Queue (not enhanced for Genesys)	Q	Number of calls currently queued to the skill group.	Cisco ICM Skill Groups	CallsQueuedNow		Count	sum(QueueSGa + QueueSGb +… QueueSGn)
Ready	R	Number of agents in the Ready state for the skill group	Cisco ICM Skill Groups, Genesys Agent Groups	Ready		Count	COUNT (DISTINCT ASGRT.AgentID) WHERE AgentState != [2 (""NotReady"")] AND AgentState !=[5 (""WorkNotReady"")] AND AgentState !=[0 ('LoggedOff')] AND AgentState != [113 (""NotReadyForNextCall"")] AND AgentState !=[101 ('NotMonitored')] AND AgentState !=[102(' Monitored')] WHERE AgentId from skill groups associated with the applications (service(s)/call type(s))

Table 6: Skill Group Metrics (Continued)

Name	Internal Name	Description	Source Type	Definition (Formula)	Interval/Time Profile	Unit	Totals and Averages
TalkIn	TI	Number of agents in the skill group currently talking on inbound calls.	Cisco ICM Skill Groups, Genesys Agent Groups	TalkingIn			sum(TalkInSGa + TalkInSGb +… TalkInSGn)
Talking	T	The number of calls currently associated with this skill group.	Cisco ICM Skill Groups, Genesys Agent Groups	Cisco TalkingIn + TalkingOut + TalkingOther + TalkingPreview + TalkingReserve + TalkingAutoOut Genesys TalkingIn + TalkingOut + TalkingOther			sum(TalkingSGa + TalkingSGb +… TalkingSGn)
TalkOut	TIkO	Number of agents in the skill group currently talking on outbound calls.	Cisco ICM Skill Groups, Genesys Agent Groups	TalkingOut			sum(TalkOutSGa + TalkOutSGb +… TalkOutSGn)
Util%	U	Percentage of Ready time that agents in the skill group spent talking or doing call work during the current five-minute interval. This is the percentage of time agents spend working on calls versus the time agents were ready.	Cisco ICM Skill Groups, Genesys Agent Groups	Cisco: PercentUtilizationTo5*100 % Genesys: PercentUtilizationTo5	5 Min (rolling/sliding)	Percent	Weighted Avg by NCH

Table 6: Skill Group Metrics (Continued)

Name	Internal Name	Description	Source Type	Definition (Formula)	Interval/Time Profile	Unit	Totals and Averages
Wrap	W	Number of agents in the skill group in the Work Ready and Work Not Ready states.	Cisco ICM Skill Groups, Genesys Agent Groups	Cisco WorkReady + WorkNotReady Genesys WorkReady	5 Min (rolling/sliding)	Count	Sum(WrapSGa + WrapSGb +… WrapSGn)

Appendix

D Alert Metrics

Table 7 on page 162 lists alert metrics.

Table 7: Alert Metrics

Name	Internal Name	Description	Source Type
Action Taken	AlertActionTaken		
Business Priority 1 Alerts	AlertB1		
Business Priority 2 Alerts	AlertB2		
Cause	AlertCause		
Duration	ViolationDuration	If the alert is inactive, use the start time minus the real end time. If the alert is active, use the start time minus the current time. The format is `hh:mm:ss`.	Calculated
End Date	AlertEndDate	The date when the alert expired.	
End Time	AlertEndTime	The time when the alert expired.	
Max Violation		The highest or lowest value of the violation	Calculated
Start Date	AlertStartDate	• For an alert, the start date is when the alert actually started, even if that's before the time period in the user's filter. • For a key action report, display the Key Action Date from the `Action Management` page.	

Table 7: Alert Metrics (Continued)

Name	Internal Name	Description	Source Type
Start Time	AlertStartTime	• From the carousel; the time when the alert was triggered (`hh:mm:ss`) • For a key action report, display the Key Action Time from the `Action Management` page.	
Success Rating	AlertSuccessRating	The value from the Success Rating drop-down list on the `Alert Management` page. `(3, 2, 1, 0, -1, -2, or -3)` If multiple key actions exist show the highest success rating of all of the key actions.	
Success Time	AlertSuccessTime	The violation end time and date minus the key action start time and date, where the key action has a success rating greater than `0` (equal to `1` or `2`). The format is `hh:mm:ss`.	Calculated
Technical Priority 1 Alerts	AlertT1	An alert row displays `T1` or dashes.	
Technical Priority 2 Alerts	AlertT2	An alert row displays `T2` or dashes.	
Threshold		This column displays the acceptable value used to calculate the max violation. In WA, the acceptable value is a range so use the closest acceptable value. For example, if the acceptable range is `20-30` and the max violation is `40`, display `30`.	

Table 7: Alert Metrics (Continued)

Name	Internal Name	Description	Source Type
Value at Max Violation		The worst metric value used to calculate the max violation.	

Appendix

E Stat Server Metrics

Table 8 lists Stat Server metrics.

Table 8: Stat Server Metrics

Metric ID	Stat Server Metric Name	Definition	Conversion Type
1	Informiam.AverHandleStatus Time	Category=AverageTime	None
		MainMask=CallInbound, CallOutbound, AfterCallWork	
		Objects=Agent, Place, GroupAgents, GroupPlaces	
		RelMask=CallInbound, CallOutbound	
		Subject=AgentStatus	
2	Informiam.AverTalkStatusTime	Category=AverageTime	None
		MainMask=CallInbound, CallOutbound	
		Objects=Agent, Place, GroupAgents, GroupPlaces	
		RelMask=CallInbound, CallOutbound	
		Subject=AgentStatus	
3	Informiam.CallsAnswered	Category=TotalNumber	None
		MainMask= CallAnsweredInbound, CallAnsweredUnknown	
		Objects=Agent, Place, GroupAgents, GroupPlaces	
		Subject=DNAction	

Table 8: Stat Server Metrics (Continued)

Metric ID	Stat Server Metric Name	Definition	Conversion Type
4	Informiam.CallsOffered	Category=TotalNumber	None
		MainMask=CallAnsweredInbound, CallAnsweredUnknown, CallAbandonedFromRingingInbound, CallAbandonedFromRingingUnknown	
		Objects=Agent, Place, GroupAgents, GroupPlaces	
		Subject=DNAction	
5	Informiam.CurrAgentsLoggedIn	Category=CurrentNumber	None
		MainMask=*, ~LoggedOut, ~NotMonitored	
		Objects=GroupAgents, GroupPlaces	
		Subject=AgentStatus	
6	Informiam.Current_Calls_ Inbound	Category=CurrentNumber	None
		Description=Current number of inbound calls being handled.	
		MainMask=CallInbound	
		Objects=Agent, GroupAgents, GroupPlaces, Place	
		Subject=AgentStatus	

Table 8: Stat Server Metrics (Continued)

Metric ID	Stat Server Metric Name	Definition	Conversion Type
7	Informiam.Current_Calls_Other	Category=CurrentNumber	None
		MainMask=CallUnknown, CallInternal, CallConsult	
		Objects=GroupAgents, GroupPlaces	
		Subject=DNAction	
8	Informiam.Current_Calls_ Outbound	Category=CurrentNumber	None
		Description=Current number of outbound calls being handled.	
		MainMask=CallOutbound	
		Objects=Agent, GroupAgents, GroupPlaces, Place	
		Subject=AgentStatus	

Table 8: Stat Server Metrics (Continued)

Metric ID	Stat Server Metric Name	Definition	Conversion Type
9	Informiam.CurrentAgentState	Category=CurrentState	agentStateMapping
		MainMask=*	
		Objects=Agent	
		Subject=AgentStatus	
10	Informiam.CurrentReadyAgents	Category=CurrentNumber	None
		MainMask=*, ~NotReadyForNextCall, ~LoggedOut, ~NotMonitored	
		Objects=GroupAgents, GroupPlaces	
		Subject=AgentStatus	
11	Informiam.CurrMaxCallWaiting Time	Category=CurrentMaxTime	None
		MainMask=CallWait	
		Objects=Queue, RoutePoint, GroupQueues	
		Subject=DNAction	

Table 8: Stat Server Metrics (Continued)

Metric ID	Stat Server Metric Name	Definition	Conversion Type
12	Informiam.CurrNumberACW Statuses	Category=CurrentNumber	None
		MainMask=AfterCallWork	
		Objects=GroupAgents, GroupPlaces	
		Subject=AgentStatus	
13	Informiam.CurrNumberHold Statuses	Category=CurrentNumber	None
		MainMask=CallOnHold	
		Objects=GroupAgents, GroupPlaces	
		Subject=AgentStatus	
14	Informiam.CurrNumberNotReady Statuses	Category=CurrentNumber	None
		MainMask=NotReadyForNextCall	
		Objects=GroupAgents, GroupPlaces	
		Subject=AgentStatus	
15	Informiam.CurrNumberReady Statuses	Category=CurrentNumber	None
		MainMask=WaitForNextCall	
		Objects=GroupAgents, GroupPlaces	
		Subject=AgentStatus	

Table 8: Stat Server Metrics (Continued)

Metric ID	Stat Server Metric Name	Definition	Conversion Type
16	Informiam.CurrNumberWaiting Calls	Category=CurrentNumber	None
		Description=Current Number of Calls waiting in Queue	
		Formula=DCID	
		MainMask=CallWait	
		Objects=Queue, RoutePoint, GroupQueues	
		Subject=DNAction	
17	Informiam.CurrTotalLoginTime	Category=CurrentContinuousTime	None
		MainMask=*, ~LoggedOut	
		Objects=Agent	
		Subject=AgentStatus	
18	Informiam.Interactions_Processed	Category=TotalNumber	None
		MainMask=InteractionHandling	
		Objects=Agent, Place, GroupAgents, GroupPlaces	
		Subject=Action	

Table 8: Stat Server Metrics (Continued)

Metric ID	Stat Server Metric Name	Definition	Conversion Type
109	Informiam.Login_Timestamp	Category=CurrentContinuousTime	timestamp
		MainMask=*, ~LoggedOut	
		Objects=Agent	
		Subject=AgentStatus	
105	Informiam.Longest_ACWCall	Category=MaxTime	None
		MainMask=AfterCallWork	
		Objects=Agent	
		Subject=DNAction	
19	Informiam.LongestAvailAgent	Category=CurrentMaxTime	None
		MainMask=WaitForNextCall	
		Objects=GroupAgents	
		Subject=AgentStatus	
102	Informiam.Longest_Call	Category=MaxTime	None
		MainMask=CallInbound, CallUnknown	
		Objects=Agent	
		Subject=DNAction	

Table 8: Stat Server Metrics (Continued)

Metric ID	Stat Server Metric Name	Definition	Conversion Type
107	Informiam.Reason_Code	Category= CurrentStateReasons	None
		MainMask=*	
		Objects=Agent	
		Subject=DNAction	
20	Informiam.ServiceLevelAband	Category=TotalNumberInTimeRange	None
		MainMask=CallAbandoned	
		Objects=Queue, RoutePoint, GroupQueues	
		Subject=DNAction	
21	Informiam.ServiceLevel Answered	Category=TotalNumberInTimeRange	None
		MainMask=CallAnswered	
		Objects=Queue, RoutePoint, GroupQueues	
		Subject=DNAction	

Table 8: Stat Server Metrics (Continued)

Metric ID	Stat Server Metric Name	Definition	Conversion Type
22	Informiam.ServiceLevelCallsOnHold_Current	Category=CurrentNumberInTimeRange	None
		MainMask=CallWait	
		Objects=Queue, RoutePoint, GroupQueues	
		Subject=DNAction	
23	Informiam.ServiceLevelCallsOnHold_Total	Category=TotalNumberInTimeRange	None
		MainMask=CallWait	
		Objects=Queue, RoutePoint, GroupQueues	
		Subject=DNAction	
100	Informiam.Time_CurrState	Category=CurrentTime	None
		MainMask=*	
		Objects=Agent	
		Subject=AgentStatus	

Table 8: Stat Server Metrics (Continued)

Metric ID	Stat Server Metric Name	Definition	Conversion Type
106	Informiam.Total_ACW_Calls_in TRange	Category=TotalNumberInTimeRange	None
		MainMask=AfterCallWork	
		Objects=Agent	
		Subject=DNAction	
112	Informiam.Interactions_Processed _inTRange	Category=TotalNumberInTimeRange	None
		MainMask=CallInbound	
		Objects=Agent	
		Subject=Action	
24	Informiam.Total_ACW_Time	Category=TotalTime	None
		MainMask=AfterCallWork	
		Objects=Agent, Place, GroupAgents, GroupPlaces	
		Subject=DNAction	

Table 8: Stat Server Metrics (Continued)

Metric ID	Stat Server Metric Name	Definition	Conversion Type
25	Informiam.Total_Calls_ Abandoned	Category=TotalNumber	None
		Description=Total number of new calls abandoned	
		MainMask=CallAbandonedFromRingingInbound, CallAbandonedFromRingingUnknown, CallAbandonedInbound, CallAbandonedUnknown	
		Objects=GroupQueues, Queue, RoutePoint	
		Subject=DNAction	
26	Informiam.Total_Calls_Answered	Category=TotalNumber	None
		Description=Total number of new calls answered	
		Formula=DCID	
		MainMask=CallAnsweredInbound, CallAnsweredUnknown	
		Objects=GroupQueues, Queue, RoutePoint	
		Subject=DNAction	

Table 8: Stat Server Metrics (Continued)

Metric ID	Stat Server Metric Name	Definition	Conversion Type
27	Informiam.Total_Calls_Inbound	Category=TotalNumber	None
		Description=Total number of new calls distributed	
		Formula=DCID	
		MainMask=CallEnteredInbound, CallEnteredUnknown	
		Objects=GroupQueues, Queue, RoutePoint	
		Subject=DNAction	
108	Informiam.Total_Calls_On_Hold	Category=TotalNumber	None
		MainMask=CallOnHold	
		Objects=Agent, Place, GroupAgents, GroupPlaces	
		Subject=DNAction	
101	Informiam.Total_Calls_ Transferred	Category=TotalNumber	None
		MainMask=CallTransferMade	
		Objects=Agent	
		Subject=Action	

Table 8: Stat Server Metrics (Continued)

Metric ID	Stat Server Metric Name	Definition	Conversion Type
104	Informiam.Total_Handle_Time	Category=TotalTime	None
		MainMask= CallInbound, AfterCallWork	
		Objects=Agent, Place, GroupAgents, GroupPlaces	
		Subject=Action	
28	Informiam.Total_Talk_Time	Category=TotalTime	None
		MainMask=CallInbound, CallUnknown	
		Objects=Agent, Place, GroupAgents, GroupPlaces	
		Subject=DNAction	
29	Informiam.Total_Time_To_ Answer	Category=TotalTime	None
		Description=Total time to answer	
		MainMask=CallAnswered	
		Objects=GroupQueues,Queue,RoutePoint	
		Subject=DNAction	

Table 8: Stat Server Metrics (Continued)

Metric ID	Stat Server Metric Name	Definition	Conversion Type
30	Informiam.Total_Time_To_Answer_Agents	Category=TotalTime	None
		MainMask=OrigDNCallWait	
		Objects= GroupAgents, GroupPlaces	
		Subject=DNAction	
31	Informiam.Total_Time_Waiting_Calls	Category=CurrentTime	None
		Description=Total time for calls waiting in queue	
		MainMask=CallWait	
		Objects=GroupQueues, Queue, RoutePoint	
		Subject=DNAction	
32	Informiam.Utilization	Category=RelativeTime	None
		MainMask=CallInbound, CallOutbound, AfterCallWork	
		Objects=Agent, Place, GroupAgents, GroupPlaces	
		RelMask=*, ~NotReadyForNextCall, ~LoggedOut	
		Subject=AgentStatus	

Table 8: Stat Server Metrics (Continued)

Metric ID	Stat Server Metric Name	Definition	Conversion Type
80	Informiam.Total_LoggedIn_Time	Category=TotalTime	None
		MainMask=*, ~LoggedOut, ~NotMonitored	
		Objects=GroupAgents, GroupPlaces	
		Subject=AgentStatus	
81	Informiam.Total_NotReady_Time	Category=TotalTime	None
		MainMask=NotReadyForNextCall	
		Objects=GroupAgents, GroupPlaces	
		Subject=AgentStatus	
82	Informiam.Queue_Calls_Handled	Category=TotalNumber	None
		MainMask=CallReleased	
		Objects=Queue, GroupQueues, RoutePoint	
		Subject=DNAction	
83	Informiam.Queue_Talk_Time	Category=TotalTime	None
		MainMask=CallReleased	
		Objects=Queue, GroupQueues, RoutePoint	
		Subject=DNAction	

Table 8: Stat Server Metrics (Continued)

Metric ID	Stat Server Metric Name	Definition	Conversion Type
84	Informiam.Queue_Handle_Time	Category=TotalTime	None
		MainMask=CallReleased, ACWCompleted	
		Objects=Queue, GroupQueues, RoutePoint	
		Subject=DNAction	
85	Informiam.Queue_After_Call_Work_Time	Category=TotalTime	None
		MainMask= ACWCompleted	
		Objects=Queue, GroupQueues, RoutePoint	
		Subject=DNAction	
86	Informiam.CurrentAgent MembersLoggedIn	Category=CurrentState	addAgentsToGroup
		MainMask=LoggedIn	
		Objects=GroupAgents	
		Subject=DNAction	

Table 8: Stat Server Metrics (Continued)

Metric ID	Stat Server Metric Name	Definition	Conversion Type
87	Informiam.Queue_Outbound_Calls	Category=TotalNumber	None
		MainMask=CallEnteredOutbound	
		Objects=Queue, GroupQueues, RoutePoint	
		Subject= DNAction	
88	Informiam.Queue_Expected_Wait_Time	Category=ExpectedWaitTime	None
		MainMask=CallWait	
		Objects=GroupQueues, Queue, RoutePoint	
		RelMask=CallDistributed, CallAbandoned	
		Subject=DNAction	

Appendix

F Time Profiles

Table 9 shows all the time profiles included in the installation of the Genesys Adapter.

Table 9: Time Profiles

Time Profile Name	Time Profile Definition/Value	Description
Last30MinsGrowing,Growing	00:00+00:30	Statistics will reflect all activity that has happened since the last half hour point. For example, it will reflect all activity since 12:30, 1:00, or 1:30. The statistic resets to `0` at the start of every hour and at 30 minutes past the hour.
Last5Mins,Sliding	300:10:00	Statistics will reflect all activity that has happened in the last 5 minutes. The statistical value within the stat server will be sampled (updated) every 10 seconds.
OneDay,Growing	00:00	Statistics will reflect all activity that has happened since midnight. The statistic resets to `0` at midnight.
Last10Mins,Sliding	600:10:00	Statistics will reflect all activity that has happened in the last 10 minutes. The statistical value within the stat server will be sampled (updated) every 10 seconds.
Last20Mins,Sliding	1200:10:00	Statistics will reflect all activity that has happened in the last 20 minutes. The statistical value within the stat server will be sampled (updated) every 10 seconds.

Table 9: Time Profiles (Continued)

Time Profile Name	Time Profile Definition/Value	Description
Last30Mins,Sliding	1800:10:00	Statistics will reflect all activity that has happened in the last 30 minutes. The statistical value within the stat server will be sampled (updated) every 10 seconds.
Last40Mins,Sliding	2400:10:00	Statistics will reflect all activity that has happened in the last 40 minutes. The statistical value within the stat server will be sampled (updated) every 10 seconds.
Last60Mins,Sliding	3600:10:00	Statistics will reflect all activity that has happened in the last 60 minutes. The statistical value within the stat server will be sampled (updated) every 10 seconds.

Appendix

G Agent Group Metrics

Table 10 shows the list of all Advisors metrics retrieved for Contact Center Advisor and Workforce Advisor.

Table 10: Agent Group Metrics

Advisors Metric	Stat Server Metric	Time Profile	Filtered
AnswerWaitTimeTo5	Informiam.Total_Time_To_Answer_Agents	Last5Mins	Yes
Avail	Informiam.CurrNumberReady Statuses	CollectorDefault	No
AvgHandledCallsTalkTimeTo 5	Informiam.AverTalkStatusTime	Last5Mins	Yes
AvgHandledCallsTimeTo5	Informiam.AverHandleStatusTime	Last5Mins	Yes
CallsAnsweredTo5	Informiam.CallsAnswered	Last5Mins	Yes
CallsHandledHalf	Informiam.Interactions_Processed	Last30MinsGrowing	Yes
CallsHandledTo5	Informiam.Interactions_Processed	Last5Mins	Yes
CallsHandledToday	Informiam.Interactions_Processed	OneDay	Yes
CallsOfferedTo5	Informiam.CallsOffered	Last5Mins	Yes
Hold	Informiam.CurrNumberHoldStatuses	CollectorDefault	Yes
LoggedOn	Informiam.CurrAgentsLoggedIn	CollectorDefault	No
LoggedOnTimeTo5	Informiam.Total_LoggedIn_Time	Last5Mins	No
LongestAvailAgent	Informiam.LongestAvailAgent	CollectorDefault	No

Table 10: Agent Group Metrics (Continued)

Advisors Metric	Stat Server Metric	Time Profile	Filtered
NotReady	Informiam.CurrNumberNotReady Statuses	CollectorDefault	No
PercentUtilizationTo5	Informiam.Utilization	Last5Mins	No
Ready	Informiam.CurrentReadyAgents	CollectorDefault	No
TalkingIn	Informiam.Current_Calls_Inbound	CollectorDefault	Yes
TalkingOther	Informiam.Current_Calls_Other	CollectorDefault	No
TalkingOut	Informiam.Current_Calls_Outbound	CollectorDefault	No
TalkTimeHalf	Informiam.Total_Talk_Time	Last30MinsGrowing	Yes
TalkTimeTo5	Informiam.Total_Talk_Time	Last5Mins	Yes
TalkTimeToday	Informiam.Total_Talk_Time	OneDay	Yes
WorkReady	Informiam.CurrNumberACW Statuses	CollectorDefault	No
WorkReadyTimeHalf	Informiam.Total_ACW_Time	Last30MinsGrowing	No
WorkReadyTimeTo5	Informiam.Total_ACW_Time	Last5Mins	No
WorkReadyTimeToday	Informiam.Total_ACW_Time	OneDay	No

Appendix

H Queue Metrics and Agent Statistics

This appendix contains two sections:

Queue Metrics

Table 11 lists queue metrics.

Table 11: Queue Metrics

Advisors Metric	Stat Server Metric	Time Profile	Time Range	Filtered
ACWTimeHalf	Informiam.Queue_After_Call_Work_Time	Last30MinsGrowing	N/A	Yes
ACWTimeTo5	Informiam.Queue_After_Call_Work_Time	Last5Mins	N/A	Yes
ACWTimeToday	Informiam.Queue_After_Call_Work_Time	OneDay	N/A	Yes
AnswerWaitTimeHalf	Informiam.Total_Time_To_Answer	Last30MinsGrowing	N/A	Yes
AnswerWaitTimeTo5	Informiam.Total_Time_To_Answer	Last5Mins	N/A	Yes
AnswerWaitTimeToday	Informiam.Total_Time_To_Answer	OneDay	N/A	Yes

Table 11: Queue Metrics (Continued)

Advisors Metric	Stat Server Metric	Time Profile	Time Range	Filtered
CallsAnswered Half	Informiam.Total_Calls_Answered	Last30MinsGrowing	N/A	Yes
CallsAnsweredTo 5	Informiam.Total_Calls_Answered	Last5Mins	N/A	Yes
CallsAnswered Today	Informiam.Total_Calls_Answered	OneDay	N/A	Yes
CallsHandledHalf	Informiam.Queue_Calls_Handled	Last30MinsGrowing	N/A	Yes
CallsHandledTo5	Informiam.Queue_Calls_Handled	Last5Mins	N/A	Yes
CallsHandled Today	Informiam.Queue_Calls_Handled	OneDay	N/A	Yes
CallsOfferedHalf	Informiam.Total_Calls_Inbound	Last30MinsGrowing	N/A	Yes
CallsOfferedTo5	Informiam.Total_Calls_Inbound	Last5Mins	N/A	Yes
CallsOffered Today	Informiam.Total_Calls_Inbound	OneDay	N/A	Yes
CallsOutTo5	Informiam.Queue_Outbound_Calls	Last5Mins	N/A	Yes
CallsOutHalf	Informiam.Queue_Outbound_Calls	Last30MinsGrowing	N/A	Yes
CallsOutToday	Informiam.Queue_Outbound_Calls	OneDay	N/A	Yes
ExpectedDelay	Informiam.Queue_Expected_Wait_ Time	Last5Mins	N/A	Yes
HandleTimeHalf	Informiam.Queue_Handle_Time	Last30MinsGrowing	N/A	Yes
HandleTimeTo5	Informiam.Queue_Handle_Time	Last5Mins	N/A	Yes
HandleTime Today	Informiam.Queue_Handle_Time	OneDay	N/A	Yes
RouterCalls AbandQHalf	Informiam.Total_Calls_Abandoned	Last30MinsGrowing	N/A	Yes
RouterCalls AbandQTo5	Informiam.Total_Calls_Abandoned	Last5Mins	N/A	Yes
RouterCalls AbandQToday	Informiam.Total_Calls_Abandoned	OneDay	N/A	Yes

Table 11: Queue Metrics (Continued)

Advisors Metric	Stat Server Metric	Time Profile	Time Range	Filtered
RouterCallsQ Now	Informiam.CurrNumberWaitingCalls	CollectorDefault	N/A	Yes
RouterCallsQ NowTime	Informiam.Total_Time_Waiting_ Calls	CollectorDefault	N/A	Yes
RouterLongest CallQ	Informiam.CurrMaxCallWaitingTime	CollectorDefault	N/A	Yes
ServiceLevel AbandHalf	Informiam.ServiceLevelAband	Last30MinsGrowing	LessThan2 0Secs	Yes
ServiceLevel AbandTo5	Informiam.ServiceLevelAband	Last5Mins	LessThan2 0Secs	Yes
ServiceLevel AbandToday	Informiam.ServiceLevelAband	OneDay	LessThan2 0Secs	Yes
ServiceLevel CallsHalf	Informiam.ServiceLevelAnswered	Last30MinsGrowing	LessThan2 0Secs	Yes
ServiceLevel CallsTo5	Informiam.ServiceLevelAnswered	Last5Mins	LessThan2 0Secs	Yes
ServiceLevel CallsToday	Informiam.ServiceLevelAnswered	OneDay	LessThan2 0Secs	Yes
ServiceLevel CallsOnHoldHalf	Informiam.ServiceLevelCallsOnHold _Total	Last30MinsGrowing	GreaterTha n20 Secs	Yes
ServiceLevel CallsOnHoldTo5	Informiam.ServiceLevelCallsOnHold _Total	Last5Mins	GreaterTha n20 Secs	Yes
ServiceLevel CallsOnHold Today	Informiam.ServiceLevelCallsOnHold _Total	OneDay,Growing	GreaterTha n20 Secs	Yes
ServiceLevel CallsQHeld	Informiam.ServiceLevelCallsOnHold _Current	CollectorDefault	GreaterTha n20 Secs	Yes
TalkTimeHalf	Informiam.Queue_Talk_Time	Last30MinsGrowing	N/A	Yes

Table 11: Queue Metrics (Continued)

Advisors Metric	Stat Server Metric	Time Profile	Time Range	Filtered
TalkTimeTo5	Informiam.Queue_Talk_Time	Last5Mins	N/A	Yes
TalkTimeToday	Informiam.Queue_Talk_Time	OneDay	N/A	Yes

Agent Statistics

Table 12 lists agent statistics.

Table 12: Agent Statistics

Advisors Metric	Stat Server Metric	Time Profile	Filtered
AgentState	Informiam.CurrentAgentState	CollectorDefault	No
DateTimeLogin	Informiam.Informiam.CurrTotalLogin Time	CollectorDefault	No

Appendix

Web and E-mail Metrics (CCAdv Only)

This appendix contains two sections:

Queue Metrics—Web Chat

Table 13 lists Queue metrics for Web chat interactions.

Table 13: Queue Metrics—Web Chat

Names	Internal Name	Description	Source Type	Definition (Formula)	Interval/Time Profile	Threshold Type	Unit
Metric: [Entered] (a_wEntered)	a_wEntered	The total number of Chat interactions that entered the queue during the specified period.	Genesys Interaction Queues	ChatEnteredTo5 ChatEnteredHalf ChatEnteredToday	5 Min (rolling/sliding), 30 Min (since start of current half-hour), Today/Daily (since midnight)	N/A	Count
Metric: [InProc] (a_wInProc)	a_wInProc	Total number of Chats in processing at a point in time.	Genesys Interaction Queues	ChatInProcQ	Point in Time	N/A	Count
Metric: [InQ] (a_wInQ)	a_wInQ	The total number of interactions of the specified media type within the Interaction Queue at the moment of measurement.	Genesys Interaction Queues	ChatInQ	Point in Time		Count
Metric: [MaxQ] (a_wMaxQ)	wMaxQ	The maximum number of chats that either were awaiting processing or were in processing within the contact center (for single-tenant environments) or within the specified tenant (for multi-tenant environments) during the specified period.	Genesys Interaction Queues	ChatMaxInQTo5 ChatMaxInQHalf ChatMaxInQToday	5 Min (rolling/sliding), 30 Min (since start of current half-hour), Today/Daily (since midnight)		Count

Table 13: Queue Metrics—Web Chat (Continued)

Names	Internal Name	Description	Source Type	Definition (Formula)	Interval/Time Profile	Threshold Type	Unit
Metric: [MinQ] (a_wMinQ)	a_wMinQ	The minimum number of Web chats that were either waiting processing or in processing within this staging area within the specified period.	Genesys Interaction Queues	ChatMinInQTo5 ChatMinInQHalf ChatMinInQToday	5 Min (rolling/sliding), 30 Min (since start of current half-hour), Today/Daily (since midnight)		Count
Metric: [Moved] (a_wMoved)	a_wMoved	The total number of interactions of the specified media type that were moved from this staging area to any other staging area during the specified period.	Genesys Interaction Queues	ChatMovedTo5 ChatMovedHalf ChatMovedToday	5 Min (rolling/sliding), 30 Min (since start of current half-hour), Today/Daily (since midnight)	N/A	Count
Metric: [Processed] (a_wProc)	a_wProc	Total number of Chats processed, including revoked interactions for a specific time period.	Genesys Interaction Queues	ChatProcessedTo5 ChatProcessedHalf ChatProcessedToday	5 Min (rolling/sliding), 30 Min (since start of current half-hour), Today/Daily (since midnight)	N/A	Count

Queue Metrics—E-mail

Table 14 lists Queue metrics for e-mail interactions.

Table 14: Queue Metrics—E-mail

Names	Internal Name	Description	Source Type	Definition (Formula)	Interval/Time Profile	Threshold Type	Unit
Metric: [Backlog] (a_eBacklog)	Backlog (a_eBacklog)	The current number of emails currently waiting to be processed.	Genesys Interaction Queues	EmailBacklog	Point in Time	Above	Count
Metric: [Entered] (a_eEntered)	a_eEntered	The total number of Email interactions that entered the queue during the specified period.	Genesys Interaction Queues	EmailEnteredTo5 EmailEnteredHalf EmailEnteredToday	5 Min (rolling/sliding), 30 Min (since start of current half-hour), Today/Daily (since midnight)	N/A	Count
Metric: [InProc] (a_eInProc)	a_eProc	Total number of Emails in processing at a point in time.	Genesys Interaction Queues	EmailInProcQ	Point in Time	N/A	Count
Metric: [InQ] (a_eInQ)	a_eInQ	The total number of emails within the Interaction Queue at the moment of measurement.	Genesys Interaction Queues	EmailInQ	Point in Time	N/A	Count
Metric: [MaxQ] (a_eMaxQ)	eMaxQ	The maximum number of emails that either were awaiting processing or were in processing within the contact center (for single-tenant environments) or within the specified tenant (for multi-tenant environments) during the specified period.	Genesys Interaction Queues	EmailMaxInQTo5 EmailMaxInQHalf EmailMaxInQToday	5 Min (rolling/sliding), 30 Min (since start of current half-hour), Today/Daily (since midnight)		Count

Table 14: Queue Metrics—E-mail (Continued)

Names	Internal Name	Description	Source Type	Definition (Formula)	Interval/Time Profile	Threshold Type	Unit
Metric: [MinQ] (a_eMinQ)	eMinQ	The minimum number of emails that were either waiting processing or in processing within this staging area within the specified period.	Genesys Interaction Queues	EmailMinInQTo5 EmailMinInQHalf EmailMinInQToday	5 Min (rolling/sliding), 30 Min (since start of current half-hour), Today/Daily (since midnight)		Count
Metric: [Moved] (a_eMoved)	a_eMoved	The total number of interactions of the specified media type that were moved from this staging area to any other staging area during the specified period.	Genesys Interaction Queues	EmailMovedTo5 EmailMovedHalf EmailMovedToday	5 Min (rolling/sliding), 30 Min (since start of current half-hour), Today/Daily (since midnight)	N/A	Count

Skill Group Metrics—Web Chat

Table 15 lists Web chat metrics for Skill Groups.

Table 15: Skill Group Metrics—Web Chat

Name	Internal Name	Description	Source Type	Definition (Formula)	Interval/Time Profile	Threshold Type	Unit
Metric: [Acpt] (s_wAcpt)	s_wAcpt	The total number of Chat interactions that were offered for processing to the resource, and that were accepted during the specified period.	Genesys Agent Groups	ChatAcceptedTo5 ChatAcceptedHalf ChatAcceptedToday	5 Min (rolling/sliding), 30 Min (since start of current half-hour), Today/Daily (since midnight)	N/A	Count
Metric: [AHT] (s_wAHT)	s_wAHT	Average handle time in seconds for Chat interactions.	Calculated, Genesys Agent Groups	ChatHandleTimeTo5/ ChatHandledTo5 ChatHandleTimeHalf / ChatHandledHalf ChatHandleTime Today / ChatHandledToday	5 Min (rolling/sliding), 30 Min (since start of current half-hour), Today/Daily (since midnight)	Above	Seconds
Metric: [Handled%] (s_wHPct)	s_wHPct	The percentage of chats offered that were handled by this resource.	Calculated, Genesys Agent Groups	ChatHandledTo5/ ChatOfferedTo5 ChatHandledHalf / ChatOfferedHalf ChatHandledToday / ChatOfferedToday	5 Min (rolling/sliding), 30 Min (since start of current half-hour), Today/Daily (since midnight)	N/A	Percent
Metric: [Handled] (s_wH)	s_wH	The total number of Chat interactions that were handled by this resource during the specified period.	Genesys Agent Groups	ChatHandledTo5 ChatHandledHalf ChatHandledToday	5 Min (rolling/sliding), 30 Min (since start of current half-hour), Today/Daily (since midnight)	N/A	Count

Table 15: Skill Group Metrics—Web Chat (Continued)

Name	Internal Name	Description	Source Type	Definition (Formula)	Interval/Time Profile	Threshold Type	Unit
Metric: [HT] (s_wHT)	s_wHT	The total amount of time that this resource spent handling Chat interactions during the specified period.	Genesys Agent Groups	ChatHandleTimeTo5 ChatHandleTimeHalf ChatHandleTime Today	5 Min (rolling/sliding), 30 Min (since start of current half-hour), Today/Daily (since midnight)	Above	Seconds
Metric: [InbStopped] (s_wInbStop)	s_wInStop	The total number of Inbound Chat interactions that were terminated by this resource during the specified period.	Genesys Agent Groups	Chat_InbStopped_ Now Chat_InbStopped_ Half Chat_InbStopped_ Today	5 Min (rolling/sliding), 30 Min (since start of current half-hour), Today/Daily (since midnight)	N/A	Count
Metric: [InProc] (s_wInProc)	s_wInProc	Number of Chats currently being processed by the skill group	Genesys Agent Groups	ChatInProcessing	Point in Time		Count
Metric: [Offered] (s_wOffered)	s_wOffered	The number of Chats received by this skill group for the interval.	Genesys Agent Groups	ChatOfferedTo5 ChatOfferedHalf ChatOfferedToday	5 Min (rolling/sliding)		Count
Metric: [Rejected%] (s_wRjctPct)	s_wRjctPct	The percentage of Chats offered this resource that were rejected.	Calculated, Genesys Agent Groups	ChatRejectedTo5/ ChatOfferedTo5 ChatRejectedHalf / ChatOfferedHalf ChatRejectedToday / ChatOfferedToday	5 Min (rolling/sliding), 30 Min (since start of current half-hour), Today/Daily (since midnight)		Percent

Table 15: Skill Group Metrics—Web Chat (Continued)

Name	Internal Name	Description	Source Type	Definition (Formula)	Interval/Time Profile	Threshold Type	Unit
Metric: [Rejected] (s_wRjct)	s_wRjct	The total number of Chat interactions that were offered for processing to this resource, and that were rejected, during the specified period.	Genesys Agent Groups	ChatRejectedTo5 ChatRejectedHalf ChatRejectedToday	5 Min (rolling/sliding), 30 Min (since start of current half-hour), Today/Daily (since midnight)	Above	Count
Metric: [TimedOut%] (s_wTOPct)	s_wTOPct	The percentage of Chat Sessions that timed out.	Calculated, Genesys Agent Groups	ChatTimedOutTo5/ ChatOfferedTo5 ChatTimedOutHalf / ChatOfferedHalf ChatTimedOutToday / ChatOfferedToday	5 Min (rolling/sliding), 30 Min (since start of current half-hour), Today/Daily (since midnight)	Above	Percent
Metric: [TimedOut] (s_wTO)	s_wTO	The total number of Chat interactions that were accepted, pulled, or created and subsequently revoked by this resource because of prolonged nonactivity during the specified period.	Genesys Agent Groups	ChatTimedOutTo5 ChatTimedOutHalf ChatTimedOutToday	5 Min (rolling/sliding), 30 Min (since start of current half-hour), Today/Daily (since midnight)	Above	Count
Metric: [Txfrs] (s_wTxfrs)	s_wTxfrO	The total number of Chat transfers made by this resource during the specified period.	Genesys Agent Groups	ChatTransfersTo5 ChatTransfersHalf ChatTransfersToday	5 Min (rolling/sliding), 30 Min (since start of current half-hour), Today/Daily (since midnight)	N/A	Count

Skill Group Metrics—E-mail

Table 16 lists skill group metrics for e-mail.

Table 16: Skill Group Metrics—E-mail

Name	Internal Name	Description	Source Type	Definition (Formula)	Interval/Time Profile	Threshold Type	Unit
Metric: [Acpt] (s_eAcpt)	s_eAcpt	The total number of e-mail interactions that were offered for processing to the resource, and that were accepted during the specified period.	Genesys Agent Groups	EmailAcceptedTo5 EmailAcceptedHalf EmailAcceptedToday	5 Min (rolling/sliding), 30 Min (since start of current half-hour), Today/Daily (since midnight)		Count
Metric: [AHT] (s_eAHT)	s_eAHT	Average handle time in seconds for Emails counted as handled by the skill group during the current five-minute interval.	Calculated, Genesys Agent Groups	EmailHandleTimeTo5/ EmailHandledTo5 EmailHandleTime Half/ EmailHandledHalf EmailHandleTime Today/ EmailHandledToday	5 Min (rolling/sliding), 30 Min (since start of current half-hour), Today/Daily (since midnight)	Above	Seconds
Metric: [Handled%] (s_eHPct)	s_eHPct	The percentage of e-mails offered that were handled by this resource.	Calculated, Genesys Agent Groups	EmailHandledTo5/ EmailOfferedTo5 EmailHandledHalf / EmailOfferedHalf EmailHandledToday / EmailOfferedToday	5 Min (rolling/sliding), 30 Min (since start of current half-hour), Today/Daily (since midnight)	N/A	Percent
Metric: [Handled] (s_eH)	s_eH	Number of Emails handled during the specified period.	Genesys Agent Groups	EmailHandledTo5 EmailHandledHalf EmailHandledToday	5 Min (rolling/sliding), 30 Min (since start of current half-hour), Today/Daily (since midnight)		Count

Table 16: Skill Group Metrics—E-mail (Continued)

Name	Internal Name	Description	Source Type	Definition (Formula)	Interval/Time Profile	Threshold Type	Unit
Metric: [InbStopped] (s_eInbStop)	s_eInStop	The total number of Inbound Email interactions that were terminated by this resource during the specified period.	Genesys Agent Groups	Email_InbStopped_ Now Email_InbStopped_ Half Email_InbStopped_ Today	5 Min (rolling/sliding), 30 Min (since start of current half-hour), Today/Daily (since midnight)	N/A	Count
Metric: [Offered] (s_eOffered)	s_eOffered	The number of Emails received by this skill group for the interval.	Genesys Agent Groups	EmailOfferedTo5 EmailOfferedHalf EmailOfferedToday	5 Min (rolling/sliding), 30 Min (since start of current half-hour), Today/Daily (since midnight)		Count
Metric: [Rejected%] (s_eRjctPct)	s_eRjctPct	The percentage of Emails offered this resource that were rejected.	Calculated, Genesys Agent Groups	EmailRejectedTo5/ EmailOfferedTo5 EmailRejectedHalf / EmailOfferedHalf EmailRejectedToday / EmailOfferedToday	5 Min (rolling/sliding), 30 Min (since start of current half-hour), Today/Daily (since midnight)		Percent
Metric: [Rejected] (s_eRjct)	s_eRjct	The total number of Email interactions that were rejected in the specified time period.	Genesys Agent Groups	EmailRejectedTo5 EmailRejectedHalf EmailRejectedToday	5 Min (rolling/sliding), 30 Min (since start of current half-hour), Today/Daily (since midnight)	Above	Count
Metric: [TimedOut%] (s_eTOPct)	s_eTOPct	The percentage of Email interactions that timed out.	Calculated, Genesys Agent Groups	EmailTimedOutTo5/ EmailOfferedTo5 EmailTimedOutHalf / EmailOfferedHalf EmailTimedOut Today / EmailOfferedToday	5 Min (rolling/sliding), 30 Min (since start of current half-hour), Today/Daily (since midnight)	Above	Percent

Table 16: Skill Group Metrics—E-mail (Continued)

Name	Internal Name	Description	Source Type	Definition (Formula)	Interval/Time Profile	Threshold Type	Unit
Metric: [TimedOut] (s_eTO)	s_eTO	The total number of Email interactions that were accepted, pulled, or created and subsequently revoked by this resource because of prolonged nonactivity during the specified period.	Genesys Agent Groups	EmailTimedOutTo5 EmailTimedOutHalf EmailTimedOut Today	5 Min (rolling/sliding), 30 Min (since start of current half-hour), Today/Daily (since midnight)	Above	Count
Metric: [Txfrs] (s_eTxfrs)	s_eTxfrO	The total number of Email transfers made by this resource during the specified period.	Genesys Agent Groups	EmailTransfersTo5 EmailTransfersHalf EmailTransfersToday	5 Min (rolling/sliding), 30 Min (since start of current half-hour), Today/Daily (since midnight)	N/A	Count

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

Table 17: 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 207).	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 17: 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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