Performance Management Advisors 8.1

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 95.

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 Change History

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

Release 8.1.401.00

- New source and computed performance metrics are added. For more information, see Appendix A on page 37 and Appendix B on page 57.
  - The following source metrics are enabled when you migrate to Release 8.1.4:
    - Total Not Ready Time
    - Total Outbound ACW Time
    - Total Other ACD Time
    - Total ACW Time
    - Total Ready Time
    - Total Number of Outbound Calls
    - Total Number of Consult Calls
    - Total Number of Internal Calls
    - Total Time In Outbound Calls
    - Total Time In Consult Calls
    - Total Time In Internal Calls
  - The following source metrics are disabled when you migrate to Release 8.1.4. You must use filters to enable these metrics:
    - Total Not Ready Time - Type *X*
    - Total ACD Inbound ACW Time
    - Total Non ACD Inbound ACW Time
    - Total Number of ACD Calls
    - Total Number of Non ACD Calls
    - Total Time In ACD Calls
    - Total Time In Non ACD Calls

Note: New aggregated metrics that are dependent on a filtered agent-level metric are also disabled until you configure the filters. For information about enabling the filters, see *Genesys Performance Management Advisors 8.1 Deployment Guide*.

Release 8.1.301.00

- Role-Based Access Control – There are additional privileges for Frontline Advisor:
  - FrontlineAdvisor.SupervisorDashboard.TeamsPane.canSort

- FrontlineAdvisor.SupervisorDashboard.TeamAlertsPane.canSort
- FrontlineAdvisor.SupervisorDashboard.AgentAlertsPane.canSort

For descriptions of privileges, see "List of Frontline Advisor Privileges" on page 18.

Note: These new privileges are not defined in any existing Advisors role in the Configuration Server settings. If you are migrating from Advisors Release 8.1.2, an administrative user must update existing roles, or create new roles, and add the privileges to allow the described access or activity.

- The Procedure for defining rules now includes a note about character limitations in descriptions. See Procedure: Defining a rule, on page 31.
- The list of agent metrics that display on the Frontline Advisor user interface now includes a note about the relationship between agent state threshold settings and source metrics. See "Metrics for Agents" on page 49.

Release 8.1.201.00

- Appendices with details of Frontline Advisor metrics have been added—See Appendix A, "Frontline Advisor Metrics," on page 37 and Appendix B on page 57.
- Other appendices have been consolidated into a single appendix dealing with hierarchies—Appendix C, "Working With Monitoring Hierarchies," on page 81.
- Information about role-based access control in Genesys Configuration Manager has been added—"Role-Based Access Control" on page 15.

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 module (Figure 1 on page 14) 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 Module

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 92.

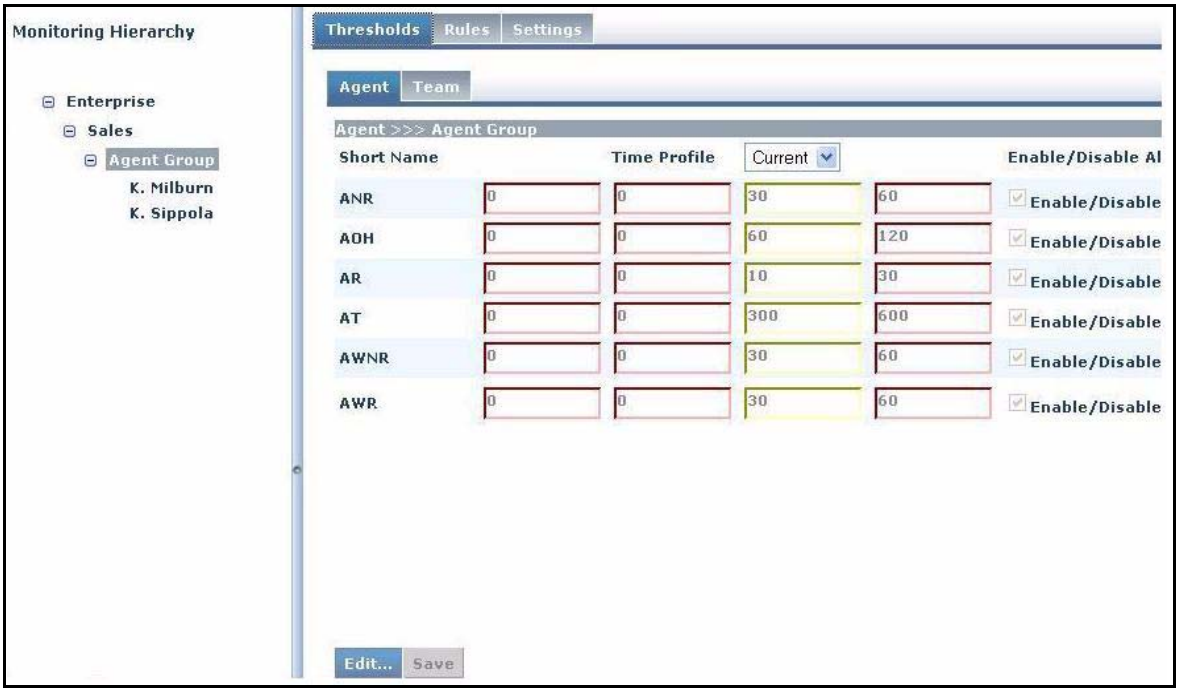

Figure 1: Administration Console

Note: The `Settings` tab is displayed only if the user has explicit role-based access to it granted by an administrator. If such access is granted, it is granted to all settings, not just the ones that relate to the manager’s team of agents.

In the `Thresholds` tab, the user can view and/or override only thresholds where they have access to the corresponding metric.

Access to the metrics and levels in the hierarchy also determines which metrics and levels the user sees in the Administration module. See “Role-Based Access Control” on page 15.

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 Manager Console. The status is visually represented:

Red indicates an active rule alert.

Threshold violations are visible at all levels of the hierarchy, not just at the agent levels. The actual violation at the agent level is highlighted in a solid color and the rolled-up violation at the group 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 are cleared when the agent keeps his behavior corrected and does not 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, manager 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.

Role-Based Access Control

Roles are introduced in release 8.1.2 to refine the level of access that users have to metrics and levels in the hierarchies, and business objects such as the `Teams` pane, the `Team` and `Agent Alerts` panes and the column chooser. Roles are defined, maintained, and associated to users in the Genesys Configuration Server. Please refer to the *Performance Management Advisors 8.1 Contact Center Advisor/Workforce Advisor Administrator User's Guide* for more information.

Hierarchy Access

When managers log in to the dashboard or the Frontline Advisor Administration module, they are presented with a customized view of agent groups and agents relevant to them. However, it is no longer assumed that managers can then navigate to all child nodes simply because they have access to the parent, and vice versa.

So, for example, a group leader sees all teams and agents under them, but might see only the aggregated values at higher-level nodes in the hierarchy.

In order to perform threshold or rule overrides at a given node, the manager must have explicit *change* permission for that node granted by an administrator in the Genesys Configuration Manager. In the above example, the group leader could be granted change access at the group level and below, but not at higher level nodes (which would affect other groups not even visible to that group leader).

Settings

Frontline Advisor users are granted or denied access to settings based on their role-based access, which is configured by an administrator in Genesys Configuration Manager.

In the Frontline Advisor Administration module, this controls whether a user can see and work in the `Settings` tab. If users can view the `Settings` tab, they can view and maintain intervals and time profiles.

Hierarchy Reload Access

If users can view the `Settings` tab, then they might also be able to view the `Hierarchy Reload` section under `Settings`, if they have access to the reload hierarchy.

If users have access to the `Hierarchy Reload` section they can press the `Reload` button to initiate a reload of the FA monitoring hierarchy from the Genesys Configuration Manager.

Frontline Advisors Privileges

Functionality permissions, or privileges, determine what tasks or functions a user can execute on objects to which he/she has access.

Privileges are configured via roles. Privileges for each role are stored as key-value pairs in the `Annex` tab of that role in Genesys Configuration Manager. For example, Figure 2 on page 17 shows the `Annex` tab of a new role called `FA Supervisor` who can view the `Agent Alerts` pane on the Supervisor dashboard:

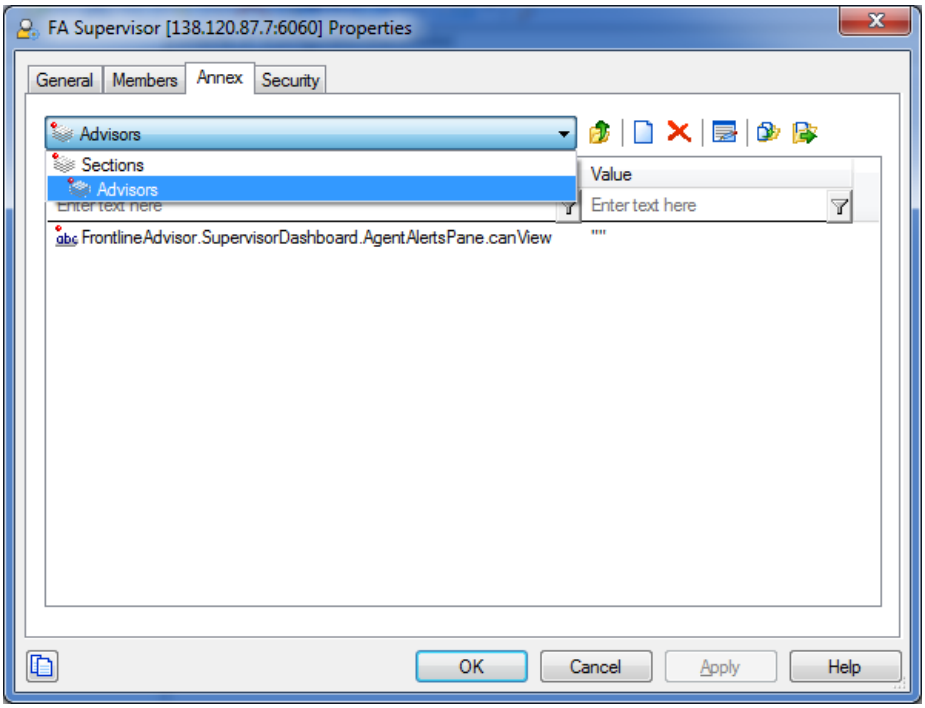

Figure 2: Assigning Privileges to a Role

The privileges for Advisors are bundled under a single section in the `Annex` tab with the title `Advisors`. Each privilege name uses the following general structure:

`[application name].[module name].[task grouping].[privilege name]`

If a privilege is present in a role, then any user assigned that role has access to the functionality controlled by that privilege.

Permissions for Roles

Users should be added under the `Member` tab and permissions are assigned in the `Security` tab.

Add users with either of the following methods:

- Directly, as a member of a Role
- Indirectly, as a member of an Access Group

The user also needs to have Read access to the Role (either directly or through an Access Group).

Accumulation of Privileges

Roles are cumulative. A single user or access group can have multiple roles associated with them. The privileges in these roles are cumulative.

List of Frontline Advisor Privileges

Table 1 lists Frontline Advisor privileges.

Table 1: Advisors Privileges

Privilege	Behavior When Present	Behavior When Absent
FrontlineAdvisor.Supervisor Dashboard.canView	User can access the FA Supervisor Dashboard.	User cannot access the FA Supervisor dashboard, and the FA Dashboard tab is not shown to the user.
FrontlineAdvisor.Supervisor Dashboard.TeamsPane.canView (Requires the FrontlineAdvisor.Supervisor Dashboard.canView privilege)	User can see the Teams pane.	The Teams pane is hidden along with both alerts panes.
FrontlineAdvisor.Supervisor Dashboard.AlertsPane.canView	User can see the Team and Agent Alerts panes.	Neither of the alerts panes is displayed on the dashboard. If access to the Team pane is not available, the Alert pane is not shown even though user has access.
FrontlineAdvisor.Supervisor Dashboard.ColumnChooser.canView (Requires the FrontlineAdvisor.Supervisor Dashboard.canView privilege)	User can access the column chooser.	The column chooser button on the dashboard is hidden.
FrontlineAdvisor.Supervisor Dashboard.TeamsPane.canSort[1]	User can sort the entries in the Team pane. The cursor changes when hovering over the header of a column that can be sorted.	User cannot sort entries in the Team pane. The cursor does not change when hovering over a column header.
FrontlineAdvisor.Supervisor Dashboard.TeamAlertsPane.canSort [1]	User can sort the entries in the Team Alerts pane. The cursor changes when hovering over the header of a column that can be sorted.	User cannot sort entries in the Team Alerts pane. The cursor does not change when hovering over a column header.
FrontlineAdvisor.Supervisor Dashboard.AgentAlertsPane.canSort[1]	User can sort the entries in the Agent Alerts pane. The cursor changes when hovering over the header of a column that can be sorted.	User cannot sort entries in the Agent Alerts pane. The cursor does not change when hovering over a column header.

Table 1: Advisors Privileges (Continued)

Privilege	Behavior When Present	Behavior When Absent
FrontlineAdvisor.Administration.canView	User can access the FA Administration module.	User cannot access the FA Administration module, and the FA Administration tab is not shown to the user.
FrontlineAdvisor.Administration.Settings.canView (Requires FrontlineAdvisor.Administration.canView privilege)	User can access the Settings tab in the FA Admin module.	Settings tab is not shown to the user.
FrontlineAdvisor.Administration.Hierarchy.canReload	User can initiate a hierarchy reload through the action on the Settings tab. (This requires the Settings tab to be accessible via the FrontlineAdvisor.Administration.Settings.canView privilege	Hierarchy reload action is not accessible.
FrontlineAdvisor.AgentDashboard.canView	User can access the FA Agent Dashboard.	User cannot access the FA Agent dashboard, and the FA Agent Dashboard tab is not shown to the user.
FrontlineAdvisor.AgentDashboard.AlertsPane.canView (Requires FrontlineAdvisor.AgentDashboard.canView privilege)	User can see the Alerts pane.	The Alerts pane is not displayed.
FrontlineAdvisor.AgentDashboard.ColumnChooser.canView (Requires FrontlineAdvisor.AgentDashboard.canView privilege)	User can see the Columns pane.	The Columns pane is not displayed.
[1] In a migration scenario, this privilege is not defined in any existing Advisors role in the Configuration Server settings. An administrative user must update existing roles, or create new roles, and add the privilege to allow the described access or activity.		

Further Reading on Roles

Additional sources of information on role-based access are:

- Genesys 8.1 Security Deployment Guide
- Genesys Administrator 8.1 Deployment Guide
- Framework 8.1 Configuration Manager Help
- Framework 8.1 Genesys Administrator Help

Monitoring Hierarchy Overview

If the monitoring hierarchy is new to you, we recommend reading Appendix C, "Working With Monitoring Hierarchies," on page 81 and then coming back to this section.

Hierarchy Loading

When FA is started, the monitoring hierarchy defined in Genesys Configuration Manager is loaded, incorporating any changes made to the hierarchy since the previous load. Since release 8.1.1, all hierarchy maintenance is performed in Genesys Configuration Manager by administrators with the required roles and permissions.

Terminology

From release 8.1.1, the FA hierarchy consists of *groups* and *agents* instead of *supervisors*, *teams*, 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 more than one group if the hierarchy is imported from Configuration Server. If a hierarchy is imported from a third-party HR system, agents can only belong to one group.

Loading Hierarchy from the Persons Folder in Configuration Manager

Generally during installation, you will specify the root for the FA hierarchy as the relevant tenant (the tenant name is case sensitive). However, it is possible during installation to specify the root for the FA hierarchy to be a `Persons` folder in Configuration Manager. If you do this, the hierarchy will be read and loaded from that `Persons` folder at FA (re)start and when the reload feature is used.

This means that the hierarchy views that are specific to a supervisor can be created, meaning that the supervisor can see only their own team's hierarchy.

This also provides the opportunity to enforce uniqueness of names at the level of sibling hierarchy nodes. This in turn means that it is possible to have nodes with the same name (for example, *Sales*) provided they do not have the same parent (that is supervisor).

Role-Based Access Control Impacts

Access permissions are configured at each node of the hierarchy according to roles defined for users by administrators in the Genesys Configuration Manager. These roles determine which nodes of the hierarchy each manager has access to. Users no longer have automatic access to all child nodes of parent nodes to which they have access.

Users can override rules and thresholds only for nodes that they have change access to in Configuration Manager.

When a user logs in, a customized view of the hierarchy is created for them. This view will contain only groups and agents that belong to that manager. Managers may also be able to see nodes and their aggregations that are about those of their team(s), but will require specific change access to those higher-level nodes before they can edit them.

Note: Cisco Adapter requires the agent skill ID of the agent for registering and issuing statistics. This is configured for the agent as the `ExternalId.CISCO` property on the `Annex` tab in the `Advisors` section of the `Agent` object in the Configuration Manager.

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.

Impact of Role-Based Access Control

With the implementation of role-based access control, managers can only enable, disable, and override thresholds and rules to which they have been granted specific change access by administrators in the Genesys Configuration Manager.

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 3). 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 C, “Working With Monitoring Hierarchies,” on page 81) and imported, administrators maintain your access 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, subject to your access permissions.

Figure 3: Monitoring Hierarchy Navigator

Defining Conditions for Metrics

The Thresholds tab (Figure 4 on page 23) allows you to define the critical and acceptable conditions for the metrics to which you have been granted role-based access.

The standard Frontline Advisor 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.

Note: Select a hierarchy node in order to display data in the tab.

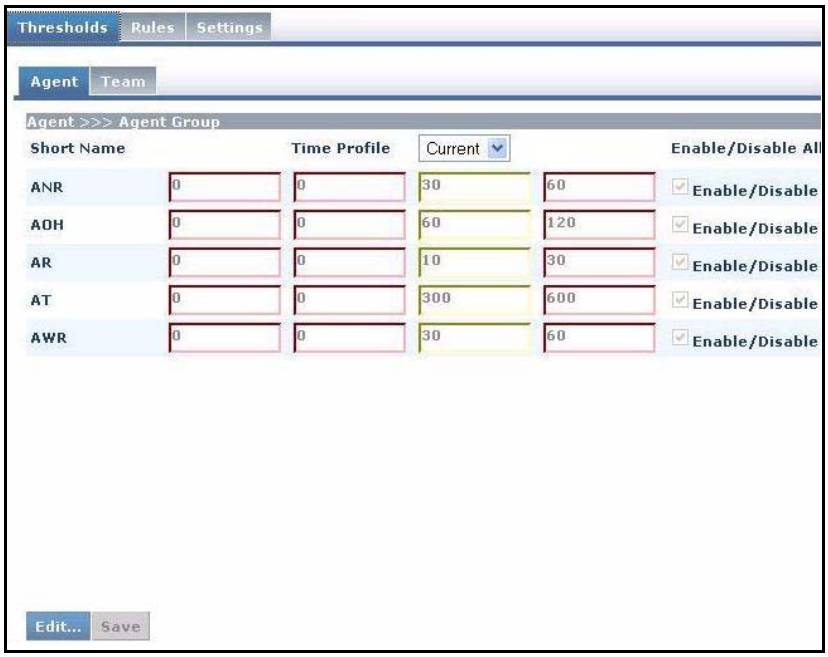

Figure 4: Thresholds Tab

Please refer to Appendix A, “Frontline Advisor Metrics,” on page 37 for metrics definitions and descriptions.

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 5). 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 2 and Figure 5. Red indicates a critical value range. Yellow indicates a warning value range.

Table 2: 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)

Table 2: Alert Thresholds (Continued)

greater than or equal to	the value in the 2nd text box	and less than or equal to	the value in the 3rd text box	then the value is acceptable (no color is displayed)
greater than or equal to	the value in the 1st text box	and less than	the value in the 2nd text box	then the value is warning low (yellow)
less than	the value in the 1st text box			then the value is critical low (red)

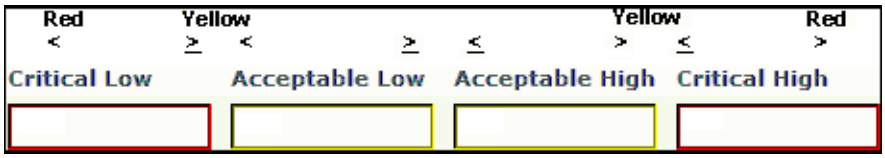

Figure 5: Threshold Bar

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 6)

Figure 6: Threshold Acceptable between Two Values

Example 2 In the example in Figure 7, 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 7: Threshold Without a High Yellow Warning

Example 3 In the example in Figure 8, 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 8: 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, subject to your access permissions. The name of the selected level displays in the title bar.

End of procedure

Example

The top-level node displays default values (Figure 9 on page 26). 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.

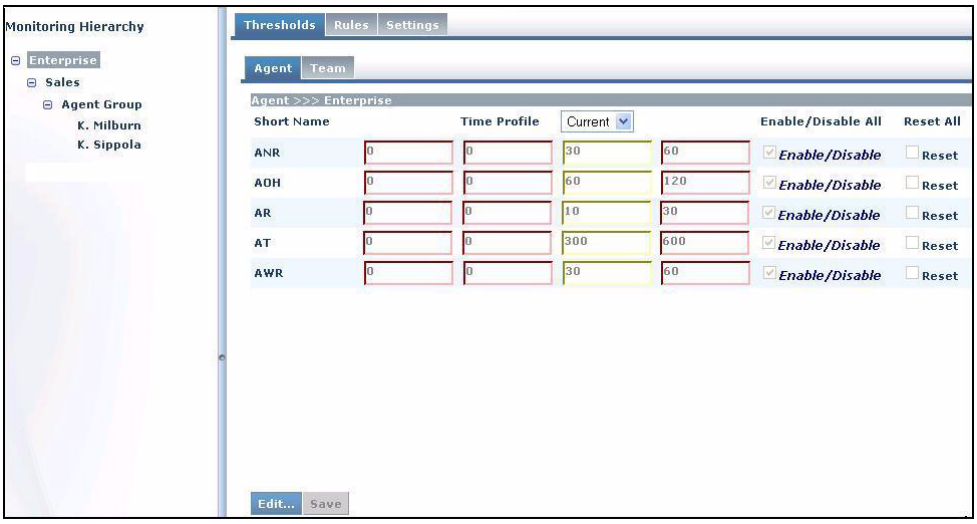

Figure 9: Top Level of the Thresholds Tab

Disable/Override All Thresholds

To disable or override all thresholds at the selected node at once (subject to your access permissions), 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, subject to your access permissions. 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 4).
   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

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 10) allows you to define the conditions that will continuously monitor the agents' statistics, such as short calling. An alert is issued if the conditions of a rule are met. The Frontline Advisor standard

installation provides default values; however, you should review and change them accordingly.

You can modify them (subject to your access permissions) 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.

Note: If you have access to the Rules tab, but you have a Read access permission, then you cannot edit or modify the rules (the Edit button is disabled). If the Administrator gives you a Write or Full Control permission, the Edit button is enabled and you can modify the rules.

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

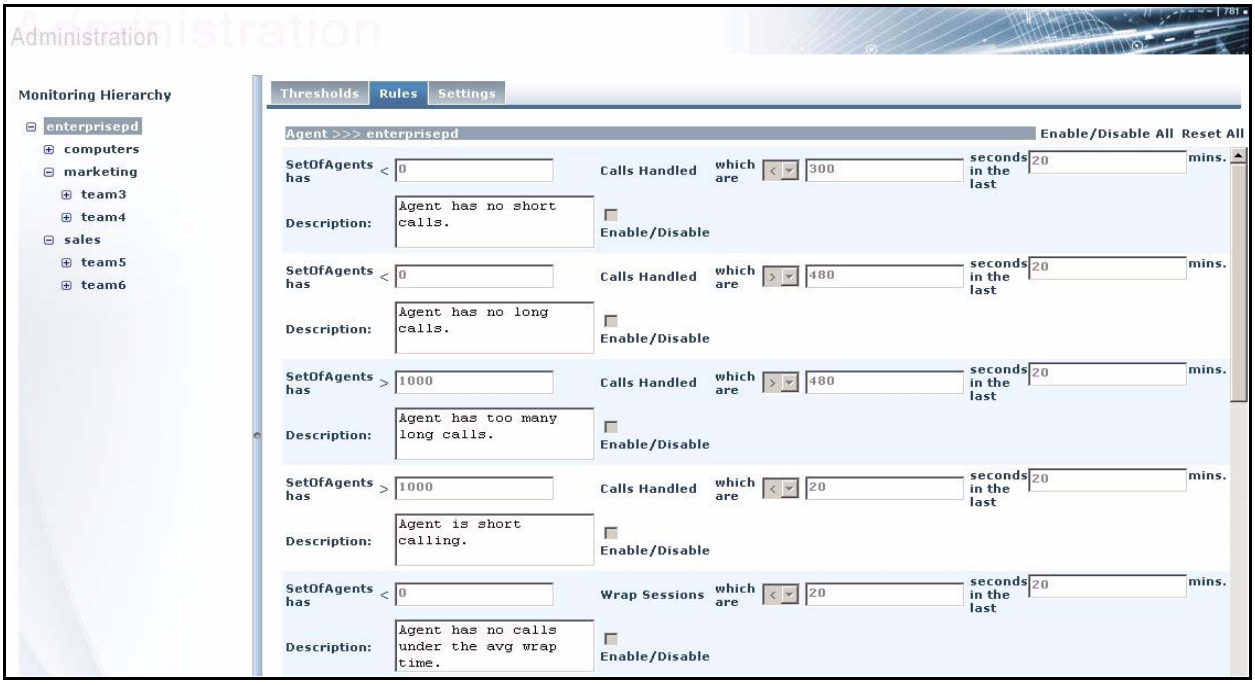

Figure 10: Rules Tab

Note: Select a hierarchy node in order to display data in the 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. See Figure 11 for an example.

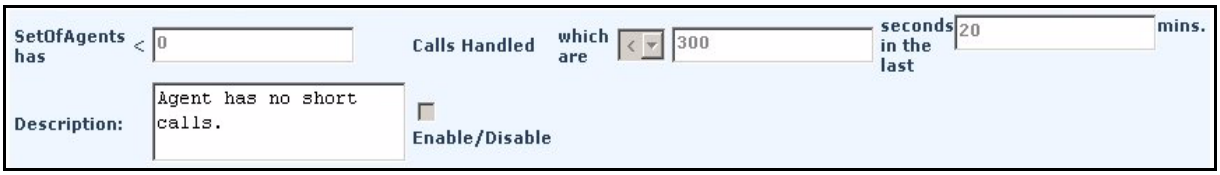

Figure 11: Rule Example

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, and subject to your access permissions. 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

Enable/Disable All Rules

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

Defining Rules

Avoiding Duplication

If the `AgentID` and the `RuleID` of a violation match, FA considers the violation to be duplicated. In all other cases where there is no such match, the rules are considered as two different rules, and the violations as two violations.

When the rule is set at a higher level, it is easy to determine that all child agent groups have the same rule, unless the rule is overridden, and therefore the counts need to be de-duplicated.

However, when the rules are set at the agent-group level, there is no way to determine whether rule sets for sibling agent groups are matched. Therefore, the counts have to be totaled individually.

It is possible for rules between the two such agent groups to differ only slightly, yet they must be counted as distinct violations. If an agent violates the rule in both agent groups, he or she has two rule violations, rather than just one.

To avoid this scenario, rules should be specified at the highest level possible as a best practice.

Procedure: Defining a rule

Start of procedure

1. Select the Rules tab (Figure 10).
   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.

Note: A rule description must not exceed 128 characters. If you enter a text description that exceeds 128 characters, Frontline Advisor fails to save the rule.

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

Cancel

To discard any changes made and revert the contents of 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 12: 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

The `Settings` tab might not be available, depending on your access permissions.

`Note`: Select a hierarchy node in order to display data in the tab.

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).

Notes: 1. Genesys recommends that the time profile values be divisible by either 60 minutes or 10 minutes, otherwise the last interval will be cut short when the midnight reset occurs.

2. The time profile name defined here is the name that displays in the FA dashboard. The time profile name must not exceed 18 characters.

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.

Hierarchy Reload Button

In release 8.1.2, a Hierarchy Reload button enables you to re-import the monitoring hierarchy from the Genesys Configuration Manager database.

Users must be granted access to the Hierarchy Reload section of this page in order to view and use the reload button. See Figure 13.

Warning! Reloading the hierarchy might take up to an hour, and during the reload period Frontline Advisor will be unavailable.

Figure 13: Settings Page

Navigation

ToolTips

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

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

- Types 1 and 2—The value uses the global default because it does not inherit from any override.
- 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

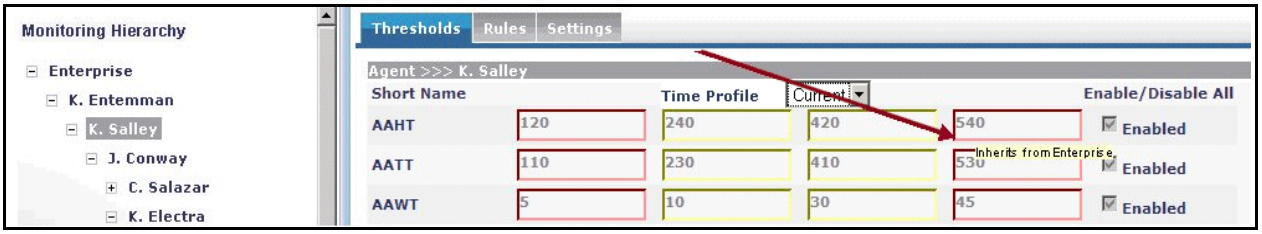

Figure 14: Type 1

This ToolTip (Figure 14) displays if you mouse over the inherited threshold value of 540 from the root node.

Type 2

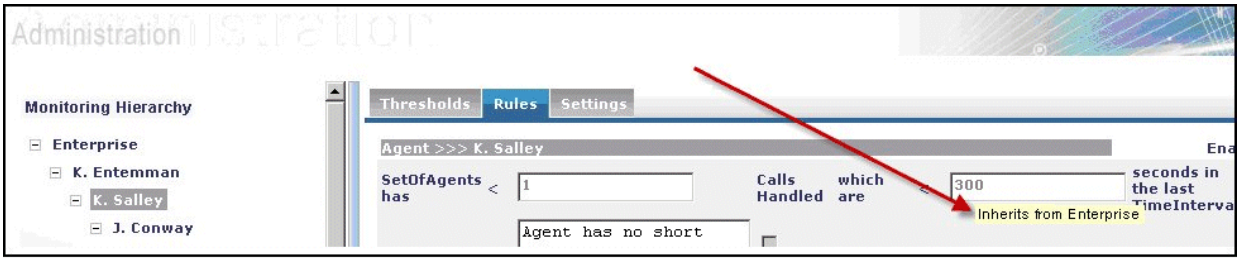

Figure 15: Type 2

This ToolTip (Figure 15) displays if you mouse over the inherited rule value of 300 from the root node.

Type 3

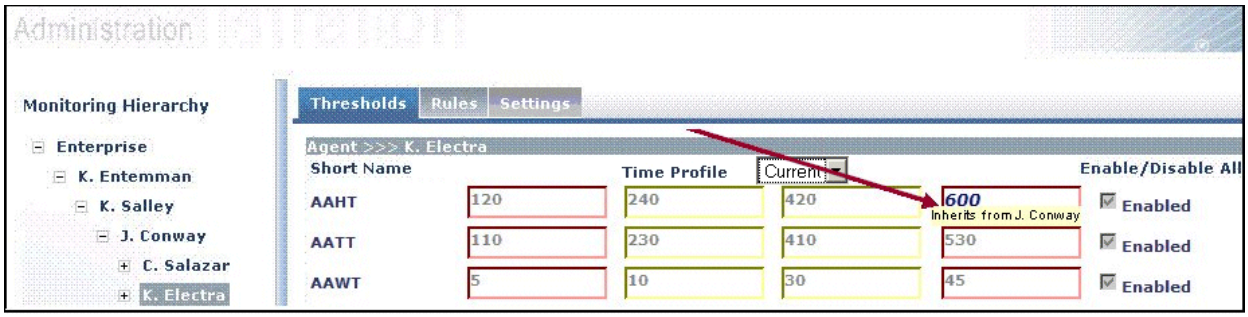

Figure 16: Type 3

This ToolTip (Figure 16) shows that the `Electra/Electronics` node inherits its value of `600` from the override value stored at the `Conway` node.

Type 4

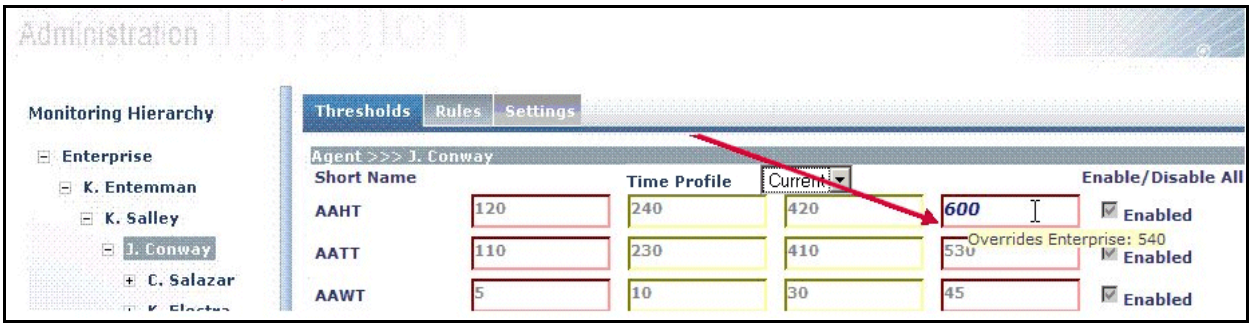

Figure 17: Type 4

This ToolTip (Figure 17) 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)

Appendix

A Frontline Advisor Metrics

The following tables give descriptions and definitions of Frontline Advisor metrics. It contains the following sections:

State Source Metrics

The following tables show the list of source metrics populated by the data contributor(s). These tables also show how the source metrics are populated from the Genesys platform.

Note: The format for the login timestamp is locale specific.
For English it is `HH12:MI:SS AM MM/DD/YYYY`.
For German it is `HH24:MI:SS DD/MM/YYYY`.

Source Metrics Retrieved for Each Agent

The source metrics in Table 3 all relate to stored procedure `FA_Update_State_Source_Metric`.

Table 3: Source Metrics Retrieved for Each Agent

Source Metric Name	Description
CurrentState (state)	The current state of the agent.
LoginTime (loginT)	The login timestamp for an agent.

Table 3: Source Metrics Retrieved for Each Agent (Continued)

Source Metric Name	Description
TimeInCurrentState (stateT)	The time the agent has been in the current state.
ReasonCode (rcode)	Any reasons attached to the current state of the agent.
Current Skill Group (sg)[a]	Current skill group of the agent
Call Type (service)[a]	Call type

a. Current Skill Group and Call Type metrics are available only in the Cisco environment.

Genesys Adapter Statistic Template Definitions for State Metrics

The statistic template definitions in Table 4 all have the `Current` time profile as their default.

Table 4: Genesys Adapter Statistic Template Definitions for State Metrics

Source Metric Name	Genesys Metric Name
CurrentState	Informiam.CurrentAgentState
LoginTime	Informiam.Login_Timestamp
TimeInCurrentState	Informiam.Time_CurrState
ReasonCode	Informiam.Reason_Code

Each of the statistic templates defined above specifies the following values:

```
DBAppSpecificIdColumnName: stateMetricId
```

Performance Source Metrics for Voice and Multimedia

The FA Administrator can set up to three time profiles. The time profiles can be set to any integer from 1 to 1440 and are not confined to a specific set.

Each of the statistic templates defined below specifies the following values:

- `DBAppSpecificIdColumnName: patternNum.`

Note: Filtered metrics are disabled by default. For information about enabling filtered metrics, see *Genesys Performance Management Advisors 8.1 Deployment Guide*.

Table 5: Performance Source Metrics Retrieved for Agents

Source Metric Name	Description	Metric Filter Required
Voice		
CallsHandled (nch)	Number of calls handled by the agent.	None
CallsTransferred (nct)	Number of calls transferred by the agent.	None
LongestTalkTime (ltt)	The longest talk time of calls handled by the agent in the last *xx* minutes.	None
LongestWrapTime (lacw)	The maximum amount of time an agent spent on After Call Work in the last *xx* minutes.	None
Total ACD Inbound ACW Time (ACDInboundACW)[1]	Total amount of time spent performing after-call work for inbound calls.	Yes (Filter for ACD interactions.)
Total ACW Time (totalACW)[1]	Total amount of time spent performing after-call work for all voice calls.	None

Table 5: Performance Source Metrics Retrieved for Agents (Continued)

Source Metric Name	Description	Metric Filter Required
TotalHandleTime (tht)	The total amount of time an agent spent handling calls in the last *xx* minutes. Handle time includes talk time and after-call work.	None
totalLoggedIn[1]	**NOTE:** The totalLoggedIn metric cannot be viewed on the dashboard. The totalLoggedIn metric is used only for intermediate calculations.	None
Total Non ACD Inbound ACW Time (nonACDInbound ACW)[1]	Total amount of time spent performing after-call work for inbound non-ACD calls.	Yes (Filter for non-ACD interactions.)
Total Not Ready Time (totalNotReady)[1]	Total amount of time in the Not Ready state.	None
Total Not Ready Time - Type *X* (totalNotReadyT *X*)[1] **NOTE:** Where *X*=1, 2, 3, ... 9. That is, there are 9 totalNotReadyT source metrics.	The total amount of time in a specific Not Ready state. For example, in your enterprise, the Total Not Ready Time - Type 1 may be the total time spent on breaks.	Yes (Filter for Not Ready Time. One filter required for each Type used. For example, if you define a Total Not Ready Time Type 1 and Total Not Ready Time Type 2, you require two filters.)
Total Number of ACD Calls (ACDCalls)[1]	Total number of ACD calls.	Yes (Filter for ACD interactions.)
Total Number of Consult Calls (consultCalls)[1]	The total number of consult calls.	None
Total Number of Internal Calls (internalCalls)[1]	Total number of internal calls.	None

Table 5: Performance Source Metrics Retrieved for Agents (Continued)

Source Metric Name	Description	Metric Filter Required
Total Number of Non ACD Calls (nonACDCalls)[1]	Total number of non-ACD calls.	Yes (Filter for non-ACD interactions.)
Total Number of Outbound Calls (outboundCalls)[1]	Total number of outbound calls.	None
Total Other ACW Time (otherACW)[1]	Total amount of time spent performing after-call work for internal and consult calls, as well as after-call work that cannot be associated with any call.	None
Total Outbound ACW Time (outboundACW)[1]	Total amount of time spent performing after-call work for outbound calls.	None
Total Ready Time (totalReady)[1]	Total amount of time in the Ready state.	None
TotalTalkTime (ttt)	The total amount of time an agent spent talking on calls in the last *xx* minutes.	None
Total Time In ACD Calls (totalACD)[1]	Total amount of time spent in ACD calls.	Yes (Filter for ACD interactions.)
Total Time In Consult Calls (totalConsult)[1]	Total amount of time spent in consult calls.	None
Total Time In Internal Calls (totalInternal)[1]	Total amount of time spent in internal calls.	None
Total Time In Non ACD Calls (totalNonACD)[1]	Total amount of time spent in non-ACD calls.	Yes (Filter for non-ACD interactions.)
Total Time In Outbound Calls (totalOutbound)[1]	Total amount of time spent in outbound calls.	None

Table 5: Performance Source Metrics Retrieved for Agents (Continued)

Source Metric Name	Description	Metric Filter Required
TotalWrapTime (tacw)	The total amount of time an agent spent handling calls in the last *xx* minutes.	None
Web Chat		
ChatInProcess (wInProc)	Number of chat interactions currently in process for the agent in the last *xx* minutes.	None
ChatAccepted (wAcpt)	Number of chat interactions accepted by the agent in the last *xx* minutes.	None
ChatRejected (wRjct)	Number of chat interactions rejected by the agent in the last *xx* minutes.	None
ChatTimedOut (wTO)	Number of chat interactions timed out for the agent in the last *xx* minutes.	None
ChatTransferred (wTxfrs)	Number of chat interactions transferred by the agent in the last *xx* minutes.	None
ChatHandled (wH)	Number of chat interactions handled by the agent in the last *xx* minutes.	None
ChatOffered (wOffered)	Number of chat interactions offered to the agent in the last *xx* minutes.	None
ChatHandleTime (wHT)	Total handle time for all the chat interactions handled by the agent in the last *xx* minutes.	None

Table 5: Performance Source Metrics Retrieved for Agents (Continued)

Source Metric Name	Description	Metric Filter Required
E-mail		
EmailInProcess (eInProc)	Number of e-mail interactions currently in process for the agent in the last *xx* minutes.	None
EmailAccepted (eAcpt)	Number of e-mail interactions accepted by the agent in the last *xx* minutes.	None
EmailRejected (eRjct)	Number of e-mail interactions rejected by the agent in the last *xx* minutes.	None
EmailTimedOut (eTO)	Number of e-mail interactions timed out for the agent in the last *xx* minutes.	None
EmailTransferred (eTxfrs)	Number of e-mail interactions transferred by the agent in the last *xx* minutes.	None
EmailHandled (eH)	Number of e-mail interactions handled by the agent in the last *xx* minutes.	None
EmailOffered (eOffered)	Number of e-mail interactions offered to the agent in the last *xx* minutes.	None
EmailHandleTime (eHT)	Total handle time for all the e-mail interactions handled by the agent in the last *xx* minutes.	None
[1] Added in Release 8.1.4.		

Genesys Adapter Statistic Template Definitions for Performance Metrics

Each performance metric can be enabled for each of the three configurable Time Profiles. These time profiles can be Sliding or Growing, with any interval desired. (Genesys recommends that the time interval should divide an hour or day evenly.)

Table 6: Genesys Adapter Statistic Template Definitions for Performance Metrics

Source Metric Name	Genesys Metric Name
Voice	
CallsHandled (nch)	Informiam.Interactions_Processed
CallsTransferred (nct)	Informiam.Total_Calls_Transferred
(totalLoggedIn)[1]	Informiam.Total_LoggedIn_Time
LongestTalkTime (ltt)	Informiam.Longest_Call
LongestWrapTime (lacw)	Informiam.Longest_ACWCall
Total ACD Inbound ACW Time (ACDInboundACW)[1]	Informiam.Total_Inbound_ACW_Voice_ Time
Total ACW Time (totalACW)[1]	Informiam.Total_All_ACW_Voice_Time
TotalHandleTime (tht)	Informiam.Total_Handle_Time
Total Non ACD Inbound ACW Time (nonACDInboundACW)[1]	Informiam.Total_Inbound_ACW_Voice_ Time
Total Not Ready Time (totalNotReady)[1]	Informiam.Total_NotReady_Time
Total Not Ready Time - Type *X* (totalNotReadyT *X*)[1]	Informiam.Total_NotReady_Time
Total Number of ACD Calls (ACDCalls)[1]	Informiam.Total_Number_Inbound_ Unknown_Voice_Calls
Total Number of Consult Calls (consultCalls)[1]	Informiam.Total_Number_Consult_Calls
Total Number of Internal Calls (internalCalls)[1]	Informiam.Total_Number_Internal_Voice_ Calls

Table 6: Genesys Adapter Statistic Template Definitions for Performance Metrics (Continued)

Source Metric Name	Genesys Metric Name
Total Number of Non ACD Calls (nonACDCalls)[1]	Informiam.Total_Number_Inbound_Unknown_Voice_Calls
Total Number of Outbound Calls (outboundCalls)[1]	Informiam.Total_Number_Outbound_Voice_Calls
Total Other ACW Time (otherACW)[1]	Informiam.Total_Time_Other_ACW_Voice_Time
Total Outbound ACW Time (outboundACW)[1]	Informiam.Total_Outbound_ACW_Voice_Time
Total Ready Time (totalReady)[1]	Informiam.Total_Ready_Status_Time
TotalTalkTime (ttt)	Informiam.Total_Talk_Time
Total Time In ACD Calls (totalACD)[1]	Informiam.Total_Inbound_Status_Voice_Time
Total Time In Consult Calls (totalConsult)[1]	Informiam.Total_Consult_Status_Time
Total Time In Internal Calls (totalInternal)[1]	Informiam.Total_Internal_Status_Voice_Time
Total Time In Non ACD Calls (totalNonACD)[1]	Informiam.Total_Inbound_Status_Voice_Time
Total Time In Outbound Calls (totalOutbound)[1]	Informiam.Total_Outbound_Status_Voice_Time
TotalWrapTime (tacw)	Informiam.Total_ACW_Time
Web Chat	
ChatInProcess (wInProc)	Informiam.Chat_InProcessing
ChatAccepted (wAcpt)	Informiam.Chat_Accepted
ChatRejected (wRjct)	Informiam.Chat_Total_Rejected
ChatTimedOut (wTO)	Informiam.Chat_Total_TimedOut
ChatTransferred (wTxfrs)	Informiam.Chat_Total_Transferred
ChatHandled (wH)	Informiam.Chat_Total_Handled

Table 6: Genesys Adapter Statistic Template Definitions for Performance Metrics (Continued)

Source Metric Name	Genesys Metric Name
ChatOffered (wOffered)	Informiam.Chat_Total_Offered
ChatHandleTime (wHT)	Informiam.Chat_Total_HandleTime
E-mail	
EmailInProcess (eInProc)	Informiam.Email_InProcessing
EmailAccepted (eAcpt)	Informiam.Email_Accepted
EmailRejected (eRjct)	Informiam.Email_Total_Rejected
EmailTimedOut (eTO)	Informiam.Email_Total_TimedOut
EmailTransferred (eTxfrs)	Informiam.Email_Total_Transferred
EmailHandled (eH)	Informiam.Email_Total_Handled
EmailOffered (eOffered)	Informiam.Email_Total_Offered
EmailHandleTime (eHT)	Informiam.Email_Total_HandlingTime
[1] Added in Release 8.1.4.	

Rule Source Metrics

The rule source metrics in Table 7 are retrieved for each agent, and they all relate to stored procedure `FA_Update_Rule_Source_Metric`.

Table 7: Rule Source Metrics Retrieved Agents

Source Metric Name	Description
Rule 1 – Number of Short Calls (too few)	Number of calls handled in the last *xx* minutes where the talk time of the call was less than a certain amount of time.
Rule 2 – Number of Short Calls (too many)	Number of calls handled in the last *xx* minutes where the talk time of the call was less than a certain amount of time.
Rule 3 – Number of Long Calls (too few)	Number of calls handled in the last *xx* minutes where the talk time of the call was more than a certain amount of time.

Table 7: Rule Source Metrics Retrieved Agents (Continued)

Source Metric Name	Description
Rule 4 – Number of Long Calls (too many)	Number of calls handled in the last *xx* minutes where the talk time of the call was more than a certain amount of time.
Rule 5 – Number of Short Wraps (too few)	Number of calls handled in the last *xx* minutes where the wrap time was less than a certain amount of time.
Rule 6 – Number of Short Wraps (too many)	Number of calls handled in the last *xx* minutes where the wrap time was less than a certain amount of time.
Rule 7 – Number of Long Wraps (too few)	Number of calls handled in the last *xx* minutes where the wrap time was more than a certain amount of time.
Rule 8 – Number of Long Wraps (too many)	Number of calls handled in the last *xx* minutes where the wrap time was more than a certain amount of time.
Rule 9 – Number of Calls Put On Hold (too few)	Number of calls put on hold in the last *xx* minutes.
Rule 10 – Number of Calls Put on Hold (too many)	Number of calls put on hold in the last *xx* minutes.
Rule 11 – Number of Calls Transferred (too few)	Number of calls transferred in the last *xx* minutes.
Rule 12 – Number of Calls Transferred (too many)	Number of calls transferred in the last *xx* minutes.

Genesys Statistic Template Definitions for Rule Source Metrics

Table 8 shows Genesys Adapter statistic template definitions for rule source metrics.

Table 8: Genesys Adapter Statistic Template Definitions for Rule Source

Source Metric Name	Genesys Metric Name
Rule 1 – Number of Short Calls (too few)	Informiam.Interactions_Processed_inTRange
Rule 2 – Number of Short Calls (too many)	Informiam.Interactions_Processed_inTRange
Rule 3 – Number of Long Calls (too few)	Informiam.Interactions_Processed_inTRange
Rule 4 – Number of Long Calls (too many)	Informiam.Interactions_Processed_inTRange
Rule 5 – Number of Short Wraps (too few)	Informiam.Total_ACW_Calls_inTRange
Rule 6 – Number of Short Wraps (too many)	Informiam.Total_ACW_Calls_inTRange
Rule 7 – Number of Long Wraps (too few)	Informiam.Total_ACW_Calls_inTRange
Rule 8 – Number of Long Wraps (too many)	Informiam.Total_ACW_Calls_inTRange
Rule 9 – Number of Calls Put On Hold (too few)	Informiam.Total_Calls_On_Hold
Rule 10 – Number of Calls Put on Hold (too many)	Informiam.Total_Calls_On_Hold
Rule 11 – Number of Calls Transferred (too few)	Informiam.Total_Calls_Transferred
Rule 12 – Number of Calls Transferred (too many)	Informiam.Total_Calls_Transferred

Each of the statistic templates defined above specifies the following values:

- `DBAppSpecificIdColumnName: ruleId`

For all the rule statistic templates, the default time range and default time profile are not defined. When a statistic based on a rule statistic template is issued, FA passes across both the time profile and the time range as overrides. These values are based on the settings of the rule for that particular agent.

UI Displayed Metrics

The tables in this section show the list of source metrics displayed on the user interface. This section also shows how some of the source metrics are translated into calculated metrics which are displayed on the UI. These metrics are defined in the `FA_Threshold_Patterns` and `FA_State_Metrics` tables for performance and state metrics respectively.

Notes:
1. The `Type` column defines whether the metric is sourced directly from a source metric (*raw*), or whether it is calculated from a set of source metrics (*calc*).
2. The `Calculation` column states the formula used to calculate the metric using the source metric value defined for the agent. The team and supervisor calculations are based on the source metric value defined for all the agents under the respective team or the supervisor

For multimedia metrics the metric internal names contain prefixes indicating the following:

- `w`—web chat
- `e`—e-mail

Multimedia metrics (e-mail & web chat) are available only in a Genesys environment.

Metrics for Agents

Table 9 and Table 10 shows state and performance metrics displayed for agents.

Table 9: State Metrics Displayed for Agents

Metric Name	Type	Calculation
CurrentState (state)	Raw	N/A
LoginTime (loginT)	Raw	N/A
TimeInCurrentState (stateT)	Raw	N/A
ReasonCode (rcode)	Raw	N/A

Table 9: State Metrics Displayed for Agents (Continued)

Metric Name	Type	Calculation
Current Skill Group (sg)[a]	Raw	N/A
*Call Type (service)[a]	Raw	N/A

a. Current Skill Group and Call Type metrics are application only in the Cisco environment.

`Agent ID` and `Alert State` display in the Column Chooser with other agent state metrics, but they are not source metrics. `Agent ID` is part of the agent information fetched when FA loads the hierarchy. `Alert Status` is based on the number of rule violations for an agent.

Note: The following agent state thresholds (which you can define in the Frontline Advisor Admin) are evaluated based on the CurrentState (state) and TimeInCurrentState (stateT) source metrics:

- AgentNotReady (ANR)
- AgentonHold (AOH)
- AgentReady (AR)
- AgentTalking (AT)
- AgentWorkNotReady (AWNR)
- AgentWorkReady (AWR)

There is not a one-to-one relationship between each agent state threshold and a source metric. The agent state thresholds apply only when the agent is in one of the preceding states. For example, when the agent is on hold, the AOH threshold is evaluated against the time the agent remains on hold. This contrasts with performance thresholds where there is a one-to-one association between threshold and metric. For example, you can specify thresholds for Average Handle Time (AHT) for an agent. That threshold is evaluated against the associated AHT source metric.

Table 10: Performance Metrics (Voice/Multimedia) Displayed for Agents

Metric Name	Type	Calculation
Voice		
CallsHandled (nch)	Raw	N/A
CallsTransferred (nct)	Raw	N/A
LongestTalkTime (ltt)	Raw	N/A

Table 10: Performance Metrics (Voice/Multimedia) Displayed for Agents (Continued)

Metric Name	Type	Calculation
LongestWrapTime (lacw)	Raw	N/A
% of Time in ACD Inbound (pctACDInbound)[1]	Calc	100*totalACD/totalLoggedIn **NOTE:** Dependent on filtered agent-level metrics. This metric is disabled by default.
% of Time in Non-ACD Inbound (pctNonACDInbound)[1]	Calc	100*totalNonACD/totalLoggedIn **NOTE:** Dependent on filtered agent-level metrics. This metric is disabled by default.
% of Time in Consult (pctConsult)[1]	Calc	100*totalConsult/totalLoggedIn
% of Time in Internal (pctInternal)[1]	Calc	100*totalInternal/totalLoggedIn
% of Time in Outbound (pctOutbound)[1]	Calc	100*totalOutbound/total LoggedIn
AverageHandleTime (aht)	Calc	Talk Time + Wrap Time + Hold Time
AverageTalkTime (att)	Calc	ttt/nch
AverageWrapTime (aacw)	Calc	tacw/nch
Consult Average Handle Time (avgConsult)[1]	Calc	totalConsult/consultCalls
Inbound ACD Average Handle Time (avgACDInbound)[1]	Calc	totalACD/ACDCalls **NOTE:** Dependent on filtered agent-level metrics. This metric is disabled by default.
Inbound Non-ACD Average Handle Time (avgNonACDInbound)[1]	Calc	totalNonACD/nonACDCalls **NOTE:** Dependent on filtered agent-level metrics. This metric is disabled by default.
Internal Average Handle Time (avgInternal)[1]	Calc	totalInternal/internalCalls

Table 10: Performance Metrics (Voice/Multimedia) Displayed for Agents (Continued)

Metric Name	Type	Calculation
Outbound Average Handle Time (avgOutbound)[1]	Calc	totalOutbound/outboundCalls
Web Chat		
ChatInProcess (wInProc)	Raw	N/A
ChatAccepted (wAcpt)	Raw	N/A
ChatRejected (wRjct)	Raw	N/A
ChatPercentageRejected (wRjctPct)	Calc	(wRjct)*100/(wOffered)
ChatTimedOut (wTO)	Raw	N/A
ChatPercentageTimedOut (wTOPct)	Calc	(wTO)*100/ (wOffered)
ChatTransferred (wTxfrs)	Raw	N/A
ChatHandled (wH)	Raw	N/A
ChatOffered (wOffered)	Raw	N/A
ChatHandleTime (wHT)	Raw	N/A
ChatAverageHandleTime (wAHT)	Calc	wHT/ wH
E-mail		
EmailInProcess (eInProc)	Raw	N/A
EmailAccepted (eAcpt)	Raw	N/A
EmailRejected (eRjct)	Raw	N/A
EmailPercentageRejected (eRjctPct)	Calc	(eRjct)*100/(eOffered)
EmailTimedOut (eTO)	Raw	N/A
EmailPercentageTimedOut (eTOPct)	Calc	(eTO)*100/(eOffered)
EmailTransferred (eTxfrs)	Raw	N/A

Table 10: Performance Metrics (Voice/Multimedia) Displayed for Agents (Continued)

Metric Name	Type	Calculation
EmailHandled (eH)	Raw	N/A
EmailOffered (eOffered)	Raw	N/A
EmailHandleTime (eHT)	Raw	N/A
EmailAverageHandleTime (eAHT)	Calc	eHT/ eH
[1] Added in Release 8.1.4.		

Metrics for Teams and Supervisors

Table 11 and Table 12 show state and performance metrics for teams and supervisors.

Table 11: State Metrics for Teams and Supervisors

Metric Name	Type	Calculation
AgentsInLoggedState (Logged)	Calc	COUNT(Agents in the team) where state=1 (Logged In)
AgentsInNotReadyState (Not Ready)	Calc	COUNT(Agents in the team) where state=113 (Not Ready)
AgentsInReadyState (Ready)	Calc	COUNT(Agents in the team) where state=115 (Ready)
AgentsInTalkingState (Talking)	Calc	COUNT(Agents in the team) where state=107 (Talking)
AgentsInAfterCallWorkState (Wrap)	Calc	COUNT(Agents in the team) where state=117 (After call work)
AgentsInHoldState (Hold)	Calc	COUNT(Agents in the team) where state=110 (Hold)
TotalNumberOfAgents (Total)	Calc	COUNT(Agents in the team)

Table 12: Performance Metrics (Voice/Multimedia) for Teams and Supervisors

Metric Name	Type	Calculation (Using Source Metrics)
Voice		
% of Time in ACD Inbound (pctACDInbound)[1]	Calc	100*totalACD/totalLoggedIn **NOTE:** Dependent on filtered agent-level metrics. This metric is disabled by default.
% of Time in Non-ACD Inbound (pctNonACDInbound)[1]	Calc	100*totalNonACD/totalLoggedIn **NOTE:** Dependent on filtered agent-level metrics. This metric is disabled by default.
% of Time in Consult (pctConsult)[1]	Calc	100*totalConsult/totalLoggedIn
% of Time in Internal (pctInternal)[1]	Calc	100*totalInternal/totalLoggedIn
% of Time in Outbound (pctOutbound)[1]	Calc	100*totalOutbound/total LoggedIn
CallsHandled (tnch)	Calc	SUM(nch)
CallsTransferred (tnct)	Calc	SUM(nct)
Consult Average Handle Time (avgConsult)[1]	Calc	totalConsult/consultCalls
Inbound ACD Average Handle Time (avgACDInbound)[1]	Calc	totalACD/ACDCalls **NOTE:** Dependent on filtered agent-level metrics. This metric is disabled by default.
Inbound Non-ACD Average Handle Time (avgNonACDInbound)[1]	Calc	totalNonACD/nonACDCalls **NOTE:** Dependent on filtered agent-level metrics. This metric is disabled by default.
Internal Average Handle Time (avgInternal)[1]	Calc	totalInternal/internalCalls

Table 12: Performance Metrics (Voice/Multimedia) for Teams and Supervisors (Continued)

Metric Name	Type	Calculation (Using Source Metrics)
LongestTalkTime (tltt)	Calc	MAX(ltt)
LongestWrapTime (tlacw)	Calc	MAX(lacw)
Outbound Average Handle Time (avgOutbound)[1]	Calc	totalOutbound/outboundCalls
AverageHandleTime (taht)	Calc	SUM(tht)/SUM(nch)
AverageTalkTime (tatt)	Calc	SUM(ttt)/SUM(nch)
AverageWrapTime (taacw)	Calc	SUM(tacw)/SUM(nch)
Web Chat		
ChatInProcess (team_wInProc)	Calc	SUM(wInProc)
ChatAccepted (team_wAcpt)	Calc	SUM(wAcpt)
ChatRejected (team_wRjct)	Calc	SUM(wRjct)
ChatPercentageRejected (team_wRjctPct)	Calc	SUM(wRjct)*100/SUM (wOffered)
ChatTimedOut (team_wTO)	Calc	SUM(wTO)
ChatPercentageTimedOut (team_wTOPct)	Calc	SUM(wTO)*100/SUM (wOffered)
ChatTransferred (team_wTxfrs)	Calc	SUM(wTxfrs)
ChatHandled (team_wH)	Calc	SUM(wH)
ChatOffered (team_wOffered)	Calc	SUM(wOffered)
ChatHandleTime (team_wHT)	Calc	SUM(wHT)
ChatAverageHandleTime (team_wAHT)	Calc	SUM(wHT)/SUM(wH)
E-mail		
EmailInProcess (team_eInProc)	Calc	SUM(eInProc)
EmailAccepted (team_eAcpt)	Calc	SUM(eAcpt)
EmailRejected (team_eRjct)	Calc	SUM(eRjct)

Table 12: Performance Metrics (Voice/Multimedia) for Teams and Supervisors (Continued)

Metric Name	Type	Calculation (Using Source Metrics)
EmailPercentageRejected (team_eRjctPct)	Calc	SUM(eRjct)*100/ SUM(eOffered)
EmailTimedOut (team_eTO)	Calc	SUM(eTO)
EmailPercentageTimedOut (team_eTOPct)	Calc	SUM(eTO)*100/SUM(eOffered)
EmailTransferred (team_eTxfrs)	Calc	SUM(eTxfrs)
EmailHandled (team_eH)	Calc	SUM(eH)
EmailOffered (team_eOffered)	Calc	SUM(eOffered)
EmailHandleTime (team_eHT)	Calc	SUM(eHT)
EmailAverageHandleTime (team_eAHT)	Calc	SUM(eHT)/SUM(eH)
[1] Added in Release 8.1.4.		

Appendix

B Stat Server Metrics

Table 13 lists Stat Server metrics.

Table 13: Stat Server Metrics

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

Table 13: Stat Server Metrics (Continued)

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

Table 13: Stat Server Metrics (Continued)

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

Table 13: Stat Server Metrics (Continued)

Metric ID	Stat Server Metric Name	Definition	Conversion Type
10	Informiam.CurrentReadyAgents	Category=CurrentNumber	None
		MainMask=*, ~NotReadyForNextCall, ~LoggedOut, ~NotMonitored	
		Objects=GroupAgents, GroupPlaces	
		Subject=AgentStatus	
11	Informiam.CurrMaxCallWaiting Time	Category=CurrentMaxTime	None
		MainMask=CallWait	
		Objects=Queue, RoutePoint, GroupQueues	
		Subject=DNAction	
12	Informiam.CurrNumberACW Statuses	Category=CurrentNumber	None
		MainMask=AfterCallWork	
		Objects=GroupAgents, GroupPlaces	
		Subject=AgentStatus	
13	Informiam.CurrNumberHold Statuses	Category=CurrentNumber	None
		MainMask=CallOnHold	
		Objects=GroupAgents, GroupPlaces	
		Subject=AgentStatus	

Table 13: Stat Server Metrics (Continued)

Metric ID	Stat Server Metric Name	Definition	Conversion Type
14	Informiam.CurrNumberNotReady Statuses	Category=CurrentNumber	None
		MainMask=NotReadyForNextCall	
		Objects=GroupAgents, GroupPlaces	
		Subject=AgentStatus	
15	Informiam.CurrNumberReady Statuses	Category=CurrentNumber	None
		MainMask=WaitForNextCall	
		Objects=GroupAgents, GroupPlaces	
		Subject=AgentStatus	
16	Informiam.CurrNumberWaiting Calls	Category=CurrentNumber	None
		Description=Current Number of Calls waiting in Queue	
		Formula=DCID	
		MainMask=CallWait	
		Objects=Queue, RoutePoint, GroupQueues	
		Subject=DNAction	

Table 13: Stat Server Metrics (Continued)

Metric ID	Stat Server Metric Name	Definition	Conversion Type
91	Informiam.CurrentNumber Handling	Category=CurrentNumber	None
		MainMask=CallInbound, CallInternal, Call Consult, CallUnknown, CallOnHold, CallOutbound	
		Objects=Agent, GroupAgents	
		Subject=AgentStatus	
17	Informiam.CurrTotalLoginTime	Category=CurrentContinuousTime	None
		MainMask=*, ~LoggedOut	
		Objects=Agent	
		Subject=AgentStatus	
18	Informiam.Calls_Received_ Inbound	Category=TotalNumber	None
		MainMask=CallInbound	
		Objects=Agent, Place, GroupAgents, GroupPlaces	
		Subject=Action	
		Media Type=Voice	

Table 13: Stat Server Metrics (Continued)

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

Table 13: Stat Server Metrics (Continued)

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

Table 13: Stat Server Metrics (Continued)

Metric ID	Stat Server Metric Name	Definition	Conversion Type
23	Informiam.ServiceLevelCallsOnHold_Total	Category=TotalNumberInTimeRange	None
		MainMask=CallWait	
		Objects=Queue, RoutePoint, GroupQueues	
		Subject=DNAction	
100	Informiam.Time_CurrState	Category=CurrentTime	None
		MainMask=*	
		Objects=Agent	
		Subject=AgentStatus	
106	Informiam.Total_ACW_Calls_inTRange	Category=TotalNumberInTimeRange	None
		MainMask=AfterCallWork	
		Objects=Agent	
		Subject=DNAction	
112	Informiam.Interactions_Processed_inTRange	Category=TotalNumberInTimeRange	None
		MainMask=CallInbound	
		Objects=Agent	
		Subject=Action	

Table 13: Stat Server Metrics (Continued)

Metric ID	Stat Server Metric Name	Definition	Conversion Type
24	Informiam.Total_ACW_Time	Category=TotalTime	None
		MainMask=AfterCallWork	
		Objects=Agent, Place, GroupAgents, GroupPlaces	
		Subject=DNAction	
90	Informiam.TotalNumberACW	Category=TotalNumber	None
		MainMask=AfterCallWork	
		Objects=Agent, GroupAgents	
		Subject=DNAction	
		MediaType=voice	
500	Informiam.Total_Inbound_ACW_Voice_Time[1]	Category=TotalAdjustedTime	None
		MainMask=AfterCallWorkInbound	
		Objects=Agent, Place, GroupAgents, GroupPlaces	
		Subject=DNStatus	
		MediaType=voice	

Table 13: Stat Server Metrics (Continued)

Metric ID	Stat Server Metric Name	Definition	Conversion Type
501	Informiam.Total_Outbound_ ACW_Voice_Time[1]	Category=TotalAdjustedTime	None
		MainMask=AfterCallWorkOutbound	
		Objects=Agent, Place, GroupAgents, GroupPlaces	
		Subject=DNStatus	
		MediaType=voice	
502	Informiam.Total_Time_Other_ ACW_Voice_Time[1]	Category=TotalAdjustedTime	None
		MainMask=AfterCallWorkUnknown, AfterCallWorkInternal, AfterCallWorkConsult	
		Objects=Agent, Place, GroupAgents, GroupPlaces	
		Subject=DNStatus	
		MediaType=voice	

Table 13: Stat Server Metrics (Continued)

Metric ID	Stat Server Metric Name	Definition	Conversion Type
503	Informiam.Total_All_ACW_Voice_Time[1]	Category=TotalAdjustedTime	None
		MainMask=AfterCallWorkInbound, AfterCallWorkUnknown, AfterCallWorkInternal, AfterCallWorkConsult,AfterCallWork Outbound	
		Objects=Agent, Place, GroupAgents, GroupPlaces	
		Subject=DNStatus	
		MediaType=voice	
25	Informiam.Total_Calls_Abandoned	Category=TotalNumber	None
		Description=Total number of new calls abandoned	
		MainMask=CallAbandonedFromRingingInbound, CallAbandonedFromRingingUnknown, CallAbandonedInbound, CallAbandonedUnknown	
		Objects=GroupQueues, Queue, RoutePoint	
		Subject=DNAction	

Table 13: Stat Server Metrics (Continued)

Metric ID	Stat Server Metric Name	Definition	Conversion Type
26	Informiam.Total_Calls_Answered	Category=TotalNumber	None
		Description=Total number of new calls answered	
		Formula=DCID	
		MainMask=CallAnsweredInbound, CallAnsweredUnknown	
		Objects=GroupQueues, Queue, RoutePoint	
		Subject=DNAction	
27	Informiam.Total_Calls_Inbound	Category=TotalNumber	None
		Description=Total number of new calls distributed	
		Formula=DCID	
		MainMask=CallEnteredInbound, CallEnteredUnknown	
		Objects=GroupQueues, Queue, RoutePoint	
		Subject=DNAction	

Table 13: Stat Server Metrics (Continued)

Metric ID	Stat Server Metric Name	Definition	Conversion Type
108	Informiam.Total_Calls_On_Hold	Category=TotalNumber	None
		MainMask=CallOnHold	
		Objects=Agent, Place, GroupAgents, GroupPlaces	
		Subject=DNAction	
101	Informiam.Total_Calls_ Transferred	Category=TotalNumber	None
		MainMask=CallTransferMade	
		Objects=Agent	
		Subject=Action	
104	Informiam.Total_Handle_Time	Category=TotalTime	None
		MainMask= CallInbound, CallInternal, CallConsult, CallUnknown, AfterCallWork	
		Objects=Agent, Place, GroupAgents, GroupPlaces	
		Subject=DNAction	

Table 13: Stat Server Metrics (Continued)

Metric ID	Stat Server Metric Name	Definition	Conversion Type
505	Informiam.Total_Number_ Inbound_Unknown_Voice_Calls[1]	Category=TotalNumber	None
		MainMask=CallInbound, CallUnknown	
		Objects=RegDN, Agent, Place, GroupAgents, GroupPlaces	
		Subject=DNAction	
		MediaType=voice	
506	Informiam.Total_Number_ Outbound_Voice_Calls[1]	Category=TotalNumber	None
		MainMask=CallOutbound	
		Objects=RegDN, Agent, Place, GroupAgents, GroupPlaces	
		Subject=DNAction	
		MediaType=voice	
507	Informiam.Total_Number_ Consult_Calls[1]	Category=TotalNumber	None
		MainMask=CallConsult	
		Objects=RegDN, Agent, Place, GroupAgents, GroupPlaces	
		Subject=DNAction	

Table 13: Stat Server Metrics (Continued)

Metric ID	Stat Server Metric Name	Definition	Conversion Type
508	Informiam.Total_Number_Internal_Voice_Calls[1]	Category=TotalNumber	None
		MainMask=CallInternal	
		Objects=RegDN, Agent, Place, GroupAgents, GroupPlaces	
		Subject=DNAction	
		MediaType=voice	
509	Informiam.Total_Inbound_Status_Voice_Time[1]	Category=TotalTime	None
		MainMask=CallInbound, CallUnknown	
		Objects=Agent, Place, GroupAgents, GroupPlaces	
		Subject=AgentStatus	
		MediaType=voice	
510	Informiam.Total_Outbound_Status_Voice_Time[1]	Category=TotalTime	None
		MainMask=CallOutbound	
		Objects=Agent, Place, GroupAgents, GroupPlaces	
		Subject=AgentStatus	
		MediaType=voice	

Table 13: Stat Server Metrics (Continued)

Metric ID	Stat Server Metric Name	Definition	Conversion Type
511	Informiam.Total_Consult_Status_Time[1]	Category=TotalTime	None
		MainMask=CallConsult	
		Objects=Agent, Place, GroupAgents, GroupPlaces	
		Subject=AgentStatus	
512	Informiam.Total_Internal_Status_Voice_Time[1]	Category=TotalTime	None
		MainMask=CallInternal	
		Objects=Agent, Place, GroupAgents, GroupPlaces	
		Subject=AgentStatus	
		MediaType=voice	
28	Informiam.Total_Talk_Time	Category=TotalTime	None
		MainMask=CallInbound, CallUnknown, CallConsult, CallInternal	
		Objects=Agent, Place, GroupAgents, GroupPlaces	
		Subject=DNAction	
		MediaType=voice	

Table 13: Stat Server Metrics (Continued)

Metric ID	Stat Server Metric Name	Definition	Conversion Type
29	Informiam.Total_Time_To_ Answer	Category=TotalTime	None
		Description=Total time to answer	
		MainMask=CallAnswered	
		Objects=GroupQueues,Queue,RoutePoint	
		Subject=DNAction	
30	Informiam.Total_Time_To_ Answer_Agents	Category=TotalTime	None
		MainMask=OrigDNCallWait	
		Objects= GroupAgents, GroupPlaces	
		Subject=DNAction	
31	Informiam.Total_Time_Waiting_ Calls	Category=CurrentTime	None
		Description=Total time for calls waiting in queue	
		MainMask=CallWait	
		Objects=GroupQueues, Queue, RoutePoint	
		Subject=DNAction	

Table 13: Stat Server Metrics (Continued)

Metric ID	Stat Server Metric Name	Definition	Conversion Type
32	Informiam.Utilization	Category=RelativeTime	None
		MainMask=CallInbound, CallOutbound, AfterCallWork	
		Objects=Agent, Place, GroupAgents, GroupPlaces	
		RelMask=*, ~NotReadyForNextCall, ~LoggedOut	
		Subject=AgentStatus	
80	Informiam.Total_LoggedIn_Time	Category=TotalTime	None
		MainMask=*, ~LoggedOut, ~NotMonitored	
		Objects=GroupAgents, GroupPlaces	
		Subject=AgentStatus	
306	Informiam.Total_LoggedIn_ Voice_Time	Category=TotalTime	None
		MainMask=*, ~LoggedOut, ~NotMonitored	
		Objects=GroupAgents, GroupPlaces	
		Subject=AgentStatus	
		MediaType=voice	

Table 13: Stat Server Metrics (Continued)

Metric ID	Stat Server Metric Name	Definition	Conversion Type
504	Informiam.Total_Ready_Status_Time[1]	Category=TotalTime	None
		MainMask=WaitForNextCall	
		Objects=Agent, Place, GroupAgents, GroupPlaces	
		Subject=AgentStatus	
81	Informiam.Total_NotReady_Time	Category=TotalTime	None
		MainMask=NotReadyForNextCall	
		Objects=GroupAgents, GroupPlaces	
		Subject=AgentStatus	
89	Informiam.TotalTalkAndHoldTime	Category=TotalTime	None
		MainMask=CallInbound, CallConsult, CallUnknown, CallInternal	
		Objects=Agent, GroupAgents, Place, GroupPlaces	
		Subject=DNAction	
		MediaType=voice	

Table 13: Stat Server Metrics (Continued)

Metric ID	Stat Server Metric Name	Definition	Conversion Type
	Informiam.TotalTime InteractionsHandled	Category=TotalTime	
		MainMask=CallInbound, CallInternal, Call Consult, CallUnknown, CallOnHold	
		Objects=Agent, GroupAgents	
		Subject=AgentStatus	
82	Informiam.Queue_Calls_Handled	Category=TotalNumber	None
		MainMask=CallReleased	
		Objects=Queue, GroupQueues, RoutePoint	
		Subject=DNAction	
83	Informiam.Queue_Talk_Time	Category=TotalTime	None
		MainMask=CallReleased	
		Objects=Queue, GroupQueues, RoutePoint	
		Subject=DNAction	
84	Informiam.Queue_Handle_Time	Category=TotalTime	None
		MainMask=CallReleased, ACWCompleted	
		Objects=Queue, GroupQueues, RoutePoint	
		Subject=DNAction	

Table 13: Stat Server Metrics (Continued)

Metric ID	Stat Server Metric Name	Definition	Conversion Type
85	Informiam.Queue_After_Call_ Work_Time	Category=TotalTime	None
		MainMask= ACWCompleted	
		Objects=Queue, GroupQueues, RoutePoint	
		Subject=DNAction	
86	Informiam.CurrentAgent MembersLoggedIn	Category=CurrentState	addAgentsToGroup
		MainMask=LoggedIn	
		Objects=GroupAgents	
		Subject=DNAction	
308	Informiam.CurrAgents _LoggedIn_Voice	Category=CurrentNumber	None
		MainMask=LoggedIn	
		Objects=Agent, GroupAgents	
		Subject=DNAction	
		MediaType=voice	
87	Informiam.Queue_Outbound_ Calls	Category=TotalNumber	None
		MainMask=CallEnteredOutbound	
		Objects=Queue, GroupQueues, RoutePoint	
		Subject= DNAction	

Table 13: Stat Server Metrics (Continued)

Metric ID	Stat Server Metric Name	Definition	Conversion Type
88	Informiam.Queue_Expected_ Wait_Time	Category=ExpectedWaitTime	None
		MainMask=CallWait	
		Objects=GroupQueues, Queue, RoutePoint	
		RelMask=CallDistributed, CallAbandoned	
		Subject=DNAction	

[1] Added in Release 8.1.4.

Appendix

C Working With Monitoring Hierarchies

This appendix describes how to define a monitoring hierarchy, gives a worked example and describes how to use hierarchies for coaching. It contains the following sections:

Hierarchies in Genesys Configuration Server

Monitoring hierarchies are maintained in the Genesys Configuration Server and uploaded to the Frontline Advisor application on startup, or whenever the `Hierarchy Reload` button on the `Settings` tab is used.

Hierarchies are imported directly from a third-party system or HR system for new Genesys customers by Genesys Professional Services consultants as part of an initial deployment, then maintained thereafter in the Genesys environment.

Frontline Advisor reads the hierarchy from the Genesys Configuration Server. Customers can configure which location/folder in the Configuration Server houses the hierarchy, and 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 with a virtual enterprise node linking all the various hierarchies together. The hierarchy in the Configuration Server consists of a tree of folders

with the terminating nodes being *groups*, which in turn have *agents* as members.

These terms replace *supervisors*, *teams* and *agents* in previous versions.

Note: Frontline Advisor automatically loads the hierarchy from the Genesys Configuration Server at startup and daily at 02:55 am.

During the deployment of the Frontline Advisor module, you are prompted for:

- The tenant name on the Configuration Server where the FA hierarchy resides.
- The path to the hierarchy root folder on the Configuration Server. This value corresponds to the top-level node in your monitoring hierarchy.

Note: It is possible to have multiple root nodes in the hierarchy, which can come from different tenants.

The root level node(s) are no longer automatically called `Enterprise`. Users can call them anything that is permitted in the Configuration Manager.

Cisco Impact

For a pure Cisco environment, the hierarchy should be configured in the Configuration Server as it is done for a Genesys or mixed environment.

However, Cisco Adapter requires FA to send the Cisco `AgentSkillID` property to identify the agent while registering and issuing statistics. To accommodate this, the `AgentSkillID` must be added as an `Annex` property in the `Advisors` section of each agent in the hierarchy.

The `ExternalId.CISCO` attribute must be set in the agent/person's `Annex` tab under the `Advisors` section, and the value of the `ExternalId.CISCO` will be the `AgentSkillID` for the agent in the Cisco environment.

The hierarchy extractor will first try to extract the skill ID from the `Annex` section for a Cisco configuration. If the `ExternalID` property is undefined in the `Annex` section then it will extract the `EmployeeID` for the Genesys configuration.

Defining a Monitoring Hierarchy

The sample monitoring hierarchy is used here to explain how to define 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 20.

The sample monitoring hierarchy (Figure 18 on page 83) displays both the groups and monitors in one graphic.

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

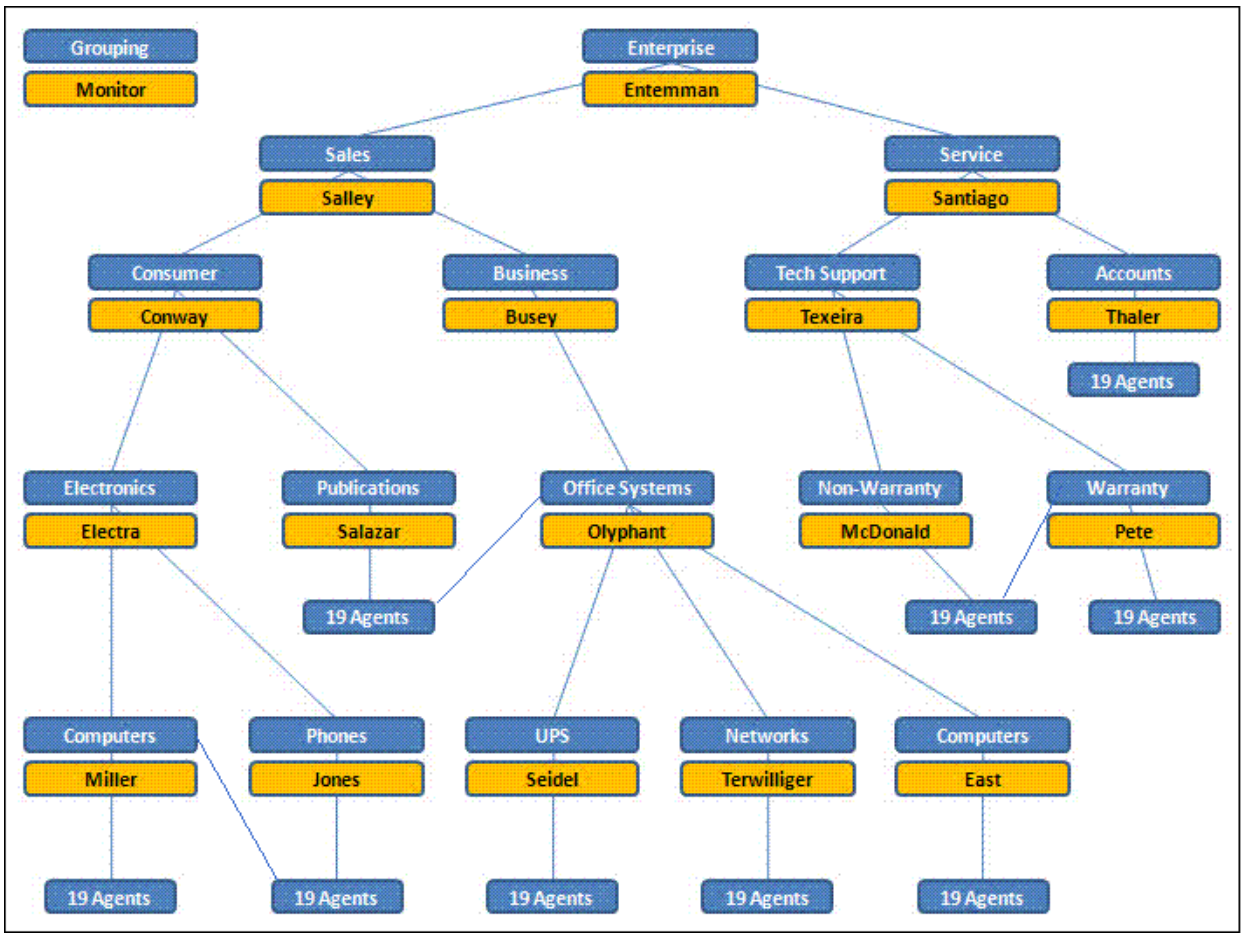

Figure 18: Sample Monitoring Hierarchy—Groups/Monitors

We use this graphic to explain how to define the hierarchy database for the sample monitoring hierarchy.

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 they do not share the same parent.

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 18 on page 83, 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 Genesys Configuration Manager’s database.

Sample Monitoring Hierarchy

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

- Groupings, page 85
- Monitors, page 85

The sample monitoring hierarchy has nine groups of nineteen agents in a five-level hierarchy (Figure 19).

Groupings

Figure 19 shows a hierarchy of groupings.

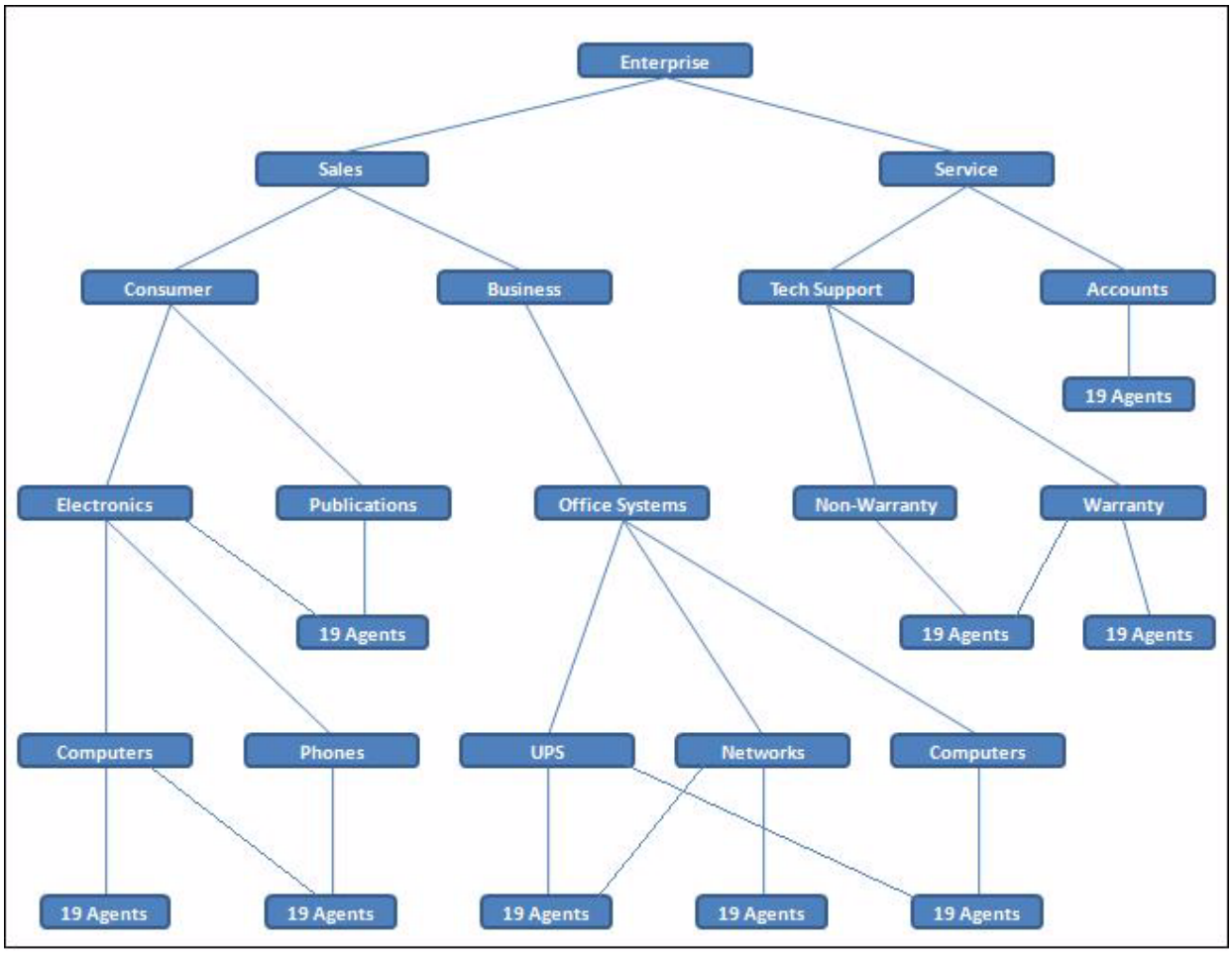

Figure 19: Sample Monitoring Hierarchy

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 20 on page 86 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.

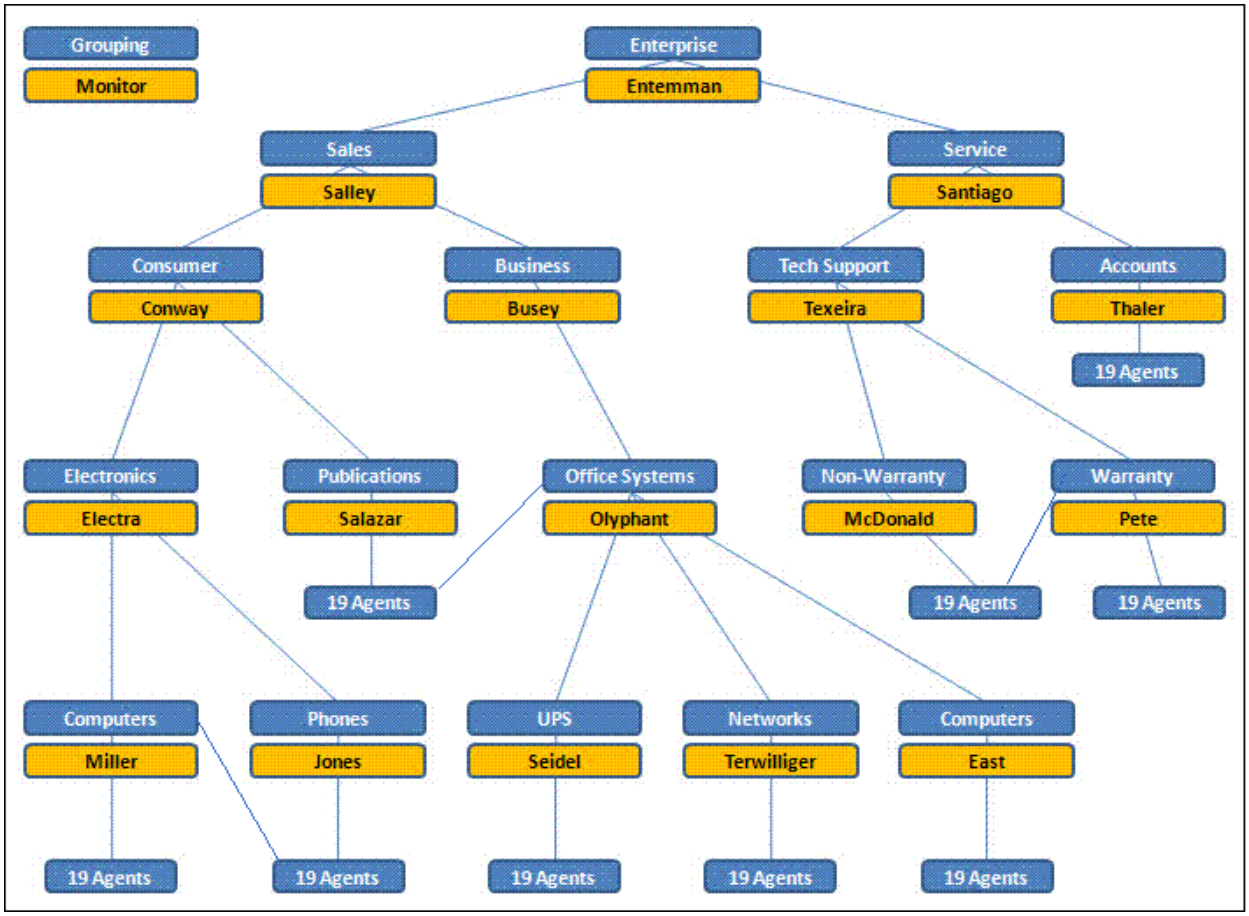

Figure 20: Monitoring Hierarchy

Sample Hierarchy

A sample monitoring hierarchy has nine groups of nineteen agents in a five-level hierarchy (Figure 19 on page 85). The sample monitoring hierarchy will be used to further explain the concepts of:

- Inheritance
- Enable/Disable

This section provides an overview of these concepts.

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 88).

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 C, “Working With Monitoring Hierarchies,” on page 81.

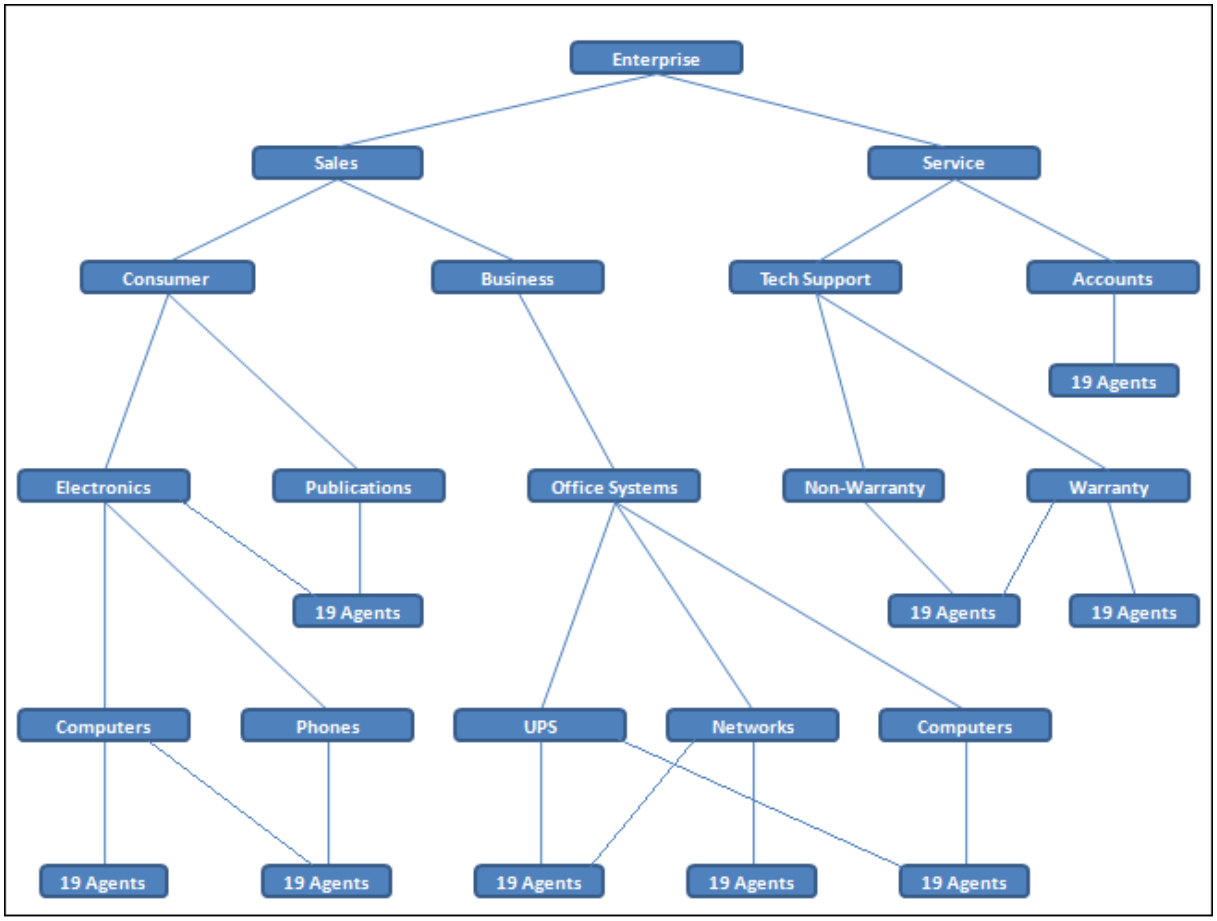

Figure 21: Sample Monitoring Hierarchy

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).

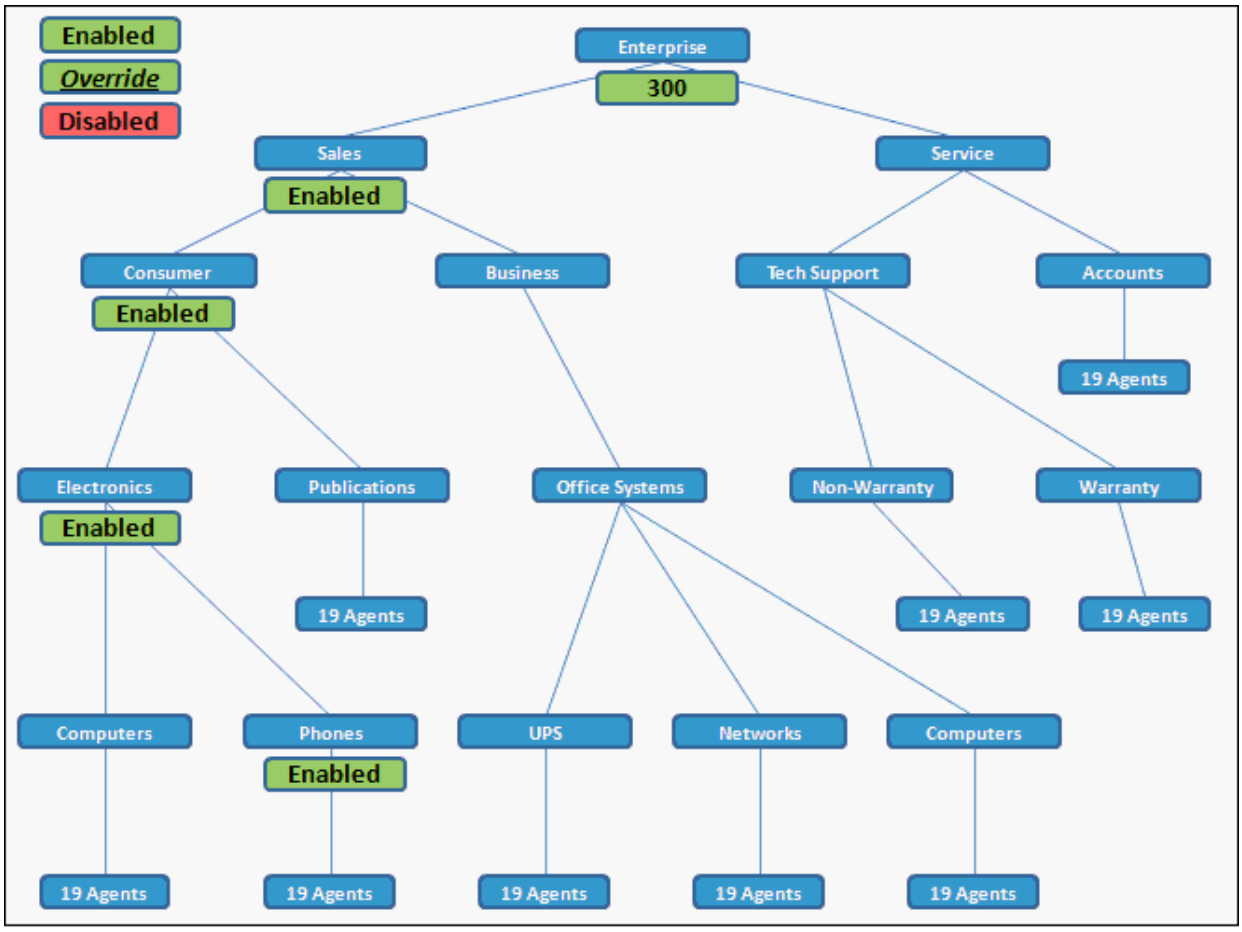

Figure 22: Phones Node

Monitors

Role-based access control defines which people can monitor which groups in Frontline Advisor. Figure 23 on page 89 displays both the monitoring information and the grouping 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, with one person (monitor) for each node in the tree.

A manager has monitoring access to all groups for which they have *read* access, as configured by administrators in the Genesys Configuration Manager. A monitor (person) that can monitor a node can only monitor any child nodes if this permission is specifically granted to them on a per-node basis.

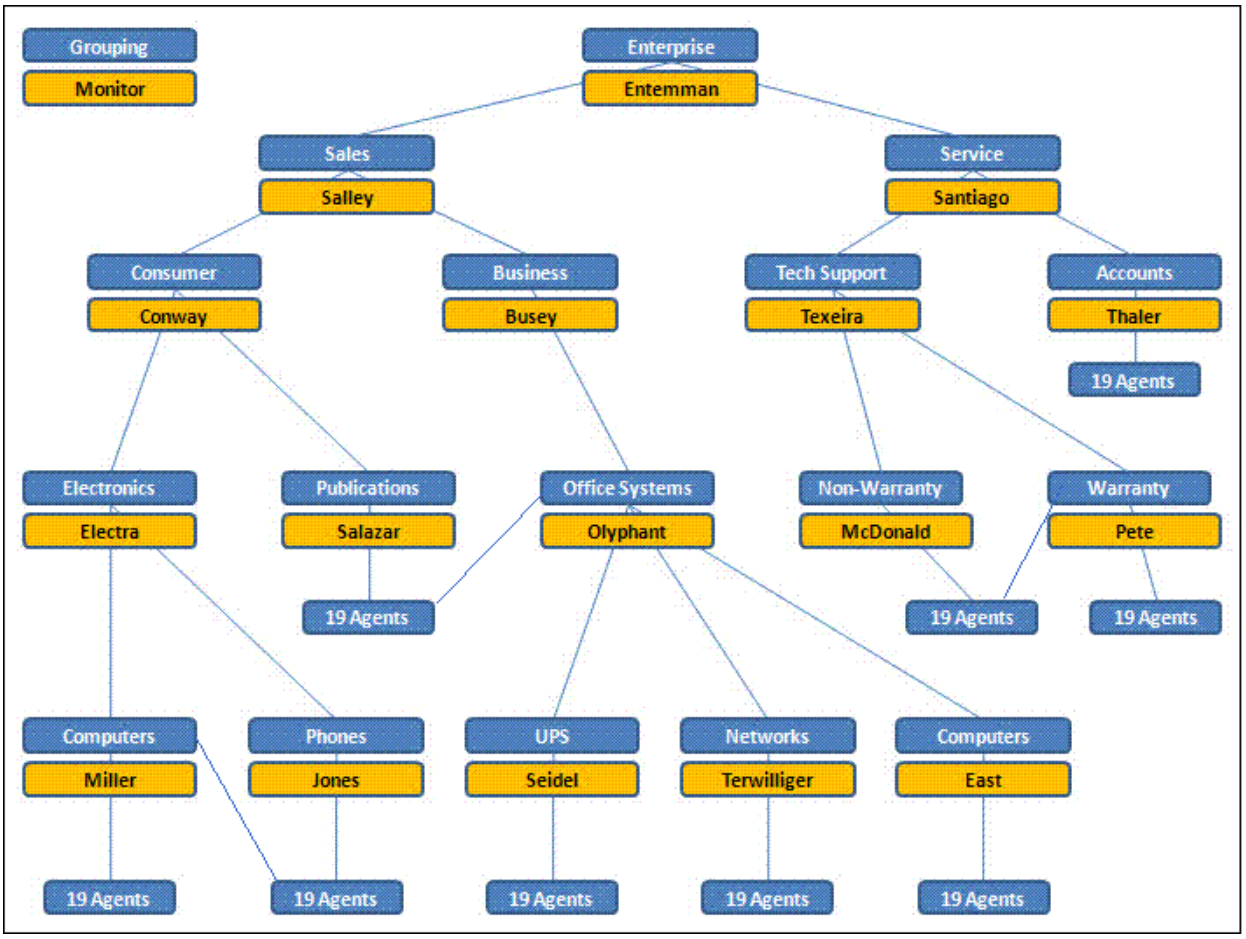

Figure 23: One Monitor per Group in the Monitoring Hierarchy

Viewing Rules - Example

The example below illustrates the default settings for rules at the top node (`Enterprise` in our monitoring hierarchy) (Figure 24 on page 90).

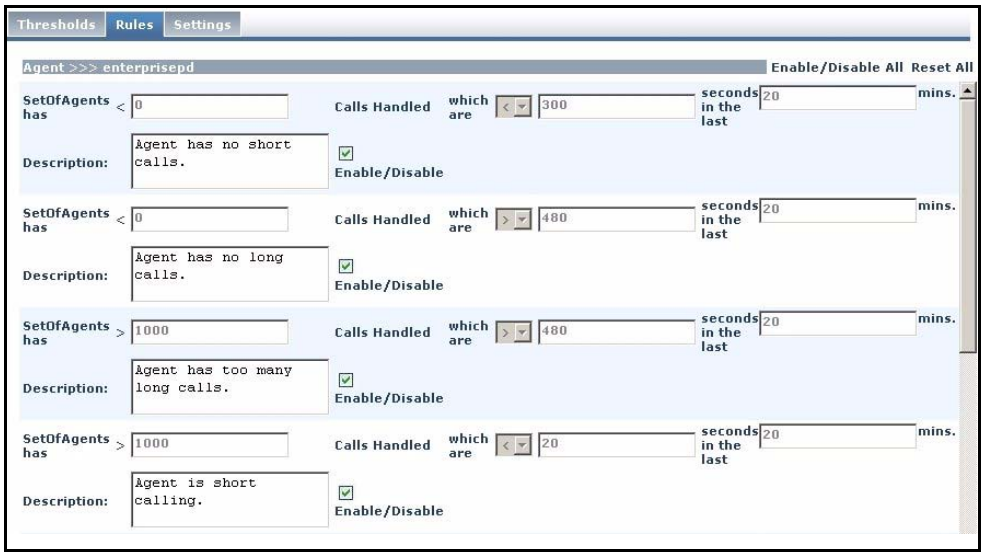

Figure 24: Default Calls Handled, 300

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 24).

Defining Rules - 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 25 because it is scrolled out of view).

Then enter the override value and click the `Save` button. Figure 25 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.

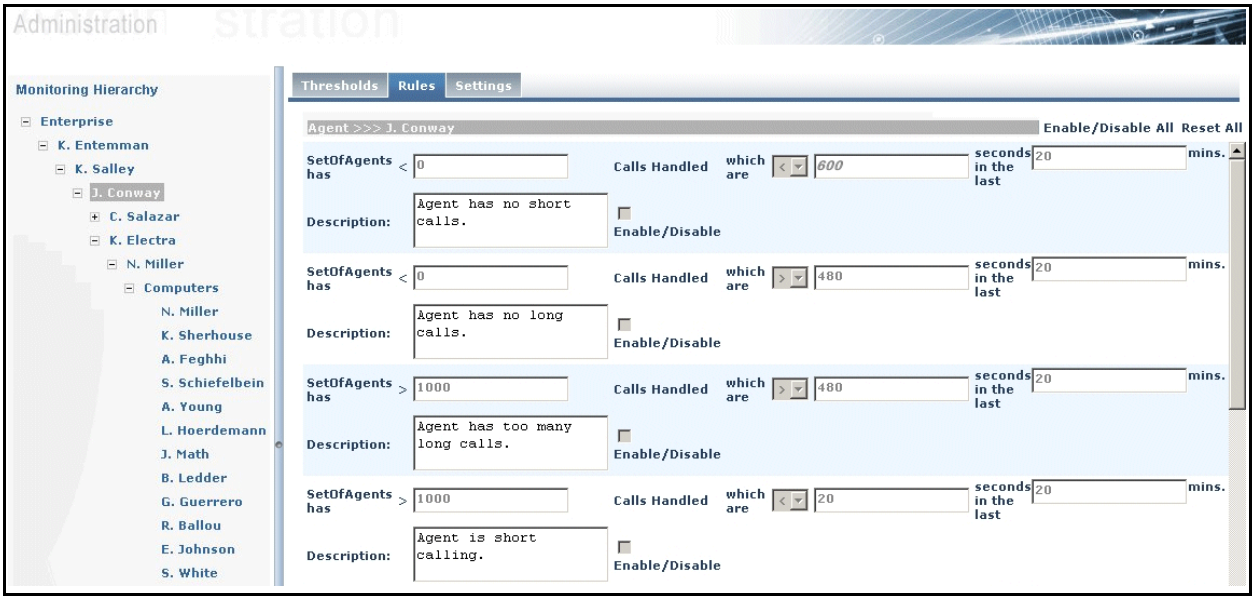

Figure 25: Override Calls Handled, 600

Defining Thresholds - Example

Suppose, in Figure 26 on page 91, 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 12 on page 32). Type a value of `600` for Critical High AHT (Figure 26 on page 91). 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 26 on page 91). 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.

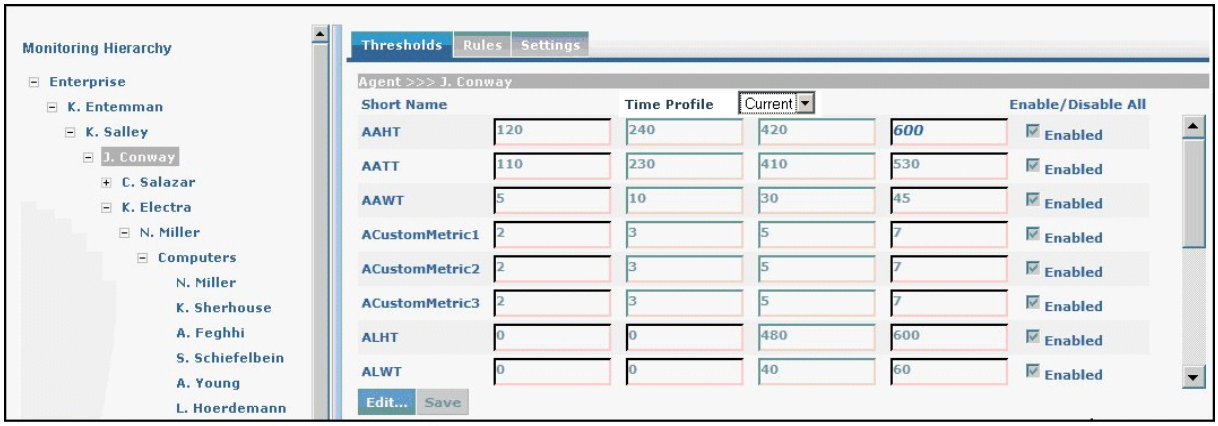

Figure 26: Override Critical High AHT, 600

Note: Because an agent can 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.

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.

Supplements

Related Documentation Resources

The following resources provide additional information that is relevant to this software. Consult these additional resources as necessary.

Performance Management Advisors

- *Performance Management Advisors 8.1 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, 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, provides documented migration strategies for Genesys product releases. Contact Genesys Technical Support for more information.

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 the following additional resources as necessary:

- *Genesys Hardware Sizing Guide,* which provides information about Genesys hardware sizing guidelines for the Genesys 8.x 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 that are relevant to the Genesys licensing system.
- *Genesys Database Sizing Estimator 8.x Worksheets,* which provides a range of expected database sizes for various Genesys products.

For additional system-wide planning tools and information, see the release-specific listings of System Level Documents on the Genesys Technical Support website. These documents are 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 wiki at `http://docs.genesyslab.com/`.
- Genesys Documentation Library DVD and/or the Developer Documentation CD, 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 14 describes and illustrates the type conventions that are used in this document.

Table 14: 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 98).	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. . .
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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