Performance Management Advisors 8.0

Frontline Advisor

Manager User’s Guide

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Preface

Welcome to the Genesys *Performance Management Advisors 8.0 Frontline Advisor Manager User's Guide*. This document describes how to use the agent management features of Frontline Advisor to track, measure and optimize agent performance and build coaching strategies for performance improvement.

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 33.

About Frontline Advisor

Frontline Advisor improves both agent performance and customer satisfaction by giving agents, supervisors and managers a real-time view of agent activity. Customizable alerts draw immediate attention to agents who need coaching and enable supervisors to more effectively manage results and performance-related activity, good, or otherwise.

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

Current status, performance, behavioral or activity-based data can be presented in customized views. Sophisticated, configurable business rules monitor key performance indicators and then notify supervisors of situations requiring immediate attention.

The alert activity in Frontline Advisor and Agent Advisor makes agent activity trends more obvious, without requiring supervisors to be screen-watchers. It increases efficiency so supervisors have more time to spend with their agents.

Intended Audience

This document is primarily intended for managers and supervisors of contact center agents. 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

This chapter describes how managers can use Frontline Advisor to view agent activity and alerts in real time and make appropriate responses. It contains the following sections:

Overview

Frontline Advisor is designed to help supervisors and managers raise the performance of agents, allowing them to instantly identify activities that need correction or additional training, as well as areas where agents are performing optimally.

Manager Console

The Manager Console is divided into four panes:

- `Monitoring Hierarchy` view—Contains the groups and monitors in your monitoring hierarchy.
- `Teams` view—The agents' overall status activity in real time
- `Agent Alerts` view—The details of the alerts for a selected agent
- `Team Alerts` view—The details of the alerts for all agents on the selected team.

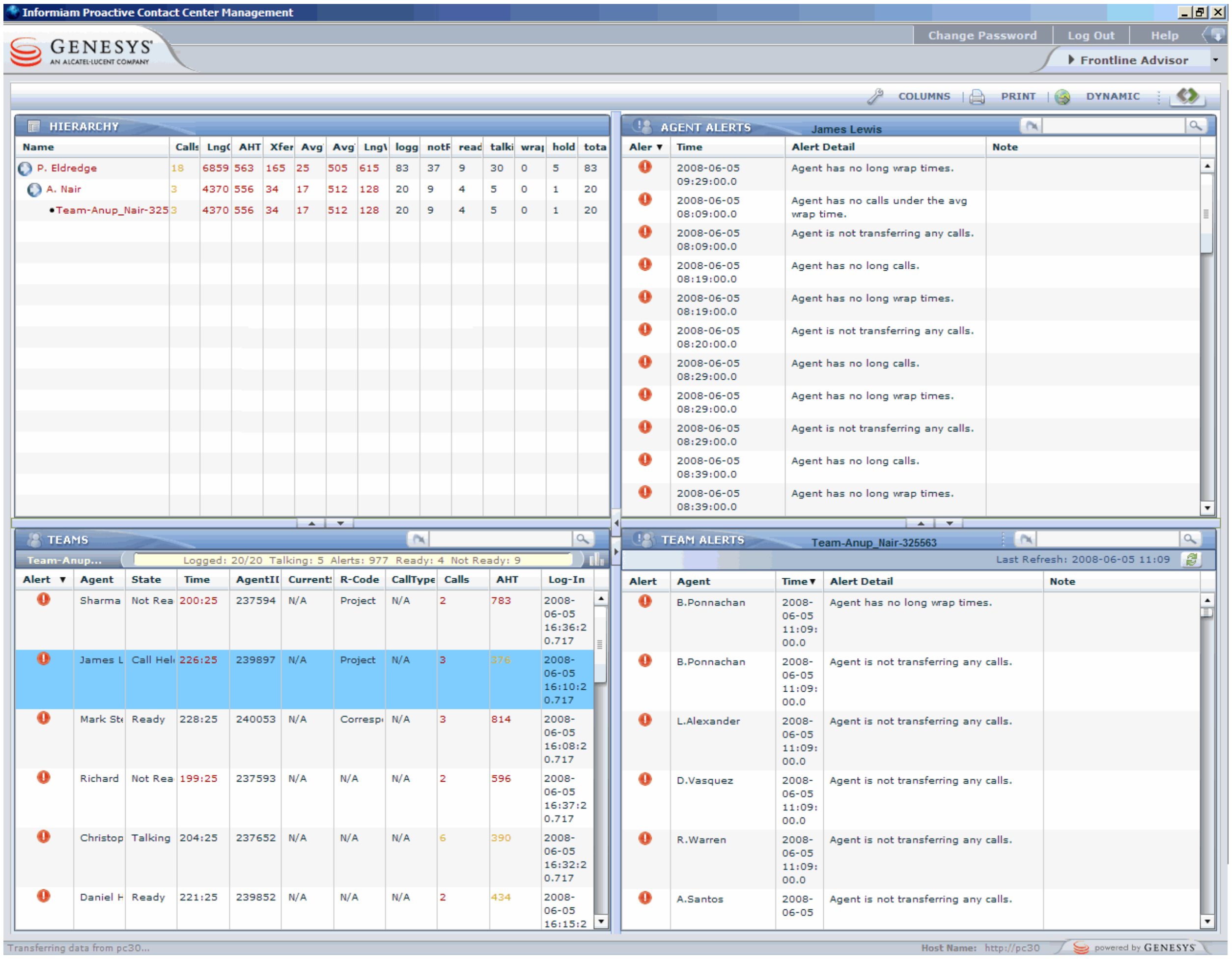

Figure 1: Manager Console

Monitoring Hierarchy

The Monitoring Hierarchy (see Figure 2 on page 13) contains the groups and monitors in your monitoring hierarchy, that is, the managers, supervisors, and teams who report to you as indicated in your monitoring hierarchy, plus your direct manager.

The Hierarchy view displays both primary teams as well as backup teams. The rolled up metric values for supervisors only come from the primary team and not from the backup teams. The backup teams are only present in the Monitoring Hierarchy view for display purposes.

The count of uncleared alerts (that is, triggered rules) roll up through all levels of the monitoring hierarchy.

Selecting Teams of Agents to Monitor

To monitor one or more teams of agents, select teams from the `Hierarchy` view.

To display primary and backup teams in the `Teams` view, select a supervisor. In the hierarchy view, the primary teams are represented by a yellow icon and the backup teams are represented by a blue icon.. The primary teams are displayed before the backup teams.

Note that only primary teams, not backup teams, contribute to the rolled up metric values of supervisors.

HIERARCHY

Name	Logged	Ready	Talking
J. Supervisor_Level46027 421405	1001	1001	0
J. Supervisor_Level36023 421405	1001	1001	0
J. Supervisor_Level26003 105300	250	250	0
J. Supervisor5003 4220	10	10	0
1 2100	5	5	0
2 2120	5	5	0
3 2100	5	5	0
4 2100	5	5	0
J. Supervisor5004	0	0	0
J. Supervisor5005 4200	10	10	0
J. Supervisor5006	0	0	0
J. Supervisor5007 4220	10	10	0
J. Supervisor5008	0	0	0
J. Supervisor5009 4200	10	10	0
J. Supervisor5010	0	0	0
J. Supervisor5011 4200	10	10	0

Figure 2: Hierarchy View

How Frontline Advisor Monitors Agents

Thresholds, Rules and Metrics

Thresholds and rules are defined in the Administration Console by users with the admin role. Thresholds define the critical, warning, and acceptable conditions for each metric. Thresholds and rules can be used to find positive behavior as well.

Default values are provided on installation; however, they can be inherited or overridden. When modified at the global level, the values for all enabled teams and agents are automatically updated. For more information on inheritance, see “Sample Monitoring Hierachy” on page 29.

In addition to performance information, Frontline Advisor tracks and records all exceptions and allows supervisors to enter notes and coaching information to support positive and negative feedback. Supervisors describe their actions for dealing with the alert in a note. The note becomes part of the recorded history of the agent.

Thresholds

Depending on the metric, a value may be acceptable above or below a certain value. Some rules trigger an alert if the value is below or above defined values, as shown in Table 1 on page 14.

Table 1: 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).

The four text boxes are colored to provide a visual cue for the status (Figure 3). Red indicates a critical value range. Yellow indicates a warning value range. No color indicates an acceptable value range.

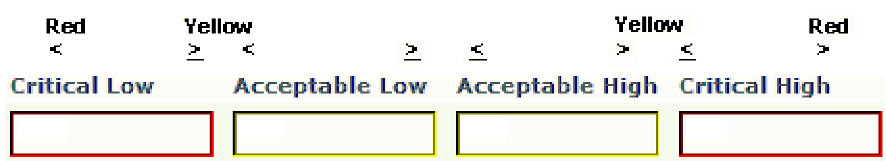

Figure 3: Threshold bar

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 but less than two calls 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 4)

Figure 4: Threshold Acceptable Between Two Values

Example 2 In the example in Figure 5, 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 5: Threshold Without a High Yellow Warning

Example 3 In the example in Figure 6, 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).

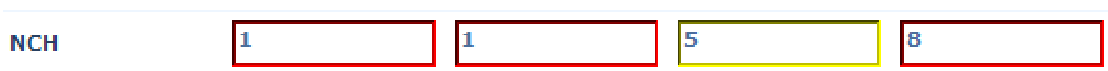

Figure 6: Threshold Without a Low Yellow Warning

Rules

Rules are conditions that continuously monitor statistics. For example, an agent has more than 10 agent calls transferred in the past 10 minutes. Once a rule is triggered, an alert is generated. Alerts help to focus your attention on the most important issues affecting performance. Rules also count events throughout an interval of time, which allows them to trigger on the frequency of events. The frequency of an alert is a leading indicator of good or bad trends. It is good practice to learn to make use of alerts to quickly focus on where to take action now.

A threshold compares a measured value at a point in time to a threshold range to determine the status. Rules evaluate and trigger on agent metrics, but not for team metrics.

The 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. The rules could be changed to tighten the triggering numbers in a future week (to "raise the bar") or, once good performance is achieved, new rules could be defined to move to new areas of performance. See also, “Tailoring a Coaching Strategy” on page 27.

Types of Threshold and Rule

The five types of thresholds and rules are:

Table 2: Types of Threshold and Rule

Class	Explanation	Action
Threshold	Based on a count	Change text red or yellow
Threshold	Based on an average or maximum time value	Change text red or yellow
Threshold	Based on the duration of an agent’s state	Change text red or yellow
Rule	Based on the frequency of calls held or calls transferred	Issue a red alert
Rule	Based on the frequency of (long or short) call durations or wrap times	Issue a red alert

Red indicates at least one critical alert.

Green indicates that no alerts are active: the value is normal.

In addition, a gray icon indicates the agent is not logged into the ACD.

The Team View

The Team view (Figure 7 on page 17) is where you can focus on your overall status in real time. Primary teams display before backup teams.

The state data is updated and refreshed by default every 10 seconds. The performance data is updated and refreshed by default every 10 minutes. The refresh rate is configured in the Administration module. Some default columns include:

- `Alert`—The agent’s current alert state is indicated by a colored icon. In addition to red and green, a gray icon indicates the agent is not logged into the ACD.
- `Agent`—The first initial and last name
- `State`—The agent’s current state, including:

- `Not Monitored`
- `Monitored`
- `Logged On,`
- `On Hook`
- `Call Conferenced`
- `Call Dialing,`
- `Talking`
- `Call Internal`
- `Call Outbound,`
- `Call Held`
- `Call Initiated`
- `Call Unknown,`
- `Not Ready`
- `Off Hook`
- `Ready`
- `Logged Off`
- `After Call Work`
- `Agent Work Not Ready`

- `Time`—The amount of time that the agent has been in the current state (minutes:seconds)
- `R-Code`—A code indicating the reason for the agent's most recent change of state
- `Agent ID`—The agent's identification.
  Select the team you want to monitor by clicking and selecting one (Figure 7).

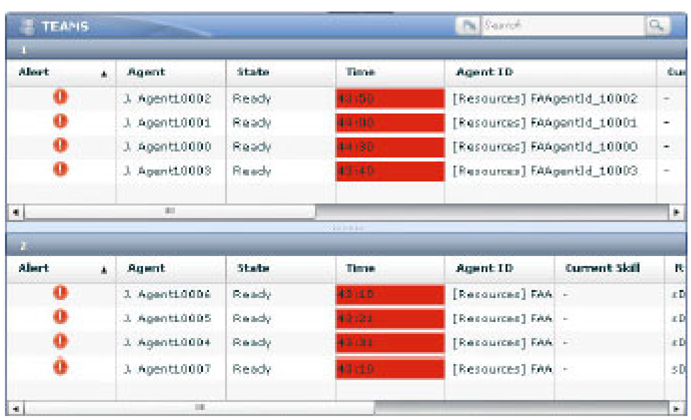

Figure 7: The Team View

Agent Alerts

The details of uncleared agent alerts are displayed in the `Agent Alerts` view (Figure 8). Display the alerts for an agent by selecting their name in the `Team` view. The agent's name displays beside the `Agent Alerts` view. The visible alerts are those generated on the current day since 12:00 a.m. A procedure runs according to the Performance Calculation Interval set in the administration module by the admin user and moves violations that are older than 24 hours to a violations archive table. Hence at any given time the violations that appear in this panel are violations generated in the current day since 12:00 a.m.

The details of the `Agent Alerts` view include:

- `Alert`—The alert's status (red).
- `Time`—The time when the alert was triggered on the current day (`hh:mm:ss`).
- `Alert Detail`—The rule description.
- `Note`—A note for the alert from the supervisor.

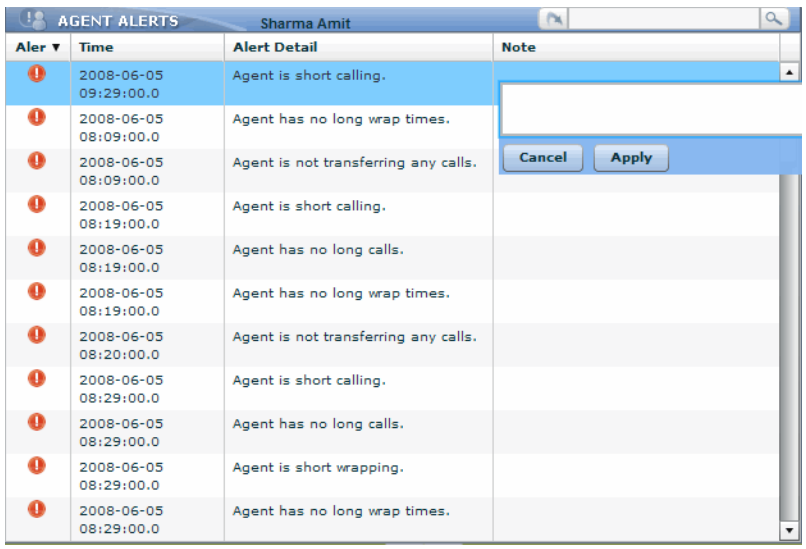

Figure 8: Agent Alerts

Clearing Alerts by Saving a Note

You can clear one or more alerts quickly and easily by applying notes on each alert. Once cleared, the note can be viewed in the `Team Alerts` view and becomes part of the agent's performance history. The alerts are cleared on a 24-hour rolling window. At any given time the alerts displayed are the alerts generated generated in the current day since 12:00 a.m. Alerts older than 24 hours are stored in the history. (A procedure runs according to the Performance Calculation Interval set by the admin user and moves violations that are older than 24 hours to the history in a violations archive table.) Although alerts older than 24 hours do not display in the `Agent Alerts` and `Team Alerts` views, those alerts and notes are in the database history.

Clear an alert by saving a note by clicking in the `Notes` field, typing text, and clicking `Apply`. You can only type one comment per alert. The alert icon is replaced by a green icon and the status is cleared. To save the notes to the database, click `Apply`.

Navigating away from the note without clicking Apply will not clear the alert. If another supervisor saves a note as you are typing yours for the same rule violation, your notes will overwrite the other supervisor's notes.

Team Alerts

The details of alerts for all agents on the selected team are displayed in the Team Alerts view (Figure 9). The team's name displays beside the Team Alerts tab. The alerts are for the generated in the current day since 12:00 a.m and default to reverse chronological order. You cannot view alerts from arlier than the previous 24 hours; however, they are stored for the ability to do alert reporting in a future release.

The details of the Team Alerts view include:

- Alert—Your alert state is indicated by the color of the icon (red or yellow).
- Agent—Your first initial and last name if you have had any alerts in the previous 24 hours.
- Time—The time when the alert was triggered on the current day (hh:mm:ss).
- Alert Detail—Explanatory text describing what situation triggered the alert.
- Note—The text a supervisor provides for the alert

Update the list by clicking the Refresh button. The date and time of the last refresh display next to the Refresh button.

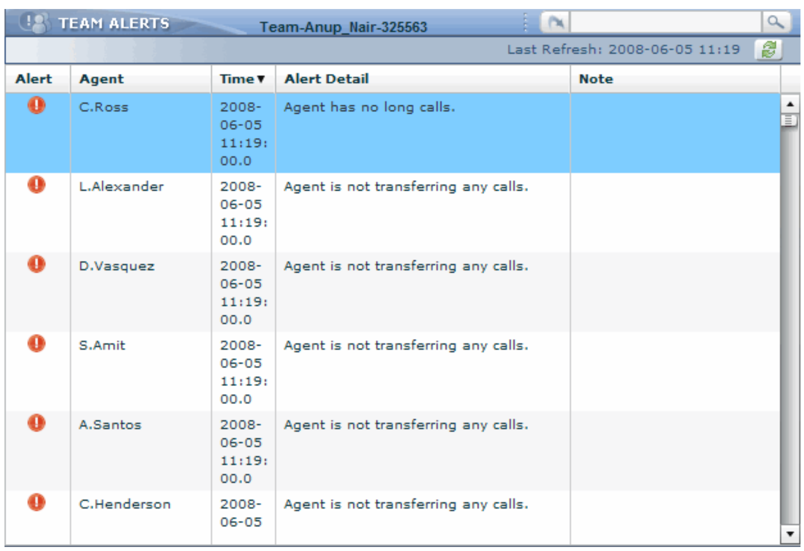

Figure 9: Team Alerts View

Printing the Current View

The report is generated as a PDF file. So, when you click the `Print` button on the dashboard the PDF file is generated. One of the following happens:

1. If your machine has a default PDF Viewer (like Acrobat Reader), the data will appear in the PDF Viewer. You can then save or print the document using the PDF Viewer.
2. If your machine does not have a default PDF Viewer, an `Opening FA.pdf` window will appear. You can then select to open the PDF document with a PDF Viewer application or save the PDF file on the disk.

Details of the printout include:

- The `Hierarchy View` section
- The `Teams View` section
- The `Agent Alerts View` section
- The `Team Alerts View` section

The PDF document will display all the data that is currently displayed on the dashboard. in separate sections mentioned above.The details of the printout do not include the values in columns that are not displayed on the Dashboard.

Opening a Defined URL

You can open a web site that the administrator has defined, by clicking the dynamic link button. This button has a ToolTip called `Link Out`.

User Status Window

You can display the User Status window to monitor the status of alerts while Frontline Advisor runs in the background. When a rule violation is triggered, the icon becomes red. You may want to keep the User Status button on your desktop, then if/when it changes color, open Frontline Advisor (Figure 1 on page 12) to see the details.

Customizing the Display

Choosing Metric Columns

You can select which of the optional state, performance and hierarchy metrics are displayed.

State Metrics

The state metrics include:

- `CurrentState (state)`

- `LoginTime (loginT)`
- `TimeInCurrentState (stateT)`
- `ReasonCode (rcode)`

The following two state metrics work only when Frontline Adviosr is configured with a Cisco Adapter, and not with a Genesys Adapter:

- `Call Type`
- `Current Skill`

Performance–Voice Metrics

The performance metrics include:

- `CallsHandled (nch)`
- `CallsTransferred (nct)`
- `LongestTalkTime (ltt)`
- `LongestWrapTime (lacw)`
- `AverageHandleTime (aht)`
- `AverageTalkTime (att)`
- `AverageWrapTime (aacw)`

Performance–Web Chat Metrics

Web chat metrics work only when Frontline Advisor is configured with a Genesys Adapter.

Although they are available for selection from the Dashboard when Frontline Advisor is configured with a Cisco Adapter, they will *not* function in this configuration.

Web chat metrics include:

- `ChatInProcess (wInProc)`
- `ChatAccepted (wAcpt)`
- `ChatRejected (wRjct)`
- `ChatPercentageRejected(wRjctPct)`
- `ChatTimedOut (wTO)`
- `ChatPercentageTimedOut (wTOPct)`
- `ChatTransferred (wTxfrs)`
- `ChatHandled (wH)`
- `ChatOffered(wOffered)`
- `ChatHandleTime(wHT)`
- `ChatAverageHandleTime(wAHT)`

Performance–E-mail Metrics

E-mail metrics work only when Frontline Advisor is configured with a Genesys Adapter.

Although they are available for selection from the Dashboard when Frontline Advisor is configured with a Cisco Adapter, they will *not* function in this configuration.

E-mail metrics include:

- `EmailInProcess (eInProc)`
- `EmailAccepted (eAcpt)`
- `EmailRejected (eRjct)`
- `EmailPercentageRejected (eRjctPct)`
- `EmailTimedOut (eTO)`
- `EmailPercentageTimedOut (eTOPct)`
- `EmailTransferred (eTxfrs)`
- `EmailHandled (eH)`
- `EmailOffered (eOffered)`
- `EmailHandleTime (eHT)`
- `EmailAverageHandleTime (eAHT)`

Hierarchy Metrics

The hierarchy metrics include:

- `Calls`
- `LngCall`
- `AHT`
- `Xfer`
- `AvgWrap`
- `AvgTalk`
- `LngWrap`

- `Logged`
- `Not Ready`
- `Ready`
- `Talking`
- `Wrap`
- `Hold`
- `Total`
- `ChatInProcess (wInProc)`
- `ChatAccepted (wAcpt)`
- `ChatRejected (wRjct)`
- `ChatPercentageRejected (wRjctPct)`
- `ChatTimedOut (wTO)`
- `ChatPercentageTimedOut (wTOPct)`
- `ChatTransferred (wTxfrs)`
- `ChatHandled (wH)`
- `ChatOffered (wOffered)`
- `ChatHandleTime (wHT)`
- `ChatAverageHandleTime(wAHT)`
- `EmailInProcess (eInProc)`
- `EmailAccepted (eAcpt)`
- `EmailRejected (eRjct)`
- `EmailPercentageRejected (eRjctPct)`
- `EmailTimedOut (eTO)`
- `EmailPercentageTimedOut (eTOPct)`
- `EmailTransferred (eTxfrs)`
- `EmailHandled (eH)`
- `EmailOffered (eOffered)`
- `EmailHandleTime (eHT)`
- `EmailAverageHandleTime (eAHT)`

Procedure:
Choosing columns to display

Start of procedure

1. Click the `Columns` button. The column chooser is then displayed.

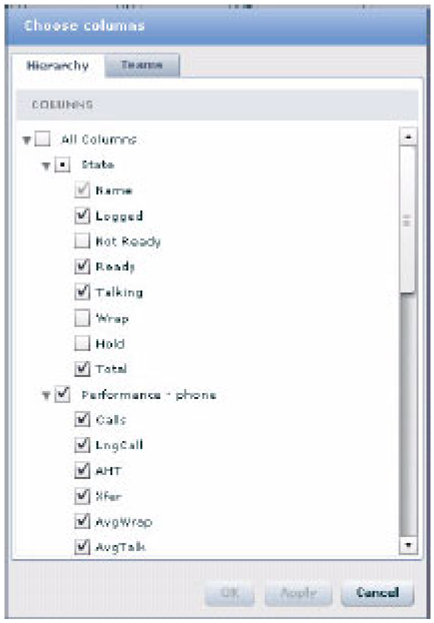

Figure 10: Column Configurator

2. For the selected columns to display for all teams, on the `Teams` tab, select the `All Teams` check box.
   For the selected columns to display for only the current team, clear the `All Teams` check box and select a particular team.
3. Select check boxes.
   Include all agent states or performance metrics by selecting the `State` or `Performance` check box.
   Exclude agent states or performance metrics by clearing check boxes.
   Exclude all agent states or performance metrics by clearing the `State` or `Performance` check box.
4. Select the `Hierarchy` tab to select hierarchy metrics.
   Include all hierarchy metrics by selecting the `All Columns` check box. .
5. Click `Apply`. The selected columns in the `Hierarchy` pane display in the `Hierarchy` view. The selected columns in the `Teams` pane display in the `Teams` view.

End of procedure

To close the Column Chooser without changing the columns, click `Cancel`.

Ordering the Metrics

You can change the order the metrics display by dragging a column heading to another location in the view. The default columns always display to the left of the optional columns. You cannot hide the default columns.

Sorting the Views

You can sort a view by clicking a column heading. You can sort the view in ascending or descending order. Sorting by the `Alerts` column is a great way to see all red alerts first. A sort triangle indicates the direction. The sorting persists if you either select another team or log out and back in.

Adjusting the Width of Columns

If one or more columns are selected to, or removed from, display, the width of the columns adjusts accordingly. There is a minimal default width. Adjust the width of individual columns, by dragging the pointer when it changes to a near the column break.

Resizing the Views

You can resize the height of each view by dragging the splitter up or down.

Searching

You can search for:

- Supervisor and agent names in the `Teams` view.
- Alert details and notes in the `Agent Alerts` view.
- Agent name, alert details, and notes in the `Team Alerts` view

To search, type your search text in the `Search` field and click . Searching finds the next occurrence of the search text from the current cursor location and highlights it.

To find the next occurrence, click again. Search continues from the current location and wraps around the end to the beginning.

To clear the `Search` field, click .

Persistent Settings

Logging out and in (to any machine) or returning from another module in the Genesys Advisors Browser retains the following:

- Column selection, sorting and widths
- Row expansions in the `Hierarchy` view

- Location of the splitters
- Selected team bar
- Selected agent
- Last selected tab (module)

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 Sample Monitoring Hierarchy

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 11 on page 30).

Groupings

Figure 11 on page 30 shows a hierarchy of groupings.

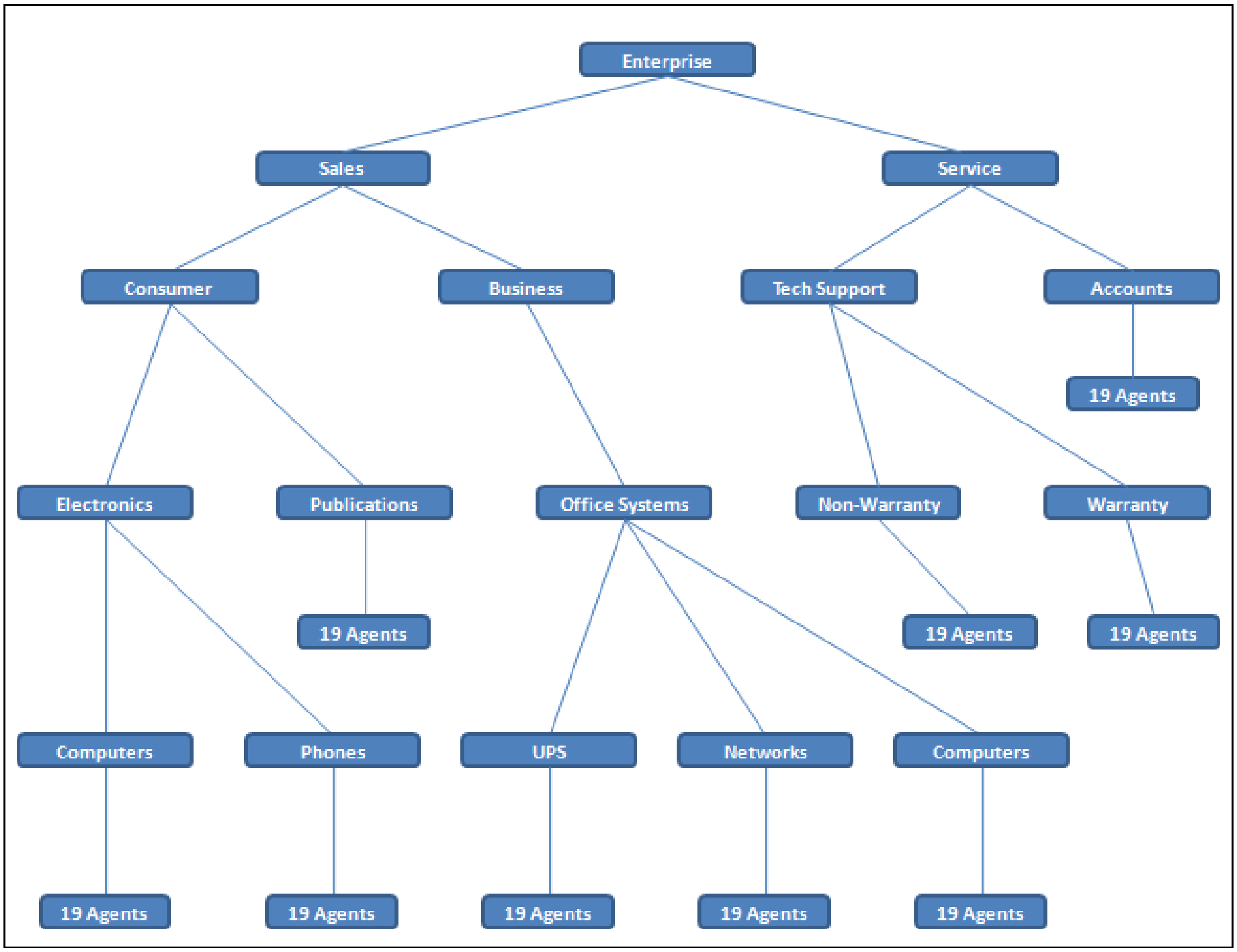

Figure 11: Sample Monitoring Hierarchy

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 12 on page 31 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.

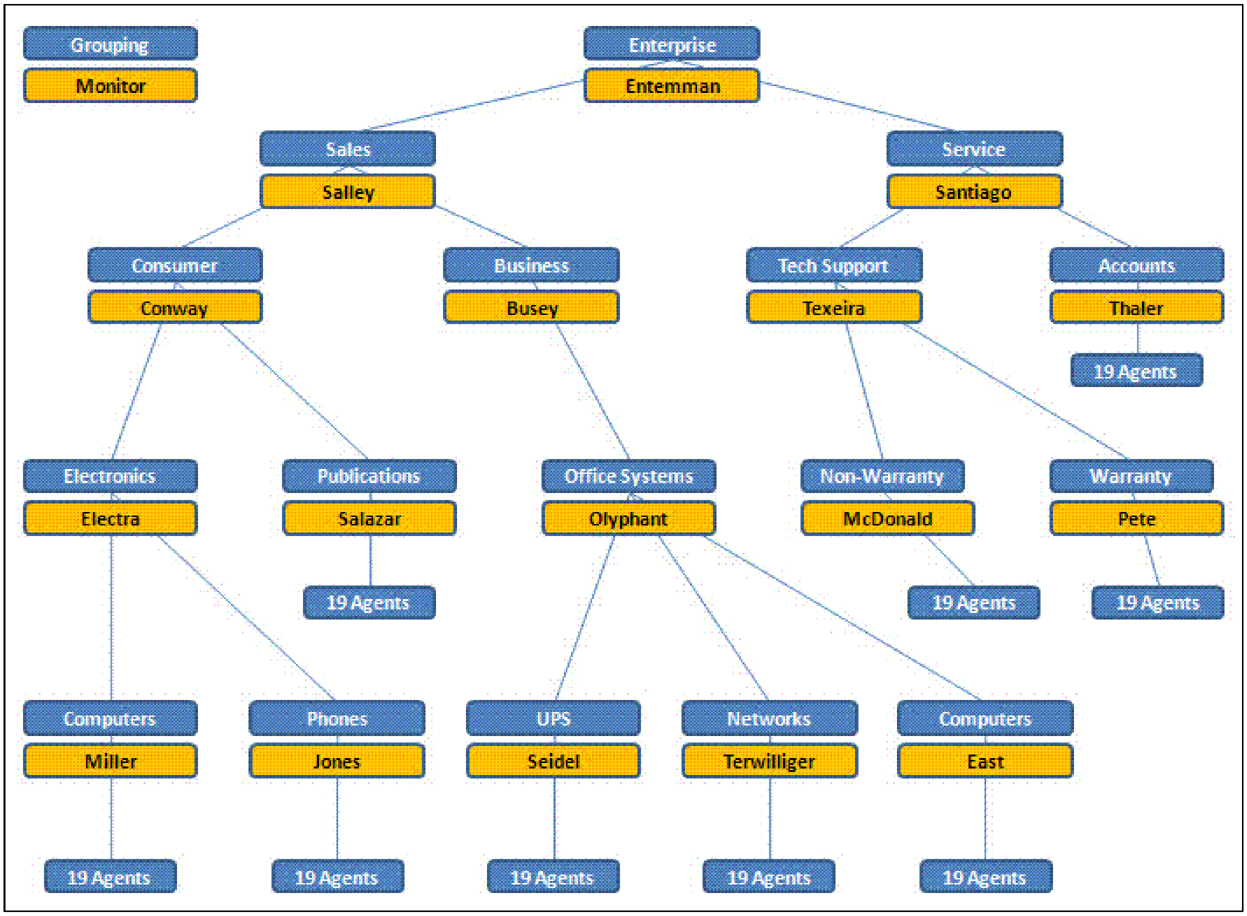

Figure 12: Monitoring Hierarchy

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

Table 3: Type Styles

Type Style	Used For	Examples
Italic	• Document titles • Emphasis • Definitions of (or first references to) unfamiliar terms • Mathematical variables Also used to indicate placeholder text within code samples or commands, in the special case where angle brackets are a required part of the syntax (see the note about angle brackets on page 37).	Please consult the *Genesys Migration Guide* for more information. Do *not* use this value for this option. A *customary and usual* practice is one that is widely accepted and used within a particular industry or profession. The formula, $x + 1 = 7$ where x stands for . . .

Table 3: Type Styles (Continued)

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

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