Performance Management Advisors 8.1.1

Frontline Advisor

Administration User's Guide

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Preface

Welcome to the Genesys *Performance Management Advisors 8.1 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 8.1.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 47.

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 Frontline Advisor makes agent activity trends more obvious.

Frontline Advisor 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

This section describes information that has been added or substantially changed since the first release of this document.

Release 8.1.101.00

- Administration of new time profiles
- Changes to monitoring hierarchy information

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.

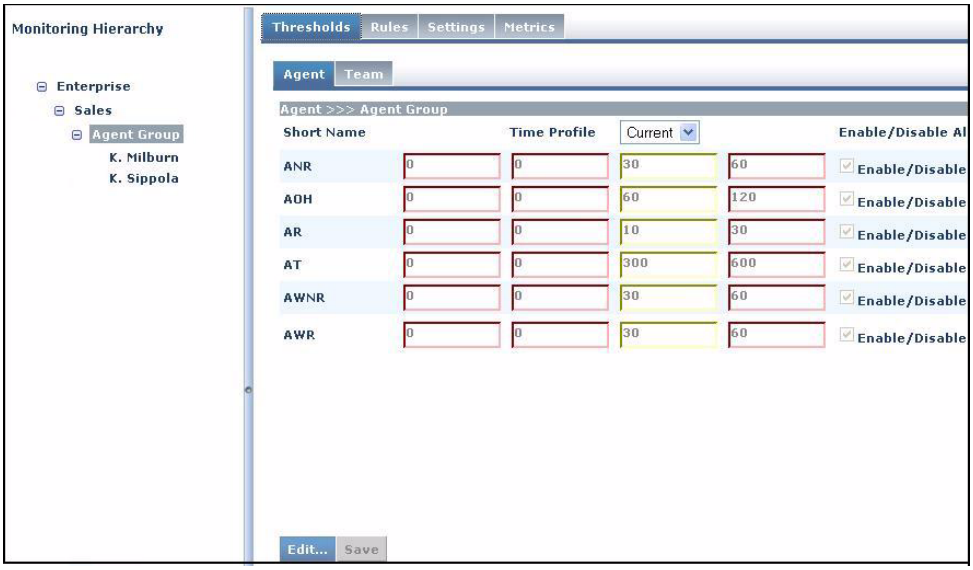

Figure 1: Administration Console

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 group 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 active alerts.

Active alerts are those alerts for which the agent is still in violation of the rule. Inactive alerts are those alerts for which the agent has corrected his/her behavior and is not in violation of the rule any more. Inactive alerts get cleared when the agent keeps his behavior corrected and doesn’t violate the rule for a time governed by the rule's time period.

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 Hierarchy Overview

Introduction

In release 8.1.1, the Frontline Advisor hierarchy is derived from the hierarchy defined in the Genesys Configuration Server. Users now have the option of configuring which location/folder in the Configuration Server houses the hierarchy; multiple folders can be chosen if the hierarchy is spread over many different folders or tenants.

If multiple folders are specified, FA creates a consolidated view of the hierarchy. The hierarchy in the Configuration Server consists of a tree of folders with the terminating nodes being agent groups, which in turn have agents as members.

Terminology

The FA hierarchy consists of *groups* and *agents* instead of supervisors, groups and agents as in previous versions. Folders and agent groups in the Genesys Configuration Server translate to *groups* in the FA hierarchy. Folders and agent groups created in the Configuration Server have a tree structure in which a folder can have multiple sub-folders or agent groups. The agent groups contain agents. The agents present in agent groups in Configuration Server represent *agents* in the FA hierarchy. An agent can be a member of multiple agent groups and so can have multiple parents.

Access Permissions

Access permissions are configured at each level of the hierarchy to determine which levels of the hierarchy each user has access to. When an administrator logs in, a customized view of the hierarchy is created for them. In general, where a user has permission for a specific level, he/she will also have permissions to levels directly below.

These permissions are configured at the object level in the Genesys Configuration Server.

Note: For Cisco environments, the Cisco Adapter requires the agent skill ID of the agent for registering and issuing statistics. This is configured for the agent as the `ExternalID` property on the `Annex` tab in the `Frontline Advisor` section of the `Agent` object.

Sample Hierarchy

A sample monitoring hierarchy has nine groups 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 Hierarchy,” on page 43 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 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.

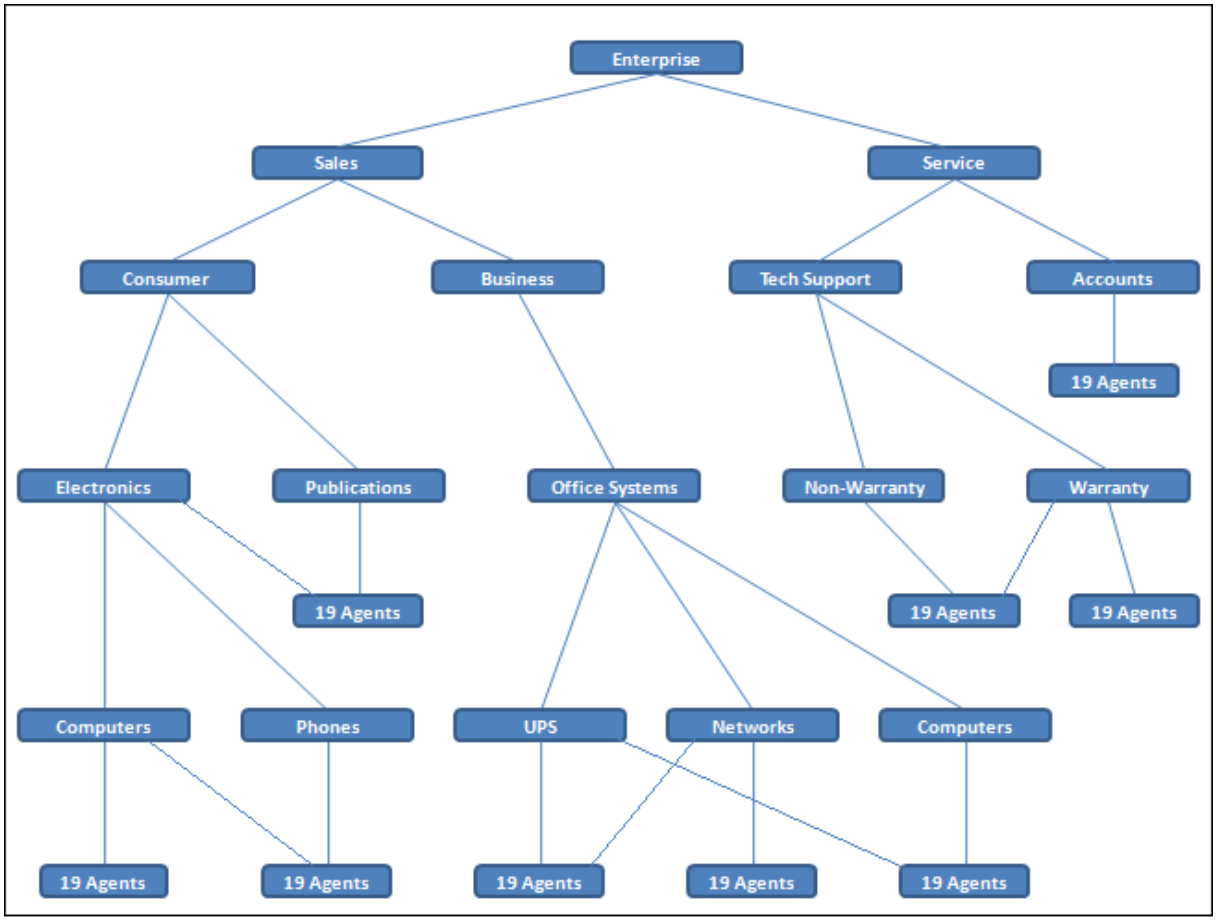

Figure 2: Sample Monitoring Hierarchy

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 top-level ancestor node(s). 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 group'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: Disabling a threshold or rule causes it to be disabled at all inheriting nodes (unless re-enabled at some lower-level node).

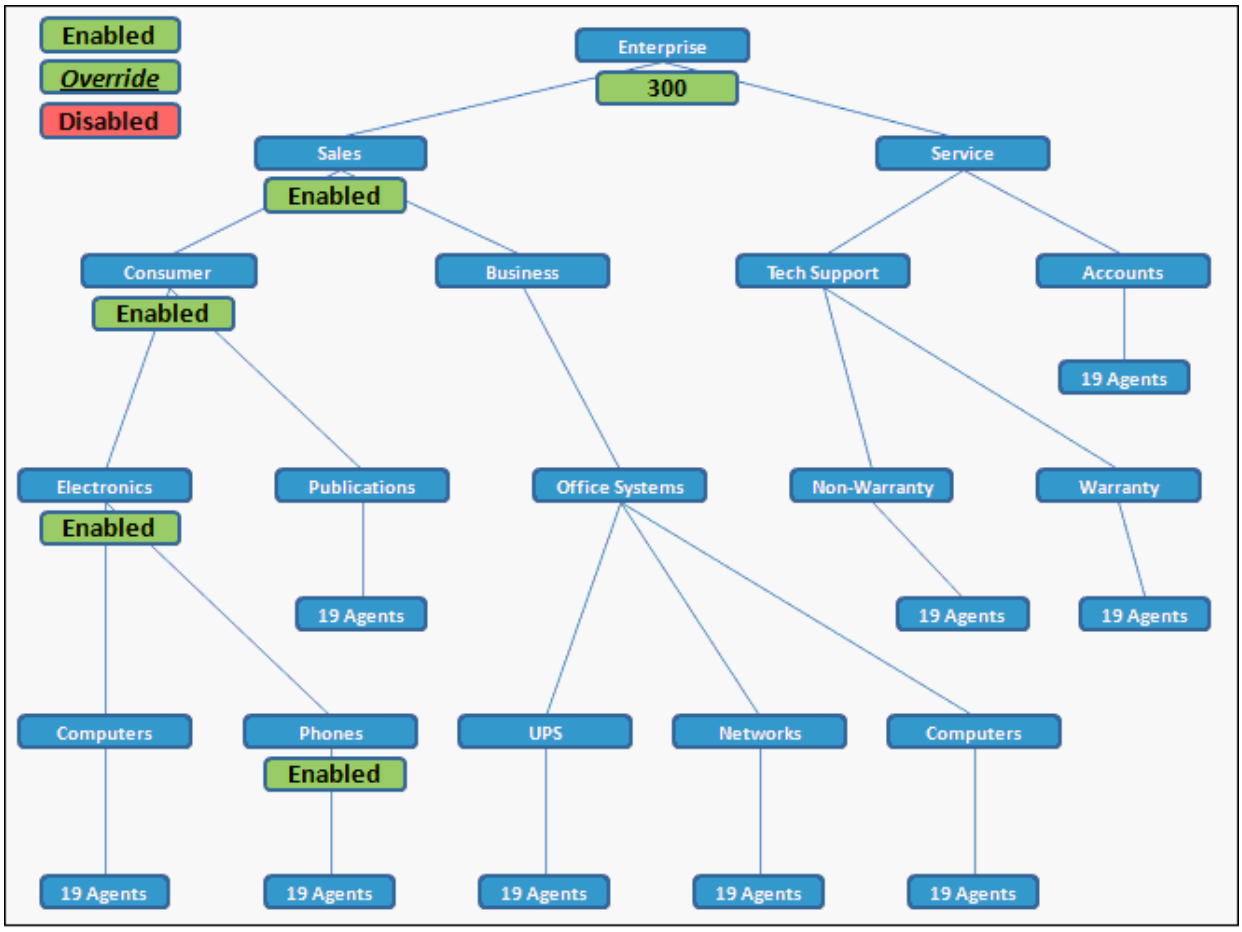

Figure 3: Phones Node

Monitors

The monitoring information defines which people can monitor which groups in Frontline Advisor. Figure 4 displays both the monitoring information and the grouping information. For a detailed example, see "Sample Monitoring Hierarchy" on page 43.

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 supervisor has monitoring access to all groups for which they have "Read" access, as defined in the `Permissions` tab for that group in the Configuration Manager.

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.

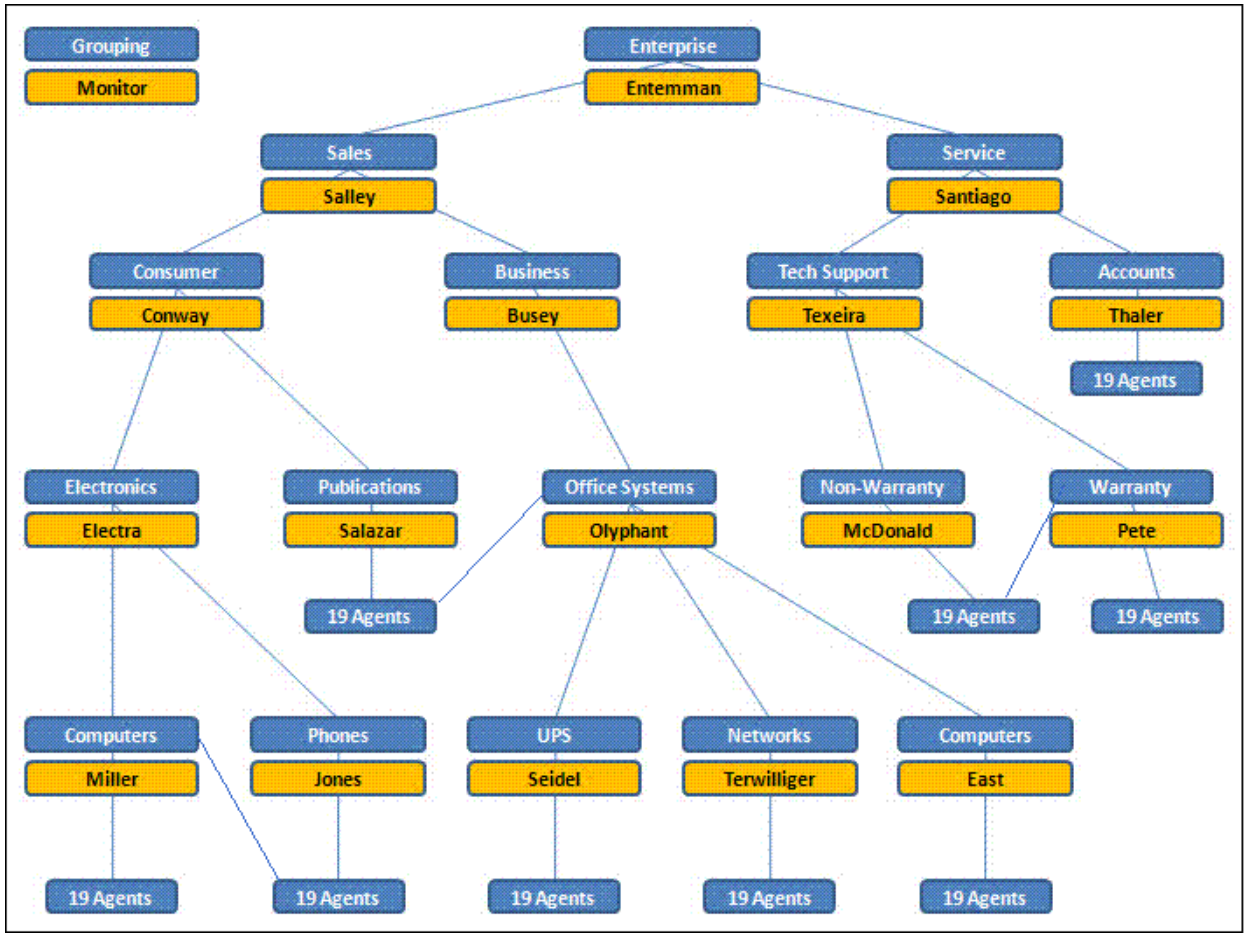

Figure 4: One Monitor per Group in the Monitoring Hierarchy

Enabling, Disabling, and Overriding Thresholds and Rules

At the top-level nodes of the hierarchy, the threshold or rule can be enabled or disabled. By default the top-level thresholds and rules are disabled.

If a threshold or rule is disabled at a group level, then it is disabled for all agents on that group. 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 agent group level, then all agents in that group 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 agent and agent groups imported from the Genesys Configuration Server. Frontline Advisor imports data from the Genesys Configuration Server at startup and once every day.

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 Genesys Configuration Server. You can expand the hierarchy from groups down to agents; see "Expanding and Collapsing Hierarchies" on page 36.

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 group thresholds; however, you should review and change the values accordingly. An agent threshold takes precedence over the group threshold. A group threshold takes precedence over a top-level threshold. Each section lists the display name and the description of the metrics.

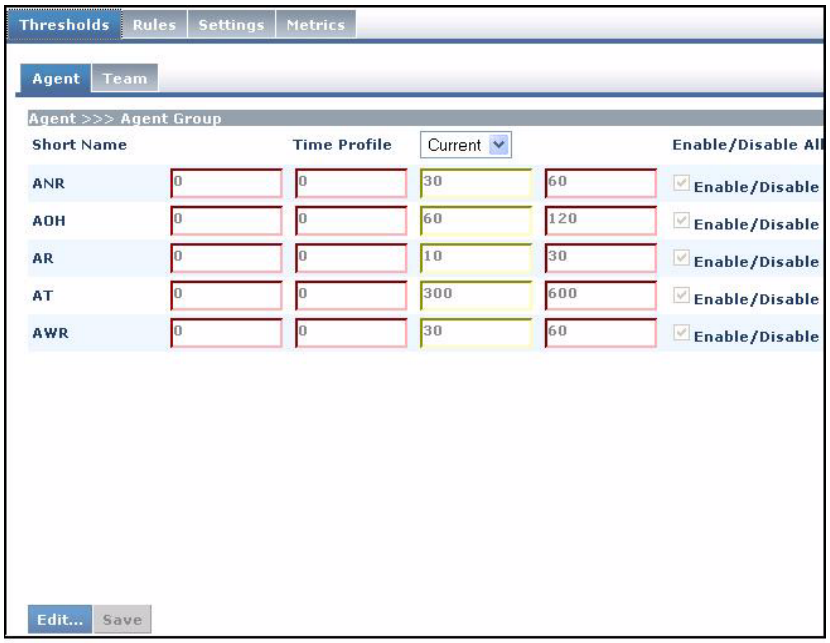

Figure 6: Thresholds Tab

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
AWR	Agent Work Ready

Table 1: Agent Threshold Metrics (Continued)

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

The time profile of the metric also displays and can be changed by selecting from the drop-down list.

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
TEACPT	Team Number of Email Interactions Accepted
TERJCT	Team Number of Email Interactions Rejected
TETC	Team Number of Email Interactions Accepted/Pulled/Created & subsequently revoked
TETXFRS	Team Number of Email Transfers
TEH	Team Number of Emails Handle
TEOFFERED	Team Number of Emails Received
TEINPROC	Team Number of Emails Currently being Processed
TEHT	Team Total Handle Time for Emails
TERJCTPCT	Team Percentage of Emails Rejected (eRjct*100/eOffered)
TETOPCT	Team Percentage of Emails Timed Out (eTO*100/eOffered)
TEAHT	Team Average Handle Time for Emails in secs (eHT/eH)
TWACPT	Team Number of Chat Interactions Accepted
TWRJCT	Team Number of Chat Interactions Rejected
TWTO	Team Number of Chat Interactions Accepted/Pulled/Created & subsequently revoked

Table 2: Team Threshold Metrics (Continued)

Acronym	Description
TWTXFRS	Team Number of Chat Interactions Transferred
TWH	Team Number of Chat Interactions Handled
TWOFFERED	Team Number of Chat Interactions Received
TWINPROC	Team Number of Chat Interactions currently being Processed
TWHT	Team Total Handle Time for Chat Interactions
TWRJCTPCT	Team Percentage of Chat Interactions Rejected (wRjct*100/wOffered)
TWTOPCT	Team Percentage of Chat Interactions Timed Out. (wTO*100/wOffered)
TWAHT	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)

Table 3: Alert Thresholds

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)

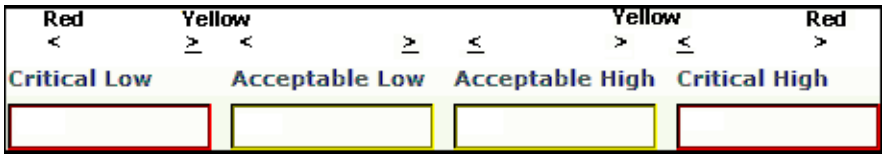

Figure 7: Threshold Bar

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

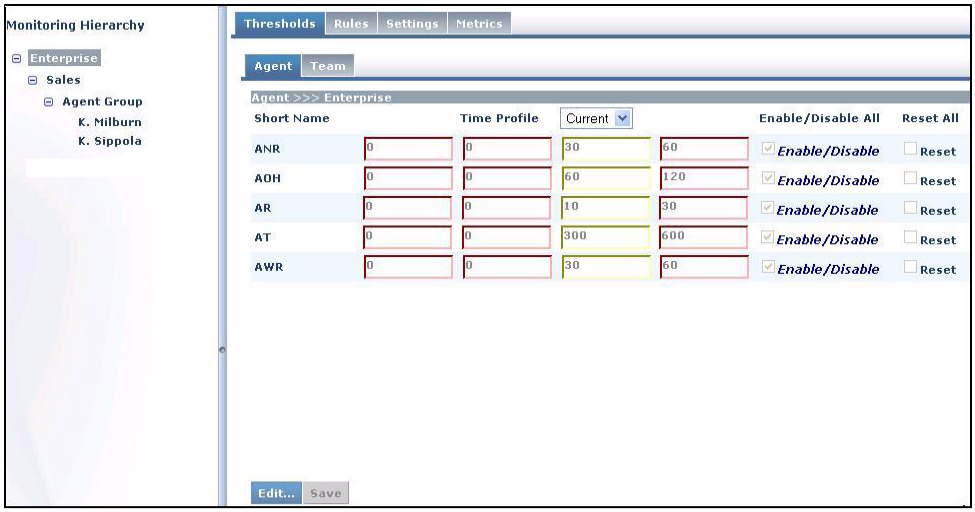

Figure 11: Top Level of the Thresholds Tab

Disable/Override All Thresholds

To disable or override all thresholds at the selected node at once, click the `Edit` button at the bottom of the pane, then select the `Enable/Disable All` check box.

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 34.

For a group 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 deactivate 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, in Figure 12, that you want to store an override value of `600` at the node that `Conway` monitors, that is, the `Computers` node. To enter an override value, click the `Edit` button to enter the edit mode (Figure 11). Type a value of `600` for Critical High AHT (Figure 12). Then click the `Save` button. The override value of `600` now displays at the `Conway` (`Computers`) node in italic font, and a slightly larger font than the other (inherited) values (Figure 12). Note that the node has been set to enable.

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

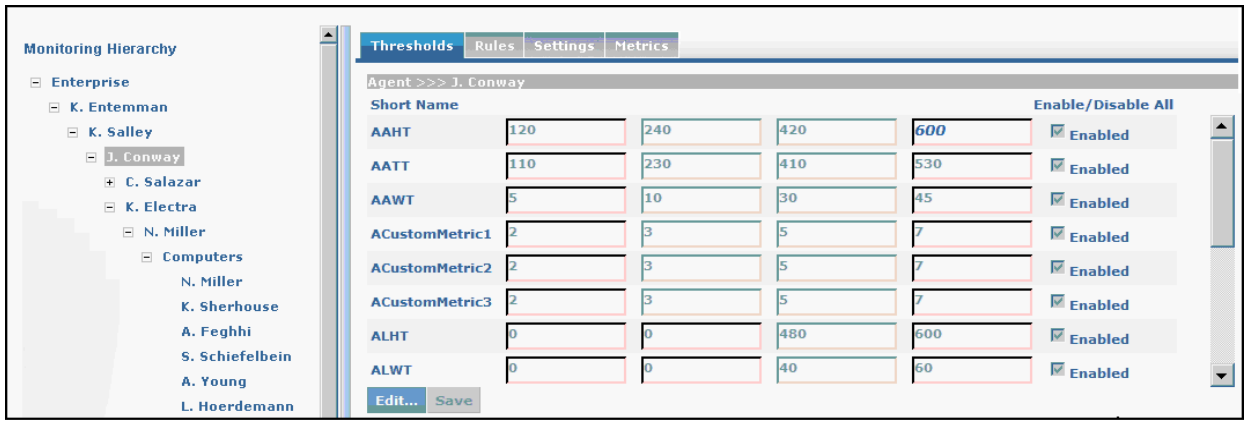

Figure 12: Override Critical High AHT, 600

Note: Because an agent can now belong to multiple agent groups, it is possible for a threshold to be defined in different ways according to different overrides at groups of which the agent is a member. In this case, the threshold violation level can be displayed differently, depending on which path the agent is navigated to in the Supervisor Console.

For example, the AHT metric may have a red alert when the agent is viewed as a member of the Sales group, but only yellow when the agent is viewed as a member of the Services group.

Rules can also have different definitions for the same agent based on the path chosen through the hierarchy to reach that agent. Only rule violations for the selected path are shown.

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 13) 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 group level, agent level, or for a higher level this should be selected in the hierarchy tree. An agent rule takes precedence over the group rule. A group rule takes precedence over the top-level rule. Rules evaluate and trigger on agent metrics, but not for group metrics.

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

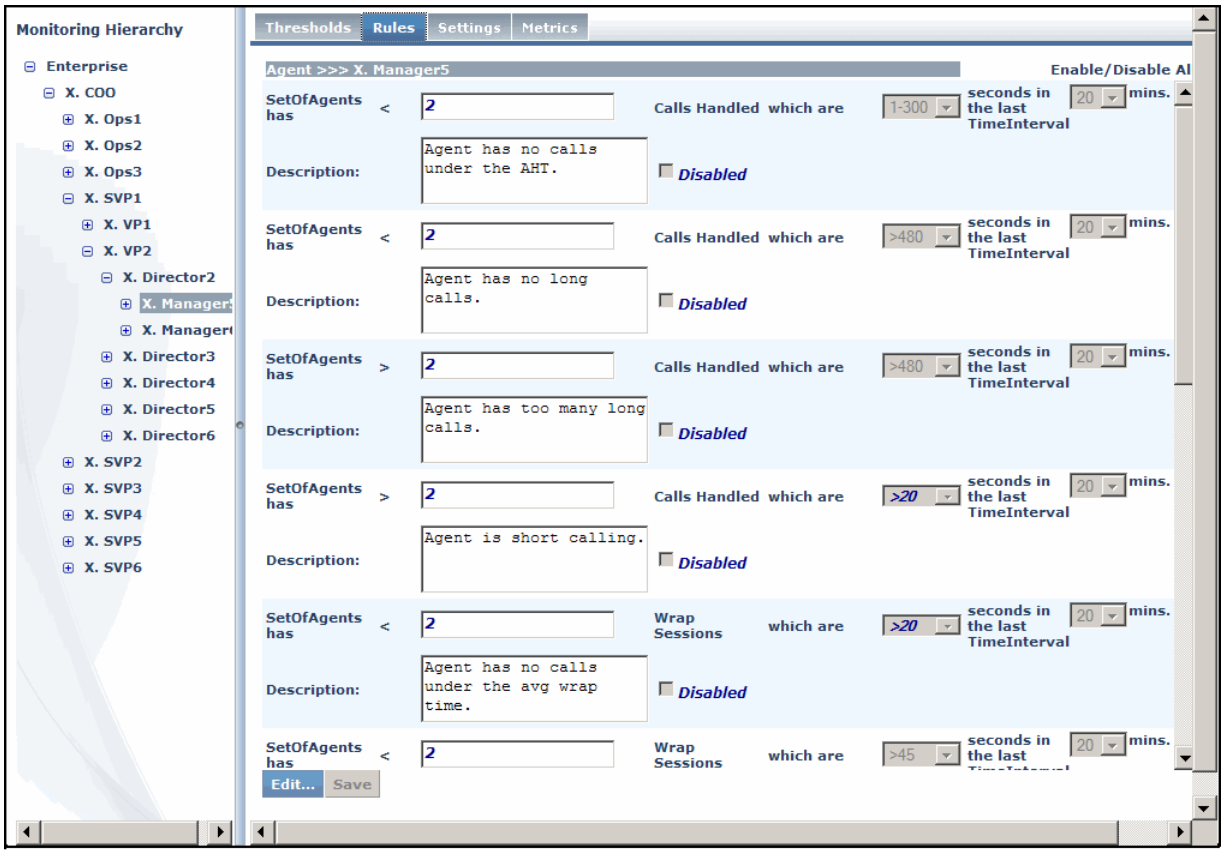

Figure 13: Rules Tab

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—only positive integers 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 default value is `20`.
- 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.

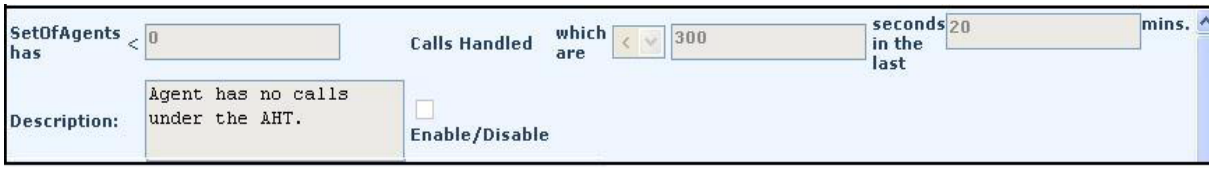

Figure 14: Rule Example

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 15).

Figure 15: 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 15).

Enable/Disable All Rules

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

Defining Rules

Procedure: Defining a rule

Start of procedure

1. Select the `Rules` tab (Figure 13).
   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. Enter a time interval in the text box.
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 16 because it is scrolled out of view).

Then enter the override value and click the `Save` button. Figure 16 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.

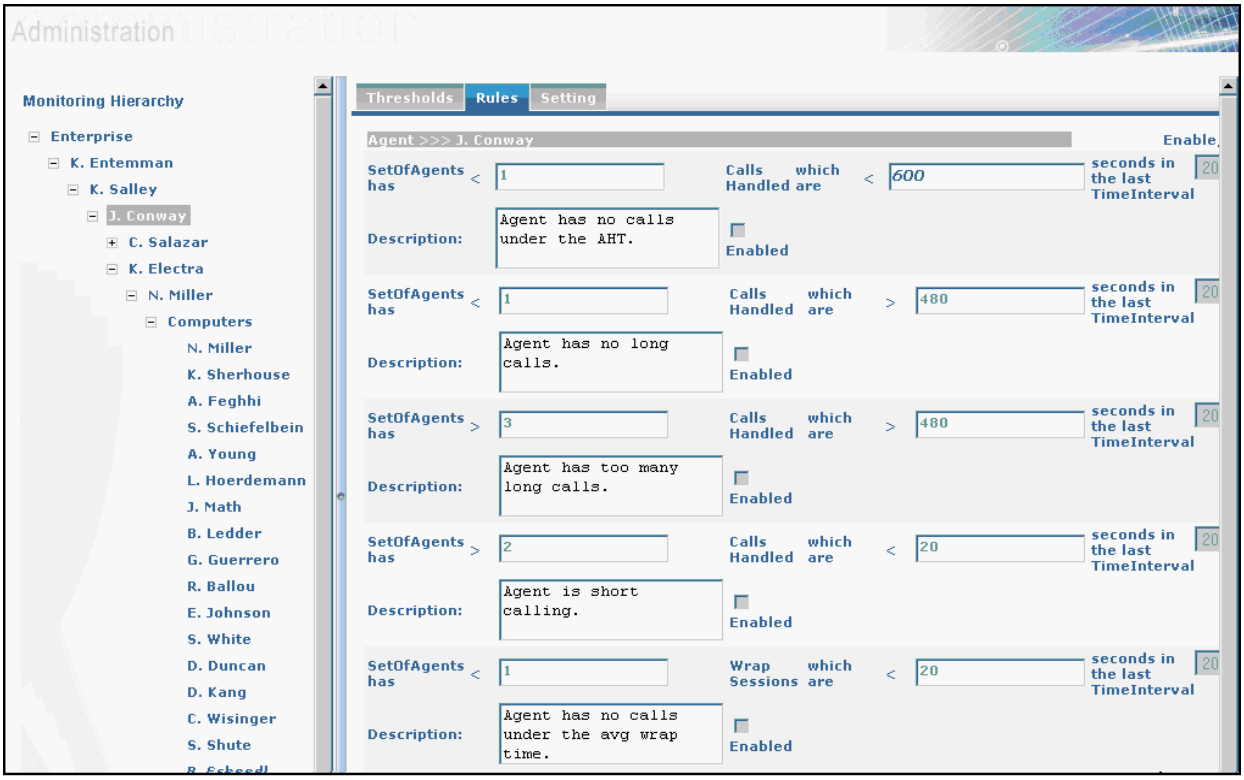

Figure 16: Override Calls Handled, 600

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 node), a `Reset` option will be available for all constraints that are overridden at that node.

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 top-level node if there are no overrides higher up in the hierarchy. For example, take the following hierarchy again and the AHT metric:

Figure 17: 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.

Settings

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

- `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.
- `Agent Performance Interval` (seconds)—The agent performance interval is the frequency of updating the group's and agent's performance data and refreshing the cache data. Typically, it is configured to 10 minutes.
- `Time profiles`—Up to three system-wide time profiles for performance metrics, each with its own definable name, interval (minutes), and type (either `Sliding` or `Growing`).

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`.

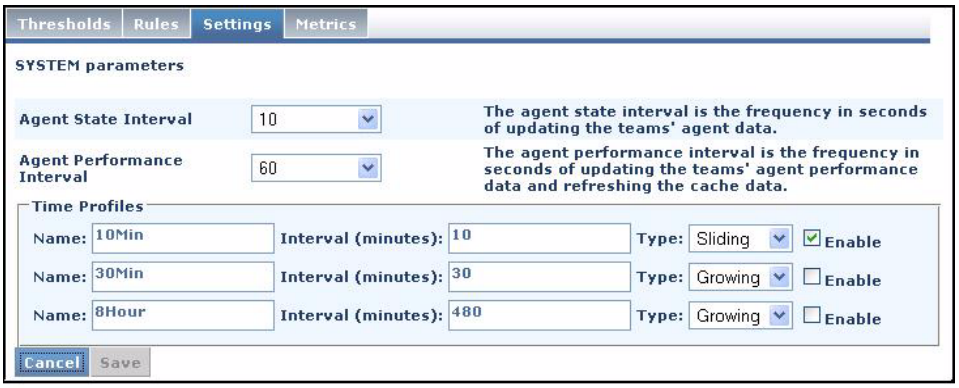

Figure 18: Settings Page

Displaying Metrics in the Column Chooser

You use the `Metrics` tab to define whether or not a metric will be selectable in the column chooser.

Figure 19: Metrics Tab

You can filter the display by time profile and by channel.

Click `Edit` to activate the check boxes in the `Display In Column Chooser?` column.

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

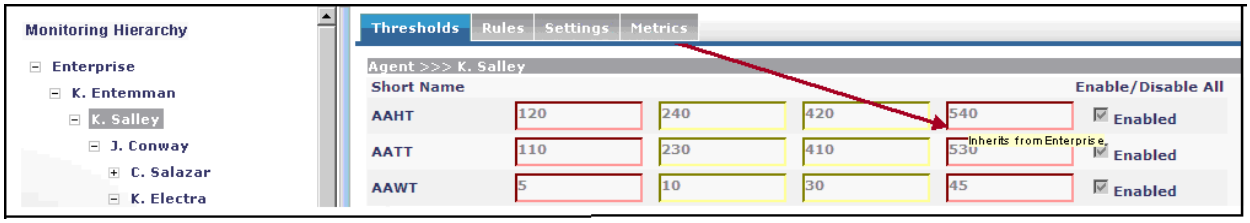

Figure 20: Type 1

This ToolTip (Figure 20) displays if you mouse over the inherited threshold value of 540 from the root node.

Type 2

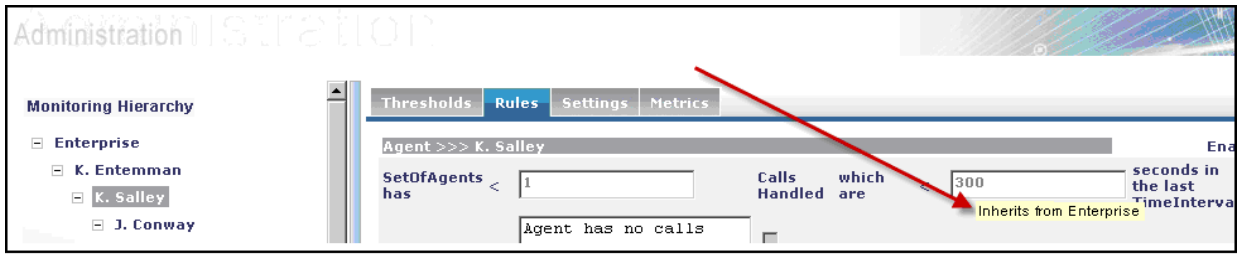

Figure 21: Type 2

This ToolTip (Figure 21) displays if you mouse over the inherited rule value of 300 from the root node.

Type 3

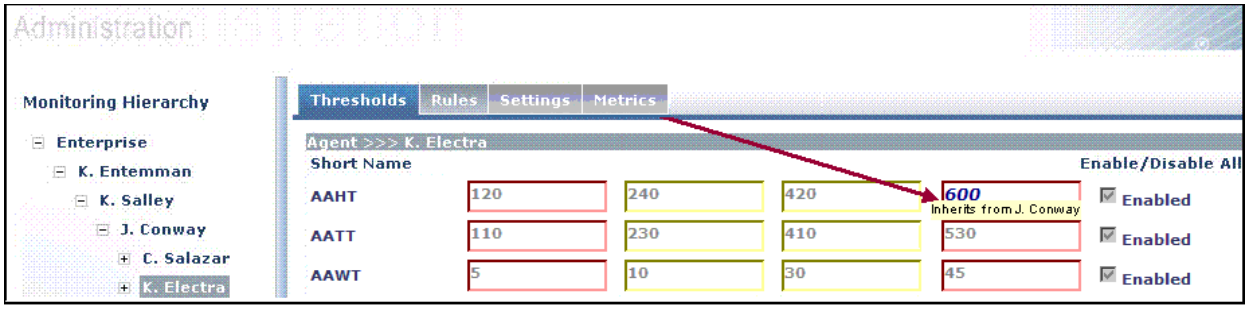

Figure 22: Type 3

This ToolTip (Figure 22) shows that the `Electra/Electronics` node inherits its value of `600` from the override value stored at the `Conway` node

Type 4

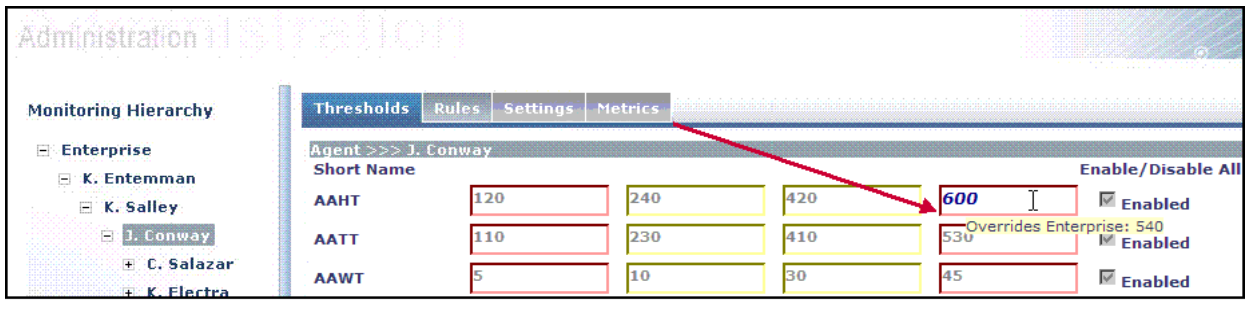

Figure 23: Type 4

This ToolTip (Figure 23) 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 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 group 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 group level in these cases, where groups 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 section:

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 Hierarchy Overview” on page 13.

The sample monitoring hierarchy (Figure 24 on page 40) displays both the groups and monitors in one graphic.

Note: In release 8.1.1, agents can belong to more than one agent group.

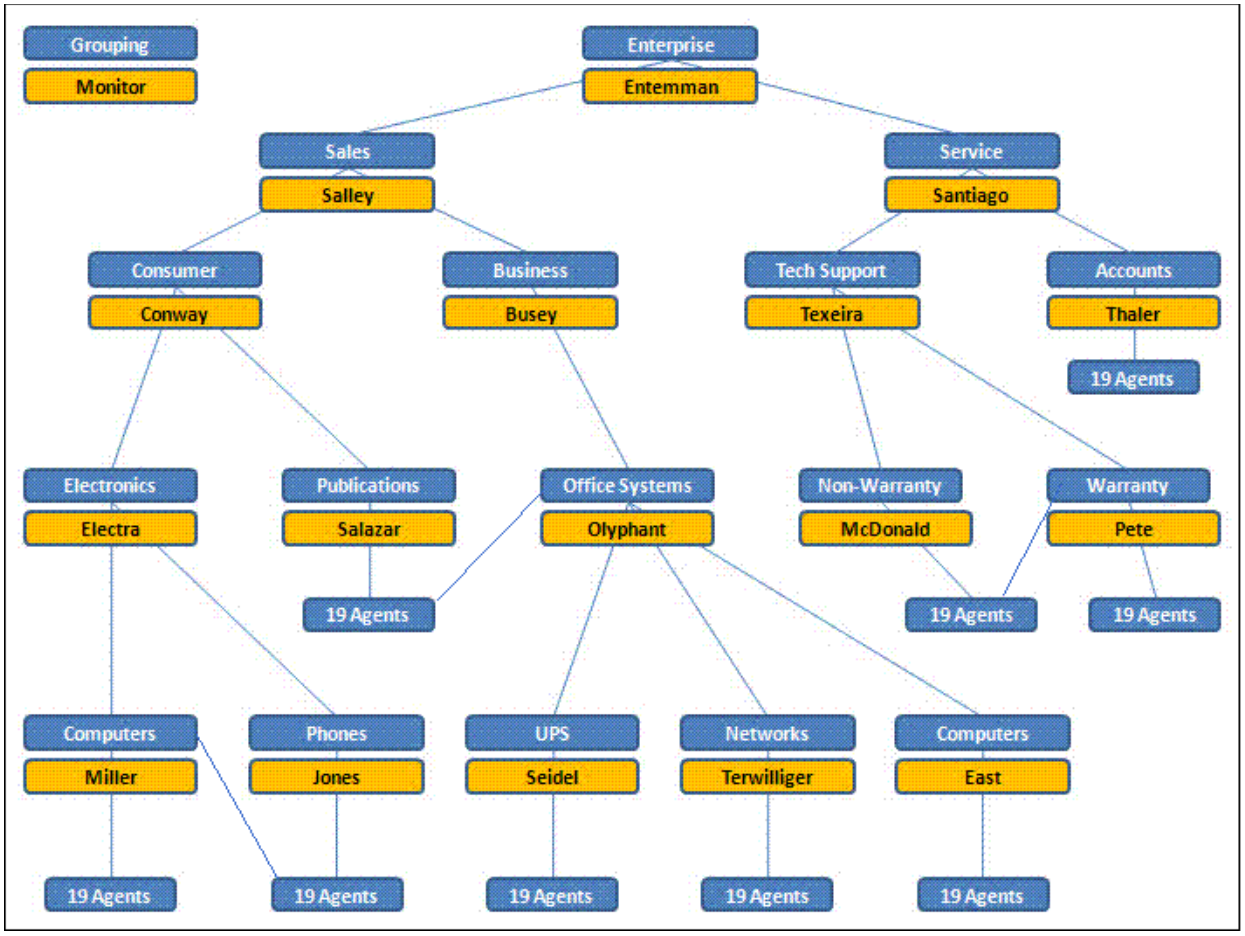

Figure 24: Sample Monitoring Hierarchy—Groups/Monitors

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 “groups” which we do here.

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

The sample monitoring hierarchy has more groups above the group 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 24, 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.

Appendix

C Sample Monitoring Hierarchy

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

The sample monitoring hierarchy has nine groups of nineteen agents in a five-level hierarchy (Figure 25 on page 44).

Groupings

Figure 25 on page 44 shows a hierarchy of groupings.

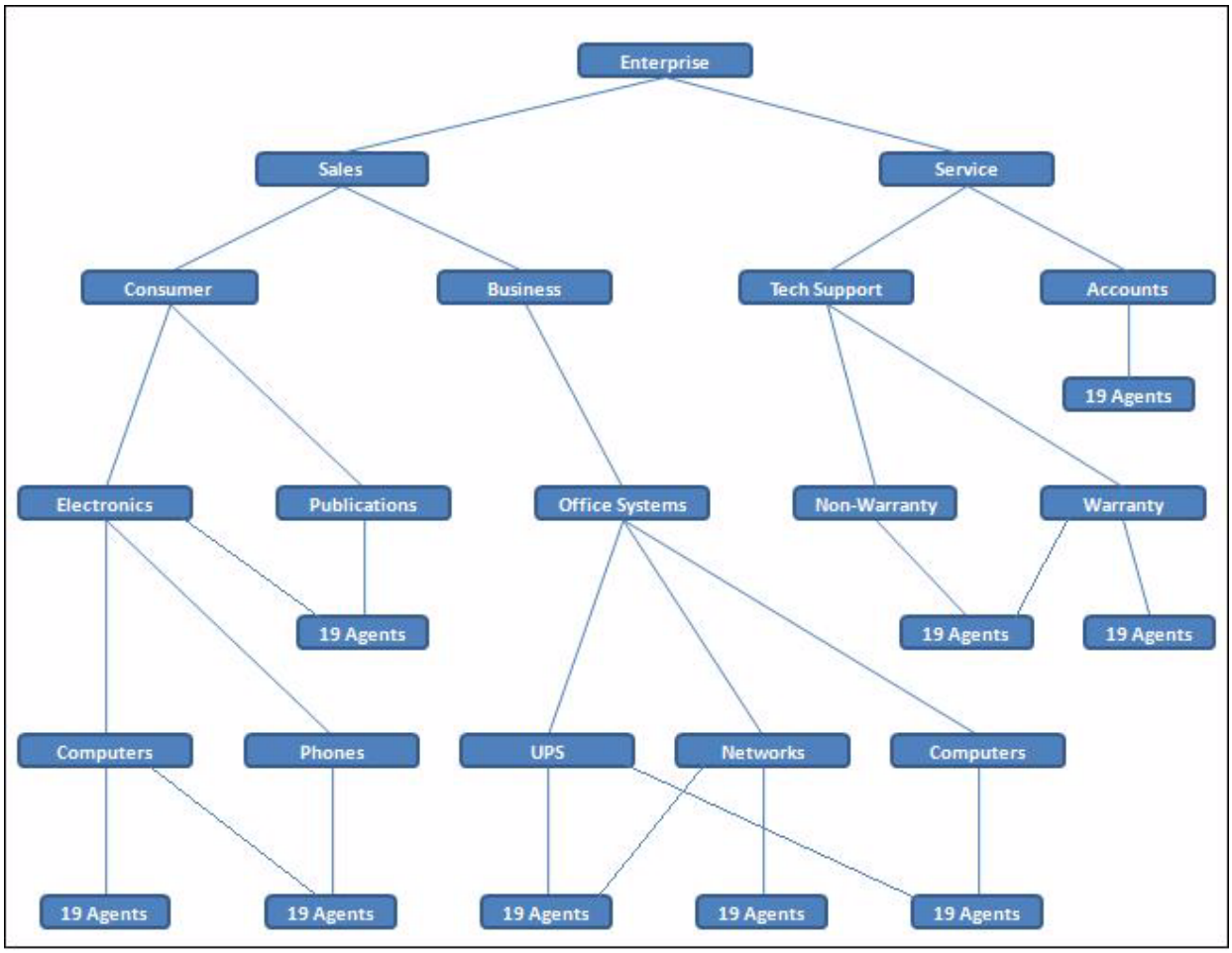

Figure 25: Sample Monitoring Hierarchy

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

Note: In release 8.1.1, agents can belong to more than one agent group.

Monitors

Monitoring information defines which people can monitor which groups in Frontline Advisor. Figure 26 on page 45 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 groups in the `Consumer` subtree,

which consist of the 19 agents on the `Computers` group, the 19 agents on the `Phones` group, and the 19 agents on the `Publications` group.

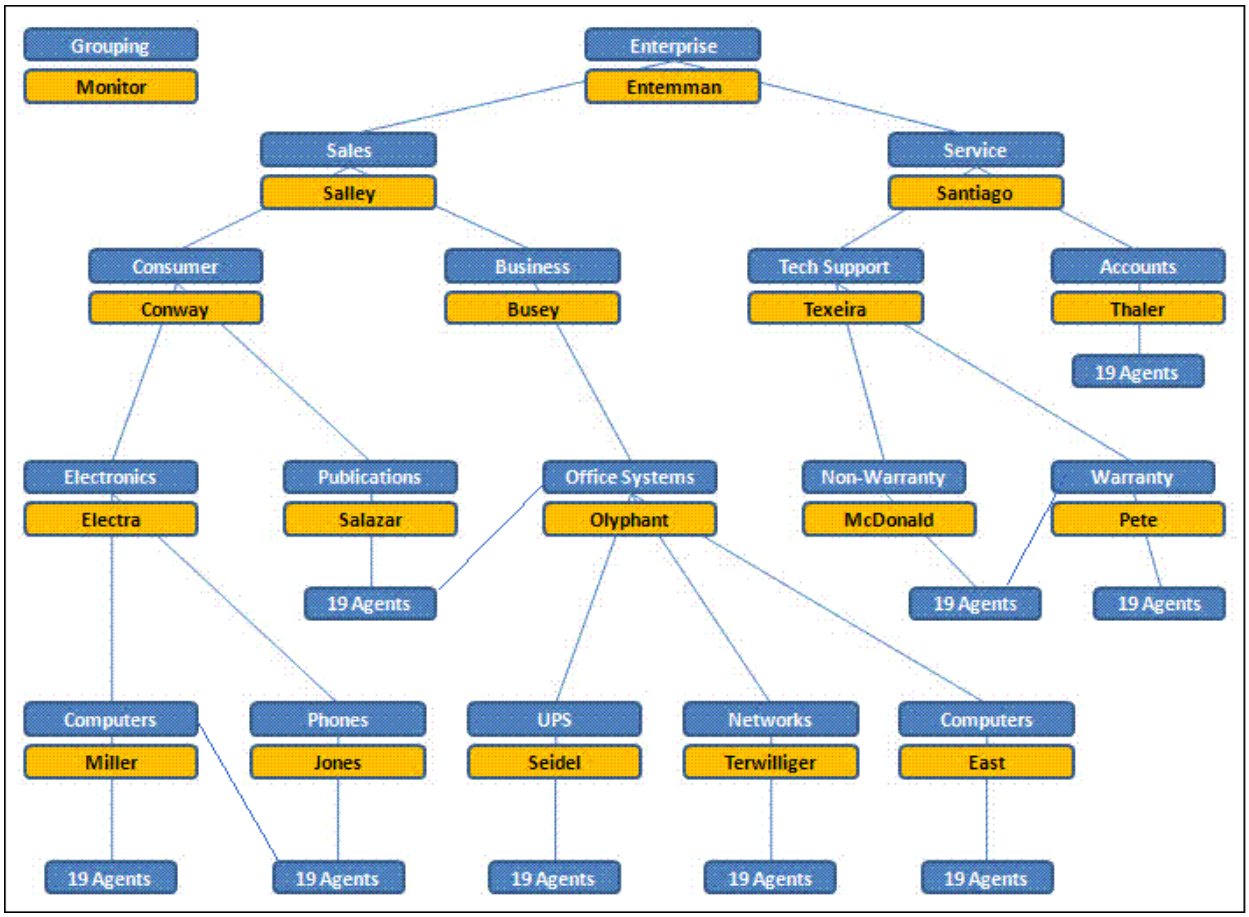

Figure 26: Monitoring Hierarchy

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 8.1 Advisors Deployment Guide* describes how to install and configure all Advisors components.
- *Performance Management Advisors 8.1 Contact Center Advisor & Workforce Advisor Administrator User's Guide* describes how to configure your top-level hierarchy and set up threshold rules/goals and users.
- *Performance Management Advisors 8.1 Contact Center Advisor Help* describes how to personalize your display of information for monitoring and root cause analysis.
- *Performance Management Advisors 8.1 Workforce Advisor Help* describes how to personalize your display of information for monitoring and root cause analysis.
- *Performance Management Advisors 8.1 Frontline Advisor Manager Help* describes how to perform manager functions for Frontline Advisor.
- *Performance Management Advisors 8.1 Frontline Advisor Agent Advisor Help* describes how to perform agent functions for Frontline Advisor.
- *Performance Management Advisors 8.1 Alert Management Help* describes how to manage the actions taken to resolve alerts and use the database to learn and repeat successes.
- *Performance Management Advisors 8.1 Resource Management Help* describes how to maintain skill levels and agents.
- *Performance Management Advisors 8.1 Performance Monitor Help* summarizes how to personalize your display of information for monitoring.

- *Performance Management Advisors 8.1 Workforce What-If Tool Help* 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:

81fr_ref_06-2010_v8.1.001.00

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 50).	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>`

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