Performance Management Advisors 8.0

Frontline Advisor

Administration User's Guide

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Table of Contents

List of Procedures

Preface

Welcome to the Genesys *Performance Management Advisors 8.0 Frontline Advisor Administration User's Guide.* This document describes system administration functions for the Frontline Advisor parts of the Genesys Performance Management Advisors solution.

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

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

This preface contains the following sections:

For information about related resources and about the conventions that are used in this document, see the supplementary material starting on page 55.

About Frontline Advisor

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

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

Current status, performance, behavioral- or activity-based data can be presented in customized views. Sophisticated, configurable business rules

monitor key performance indicators and call attention to situations requiring immediate attention.

The alert activity in FrontlineAdvisor makes agent activity trends more obvious.

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

Intended Audience

This document is primarily intended for users of Frontline Advisors who have administrator privileges. It has been written with the assumption that you have a basic understanding of:

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

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Document History

New in Document Version 8.0.001.02

Minor textual corrections have been made in this release of the document.

Chapter

1 Frontline Advisor Administration

This chapter describes how to use the Frontline Advisor (FA) Administration Console (Figure 1 on page 12) to add or update thresholds and rules for a specific set of metrics, as well as define system-level settings.

It contains the following sections:

Using the FA Administration Console

Thresholds and rules continuously evaluate metrics, issue alerts, and help to focus the attention of supervisors onto the most important issues affecting their agents' performance and behavior. Each threshold checks one measured value at a point in time and triggers when the value falls within a pre-set range. Rules add another layer of sophistication by calling trigger functions that do more than simple range checking at points in time. Rules can count events throughout an interval of time, which allows them to trigger on the frequency of events.

Thresholds and rules should be aimed at highlighting significant situations and be very purposeful. Ideally, the number of alerts should be low: one or two per agent per day would lead to very effective coaching. Rules could monitor only one or two types of situations a week. Then the rules could be changed to tighten the triggering numbers in a future week (to "raise the bar"). For a suggested coaching strategy see "Tailoring a Coaching Strategy" on page 37.

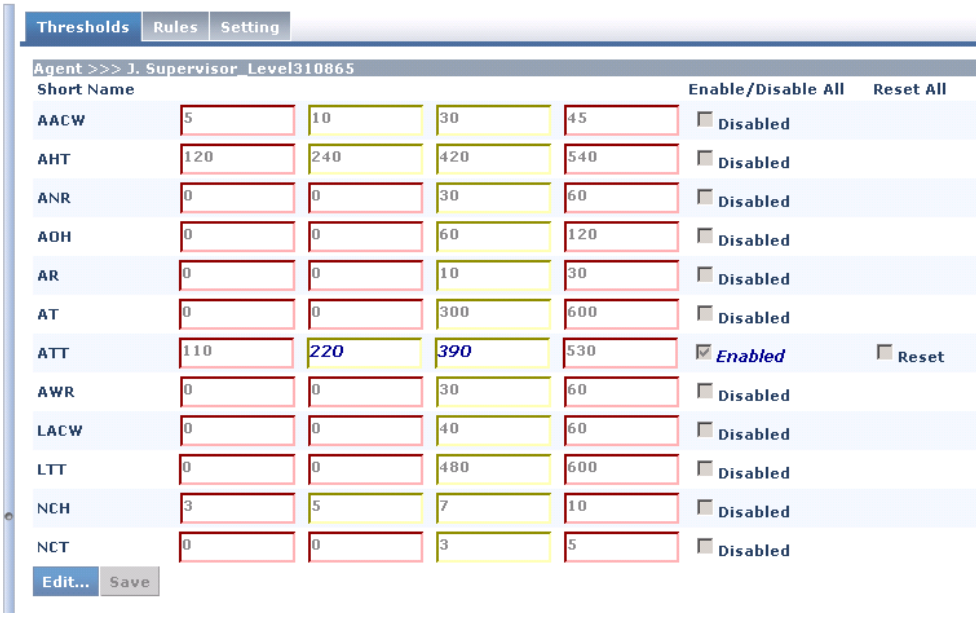


Figure 1: Administration Console

When a threshold is exceeded, the triggered threshold changes the appropriate text to red. When a rule is triggered, the rule creates an alert and posts it to the Supervisor Console. The status is visually represented:

Red indicates a critical alert.

Threshold violations are visible at all levels of the hierarchy, not just at the supervisor and agent levels. The actual violation at the agent level is highlighted in a solid color and the rolled up violation at the team and supervisor level is highlighted in a shaded color. Rule alerts roll up through all levels of the hierarchy; the value that rolls up is the count of uncleared alerts. This visibility provides a view of the overall performance for managers, directors, and vice presidents.

The Administration Console is where the administrator enters the threshold and rule values. The administrator can choose what rules and thresholds apply to each agent, supervisor or group (also called nodes) in the monitoring hierarchy and enable or disable the threshold or rules for each. Based on the settings made in the Administrator console, the appropriate alerts are displayed in the Frontline Advisor and Agent Advisor consoles.

Monitoring Hierachy Overview

Terminology

The monitoring hierarchy stores two types of information: groups and monitors. Groups can be groups of agents (also known as teams), or groups of groups, all the way to the root of the monitoring hierarchy which is one all-encompasing group. Monitors are people that are defined to have rights to monitor groups in the hierarchy.

The monitoring hierarchy is stored in a separate location, then imported into Frontline Advisor on a daily schedule that is defined by the administrator.

Sample Hierarchy

A sample monitoring hierarchy has nine teams of nineteen agents in a five-level hierarchy (Figure 2 on page 14). The sample monitoring hierarchy will be used to further explain the concepts of:

- Inheritance
- Enable/Disable

This section provides an overview of these concepts.

If the monitoring hierarchy is new to you, we recommend reading Appendix C, “Sample Monitoring Hierachy,” on page 51 and then coming back to this section.

The monitoring hierarchy defines how agents are grouped, how groups are grouped, and so on, until there is just one all-encompassing group at the top. The monitoring hierarchy also shows which people can monitor which groups or teams in FA (For more information, see “Monitors” on page 15).

Note: Groups may be referred to as “nodes” and the monitoring hierarchy as “tree.”

You may define your own Monitoring Hierarchy. For more information, see Appendix B, “Defining Your Monitoring Hierarchy,” on page 39.

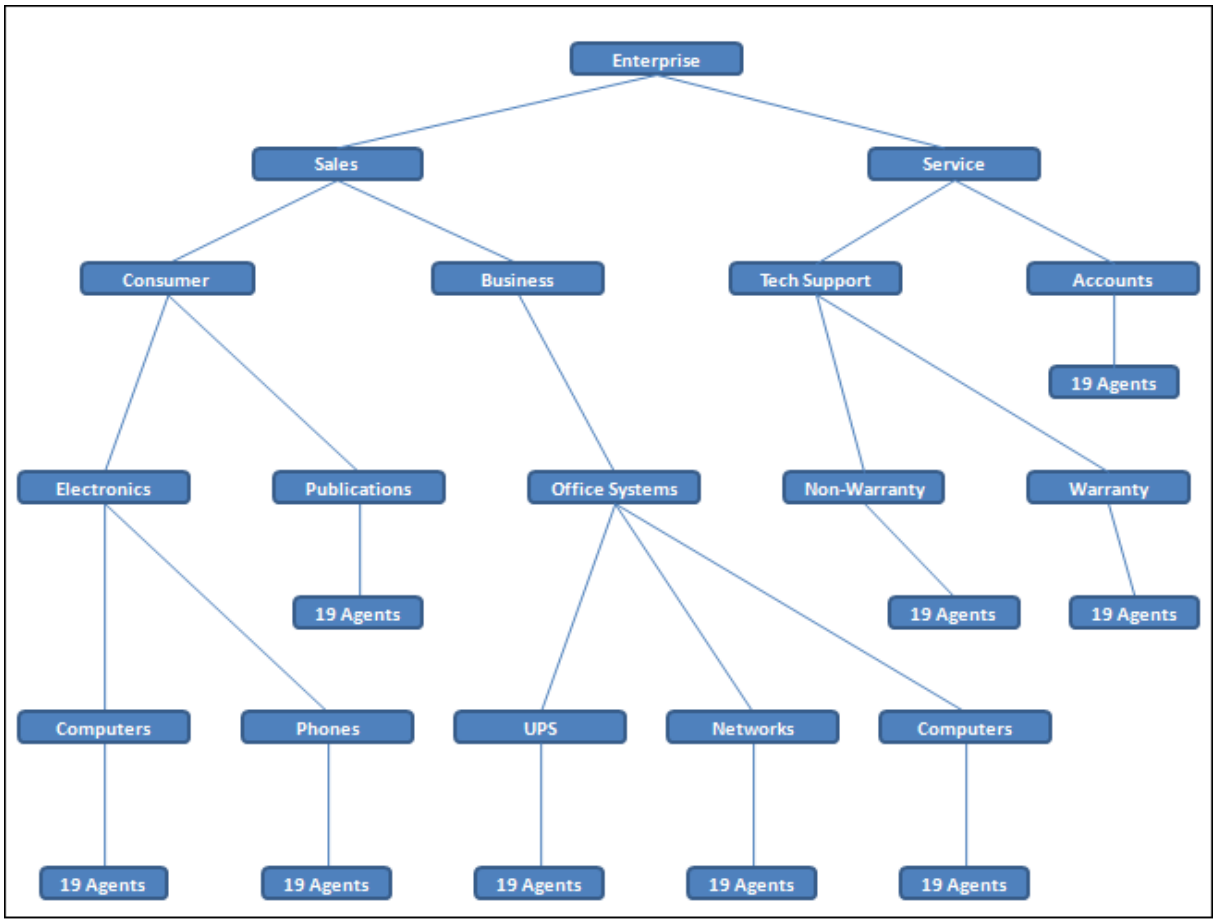


Figure 2: Sample Monitoring Hierarchy

Inheritance

Inheritance is the mechanism by which values higher in the tree are passed down to lower levels of the tree.

The behavior of a rule or threshold at a node is defined by the nearest ancestor node (including the node itself) where an override is defined. If there are no ancestors with overrides, the behavior is inherited by the root node (`Enterprise`). So, an override propagates down the hierarchy tree, until another override occurs, with all descendant nodes using the values defined at the override.

The agent's and team's values determine the status and trigger the alerts for thresholds.

The agent's values determine the status and trigger the alerts for rules.

`Note:` An override value stored at a node only affects inheritance if that node is enabled. If a node is disabled then the node is not involved in any inheritance behavior

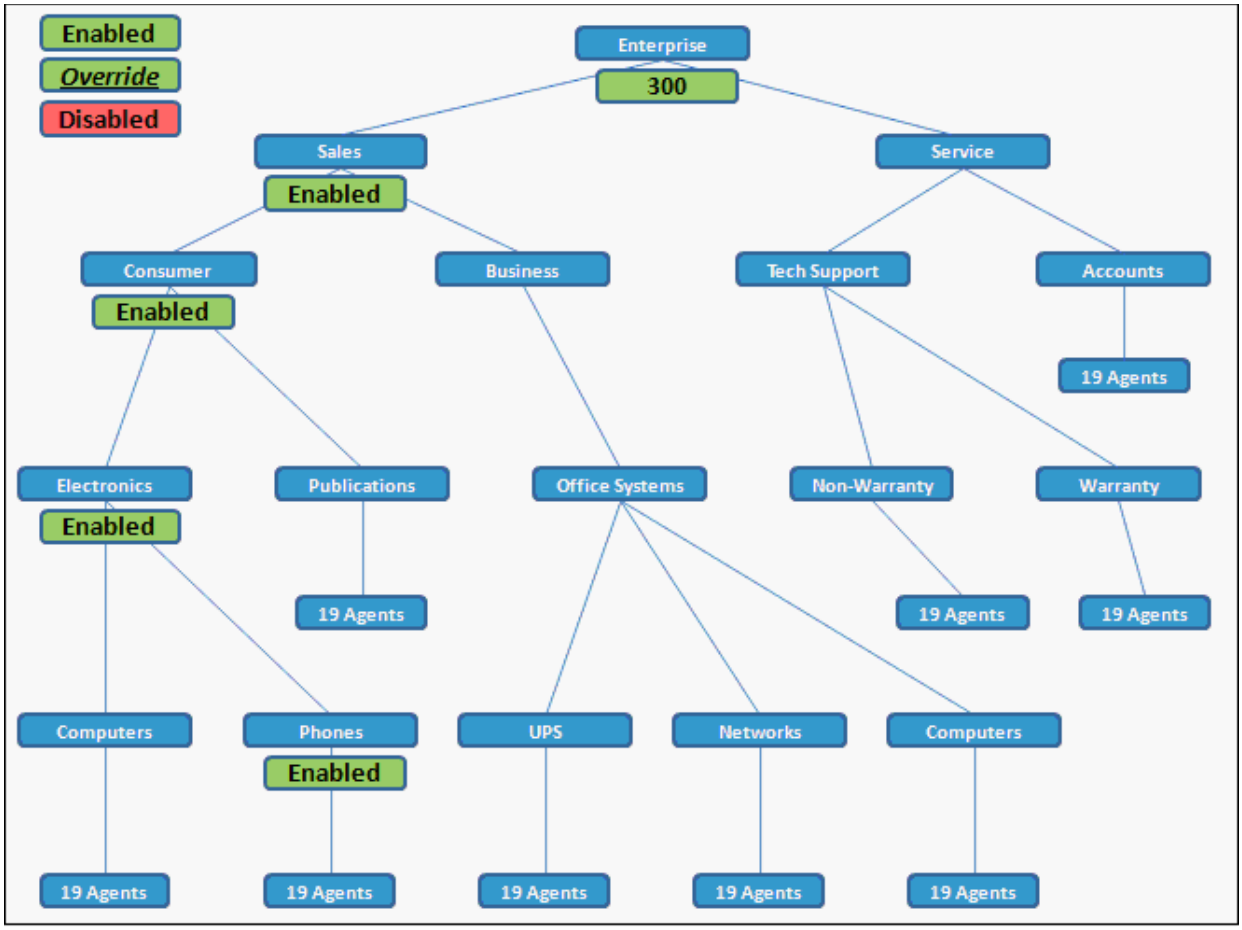


Figure 3: Phones Node

Monitors

The monitoring information defines which people can monitor which teams in Frontline Advisor. Figure 4 displays both the monitoring information and the grouping information. For a detailed example, see “Sample Monitoring Hierachy” on page 51.

The sample monitoring hierarchy defines one monitor (person) for each node in the tree: one person monitors the `Phones` node, one person monitors the `Electronics` node, one person monitors the `Consumer` node, and so on, with one person (monitor) for each node in the tree.

A monitor (person) that can monitor a node can automatically monitor all the descendent nodes. For example, Entemman can monitor all nodes in the hierarchy.

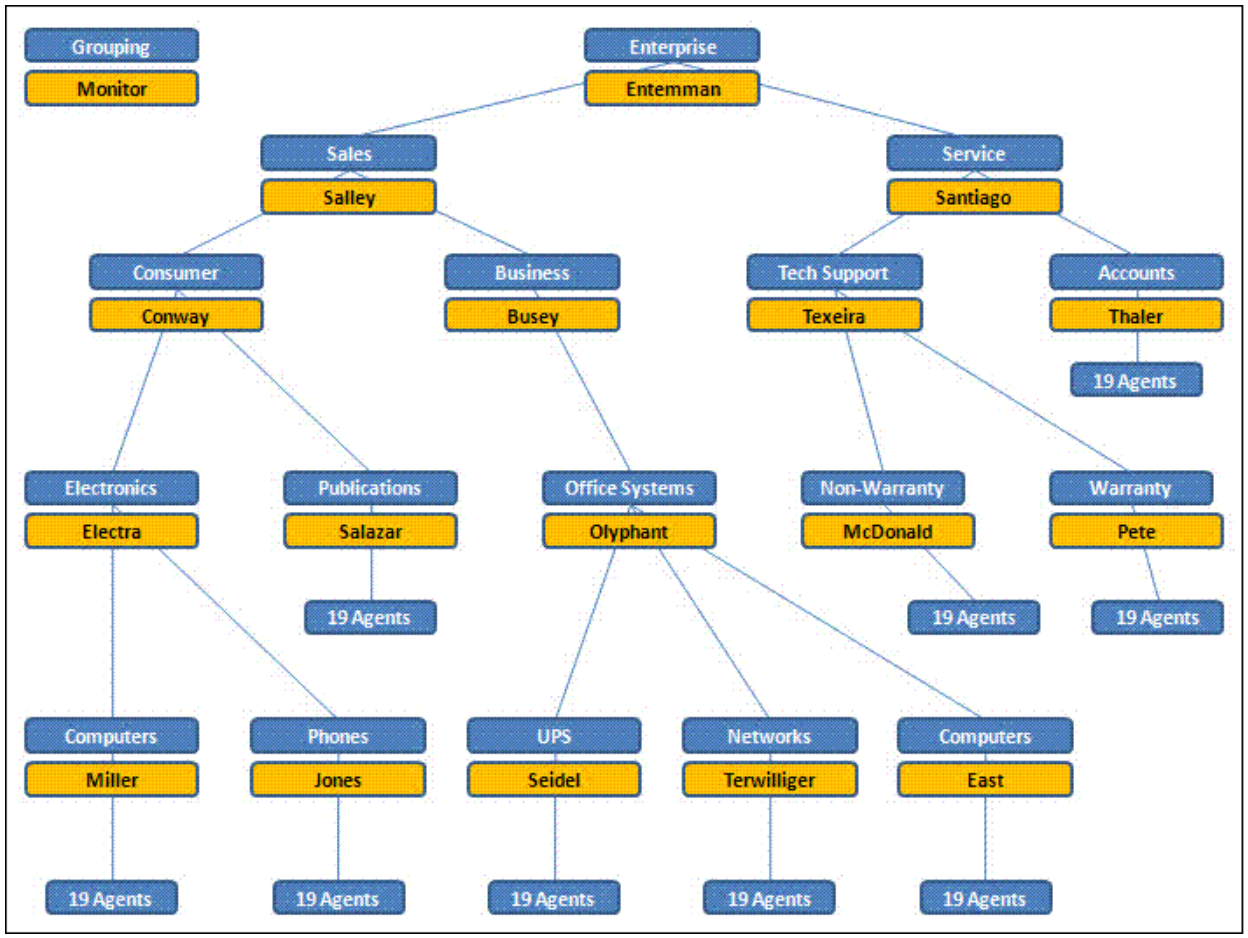


Figure 4: One Monitor per Group in the Monitoring Hierarchy

Enabling, Disabling, and Overriding Thresholds and Rules

At the global level, the threshold or rule can be enabled or disabled. By default the global thresholds and rules are disabled.

If a threshold or rule is disabled at a team level, then it is disabled for all agents on that team. The nodes underneath will inherit from the closest enabled ancestor.

If a threshold or rule is disabled at an agent level, then it is disabled for only that agent. Since there are no nodes under an agent, it affects only that agent. If a threshold or rule is overridden at an agent level, then its state applies only for that agent.

The state of a threshold or rule may be overridden at any level of the hierarchy. For example, if a threshold is enabled at the team level, then all agents in that team for which there are no overrides will have that threshold enabled.

Navigating the Monitoring Hierarchy

The Monitoring Hierarchy navigator is used to navigate to the area where thresholds and rules need to be viewed or modified (Figure 5). The Monitoring Hierarchy navigator lists a hierarchy of the managers, supervisors, teams, and agents imported from an external datasource. The monitoring hierarchy is imported from an external datasource into the FA hierarchy database. Frontline advisor imports data from the FA hierarchy database on startup and once everyday.

Once your monitoring hierarchy is defined (Appendix B, “Defining Your Monitoring Hierarchy,” on page 39) and imported, you maintain authorization to Frontline Advisor and Agent Advisor users in the Administration Workbench, which is a component of Platform in release 8.0. You can expand the hierarchy from managers down to agents, see “Expanding and Collapsing Hierarchies” on page 35.

Figure 5: Monitoring Hierarchy Navigator

Defining Conditions for Metrics

The `Thresholds` tab (Figure 6 on page 18) allows you to define the critical and acceptable conditions for the metrics. The standard installation provides the monitoring hierarchy with default values for all agent and team thresholds; however, you should review and change the values accordingly. An agent threshold takes precedence over the team threshold. A team threshold takes precedence over the global threshold. Each section lists the display name and the description of the metrics.

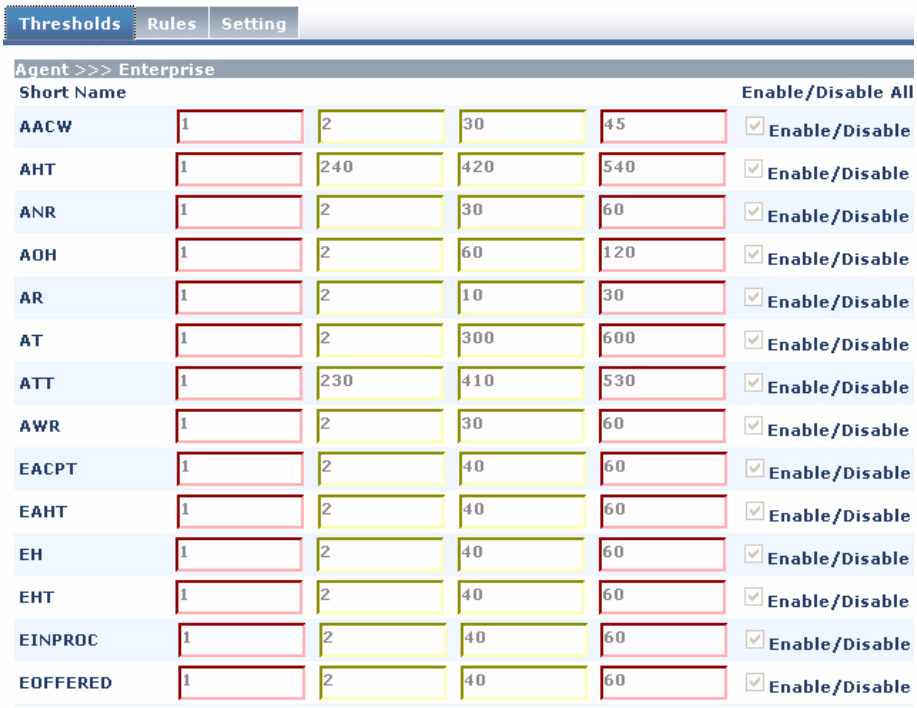


Figure 6: Thresholds Tab

Tables 1 and 2 list the short and long names of the threshold metrics. On the `Thresholds` tab, tooltips display the full name

Table 1: Agent Threshold Metrics

Acronym	Description
NCH	Calls Handled by an Agent
AHT	Agent Avg Handle Time
ATT	Agent Avg Talk Time
AACW	Agent Avg Wrap Time
NCT	Calls Transferred by an Agent
LTT	Agent Longest Call
LACW	Agent Longest Wrap
ANR	Agent Not Ready
AOH	Agent On Hold
AR	Agent Ready
AT	Agent Talking

Table 1: Agent Threshold Metrics (Continued)

Acronym	Description
AWR	Agent Work Ready
AWNR	Agent Work Not Ready
eAcpt	Agent Number of Email Interactions Accepted
eRjct	Agent Number of Email Interactions Rejected
eTO	Agent Number of Email Interactions Accepted/Pulled/Created & subsequently revoked
eTxfrs	Agent Number of Email Transfers
eH	Agent Number of Emails Handled
eOffered	Agent Number of Emails Received
eInProc	Agent Number of Emails Currently being Processed
eHT	Agent Total Handle Time for Emails
eRjctPct	Agent Email Reject Percentage (eRjct*100/eOffered)
eTOPct	Agent Email Time Out Percentange (eTO*100/eOffered)
eAHT	Agent Average Handle Time for Emails (eHT/eH) in secs
wAcpt	Agent Number of Chat Interactions Accepted
wRjct	Agent Number of Chat Interactions Rejected
wTO	Agent Number of Chat Interactions Accepted/Pulled/Created and subsequently revoked
wTxfrs	Agent Number of Chat Transfers
wH	Agent Number of Chat Interactions Handled
wOffered	Agent Number of Chat Interactions Received
wInProc	Agent Number of Chat Interactions Currently being Processed
wHT	Agent Total Handle Time for Chat Interactions
wRjctPct	Agent Percentage of Chat Interactions Rejected. (wRjct*100/wOffered)

Table 1: Agent Threshold Metrics (Continued)

Acronym	Description
wTOPct	Agent Percentage of Chat Interactions Timed Out. (wTO*100/wOffered)
wAHT	Agent Average Handle Time for Chat Interactions in secs (wHT/wH)

Table 2: Team Threshold Metrics

Acronym	Description
TNCH	Calls Handled by a Team
TAHT	Team Avg Handle Time
TATT	Team Avg Talk Time
TAACW	Team Avg Wrap Time
TNCT	Calls Transferred by Team Agents
TLTT	Team Longest Call
TLACW	Team Longest Wrap
team_eAcpt	Team Number of Email Interactions Accepted
team_eRjct	Team Number of Email Interactions Rejected
team_eTO	Team Number of Email Interactions Accepted/Pulled/Created & subsequently revoked
team_eTxfrs	Team Number of Email Transfers
team_eH	Team Number of Emails Handle
team_eOffered	Team Number of Emails Received
team_eInProc	Team Number of Emails Currently being Processed
team_eHT	Team Total Handle Time for Emails
team_eRjctPct	Team Percentage of Emails Rejected (eRjct*100/eOffered)
team_eTOPct	Team Percentage of Emails Timed Out (eTO*100/eOffered)

Table 2: Team Threshold Metrics (Continued)

Acronym	Description
team_eAHT	Team Average Handle Time for Emails in secs (eHT/eH)
team_wAcpt	Team Number of Chat Interactions Accepted
team_wRjct	Team Number of Chat Interactions Rejected
team_wTO	Team Number of Chat Interactions Accepted/Pulled/Created & subsequently revoked
team_wTxfrs	Team Number of Chat Interactions Transferred
team_wH	Team Number of Chat Interactions Handled
team_wOffered	Team Number of Chat Interactions Received
team_wInProc	Team Number of Chat Interactions currently being Processed
team_wHT	Team Total Handle Time for Chat Interactions
team_wRjctPct	Team Percentage of Chat Interactions Rejected (wRjct*100/wOffered)
team_wTOPct	Team Percentage of Chat Interactions Timed Out. (wTO*100/wOffered)
team_wAHT	Team Average Handle Time for Chat Interactions in secs (wHT/wH)

Threshold Types

You can configure four types of thresholds. Depending on the metric, a value may be acceptable above or below a certain value. When thresholds are triggered, they highlight cells in the Manager or Agent Console. The four text boxes are colored to provide a visual cue for the status (Figure 7). The red bars are mandatory, while the yellow text box is optional (and may be replaced by a red text box). The colors change depending on the values you type. Some rules trigger an alert if the value is below or above defined values, as shown in

Table 3. Red indicates a critical value range. Yellow indicates a warning value range.

Table 3: Alert Thresholds

If value is...	Value 1...	And...	Value 2...	Result
greater than	the value in the 4th text box			then the value is critical high (red)
greater than	the value in the 3rd text box	and less than or equal to	the value in the 4th text box	then the value is warning high (yellow)
greater than or equal to	the value in the 2nd text box	and less than or equal to	the value in the 3rd text box	then the value is acceptable (no color is displayed)
greater than or equal to	the value in the 1st text box	and less than	the value in the 2nd text box	then the value is warning low (yellow)
less than	the value in the 1st text box			then the value is critical low (red)

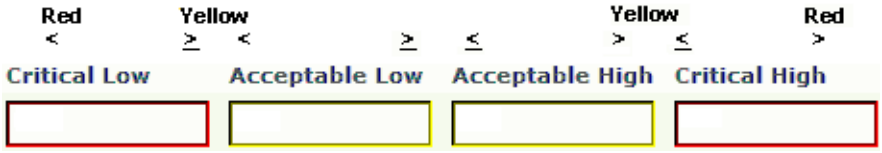


Figure 7: Threshold Bar

Examples

The system setting for how often the metrics are calculated (that is, the performance calculation interval) is 10 minutes for the purposes of these examples.

Example 1 For an average of three-minute calls, handling two or more calls but less than or equal to five calls is acceptable. Handling one call is yellow. Handling less than one call is red. Handling more than five calls but less than or equal to eight calls (that is, the calls are too short) is yellow. And handling more than eight calls (that is, short-calling) is red (Figure 8)

Figure 8: Threshold Acceptable between Two Values

Example 2 In the example in Figure 9, handling two or more calls but less than or equal to fivecalls is acceptable. Handling one call triggers a warning (yellow). Handling less than one call or more than five calls is a critical (red).

Figure 9: Threshold Without a High Yellow Warning

Example 3 In the example in Figure 10, handling one or more calls but less than or equal to five calls is acceptable. Handling more than five calls but less than or equal to eight calls triggers a warning (yellow). Handling less than one call or more than eight calls is a critical (red).

Figure 10: Threshold Without a Low Yellow Warning

Viewing Thresholds

Procedure: Viewing thresholds

Purpose: To view threshold values in another level of the monitoring hierarchy.

Start of procedure

1. Select the `Thresholds` tab.
   The thresholds are displayed based on the last selected level.
2. Select a level in the Monitoring Hierarchy navigator.
   The thresholds for the selected level are displayed in the pane on the right. The name of the selected level displays in the title bar.

End of procedure

Example

The `Enterprise` (top) node displays default values (Figure 11 on page 24). The default values for the Average Handle Time (AHT) threshold for the `Enterprise` node are `120, 240, 420,` and `540`. The critical high value for AHT is `540` (seconds). This means that the `Enterprise` node stores a value of `540` for critical high AHT.

Figure 11: Enterprise Level of the Thresholds Tab

`Conway` is a monitor of the `Consumers` node (Figure 4 on page 16). Navigate from the threshold values of the `Enterprise` node, monitored by `Entemman`, to those of the `Consumers` node, monitored by `Conway` by clicking on `Conway` in the Monitoring Hierarchy navigator (Figure 12).

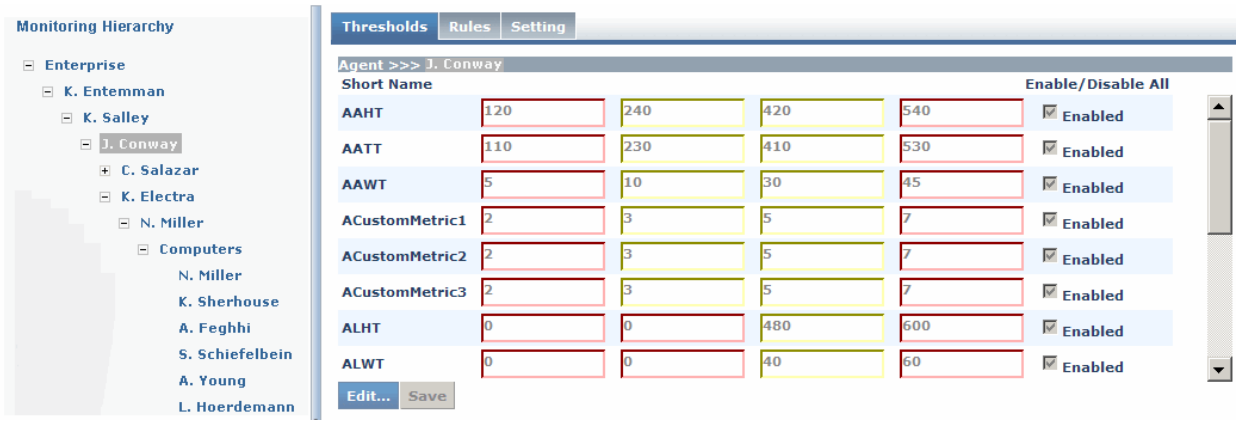


Figure 12: Inherit Critical High AHT, 540

As displayed in Figure 12, `Conway` inherits the value of `540` (for Critical High AHT) from the `Enterprise` node.

Disable/Override All Thresholds

To disable or override all thresholds at the selected node at once, click Enable/Disable All.

Defining a Threshold

Default values for thresholds are provided on installation; however, you can override them at any level. To distinguish between the default values and

overridden values, overridden values display in boldface and italicized. Inherited values are in regular font. You can display the default value in a ToolTip by moving the cursor over an edited value. For more information, see “ToolTips” on page 33.

For a team or agent, the state of thresholds at new nodes is inherited from the parent node. This includes whether the threshold is enabled or disabled.

Procedure: Defining a threshold

Start of procedure

1. Select the `Thresholds` tab (Figure 6).
   The thresholds for the last selected level are displayed.
2. To define thresholds, select a level in the Monitoring Hierarchy navigator.
   The thresholds and the title bar for the selected level display.

   Note: If any text field or check box is changed and you select a new level, all changes for the previous level are discarded..
3. Click `Edit`.
   The fields and Save button enable. The `Edit` button changes to a `Cancel` button.
4. Type new values in one or more text boxes.
   The values must increment (or remain the same) from left to right. Positive integer numbers are allowed. No letters or blank spaces are allowed.
   If an invalid value is entered, an alert message box displays when the `Save` button is pressed.
5. To activate the threshold, check the `Enabled` checkbox.
   To deactivitate the threshold, clear the `Enabled` checkbox.
6. To save all of the changes to the thresholds, click `Save`.
   A confirmation message displays. If any errors are detected through validation, an alert message displays.

End of procedure

Example

Suppose that you want to store an override value of `600` at the node that `Conway` monitors, that is, the `Consumer` node. To enter an override value, click the `Edit` button to enter the edit mode (Figure 12). Type a value of `600` for Critical High AHT (Figure 13). Then click the `Save` button. The override value of `600` now displays at the `Conway` (`Consumer`) node in italic font, and a slightly larger font

than the other (inherited) values (Figure 13). Note that the node has been set to enable.

From now on, if nothing else changes, the `Conway/Consumer` node and all nodes in that subtree (which do not have an override value) will inherit a value of `600` for critical high AHT.

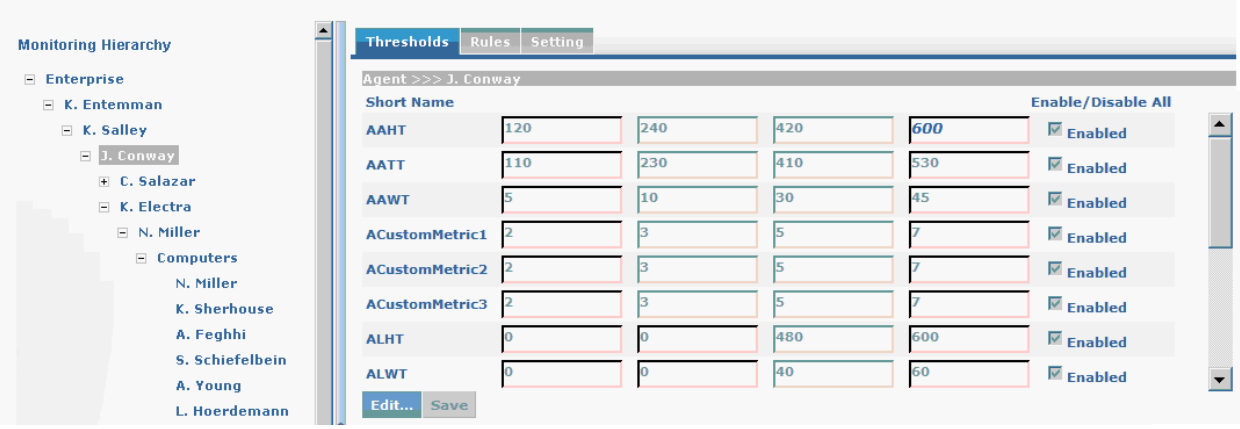


Figure 13: Override Critical High AHT, 600

Cancel

To discard any changes made and revert the contents of the `Thresholds` tab to the last values saved to the database, click `Cancel`.

Reset

A `Reset` checkbox will appear next to the a threshold row after one of the threshold attributes has been overridden. Checking the `Reset` box and saving will result in reverting the threshold attributes to the previously inherited values. The `Reset` checkbox will then disappear.

The `Reset All` link will perform the reset operation to all overridden thresholds in the manner described above.

Defining Conditions to Monitor Agent Statistics

The `Rules` tab (Figure 14) allows you to define the conditions that will continuously monitor the agents' statistics, such as short calling. If the conditions of a rule are met an alert is issued. The installation provides default values; however, you should review and change them accordingly. You can modify them at the team level, agent level, or for a higher level this should be selected in the hierarchy tree. An agent rule takes precedence over the team

rule. A team rule takes precedence over the global rule. Rules evaluate and trigger on agent metrics, but not for team metrics.

To distinguish between the inherited values and overridden values, overridden values display in boldface and italicized.

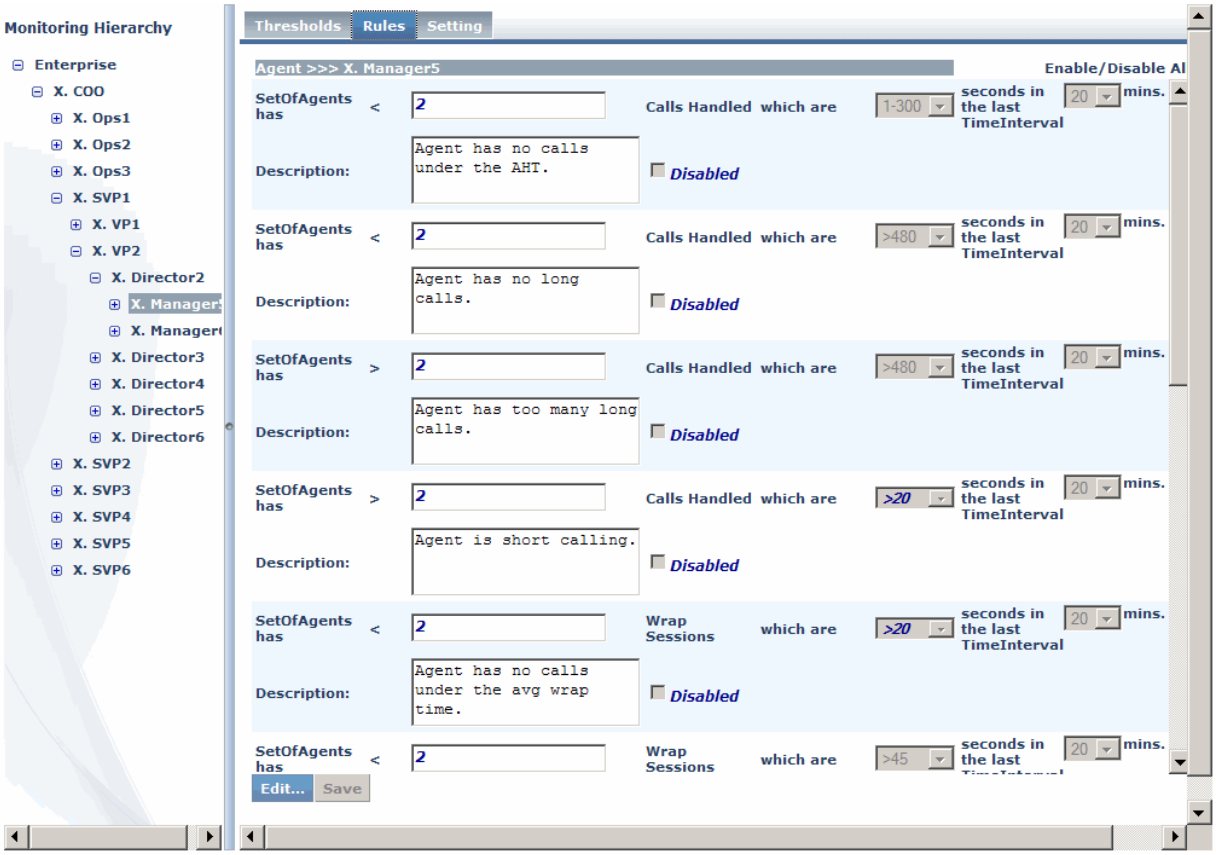


Figure 14: Rules Tab

The agent rule metrics are:

- Handle Time Duration
- Wrap Time Duration
- Count of Holds
- Count of Transfers

Each rule may include the following:

- Rule descriptor—a fixed text that describes the rule; for example, "`Set of agents has`".
- Rule operator—less than (<), greater than (>).
- Rule operator value—positive integers and positive decimal floating point numbers are allowed. No letters or blank spaces are allowed.
- Filter descriptor—fixed text that describes the filter, for example, "`Calls handled which are`"

- Rule filter operator—less than (<), greater than (>)
- Rule filter value—these are predefined and can be selected from a drop-down list.
- Time Interval—the frequency in which the rule evaluates the metrics. The predefined available values include 5, 10, 20, 30, 40, and 60.
- Description—a description of the rule that will display in the `Alert Details` section when an alert is triggered. The text field allows up to 256 characters.

Figure 15: Rule Example

If an invalid value is entered, an alert message box displays when the `Save` button is pressed.

For example, a rule for short calling could be the set of agents has more than two calls handled that are less than 20 seconds in the last 20 minutes.

Viewing Rules

Procedure: Viewing rules

Start of procedure

1. Select the `Rules` tab.
   The rules are displayed based on the last selected level. The edited values display in boldface and italicized.
2. Select a level in the Monitoring Hierarchy navigator.
   The rules for the selected level are displayed in the pane on the right. The name of the selected level displays in the title bar.

End of procedure

Example

The example below illustrates the default settings for rules at the top node (`Enterprise` in our monitoring hierarchy) (Figure 16).

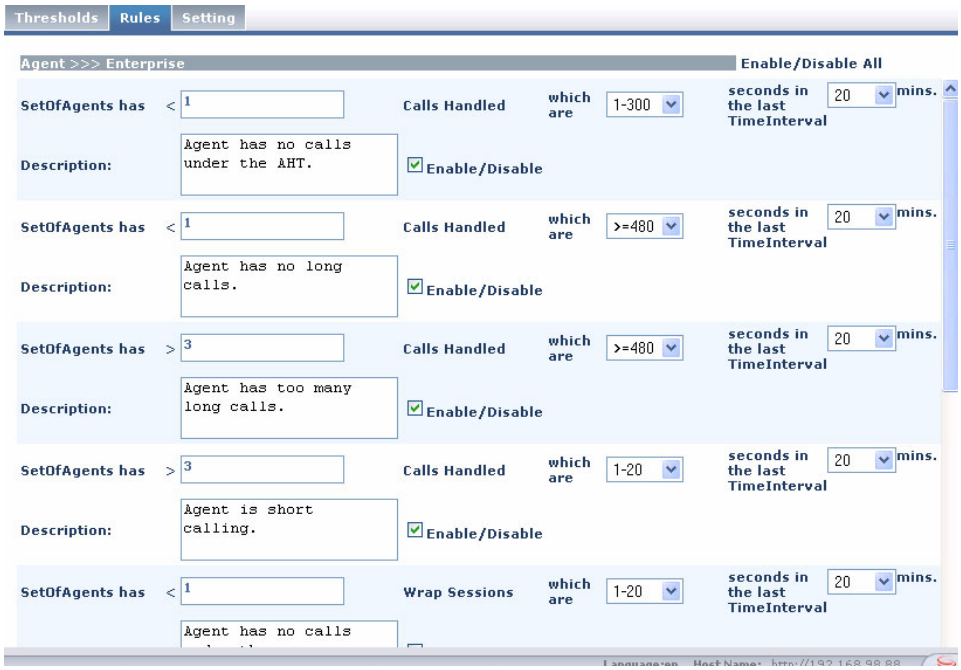


Figure 16: Default Calls Handled, 300

When you navigate to the `Conway` node in the monitoring hierarchy, you see that the value of `300` for `Calls Handled` from the `Enterprise` node is inherited by the `Conway` node (Figure 16).

Disable/Override All Rules

To disable or override all rules at once, click `Enable/Disable All`.

Defining Rules

Procedure: Defining a rule

Start of procedure

1. Select the `Rules` tab (Figure 14).
   The rules for the last selected level display.
2. To define rules, select a level in the Monitoring Hierarchy navigator.
   The rules and the title bar for the selected level display.

> Note: If any text field or check box is changed and you select a new level without saving the changes, all changes are lost.

3. Click `Edit`.
   The fields and `Save` button are enabled. The `Edit` button changes to a `Cancel` button.
4. Type a rule operator value.
5. If available, type a rule filter operator value.
6. Select a time interval from the drop-down list.
7. Type a comprehensive description of the rule in the `Description` text box.
8. To activate the rule, check the `Enabled` checkbox or
   to deactivate the rule, clear the `Enabled` checkbox.
9. To save all of the rules, click `Save`.
   If any errors are detected through validation, an alert message displays.

End of procedure

Example

Suppose you want to override the inherited `Calls Handled` value of `300` with an override value of `600` for the `Conway` node and its subtree.

To modify a rule value, first click the `Edit` button (not displayed in Figure 17 because it is scrolled out of view).

Then enter the override value and click the `Save` button. Figure 17 displays what the values now look like.

From now on, unless changes are made, the `Conway` node contains an override value of `600`. All nodes in the subtree, if they are enabled and if they do not have their own override value, inherit the value of `600`.

Overridden rules are not automatically enabled, although in this example you would typically also enable it besides changing the definition.

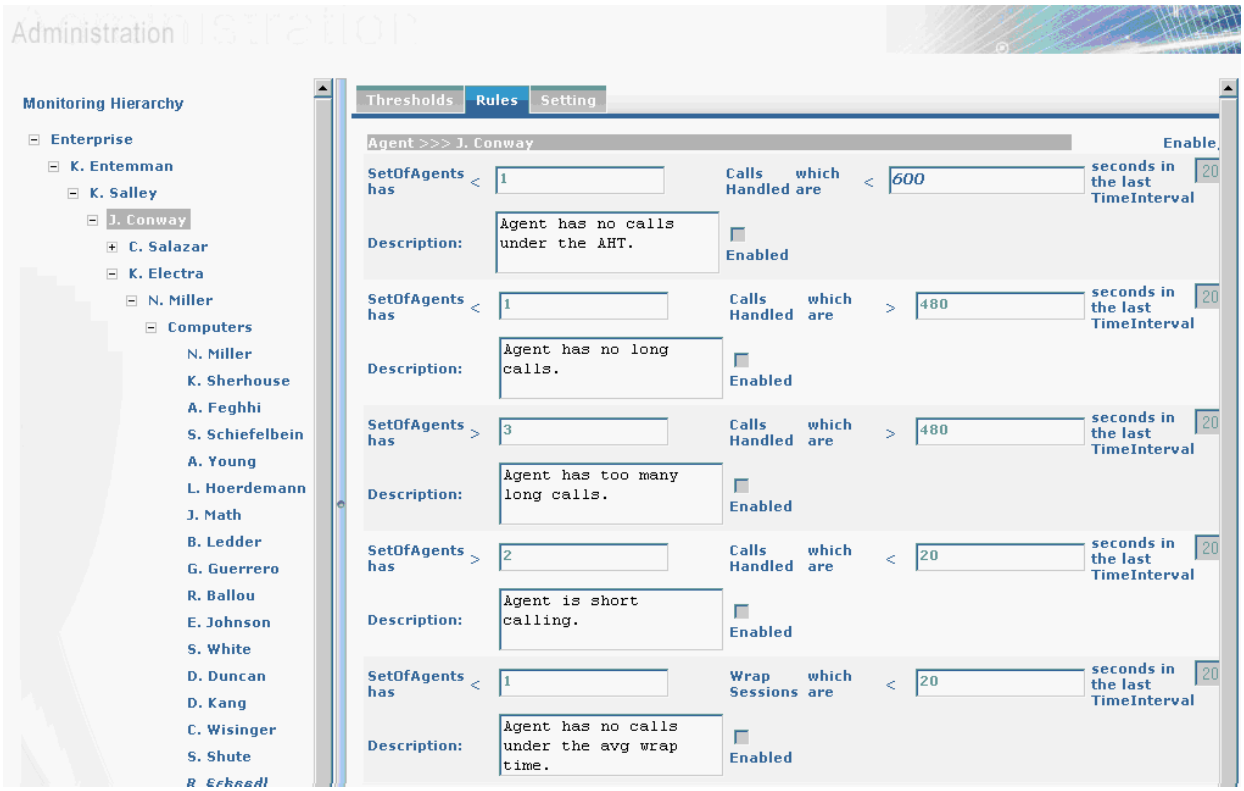


Figure 17: Override Calls Handled, 600

Cancel

To discard any changes made and revert the contents of either the `Rules` tab to the last values saved to the database, click `Cancel`.

Reset

Once a constraint has been overridden, it is possible to "reset" the constraint to the inherited values. This effectively removes the override from the system. At any given node in the hierarchy (apart from the top-level Enterprise node), a `Reset` option will be available for all constraints that are overridden at that node. For example, consider the following screenshot from the `Thresholds` tab:

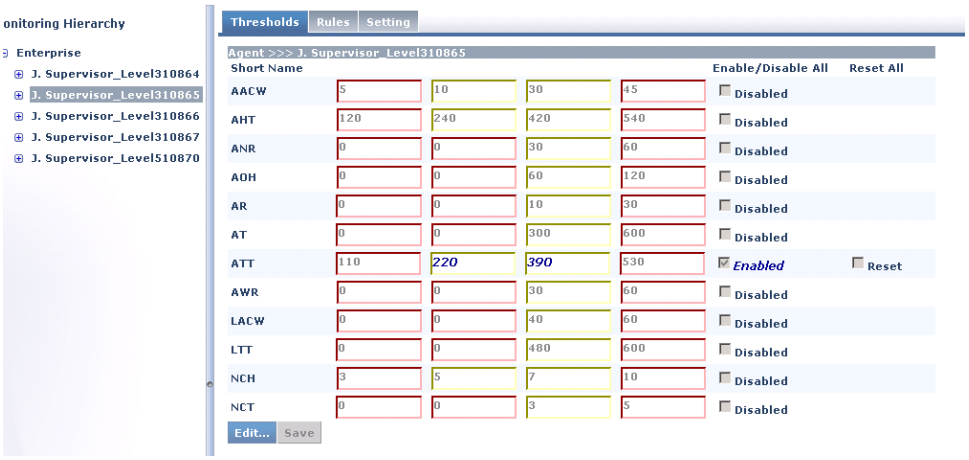


Figure 18: Reset Button

The Average Talk Time (ATT) threshold has been overridden (as indicated by the bold text), and so a `Reset` option is displayed for this threshold. Checking this option and clicking `Save` will result in the inherited values for this threshold being used at this node and its descendants (unless overridden elsewhere). Note that choosing to reset an overridden constraint takes precedence over any edits made to the other fields; these changes are lost when the constraint is reset. A value is reset to the value of the closest parent in the tree that has an override or the enterprise node if there are no overrides higher up in the hierarchy. For example, take the following hierarchy again and the AHT metric:

Figure 19: Resetting Metrics Example

If the thresholds for the AHT metric are overridden at K.Salley, J.Conway, and Networks, resetting the AHT metric at the Networks node would set it to the values specified for the J.Conway node. If the metrics are then reset at the J.Conway node, the threshold values at that node and all its children will be set to what is specified at K.Salley.

This functionality works for either overridden threshold values or for the `Enable/Disable` checkbox.

System Settings

On the `Settings` tab, you configure the system settings for:

- `Agent Name Visibility`—Show or hide the agent names and IDs in Frontline Advisor or Agent Advisor from all views and printouts. The default is to show the agent names and IDs.
- `Agent Performance Interval` (seconds)—The agent performance interval is the frequency of updating the team's and agent's performance data and refreshing the cache data. Typically, it is configured to 10 minutes.
- `Agent State Interval` (seconds)—The agent state interval is the frequency of updating the agent's state data. Typically, it is configured to 10 seconds.
- `Performance Calculation Interval` (seconds)—The performance calculation interval indicates how many seconds back into the past the agent performance query should go. The default is 600 seconds.

To change the settings, type values in the text boxes and click `Save`.

To discard any changes made and revert the contents to the last values saved to the database, click `Cancel`.

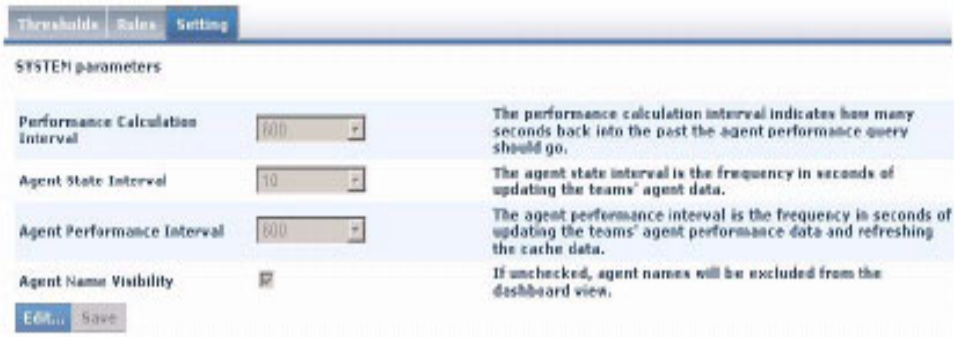


Figure 20: System Settings Page

Navigation

ToolTips

To display a ToolTip for an action, hover the cursor over the icon or button. Tooltips also help you see which values are inherited or overridden, and where those values come from. This helps when navigating through the monitoring hierarchy and viewing or modifying values. ToolTips always display whether a node is enabled or disabled.

When you hover the mouse over a threshold or rule value, a tooltip displays one of the following types:

- Type 1—The value is inherited from the root node (threshold only).
- Type 2—The value is inherited from the root node (rule only).
- Type 3—The value is inherited from a node other than the root node (threshold or rule). Two pieces of information are displayed:
  - The value is inherited
  - The node the inherited value comes from
- Type 4—The value overrides an inherited value (threshold or rule). Three pieces of information are displayed:
  - The value is an override value
  - The node whose value is being overridden
  - The inherited value that is being overridden

Type 1

Figure 21: Type 1

This ToolTip (Figure 21) displays if you mouse over the inherited threshold value of 540 from the root node.

Type 2

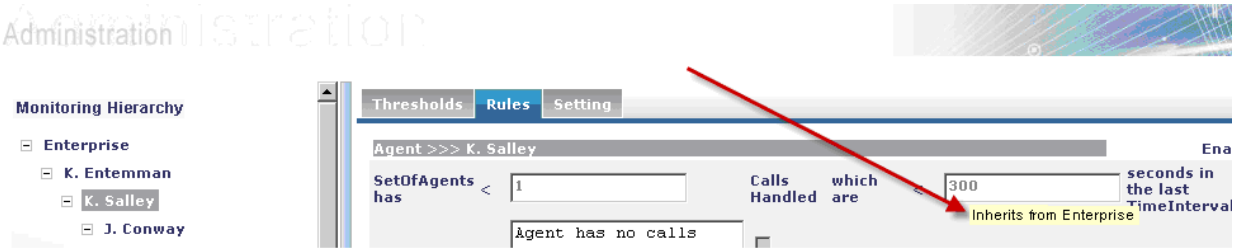


Figure 22: Type 2

This ToolTip (Figure 22) displays if you mouse over the inherited rule value of 300 from the root node.

Type 3

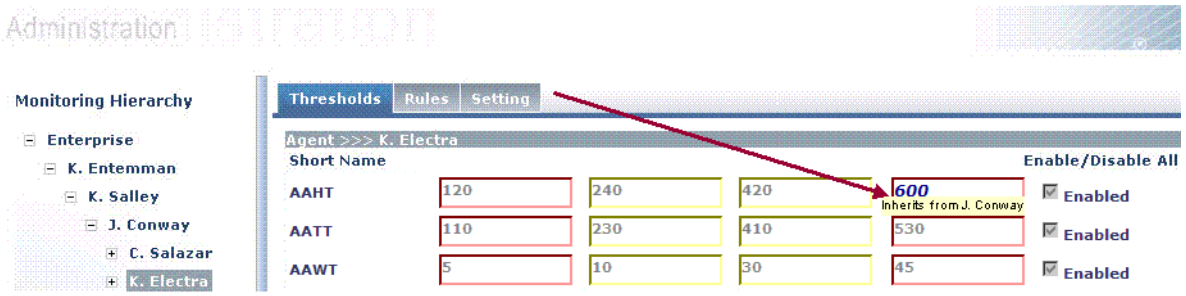


Figure 23: Type 3

This ToolTip (Figure 23 on page 35) shows that the `Electra/Electronics` node inherits its value of `600` from the override value stored at the `Conway` node

Type 4

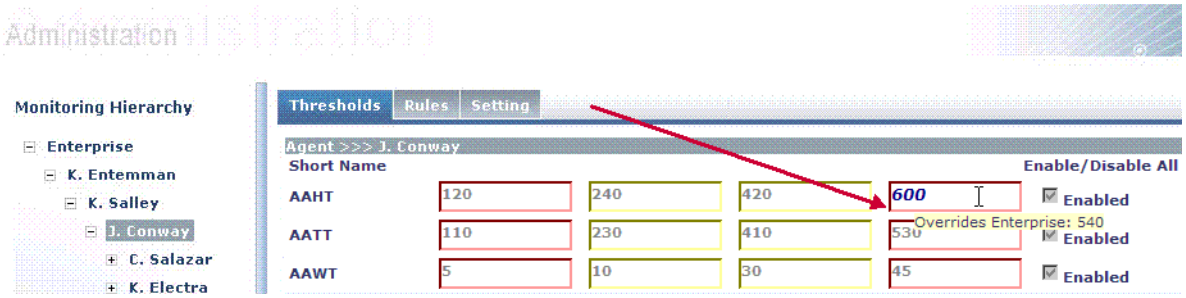


Figure 24: Type 4

This ToolTip (Figure 24 on page 35) shows that the `Conway` node overrides the value of `540` that would otherwise be inherited from the `Enterprise` node.

Expanding and Collapsing Hierarchies

To open the next level, single click the `Expand (+)` button. To close a single level, single click the `Collapse` (-) button.

Persistent Settings

Logging in to or out of any machine, or switching between tabs in the Genesys Advisors Browser retains the following settings:

- Monitoring Hierarchy expansions
- Selected level
- Last selected tab (module)

Accessing Help

To display the this document in PDF form, click the `Help` button.

Appendix

A Tailoring a Coaching Strategy

This appendix describes how to tailor a coaching strategy. It contains three sections:

You can to use the concepts explained in this section to tailor a coaching strategy. A coaching strategy can be modified at any time. In general, coaching strategies will do the following:

1. Set values according to types of groups.
2. Set values according to types of agents.
3. Provide a framework over time for continuous improvement.

Coaching Strategy Step 1

Consider our sample monitoring hierarchy (see the *Performance Management Advisor 8.0 Frontline Advisor System Administration Guide*) in which the very first level under `Enterprise`, groups the organization into `Sales` and `Service`.

In a case like this, the coaching strategy will set sales-oriented values at the `Sales` node and service-oriented values at the `Services` node. For example, agents who are selling are most likely expected to talk longer than agents who are delivering customer service.

This Step 1 approach continues throughout the monitoring hierarchy, using inheritance when situations are similar, and using overrides when situations are different.

For example, under the `Sales` group are `Consumer` and `Business` groups. These two groups are similar in some ways because the agents are selling, but they

are also different because one group sells to consumers and the other group sells to businesses.

Agents in both groups are selling and would probably be expected to perform the same number of holds and transfers. So the two groups would be set to inherit the hold and transfer thresholds from the `Sales` node. Wrap time for selling to consumers might take a shorter time than wrap time for businesses because the latter may include checking the balance in the business account. In this case, `Consumer` would have override values for `Wrap Time` different from the override values for `Wrap Time` in the `Business` group.

This Step 1 approach of setting values according to similarities and differences of groups continues all the way down the tree to the agents.

Coaching Strategy Step 2

In any given group, some agents will be new and some will be experienced. Step 2 uses inheritance and override values at the agent level to coach differently according to agent type.

For example, newer agents might be expected to talk a little longer than experienced agents, until the newer agents learn better call control, company policies, computer applications, and so on. Experienced agents know these things, so good coaching will challenge them with tighter override values to help them continue to improve

Step 2 uses inheritance and overrides at the per-agent level, enabling coaching by agent type.

Note: Sometimes Step 2 is required at the team level. For example, sometimes a “nest” is used to incubate new agents, while a “tiger team” is used to leverage the expertise of long-time, experienced agents. Step 2 would use inheritance and override at the team level in these cases, where teams are groups of agent types.

Coaching Strategy Step 3

Step 3 involves the improvement over time of Steps 1 and 2. Good coaching helps people get better over time by incremental improvements.

In Step 3 coaches tighten or loosen values over time to challenge agents and help them continually improve their performance.

Appendix

B Defining Your Monitoring Hierarchy

This appendix describes how to define a monitoring hierarchy. It contains the following sections:

Introduction

The sample monitoring hierarchy is used here to explain how to define and import the data representing a hierarchy. When you define your monitoring hierarchy, you will have this example to work from and guide you.

It is highly recommended that you produce a graphic of your hierarchy. Some hierarchies may be so large that this may not be possible but you should do it if you can. A graphic allows you to see the groups and monitors, as well as annotate the nodes with database IDs and other details that will make working with your hierarchy simpler and less prone to error. For more information on groups and monitors, see “Monitoring Hierachy Overview” on page 12.

The sample monitoring hierarchy (Figure 25 on page 40) displays both the groups and monitors in one graphic.

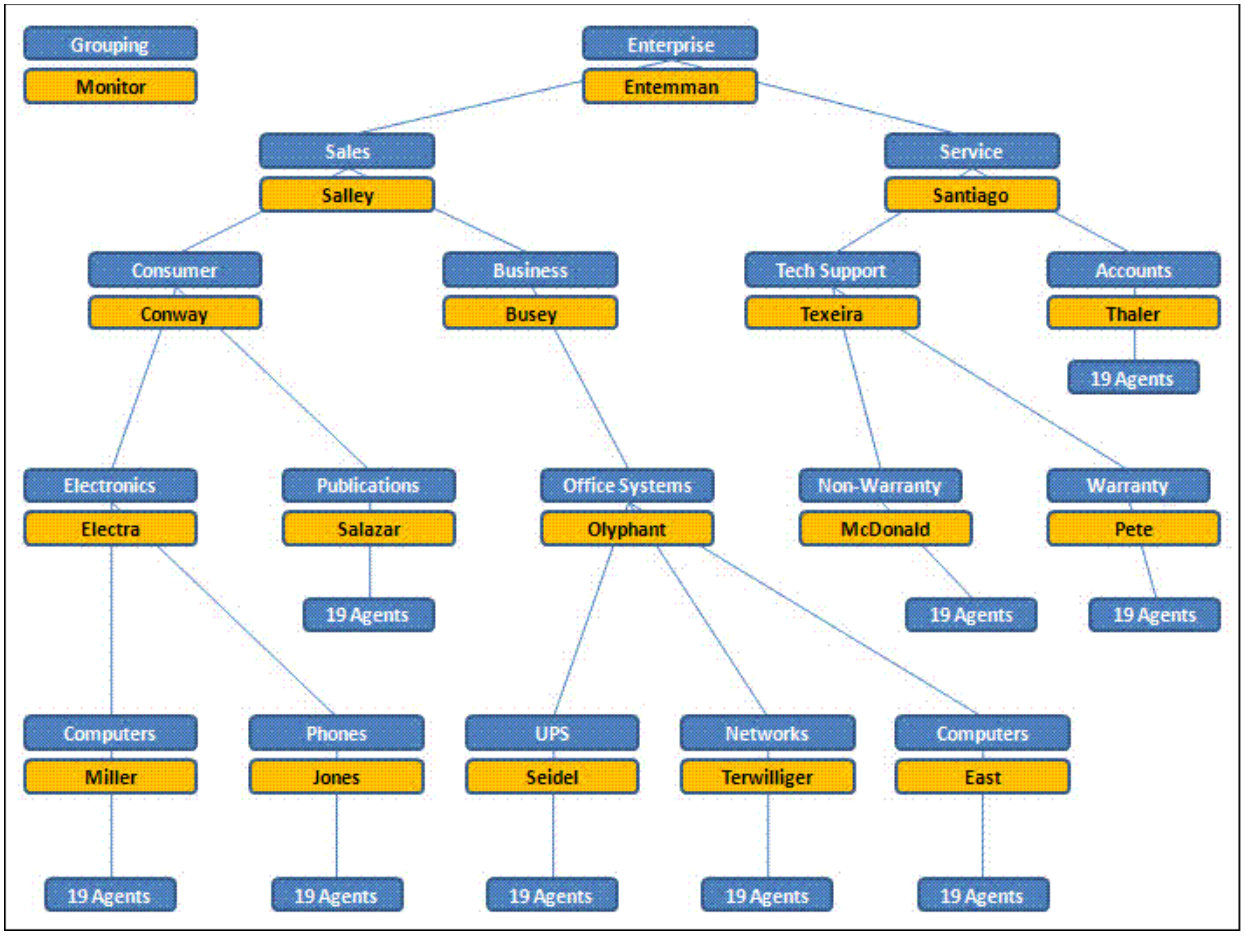


Figure 25: Sample Monitoring Hierarchy—Groups/Monitors

We use this graphic to explain how to define the hierarchy database for the sample monitoring hierarchy. Later, we will show how to build an even better graphic, once a successful import occurs and we know which IDs the system assigns.

The sample monitoring hierarchy has nine groups, each with nineteen agents. It is common in contact centers to refer to the first-level groups as “teams” which we do here.

The nine teams (that is, first-level groups) are:

- `Computers`
- `Phones`
- `UPS`
- `Networks`
- `Computers`
- `Publications`
- `Non-Warranty`

- Warranty
- Accounts

Note that groups are allowed to have the same name (for example, two groups named Computers), provided that you make sure the database IDs are unique IDs.

These nine teams appear at various levels in the hierarchy. This is an important concept: teams do not all have to be at the same level of the hierarchy. For instance, the Phones team is two levels below the Accounts team.

The sample monitoring hierarchy has more groups above the team groups. Computers and Phones are in the Electronics group. UPS, Networks, and the second Computers group are in the Office Systems group. Groups within groups continue up the tree, until the root node. The root node of the sample monitoring hierarchy is the Enterprise group.

Note: The monitoring hierarchy may be referred to as “tree.” Groups may be referred to as “nodes”.

In the sample monitoring hierarchy, there are nine groups that group agents, plus eight higher-level groups which define higher and higher groups all the way to the Enterprise group.

The hierarchy also defines the monitors. For simplicity, the sample monitoring hierarchy defines only one monitor per group.

As shown in Figure 26, each blue object is a group, and each orange object is a monitor. So, the person named Entemman monitors the Enterprise group, the person named Salley monitors the Sales group, the person named Electra monitors the Electronics group, and so on throughout the tree, with one person monitor for each group.

The next step is to define this organization so it can be successfully imported into Frontline Advisor.

The Hierarchy Database and Frontline Advisor

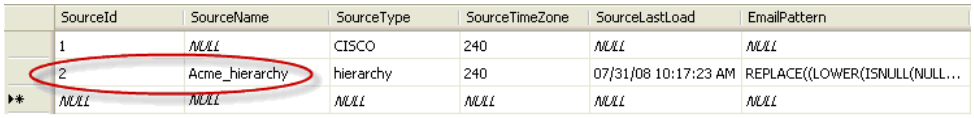
Before Frontline Advisor is started for the first time, you must define the monitoring hierarchy database and tell Frontline Advisor the name of the database. The location of the database must reside on the same database server as the Frontline Advisor database (see the *Performance Management Advisors 8.0 Frontline Advisor Deployment Guide*).

Frontline Advisor reads your monitoring hierachy database in one of three situations:

- The very first time Frontline Advisor is started

- Each time Frontline Advisor is restarted
- Once per day at the time you define (see *Performance Management Advisors 8.0 Frontline Advisor Deployment Guide*).

The FA installer will configure the `FA_DataSources` table automatically. See Figure 26, where the name of the sample monitoring hierarchy (named "Acme" in the sample screen below) has been defined to Frontline Advisor.



SourceId	SourceName	SourceType	SourceTimeZone	SourceLastLoad	EmailPattern
1	NULL	CISCO	240	NULL	NULL
2	Acme_hierarchy	hierarchy	240	07/31/08 10:17:23 AM	REPLACE((LOWER(ISNULL(NULL...
NULL	NULL	NULL	NULL	NULL	NULL

Figure 26: DataSources Table—SourceName

The default name of the hierarchy database is `_fadb_hierarchy`. This is the name you will see immediately after installation. You can create the hierarchy database with the same name or you can choose any other name and replace the value in the `DataSources` table accordingly. You can also change the hierarchy database name while installing Frontline Advisor.

The "empty" hierarchy database is defined during installation (see the *Performance Management Advisors 8.0 Frontline Advisor Deployment Guide)*. Your task is to populate the hierarchy database with the data that defines your monitoring hierarchy.

You can populate your hierarchy by running SQL scripts, or import it from spreadsheets, or use DTS, or whatever tools you are familiar with. The spreadsheet version of the sample monitoring hierarchy is included in the installation which you can use as an example.

The general steps to define your hiearchy are:

1. Define your ID scheme
2. Update your graphic.
3. Populate the `FA_HIER_Person` table.
4. Populate the `FA_HIER_Agent` table.
5. Populate the `FA_HIER_Team` table.
6. Populate the `FA_HIER_Agent_Team_Member` table.
7. Populate the `FA_HIER_Supervisor_Team` table.
8. Populate the `FA_HIER_Supervisor_Supervisor` table.

You must populate the data strictly in the order specified above.

Step 1—Define your ID scheme

To build and maintain your hierarchy database, it helps if you define a scheme for the IDs you will use. For example, you may choose IDs in the 8000 range for people, 9000 for groups, and so on.

Some aspects of your ID scheme are predefined so you need to know what those are. For example, you may want to use IDs in the range of 8000 for people, but you will import the people from your HR system, so you must use the HR IDs, not the 8000 range that you might prefer.

The following is the list of IDs (columns in various database tables) that you must either define yourself, or inherit as predefined from other systems:

- `AgentSkillID`—Each agent that logs into the ACD has this ID; it is a given and not definable by you. `AgentSkillID` is used to link call activities recorded in the call management system to each agent defined in Frontline Advisor. For example, `CISCO ICM SkillTargetID` is equivalent to `AgentSkillID`. For a Genesys Adapter installation—the `EmployeeID` defined in the Genesys Framework is equivalent to `AgentSkillID`.
- `PersonID`—Any person listed in your hierarchy—agent, supervisor or manager. This person must have a unique enterprise-wide ID. This is typically a badge ID, employee ID, or some other enterprise-wide unique ID that you may use for connection with other systems if necessary. `PersonID` is an alpha-numeric combination.
- `TeamID`—A unique ID that must be assigned to each group of agents. Each agent must belong to a team. If your source call management system does not have teams defined in it then the teams and their IDs must be defined by you.

The following is the ID scheme for the sample (Acme) monitoring hierarchy

- `AgentSkillID`—7000 range
- `PersonID`—8000 range
- `TeamID`—9000 range

Step 2—Update your graphic

Now that you have a better understanding of your ID scheme, you can update your graphic. This step will help tremendously as you populate your tables, and especially as you make changes and maintain your hierarchy database over time.

Figure 27 shows the sample monitoring hierarchy updated with the IDs.

You may not always be able to know as much about your hierarchy and produce such a good graphic but you should get as close as you can. It will always help to have a good graphic depiction of your hierarchy, and to write down as many IDs as you can.

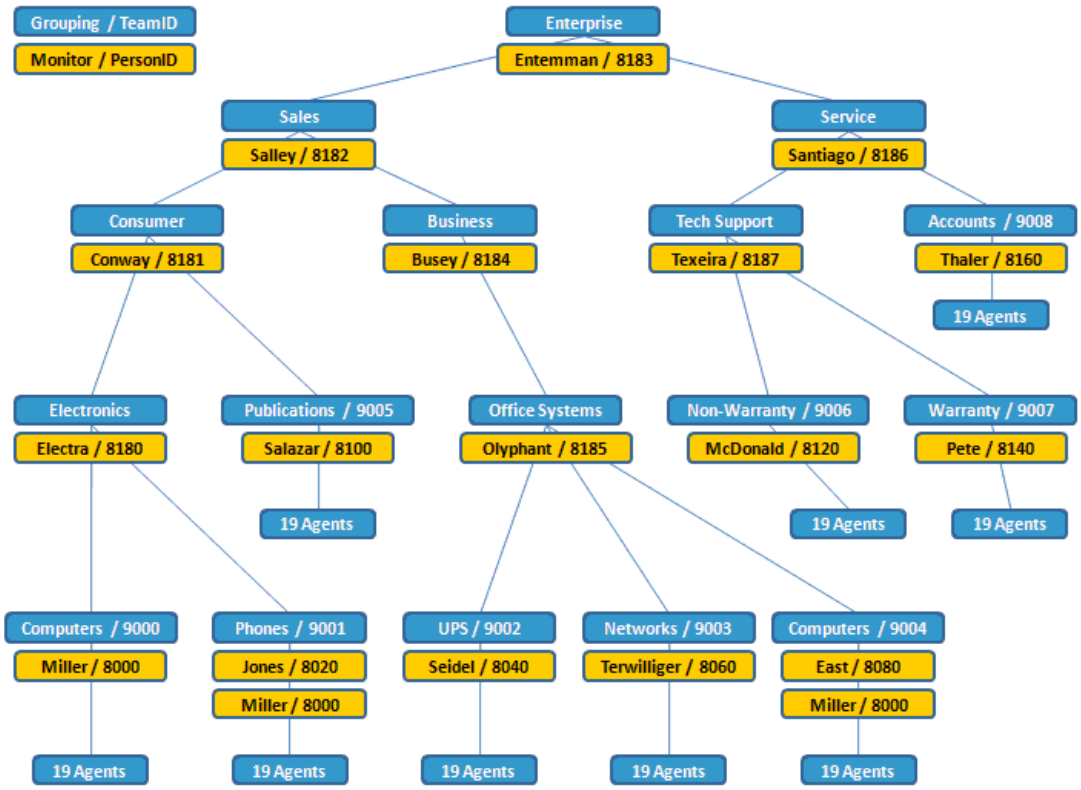


Figure 27: Acme Monitoring Hierarchy Updated with IDs

Step 3—Populate the FA_HIER_Person table

You must populate the `Person` table with the `PersonID`, `First Name`, `Last Name`, and `LoginName` for each person. The `LoginName` is the value that Frontline Advisor users use to log into the Genesys Advisors Browser.

The 188 people in the sample monitoring hierarchy are all in the 8000 range. People with PersonIDs in {8000, 8020, 8040, …, 8160} are the monitors of the nine teams. People with PersonIDs in {8180, 8181, …, 8187} are the monitors of the eight higher-level groups. All the other people are agents.

- Figure 28 on page 45 shows the `FA_HIER_Person` Table from the Acme Monitoring Hierarchy.

PersonID	Fname	Lname	LoginName
8000	Nancy	Miller	nmiller
8001	Kevi	Sherhouse	ksherhouse
8002	Alex	Feghhi	afeghhi
8003	S	Schiefelbein	sschiefelbein
8004	Andrew	Young	ayoung
8005	Lav	Hoerdemann	lhoerdemann
8006	Joanne	Math	jmath
8007	Brian	Ledder	bledder
8008	Georg	Guerrero	gguerrero
8009	Renne	Ballou	rballou
8010	Erik	Johnson	ejohnson
8011	Steven	White	swhite
8012	David	Duncan	dduncan
8013	David	Kang	dkang
8014	Chris	Wisinger	cwisinger
8015	Shawn	Shute	sshute
8016	Brande	Schoedl	bschoedl
8017	Bari	Reed	breed
8018	Bryan	Dunn	bdunn
8019	Ronnie	Ferrer	rferrer
8020	Ryan	Jones	rjones
8021	Graz	Gasparini	ggasparini
8022	Zulema	Pezzullo	zpezzullo
■ ■ ■			
8176	Carlos	Perez	cperez
8177	Kimberlee	Legaspi	klegaspi
8178	Kristian	Stubblefield	kstubblefield
8179	Christie	Vance	cvance
8180	Kyle	Electra	kelectra
8181	Jessica	Conway	tconway
8182	Ken	Salley	ksalley
8183	Kathy	Entemman	kentemman
8184	Rick	Busey	rbusey
8185	Sharon	Olyphant	solyphant
8186	Max	Santiago	msantiago
8187	Mia	Texeira	mtexeira
* NULL	NULL	NULL	NULL

Figure 28: FA_HIER_Person Table

Step 4—Populate the FA_HIER_Agent table

You must populate the `FA_HIER_Agent` table with all of the people who log into the ACD as agents. There are three columns in this table:

- `AgentSkillID`
- `PersonID`
- `SourceID`

There is most likely a way for you to export the list of agents from your ACD system. The only part you need to extract for your `Agent` table is the `AgentSkillIDs`.

You must match up the `AgentSkillIDs` with the `PersonIDs` from Step 3.

Lastly, you must put the SourceID that matches the ID of the source call management system specified in the DataSources table. This must match the ID of the entry for the hierarchy data source in the FA database's FA_DataSources table. By default, this value is 2.

Notes: It is not necessary for the IDs to "line up" the way they do in the sample monitoring hierarchy. This means that it is not required for each AgentSkillID to be exactly 1000 less than the PersonID. The sample monitoring hierarchy was generated from imported spreadsheets so it was possible to control the ID scheme. Your environment will almost never allow this sort of simplification. The Agent table in the sample monitoring hierarchy includes the monitors of the first-level groups of agents. Essentially, these are the supervisors of the nine teams. Supervisors often have ACD logins in contact centers, therefore they appear in the list you get from the ACD. However, contact centers almost never want the supervisor metrics to interfere with the calculation of team averages. So in this case, you will include supervisors in the Agent table but you will not include supervisors in the Agent_Team_Member table (see Step 6).

Step 5—Populate the FA_HIER_Team table

For each first-level group of agent, you must populate the FA_HIER_Team table with:

- TeamID
- EnterpriseName
- PriSupervisorPersonID
- SourceID

The TeamID comes from your ID scheme, as annotated in your updated graphic. Note that TeamIDs only exist for first-level groups of agents. Higher-level groups do not have TeamIDs.

The EnterpriseName is the name for each group that appears in the Frontline Advisor user interface for the groups.

PriSupervisorPersonID is the PersonID of the primary monitor of each group. In this release, there can only be one primary monitor of a group, and any number of secondary monitors (also called 'backup supervisors').

The SourceID is the same as the one listed for your database.

As shown in Figure 27, the sample monitoring hierarchy has nine groups otherwise known as teams. They have TeamIDs = {9000, 9001, …, 9008}. There is one monitor defined for each of those groups, and they have PersonIDs = {8000, 8020, 8040, …, 8160}. The EnterpriseName of each group is shown as well.

Now you can see some of the value of the annotated graphical representation of your hierarchy. Figure 29 shows the `Team` table for the sample monitoring hierarchy. You can see the data is much easier to define if you compare the graphic to the table.

	TeamID	EnterpriseName	PriSupervisorPersonID	SourceID
▶	9000	Computers	8000	2
	9001	Phones	8020	2
	9002	UPS	8040	2
	9003	Networks	8060	2
	9004	Computers	8080	2
	9005	Publications	8100	2
	9006	NonWarranty	8120	2
	9007	Warranty	8140	2
	9008	Accounts	8160	2
*	*NULL*	*NULL*	*NULL*	*NULL*

Figure 29: FA_HIER_Team Table

If you experience problems when importing your hierarchy, you should refer back to the information on your annotated graphic and double check the accuracy of the `FA_HIER_Team` table.

Step 6—Populate the FA_HIER_Agent_Team_Member Table

You must populate the `TeamId`, `AgentSkillId`, and `SourceId` for each agent. Although the column names are not capitalized the same as the other tables, the values are the same as `TeamID` in the `FA_HIER_Team` table, the `AgentSkillID` in the `FA_HIER_Agent` table, and the `SourceId` in the `DataSource` table.

Essentially, you must define which groups contain which agents in this table.

In the sample monitoring hierarchy:

- `TeamID = 9000` has `AgentSkillID = {7001, 7002, 7003, . . ., 7019}`
- `Team ID = 9001` has `AgentSkillID = {7021, 7022, 7023, . . ., 7039}`, and so on, for each of the nine teams.

Again, because this database was generated from spreadsheets, the ID scheme is a lot cleaner than the one you must build.

Each `AgentSkillID` can be related to only one `TeamID`. If the same person potentially can belong to several teams then there will be as many separate entries of this person ID and different `AgentSkillIDs` in the `FA_HIER_Agent` table as there are teams the agent can belong to. This person's point-in-time team membership depends on what `AgentSkillID` is used to log in to the ACD.

Figure 30 on page 48 shows the `FA_HIER_Agent_Team_Member` table for the sample monitoring hierarchy.

	TeamId	AgentSkillId	SourceId
▶	9000	7001	2
	9000	7002	2
	9000	7003	2
	9000	7004	2
	9000	7005	2
	9000	7006	2
	9000	7007	2
	9000	7008	2
	9000	7009	2
	9000	7010	2
	9000	7011	2
	9000	7012	2
	9000	7013	2
	9000	7014	2
	9000	7015	2
	9000	7016	2
	9000	7017	2
	9000	7018	2
	9000	7019	2
	9001	7021	2
	9001	7022	2
	9001	7023	2

■ ■ ■

	9008	7168	2
	9008	7169	2
	9008	7170	2
	9008	7171	2
	9008	7172	2
	9008	7173	2
	9008	7174	2
	9008	7175	2
	9008	7176	2
	9008	7177	2
	9008	7178	2
	9008	7179	2
*	*NULL*	*NULL*	*NULL*

Figure 30: FA_HIER_Agent_Team_Member Table

As noted in Step 4, supervisors can be defined on their own teams (if they make calls), but they display in the hierarchy under themselves and are often not logged in. If supervisors almost never take calls, leave them out of the definition of their own teams. If you do include them on their own teams, and they log into the ACD and take/make phone calls, then their metrics will be included in their team averages. This is almost never required in contact

centers. Therefore, in the sample monitoring hierarchy, supervisors are not included in the definitions of team membership.

Step 7—Populate the FA_HIER_Supervisor_Team Table

You must populate the `TeamId`, `SupervisorPersonId`, and `SourceId` for each first-level group of agents. Again, the column names are not capitalized the same, but they are the same ID keys from the other tables you have populated so far.

This table is where you map monitors to groups. You only need to do this for the groups of agents; these are usually referred to as teams. The monitors of teams are usually referred to as supervisors. So this step is to map supervisors to teams.

It is possible to assign more than one supervisor to a team. The sample monitoring hierarchy does not do this, to keep things simpler.

To populate the `FA_HIER_Supervisor_Team` table, refer to your annotated graphic. You must define pairings of `TeamIDs` and `PersonIDs` where `PersonID` is the ID of the primary or a backup supervisor for the team.

Note: The entry of the primary supervisor - team pair in this table is not mandatory. The table may contain all supervisors for each team or just backup supervisors if there are any.

Figure 31 shows the `FA_HIER_Supervisor_Team` Table for the sample monitoring hierarchy.

	TeamId	SupervisorPersonId	SourceId
▶	9000	8000	2
	9001	8000	2
	9001	8020	2
	9002	8040	2
	9003	8060	2
	9004	8000	2
	9004	8080	2
	9005	8100	2
	9006	8120	2
	9007	8140	2
	9008	8160	2
*	NULL	NULL	NULL

Figure 31: FA_HIER_Supervisor_Team Table

Step 8—Populate the FA_HIER_Supervisor_Supervisor Table

You must populate the `SupervisorPersonID` and `BossPersonID` for each hierarchical relationship of monitors in your hierarchy.

In this step, you are essentially defining the structure of all the levels that are above the first-level of groups. You will again need your annotated graphic to perform this step more easily and accurately.

It was mentioned previously that a person can be a monitor of more than one group. However, a person that is a monitor can only have one “boss” so this table only allows one-to-one child-to-parent relationships. A parent may have more than one child, but a child has one-and-only-one parent.

Figure 32 shows the FA_HIER_Supervisor_Supervisor table for the sample monitoring hierarchy.

	SupervisorPersonId	BossPersonId
▶	8000	8180
	8020	8180
	8040	8185
	8060	8185
	8080	8185
	8100	8181
	8120	8187
	8140	8187
	8160	8186
	8180	8181
	8181	8182
	8182	8183
	8184	8182
	8185	8184
	8186	8183
	8187	8186
*	NULL	NULL

Figure 32: FA_HIER_Supervisor_Supervisor Table

You can again see the value of the annotated graphic in defining this table. If you have any problems importing your hierarchy, or if your hierarchy appears to have missing nodes in the user interface, be sure to double-check your graphic then double-check the accuracy of this table.

Maintaining Your Hierarchy

The steps explained here help you to define the first version of your hierarchy database. There is no doubt that your hierarchy will need to be modified over time. The absolute best way to do this is to use your annotated graphic. Update the graphic before making your changes so you can have a better picture of what you need to do.

For vast, wholesale changes, there are database scripts you must run first, and some other steps too, that are outside the scope of this document. You can contact your Advisors Technical Support Team for more information and help.

Appendix

C Sample Monitoring Hierachy

This appendix describes a sample monitoring hierarchy. It contains two sections:

The sample monitoring hierarchy has nine teams of nineteen agents in a five-level hierarchy (Figure 33 on page 52).

Groupings

Figure 33 on page 52 shows a hierarchy of groupings.

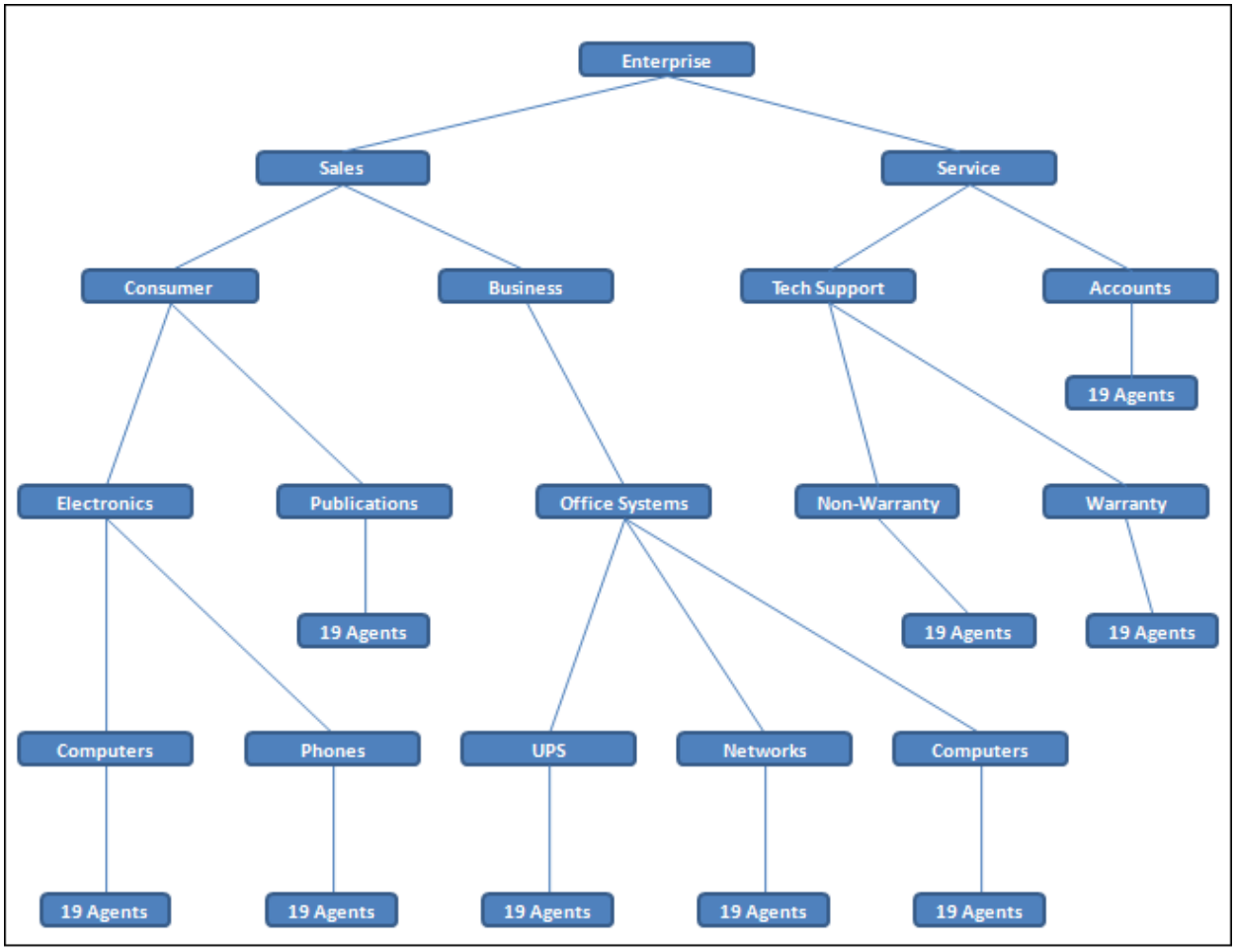


Figure 33: Sample Monitoring Hierarchy

The nodes labeled *19 Agents* each represent a group of 19 real agents.

Monitors

Monitoring information defines which people can monitor which teams in Frontline Advisor. Figure 34 on page 53 displays the monitoring information combined with the group information.

The sample monitoring hierarchy defines one monitor (person) for each node in the tree: one person monitors the `Phones` node, one person monitors the `Electronics` node, one person monitors the `Consumer` node, and so on. One person (monitor) for each node in the tree.

The person with the last name `Conway` is a monitor of the `Consumer` node. This implies that `Conway` can monitor all of the teams in the `Consumer` subtree, which consist of the 19 agents on the `Computers` team, the 19 agents on the `Phones` team, and the 19 agents on the `Publications` team.

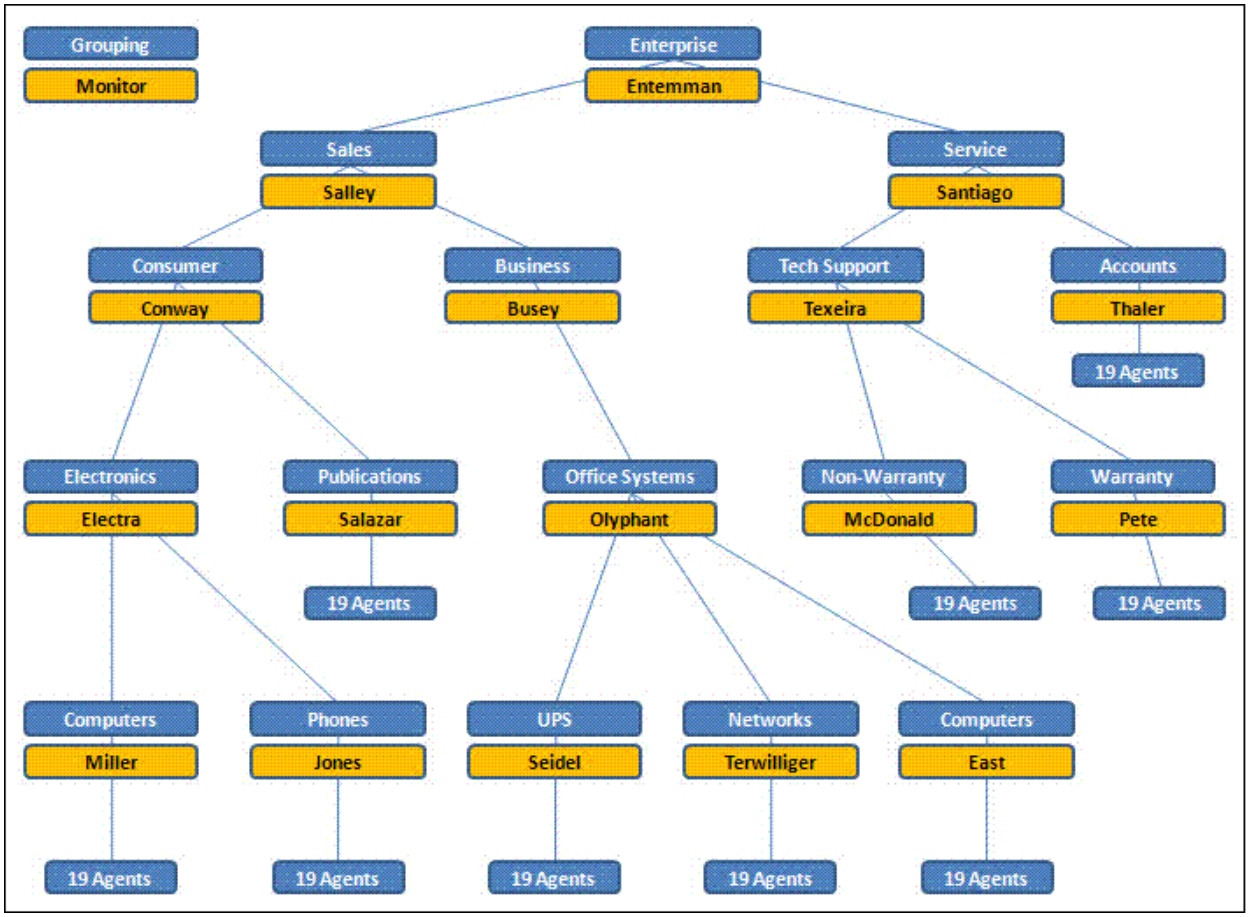


Figure 34: Monitoring Hierarchy

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 configure your enterprise hierarchy and set up threshold rules/goals and users.
- *Performance Management Advisors 8.0 Contact Center Advisor User's Guide* describes how to personalize your display of information for monitoring and root cause analysis.
- *Performance Management Advisors 8.0 Workforce Advisor User's Guide* describes how to personalize your display of information for monitoring and root cause analysis.
- *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 Advisor 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 the actions taken to resolve alerts and use the database to learn and repeat successes.
- *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 personalize your display of information for monitoring.
- *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 4 describes and illustrates the type conventions that are used in this document.

Table 4: 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 59).	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 4: 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>`

Index

Symbols

A

B

C

D

E

F

H

I

L

M

N

O

R

S

T

V

W