GENESYS
AN ALCATEL·LUCENT COMPANY

Performance Management Advisors 8.0

Workforce Advisor

User's Guide

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Preface

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

This document is valid only for 8.0.x releases 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 41.

About Workforce Advisor

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

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

Intended Audience

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

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

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Document History

New in Document Version 8.0.001.02

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

Chapter

1

Using Dashboard Contact Data

This chapter describes what you can see in the Dashboard contact data. It contains the following sections:

Viewing Contact Data

This section describes how to view contact data on the Dashboard.

Contact Centers Pane

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

- Selecting the organizational hierarchy (the *grouping* of information):
  - By reporting region then by contact center then by application group
  - By reporting region then by application group then by contact center
  - By geographic region then by contact center then by application group
  - By geographic region then by application group then by contact center
  - By operating unit then by contact center then by application group
  - By operating unit then by application group then by contact center
  - By reporting region then by network contact centers (CCs)
  - By geographic region then by network contact centers (CCs)
  - By operating unit then by network contact centers (CCs)
  - By application groups then by network contact centers (CCs)

- The values in the `Contact Centers` pane are calculated on the cumulative average or sum for the current interval since the most recent even half-hour interval (for example, 09:00, 15:30, 22:00). This interval is from 0 to 30 minutes long. Point-in-time metrics also display.

- If the rollups indicate that the contact groups should be included in the rollup, the metric values on each level are always calculated from the lower level values—contact groups or agent real-time data, and grouped by the elements related to the given rollup level. Some raw forecast values are already supplied as percentages or averages calculated for a 30-minute interval. Forecast values in rollups are then calculated as weighted values using another raw metric or its simple aggregation as a weight.

Summaries for metric values are either:

- Simple aggregations: `SUM, MAX, MIN, COUNT` of the lowest level raw values, grouped by the elements related to the rollup level. For example, the number of actual calls offered (`Act NCO`) on the Application Group level of the Geographic Region–Contact Center–Application Group view is the aggregation of calls handled (`CH= SUM(Calls Handled)`) taken from all applications associated to the contact groups that are included in the rollup, grouped by geographic region, contact center, and application group and belong to the given geographic region, contact center, and application group.

  The number of calls handled on the Enterprise level is calculated as `CH= SUM(Calls Handled)` taken from all contact groups included in rollup contact groups.

- Calculated values: values calculated using formulae based on simple aggregations of the values from elements with properties that match the given rollup level.

  For example, average handle time is the aggregation of handled time divided by the aggregation of calls handled. The average handle time (`AHT`) on the Application Group level of the Geographic Region–Contact Center–Application Group view is a Handle Time/Calls Handled taken from the set of applications associated to contact groups that are included in the rollup which belong to the given geographic region, contact center and application group.

- If a region or application group should be zero suppressed, it is hidden if forecast calls offered, calls offered and calls handled are zero.

- Expanding the regions in the `Contact Centers` pane: select the ▶ icon. The selected row remains highlighted until you select another row.

- Displaying the contact groups associated with a *contact center* in the `Contact Groups` pane: Select the information icon (ⓘ) beside a contact center (or click to select the whole line). If the contact center is at level three in a grouping, then the contact groups are filtered by the application

group at level two. Note that selecting a skill-group contact center displays the contact groups associated with the network contact center associated with the skill-group contact center.

- Displaying the contact groups associated with an *application group* in the `Contact Groups` pane: Select the information icon (●) beside an application group (or click to select the whole line).The contact groups are filtered by the contact center at level 2 in the grouping.

- Displaying the contact groups (grouped by *reporting regions*) associated with network contact centers only—select the `Reporting Regions – Network CCs` grouping and an information icon (●) beside a network contact center:
  - ◆ The contact groups functioning within a regional call-type site call centers and call-type network contact centers, and their associated skill-group contact centers display.

- Displaying the contact groups (grouped by *geographic regions)* for network contact centers only—select the `Geographic Regions—Network CCs` grouping and an information icon (●) beside a network contact center (or click to select the whole line).
  - ◆ The contact groups functioning within a regional call-type site contact centers and call-type network contact centers, and their associated skill-group contact centers display.

- Displaying the contact groups (grouped by *operating units)* for network contact centers only—select the `Operating Units—Network CCs` grouping and an information icon (●) beside a network contact center (or click to select the whole line).
  - ◆ The contact groups functioning within a regional call-type-site contact centers and call-type-network contact centers, and their associated skill-group contact centers display.

- Displaying the contact groups in *application groups for network contact centers only*: select the `Application Groups—Network CCs` grouping and an information icon (●) beside a network contact center (or click to select the whole line).
  - ◆ The contact groups functioning within a regional call-type-site contact centers and call-type-network contact centers, and their associated skill-group contact centers display.

- Displaying the skill groups in a *contact center* in the `Skill Groups` pane: Select the information icon (●) beside a contact center (or click to select the whole line). If the call center is at level three in a grouping, then the applications are filtered by the application group at level two.

- Widening and shortening a metric column: Right click on a vertical line between metrics and drag.

- Displaying a metric description in a ToolTip: Place the mouse pointer over a metric column header.

- Changing the size of the panes to focus on information in a particular pane (to the exclusion of other areas of the Dashboard): Drag the splitter (✛) located in the center of the four panes in any direction. The vertical splitter increases and decreases the size between the contact centers and `Contact Groups` panes on the left and the `Alert Map` and `Skill Groups` panes on the right. The horizontal splitter increases and decreases the size between the `Contact Centers` and `Alert Map` panes on the top and the `Contact Groups` and `Skill Groups` panes on the bottom. The relative sizes are saved when you log out and back in.

- The open and close times of contact centers represent the official time for active data analysis. During non-operational hours, summaries that draw data from the contact centers (such as regional summaries) are calculated without that information. During closed hours, the contact center is hidden. Once the alert expires, the contact center is also hidden; however, the expired alert continues to display in the `View Alerts` panel.

Contact Groups and Skill Groups Panes

- Highlighting the relationship between contact groups and skill groups.
    - In the lower-left pane, select a contact group.
    - In the lower-right pane, select a skill group.

- Displaying the technical name for a skill group: If provided, the descriptive name for the skill group displays in the pane.

- Displaying a metric description in a ToolTip: Place the mouse pointer above a metric column header.

- Sorting a column in ascending or descending order: Click on the header of the respective column. The table can be sorted only by a single column.

- If a skill group should be zero suppressed, it is hidden if an agent is not logged in to the skill group and calls handled are zero, and calls offered are zero. Depending on how your Workforce Advisor is configured, logged in could be excluded from this calculation.

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

Viewing Alerts

Alerts are viewed in the `Alerts` map.

Alerts Map

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

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

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

An inactive contact center is hidden from the map unless an active alert exists. Once the alert expires, the contact center is hidden.

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

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

The `Alerts` pane can display the following:

- `Business`
  A map showing active business alerts with the details in a carousel.

- `View Alerts`
  Active business alerts in a panel.

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

Note: WA does not monitor peripheral gateway or load-balance group availability.
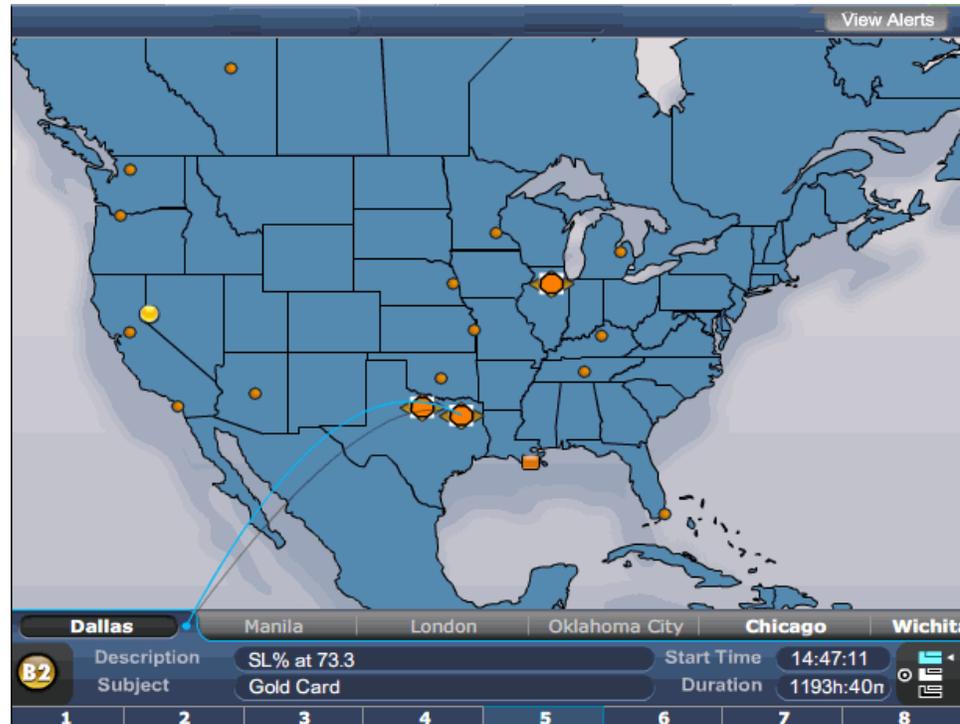
Figure 1: Alerts Map

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

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

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

Switch between the alert views (`Business`, and `View Alerts`) by selecting the corresponding button at the top of the `Alerts` pane.

Alerts Displayed in the Carousel

The names in white type have active alerts, the ones in gray do not. The tile of the alert currently in view is highlighted.

• Displaying the contact center name: Place your cursor over a contact center.

- Displaying alert details from the map for a contact center on the current day: Click the red or yellow dot representing the contact center. The carousel displays the violation description, subject, start time and duration of the alert.

- Automatically cycling through each alert of all contact centers: Click the Auto button   . The default setting is to scroll automatically.

- Automatically cycling through each alert of a single contact center, click the second button

- Manually displaying each contact center with alerts: Click the Manual button and click a contact center in white text.

- Displaying another alert in the same contact center: Click an alert tile.

Alert Types   The Business view displays two types of alerts:

- Contact group metric threshold violation alerts
- Manual alerts

Alert Details   A carousel displays the alert details for individual contact centers. The contact center names display across the top of the carousel. In automatic mode, the carousel scrolls past contact centers without alerts and moves to the next contact center with alerts. The carousel slows to allow you to read the alert description. Clicking a Details link in the Description field opens a Web page with more details. A line is drawn connecting the active contact center tab to the contact center. Each alert for the contact center is numbered in a tile at the bottom of the carousel. The number of the alert currently in view is highlighted. When you select an alert tile, the mode switches to manual. Display other alert types by selecting another alert type button. In semi-automatic mode, the alerts cycle for the selected contact center.

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

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

- If both a skill-group contact center and a call-type contact center are selected for the manual alert, the call-type contact center alert and the skill-group contact center alert display in the Alerts panel.

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

The Alerts Panel

The Alerts panel (Figure 2 on page 18), which is available from the Business view lists all active alerts (Business and Manual) within the enterprise hierarchy. This panel presents alerts that have Critical and Warning severity levels.
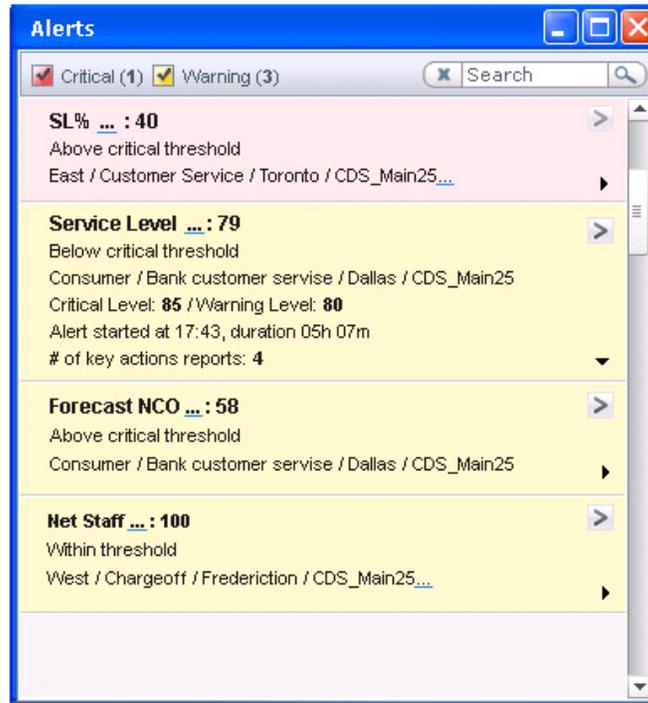
Figure 2: Alerts Panel

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

Alert Contents

Each alert displays the information described in Table 1.

Table 1: Alerts Panel Parameters

	Business Alert	**Technical Alert**	**Manual Alert**
Name	The metric display name and its current value. On mouseover a brief description of the metric is displayed (this is the description configured in the `Metrics` page of the Administration module).	Displays `Peripheral Gateway Offline.`	The message configured for the alert. The message is configured in the `Alerts` page in the Administration module.

Table 1: Alerts Panel Parameters (Continued)

	Business Alert	**Technical Alert**	**Manual Alert**
Status	The status relative to threshold, from the following list of values: • `Below critical threshold` • `Above critical threshold` • `Below warning threshold` • `Above warning threshold`	Displays `Critical`.	Displays `Critical` if the level of the alert (as configured in the Administration module) is 1. If the level is 2, the second line displays `Warning`.
Context	The scope of the metric including items such as business line, application type, and location (that is, region, application group, call center). The display format is: `Regions/Application Groups/ Contact Centers/Application` On mouseover, the full scope name is shown in a ToolTip.	Displays the name of the contact center.	Displays the name of the contact centers associated with the alert. Because a manual alert can be associated with multiple contact centers, there are multiple entries in the `Alerts` panel for a given manual alert, with one entry for each contact center.

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

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

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

  The time of the alert is displated in a 24 hour format, and *yy* and *zz* represent the number of hours and minutes respectively the alert has been active.

- The key action report name and responsible assignee's last name and first name (if only one key action report exists) or the number of key action reports (if multiple key action reports exist).

Display Modes

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

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

Launching Action Management Report

The Action Management Report (AMR) page can be launched from any of the alerts in the panel by clicking on the arrow icon in the upper right of the alert box; the alerts table on the AMR page is populated with the information from the alert where the AMR is launched from.

Filtering by Text

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

Filtering by Severity

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

Resizing

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

The Column Chooser Page

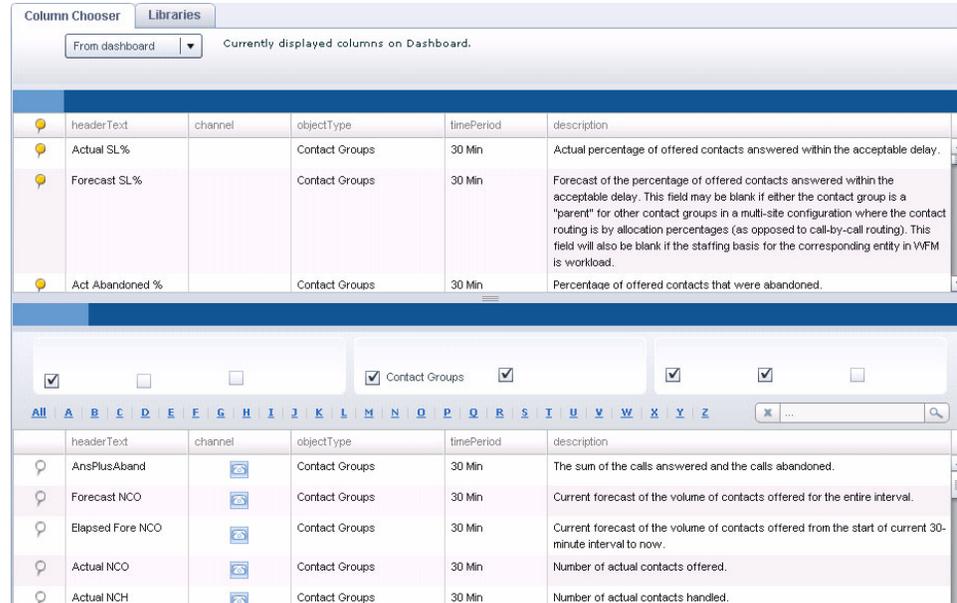The `Column Chooser` page is used to select which columns should be shown on the Dashboard. See Figure 3.

Figure 3: Column Chooser

Selecting Time Periods

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

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

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

Default Metrics Sort Order

The default sort order of metrics is as follows:

* Primary sorting—Metrics are ordered by object type.

* Secondary sorting—Metrics are ordered alphabetically by name.

* Tertiary sorting—Metrics are ordered by time period (`Now` followed by `30 Mins` followed by `Today`).

Moving Metrics by Pinning/Unpinning

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

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

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

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

Metrics Library

The Metrics Library allows you to:

• Create reusable sets of metrics to display on the Dashboard.

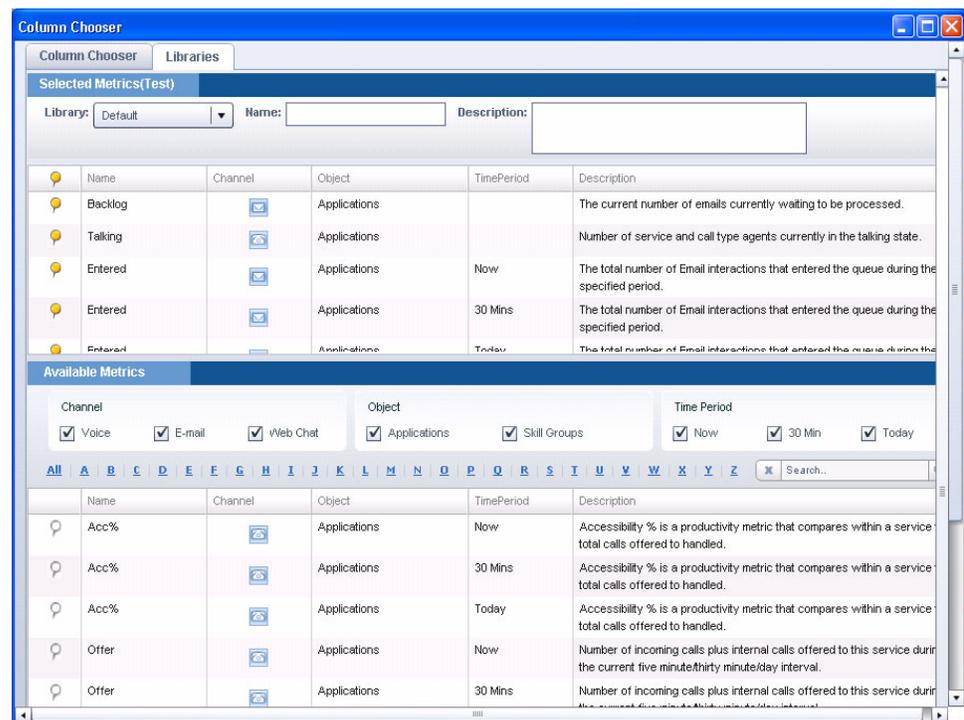• Maintain those sets.

Figure 4 shows the `Metric Library`.

Figure 4: Metric Library

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

• `From Dashboard`

• `Default`

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

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

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

General Usage Guidelines

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

*   Logging in and out retains the time interval, metric sequence, column sorting, column widths, row expansions, the location of the splitter, the grouping, and the last-selected module tab.

*   When all or part of the data required for the metric value calculation is not available or the raw values make the resulting metric not applicable, the dashboard displays `N/A`.

    For example, `AHT` will show `N/A` if there were no handled calls.

*   When related raw values are not produced at the source, the Dashboard will display "-". For example, the `LongQueue` skill group metric contains values from all Cisco skill groups, but for all Genesys agent groups the values are replaced with dashes.

*   If a metric's value cannot ever be supplied by the data source, a dash (-) displays in its place.

*   When a contact center is closed or the values for a region or application group are all zeros, the row is dimmed. The ability to expand (▶) is disabled. Any item that is expanded and then turns suppressed is contracted. If an information icon (ⓘ) had been selected and the bottom two grids populated, when the same item becomes suppressed the information in the bottom two grids remains as is until you select an unsuppressed row.

*   The last update time indicates the time of the last data refresh.

- Stop the data from updating: Click the `Pause` button (▮▮). The button changes to ▶ and the update status indicator change to yellow. The data resumes updating if you select a new hierarchy grouping.

- Resume updating the data: Click the `Play` button (▶). The button changes to ▮▮, the update status indicator changes to green, and the real-time updates resume.

- The update status indicator in the top-left corner changes to red (▬▬▬) when the Dashboard cannot detect any data to display.

- Your administrator might have set up an Advisor tab with an external Website. You need permission to use it. Depending on the website, when you switch to another Advisor tab and then return to the external website, you may have to log in to its home page again.

2 Using Resource Management

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

For full information on how to use the Resource Management module, please see the *Performance Management Advisors 8.0 Resource Management User's Guide.*

Overview

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

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

Selecting the Agents to Manage

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

- One agent/row from the `Contact Centers` pane

- One or more agents/rows from the `Applications` pane or `Contact Groups` pane

- One or more agents/rows from the `Skill Groups` pane

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

Selecting a Single Agent from the Contact Centers Pane

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

For example, in Figure 5 on if you select the Boston call center from the `Call Centers` pane, RM will display the agents that belong to following the skill groups that belong to the applications, Credit Cards and Banking and the Consumer application group:

- `New_CC_Accts`

- `Close_CC_Accts`

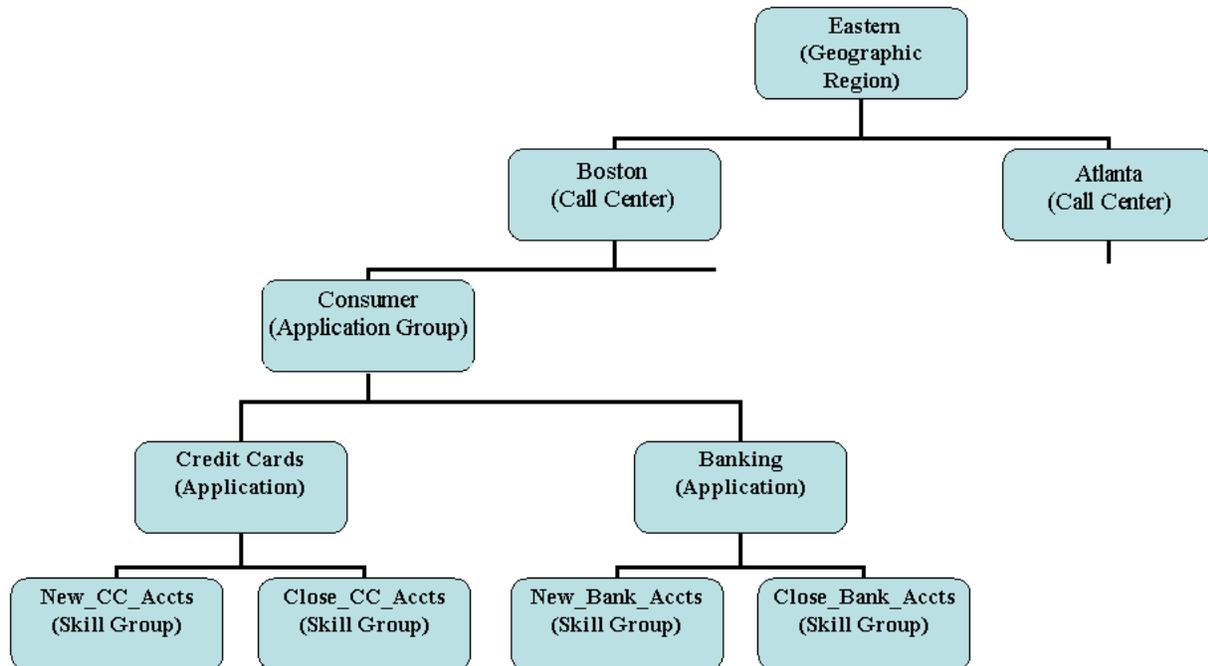- `New_Bank_Accts`

- `Close_Bank_Accts`

Figure 5: Enterprise Relationships

Selecting One or More Agents from the Applications or Contact Groups Pane

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

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

For example, in Figure 5, if you select Credit Cards from the `Applications` pane, RM displays the agents that are associated with the skill groups associated with:

- `New_CC_Accts`
- `Close_CC_Accts`

Selecting One or More Agents from the Skill Groups Pane

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

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

For example, in Figure 5 on , if you select the `New_CC_Accts` skill group,
RM displays the agents that belong to that skill group.

Chapter

3

Action Management Reports

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

Action Management Report

The `Action Management` report is shown in Figure 6 on page 30.

Only one `Action Management` report can be opened at a time. From the `Action Management` report, you can:

- Enter the details of the key action taken to resolve a rule violation. See "Adding a Key Action Report from the Map" on page 32.

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

- `Alerts`—The current values of the alert selected on the Map or the `Alert Management` tab.

- `Key Action Reports`—A table of the existing key action reports.

- `Key Action Report Details`—The details of the key action report.

- `Follow Up`—The results of the action taken and the lessons learned.

Figure 6: Action Management Report

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

Table 2: Key Action Report—Field Descriptions

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

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

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

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

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

Adding a Key Action Report from the Map

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

Procedure:
Adding a key action report from the map

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

Start of procedure

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

    The `Action Management` page is displayed with default values where configured (See the *Performance Management Advisors 8.0 Alert*

Management User's Guide for further details). The alert is automatically set as the primary alert.

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

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2. Enter the first few letters of the responsible assignee's last name and select a name. The last name, first name and e-mail address are displayed.

3. Specify when the key action was performed in the `Key Action Time, Date,` and `Time Zone` fields.

   The time format is `hh:mm` using the 24-hour clock. The date format is `MM/DD/YYYY` or you can select a date by using from the calendar icon. The default is the current system time, date and time zone of your server.

4. Either select a cause from the `Cause` drop-down list or type one in the `Cause` field. The cause name must be unique and is not case-sensitive.

5. To suggest that the cause you typed in the `Cause` field should be available for future selection from the `Cause` drop-down list, select the `Add to List?` check box.

   The cause will display in the `Causes` table on the `Administration Alert Causes` page for an administrator to approve.

6. Optionally, provide more details for the cause in the `Alert Cause Description` text box.

   An alert cause must be specified in order to enter a description. The text-box limit is 256 characters.

7. Either select a key action from the `Key Action Taken` drop-down list or type one in the `Key Action` field. The key action name must be unique and is not case-sensitive.

8. To suggest that the key action you typed in the `Key Action Taken` field should be available for selection in the future from the `Key Action Taken` drop-down list, select the `Add to List?` check box.

   The key action taken displays in the `Key Actions Taken` table on the `Administration Key Actions` page for an administrator to approve.

9. Optionally, provide more details for the key action in the `Key Action Taken Description` text box.

   A key action must be specified in order to enter a description. The text-box limit is 256 characters.

10. Enter a description of the results of the action taken in the `Results of Action Taken` text box.

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

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

   The text box limit is 256 characters.

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

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

End of procedure

4 Genesys Advisors Browser

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

Installing/Uninstalling the Genesys Advisors Browser

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

Installing the Genesys Advisors Browser

Procedure:
Installing the Genesys Advisors Browser

Start of procedure

1. With Microsoft Internet Explorer, open
   `http://home.genesysadvisors.local`.
   The installation automatically begins.

2. If prompted, accept the installation of the ActiveX Control.

3. When prompted, click `Install`. The `Login` page is displayed.

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

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

---

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

End of procedure

Uninstalling the Genesys Advisors Browser

Procedure:
Uninstalling the Genesys Advisors Browser

Start of procedure

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

End of procedure

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

Using the Genesys Advisors Browser

The Genesys Advisors Browser is installed in your `Start` folder or on your desktop, so when you log in to your computer you should see a prompt to log in. Only users with the `admin` role can access the Administration Console.

Procedure:
Logging in to the Genesys Advisors browser

Start of procedure

1. Double click on the Genesys Advisors browser icon. The `Login` page is displayed (Figure 7).

2. Type a user name and password.

3. The host name is `http://home.genesysadvisors.local` by default. However, if the `home.genesysadvisors.local`server is not found while the `Login` page loads, you must type your server name in the `Host Name` field. The host name is configured by the installer. If it is incorrect, see your system administrator. The new host name will become the default server for subsequent logins.

4. To save the user name and password on your local machine, check the `Remember Me on this Computer` check box. If selected, the user name and password will pre-populate when you start the Genesys Advisors browser.

5. Click the `Log In` button. The Genesys Advisors browser displays with the module tabs to which you have access. Once logged in, you can display other modules to which you have access in other windows by clicking the button.

End of procedure

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

Figure 7: Genesys Advisors Browser Login Page

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

Navigation

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

Figure 8: Advisors Browser Tabs

Requesting a New Password

Procedure:
Requesting a new password

Start of procedure

1. On the `Login` page, click `Forgot Your Password?`
A `Forgot Password?` page is displayed (Figure 9).

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

2. Enter your user name and e-mail address.

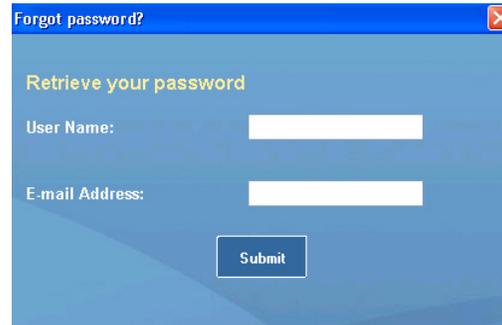3. Click `Submit`. A new password is sent to your e-mail address.

Figure 9: New Password Page

End of procedure

Changing a Password

Procedure:
Changing a password

Prerequisites

You must be logged in to change your password.

Start of procedure

1. Click the Change Password button. A Change Password page displays
    (Figure 10).

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

2. Enter your old password, then your new password.

3. To confirm, re-enter your new password.

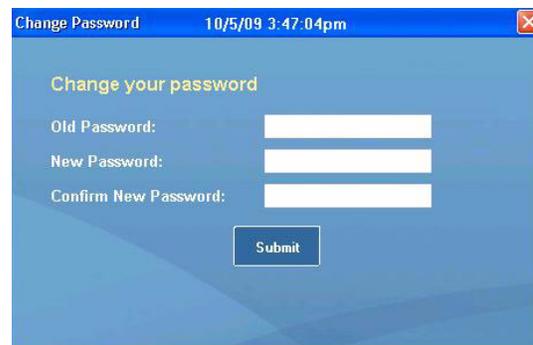4. To save, click Submit.

End of procedure

Figure 10: Change Password Page

Accessing Help

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

Logging Out

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

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

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 45).	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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