



Reporting Technical Reference

7.6 Overview

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Preface

Welcome to the *Reporting Technical Reference 7.6 Overview*. This document is the first book in the *Reporting Technical Reference* series. This document introduces you to the concepts, terminology, and procedures relevant to reporting within a Genesys environment.

This guide is valid only for the Reporting 7.6 release(s).

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:

- [The Reporting Technical Reference Series, page 5](#)
- [Intended Audience, page 6](#)
- [Chapter Summaries, page 6](#)
- [Making Comments on This Document, page 6](#)
- [Contacting Genesys Technical Support, page 7](#)
- [Document Change History, page 7](#)
- [New In This Release, page 7](#)

For information about related resources and about the conventions that are used in this document, see the supplementary material starting on [page 136](#).

The Reporting Technical Reference Series

This *Overview* is the first of four books in the *Reporting Technical Reference* series. The other books are:

- *Reporting Technical Reference 7.6 Solution Reporting Templates*
- *Reporting Technical Reference 7.6 Customization*
- *Reporting Technical Reference 7.6 Data Mart Conceptual Data Model*

This book provides an in-depth discussion of the Genesys Call Model, the Genesys Multimedia Interaction Model, and the Genesys Statistical Model. While *Overview* is mostly theoretical, the other books of the series show

practical applications describing how to run and customize the Genesys-provided reports, their definition, and descriptions of the tables and columns from which the reports are sourced.

Chapter Summaries

In addition to this preface, this guide contains the following chapters and one appendix:

- Chapter 1, “Overview of Genesys Reporting,” on [page 9](#), contains an overview of Genesys Reporting and explains key concepts.
- Chapter 2, “Sources of Solution Reporting Data,” on [page 27](#), provides an in-depth discussion of the sources of data for Genesys Reporting and explains the Genesys Call Model, the Genesys Multimedia Interaction Model, and the Genesys Statistical Model.
- Chapter 3, “Historical Reporting,” on [page 101](#), discusses Genesys historical reporting in detail, including descriptions of the various components and their relationships.
- The appendix, “Acronym List” on [page 131](#), defines the acronyms used in this guide.

For information about related resources and about the conventions that are used in this document, see the supplementary material starting on [page 133](#).

Intended Audience

This document is primarily intended for [list primary and secondary audience for this document]. 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

You should also be familiar with database technology.

Making Comments on This Document

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Document Change History

This section lists topics that are new or that have changed significantly since the first release of this document.

- All references to Hyperion Reports have been updated with SAP Crystal Reports.
- The section, “Crystal Reports–CC Analyzer Report Generation” on [page 119](#), has been updated based on the functionality of SAP Crystal Reports.
- A new subsection, “Report Distribution” on [page 119](#), has been added.

New In This Release

This section lists topics that are new or that have changed significantly since the 7.2 release of this document.

- For your reference, the previous edition of this document is the *Reporting Technical Reference Guide for the Genesys 7.2 Release*. All of the books listed on [page 5](#) comprised this single volume.
- All Genesys-provided templates have been updated to function with SAP Crystal Reports.



Chapter

1

Overview of Genesys Reporting

This chapter briefly describes the Genesys software environment and how the Reporting products fit into that structure. This chapter includes these sections:

- [The Genesys CIM Platform, page 9](#)
- [Reporting in a Typical Contact Center, page 15](#)
- [Solution Reporting Classifications, page 17](#)
- [Metrics and Statistics for Solution Reporting, page 18](#)
- [Report Layout and Layout Template, page 19](#)
- [Genesys Reporting Layer Products, page 20](#)

The detailed discussion of Reporting structure and functionality is presented in subsequent chapters.

The Genesys CIM Platform

Genesys Solution Reporting is a part of the Genesys Customer Interaction Management (CIM) Platform. The CIM Platform consists of:

- Management Framework
- Solution Reporting (CC Analyzer, CCPulse+)
- Universal Routing
- Genesys Multimedia (formerly Multi-Channel Routing [MCR]) (optional)

Note: Genesys Multimedia is a group of components that are required if Universal Routing, Solution Reporting, and Management Framework are to handle interactions in any medium other than traditional telephony.

You must add at least one Media Channel—such as Inbound Voice, E-mail, or Chat (Web Media)—to the CIM Platform. [Figure 1](#) shows an overview of the CIM Platform architecture and indicates where Genesys Solution Reporting fits within it.

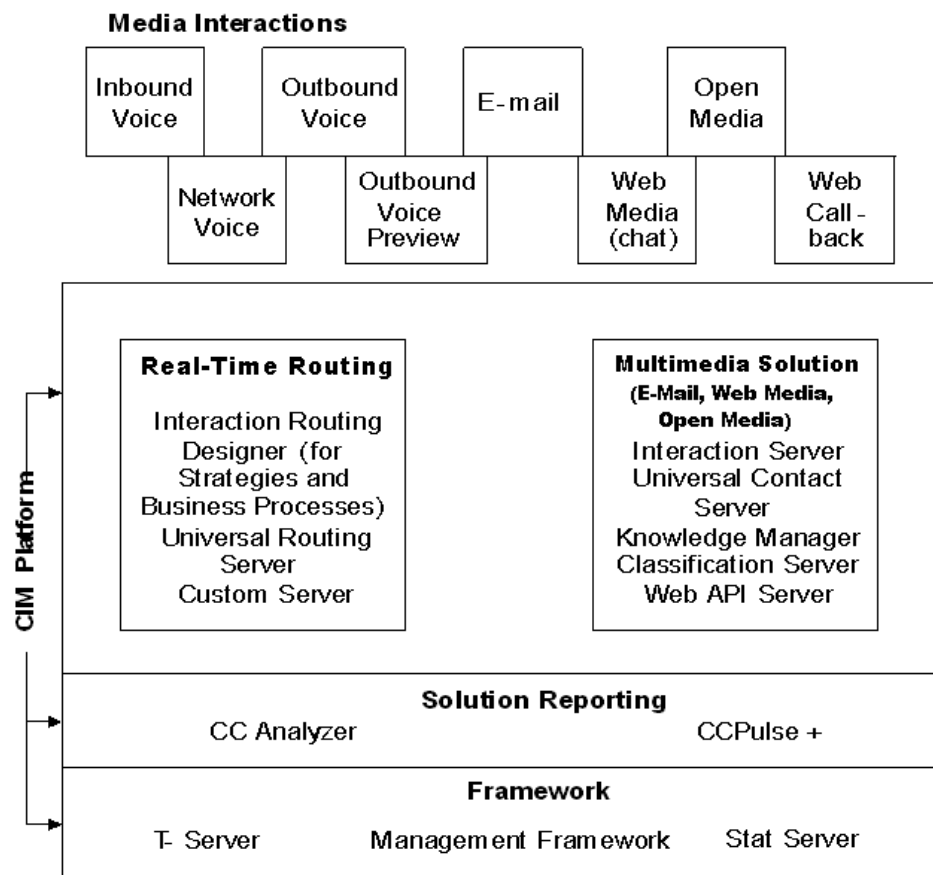


Figure 1: The Genesys CIM Platform

[Figure 2](#) shows a more detailed view of a typical contact center environment, including the components from which Genesys Solution Reporting draws its data.

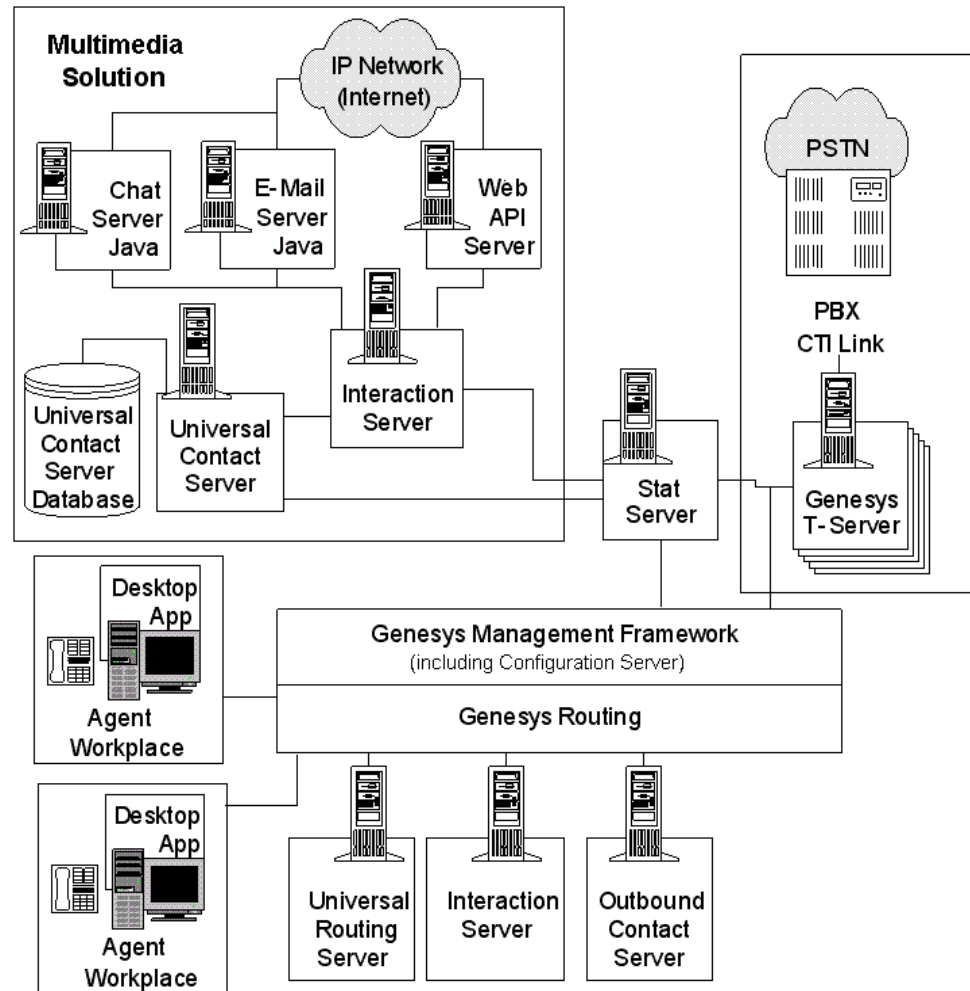


Figure 2: Genesys-Based Contact Center Environment

Now consider the major elements of the Genesys Solution Reporting environment in more detail.

T-Server/ SIP Server

The Genesys Telephony Server (T-Server) connects the switching telephony network and the contact center computing environment. In terms of computer telephony, T-Server is a CTI Server connecting the switching and computing domains. T-Server is connected with the PBX through a CTI link operating in correspondence with a stack of protocols. Through this link, T-Server monitors and controls processes within the switching domain. For example, if the PBX receives an incoming call and the corresponding telephone set starts ringing, T-Server receives a CTI protocol packet informing it about this operation. On the other end, T-Server is connected to Genesys contact center applications via T-Lib APIs to supply call-monitoring and DN-control functionality.

Note: References to T-Server and voice interactions throughout this document and series also apply to SIP Server and instant-message interactions.

**Interaction Server,
Universal Contact
Server, and Web
API Server**

Contact centers that use Genesys Multimedia use Universal Contact Server (UCS) and Interaction Server to provide support for their multimedia interactions (for example, e-mail, chat), along with T-Server for telephony interactions. Interaction Server produces events for Internet-based interactions, enabling Genesys components and products, such as Solution Reporting, to use data on multimedia interactions.

The Universal Contact Server writes information about multimedia interactions to the Universal Contact Server database. Universal Contact Server stores interaction contents, such as e-mail contents and chat transcripts, as well as other information that identifies the interaction and how it has been processed.

Genesys Multimedia also uses the Web API Server, which enables customers to send e-mail using a web form. The Web API Server provides web callback functionality, enabling users to schedule callbacks from a company website.

Note: This release of the *Reporting Technical Reference* series does not discuss the Internet Contact Solution (ICS), an early predecessor to Genesys Multimedia. If you are using ICS, refer to the *Reporting Technical Reference Guide for the 6.5 Genesys Release*.

**Configuration
Server**

The Genesys Configuration Server maintains and manages the contact center configuration data. For instance, it stores configuration data about all database objects of a contact center—agents, places, devices, tenants, and so on.

If you are using Open Media statistics, use Genesys Configuration Manager to configure the media type and the stat types for interactions processed by Interaction Server. Configuration Manager stores the stat types in Configuration Server.

You also use Configuration Manager or Genesys Administrator, rather than Data Modeling Assistant (DMA), to create real-time stat types. DMA is specifically designed to handle historical stat types. Refer to “Managing Statistical Parameters” in the *Customization* book of the *Reporting Technical Reference* series for a detailed explanation.

Stat Server

The Genesys Stat Server presents statistical data about contact center interactions and objects. This data is used by various Genesys applications. For instance, the Universal Routing Server uses information from Stat Server about the status of agents to determine agent availability. The Solution Reporting tools use Stat Server data to generate statistical indicators of contact center performance and status, such as average handle time for customer calls, the number of calls in a queue, and so on.

Certain multimedia reports require that you enable the Stat Server Java Extensions (SSJE) because the data for these reports is sourced through the SSJE. This added flexibility in Stat Server architecture, available in version 7.0.2 and higher, enables you to dynamically extend Stat Server functionality with new statistical types and have Stat Server supply them to Genesys applications.

The *Framework Stat Server Deployment Guide* describes how to enable Java functionality in your Stat Server applications.

Note: Metrics derived from the SSJE are calculated only for those Interaction Server, Java instances that have the associated Stat Server included in their list of connections. The *Reporting Technical Reference 7.6 Solution Reporting Templates* indicates which metrics are derived from SSJE.

Agent Desktop Applications

Contact center agents use desktop applications in processing customer interactions. For instance, desktop applications present information about customers and incoming interactions, provide agents with options (such as transfer and conference) for handling interactions, and enable agents to attach data to interactions.

Genesys Products

Components of the Genesys platform that perform a particular function and depend on a dedicated server are called *products*. Genesys Solution Reporting provides pre-made (canned) layout templates for these products.

Universal Routing

Universal Routing, which includes Enterprise Routing and Network Routing, is based on the Universal Routing Server (URS), which is configured to process interactions and route them to a target. To do this, URS executes routing strategies, which are loaded on Routing Points. Routing strategies reflect each contact center's business logic. Based on routing strategy configuration, URS can route interactions based on agent skills or skill levels, information retrieved from a database, service levels, the value of a statistic, priority tuning, or other criteria. When executing a routing strategy, URS determines the most appropriate agent or target for the interaction, and routes the interaction accordingly.

Outbound Contact

Genesys Outbound Contact (based on the Outbound Contact Server, as shown in Figure 2 on [page 11](#)) generates outbound calls to customers on contact-center calling lists. For instance, you can configure the software to run

predictive dialing campaigns, during which it calls customers and connects the calls to agents if the customer answers the phone.

Multimedia

Genesys Multimedia tracks and processes multimedia interactions, such as e-mail and web-based chat, and Multimedia components also work with T-Server to process voice interactions. It enables coordinated handling of all interaction types you might be using. The Universal Contact Server identifies interaction threads and stores interaction history in the Universal Contact Server database. The database also stores information such as customer account and phone numbers and supplies the content for standard responses and screening rules.

Genesys Multimedia provides business process handling of multimedia interactions through Interaction Server, which receives and caches data about interactions, works with Universal Routing and its interaction workflow function to queue interactions and direct them to the appropriate targets, based on business processes and routing strategies.

Note: Universal Routing 7.2⁺ is designed to work with Genesys Multimedia. For documentation specific to the relevant release, refer to the *Multimedia* documentation set.

Genesys Multimedia includes e-mail and chat, SMS, and web co-browse interaction management. Using Genesys Open Media, you can route and report on any type of media. For example, you might want to track incoming faxes, route them, and report on how they are handled.

To use Genesys Open Media:

- Create custom media servers and custom media types using the software development kits (SDKs) provided by the Genesys Developer Program.
- Create routing strategies for your custom media types using Genesys Universal Routing.
- Report on custom media interaction processing by creating custom media statistics, used by both CCPulse+ and CC Analyzer.

The process for creating stat types for open media custom statistics differs in certain details from that for other stat types. However, after you have performed the initial configuration, data collection and reporting functions occur in essentially the same way as for other stat types.

Note: For a detailed explanation of how to create open media statistics, refer to the *Customization* book of the *Reporting Technical Reference* series.

Reporting in a Typical Contact Center

The processing of customer interactions within a contact center can be distributed over several CTI and Internet-based components. For example, a typical inbound call from a customer might first be connected to an IVR to collect information about the interaction and/or customer. Then the call might be directed to a Universal Routing Server, which finds the most appropriate agent to handle the call and routes the call accordingly. Each component involved in call processing can be interesting from the reporting perspective. [Figure 3](#) presents the general schema of Solution Reporting in a Genesys environment.

Note: Genesys offers several reporting applications that, taken together, form the Genesys Reporting Layer.

Reporting Layer Elements

The Reporting Layer includes three major product families:

- Solution Reporting, consisting of CC Analyzer and CCPulse+ and their common, historical, back-end components, which create object-centered historical and real-time reports based on Stat Server data.
- Interaction Concentrator (ICON), which collects and stores detailed data about interactions and resources in customer interaction networks that use Genesys Framework (contact center, enterprise-wide, or multi-enterprise telephony and computer networks). ICON serves as a staging area for Genesys Info Mart.
- Genesys Info Mart (GIM), which stores data about configuration, agent, interaction, and campaign details in a database. A series of star schemas, together with corresponding aggregate tables (available in Info Mart 7.2⁺) speeds the retrieval of the stored data. Querying the data helps you uncover trends, chart heavy usage times, and reveal patterns in your contact center.
- Genesys Interactive Insights (GI2), which accesses Genesys data stores like Genesys Info Mart to provide historical reporting and analysis of contact center activities with business context and related business results. It also allows easy drilling and ad hoc querying to support root cause analysis.

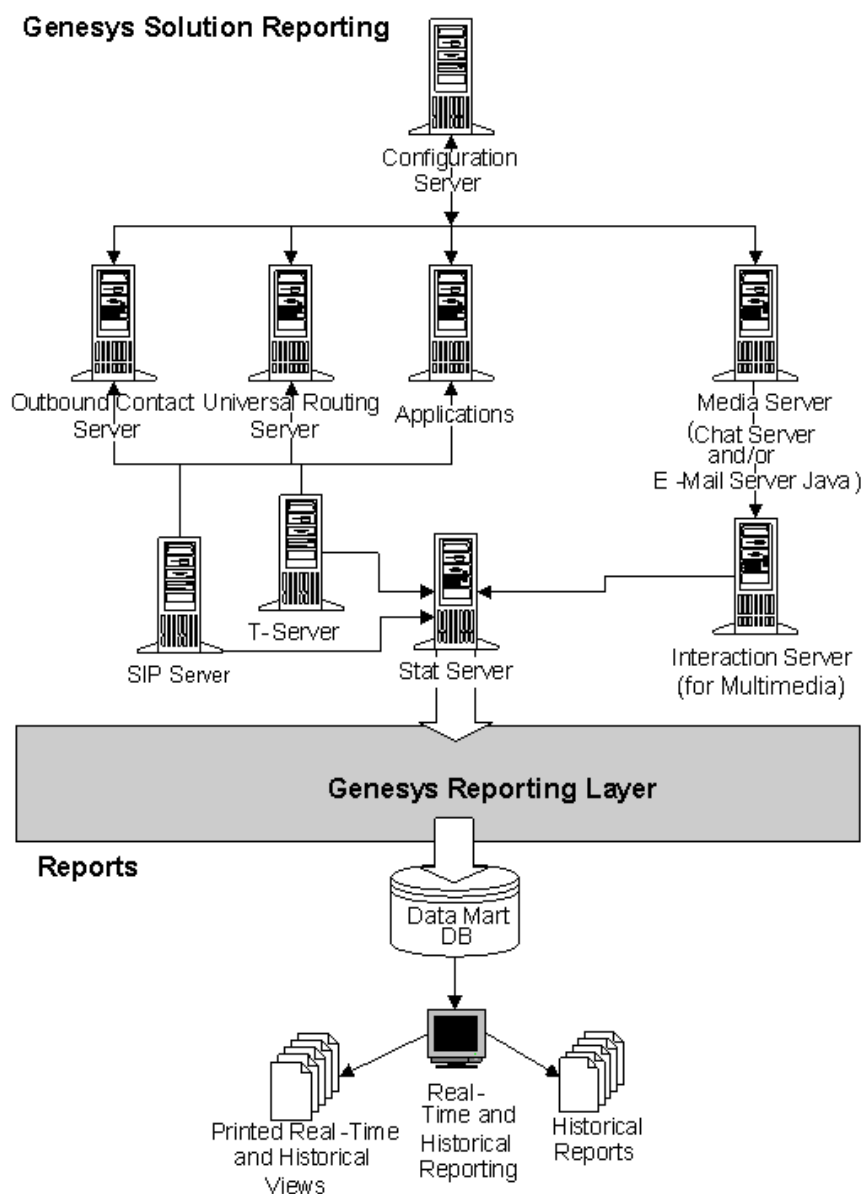


Figure 3: Genesys Solution Reporting

Note: This document focuses on Solution Reporting. For additional information:

- About ICON, refer to the Interaction Concentrator documentation set.
- About GIM, refer to the Genesys Info Mart documentation set.
- About GI2, refer to the Interactive Insights documentation set.

Solution Reporting consists of the following services:

- The Data Collection Services, which gather information about interactions and resources from Configuration Server and Stat Server.
- The Data Mart Services, which organize collected information into more usable forms, and aggregate metrics to months, quarters, and years.
- The Information Delivery Services, consisting of the CCPulse+ and CCAalyzer with SAP Crystal Reports applications.
 - Contact center managers use the information-delivery components of CC Analyzer, which are powered by SAP Crystal Reports, to construct and view reports that provide information about the performance of various contact center objects over time. Managers can filter these performance reports based on business rules.
 - Managers, supervisors, and administrators use CCPulse+ to create custom real-time and historical views of contact center objects, to facilitate the analysis of staffing, business, and contact-routing strategies.

Genesys Data Sources for Solution Reporting

To collect and report business data, Solution Reporting components communicate with other pieces of the Genesys platform. Solution Reporting collects Configuration Server data about contact center objects such as agents' places, groups of agents, telephony devices, and so forth.

Stat Server supplies Solution Reporting with statistical data about the processing of interactions and the performance of contact center objects. Stat Server collects and processes the information from T-Server and Configuration Server. If you are using Genesys Multimedia, Stat Server also draws data from Interaction Server.

Stat Server collects primary information about the progress of calls and other types of interactions from these servers, processes it, and presents it as aggregated values or more basic numeric or status information. Upon receiving interaction events from T-Server, SIP Server, or Interaction Server, Stat Server determines the actual states of objects affected by these events and recalculates corresponding aggregates or other numeric or status parameters of related objects.

Solution Reporting Classifications

Solution Reporting functionality in the Genesys products covers many aspects of contact center performance. It is useful to classify reporting from different perspectives.

- **By time:**

- Real-time Solution Reporting displays values of metrics in real time. For example, real-time Solution Reporting can present data such as the current number of calls in the contact center, average time of processing calls, current number of available agents, and so forth.
- Historical Solution Reporting maintains records of past contact center activity and reports against it. The total time an agent spent processing calls during the past month is one such metric.
- **By type of subject:**
 - Object-centric Solution Reporting focuses on the statistical values of contact center objects, such as an agent's call-handling time, number of calls in queue, and so on.
- **By owner of information:**
 - Systems Solution Reporting gathers and presents general information about system elements, for example, contact center objects such as agents, groups, and places.
 - Product-specific Solution Reporting collects and presents product-specific information, such as the number of records agents process during a specific outbound campaign.
 - Business Solution Reporting collects and presents business-specific information, such as the revenue that agents generate during conversations.

Metrics and Statistics for Solution Reporting

The term *metric* is widely used in different areas of computer science and everyday life. Regardless of its application, a *metric* defines:

- The kind of subject to be measured.
- The characteristics of the subject to be measured.
- How measuring is performed.

The results of those measurements in a specific instance are *statistics*.

An example is a checking account statement. The statement displays preset categories of information, such as account balance, deposits, withdrawals, and so on. The specific information that appears in each column depends on whether the information comes from your bank account or the bank account of your college-age child or your rich aunt. The categories (metrics) stay the same. The results when the categories are applied to a specific data source at a specific time (the statistics) change.

Metrics collected for contact centers must illuminate various performance aspects of the contact center, which management can then use to formulate additional strategies that improve performance. Solution Reporting provides

just this sort of information. They are also flexible enough that you can use them to create your own metrics to fill your own business-specific needs.

The interrelation between the major statistical concepts used in Genesys Solution Reporting is illustrated in [Figure 4](#).

The figure shows that a metric defines not only *what* should be measured, but also *where*, *how*, and *when* it should be measured. The *what* component is defined on the basic actions that characterize processes in the contact center. *Where* points to the objects of the contact center—which ones should be considered. *How* defines the manner of calculation—the algorithm (statistical category). *When* specifies time constraints of calculation. For instance, the time profile defines an interval from which statistics are to be calculated.

When metrics are applied to a specific contact center object, they produce a *statistic*. Data obtained from analyzing statistics are called *statistical values*.

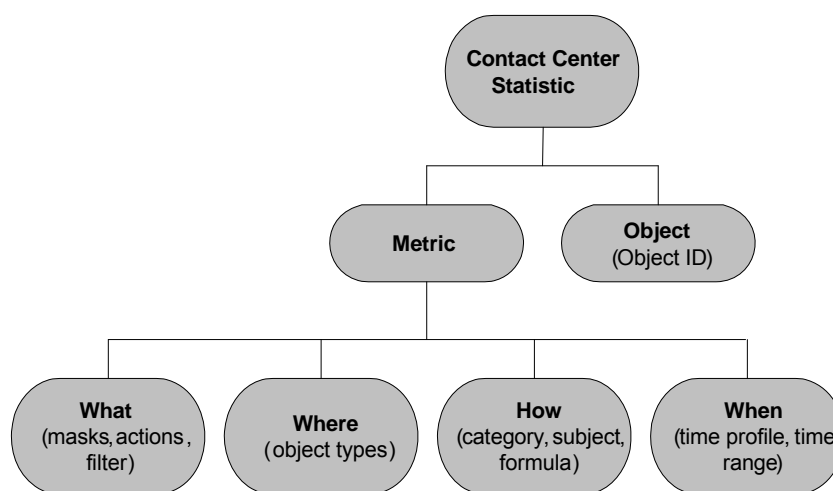


Figure 4: Statistics and Metrics for Solution Reporting

Report Layout and Layout Template

Layout templates and report layouts identify what information should be gathered about which objects and over which time period. It is important to understand how each one functions in the process of creating a report.

- *Report layouts* define which contact center objects and what data about those objects are of interest. Report layout content includes information about contact center objects, statistics for the objects, the time frames in which the statistics should be gathered, and so forth. A report layout is the application of a layout template to a specific data object(s).

- *Layout templates*, which are an abstract version of a report layout, simplify the process of report layout creation. Layout templates specify a set of defined metrics that are to be applied to a particular object type. They outline the content of a report layout but do not refer to any actual contact center object.

Note: All of the metrics in a layout template use the same time profile.

- *Reports* emerge from the use of a report layout to collect data on specific objects over a particular time. They present actual events, whereas report layouts and layout templates represent increasing levels of abstraction.

Note: The report layout defines only report content. Report layout appearance is controlled by the Information Delivery Services tool you use, such as CCPulse+ or CC Analyzer's SAP Crystal Reports.

The most convenient way to create a report layout is to use a layout template to define the content of the report layout. [Figure 5](#) shows the relationship between a report layout and a layout template.

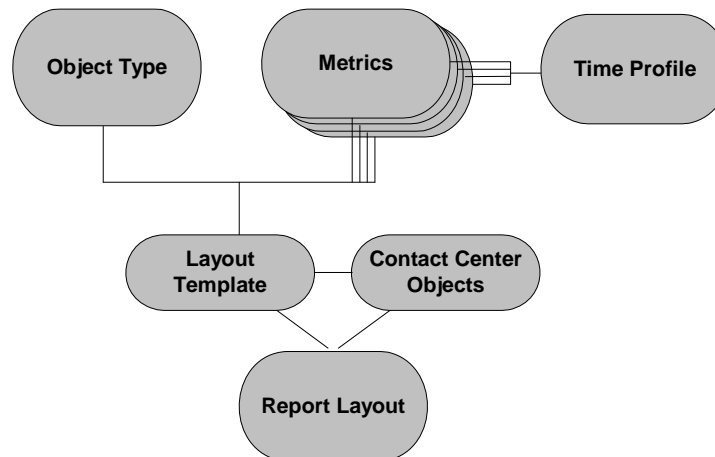


Figure 5: Relation of Report Layout to Layout Template

Genesys Reporting Layer Products

The Genesys Reporting Layer provides contact center administrators with real-time and historical views of the performance metrics of contact center objects

and how these metrics change over time. The Genesys Reporting Layer offers the following set of reporting tools:

- **CCPulse+**—a GUI application that enables users to monitor real-time and historical statistical values of contact center objects and application-specific objects. CCPulse+ can present information from both Data Mart and from Genesys Info Mart.
- **CC Analyzer**—an engine for Historical Reporting and analysis of the performance of contact center objects. CC Analyzer draws data from the Data Collection and Data Mart services, which also supply historical reporting data to CCPulse+.
- **Call Concentrator**—a collector of historical data about the interconnection of contact center objects, which is determined by processing a call's history. This historical data is stored in a relational database (the Call Concentrator database).
- **Interaction Concentrator**—a collector of detailed interaction data from customer interaction networks that use Genesys Framework (contact center, enterprise-wide, or multi-enterprise telephony and computer networks). This data is stored in a relational database (Interaction Database).
- **Genesys Info Mart**—an ETL engine that stores historical data about the entire contact center, based on configuration, agent, interaction and campaign details, in a relational database (the Info Mart database). Info Mart also supplies CCPulse+ with historical reporting data, which can be retrieved using query-based reports.

Figure 6 presents a general schema of the Genesys Reporting Layer. In addition to data shown in **Figure 6**, all server components receive contact center configuration data from the Configuration Layer. Certain products also store some configuration data. Most of the components in this figure have already been discussed; the following sections describe Genesys Solution Reporting products.

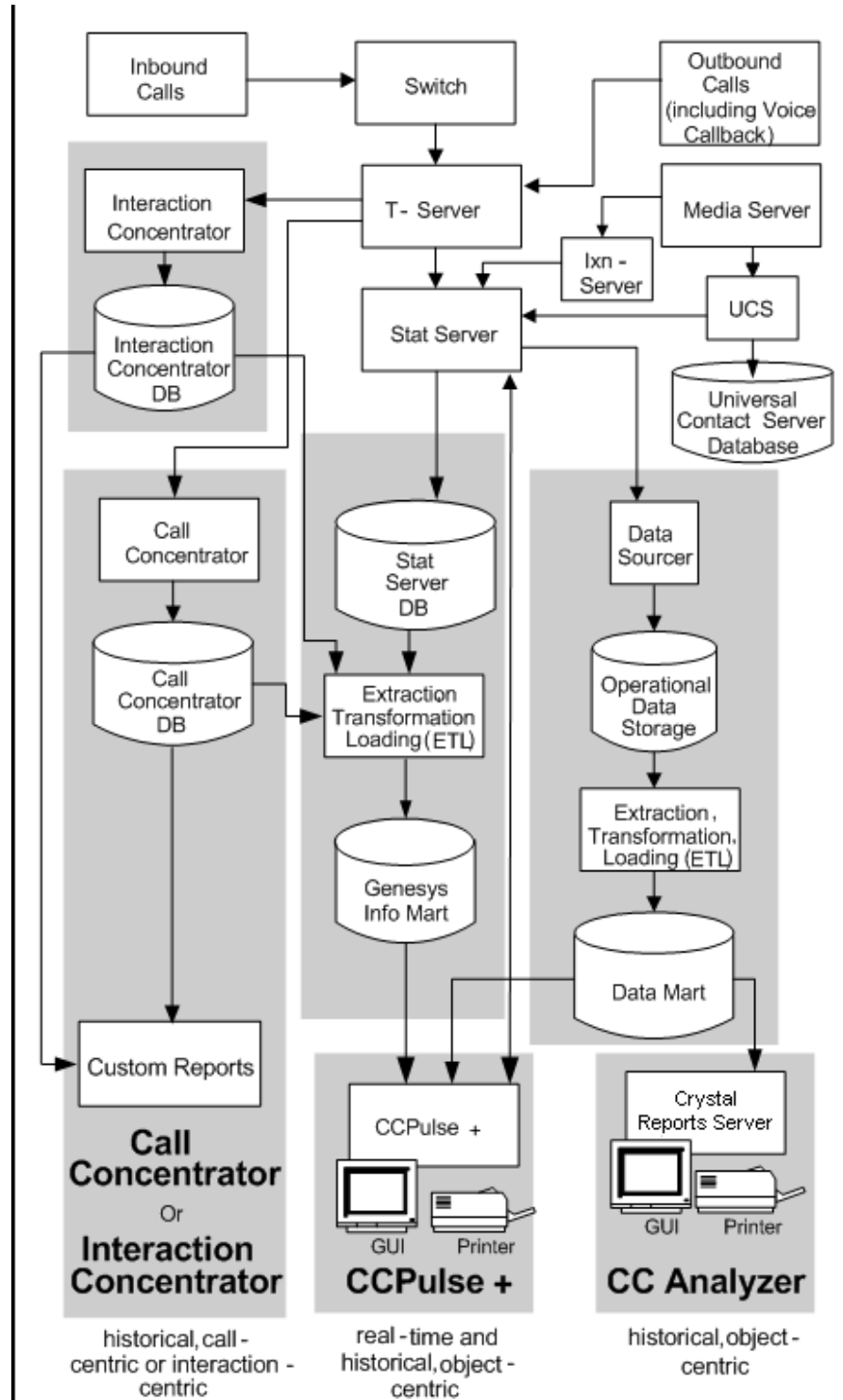


Figure 6: Reporting Information Flow through CCPulse+ and CC Analyzer

Data Collection and Processing

The Data Collection and Data Mart services provide Historical Reporting information to CCPulse+ and CC Analyzer, with SAP Crystal Reports for data-presentation functionality. You can customize these statistics-gathering and transforming functions. You can:

- Specify which statistics should be collected for which contact center objects and how often.
- Define new statistic types (stat types), complete with retrieval parameters such as time ranges and filters.
- Propagate the information collected into a database.
- Preaggregate information into hours, days, weeks, months, quarters, and years.

CCPulse+—Real-Time, Historical, and Query-Based Views

CCPulse+ is a desktop GUI application that displays real-time, historical, and query-based status and statistical data about agents, agent groups, places, queues, and more. CCPulse+ presents data from both CC Analyzer's Data Mart and Genesys Info Mart.

CCPulse+ is bundled with Genesys Universal Routing, Outbound Contact, and Multimedia products and supplies pre-made view report templates that best fit each product's focus of activity. It also supplies Genesys Info Mart templates for those customers who wish to view data from Genesys Info Mart.

CCPulse+ can display statistics for open media interactions for which you have created custom media types and statistical types.

CCPulse+ Features and Functions

- CCPulse+ monitors activity within the contact center across all media types. For example, a supervisor might monitor the number of chat sessions currently in the queue, the average handle time of e-mails, and so on.
- CCPulse+ monitors the operational behavior of a contact center, such as the number of agents logged in, the number on calls, and average call-handling time. By combining business data with operational data, a contact center manager can also obtain an up-to-the-second view of the contact center.
- CCPulse+ includes wizards that guide you in creating customized views of real-time and historical data. Genesys Multimedia, Outbound Contact, and Universal Routing also provide their own out-of-box views tailored to monitor the effectiveness of a various product functions; for example, the effectiveness of an outbound campaign or routing strategy.

- CCPulse+ enables you to easily customize the objects monitored, the presentation format (for example, graph type), the color coding, and so forth, to best fit your needs.
- CCPulse+ includes wizards that enable contact center managers and supervisors to define thresholds and associated actions, such as alarms, so that a supervisor can be notified when an agent reaches a certain revenue goal, for example, or when a queue is backlogged.

Figure 7 shows a snapshot of a view created within the CCPulse+ application. The left pane shows monitoring functionality. The right pane provides historical and real-time Solution Reporting.

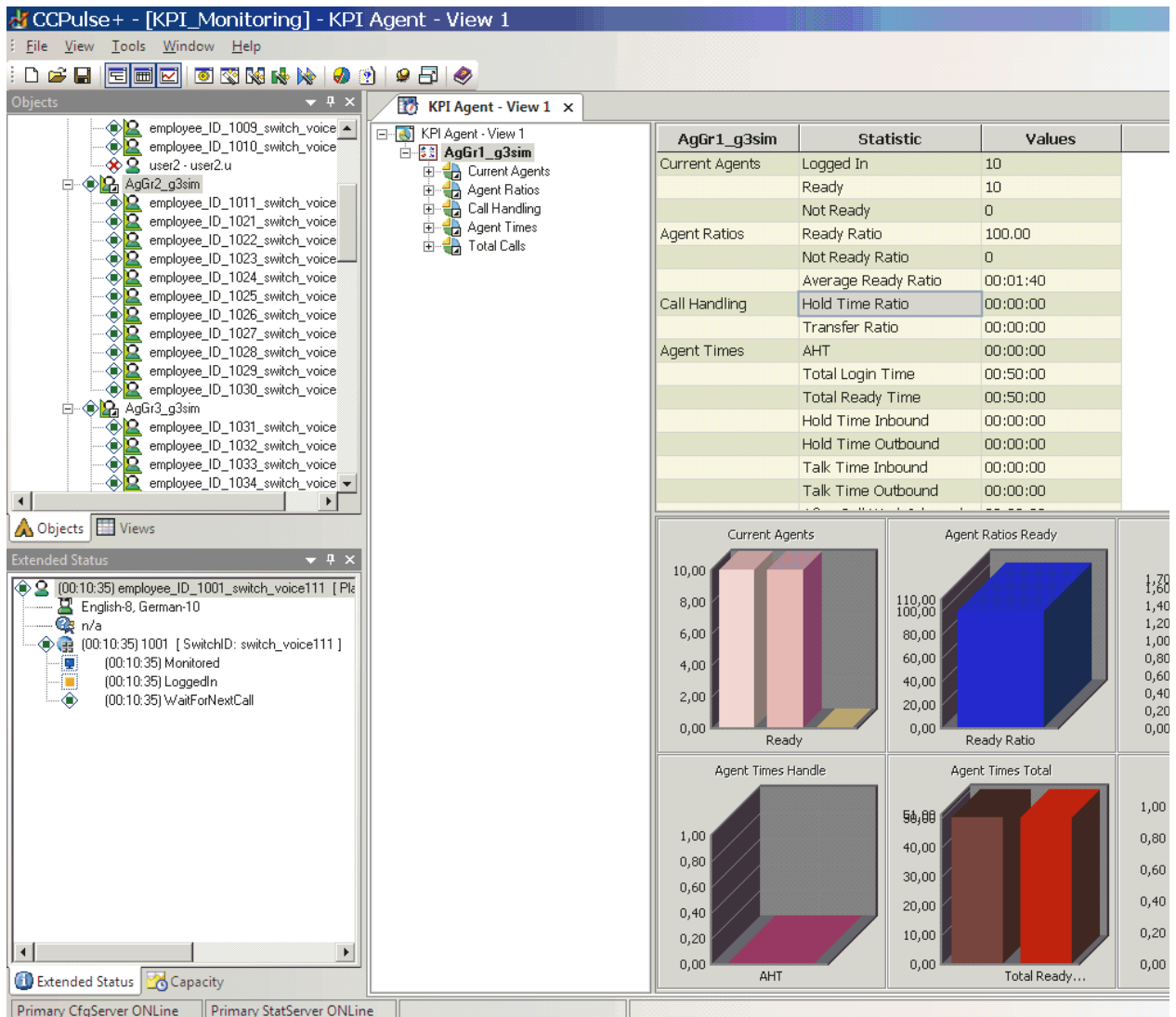


Figure 7: CCPulse+ View

CC Analyzer—Examining Historical Performance

CC Analyzer draws on the collected and aggregated statistical values for selected contact center objects. More specifically, CC Analyzer enables users to:

- Generate canned reports, that is, reports based on pre-made layout templates that are included with CC Analyzer.
- Design custom reports and custom metrics.
- Drill down data to the 15-minute level.
- Use SAP Crystal Reports server to publish reports on the Web and schedule report generation.

CC Analyzer uses the SAP Crystal Reports report designer to provide GUI access to the data and to customize data presentation.

The Solution Reporting Databases

The Data Collection and Data Mart services use two databases:

- Operational Data Storage (ODS)—for statistics collection
- Data Mart—for report generation

Note: *At a minimum*, position these databases on separate physical hard drives or, better yet, on separate computers. Separating the read and write processes to and from each of the databases improves Solution Reporting performance.

Refer to the *Reporting 7.6 Deployment Guide* for additional important deployment considerations.



Chapter

2

Sources of Solution Reporting Data

This chapter provides an in-depth discussion of the sources of information for Genesys Solution Reporting and contains these sections:

- [Introduction, page 27](#)
- [The Genesys Call Model, page 30](#)
- [The Multimedia Interaction Model, page 48](#)
- [The Statistical Model, page 68](#)

Introduction

Genesys Solution Reporting collects, processes, organizes, and presents information about the behavior and performance of contact centers. More specifically, Solution Reporting collects information about interaction processing, agent performance, and behaviors of other contact center objects.

Information about interaction processing might include data about how many interactions pass through a contact center, arrival time at the contact center, their routing from one resource (for instance, a device) to another, their changing properties, and their termination.

Information about contact center objects might include the performance of resources and groups of resources, the most interesting of which (and most expensive) is the agent. Administrators might be interested in agent performance metrics such as average call-processing time, total time in the not-ready state, and so forth.

Physical Structure of Solution Reporting Sources

Figure 8 depicts the physical environment that enable this information to be gathered.

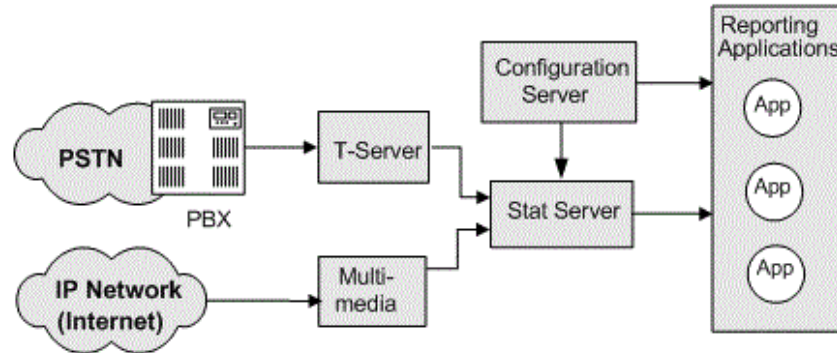


Figure 8: Sources of Solution Reporting Data

The main source of information about telephony interactions is Genesys T-Server, which communicates with telephony switching networks. T-Server tracks all telephony interactions and uses telephony events (TEvents) to report elementary interaction behavior to its clients. For object-centered data, Solution Reporting depends on combining events and producing metrics. Therefore, to report on telephony interactions in your contact center, you must deploy a Stat Server as well as a T-Server.

Note: Call Concentrator and Interaction Concentrator uses TEvents to store interaction-centered rather than object-centered reporting data.

Stat Server receives and processes raw information that it receives from T-Server, to meet the data requirements of object-centered Solution Reporting applications. By combining elementary events, Stat Server compiles a picture of the behavior of interactions and objects within a contact center and provides metrics to analyze performance.

Stat Server pulls information about the existence of objects such as agents, places, and groups from the Configuration Server. Then, using TEvents, Stat Server reconstructs the behavior for each object and makes that information available to the Reporting Layer. The Reporting Layer, in turn, reads information about the existence of objects from Configuration Server and about the status and behavior of those objects from Stat Server.

Multimedia-Based Solution Reporting

Genesys Multimedia is yet another source of interaction information. The Multimedia reports provide details about all interactions, including nontelephony interactions such as chat sessions, SMS, and e-mail. Along with the conventional telephony information and instant messaging processed by

Stat Server, Genesys Multimedia provides Internet-specific information that is stored in the Universal Contact Server database.

Genesys Multimedia uses the Interaction Server, to track e-mail and chat interactions. Stat Server uses data about these interactions to generate metrics on eServices interaction behavior.

Certain Multimedia reports require that you enable the Stat Server Java Extensions (SSJE) functionality. The extensions calculate data that is then supplied to Genesys Solution Reporting through Stat Server. The *Framework Stat Server Deployment Guide* describes how to enable Java functionality in Stat Server applications.

Note: Internet Contact Solution templates are not documented in this release of the *Reporting Technical Reference* series. For this information, refer to the *Reporting Technical Reference Guide for the Genesys 6.5 Release*.

Logical Structure of Solution Reporting Sources

In contrast with Figure 8 on [page 28](#), which illustrates the physical sources of Solution Reporting information, [Figure 9](#) shows the logical structure of these sources. The latter, more abstract representation captures data models, data flows, and so forth.

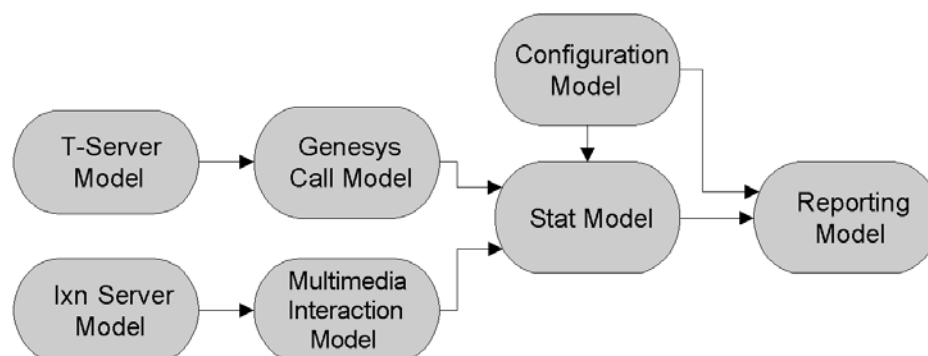


Figure 9: Logical Structure of Sources for Solution Reporting

The *Genesys Call Model*—an abstract representation of a switching network constructed and maintained by T-Server—is one foundation for these information sources. The Genesys Call Model draws on the T-Server Model and the Configuration Model, a representation of configuration data flow that is not described in this document. The Multimedia Interaction Model is another foundation of Solution Reporting information sources, with data flows that are specific to multimedia data sources, such as e-mail. The Multimedia Data Model uses Interaction Server rather than T-Server, and, like the Call Model, also draws on configuration data.

Stat Server takes the data provided from the Genesys Call Model and Genesys Multimedia Interaction Model sources and operates as described in the Statistical Model—an abstract representation of statistical information in a contact center. The Solution Reporting Model then is constructed on the basis of the Statistical Model and the Configuration Model.

The Genesys Call Model

The Genesys Call Model is, in essence, a telephony model based on TEvents generated by T-Server. (References to T-Server include a Session Initiation Protocol T-Server, or SIP Server.) Genesys T-Server, a key element of the Genesys platform, serves as a gateway between the switching and computing environments by monitoring and controlling switching functions for different contact center applications. [Figure 10](#) illustrates the T-Server environment.

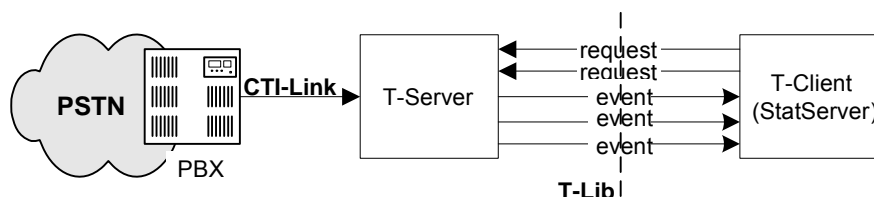


Figure 10: T-Server Environment

T-Server is connected to a switch (for instance, a PBX) through a CTI link and a communications protocol stack (with CTI at the top). Typically, the CTI link is vendor-specific. Genesys has implemented a separate T-Server for each CTI link. The T-Server veils vendor-specific switch features and provides access to information on the telephony side that is transparent to other Genesys applications. In other words, T-Server provides its clients with a unified interface based on a common telephony call model and implemented within the Telephony Library (T-Library). T-Library serves as a media-independent interface between a T-Server client, such as Stat Server, and a T-Server.

Note: This discussion assumes a telephony-based system. For a discussion of how Genesys Multimedia handles multimedia interactions, see “The Multimedia Interaction Model” on [page 48](#).

T-Server sends events to its clients to inform them about processes within the switching domain. Likewise, T-Server clients send requests to T-Server to control switching functions. These requests are not relevant for Solution Reporting, because you need only be concerned with monitoring switching domain behavior. For more information on controlling functions, refer to the *Genesys 7 Events and Models Reference Manual*.

You must understand the call model to understand how telephony networks operate. From the technical point of view, think of a call model as an abstract,

virtual state machine representing users, terminals, and/or network behavior during the establishment, processing, and ending of an interaction.

This document considers only the basic principles of the Genesys Call Model. You can find a more detailed specification in the Framework T-Server documentation.

Call Model Structure

The Genesys Call Model is specified using objects that form a call model structure. This specification describes the evolution (or behavior) of the structure.

This structure is described using five types of objects:

- Device object
- Agent object
- Call object
- Attached data object
- Party object

[Figure 11](#) depicts an example of the basic call model.

The call consists of two Device objects, identified by directory numbers **a** and **b**. Device **b** is associated with the Agent object, which represents an actual agent in a contact center. Device **a** is associated with a customer. So this call structure contains two participants.

The Call object, identified by **A**, is the core element uniting all other object types. For instance, call **A** might link to user data, represented in the figure by the Attached Data object. This call structure has two Party objects, identified by **(a, A)** and **(b, A)**. These Party objects represent the combination of a Device object with its user and the Call object. The Party objects store information about states of the participants in the call.

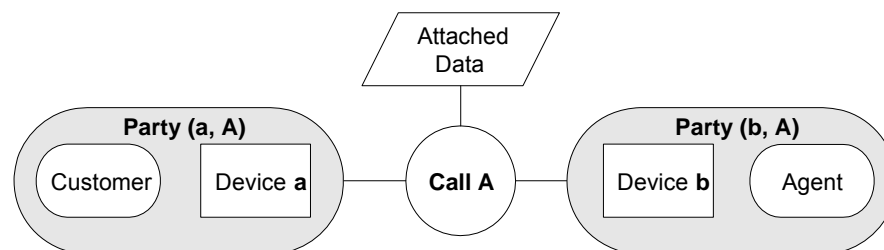


Figure 11: Structure of Simple Call

Call structure might vary over time. Object states might change during the progress of a call without changing the call's overall structure. For example, one participant can press the Hold button on the telephone device, putting the corresponding party into a Held state. Or call evolution might change the call structure. For example, transferring the call to another device deletes one Party object and creates a new one.

Apart from the simple call structure (depicted in [Figure 11](#)), the Genesys Call Model accommodates other, more sophisticated, call configurations. [Figure 12](#)

depicts a different call structure, a consultation call where Device b is connected to two separate calls: **A** and **B**. Call **A** represents the typical call between a customer and Agent 1. Call **B** represents a consulting call that connects Agent 1 to Device c of Agent 2. Attached data might be available for both normal and consultations.

Note: In general, attached data objects associated with different calls contain different information.

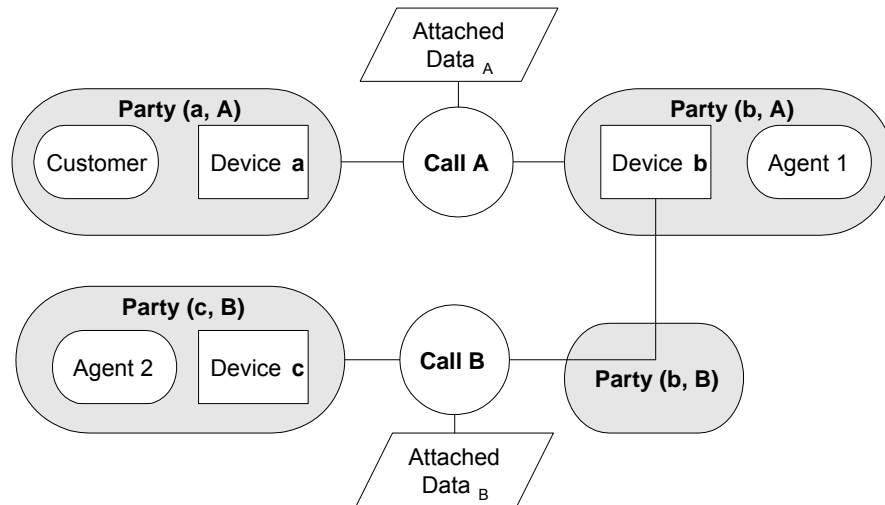


Figure 12: Consultation Call

[Figure 13](#) demonstrates another sophisticated call configuration: a conference call. This structure occurs when two or more parties are simultaneously participating in a single call. This example also has three parties: Agent 1, Agent 2, and Customer.

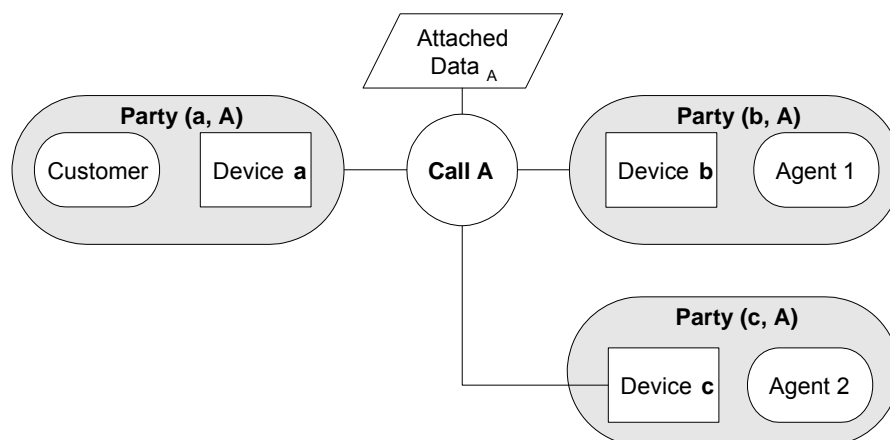


Figure 13: Conference Call

Triggering events, known as TEvents, track a call's evolution. Typically, TEvents signal changes in the status of a specific Call object. The relation of

events and objects is discussed in more detail later in this chapter. Specific event descriptions are provided during a discussion of Call Model objects in “T-Server Model” on [page 43](#).

Telephony Events and Their Structure

T-Server uses TEvents to notify its clients about object changes. To receive TEvents, a client must be registered on a directory number (DN). The client receives events related to this DN. If several clients are registered on the same DN, T-Server distributes events related to this DN to all registered clients.

[Table 1](#) lists some fundamental event attributes.

Note: For the full set of event attributes, see the *Genesys 7 Events and Models Reference Manual*.

Table 1: T-Server Event Attributes

| Attribute | Description |
|------------|---|
| ThisDN | The directory number, or identifier, of the device to which this event is related. |
| OtherDN | The attribute indicating the other device involved in a call. For example, for a two-party call, OtherDN might indicate the called device. |
| ConnID | The current call identifier to which this event is related. |
| ANI | The Automatic Number Identification indicating the calling party's directory number. For example, for an inbound call, ANI indicates the customer's number. Once established, this attribute cannot be changed. |
| DNIS | The Dialed Number Information Service indicating the directory number to which the inbound call was made. For example, for an inbound call, DNIS indicates the 800 number that the customer calls. Once established, this attribute cannot be changed. |
| CustomerID | The attribute indicating the tenant ID in a multi-tenant environment. |
| CallType | One of the following five types of calls: inbound, outbound, internal, consulting, and unknown. The call-type attribute is set at the creation of the call and does not change during the duration of the call. The only exception is the call of type unknown, which might be changed once another call type is established |

Table 1: T-Server Event Attributes (Continued)

| Attribute | Description |
|----------------|---|
| PreviousConnID | The attribute linking two associated calls. For example, events relating to consultation calls might have PreviousConnID indicating the originating call. |
| AgentID | The parameter uniquely identifying an agent registered in the Automatic Call Distribution (ACD) queue. |
| CallState | An attribute that refines the reason for changing a party's state. An example is the Redirected attribute of the EventReleased TEvent, which indicates that a call has been redirected in accordance with a forwarding service. |
| WorkMode | The attribute indicating the agent's current work mode. For example, work mode can be AfterCallWork, signaling that the agent is still working on the call (for example, updating customer records) following call termination. |
| UserData | The attribute indicating user-related data (Attached User Data). |

All TEvents are classified into one of the following groups:

- **Network Status Events**—TEvents indicating the status of the CTI link and connections between T-Server and its clients. If either status changes, the corresponding TEvents are sent to all T-Server clients. These events relate neither to a specific device nor to a specific call.
- **Call-Related Events**—TEvents indicating how a particular call is processed; therefore, the events must have Thi sDN and ConnID attributes.
- **Device Feature Events**—Device-specific TEvents not relating to, or in the absence of, a particular call. For example, the EventDNDOn TEvent is invoked when the corresponding button is pressed on the telephony set. This group of events must have the Thi sDN attribute but need not contain the ConnID attribute.
- **Agent-Status Events**—TEvents reporting agent behavior in using the special capabilities of a telephone set or soft phone. All events in this group contain the Thi sDN attribute but not the ConnID attribute.
- **Special Event**—The EventUserEvent TEvent initiated by one client and distributed to all registered clients. This event is used for data exchange and to synchronize T-Server clients with T-Server.

Device Object

A Device object is an object representing a physical or virtual device. The three types of Device objects are Regular device, ACD Queue device, and

Routing Point device. The Device object is identified by a unique directory number (DN), which calls for three corresponding types of DNs: Regular DN, Queue DN, and Routing Point DN. In the following discussion, Device objects are sometimes referred to as DNs.

A terminal or physical device, such as a telephone on an agent desktop, is a Regular Device object. Regular DNs might also represent other types of devices such as chat DNs, e-mail DNs, IVR DNs, and so forth.

An ACD queue device corresponds to the ACD queue of a switch, which holds interactions waiting to be distributed to other devices. A built-in switch mechanism performs distribution. Sometimes, an ACD queue is simply referred to as a queue.

Routing to the Correct Device

A routing algorithm, or strategy, loaded on or applied to a Routing Point DN determines the most suitable target or destination DN for distribution out of a queue. Genesys Universal Routing, which includes both Enterprise Routing and Network Routing, supports this functionality. You can customize a routing strategy to account for many factors, such as agent availability, agent skills, cost, time of day, load, and so forth. The main difference between the ACD queue and Routing Point devices is *where* the routing algorithm is executed, whether by the switch or the Router.

Regular Device State Machines

A regular device emits device-specific events, whether or not the device participates in a call. These events are sometimes referred to as noncall-specific events.

Think of the structure of the regular device model as a device state machine (see [Figure 14](#)) that consists of three independent state machines working in parallel (see [Figure 15](#)).

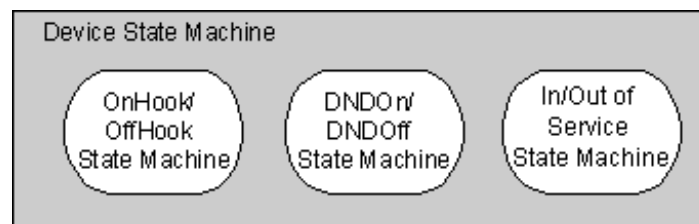


Figure 14: Device State-Machine Structure

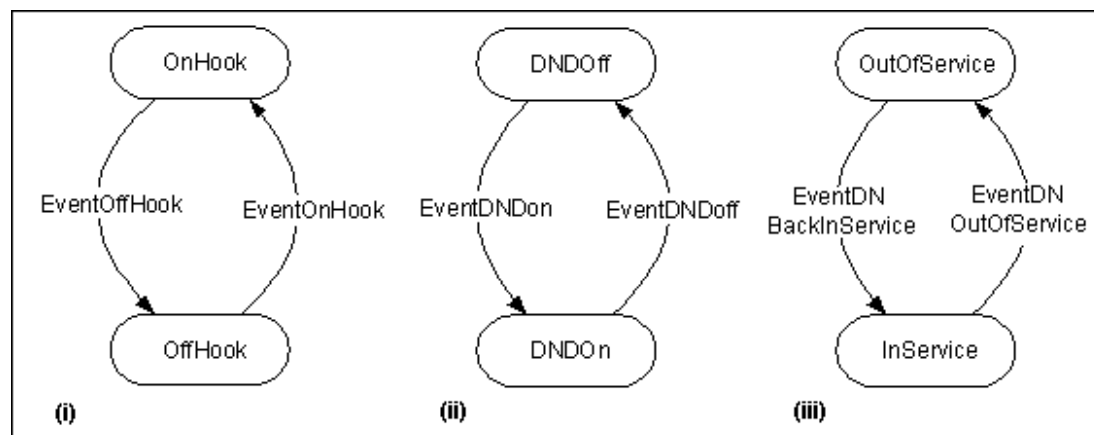


Figure 15: Regular Device-State Machines

The first machine **(i)** represents On/Off Hook functionality and corresponds to the state of a receiver, if any. When an agent hangs up the receiver, the state machine changes from the OffHook state to the OnHook state and triggers the EventOnHook TEvent. When the agent picks up the receiver, the state machine returns to an OffHook state and triggers the EventOffHook TEvent.

The second state machine **(ii)** represents do-not-disturb (DND) functionality triggered when the agent presses the Do Not Disturb button on a telephone set. Two events, EventDNDOn and EventDNDOff, report state changes. The device cannot receive any calls while in a DNDOn state.

Agent Object

The *Agent object* is associated with a contact center operator (a human being) using a regular device. However, the agent appears to the Genesys environment only when operating equipment attached to a device, such as when the agent presses the Ready, NotReady, LogIn, and LogOut buttons.

Note: Genesys SoftPhone, a third-party desktop application that provides agents with telephone functionality by way of a graphical user interface, also emulates this functionality.

In order to cover a wide range of vendor ACD models, the generic T-Server model is represented as a collection of independent state machines running concurrently. Two such machines appear in [Figure 16](#). [Figure 17](#) presents these state machines in more detail.

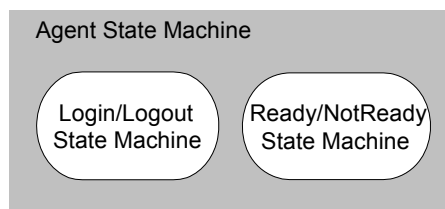


Figure 16: Structure of Agent State Machines

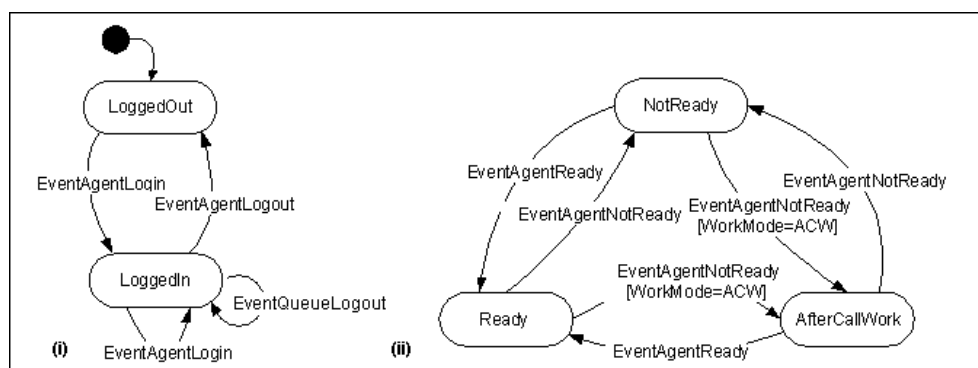


Figure 17: Agent State Machines

Login/Logout State Machine

The first state machine (i) in Figure 17 illustrates login behavior. When the agent performs a login operation, it triggers the EventAgentLogin TEvent and the agent's state machine changes to a LoggedIn state. While in this state, the agent can perform other login operations to another ACD Queue illustrated by loop transitions. A logout operation triggers the EventAgentLogout TEvent, and the state machine returns to a LoggedOut state. Note that as a rule, while the agent is in the LoggedOut state, the device cannot receive calls from ACD queues and might receive only direct calls (including those routed by URS).

Ready/Not Ready State Machine

The second state machine (ii) depicts the readiness of an agent—usually triggered by pressing the Ready/NotReady button on the telephone set. The current state is indicated by a special marker on the set, such as the presence, or absence, of a blinking arrow. The state machine in Figure 17 shows three states: NotReady, Ready, and AfterCallWork. Each transition from one state to another triggers a TEvent. For example, a transition to an AfterCallWork state triggers the EventAgentNotReady TEvent and sets the WorkMode attribute to AfterCallWork (ACW).

Note: The second state machine (ii) has neither initial nor final states (represented in (i) by a black circle). That means that during switch and/or T-Server initialization, the state can be set randomly.

Keep in mind that representation of the Agent object at T-Server level is very limited. The Agent object in the Genesys environment is merely an extension of the regular device. Indeed, knowing that an agent pressed the Ready button does not truly indicate that agent's availability to accept calls. The agent might subsequently step away from his/her desk or otherwise be unable to accept the next call.

Figure 18 depicts the agent model. Suppose that an agent has two telephone sets. That means two DNs are associated with that agent. Each DN might be associated with one or more parties.

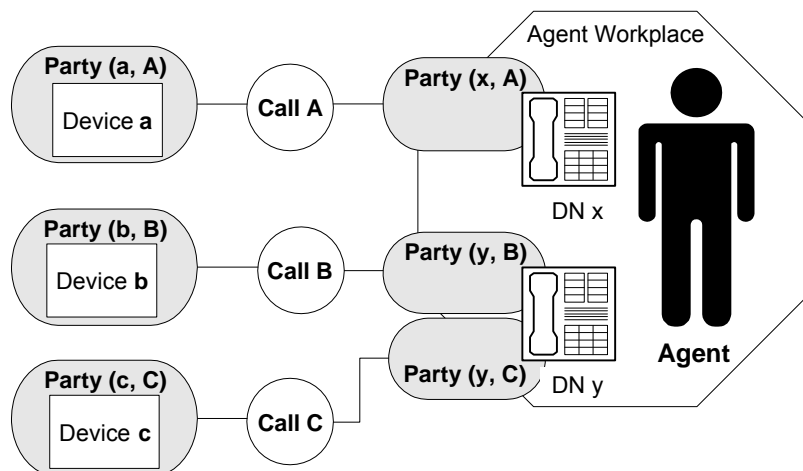


Figure 18: Agent's Environment

In our example, DN *x* participates in one call and DN *y* participates in two calls, one of those being a consultation. The real status of the agent (Ready or NotReady) is constructed based on three Party state machines, two Device state machines, and two Agent state machines. The Ready/NotReady Agent state machine describes agent behavior related to the corresponding DNs; in a case such as that shown in Figure 18, the state of the Agent object is constructed by compiling behavior for all three calls and presenting it as though it came from one DN.

A more adequate agent model can be built on top of these state machines by also considering the call-related states of the agent device(s). Later, you will see how the agent model becomes more sophisticated within Stat Server.

Call Object

The function of the Call object is to group all devices (participants) in the call. The Call object is uniquely identified within T-Server by the ConnID identifier, which might be present in events. The ConnID might not have a counterpart in the switching domain. The Call object is not associated with any particular state machine, so it has no states. However, the total state of the call can be determined by the states of all associated parties.

The Call object has some inherent attributes such as call type—inbound, outbound, internal, consulting, or unknown. A Call object is labeled *inbound* when the originating device of the call falls outside the domain controlled by T-Server. If the originator of the call is within T-Server's domain and the destination is outside, the call type is *outbound*. A two-party call with both parties falling within T-Server's domain is *internal*. And a call originating from a device already participating in an existing call is termed *consulting*. If T-Server cannot identify the call type as one of these four, its attribute is set to *unknown*.

The Call object might also have ANI and DNIS attributes (see Table 1 on [page 33](#)). If it does, these attributes are set at call creation and usually do not change for the duration of the call.

Party Object

The Party object represents the association between a call and a device. The Party object exists only if the corresponding Call and Device objects exist within T-Server. Therefore, the Party object is entirely identified by the pair ConnID and DN.

Three types of state machines can show Party object behavior: regular device, ACD queue, and Routing Point.

State Machine for a Party Object on a Regular DN

The simplified version of a state machine corresponding to a party on a regular DN is depicted in [Figure 19](#). In the initial state, no relationship exists between a Device object and a Call object; that is, a Party object does not exist. A Party object is created when either the EventDialing or EventRinging TEvent is triggered; the state machines assume the Dialing or Ringing state respectively.

Party-object transitions from state to state trigger the TEvents shown in [Figure 19](#).

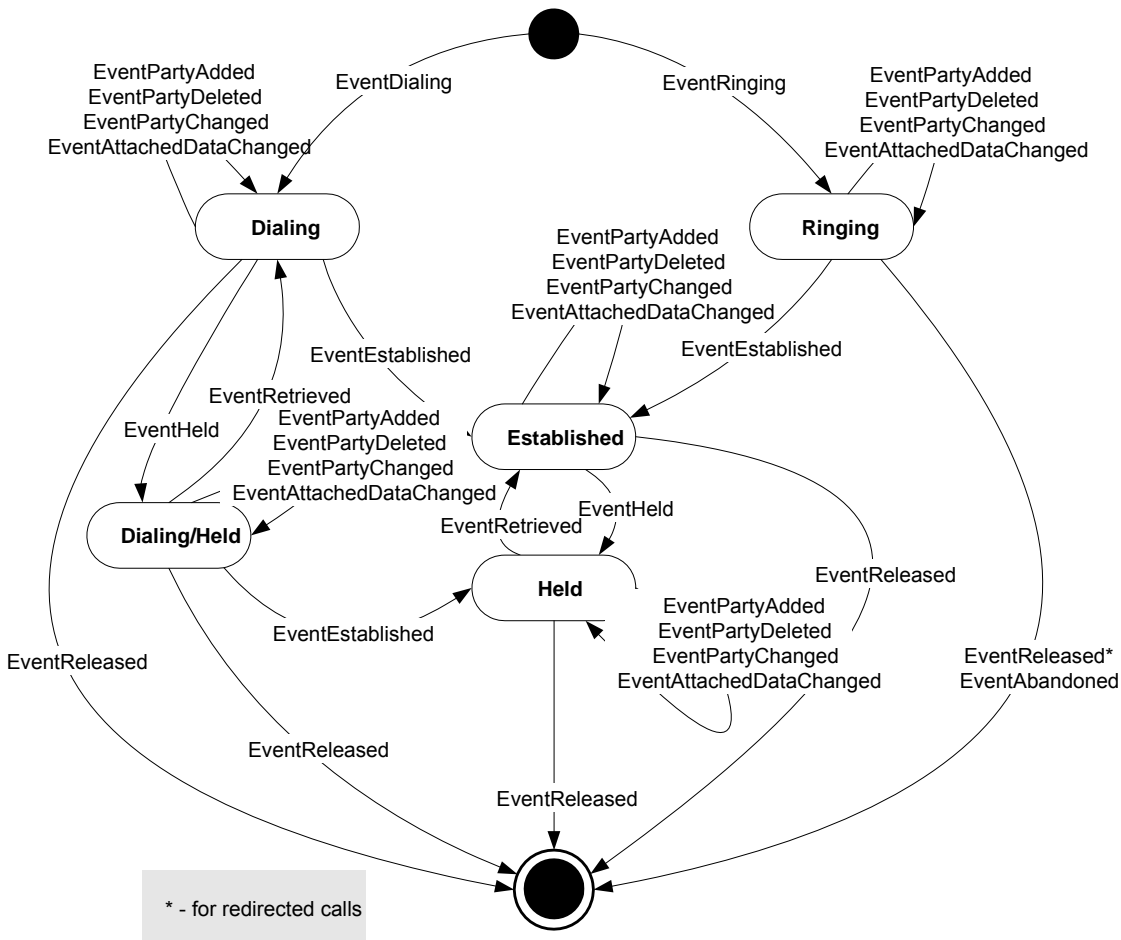


Figure 19: State Diagram for a Regular Party

Note: In Figure 19, one transition labeled by several events actually represents several different transitions with the corresponding events. For example, the transition labeled:

EventPartyAdded
EventPartyDeleted
EventPartyChanged
EventAttachedDataChanged

in the upper right-hand corner for the Ringing state should actually be depicted as four separate transitions. Likewise for the other five multilabeled transitions in this figure.

- A Dialing state occurs when the device requests a connection service and waits for a reply.
- In the Ringing state, the device alerts (rings) the agent that an attempt to connect a call to the device is being made.

- The **Established** state occurs when the device actively participates in the call; that is, the device is physically connected to a voice stream.
- The **Held** state occurs when the device is inactive, not participating in the call, has no voice stream.
- Similar to the **Held** state, the **Dialing/Held** state occurs when the transition to **Held** state happens during dialing (before a connection is established).

Note: The loop transition labeled by the `EventPartyChanged` TEvent might terminate one party and add another party on another call. This might happen for consultations in a two-step transfer or in a conferencing procedure.

State Machine for a Party Object on a Queue

The state machine for a Party object connected to an ACD queue is shown in [Figure 20](#). The state machine exists in the **Queued** state as well as in initial and final states. A Party object is created when the `EventQueued` TEvent triggers and the state machine enters the **Queued** state, indicating that an interaction (a call, for example) will wait in queue for distribution to another device. Successful distribution triggers the `EventDiverted` TEvent, and the Party object ceases to exist (that is, it enters its final state—nonexistence). The call might also leave the ACD queue abnormally, if, for example, the caller hangs up the receiver, which triggers `EventAbandoned`.

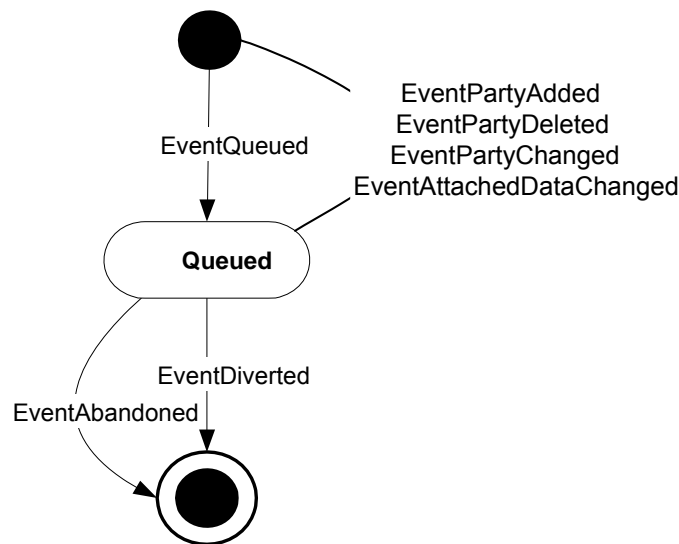


Figure 20: ACD Queue Party State Diagram

State Machine for a Party Object on a Routing Point

You can see a simplified version of a state machine for a Party object related to a Routing Point device in [Figure 21](#). It resembles the state machine for Party objects related to ACD queues in [Figure 20](#); however, [Figure 21](#) illustrates

different TEvents. Furthermore, the Queued state now has its own state machine that indicates when treatments (playing a music file while the call is waiting, for example) are applied or removed.

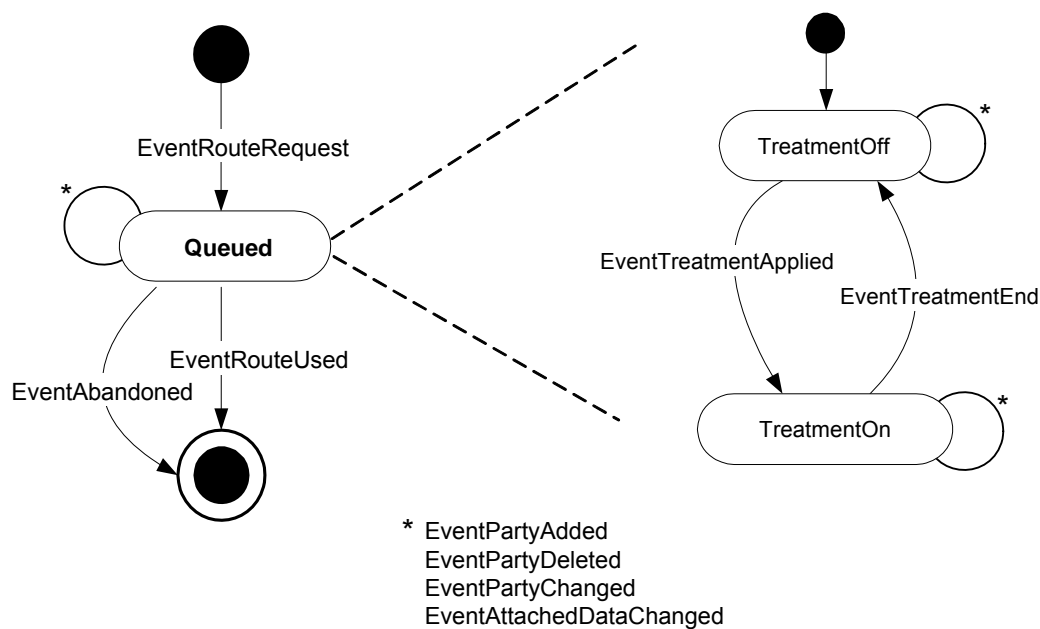


Figure 21: Party State Diagram for a Routing Point

Attached Data Object

The Attached Data object, which is associated with a Call object, collects and/or manipulates user data during call processing. The Attached Data object is created when the Call object is created. Initially, it might contain a null value.

User data is organized into a list of key-value pairs called a TKV-List. Each key-value pair structure consists of a character key plus a character, integer, list, or binary value. The following is a sample TKV-List with three TKV pairs:

```

("CS", "Platinum")
("Service", "E-Mail")
("Revenue", "2459.29")

```

The first pair identifies the customer segment as Platinum; the second identifies the current interaction as e-mail; the third presents this interaction's revenue.

Any participating party might add or modify data through T-Server and a third-party control technique. When one participant modifies attached data, all other call participants receive the EventAttachedDataChanged TEvent. More precisely, the event is received by clients registered on participating DNs.

Network Object

T-Server conveys information about the status of the CTI link and connections between T-Server and its clients when certain system events are triggered. These events stem from a System object called the Network object, which operates according to two independent state machines (see [Figure 22](#)).

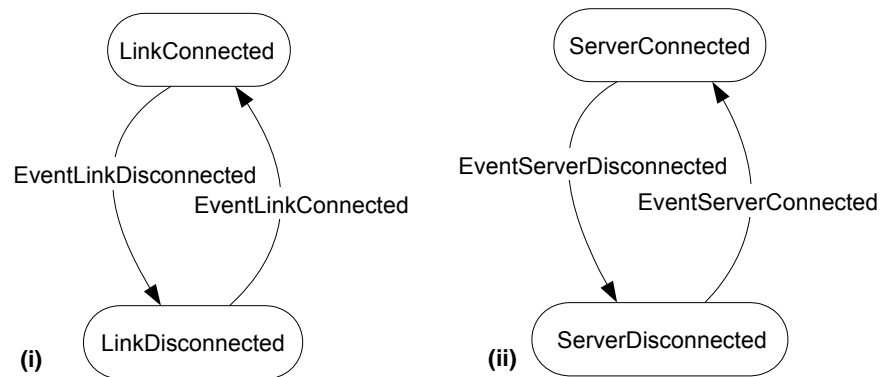


Figure 22: Network State Machines

The first state machine **(i)** models a CTI link that might exist either in connected or in disconnected state. The status of a link between T-Server and a switch (CTI link) is reported by the EventLinkConnected and EventLinkDisconnected T-Events.

The second state machine **(ii)** depicts the status of a link between T-Server and its client: either in connected or in disconnected state. The EventServerConnected and EventServerDisconnected TEvents report status changes.

T-Server Model

Conceptually, the whole T-Server environment is as a container for objects and object configurations (see [Figure 23](#)).

T-Server contains configurations comprising Call Model objects (Call, Party, Device, and Attached Data objects). For instance, in [Figure 23](#), Call object **A** represents a typical two-party call with regular devices. Call object **B** represents a conference call with three participants and attached data. Call objects **C** and **D** share the same regular device, which occurs when one Call object, say **D**, is a consultation and the party associated with Call object **C** and its associated device is placed in Held state.

Call objects **E**, **F**, and **G** are waiting in an ACD queue device labeled **Q**. Call objects **H** and **J** wait in a queue on a Routing Point device labeled **RP**.

The Network object can trigger events about the status of connections; namely, EventLinkConnected, EventLinkDisconnected, EventServerConnected, and EventServerDisconnected.

Figure 23 also shows that T-Server monitors DNs that are not currently involved in calls and sends events concerning them to its clients. For instance, regular devices not participating in calls might send out agent-related events (EventAgentReady, EventAgentNotReady, EventAgentLogin, EventAgentLogout), device-related events (EventDNDOn, EventDNDOff, EventOnHook, EventOffHook), and the special user event, EventUserEvent.

Note: Any of these calls can also contain attached data. For simplicity, Figure 23 does not show attached data.

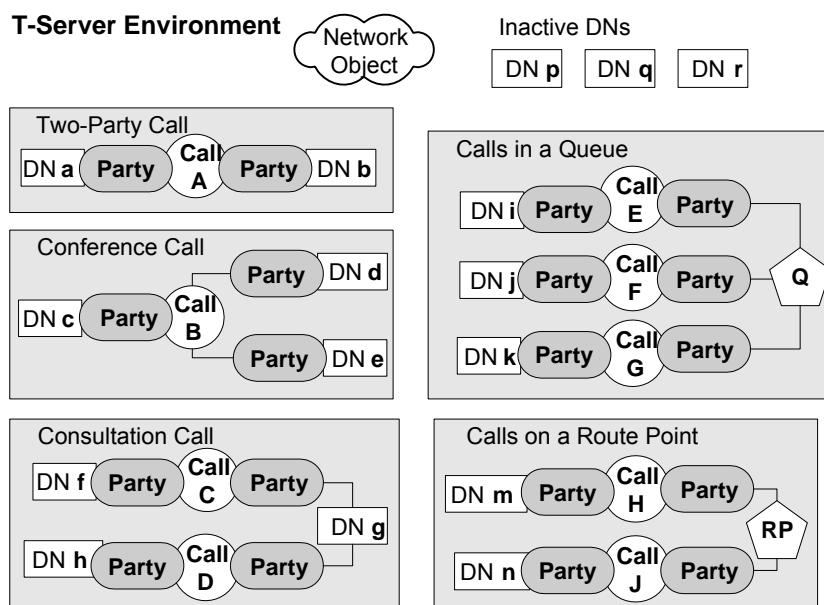


Figure 23: T-Server as a Container of Objects

Clients “see” all these call structures through events sent by T-Server. More precisely, they observe changes to the structures, but not the structures themselves. For instance, a client receiving the EventEstablishedTEvent is informed that the corresponding party has changed its state from a Dialing, Ringing, or Ringing/Held state to an Established state, but the exact state change is not identified.

The following section presents some examples of these call structures in action.

Example 1 Figure 24 demonstrates how a connection is established between two devices.

Suppose you have two devices (DNs), **a** and **b**. Device **b** is associated with an agent who performs a login operation. Device **a** initiates a connection to device **b**. In the initial state (1), there are only Device objects—no Call objects and no Party objects. Device **a** dials the number for device **b**. The structure transitions to state (2) where Call object **A** with Attached Data object **AD**, and Party object (**a**, **A**) have been created. The party is set in Dialing state. An EventDialingTEvent triggers this transition (i), with ThisDN equal to **a**.

In the next step (3), a Party object (**b, A**) between call **A** and device **b** is created and set to a Ringing state. The EventRinging TEvent triggers this transition (ii) and ThisDN is now set to **b**.

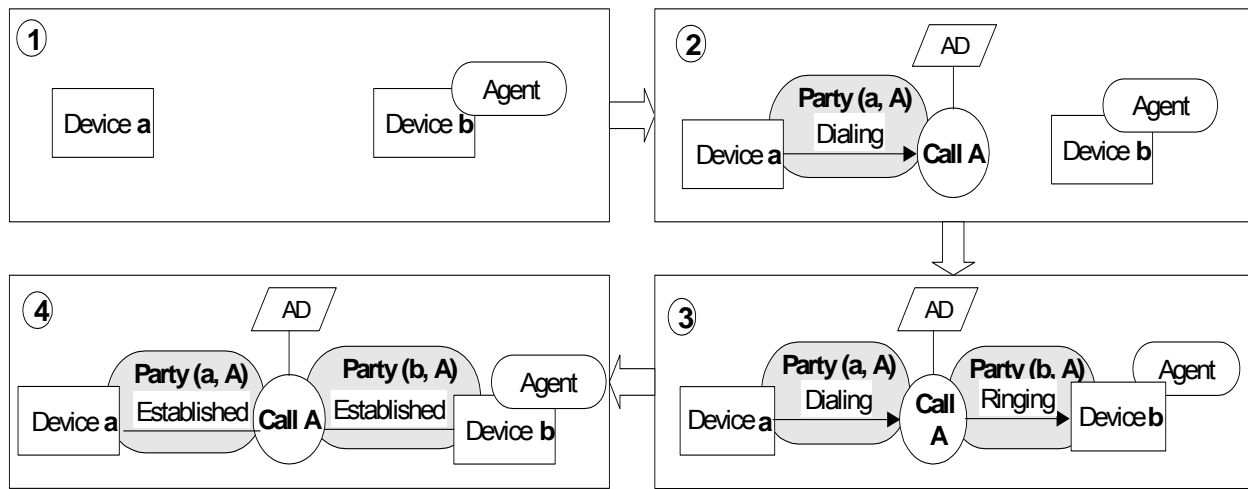


Figure 24: Connecting Two Devices

Finally, after device **b** answers, the configuration is transferred into its final state (4) representing an established connection and a voice stream between devices **a** and **b**. Two EventEstablished TEvents are triggered to change both parties to an Established state.

Example 2 Figure 25 illustrates the completion of a two-step transfer.

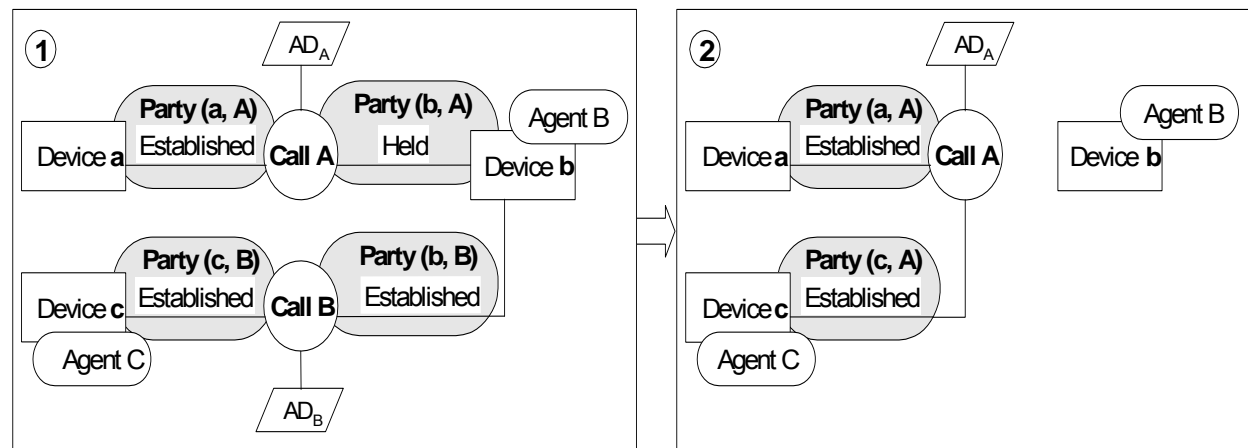


Figure 25: Completing a Two-Step Transfer

In the initial state (1), Agent **B** handles two calls—one of them a call (**A**) to a customer, the other (**B**), a consultation with Agent **C**. Call object **A** is on hold (its party in Held state) as Agent **B** is currently consulting with Agent **C**. During consultation, Agent **B** decides to connect the customer to Agent **C** and leave the conversation. To accomplish this, s/he must transfer the call. During this transition (2), Call object **B** is deleted along with its attached data (**AD_B**). Parties (**b, A**) and (**b, B**) are also terminated when two triggered EventReleased

TEvents and corresponding Thi sDN parameters are sent. The **(c, B)** party was terminated and a new party **(c, A)** was created with a new ConnID parameter when T-Server sent the EventPartyChanged TEvent.

Example 3 Figure 26 illustrates how a consultation evolves into a conference call. It resembles the previous example except that agent **B** does not leave the call; therefore, the **(b, A)** party is not removed.

The TEvents triggered also differ. For parties **(a, A)** and **(b, A)** an EventPartyAdded TEvent is triggered indicating that another participant has joined the conversation.

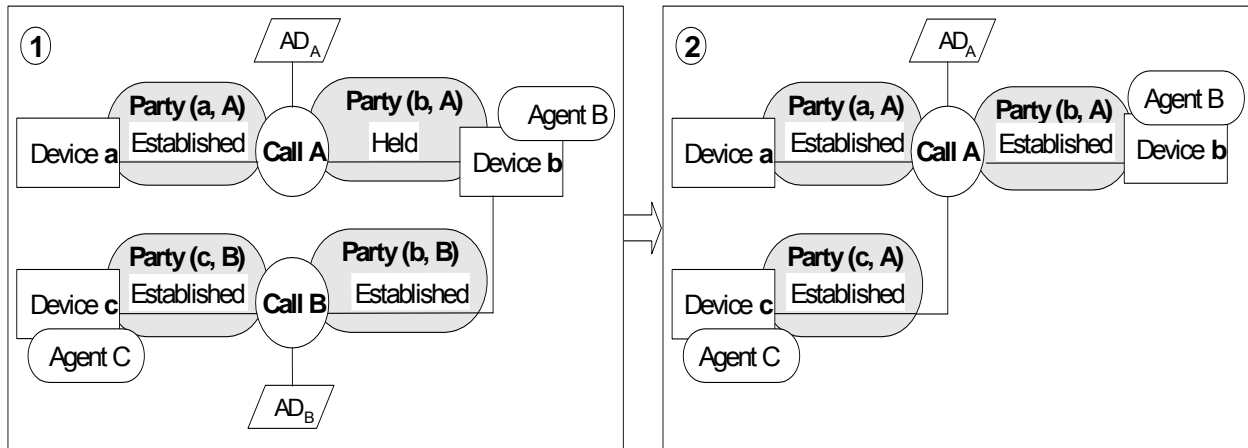


Figure 26: Evolving from a Consultation to a Conference Call

Example 4 Figure 27 illustrates routing a call. In the initial state (1), the call is connected to ACD queue device **b**. The **(a, A)** party is in *Dialing* state and the **(b, A)** party is in *Queued* state, waiting for distribution to an agent.

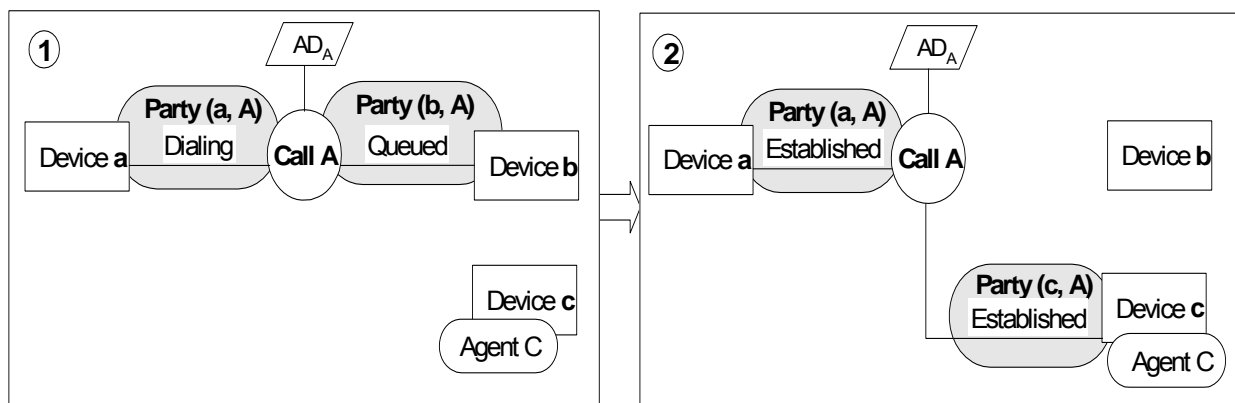


Figure 27: Call-Routing Scenario

Suppose that Agent **C** with device **c** is logged in to ACD queue device **b**. Further suppose that the ACD queue device distributes the call to device **c**. In final state (2), the call is connected to device **c** and both parties are in the Connected state. The transformation is triggered by the following events:

- The **(b, A)** party triggers an EventDiverged TEvent and disappears.

- The **(c, A)** party is created and enters Ringing state, triggering the EventRinging TEvent.
- After the call is answered on device **c**, parties **(a, A)** and **(c, A)** are transferred to Connected state and both trigger EventEstablished T-Events.

The routing via Routing Point device is similar to routing via ACD except that the disappearing party **(b, A)** triggers the EventRouteUsed TEvent.

Note: For more call scenarios, see the *Genesys 7 Events and Models Reference Manual*.

Are TEvents Suitable for Solution Reporting?

As you have seen, the main purpose of T-Server is to send TEvents to registered clients that make visible and controllable the processes occurring within a switching network. T-Server generates TEvents in accordance with the Call Model, an abstract representation of the switching network objects and processes that are of interest to the clients.

TEvents are an excellent data source for call-centered Solution Reporting, as done by Interaction Concentrator (ICON) and Genesys Info Mart (GIM). But does this functionality provide data usable for object centered Solution Reporting? In fact, TEvents are raw material that must be refined and processed before it is suitable for Solution Reporting on objects instead of calls.

For example, TEvents themselves do not say much about processes in a switching network. One TEvent might correspond to any number of different actions within a network. Moreover, an event often tells about only the part of a network action that is linked to one device or party. (Note that a party is determined and accessed by its DN.)

For example, a transfer is reported by four events related to the various parties involved. The four events can be combined to recreate the call history, as in ICON/GIM-based reporting, or they can be synthesized and interpreted to recreate the actions and statuses of the contact center objects involved.

Reporting on actions and states of objects such as agents, workplaces, groups, and so forth, require such synthesized information so they can then present it in natural terms. For example, to understand agent activity, a report on agent after-call work status is more useful than a sequence of EventReleased and EventAgentReady TEvents. In addition, the synthesis required for such object-centered Solution Reporting also enables you to create reports on the number and duration of certain object actions or statuses—that is, metrics.

Clearly, there is a significant gap between what T-Server provides and what object-centered Solution Reporting applications require. Genesys Stat Server fills this gap. For a discussion of Stat Server use of TEvents, see “The Statistical Model” on [page 68](#).

The Multimedia Interaction Model

This section provides an in-depth discussion of the sources of multimedia interaction information for Solution Reporting. This section describes Genesys Multimedia from a Solution Reporting point of view. For more information on Genesys Multimedia capabilities and components, refer to the eServices documentation set.

This section covers these topics:

- [Multimedia Interaction Model Overview, page 48](#)
- [Structure of the Interaction Model, page 52](#)
- [Typical Interaction Scenarios, page 56](#)
- [E-Mail Processing Example, page 63](#)

Note: This section covers the multimedia interaction types provided by Genesys Multimedia. If you are using the Open Media functionality to create custom reporting on additional media types, refer to the *Customization* book of the *Reporting Technical Reference* series.

Multimedia Interaction Model Overview

Genesys Multimedia enables users to route, track, and report on multimedia interactions. Because these interactions do not arrive through a telephony switch and, notably in the case of e-mail, are not necessarily handled as they arrive, they require a different interaction model than the telephony interactions analyzed in the preceding sections.

Multimedia Interaction Environment

The environment in which eServices operates is shown in Figure 22 on [page 43](#). The eServices environment contains several media servers connected to an IP network. [Figure 22](#) shows the Web API Server, which sends multimedia on to one of two media servers, the E-mail Server Java or the Chat Server. E-mail also enters Multimedia through POP3 servers and is sent to E-mail Server Java. These media servers are connected to Interaction Server, which processes all interactions in a unified way. The E-mail Server Java and the Chat Server are also connected, both directly and through Interaction Server, to Universal Contact Server (UCS), which stores all working information in the Universal Contact Server database. For example, UCS and the Universal Contact Server database store all chat transcripts.

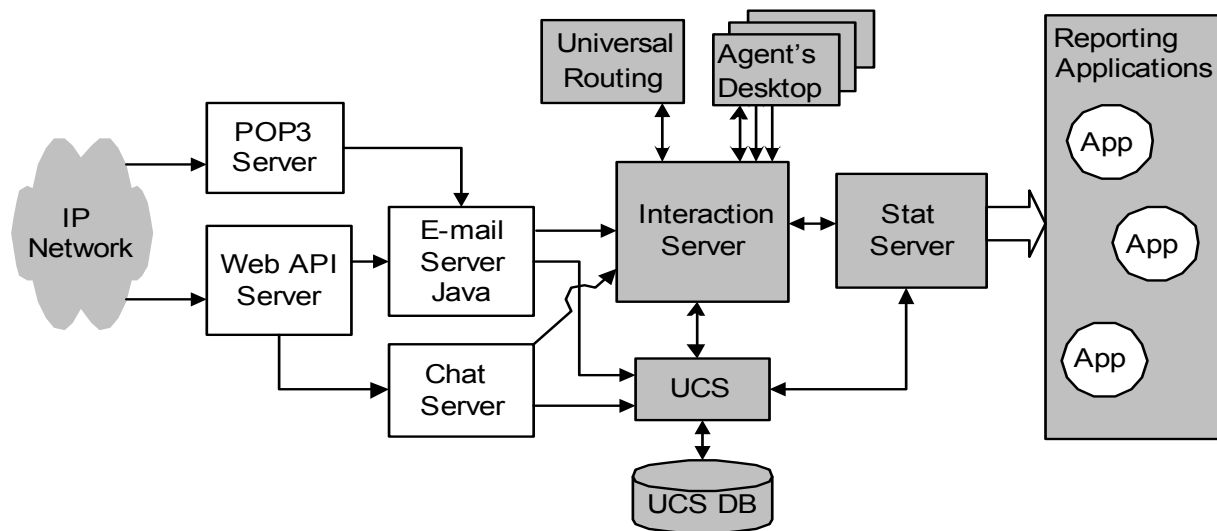


Figure 28: Genesys Multimedia Environment

Interaction Server

Interaction Server is also connected with Universal Routing 7.0.1 or higher, which determines the destination of incoming interactions. Agents in Genesys Multimedia are represented by their desktops, which are connected to Interaction Server.

Interaction Server reports on all its interaction processing, in the form of Events, to Stat Server using a special reporting link. After some preprocessing, this reporting information is transferred to the Solution Reporting applications.

Universal Contact Server

UCS writes information about multimedia interactions to the Universal Contact Server database. The data includes:

- Data about each interaction, such as the InteractionID and the various objects with which the interaction has been associated
- The category to which each interaction belongs to (chat or e-mail, inbound or outbound, and so on)
- A library of possible auto response messages, suggested or previously used responses for specific situations, and so on
- E-mail threads, chat transcripts, replay/response links, and so on

The following subsections describe how interactions are processed for both e-mail and chat.

Processing of E-Mail Interactions

Figure 29 illustrates the typical processing of inbound e-mail.

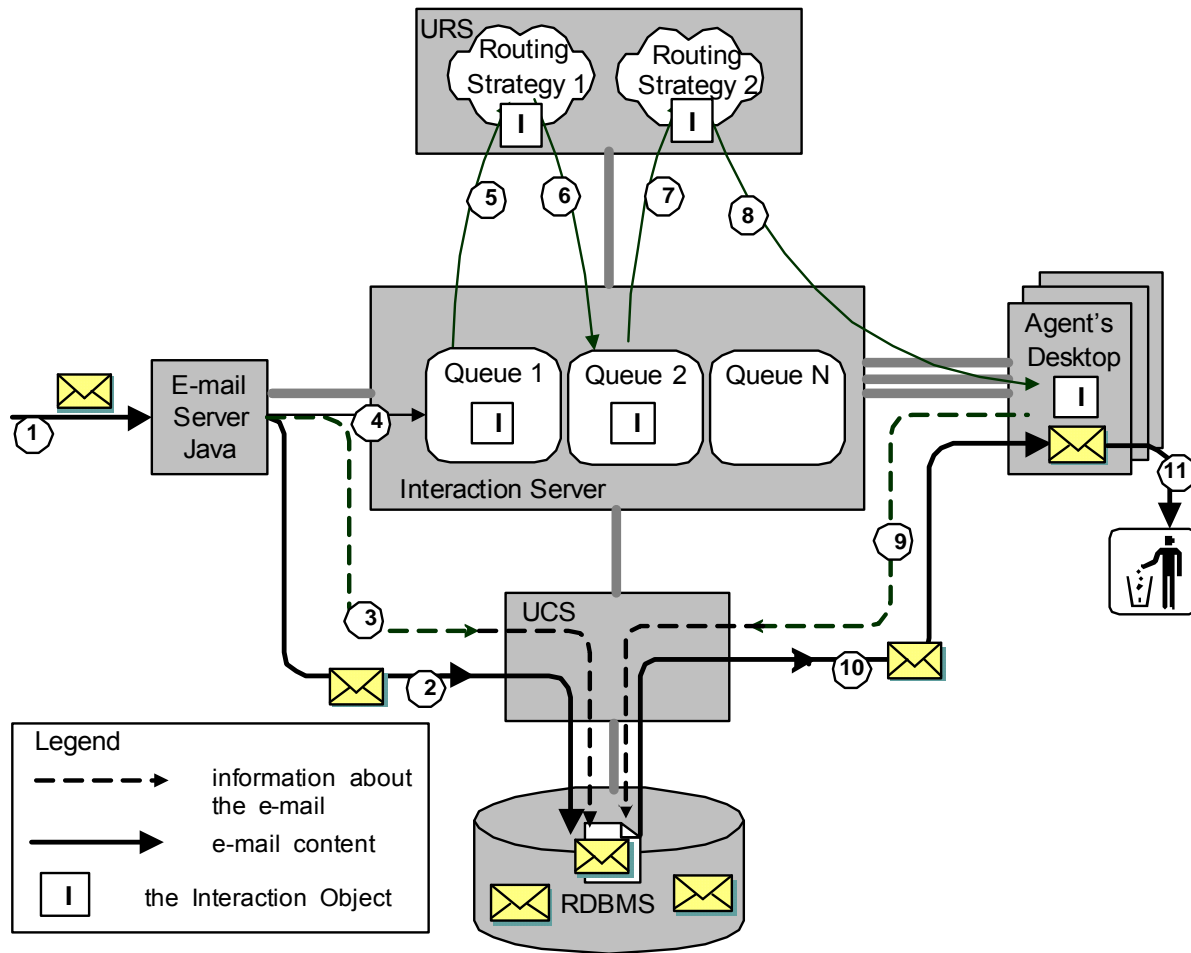


Figure 29: Processing of E-Mail Interactions

1. E-mail Server Java takes a new e-mail from the Internet POP server.
2. UCS records the e-mail in the Universal Contact Server database.
Some contact information taken from the e-mail header is stored in the database, such as names, addresses, and phone numbers. If the contact already exists in the database, this information can be matched to a contact history that already exists.
3. At the same time, Interaction Server creates a corresponding interaction object and places it in Queue_1.
4. Universal Routing Server (URS) takes the interaction from the queue and processes it with the aid of Routing Strategy_1. The strategy processes the interaction. It might invoke some external processor, such as Classification Server.
5. Based on the results of the routing strategy, URS places the interaction into Queue_2.

6. URS takes the interaction from Queue_2 and processes it using Routing Strategy_2. The processing also might involve external processing, such as sending an acknowledgement or an automatic reply, or applying a screening rule.
7. URS, guided by Routing Strategy_2, transfers the call to an agent desktop.
8. The agent receives information about the incoming e-mail and requests the e-mail content from UCS.
9. UCS retrieves the e-mail content and delivers it to the agent's desktop.
10. The agent works with the e-mail and, after processing, decides to stop processing this interaction. The interaction and the corresponding e-mail content are cleared from the agent's desktop.

Note: The e-mail content and corresponding control information are still kept in the Universal Contact Server database.

This is one of many possible scenarios for e-mail processing. For example, the agent might decide to return the e-mail interaction to a queue for further processing, or the agent might create an outbound e-mail interaction to reply to a customer. For a detailed example, see “E-Mail Processing Example” on [page 63](#).

You can configure some e-mail processing scenarios, such as acknowledgement and autoresponse, that do not require agent involvement. These e-mails are generated using routing strategies.

Processing of Chat Interactions

The processing of a chat interaction is similar to processing an e-mail. However, some differences exist because of the nature of the chat medium. [Figure 30](#) shows a typical scenario for chat processing.

1. Chat Server receives a new chat session from the Internet.
2. Interaction Server creates a new interaction of the chat type and places it in a queue, here Queue_1.
3. UCS stores control information about the interaction, such as the address of Chat Server and the chat Session ID, in the Universal Contact Server database.
4. URS takes the interaction from the queue and processes it using Routing Strategy_1.
5. The routing strategy determines which agent should handle the interaction and transfers the interaction to the agent's desktop.

The agent receives all information related to the interaction. The chat invitation supplies the Chat Server address and Session ID.

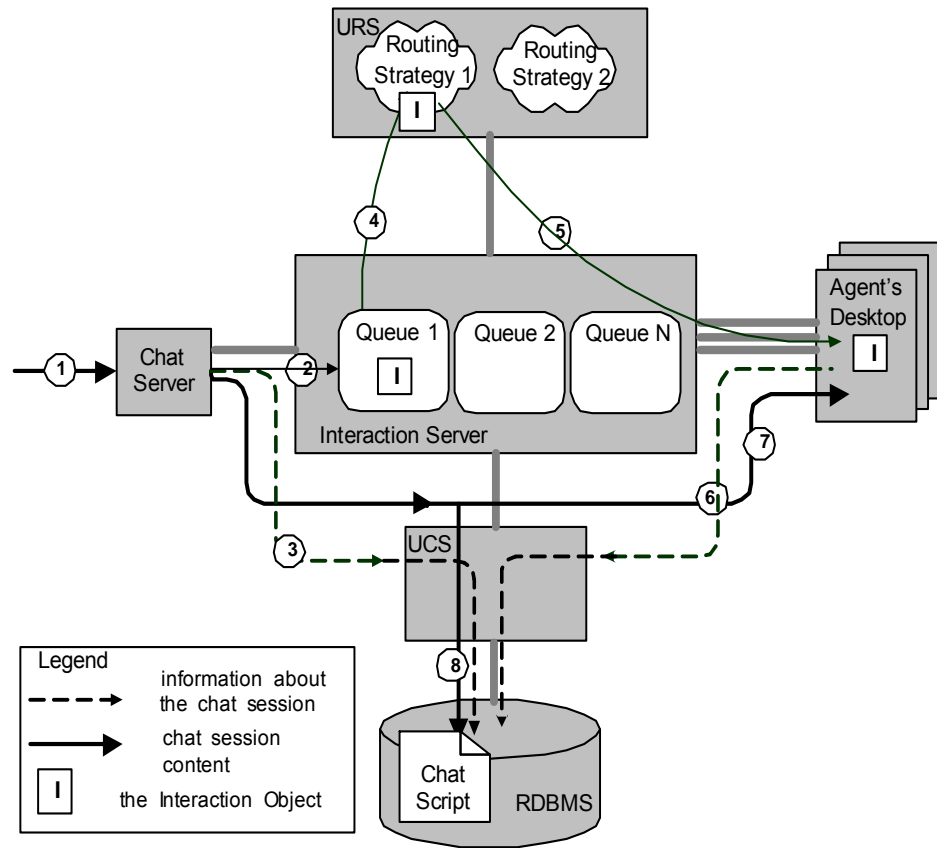


Figure 30: Processing of Chat Interactions

6. The agent accepts the interaction, and this results in the establishment of a chat session with Chat Server.
7. During the chat session, information about the dialog (the chat transcript) is stored in the Universal Contact Server database.

Structure of the Interaction Model

This section contains a more abstract view of the Genesys Multimedia interaction model. Organizing Solution Reporting on the handling of interactions in Genesys Multimedia requires a clear, well-defined understanding of multimedia interactions in their most abstract form. Like a telephony call (see “Telephony Events and Their Structure” on [page 33](#)), a multimedia interaction is built from abstract objects.

There are three major object types, each of which is discussed in the following subsections:

- **Endpoint Object**—An *endpoint object* is an abstract representation of a participant in the interaction, such as a customer or a routing strategy. This object is stateless in the context of the multimedia interaction model.

- **Interaction Object**—An *interaction object* is the abstract representation of the interaction as a whole. This object is stateless in the context of the multimedia interaction model.
- **Party Object**—A *party object* represents the processing of an interaction object by an endpoint object. Party objects are dynamic and can be represented in state machine diagrams.

Endpoint Objects

Figure 31 shows the four major endpoint object types.

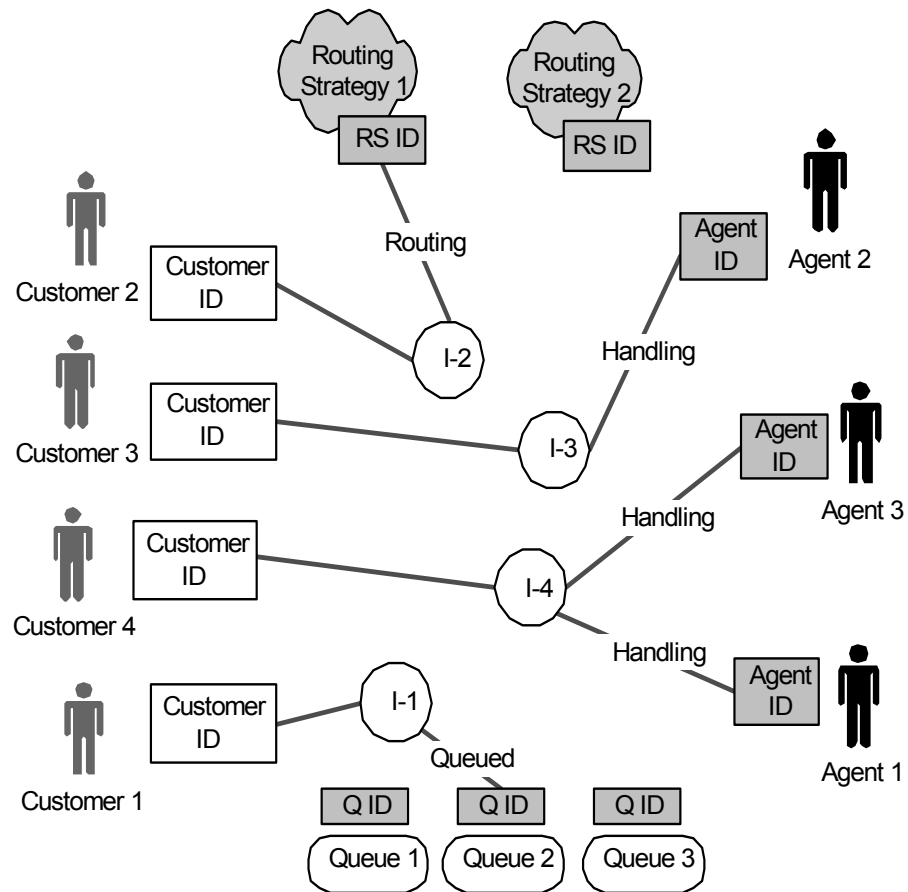


Figure 31: Multimedia Objects

The endpoint objects for interactions represent participants in the interactions. The Multimedia interaction model uses these four types of Endpoint Objects:

- **Customer**—Many interactions are strongly associated with a customer who initiated this interaction (in the case of inbound interactions) or to whom the interaction is directed (in the case of outbound interactions). A

customer is uniquely identified by a Customer ID that can be implemented as an e-mail address or a chat address. Internal interactions might have no Customer Object associated with them.

- **Queue**—Interactions might wait in a queue for processing. A queue is identified by a Queue ID that is unique in Interaction Server.
- **Routing Strategy**—A *routing strategy* is a processing object that determines the next endpoint in the processing of an interaction. Each routing strategy is identified by a unique Strategy ID.
- **Agent**—An *agent* can be viewed as a processing object that handles an interaction. Each agent is identified by a unique Agent ID.

Endpoint Objects are stateless. That is, an Endpoint Object has no state machine associated with it.

The Interaction Object

In addition to the objects described above, an interaction uses an Interaction Object, which associates the endpoints (that is, the participants) involved in handling the interaction. The Interaction Object is also stateless. Each interaction is identified by a unique Interaction ID.

The Party Object

A Party Object is an object that represents involvement of an Endpoint Object with an Interaction Object. That is, the Party Object connects the Endpoint Object and the Interaction Object. Party Objects that connect Customer and Interaction Objects represent only the association between the interaction and the customer. Therefore, they are stateless. Party Objects that connect the other Endpoint Objects can be in different states at different times and can therefore be represented by state machines. The state of a Party Object indicates the current nature of the involvement between the Endpoint Object and the Interaction Object.

[Figure 31](#) shows four situations in which an interaction might be found. The first one, I-1, is an interaction in a queue waiting for processing. The state of the corresponding Party Object is *Queued*, indicating that the Party Object connects the interaction with a Queue Object and the interaction is waiting to be processed.

Situation I-2 shows a Party Object that connects an Interaction Object to the routing strategy that is determining the next Endpoint Object to which the interaction should be sent. The state of the Party Object is *Routing*, indicating that the Router is currently handling the interaction.

Situation I-3 shows a Party Object that connects the interaction to an agent. This Party Object is in the *Handling* state. Party Objects that are connected to an agent might have other states as well, as shown in “The Party Object State Machine” on [page 55](#).

Situation 1-4 shows a Party Object that connects the interaction to multiple agents (two, in this case). This arrangement is known as a conference. The interaction has two Agent Endpoint Objects, the Party Object associated with each being in the Handling state.

The Party Object State Machine

As mentioned in the previous section, a Party Object has states that can be represented in a state machine diagram. Figure 32 shows this state machine.

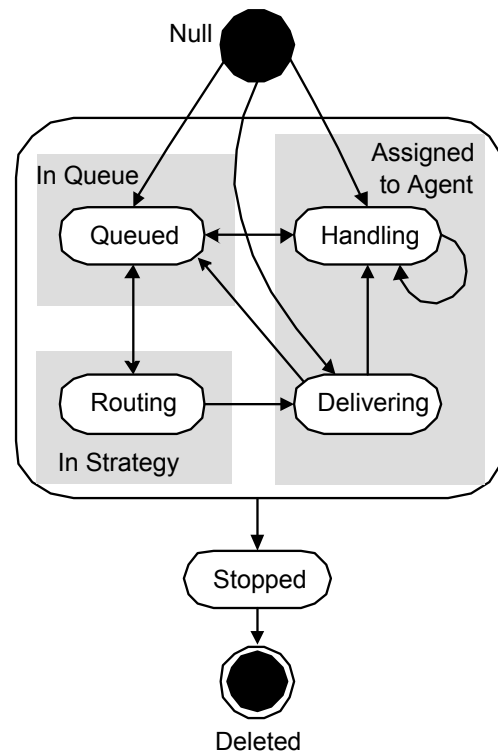


Figure 32: Party Object State Machine

This state machine contains several states and transitions between them. Interaction Server signals each transition from state to state by generating a corresponding event that is sent to Stat Server.

The progress of an interaction can be understood as the movement of the Party Object connected to the interaction from one to another Endpoint Object. As this happens, the Party Object takes on the appropriate state, as shown in the Party Object state machine. “Typical Interaction Scenarios” on [page 56](#) describes a number of interaction processing scenarios that follow the Party Object through different states.

The Null state corresponds to a case when the Party Object does not exist yet. When the Party Object is created, it starts in the Queued or the Handling state. In the first case, the interaction is placed in a queue to wait for further processing.

In the second case, the new interaction is created by an agent, such as outbound e-mail.

The Routing state indicates that a routing strategy is processing the interaction to determine the next endpoint, such as an agent or a queue.

An interaction that is connected to an agent is represented by a Party Object that is in one of two states, Delivering or Handling. If the Party Object is in the Delivering state, the interaction has been distributed to the agent but the agent has not yet accepted it for handling. If the agent accepts the interaction, the Party Object takes the Handling state. If the agent rejects the interaction (or the timeout period expires), the interaction returns to a queue.

When the Party Object is in a Queued, Routing, Delivering, or Handling state, the party can proceed to the Stopped state, which indicates that there is no more processing to be done to the interaction. After that, the Party Object takes the Deleted state that corresponds to elimination of the Party Object.

Transferring and Conferencing

A new Party Object created as a result of a transfer or conference behaves in accordance with the Party Object state machine shown in Figure 32 on [page 55](#).

- | | |
|---------------------|--|
| Transferring | This section describes how a transfer proceeds. Suppose that Agent A is handling an interaction, creating a Party Object with the Handling state. Then Agent A decides to transfer the interaction to Agent B. As a result, a new Party Object is created with Agent B as the endpoint. This corresponds a state transition from the Null state to the Delivering state. If Agent B accepts the interaction, this Party Object proceeds from the Delivering to the Handling state. At the same time, the Party Object that represents the connection between Agent A and the interaction is destroyed. |
| Conferencing | Conferencing proceeds in similar way. The difference is that the original Party Object (or Party Objects) is not destroyed when joining new the participant. Note that no participant's Party Object can be queued until it is the only remaining Party Object in the conference. |

Typical Interaction Scenarios

In this section we present a set of scenarios that illustrate typical stages of interaction processing.

Initiating an Interaction

This scenario shows what happens when someone—whether customer or, in the case of an outbound interaction, an agent—initiates an interaction (see [Figure 33](#)). When the new interaction arrives, the receiving server (E-Mail Server or Web Media Server) creates a new Interaction Object. An initial

record of the interactions is written to the Universal Contact Server database and the receiving server passes control of the interaction to Interaction Server.

The new interaction is associated with a Party Object that connects the interaction with the initiator, in this case, as is most typical, a customer. In addition, the Party Object takes the Queued state, which indicates that Interaction Server has placed the interaction in a queue.

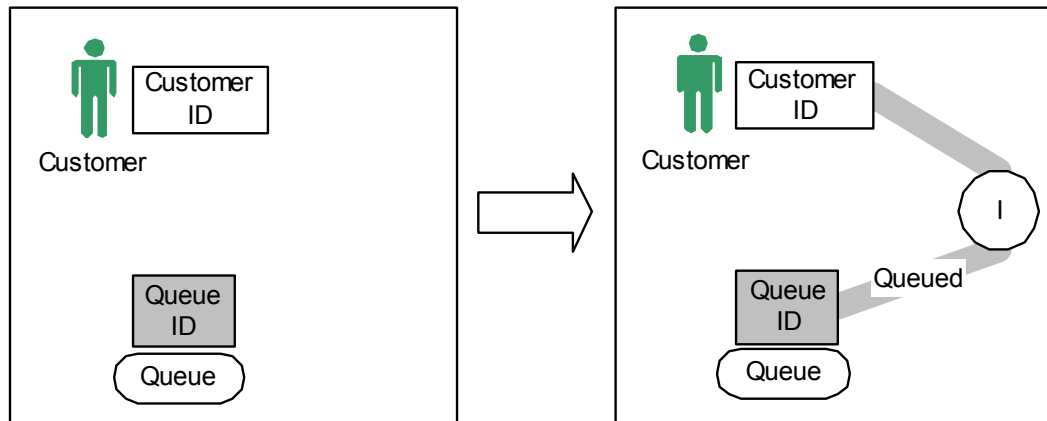


Figure 33: A Customer Initiates an Interaction

Routing of the Interaction

This scenario shows how the interaction is picked up by a routing strategy, which processes it to determine the next endpoint. See [Figure 34](#).

Note: Although it might sound as if the routing strategy removes the interaction from the queue, this is not the case. The interaction remains in queue during handling by the strategy. However, for clarity, an interaction's time in a queue and its time being processed by a routing strategy are discussed separately.

Before the routing strategy starts processing the interaction, the Party Object was in a Queued state and the interaction was in a queue, as shown in the left-hand pane of [Figure 34](#). This queue might be associated with some routing strategy that processes interactions waiting in this queue. When the Router is ready, it begins to process this interaction. The right-hand pane of [Figure 34](#) shows the Party Object in the Routing state, indicating that the interaction is being processed by the routing strategy.

Again note that, although the graphic shows the Party Object being changed from one that connects the customer to the queue to one that connects the customer to the routing strategy, the interaction is simultaneously in queue. However, the Routing state takes precedence over, and replaces, the Queued state.

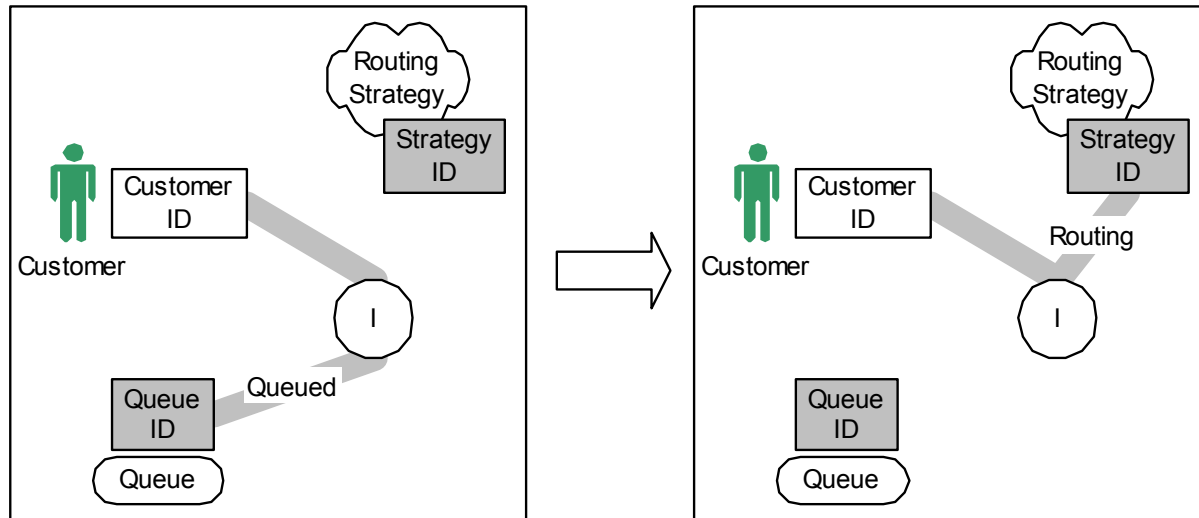


Figure 34: Routing the Interaction

The transition from the Queued state to the Routing state triggers a corresponding event, which is sent to Stat Server.

Distribution of the Interaction to an Agent

The routing strategy that processes the interaction might take any of a number of actions after completing interaction processing. One outcome is distribution of the interaction to an agent. See [Figure 35](#).

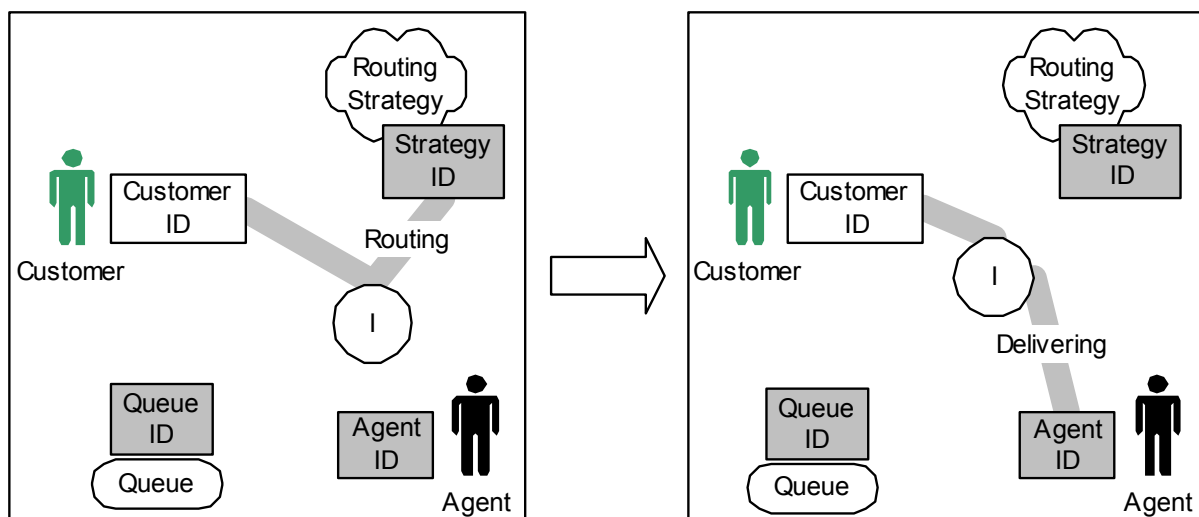


Figure 35: Distribution of the Interaction to an Agent

This results in a transition of the state of the Party Object from the Routing state to the Delivering state. This means that the interaction has been assigned to the agent.

This does not mean that the agent can now further process the interaction. To do so, the agent must first accept the interaction, which transfers the Party Object to the Handling state, as shown in the next section.

An Agent Accepts the Interaction

An agent to whom an interaction has been delivered might accept it for handling. See [Figure 36](#). In this case the party changes from the Delivering state to the Handling state.

If the agent not does not accept the interaction, he or she might send it back to the queue or a specified timeout period might elapse, which transfers the interaction back to the queue automatically.

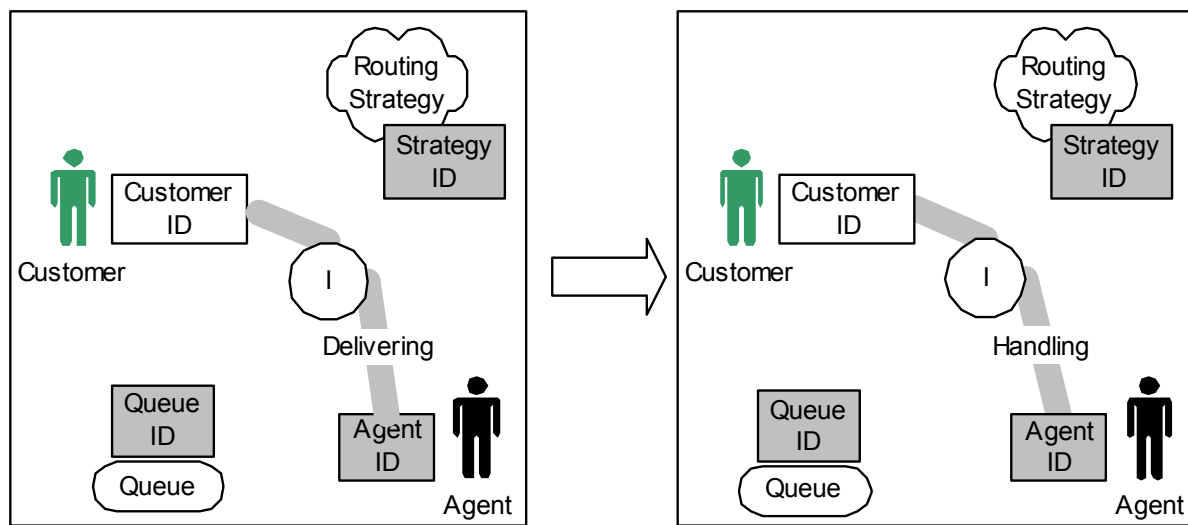


Figure 36: An Agent Accepts the Interaction

Placing Interaction into Queue by Agent

An agent handling an interaction might decide that a different agent should continue its processing. In this case, the agent returns the interaction to a queue. See [Figure 37](#).

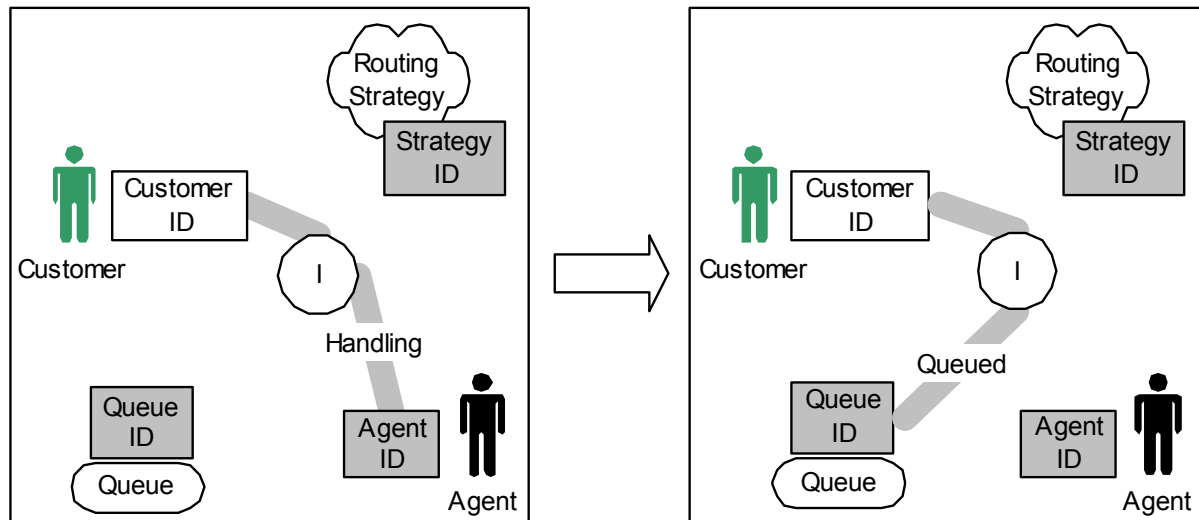


Figure 37: An Agent Placing an Interaction into a Queue

The Party Object changes state from the Handling state back to the Queued state.

Interaction Transfer: Initialization

An agent handling an interaction chooses to transfer the interaction directly to another agent without first placing it in a queue. The first stage of this interaction transfer scenario is shown in [Figure 38](#).

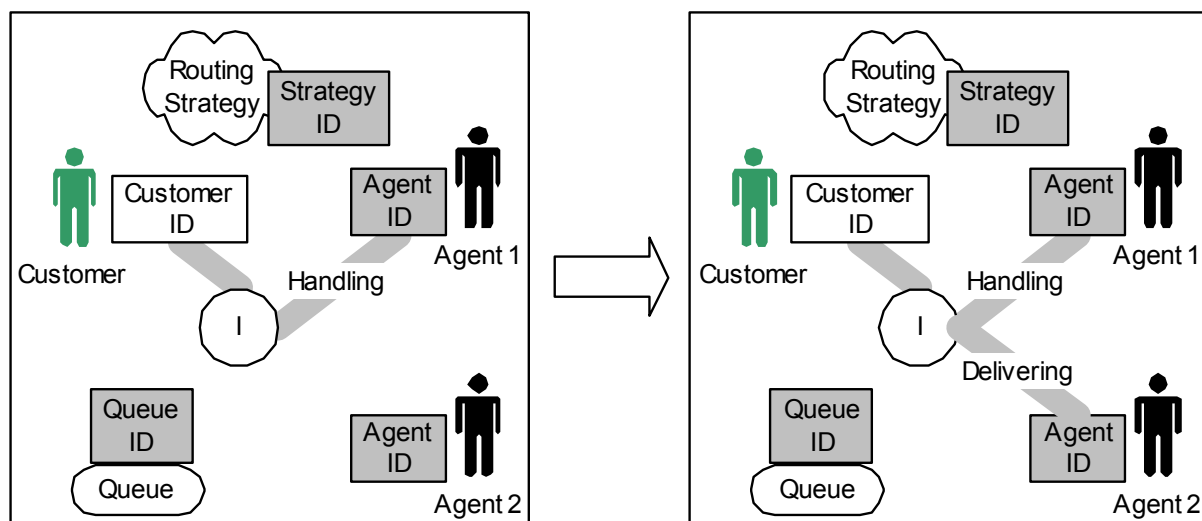


Figure 38: Transfer of an Interaction—Step One

Initiating the transfer creates a new Party Object with Agent 2 as the endpoint. The new interaction takes the Delivering state, indicating that Agent 2 must accept (or reject) the transfer to continue interaction processing. At this point, the original Party Object that connects to Agent 1 still exists and is in the Handling state.

Interaction Transfer: Acceptance

When Agent 1 has initiated the interaction transfer, there are two possible outcomes for the transfer. The normal case is when the second agent (here Agent 2) decides to accept the transferred interaction. This scenario appears in [Figure 39](#).

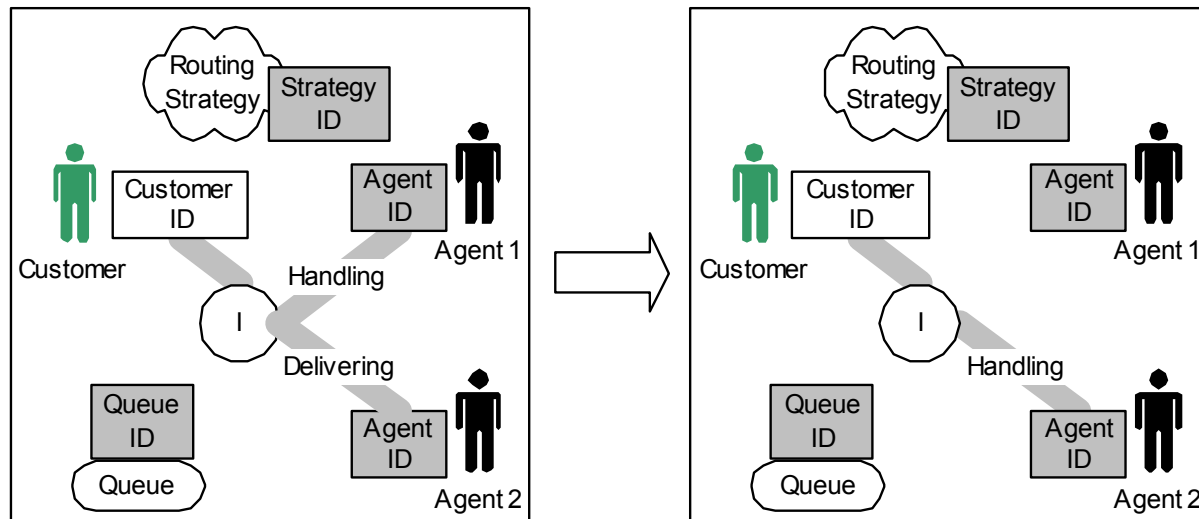


Figure 39: Interaction Transfer Accepted

After Agent 2 accepts the interaction, the Party Object connected to Agent 2 changes to the Handling state. The Party Object connected to Agent 1 is destroyed. The transfer is complete.

Interaction Transfer: Rejection

If Agent 2 does not want to participate in handling the interaction, he or she might reject it, as shown in [Figure 40](#).

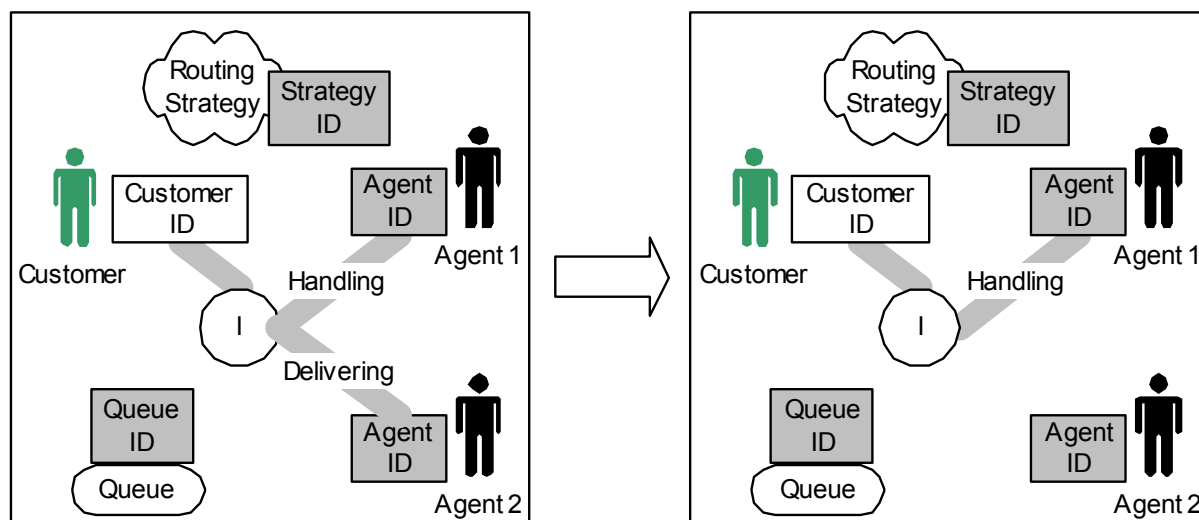


Figure 40: Interaction Transfer Rejected

In this case, the Party Object connected to Agent 2 is destroyed, while the Party Object connected to Agent 1 remains in the Handling state.

Note: An interaction transfer might be rejected automatically if a configured timeout expires before Agent 2 accepts the transfer.

Conferencing an Interaction

Some interactions, such as chat, might reasonably be handled by several agents simultaneously rather than by one. This sort of interaction processing is called conferencing (see [Figure 41](#)).

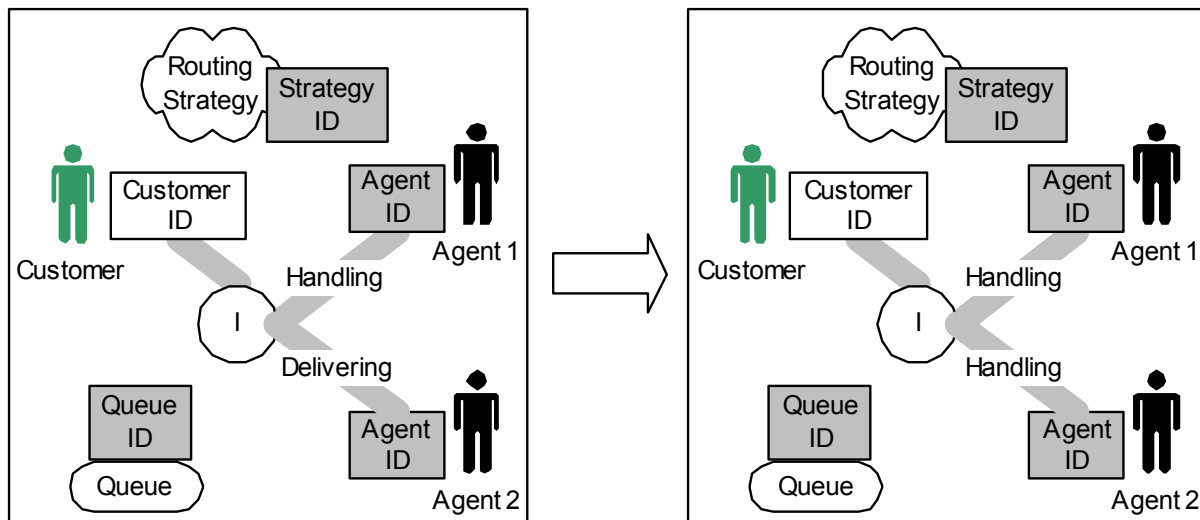


Figure 41: Conferenced Interaction

During a conference, a new Party Object is created and changes from the initial Idle state (not shown) to the Delivering state. The original Party Object remains in the Handling state and emits an event that indicates the creation of the conference. When the additional agent or agents accepts the interaction, the second Party Object enters the Handling state, as shown in the right-hand pane of [Figure 41](#). Unlike a transfer, a conference results in multiple Party Objects in the Handling state. The original Party Object is not destroyed.

Note: A conference and the resulting creation of the new Party Object might be initiated either by someone already handling the interaction or by the agent joining the conference. In either case, the conferencing procedure is the same.

Stopping the Processing of an Interaction

You can stop an interaction from being processed further in several ways. One way is for an agent to stop the processing. This scenario is shown in [Figure 42](#).

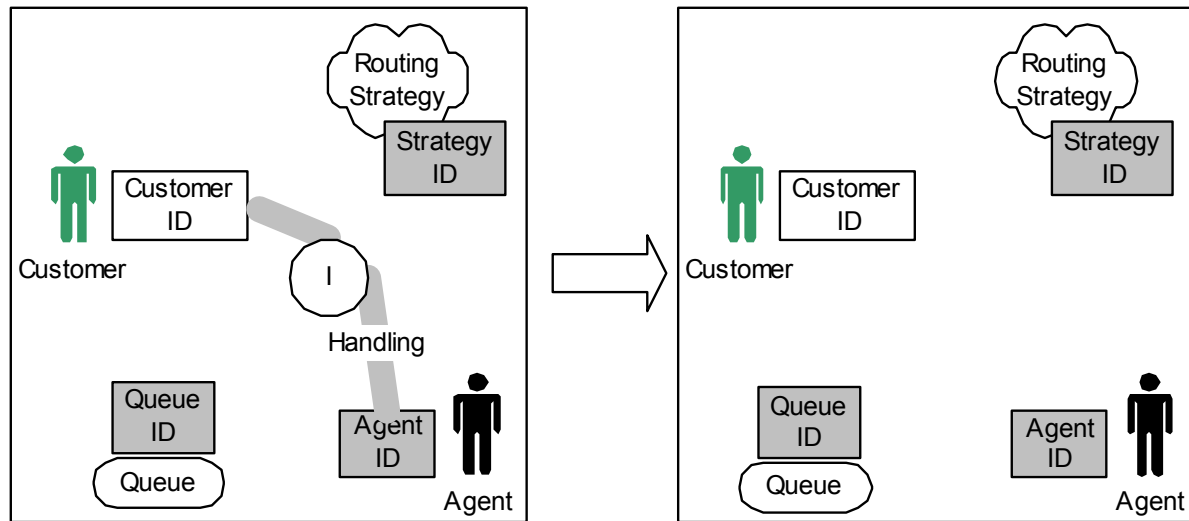


Figure 42: Stopping the Processing of an Interaction

Before the agent decided to stop the interaction, the Party Object was in the Handling state, as shown in the left-hand pane of Figure 42. Afterwards, the Party Object changes to the Stopped state and then to the Deleted state, which corresponds to the destruction of the Party Object, as shown in the right-hand pane of Figure 42.

Interaction processing might also be stopped by:

- A routing strategy, if it determines that an interaction should be sent to a Stop routing object.
- Chat Server, if the customer disconnects before the chat session has been distributed to an agent. If the chat session has been distributed to an agent, only a routing strategy or an agent can stop the interaction.

E-Mail Processing Example

This section puts together the various segments of interaction processing detailed in the preceding section to present an overview of a full sequence of steps that might be involved in processing an inbound e-mail.

Note: This is an example and might not reflect actual e-mail processing stages in your environment.

This example shows an e-mail arriving, sending of an acknowledgement, processing by an agent, and the agent sending a response back to the customer. The processing environment appears in Figure 43. The interaction waits in Queue 1 until Strategy 1 processes it. Strategy 1 sends an acknowledgement to the customer and determines the appropriate agent. Queue 2 and Strategy 2 are used to send the outbound e-mail interactions.

Figure 43 shows the initial situation, in which no interaction exists.

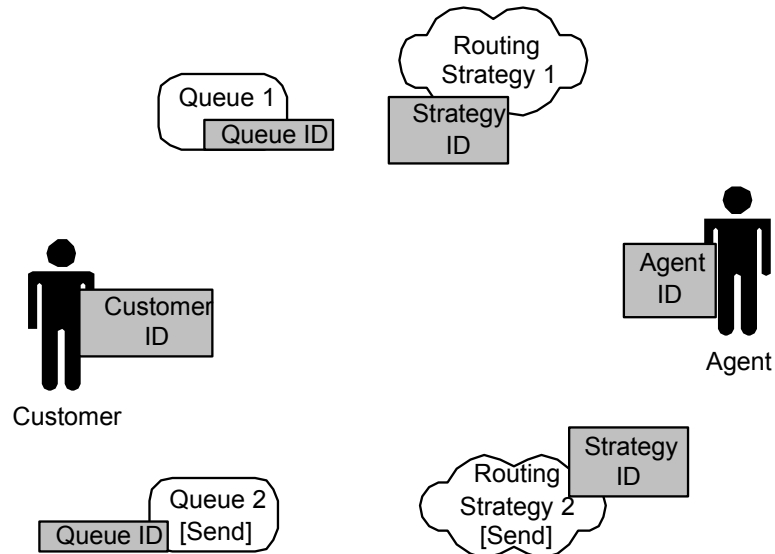


Figure 43: Initial Stage: No Interaction Exists

The customer then sends an e-mail to the contact center. An interaction of the e-mail type is created, as shown in [Figure 44](#). It is currently composed of two Party objects, one of which associates the interaction with the customer. The other one associates the interaction with Queue 1, where it waits for Strategy 1 to process it. This party is in the Queued state.

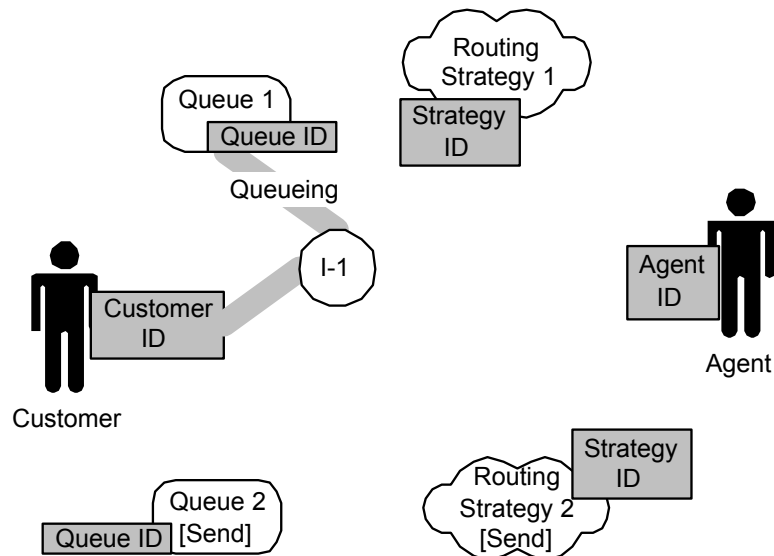


Figure 44: The New Interaction in Queue

Next, the Queued Party is transferred to Strategy 1, at which point it changes to the Routing state, as shown in [Figure 45](#). The Strategy processes the interaction, first by sending an acknowledgement that the e-mail was received and then by determining the most appropriate agent to handle the interaction.

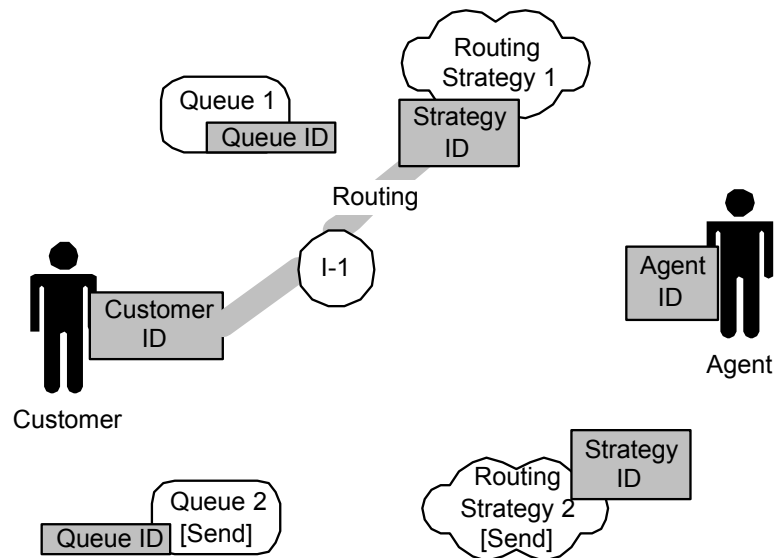


Figure 45: Routing the E-Mail

Strategy 1 initiates a new outbound interaction, I-2, for the acknowledgement. The new interaction has a Party object associated with the customer and a Party object that is associated with Queue 2 and which is in the Queued state. At this point, the interaction is waiting for Strategy 2 to process it (see [Figure 46](#)).

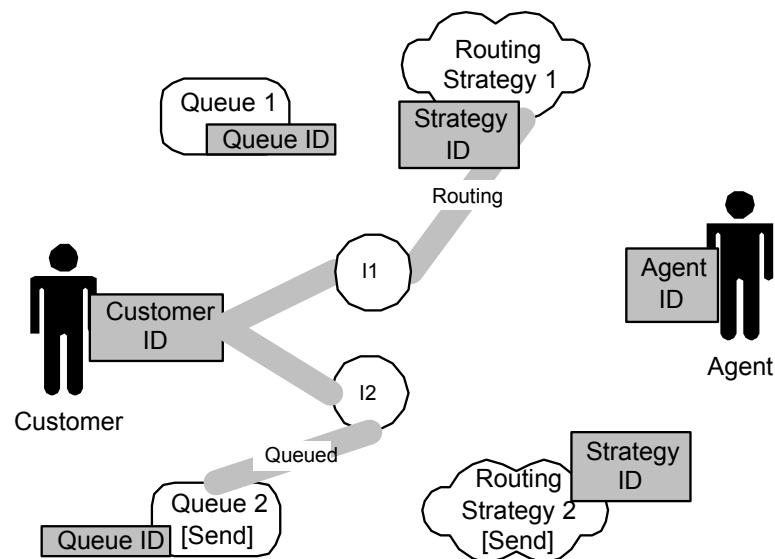


Figure 46: The Auto Response in Queue

The outbound acknowledgement interaction is processed by Strategy 2 and sent to the customer (see [Figure 47](#)). After the auto response is sent, I-2 and the associated Party Objects, disappears.

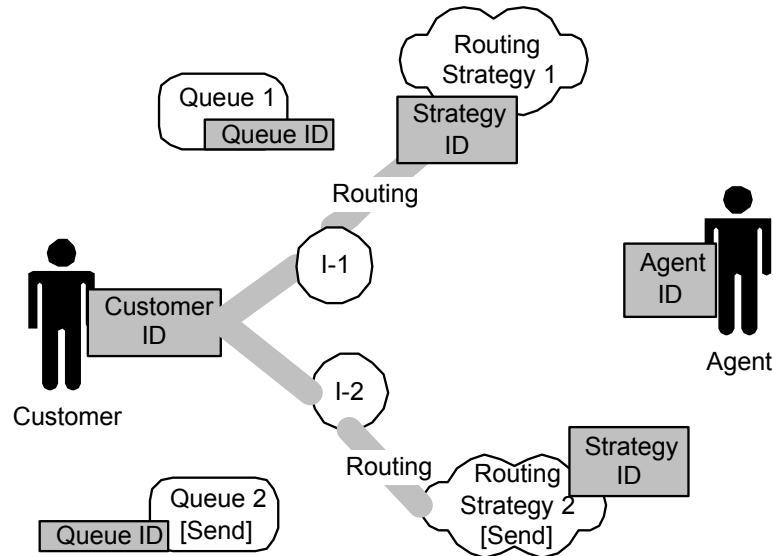


Figure 47: Strategy 2 Sends the Auto Response to the Customer

After creating the acknowledgement interaction, Routing Strategy 1 checks for an agent who can process the interaction. The interaction Party Object moves to the agent and enters the *Delivering* state. When the agent accepts the interaction the Party changes to the *Handling* state, as shown in [Figure 48](#).

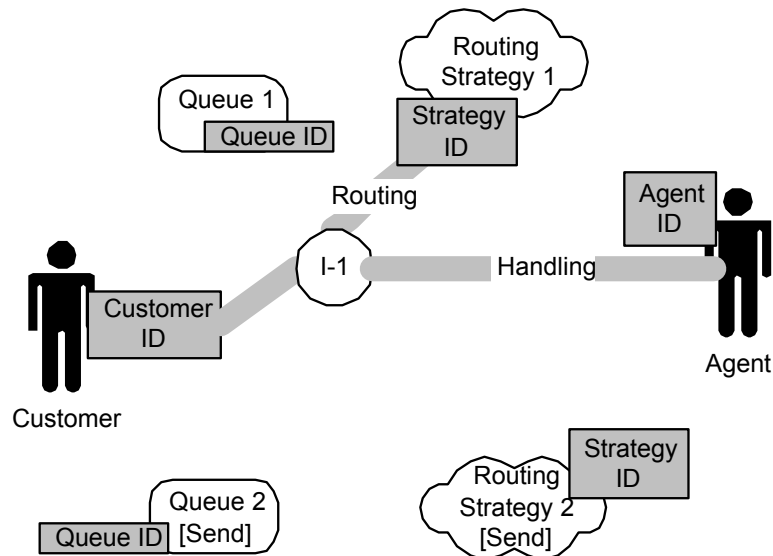


Figure 48: The Agent Accepts the Interaction

The agent handles the interaction, which includes preparation of a reply e-mail that the agent sends to the customer. The reply e-mail creates a new outbound interaction, I-3, with two Party Objects, one associated with Queue 2 and the other with the customer, as shown in [Figure 49](#).

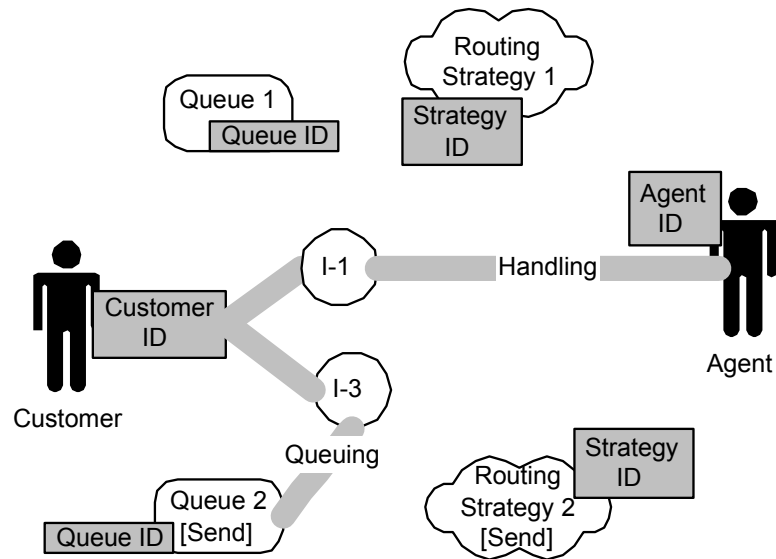


Figure 49: Interaction 3: The Reply E-Mail

In order for the reply to reach the customer, it is queued, sent to a routing strategy, and then to the customer (see [Figure 50](#)). After the interaction is sent to the customer's e-mail server, Interaction 3 disappears.

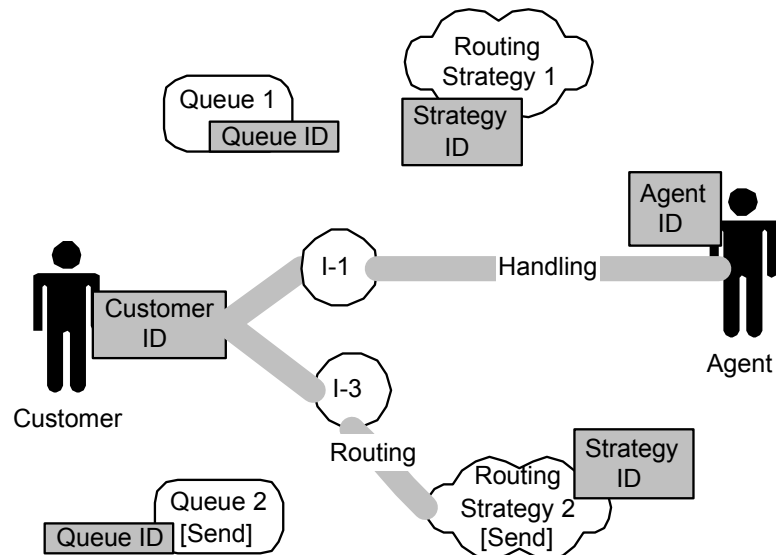


Figure 50: Routing the Reply E-Mail to the Customer

After the reply is sent, the agent stops processing Interaction 1, which then disappears as well. The situation returns to the starting point, with no interactions present, as shown in [Figure 43](#) on [page 64](#).

This example shows a typical scenario for processing inbound e-mail in terms of the Multimedia Interaction Model. Note that, in this scenario, e-mail processing involves three different interactions.

The Statistical Model

The Genesys Statistical Model embodies the main principles of Stat Server operation. This document discusses only the part of the Statistical Model relevant to Solution Reporting.

Stat Server can work with several T-Servers and/or Interaction Servers; that is, it can be the client of several T-Servers and Interaction Servers simultaneously. Stat Server is also a client of Configuration Server, from which it retrieves information about objects in a contact center. Stat Server uses Configuration Server information to maintain its own system of objects, which is derived from the object model in the Configuration Server. Stat Server processes information received from T-Server and Interaction Server to provide its clients with more elaborated and statistically useful information. [Figure 51](#) shows a typical Stat Server environment.

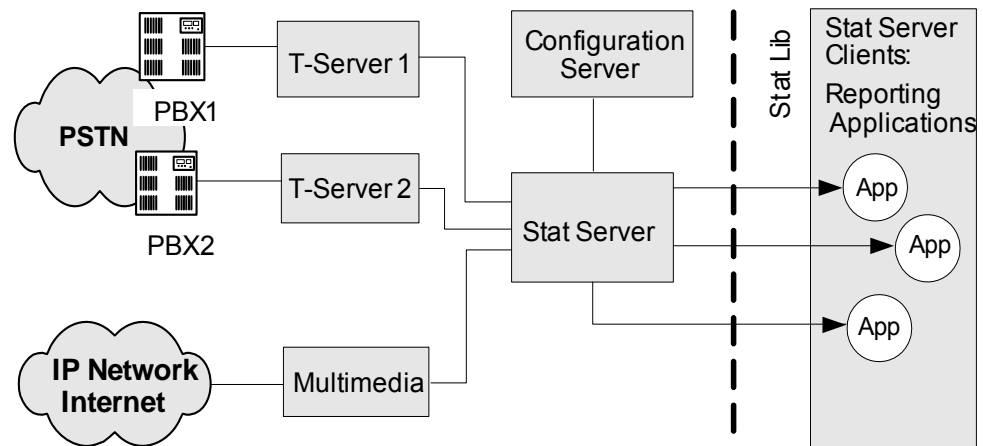


Figure 51: Stat Server Environment

To provide its clients with statistical information, Stat Server uses its internal API, the Stat Lib. This API principally supplies metrics and statistics that tell Stat Server what information clients require. Roughly speaking, the metrics specify information about what object type is needed, what data is of interest about these objects, and how to calculate information. The statistic is the application of the metric to a specific object.

Structure of a Statistic

To receive statistical information from Stat Server, its clients must specify what kind of information they need. This specification consists of a request for statistics retrieval from the Stat Server API. Stat Server collects the statistical values and sends them to the client only when requested.

The structure of the components of a statistic is shown in [Figure 52](#).

Within the Genesys Statistical Model, a *statistic* is defined as a metric applied to a specific object in a contact center. A *metric* is comprised of a statistical

type, time profile, time range, and filter. (The latter two are optional.) A *statistical type* is a collection of masks, object types, category, and subject.

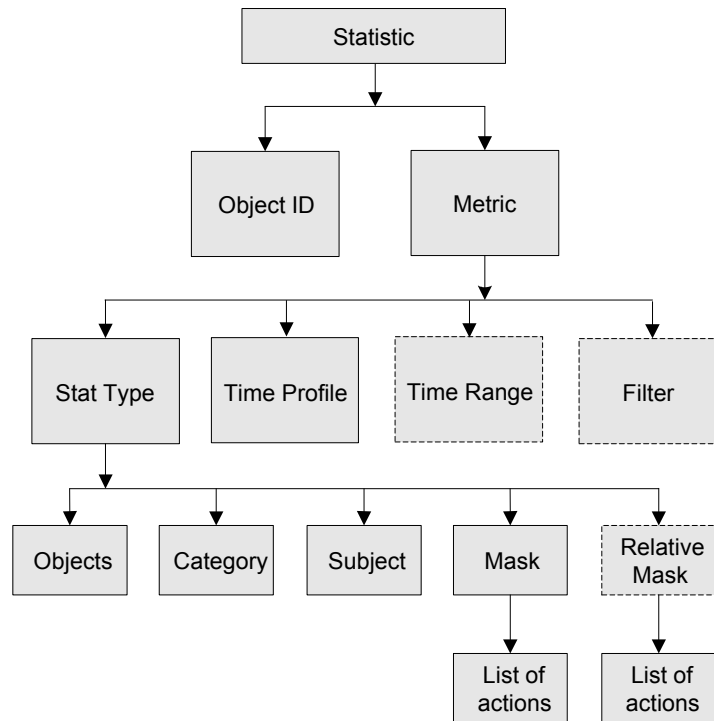


Figure 52: Structure of Request for Statistical Information

Statistical Objects

Stat Server provides applications with information about the following contact center objects:

- **Regular Directory Numbers (RegDN).** Represents regular devices in the contact center (T-Server) identified by a directory number (DN).
- **Agent.** Represents a living person (operator) registered (logged in) in a contact center as an agent.
- **Place.** Represents the agent's working place and is usually composed as a set of regular DNs.
- **Queue.** Represents an ACD queue, interaction queue, or workbin of interactions waiting for distribution. The functionality of a queue is usually implemented within PBX hardware that T-Server can access.
- **Routing Point (RoutePoint).** Represents a Routing Point device, which is a DN that can route calls to other DNs. Routing Point functionality is implemented within T-Server software.
- **Group of Agents (GroupAgents).** Represents a group of agents, usually grouped on the basis of established business rules, for example, the Sales and Help Desk groups.

- **Group of Places (GroupPlaces).** Represents a group of places, usually formed for administrative or geographical purposes.
- **Group of Queues (GroupQueues).** Represents a group composed of Queue and/or Routing Point objects.
- **Staging Area.** Represents an interaction queue in which multimedia interactions exist while they are being processed.
- **Tenant.** Represents an entire contact center. Used in the Genesys Multimedia e-mail and chat statistics.

Stat Server gets all its information about these objects from the Configuration Server. Refer to the *Framework Deployment Guide* and *Framework Configuration Manager Help* for further information.

Statistical Actions and Statuses

The notion of an action is fundamental to the Genesys Statistical Model. Actions are the building blocks for constructing metrics and ultimately for calculating statistical data. Stat Server actions function much like T-Server events (TEvents). Despite their elementary nature, actions are built on and could be strictly defined in terms of the Genesys Call Model. However, for the Statistical Model, actions are elementary notions.

Actions are associated with objects of device type: regular DN, Routing Point DN, and queue DN. An action on such an object tells what is going on with the object or activity on the object. More exactly, actions are related to parties associated with a particular object. For example, the transition of a party on a regular DN from a Ringing state to an Established state originates the Answered action for the agent logged in at the corresponding DN.

A set of rules prescribes how actions on objects of a lower level of hierarchy are propagated and aggregated to a higher level.

Actions are either *instantaneous* or *durable*. (For a more detailed classification, see “Action Classification” on [page 71](#).) An action might last on an object (if it is durable) or occur (if it is instantaneous). Several actions might affect an object simultaneously. For example, the CallOnHold durable action on a regular DN indicates that this DN is on hold. At the same time though, the Monitored durable action reveals that this DN is monitored.

Making sense of any Statistical Model metric requires an understanding of how all actions used in that statistic’s computation are generated. All actions are generated on the basis of TEvents or Interaction Server events. Each instantaneous action is triggered by one event while a durable action is triggered by two.

The current version of Stat Server predefines the set of all actions, which cannot be extended.

Note: The following discussion of actions, although it is based on the telephony call model, applies to multimedia actions as well unless otherwise specified. The Multimedia Interaction Model of Genesys Multimedia uses a separate set of actions, some of which are parallel to telephony actions, other of which are unique to multimedia. For a discussion of multimedia actions, refer to the *Framework Stat Server User's Guide*.

Action Classification

All Stat Server actions can be divided into two groups: durable actions and instantaneous actions as depicted in [Figure 53](#). It is convenient to associate durable actions with the state of a state machine having a starting and ending moment and lasting some duration. Therefore, a durable action can be associated with its duration time.

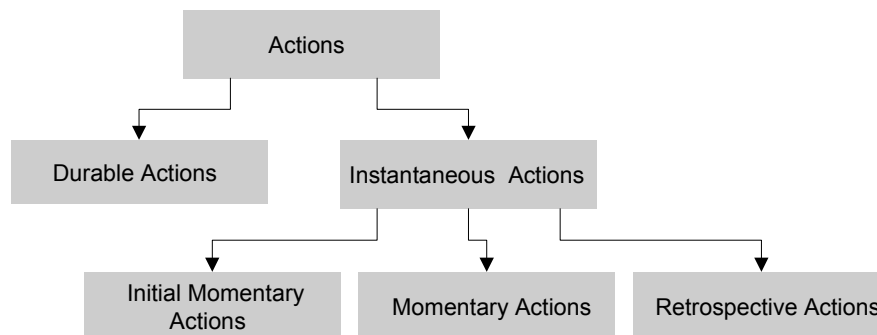


Figure 53: Types of Actions

Instantaneous actions can be naturally associated with the transition of a state machine corresponding to transition from one state to another. Therefore, these actions are indivisible and occur at a single moment of time. Instantaneous actions, in turn, can be further divided into initial momentary actions, momentary actions, and retrospective actions. [Figure 54](#) illustrates the interrelationship between action types.

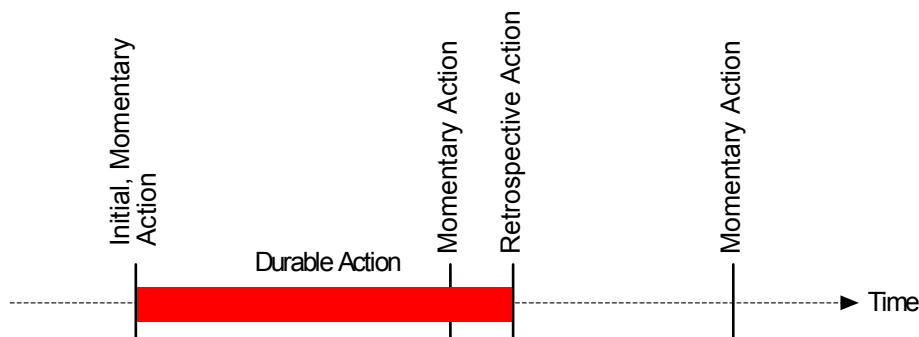


Figure 54: Interrelationship Between Actions

The durable action is depicted as the bold horizontal bar along the timeline clearly showing a duration in time. The onset of a durable action is an initial, momentary action, which is instantaneous and has a duration equal to zero. A retrospective action terminates the durable action. Despite the fact that retrospective actions, too, are instantaneous in nature, Stat Server assigns to them the duration of their corresponding durable action. Momentary actions have no relation to durable actions and endure only for the moment (duration equals zero).

Figure 55 illustrates the relationship between several Stat Server actions. This simplified example shows a sequence of actions related to a regular DN. In layperson's terms, a phone rings; an agent answers the phone and places the call on hold; the agent then releases the call from hold.

The initial momentary action, `CallIRingingStarted`, causes the start of the `CallIRinging` durable action. The `CallIRinging` action ends normally (for example, the phone is answered) as signaled by the `CallIAnswered` retrospective action. At the same time, the `CallIInboundStarted` momentary action occurs marking the beginning of the `CallIInbound` durable action. During this action, the call might be placed on hold, triggered by the `CallIHeld` initial, momentary action that marks the start of the `CallIOnHold` durable action. Now, two durable actions, `CallIInbound` and `CallIOnHold`, coexist. When the `CallIOnHold` action terminates, the `CallIRetrievedFromHold` retrospective action occurs. At any time, a `UserEvent` momentary action can occur without influencing any of the durable actions.

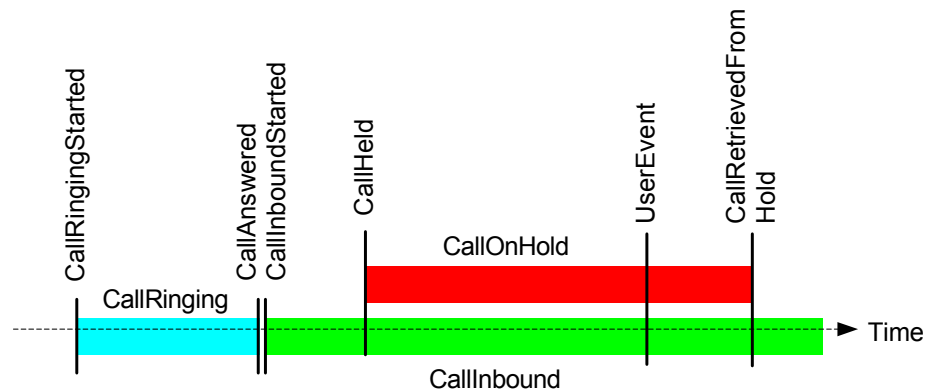


Figure 55: Example of Actions

Note that not every durable action is triggered by momentary initial and retrospective actions. For example, the two complementary actions, `Monitored` and `NotMonitored`, fall into this category.

Interrelationships Among Multimedia Actions

Multimedia actions function similarly to telephony actions. For example, a customer might initiate a chat session that is routed to an agent. The agent requests coaching and then, when the customer issue has been resolved, the agent stops the session. This interaction produces this sequence of actions:

The initial momentary action, `InteractionDeliveringStarted`, coincides with the start of the `InteractionDelivering` durable action. The `InteractionDelivering` action ends normally (for example, the agent accepts the interaction) as signaled by the `InteractionAccepted` retrospective action. At the same time, the `InteractionHandlingStarted` momentary action occurs marking the beginning of the `InteractionHandling` durable action. During this action, the agent might decide to conference in another agent. This triggers the `InteractionConferenceMade` instantaneous momentary action, followed by the `InteractionDeliveringStarted` initial, momentary action, which marks the start of the `InteractionDelivering` durable action. This `InteractionDelivering` action applies to a `Party Object` associating the current `Interaction Object` with a new agent. The `Party Object` associating the `Interaction Object` with the first agent continues to exist in the `Handling` state. When the second agent accepts the conference, it is marked first by the `InteractionAccepted` retrospective action, which ends the `Delivering` state, then by the `InteractionConferenceJoined` instantaneous momentary action, followed by the `InteractionHandlingStarted` initial, momentary action, which marks the start of the `InteractionHandling` durable action for the new `Party Object`. Now the interaction has two coexisting instances of the `InteractionHandling` durable actions. When the conference terminates, the `InteractionStopped` retrospective action occurs for the agent that has left the conference. When the chat session is complete, the remaining agent triggers the `InteractionStopped` retrospective action, ending the chat session.

Relation of Actions to Events

Occurrences of instantaneous and durable actions in the Statistical Model are triggered by events T-Server or Interaction Server sends. To understand what the action really means, it is useful to see a correlation between receiving events and the occurrence of actions.

Note: Multimedia interaction actions and events can be analyzed in an analogous way to the telephony event/action relationship described in the following sections.

Figure 56 shows an example of a `CallRinging` durable action and related instantaneous actions influenced by TEvents. As before, this is diagrammed using a state machine.

This state machine describes all actions related to ringing. The `CallRinging` durable action is represented by state **s1**. This action follows the `CallRingingStarted` initial momentary action to the left, which, in turn, is triggered upon receiving the `EventRinging TEvent` (or `EventPartyChanged TEvent` for a consulting call).

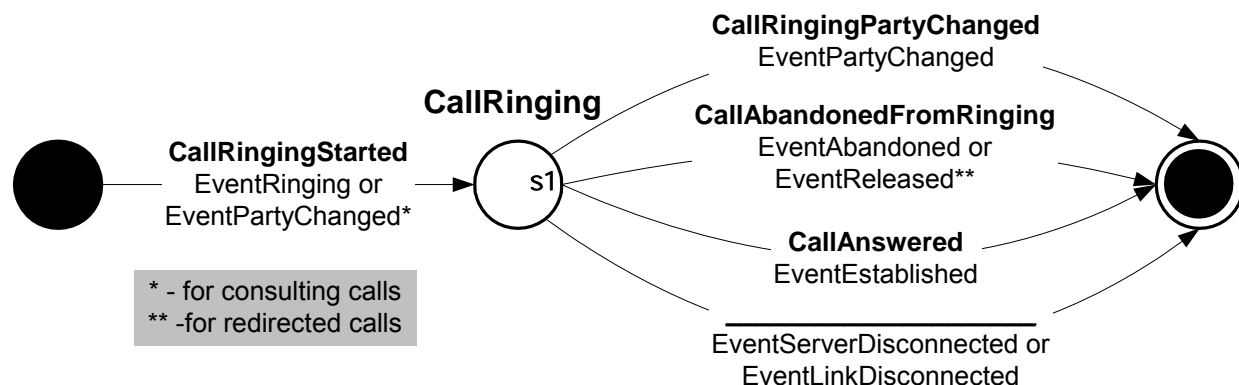


Figure 56: CallRinging Action

The **CallRinging** durable action endures until one of three instantaneous actions occurs: **CallAnswered**, **CallAbandonedFromRinging**, or **CallRingingPartyChanged**, which correspond to the three of the four possible state transitions to the right of **s1**. The fourth state transition indicates some kind system failure that forced a disconnect. These actions report about the possible end of the **CallRinging** action.

The **CallAnswered** action relates to answering the call and is triggered by the **EventEstablished** TEvent. The **CallAbandonedFromRinging** action indicates an abnormal end where the call was released before being answered (triggered by **EventAbandoned**) or as a result of redirection (triggered by **EventReleased**). Another exit from the **CallRinging** action, **CallRingingPartyChanged**, might be triggered by the **EventPartyChanged** TEvent and tells about completing a transfer of the call.

Note: Upon detecting a stuck call, T-Server distributes an **EventAbandoned** or **EventReleased** event coupled with a **AttributeReliability** attribute other than **TReliabilityOk**.

Stat Server distinguishes stuck calls, which are caused by a missynchronization between two or more interdependent contact center components (such as T-Server and the switch, Stat Server and T-Server, the Genesys Router and Stat Server), from those calls that are abandoned for other reasons (the customer hanging up, for example).

All of these instantaneous actions are retrospective actions.

The **CallRinging** durable action might also terminate when the **NotMonitored** action starts triggered either by the **EventServerDisconnected** or **EventLinkDisconnected** T-Events. These events indicate disconnection with T-Server or the breaking of the CTI link, respectively. Note that in this case there are no corresponding retrospective actions.

Comparison of Call Model and Statistical Model

Now compare the state machine in Figure 56 with the state machine for a Regular Party in Figure 19 on page 40. In Figure 57, the fragment of the state machine relating to the Ringing state is reproduced.

Note that from the Call Model point of view, there is only one way to enter the Ringing state, that is via the EventRinging TEvent, and but three ways to exit (via EventEstablished, EventReleased, and EventAbandoned transitions). The EventPartyChanged TEvent does not change the Ringing state but can change the Call object of the party. The Statistical Model interprets this situation slightly differently.

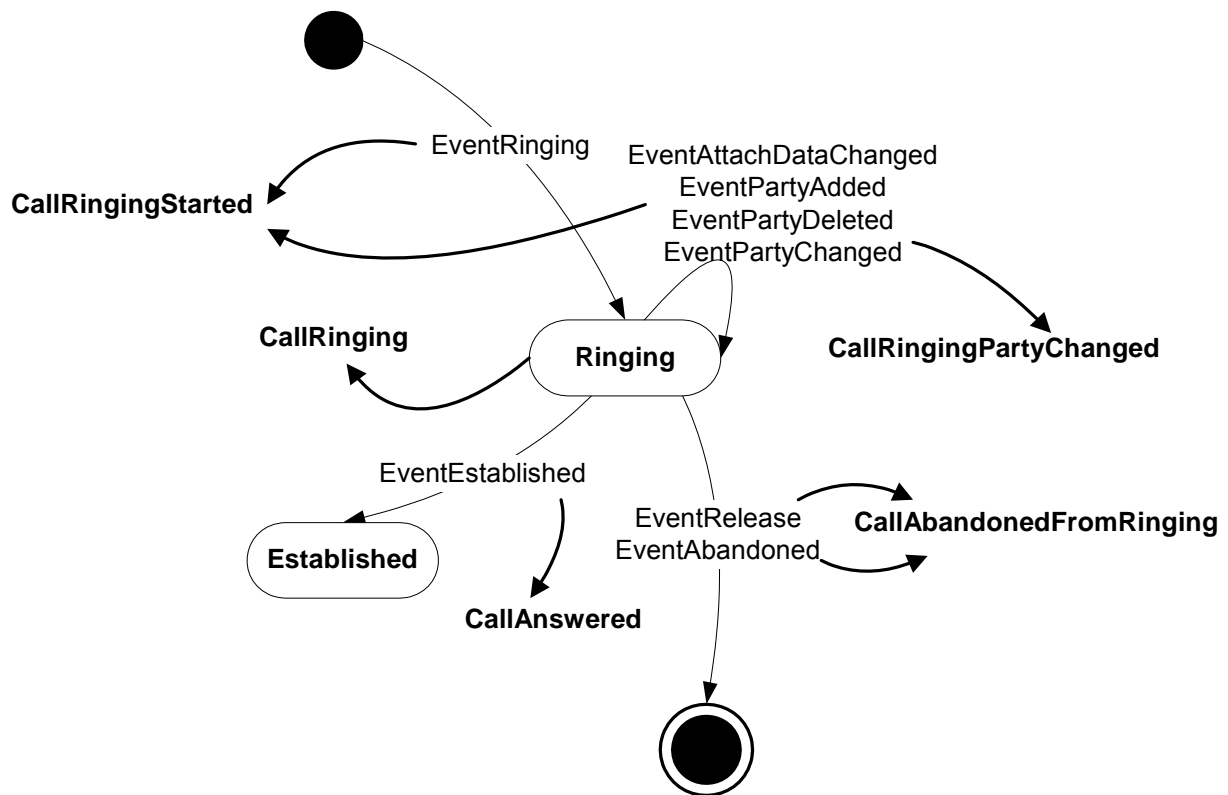


Figure 57: Fragment of Call Model State Machine

First, the EventPartyChanged T-Event with changed ConnID is treated as the end of one CallRinging durable action and the start of a new one. Second, the EventPartyChanged and EventRinging T-Events cause one initial momentary action: CallRingingStarted. Third, there might be three possible ends of the CallRinging action: retrospective action CallAnswered triggered by EventEstablished, CallAbandonedFromRinging triggered by EventRelease or EventAbandoned, and CallRingingPartyChanged triggered by EventPartyChanged.

The momentary action is illustrated by the state machine depicted in Figure 58. This machine has one state and one transition. The transition corresponds to a UserEvent momentary action and is triggered by the EventUserEvent TEvent. The transition can trigger at any time and does not change.

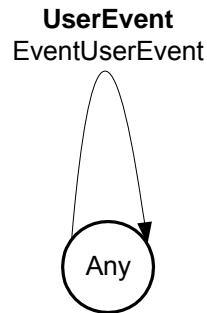


Figure 58: Momentary Action UserEvent

Action Generation and Propagation

The generation of actions starts when Stat Server receives events from T-Server and Interaction Server. [Figure 59](#) illustrates the schema of action generation. Each T-Server event is identified by its DN (event parameter Thi sDN). Therefore, it initially causes occurrence of DN action(s) according to action definition. Simultaneously, the status of each DN object is determined. Interaction Server events are identified by the InteractionID parameter. The actions generated, such as InteractionDelivering, are related to the interaction.

Actions might propagate to other objects associated with this DN where they contribute to determining statuses of these objects. (The determining procedure will be explained later.)

For example, receiving an EventRinging TEvent for a regular DN with an inbound call type invokes:

- Initial, momentary actions—CallRingingStarted and CallRingingStarted Inbound.
- Durable actions—CallRinging and CallRingingInbound.

DN status changes to CallRinging, and at the same time, these actions propagate to the corresponding Place, Agent, and Group objects where the CallRinging status is assigned to each.

This propagation also true of multimedia interactions. In the multimedia equivalent to the preceding example, the Place, Agent, and/or Group objects would take on the InteractionDelivering status.

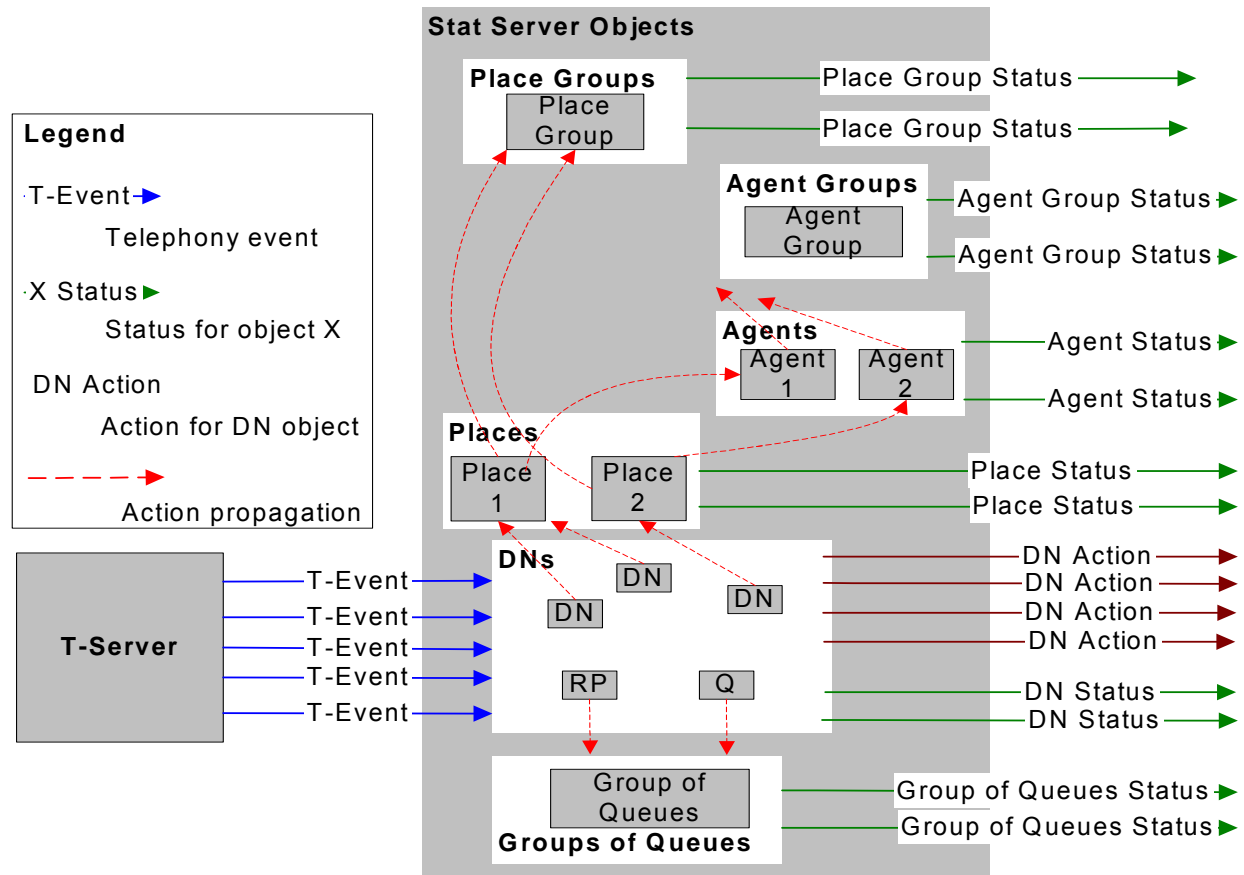


Figure 59: Action Propagation Among Objects

Telephony Actions and Events

The Statistical Model telephony actions are comprised of attributes generated on the basis of underlying TEvents. These attributes are described in [Table 2](#).

Table 2: Stat Server Action Attributes

| Attributes | Description |
|------------|--|
| ANI | The Automatic Number Identification indicating all or part of the caller's telephone number. For durable actions, this attribute is inherited from the first TEvent and does not change during the action's life. For instantaneous actions, ANI directly transfers from the corresponding TEvent. |
| DNIS | The Dialed Number Identification Service indicating all or part of the telephone number that was dialed to make a call. For durable actions, this attribute is inherited from the first TEvent and does not change during the action's life. For instantaneous actions, DNIS directly transfers from the corresponding TEvent. |
| CustomerID | The attribute indicating the tenant ID in a multitenant environment. |

Table 2: Stat Server Action Attributes (Continued)

| Attributes | Description |
|------------|---|
| MediaType | The attribute indicating the kind of environment through which the interaction is distributed. The predefined media types include voice, e-mail, and chat. |
| ThisQueue | The number of the queue. |
| Treatment | The type of the treatment applied to a call, such as silence, music, busy, and so forth. |
| UserData | Calculated on the basis of attached data to TEvents. For instantaneous actions, UserData is directly inherited from its corresponding TEvent. For durable actions, this attribute might vary. This attribute is initially set based on the first triggering TEvent. If triggered during an action, other TEvents with attached data can arrive to update this attribute. For instance, receiving an EventAttachedDataChanged TEvent updates this attribute. A final update is made following the ending TEvent. UserData uses TKV-List format with a list of TKV pairs. |
| Extensions | Enables Stat Server to filter switch-specific and other features on any specified key-value pair recorded in the AttributeExtensions attribute of select TEvents. |
| Reasons | Refers to additional data that is included in the TEvent to provide reasons for and results of actions taken by an agent. |

Statistical Model Telephony Actions

The current version of Stat Server offers a large set of actions, which are described in the *Framework Stat Server User's Guide*.

Actions can be separated into two groups:

- Interaction-related actions, reflecting events arising from particular interactions, such as TEvents that carry a ConnID or multimedia events that carry an IxnID.
- Non-interaction-related actions, caused by events not stemming from any particular interaction.

Note that Stat Server remembers the connection or interaction ID of an interaction because this ID provides the criterion for distinguishing between actions. More than one interaction-related action of the same kind can occur simultaneously at the same DN.

Telephony Object Statuses

Stat Server defines a special sort of durable action to characterize an object's status. Contrary to actions, objects can hold only one status at any point in time. Object statuses cannot overlap.

At any moment, object status is determined based on its ongoing durable actions and ranking in the Status Priority tables. The Status Priority tables list durable actions in order of priority. For example, the Regular DN Status Priority table (for instance, a priority table for Regular DN object) looks as follows:

```
NotMonitored<Monitored<OnHook<WaitForNextCall<OffHook
<CallDialing<CallRinging<NotReadyForNextCall<AfterCallWork
<CallOnHold<CallUnknown<CallConsult<CallInternal
<CallOutbound<CallInbound<ASM_Engaged<ASM_Outbound
```

Note: The Regular DN Status Priority table is the default priority table. Your system administrator might modify the table; see the *Framework Stat Server User's Guide* for details.

Here, actions are listed in order of increasing priority. For example, the CallInbound action has higher priority than the OffHook action.

The status of a Regular DN object is determined by its highest-priority, ongoing durable action (illustrated in Figure 60). It shows an action flow for a Regular DN object. The object participates in several actions simultaneously, which are graphically depicted in the top four bars. The fifth bar shows the object's status and how it changes over time. Clearly, Status Priority tables are necessary tools.

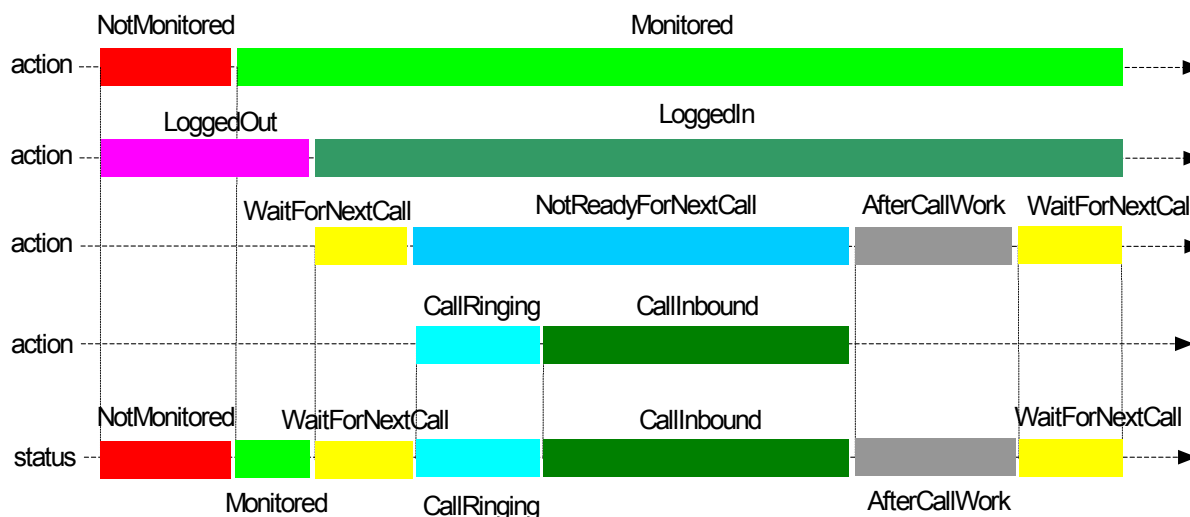


Figure 60: Actions and Status for Regular DN Object

Durable actions that do not appear in the Status Priority table have no effect on an object's status. For example, the LoggedIn and LoggedOut actions in Figure 60 do not affect the status of the Regular DN object.

Notice also that the duration of an action and its status need not coincide. In the figure above, the Monitored action and the Monitored status have different durations.

The Status Priority table for a Mediation DN object is simpler and could be written as follows:

NotMonitored < Monitored < CallWait

Figure 61 illustrates how the status of a Mediation DN object is determined.

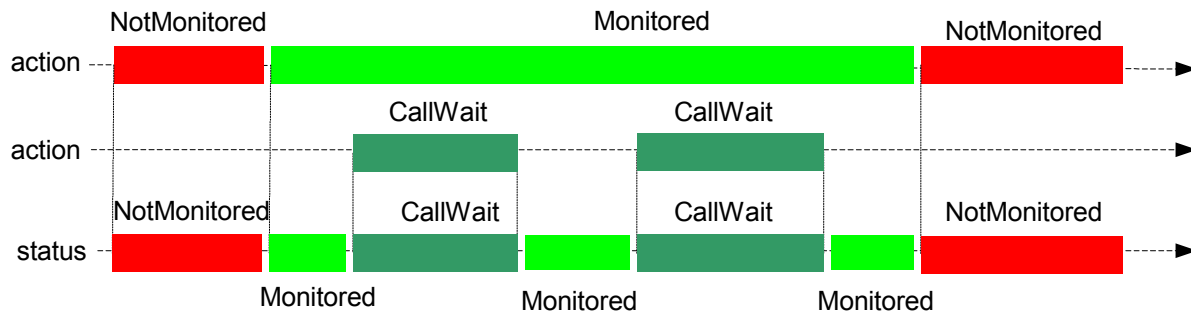


Figure 61: Actions and Status for a Mediation DN Object

The statuses of a Place object and related Agent objects are determined from the status of the DN associated with the place. If a Place object has only one DN, then its status assumes that DN's status. If the Place object is associated with several DNs, then status is determined by the Regular DN Status Priority table. For example, if the Place object has two DNs, and one is in WaitForNextCall status, the other in CallInbound status, then the place assumes the CallInbound status, which ranks higher in the Status Priority table than WaitForNextCall. The statuses of agents registered to that place are the same.

The statuses of place groups and agent groups are determined in a simpler and more intuitive manner. A place group can have but one of the following statuses:

- Monitored
- NotMonitored
- WaitForNextCall
- NotReadyForNextCall

A group of places is assigned the NotMonitored status if all its places have NotMonitored statuses. But if even one place reaches Monitored status, then the group is assigned the Monitored status. If at least one place reaches the WaitForNextCall status, then the group has WaitForNextCall status. If all places in the group reach NotReadyForNextCall status, then the group has NotReadyForNextCall status.

Therefore, the group is in WaitForNextCall status if it can receive a new call and it has a NotReadyForNextCall status if all of its places are busy (that is, all have NotReadyForNextCall or NotMonitored statuses).

The status of a group of agents is determined in a similar fashion based on the places where agents log in. A group of agents might have the following statuses:

- Monitored
- NotMonitored
- WaitForNextCall
- NotReadyForNextCall
- LoggedOut

If not one agent of a group is logged in to a place, then the group is said to have LoggedOut status.

Tracking Agent Status in a Multimedia Environment

Besides interaction processing, the multimedia interaction model of Genesys Multimedia tracks agent status. [Figure 62](#) shows all the conditions that affect agent status.

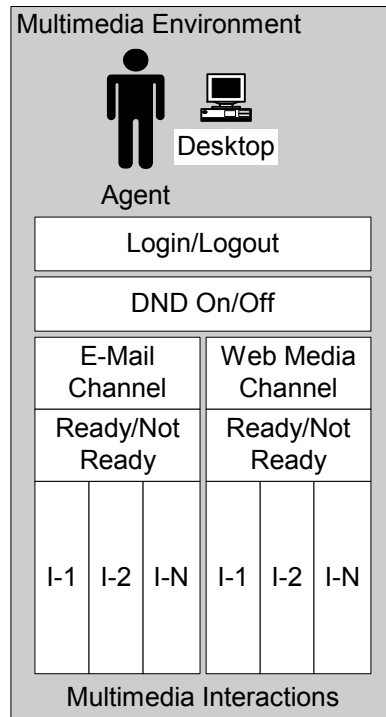


Figure 62: Agent Status Conditions

An agent might access to several media channels. [Figure 62](#) shows two channels, e-mail and web media (chat). Each channel might have several active interactions. Moreover each channel has a Ready/NotReady status indicating whether the agent can accept more interactions for this channel.

Besides the media channels and their conditions, agent status is characterized by Login/Logout and Do Not Disturb On/Off states.

Agent Status State Machine

The state machine representing agent status is presented in [Figure 63](#). It includes four controlling factors, Login/Logout, Add/Remove Media Channel, Channel Ready/Not Ready, Do Not Disturb On/Off, and depicts their interrelationships.

This state machine shows only two media types e-mail and web media (chat). However, you can construct a similar machine for other sets of media types.

This state machine represents the behavior of a monitored agent. This means that transitions from state to state are triggered by events received from Interaction Server.

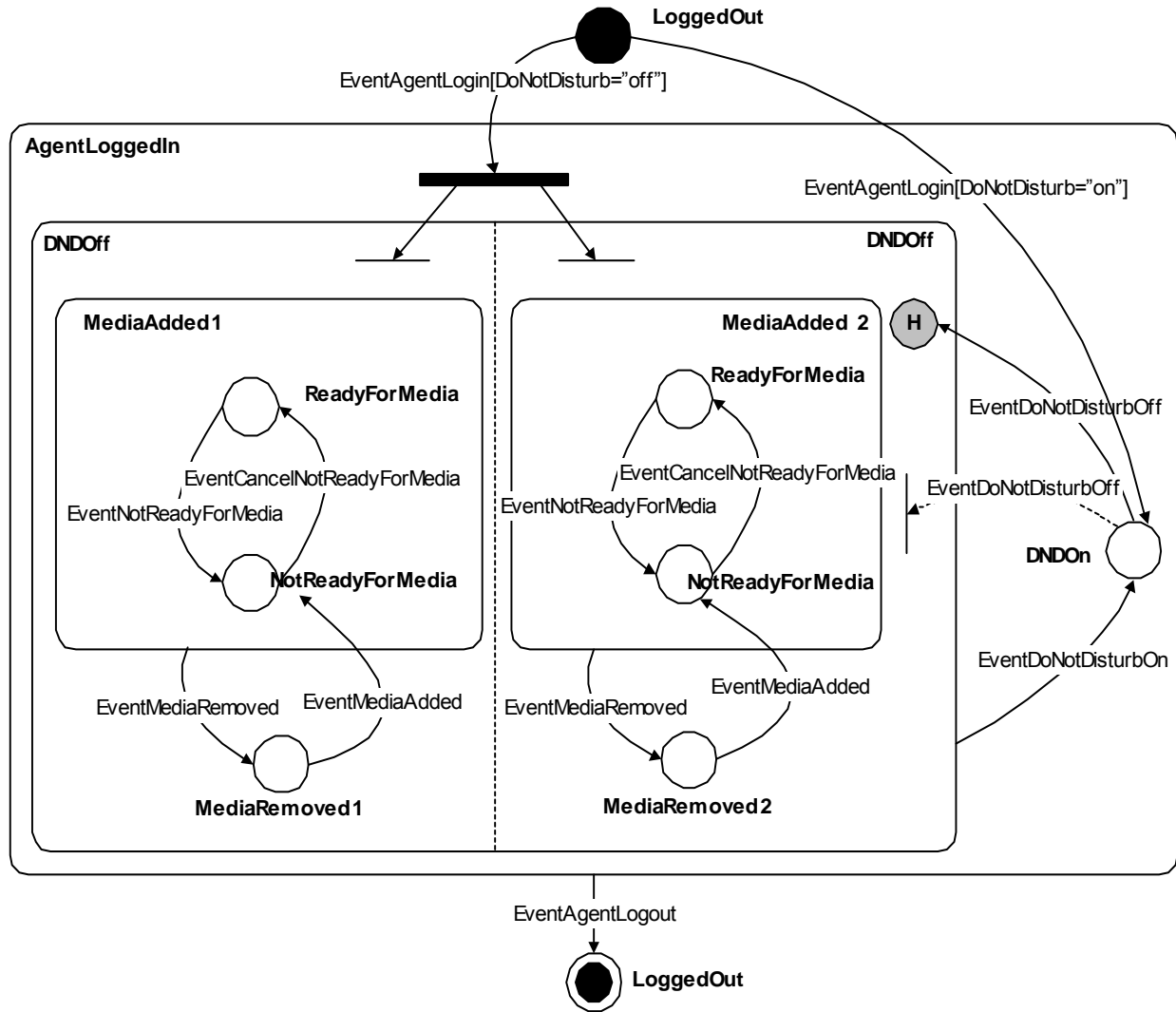


Figure 63: Multimedia Agent State Machine

Let us explain behavior represented in the diagram and interpret it in terms of agent status behavior.

Initial and Final States

The initial and final states, represented by a solid black dot and a black dot surrounded by circle respectively, correspond to the Loggedout agent state.

The AgentLoggedIn State

When Stat Server receives an `EventAgentLogin` event from Interaction Server, the machine proceeds to the `AgentLoggedIn` state. `AgentLoggedIn` is a super state that contains two states `DNDOff` and `DNDOn`. The state machine enters one of the states depending on the setting for the `DoNotDisturb` parameter contained in the `EventAgentLogin` event.

The Media Channels

DNDOff is also a super state, which contains parallel sequences, one for each media channel. Each sequence consists of a state machine representing the status of the media channel. For example, the state `MediaAdded_1` indicates that the specified media channel is in an active media list and can be used for receiving new interactions. The `MediaRemoved_1` state indicates that the media channel does not exist in an active media list. The agent state machine can enter the `MediaRemoved_1` state via an `EventMediaRemove` event or via an `EventAgentLogin` event that does not contain the particular media channel in its `MediaTypeList` parameter.

The MediaAdded and MediaRemoved States

The `MediaAdded_N` ($N=1, 2$) state is a super state which represents the availability of the specified channel or channels for receiving interactions. The state changes are triggered by the `EventNotReadyForMedia` and `EventCancelNotReadyForMedia` events.

Note: Note that the initial states of super states, represented by arcs that end at a thick bar, are not specified. The actual states depend upon parameters in `EventAgentLogin` event. This event contains `MediaTypeList` parameter that contains a list of media types that will be activated after login. If, for example, both media types are present, the initial states will be `MediaAdded_1` and `MediaAdded_2`. If, however, the list will contain only second media then initial states will be `MediaRemoved_1` and `MediaAdded_2`.

If some media channel, for example a channel called `Media 1`, is active (that is, the state machine indicates its condition with the `MediaAdded_1` state) then at any time it might become inactive after receiving an `EventMediaRemoved` event. If, after receiving the `EventMediaRemoved` event, `Stat Server` receives an `EventMediaAdded` event, the state machine changes to the `MediaAdded_1` super state with the `NotReadyForMedia` substate within it.

For each media type presented in `MediaTypeList` parameter the `EventAgentLogin` contains its initial state `ReadyForMedia` or `NotReadyForMedia` that point out corresponding initial states within super states `MediaAdded_N` ($N=1, 2$).

Note: The `EventRemoveMedia` event does not influence the state of interactions currently being processed.

Do Not Disturb Events

If agent has active channels and is in the `DNDOff` super state, a `EventDoNotDisturbOn` event effectively means that the agent cannot receive a new interaction by any channel. Note that a `EventDoNotDisturbOn` event freezes the activity that was happening when the agent was in the `DNDOff` state. These

become active again after reception of an EventDoNotDisturbOff event. In this case, the internal DNDOff super state is restored, indicated in Figure 63 on page 82 by the H symbol.



If the EventAgentLogin event has the DoNotDisturb parameter set to on, then the state machine enters the DNDOn state, where all media channels are inactive. They become active after receiving EventDoNotDisturbOff event. In this case, the initial states of the DNDOff super state are set according to the other parameters contained in the event. This case is indicated in Figure 63 by a dotted arc that ends in a vertical bar.

The EventAgentLogout Event

Receiving EventAgentLogout event at any time results in termination of all activities, which corresponds to the clearing all states within the AgentLoggedIn super state.

Metrics: Their Composition and Definition

A *metric* defines what and how Stat Server is to measure certain interactions within a contact center. A metric is defined by four elements:

- Statistical type
- Time range
- Time profile
- Filter

Each is described in the following subsections.

Statistical Type

A *statistical type* (*stat type*) is comprised of one or more of the following statistical parameters:

- [Objects](#)
- [Category](#)
- [Subject](#)
- [MainMask](#)
- [RelMask](#) (optional)
- [Description](#) (optional)
- [MediaType](#) (optional)
- [Formula](#) (optional)

The “Stat Server Stat Type Definitions” chapter in the *Solution Reporting Templates* book of the *Reporting Technical Reference* series offers all of the predefined statistical types used in the Genesys-provided reports to define metrics. In addition, you can create your own stat types. The “Creating Custom Stat Types” chapter in the *Customization* book of this series shows you how.

Note: When loaded, Java Stat Server Extensions (SSJE) pass their own stat type definitions for all inherent statistical types to Stat Server, making them available to Stat Server clients. These stat types can be real-time

or historical and, unlike regular stat types, are dynamic in nature. This means that they are enabled only if the corresponding SSJE is loaded.

These are the parameters for Java stat types:

- JavaSubCategory
- AggregationType
- Description
- Category
- Objects
- <business attribute> (MediaType)

Objects

The *object types* assigned to a stat type are formed from the list of object types Stat Server supports, namely:

- Agent
- Agent Group
- Calling List
- Campaign
- Campaign Calling List
- Campaign Group
- Place
- Place Group
- Queue
- Queue Group
- Regular DN
- Routing Point
- Routing
- Staging Area
- Switch
- Tenant
- Virtual Queue
- Virtual Routing Strategy

A stat type is typically defined for several compatible object types, rather than just one, which allows one stat type to serve several metrics. However, a stat type can only be applied to object types within the same *compatibility group*. The group of object types is said to be compatible if objects within the group are reachable during the propagation of actions (see “Action Generation and Propagation” on [page 76](#)). For example, the RegDN, Place, Agent, GroupAgents, and GroupPlaces object types all belong to the same compatibility group because all of them are reachable during propagation of an action started at the RegDN object.

[Figure 64](#) shows the partitioning of object types into the Agent, Queue, and Campaign compatibility groups. Staging Area (an e-mail “queue”) and Tenant are each the sole member of their group.

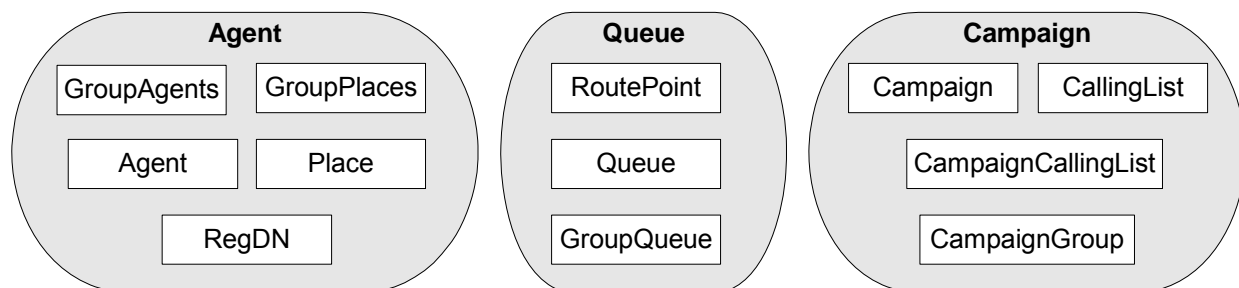


Figure 64: Partitioning Objects into Compatibility Groups

For example, assigning the RegDN, Place, and Agent object types to one stat type is valid, but assigning the RegDN, Place, and GroupQueue object types to

one stat type is not. The GroupQueue object falls in a different compatibility group than RegDN and Place objects.

MainMask

A *main mask* specifies the set of actions or statuses Stat Server considers when calculating a statistic (see also “RelMask” on [page 87](#)). In the simplest case, the main mask might specify only one action or status. For example, a main mask specifying the Cal I Inbound action provides a statistic related to this one action. If you need a total number of inbound calls on some DN, then the statistic calculates the number of occurrences of the Cal I Inbound action within a specified time interval. If you need total duration of inbound calls on some DN, the metric sums the duration of all Cal I Inbound actions within the specified time interval.

The main mask might be constructed from several actions (or statuses). If so, the statistic considers all specified actions without differentiating between them. For example, suppose the main mask is constituted of two actions: Cal I Inbound and Cal I Outbound. To calculate total time of external (inbound and outbound) calls, use this mask. The metric sums the time duration of all these actions.

Genesys does not recommend assigning overlapping actions to one mask. For example, an assignment of the Monitored and LoggedIn actions results in the return of senseless data because, by definition, statuses cannot overlap.

Specify a main mask by a list of comma-separated action (or status) names. Use the asterisk (*) symbol to specify all actions (or statuses); use the tilde (~) symbol to exclude a particular action (or status). The following examples are valid main-mask specifications:

```
Mai nMask = Cal I Inbound
Mai nMask = Cal I Inbound, Cal I Outbound
Mai nMask = *, ~LoggedOut
```

In the last line, the main mask is specified as all statuses except LoggedOut.

It is very important to specify masks correctly. For example, these two main masks are not equivalent:

```
Mai nMask = LoggedOut
Mai nMask = *, ~LoggedIn
```

Indeed, despite the fact that LoggedIn and LoggedOut actions are complementary, calculations of duration time based on these two masks might report different results because the first mask indicates the duration when an agent was logged out and monitored, while the value of the second mask indicates the duration an agent was not logged in, which is equal to the time when agent was logged out and monitored plus the time s/he was not monitored. The latter value might be greater than the former.

RelMask

You specify a *relative mask* for calculating statistics reflecting relative values, such as percentages and averages. For example, a metric defining the percentage of inbound calls in all external calls (inbound and outbound) requires a relative mask. But assign the superset to the relative mask; otherwise the end result makes no sense:

```
MainMask=Inbound
RelativeMask=CallInbound, CallOutbound
```

The syntax is the same as for a main mask.

Subject

The *subject* of a stat type specifies the object type that will be considered as a source of statistical data. A subject might be one of the following:

- DNAction
- PlaceStatus
- DNStatus
- GroupStatus
- Action
- CampaignAction
- AgentStatus

The first part of each compound name indicates the object type: DN, Agent, Place, Group, or Campaign. The second part indicates whether to consider actions or statuses. Hence, a *DNAction* subject assignment reveals that the source of statistics for all objects is the *actions* of a regular DN. The *AgentStatus* subject reveals that statistics will be gathered from the *statuses* of Agent objects.

The *Action* subject is used for multimedia statistics. It is analogous to the *DNAction* subject for telephony interactions.

To clarify the subject's role, consider the following example:

```
MainMask=CallOnHold
Object=GroupAgent
Subject=DNAction
```

This definition tells us that metrics should be calculated for the GroupAgent object. The data source is Regular DN objects, which is where the CallOnHold action is tracked. This action will be propagated from the DN object to the GroupAgent object (according to the action propagation process, as discussed on [page 76](#)) and collected for this object. As a result, you receive a calculation of CallOnHold actions for the GroupAgent object.

If, however, you select GroupStatus as the subject, then you must redefine the main mask to track statuses pertaining to a group and you will receive a different statistical value.

Category

The *statistical category* element of a stat type determines how to calculate a statistical value. Think of a statistical category as the algorithm used to

calculate a value. The calculation uses one or more masks as input parameters. [Table 3](#) describes some of the statistical categories used for Historical Solution Reporting.

Note: Refer to the *Framework Stat Server User's Guide* for complete information about statistical categories.

Table 3: Statistical Categories for Historical Solution Reporting

| Statistical Category | Description |
|-----------------------|--|
| AverageTime | The quotient of the Total Time aggregated value for the main mask and the Total Number aggregated value for the relative mask. |
| TotalNumber | For subject DN action, the total number of actions listed in the mask that ended (for durable actions) or occurred (for instantaneous actions) during the interval from which the statistic is calculated. For subject DN status (and, respectively, agent status and place status), this is the total number of statuses listed in the mask that either started or are in progress during the interval from which the statistic is calculated. |
| TotalTime | <p>The sum of all durations of durable and retrospective, instantaneous actions or of statuses listed in the mask that:</p> <ul style="list-style-type: none"> • Ended (for durable actions) • Occurred (for retrospective, instantaneous actions) • Either started or are in progress (for statuses) <p>during the interval from which the statistic is calculated. Momentary actions listed in the mask are ignored since they do not have a duration. If a statistic is requested for statuses, Stat Server uses the status duration within the statistical interval for calculation; otherwise Stat Server uses the entire action duration.</p> |
| TotalTimeInTime Range | Represents the total duration of all durable and retrospective, instantaneous actions or of statuses listed in the mask that ended (for durable actions or for statuses) or occurred (for retrospective, instantaneous actions) during the interval from which the statistic is calculated and whose duration is within the specified time range. Unlike other historical aggregated values, these values depend not only on the mask and the interval from which the statistic is computed, but on the time range as well. |

Table 3: Statistical Categories for Historical Solution Reporting (Continued)

| Statistical Category | Description |
|----------------------|---|
| MaxTime | <p>The maximum duration among all durations of durable and retrospective, instantaneous actions or statuses listed in the mask that:</p> <ul style="list-style-type: none"> • Ended (for durable actions) • Occurred (for retrospective, instantaneous actions) • Either started or are in progress (for statuses) <p>during the interval from which the statistic is calculated. Momentary actions listed in the mask are ignored since they do not have a duration. If a statistic is requested for statuses, Stat Server uses the status duration within the statistical interval for calculation; otherwise Stat Server uses the entire action duration.</p> |
| MinTime | <p>The minimum duration among all durations of durable and retrospective, instantaneous actions or of statuses listed in the mask that:</p> <ul style="list-style-type: none"> • Ended (for durable actions) • Occurred (for retrospective, instantaneous actions) or • Either started or are in progress (for statuses) <p>during the interval from which the statistic is calculated. Momentary actions listed in the mask are ignored since they do not have a duration. If a statistic is requested for statuses, Stat Server uses the status duration within the statistical interval for calculation; otherwise Stat Server uses the entire action duration.</p> |
| TotalAdjusted Number | <p>Sums the total number of occurrences of actions or statuses listed in the main mask that are ended during the interval from which the statistic is calculated.</p> <ul style="list-style-type: none"> • The Total AdjustedNumber category differs from Total Number only if reset-based notification is used for the statistic. For all other notification modes, Total AdjustedNumber values are the same as Total Number. |

Table 3: Statistical Categories for Historical Solution Reporting (Continued)

| Statistical Category | Description |
|----------------------|---|
| TotalAdjustedTime | <p>If a statistic is requested with DN action specified, Total AdjustedTime is the sum of all durations of durable and retrospective, instantaneous actions listed in the mask that:</p> <ul style="list-style-type: none"> • Either ended or are in progress (for durable actions) • Occurred (for retrospective, instantaneous actions) <p>during the interval from which the statistic is calculated. Momentary actions listed in the mask are ignored since they do not have a duration. Only the duration time that is within the interval is used in this calculation. For status-based statistics, Total AdjustedTime is the sum of all durations of durable and retrospective, instantaneous actions listed in the mask that ended or occurred (for retrospective, instantaneous actions) during the interval from which the statistic is calculated.</p> <p>Stat Server uses the overall status duration in this calculation. A statistic of this category must be requested with the reset-based notification; that is, a statistic is reset to zero when a new interval starts.</p> <ul style="list-style-type: none"> • The Total AdjustedTime category differs from Total Time only if reset-based notification is used for the statistic. For all other notification modes, Total AdjustedTime values are the same as Total Time values. |

Using Statistical Categories: Examples

How does the choice of different statistical categories and subjects influence the calculation method? [Figure 65](#) presents a simple example of the CallInbound action and status on a single regular DN. Let us consider two stat types formulated for the same statistical category, one with Subject=DNAction, the other with Subject=DNStatus.

For simplicity, there is no more than one action at a time and each occurrence of the action changes the status to the same type, CallInbound, as the action.

Suppose you observe these actions and statuses during two time intervals: 10:00-10:15 and 10:15-10:30. During these periods, a CallInbound durable action occurs on the DN several times. Each occurrence is preceded by a CallInboundStarted initial momentary action (not shown).

Note: For graphical simplicity, [Figure 65](#) shows calls in minutes. However, because Stat Server tracks seconds, the results for each statistical category in the following discussion are given in seconds (where appropriate) rather than minutes.

These stat types have different meanings that are reflected in the statistical calculations. In the examples that follow, the choice of subject for the stat type is shown in bold typeface.

- **Subject is Action Based**—The number and duration of actions during a time interval are not calculated until the action has been completed. Therefore, an action that starts in one interval and ends in the next is only

counted in the second interval. However, the duration time given in the second interval includes the entire duration of the action, even the part that occurred during the first interval.

- **Subject is Status Based**—The number and duration of each occurrence of a status during an interval is calculated for that interval, even if the status continues past the end of the interval. Only the time that falls within the interval is calculated, even for actions that start or end outside of the interval.

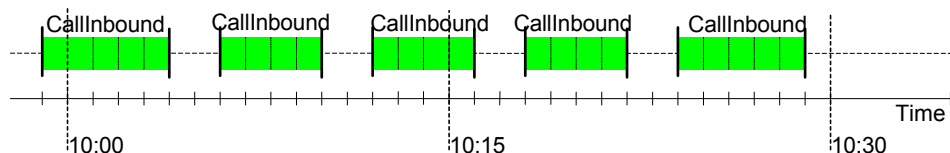


Figure 65: Example of CallInbound Action and Status

**TotalNumber
Statistical
Category**

First consider the Total Number statistical category and the values it yields in the example when applied to the CallInbound:

Action—For the first interval 10:00-10:15, Total Number returns a value of 2 because only two actions ended within this interval. For the second interval, 10:15-10:30, Total Number yields 3 since three CallInbound actions ended during this interval.

Status—Both intervals yield 3 because there were 3 occurrences of the status during each interval.

Initial Momentary Action—If you apply the Total Number category to the CallInboundStarted initial momentary action, then you obtain a value of 2 for each interval, because the action occurred two times within each interval.

**TotalTime
Statistical
Category**

Now consider the Total Time statistical category and the values it yields in the same example when applied to the CallInbound:

Action—The first interval yields 540 seconds, representing the total duration of the two actions that ended within the interval. The third action that occurs at 10:12 does not contribute to the final result as it does not end within the interval. For the second interval, you obtain 780 seconds since all three actions end within the interval.

Status—The first interval yields 660 seconds; the second interval yields 600 seconds. These values include the duration of each occurrence of the CallInbound status during the interval.

Initial Momentary Actions—Applying the Total Time category to the CallInboundStarted momentary action results in a value of 0 because initial momentary actions have no duration.

**MaxTime
Statistical
Category**

Now apply the MaxTime statistical category to the CallInbound:

Action—You obtain a value of 300 seconds for the first interval. Two actions (the first and second) ended during the interval. The total duration of each action that ended in the interval is counted, so the longer first action provides

the value. For the second interval, you obtain a value of 300 because the longest action in the interval lasts 300 seconds.

Status—You receive values of 240 and 300 for first and second intervals respectively.

MinTime Statistical Category

The `MinTime` statistical category returns:

Action—A value of 240 for both intervals when applied to the `CallInbound` action.

Status—A value of 240 for both intervals when applied to the `CallInbound` status.

TotalAdjusted Time Statistical Category

Action—Returns values of 660 seconds and 600 seconds, respectively, for the `CallInbound` action.

Status—Returns values of 540 and 780 for the first and second interval, respectively, for the `CallInbound` status.

TotalAdjusted Number Statistical Category

The `TotalAdjustedNumber` category returns the values 2 and 3 for the first and second interval, respectively, for both `CallInbound` action and status.

Calculation Rules for Statistical Categories

The standard Genesys Historical Reporting reports statistical data for a particular time interval; each reported number is calculated only for that time interval (whether it be 15 minutes, 1 hour, 1 day, or other). Because the specified time interval and the corresponding interactions might overlap in different ways, you must understand how each metric is calculated.

There are four possible scenarios for how interactions might overlap during a reporting time interval, namely:

- Scenario 1—The interaction starts and ends within the time interval.
- Scenario 2—The interaction starts before the time interval and ends within the time interval.
- Scenario 3—The interaction starts during the time interval and ends after the time interval.
- Scenario 4—The interaction starts before the time interval and ends after the time interval.

For each scenario, the following calculation rules clarify how the statistical categories function:

- `TotalNumber` calculates the total number of interactions finished during the time interval.
- `TotalTime` calculates the total number of interactions existing during the time interval.
- `AverageTime` calculates the average duration of all completed interactions within the time interval.

Scenario 1 The first and simplest scenario occurs when a particular interaction both starts and ends within a time interval. [Figure 66](#) depicts this scenario.

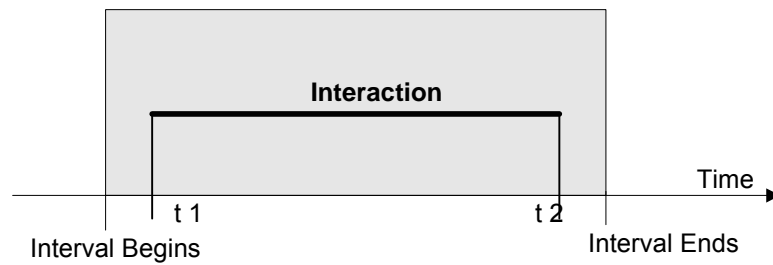


Figure 66: Entire Interaction Occurs Within Interval

The Total Number statistical category yields a value of 1 because the interaction ends within the time interval. Total Time yields the time indicated by $t_2 - t_1$. AverageTime yields the result of $(t_2 - t_1)/1$.

Scenario 2 Scenario 2 occurs when the interaction starts before the time interval and ends within the time interval (see [Figure 67](#)).

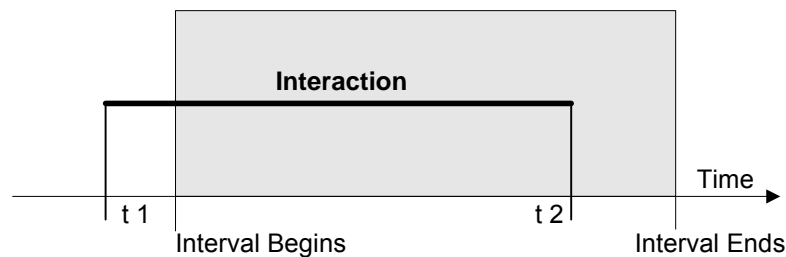


Figure 67: Interaction Begins Before but Ends Within Interval

The Total Number statistical category yields a value of 1 because the interaction ends within the time interval. Total Time yields the time indicated by $t_2 - [\text{Interval Begins}]$. AverageTime yields the result of $(t_2 - t_1)/1$.

Two Total Time metrics are calculated for this scenario:

- The total duration of all interactions occurring within the time interval, counting only the time that falls within the specified time interval, that is, $t_2 - [\text{Interval Begins}]$.
- The total duration of all interactions ending within this time interval, counting the entire duration of interactions including even duration that falls outside of the time interval. In this case it is the result of $(t_2 - t_1)$.

A second stat type is necessary to calculate the average interaction time for the aggregated time intervals.

Scenario 3 Scenario 3 (see [Figure 68](#)) occurs when the interaction starts within the time interval, but ends following the time interval.

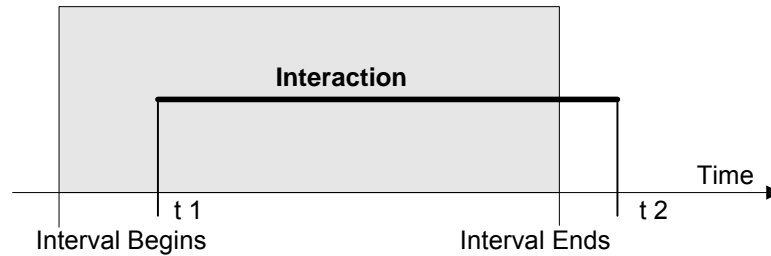


Figure 68: Interaction Begins During but Ends Outside Interval

The Total Number statistical category yields a value of 0 because the interaction does not end within the time interval. Total Time yields the time indicated by $[\text{Interval Ends}] - t_1$. Average Time yields 0 because no interactions ended within the time interval.

Two Total Time metrics are calculated for this scenario:

- The total duration of all interactions occurring within the time interval, counting only the time falling within the specified time interval ($< \text{Interval Ends} > - t_1$).
- The total duration of all interactions ending within the time interval including the entire interaction time, even the duration falling outside the time interval. In this case, the result is 0 because no interaction ends within the interval.

Scenario 4 Scenario 4 (see [Figure 69](#)) occurs when the interaction starts before the time interval and ends following it.

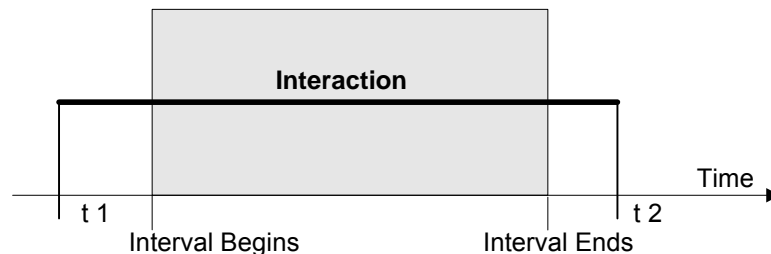


Figure 69: Interaction Begins Before but Ends After Interval

The Total Number statistical category yields a value of 0 because the interaction does not end within the time interval. Total Time yields the time indicated by $[\text{Interval Ends}] - [\text{Interval Begins}]$. Average Time yields 0 because no interactions ended within the interval.

Two Total Time statistical categories are calculated for this scenario:

- The total adjusted duration of all interactions happening within the time interval, counting only the duration within the specified time interval, namely: $[\text{Interval Ends}] - [\text{Interval Begins}]$, the length of the interval.
- The total duration of all interactions ending within time interval. This does not apply to this scenario, so the result is 0.

Statistical Category Summary Example

The `TotalAdjustedTime` statistical category is applicable to reset-based time profiles and behaves as follows:

- For a `DNAction` or `Action` subject, `TotalAdjustedTime` reports finished and unfinished actions for the current interval. This is necessary for reports where you want to see that an agent has performed work, even if it is not yet finished.
- For the `DNStatus` and `AgentStatus` subjects, however, `TotalAdjustedTime` causes Stat Server to report the entire time a DN or Agent status occurs only if it ends within the time interval. This is necessary to correctly calculate averages after daily, weekly, monthly, quarterly, and yearly aggregations.

For example, an agent performs an action that spans two 15-minute intervals. The action endures 14 minutes, consuming 7 minutes in each interval (see [Figure 70](#)).

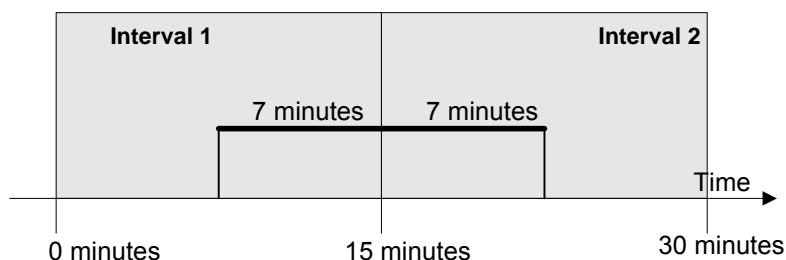


Figure 70: Statistical Category Summary Example

Historical statistical categories would report the following:

| | TotalTime | | TotalAdjustedTime | | TotalNumber | | TotalAdjustedNumber | |
|---------------|--------------|--------------|-------------------|--------------|--------------|--------------|---------------------|--------------|
| | 1st Interval | 2nd Interval | 1st Interval | 2nd Interval | 1st Interval | 2nd Interval | 1st Interval | 2nd Interval |
| Action | 0 | 14 | 7 | 7 | 0 | 1 | 0 | 1 |
| Status | 7 | 7 | 0 | 14 | 1 | 1 | 0 | 1 |

Formula

Custom formula is an element of a statistical type. This formula might contain a component called `DistByConnID` (or `DCID` for short) to distinguish actions related to the same call (that is, having the same `ConnID`). When used, this qualifier brings the call identifier into the equation when determining statistical values.

Suppose, for example, the six durable `CallOnHold` actions illustrated in [Figure 71](#) are observed on a regular DN within a 15-minute period. If you calculate the total number of occurrences of this action without using the `DistByConnID` qualifier, you get a value of 6, which could be interpreted as the number of times the *DN* was on hold. If, however, you want to know how many *calls* were on hold during the interval, you must apply the `DistByConnID`

qualifier. In this case, the metric calculates only first, third, and fourth actions. The second action is not considered because it has the same connection ID as the first action. The fifth and sixth actions are also dropped from the calculation for the same reason. As a result, you get a value of 3—exactly the number of calls held during the interval.

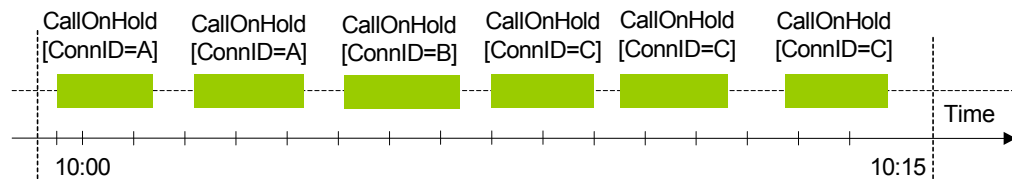


Figure 71: Using DistByConnID Qualifier

The `DistByConnID` component affects only number-related, percentage, and average metrics. Time-related metrics are not affected and, in fact, ignore this qualification. This means that the total time of `CallOnHold` in the previous example will be summed as normal.

Description

An optional description of the stat type. Stat Server does not use this parameter to calculate values or to generate actions.

MediaType

MediaType is the business attribute that you can use to distinguish the type of media for which Stat Server is collecting data using the associated stat type.

You can configure a single core stat type and use it to collect statistics for multiple media types, using filters to distinguish the media types. However, statistics that derive from the Stat Server Java extension are distinguished by the value of the *MediaType* parameter. You cannot use filters to distinguish media for these statistics. Therefore, you must configure separate stat types for each media type using extension statistics.

Note: You can use only one business attribute when defining a stat type.

JavaSubCategory

This parameter is used only in Java stat types; that is statistics drawn from the Stat Server Java Extension. It is the name of the Java subclass that implements statistic calculation.

AggregationType

This parameter is only used in Java stat types. It indicates the kind of aggregation that the client application is to perform on the data sent by Stat Server.

Stat Type Examples

Now apply these concepts to a couple of stat types.

| Stat Type: <i>TotalHandleStatusTime</i> |
|--|
| Objects = Agent, Place, GroupAgents, GroupPlaces Category = TotalTime MainMask = CallInbound, CallOutbound, AfterCallWork Subject = AgentStatus |

Use the TotalHandleStatusTime stat type to calculate the total call-handling time by agents. You can apply to this stat type four objects:

- Agent
- GroupAgents
- Place
- GroupPlaces

If the object is Agent, then the calculation sums the duration (category TotalTime) of times that the agent spends processing inbound and outbound calls along with after-call-work times. This calculation is defined by a list of actions in the main mask of the type. The calculation yields an identical result for the Place object.

If the object type is group of agents (or group of places), then the value is calculated as a sum of all total times for all agents (places) of the group.

| Stat Type: <i>TotalNumberInboundCalls</i> |
|---|
| Objects = RegDN, Agent, Place, GroupAgents, GroupPlaces Category = TotalNumber MainMask = CallInbound Subject = DNAction |

The TotalNumberInboundCalls stat type defines the parameters for calculation of the total number of inbound calls for objects like Regular DN, Agent, Place, Group of Agents, and Group of Places. If the object is a Regular DN, then Stat Server sums all inbound calls occurring on this DN. If the object is an agent who has only one DN, then the calculated value is identical to its DN. If, however, the agent has two or more DNs, then the value is a sum of the values of all its DNs. A similar summation is performed for the Place and Group object types.

Time Profile

The *time profile* parameter defines the time intervals used for calculating historical aggregate values for statistics. Historical Reporting uses the CollectorDefault time profile which has a Growing interval type. This time profile defines moments of time when Stat Server returns statistical values to a client and resets statistics to zero to start collecting data for the next time period.

Note: You can find other time profile types described in the *Framework Stat Servers User's Guide*.

Time profile is defined in the form `<time> +<increment>` where `<time>` is the time for the initial resetting of the statistics and `<increment>` defines a series of times for resetting statistics. For example, the time profile expressed as `08:00 +00:15` says that the initial reset procedure is performed daily at 8 AM and is reset every 15 minutes, at which point the statistical data is sent to Stat Server clients.

Thus, the time profile simultaneously defines intervals for collecting statistical values and a schedule for delivering these values to clients.

The time profile might have a more complicated form with several expressions separated with commas. For example, a time profile defined as `"08:00 +00:15; 17:00 +00:30"` says that the first reset will be at 8 AM. Resets will occur every 15 minutes until 5 PM. At 5 PM, resets will occur every 30 minutes until 8 AM of the next day, and so on.

Time Range

This statistical parameter defines the time range for collecting data for several stat types that calculate values occurring within the time range interval.

The time range is specified as two digits separated by a hyphen. The first digit corresponds to the starting point and the second to the end point, in seconds. Thus, the `0-30` time range defines a range between 0 and 30 seconds.

Figure 72 illustrates a time range applied to five calls within a queue. Suppose you wish to calculate the total number of calls distributed from a queue within 2 minutes (120 seconds). The time range is `0-120`. Further, suppose that five `CallWait` durable actions occur within the 15-minute interval illustrated in Figure 72. Notice that four actions end with `CallDistributed` retrospective actions and one of them ends with `CallAbandoned`.

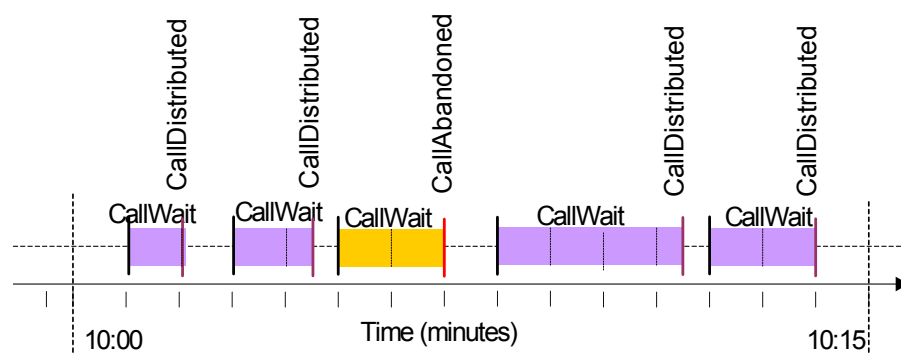


Figure 72: Using the Time Range Parameter

Now assign the `CallDistributed` retrospective action to the main mask of your stat type. Select the `TotalNumberInTimeRange` statistical category. A metric

defined as such yields a value of 3. Indeed, the first, second, and fifth actions play into the calculation because these actions were distributed from the queue within 120 seconds. The third action does not because it does not meet the main mask specification; the call was abandoned, not distributed. Nor does the fourth action play into the calculation because its duration, exceeding 120 seconds, falls outside the time range.

Filters

A *filter* is the part of a metric that refines calculations of aggregated values. More specifically, filters exclude certain actions based on criteria specified in a logical condition. Filters are based on action attributes, such as DNIS, ANI, CustomerID, MediaType, ThisQueue, and Treatment.

Note: You cannot apply filters to Java-category statistical types.

You specify a filter by a text string containing a logical condition, which must be evaluated for each action. If the result is true, then the action is included in the calculation. Otherwise, the action is excluded.

These are examples of valid filters:

```
PairExist("CS", "Gold")
```

```
ANI="1347"
```

```
(MediaType!=Email)&(PairExist("CS", "Platinum"))
```

The first filter determines if the action has user data with a TKV pair ("CS", "Gold"). The second filter checks to see if the action's ANI attribute is equal to 1347. The third filter exacts a complex logical condition. The condition is true only if the action contains a MediaType attribute not equal to e-mail and if the TKV pair ("CS", "Platinum") exists in the user's data.



Chapter

3

Historical Reporting

This chapter describes the Genesys approach to Historical Reporting and includes these sections:

- [Introduction, page 101](#)
- [Data Collection Services, page 104](#)
- [Data Mart Services, page 114](#)
- [Information Delivery Services, page 118](#)
- [Sizing and Scalability, page 120](#)

Introduction

Historical Reporting collects and presents information about contact center activities over long periods of time—weeks, months, and years.

The Historical Reporting architecture is presented in [Figure 73](#). The primary sources of historical information are Stat Server and Configuration Server.

- Stat Server tracks statistics for contact center objects such as Agents, Agent Groups, Places, Group of Places, and so on. It interprets events generated by T-Server, SIP Server, and Interaction Server (for Genesys Multimedia).
- Configuration Server tracks contact center configuration information, dynamically updating data such as agents, their groups, and their skills.

Data from these sources goes through three stages: collection, transformation and aggregation, and delivery. Three subsystems support these activities:

- The Data Collection Services
- The Data Mart Services
- The Information Delivery Services

Data Collection Services

The three components of Data Collection Services gather raw information about objects and data generated by Stat Server:

- **Data Sourcer**—Obtains object statistics from Stat Server at each collection time interval and writes them to ODS.
- **Data Modeling Assistant (DMA)**—A graphical user interface (GUI) application with which contact center administrators define report layouts and set time intervals for data retrieval from Stat Server.
- **Operational Data Storage (ODS)**—Temporarily holds raw statistical data about objects sourced from Stat Server.

Data Mart Services

After collection in ODS, data enters the Data Mart Services, which organizes, summarizes, and optimizes data for Solution Reporting using these components:

- **ETL Runtime**—Maps ODS tables to Data Mart tables, which are used for Solution Reporting and analysis. At each time interval, ETL Runtime extracts raw statistics from ODS, applies transformation and summarization rules, and loads the data into the Data Mart.
- **Data Mart**—The target database for static and ad-hoc reporting.
- **ETL Assistant**—A GUI tool enabling contact center managers to specify the Data Mart loading interval, ODS, and purging rules—the ETL time profiles—and browse available aggregation levels.

Information Delivery Services

Finally, Information Delivery Services provide report development and distribution. Both CCPulse+ and CC Analyzer draw on the Data Collection Services and Data Mart Services components to present historical information.

- **CCPulse+**—Generates real-time views as well as historical and query based views.
- **CC Analyzer**—Uses SAP Crystal Reports, which is redistributed by Genesys, to generate historical reports.

The following sections describe these data-processing stages in more detail.

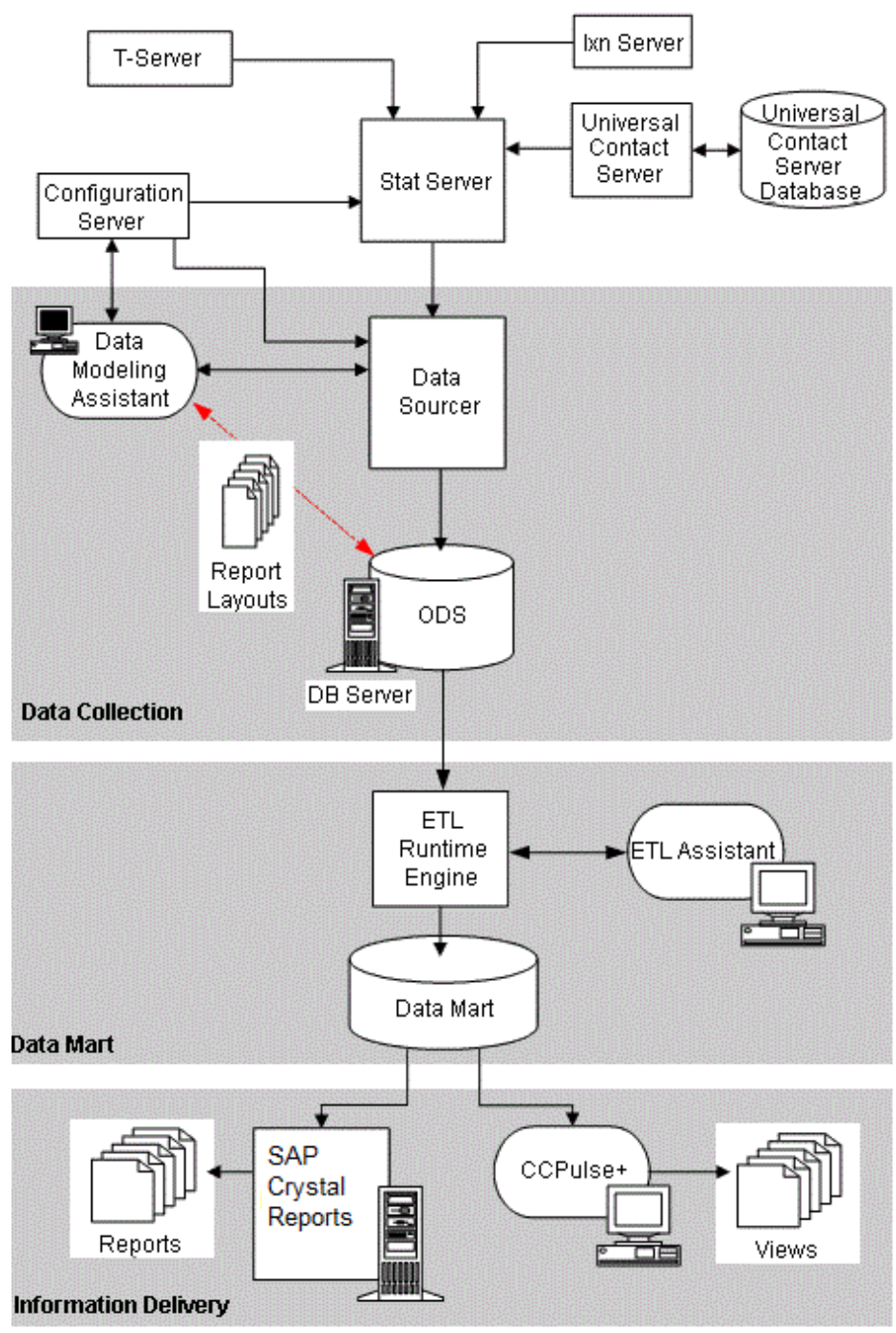


Figure 73: Historical Reporting Architecture

Data Collection Services

The Data Collection Services capture statistics from Stat Server and loads them into ODS for further processing.

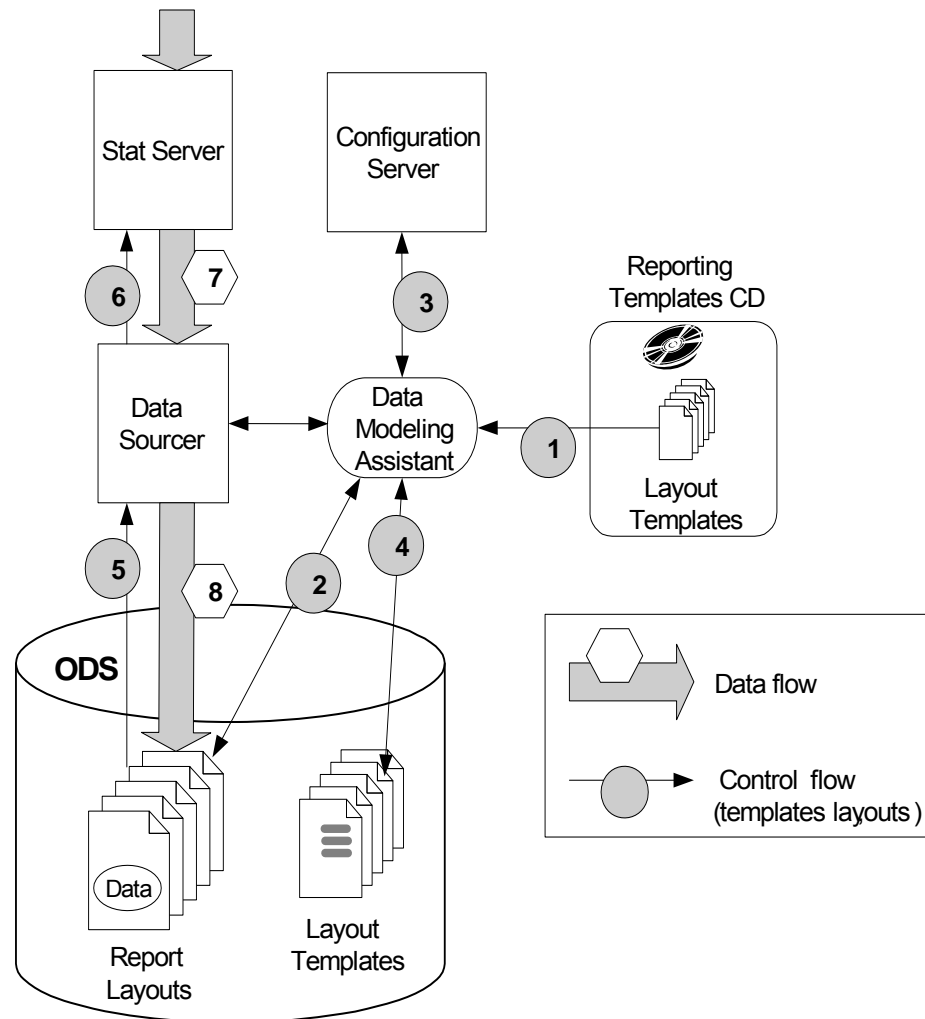


Figure 74: Data Collection Data Flow

The detailed data flow of Data Collection Services shown in [Figure 74](#) depicts a typical scenario using layout templates.

Typically a contact center administrator configures data collection using DMA. Here is the process.

- 1 The administrator identifies the appropriate predefined solution layout template(s) to use. These layout templates are part of the canned (predefined) templates provided for some Genesys solutions. (“Layout Template Structure” on [page 106](#) discusses layout template structure in detail.)

Note: You can create new layout templates from scratch or based on the provided templates. In addition, you can design custom statistical parameters to use in your templates. “Creating a Layout Template” in the *Customization* book of the *Reporting Technical Reference* series describes how.

- 2 The administrator imports the chosen templates into ODS using DMA.
- 3 From the Configuration Server, DMA gathers information about the statistical parameters specified in the imported layout templates and writes this information to ODS.
- 4 The administrator then creates report layouts based on these layout templates, creating an association between the layout template and the actual object in the contact center. The administrator next activates the report layout.

Note: You also have the option of creating report layouts from scratch, not based on any particular template.

- 5 Data Sourcer loads the active report layout from ODS to begin data collection.
- 6 Data Sourcer requests the statistics specified in the report layout from Stat Server.
- 7 Stat Server sends the requested information to Data Sourcer.
- 8 Data Sourcer writes this information to ODS into data fields of the corresponding report layout for further processing.
- 9 Configuration Server dynamically updates stat types, filters, and time ranges as they are changed in Configuration Server.

Layout Template and Report Layout

To generate a report about contact center behavior using the Genesys Historical Reporting tools, an administrator must precisely specify the information needed. As with other documents, you can distinguish the content of a report from its presentation. The content is the information gathered. The report presentation indicates how that content looks on the screen or page.

Administrators must specify both the report’s content and its presentation. They create the presentation either in CCPulse+ views or, in CC Analyzer, with the aid of third-party tools such as Crystal Reports Suite. Presentation options are discussed in the “[Information Delivery Services](#)” section on [Page 118](#). To specify report content, the administrator either creates a report layout containing all desired information or uses an existing one. More specifically, the report layout defines which contact center objects and what data about those objects are of interest.

Report layout content includes information about contact center objects, the objects' statistics, time frames in which the statistics should be gathered, and so forth. To simplify report layout creation, Genesys Solution Reporting uses layout templates. Layout templates define the content of a report layout but do not relate to any actual contact center object.

The relationship between a layout template and a report layout is similar the relation between a document template and a document in word-processing applications.

To understand how Genesys Historical Reporting functions, you must be able to distinguish between report layouts and layout templates. These topics are covered in the next subsections.

Note: The discussion in the following sections applies to layout templates for all media types, including custom media types you create using Genesys Open Media. However, you must perform some preliminary configuration before you can create custom media layout templates. Refer to the *Customization* book of the *Reporting Technical Reference* series for more information.

Layout Template Structure

Figure 75 shows the structure of a layout template.

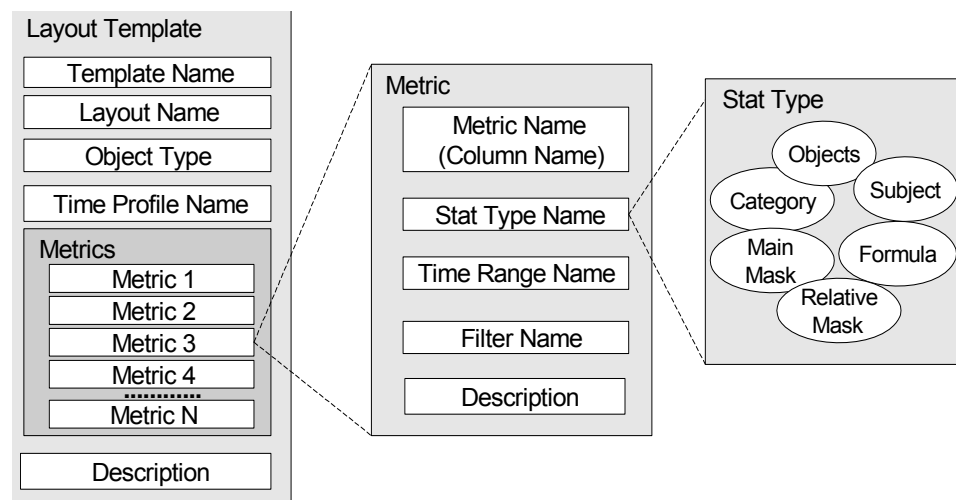


Figure 75: Structure of a Layout Template

Template Name

Each layout template has a unique name (Template Name field). The layout template might specify a report layout name (Layout Name field) to be used when a report layout is created from the template and activated automatically (see “Report Layout Data” on [page 111](#)).

Template Names and Data Mart View Names

Your template name is the source for the Data Mart view name. The view names are created in the format `di_mensi on_tname_aggl evel`.

- *Dimension* is one of [S | O | T | V] (stat, object, time, or value dimension).
- *Tname* is the name of the layout template as defined in DMA
- *Agglevel* is one of [DAY | HOUR | MONTH | WEEK | QUARTER | YEAR | NO_AGG].

The advantages of this naming system are these:

- You can use the same queries and SAP Crystal Report layouts in a multi-tenant environment. Each account uses aliases—or views depending on the database engine—that point to the aliased tables containing report data. As a tenant, you see and use the same table names as other tenants, but the content of generated reports describes your own tenant-specific activity. Tenants can view the report layouts and folders of other tenants but cannot access the tables or the data on which these report layouts and report folders are based.
- You know the table names without having to run ETL Assistant.

Template Object Type

The `Object Type` field indicates the type of contact center object to which you can apply this layout template. For example, you can apply a layout template specifying the Agent object type to an actual Agent object in a contact center.

Template Time Profile

The `Time Profile Name` field defines the time profile to be used for collecting all statistical data.

Layout Template Metric Definitions

The layout template defines a set of metrics to be collected for a specified object. Each metric is described by its own structure.

Note: Strictly speaking, in terms of Stat Server, the layout template's metrics are not *metrics*, but rather *statistics*. They become metrics when they are applied to capture behavior of an object within a configured time profile. By design, one, and only one, time profile can be applied to all of the statistics in a layout template.

Each metric is identified by its unique name or its column name. A metric is comprised of a stat type, a time range (if appropriate), a filter (if appropriate), and a description.

Custom media metrics require specially configured stat types, as explained in “Creating Custom Stat Types” in the *Customization* book of the *Reporting Technical Reference* series.

The stat type name indicates the statistical type employed during statistic calculation. Stat types here hold exactly the same principle as they do in Stat Server. Each stat type contains a list of one or more objects, statistical category, subject, one or more main masks, and, optionally, a custom formula.

Figure 76 shows the layout template structure for an Agent object type within DMA. Note the template name—AGENT—and its layout name—Agent Layout. The time profile associated with the layout template is CollectorDefault. The template contains 28 statistics that measure agent activity. For example, the N_INBOUND statistic is used to calculate the total number of inbound calls.

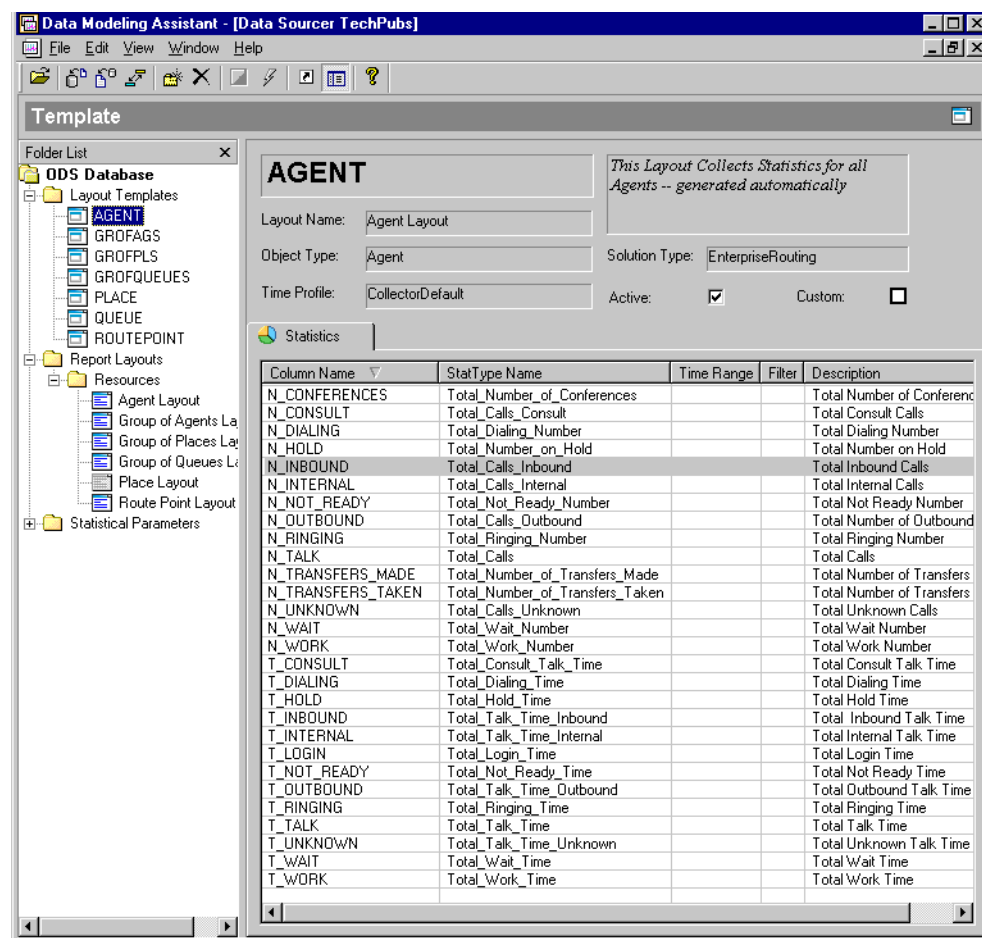


Figure 76: Layout Template Structure, Shown in DMA

If the Active check box is selected, the layout template is active. Active layout templates cause Data Sourcer to automatically create and activate report layouts when the new tenant appears in the system.

Under the Statistics tab, the layout template displays the definitions of all of its statistics. Each statistic is identified by its column name. The tab also displays the stat type definition each statistic follows and the time range and filter if appropriate. These statistical parameters are retrieved from ODS's statistic parameters section.

Figure 77 shows the stat type definition for the N_I NBOUND metric within DMA. Here, when the Total_Calls_Inbound stat type is highlighted in the left pane, the stat type's properties are displayed to the right.

Report Layout Structure

A report layout is a structure that defines report content. It has much in common with layout template structure. The main difference is that the report layout identifies the specific object(s) of a contact center for which Solution Reporting information should be collected and processed.

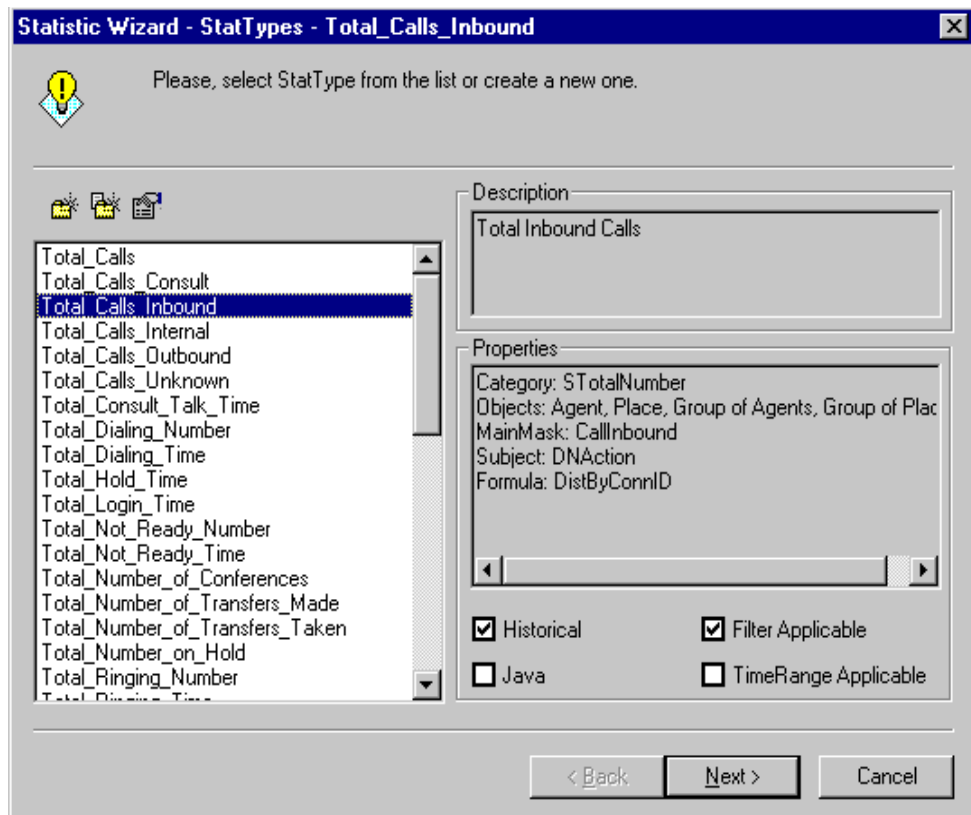


Figure 77: Stat Type Structure (DMA Snapshot)

Report layout structure is illustrated in Figure 78 on [page 111](#). If a report layout is built upon an existing layout template, the report layout inherits the layout template's object type and statistical set. If you build the report layout from scratch, you must specify this information within DMA and associate it with the report layout:

- Layout Name
- Tenant Name
- Metagroup Name
- Template
- Description

In a multitenant environment, the report layout has reference to a specific Tenant object in the contact center.

The reference to the object itself is organized with the aid of metagroups. The report layout cannot refer to a specific object itself but rather to its metagroup. For some objects, the metagroup is defined as the group to which they belong. For example, if you are interested in the activities of a particular agent, then you should select one of the agent groups to which the agent belongs. (Remember, the agent might simultaneously belong to several agent groups.) You can find an example of assigning a metagroup to a report layout in the “Creating Custom Report Layouts” chapter of the *Customization* book of the *Reporting Technical Reference* series.

For each object, the default metagroup, All Objects, defines all objects of the same type. Therefore, for a particular agent you can select one of the agent groups to which the agent belongs or the All Agents default group.

For those objects having no outer group object, use the all objects group default. For example, the AgentGroup object has no outer group object and therefore All Agent Groups is used.

The default metagroups are:

- All Agents
- All Place Groups
- All Places
- All Agent Groups
- All Queue Groups
- All Queues
- All Calling Lists
- All Campaign Groups
- All Regular DNs
- All Campaigns
- All Campaign Calling Lists
- All Routing Points
- All Tenants
- All Staging Areas

Note: You cannot create a report layout that monitors the performance of any specific agent. To track the agent’s performance, select one of the groups to which the agent belongs or select the All Agents metagroup. In both cases, you will receive information about all agents of the metagroup. Then at the next stage (Information Delivery Services) you can extract Solution Reporting information about that specific agent.

Use DMA to observe report layout structure. [Figure 78](#), for example, shows the structure of the Group of Agents report layout based on the AgentGroup object type.

A report layout contains all template-like information, including its metrics. The layout also has some additional information such as activation and deactivation time.

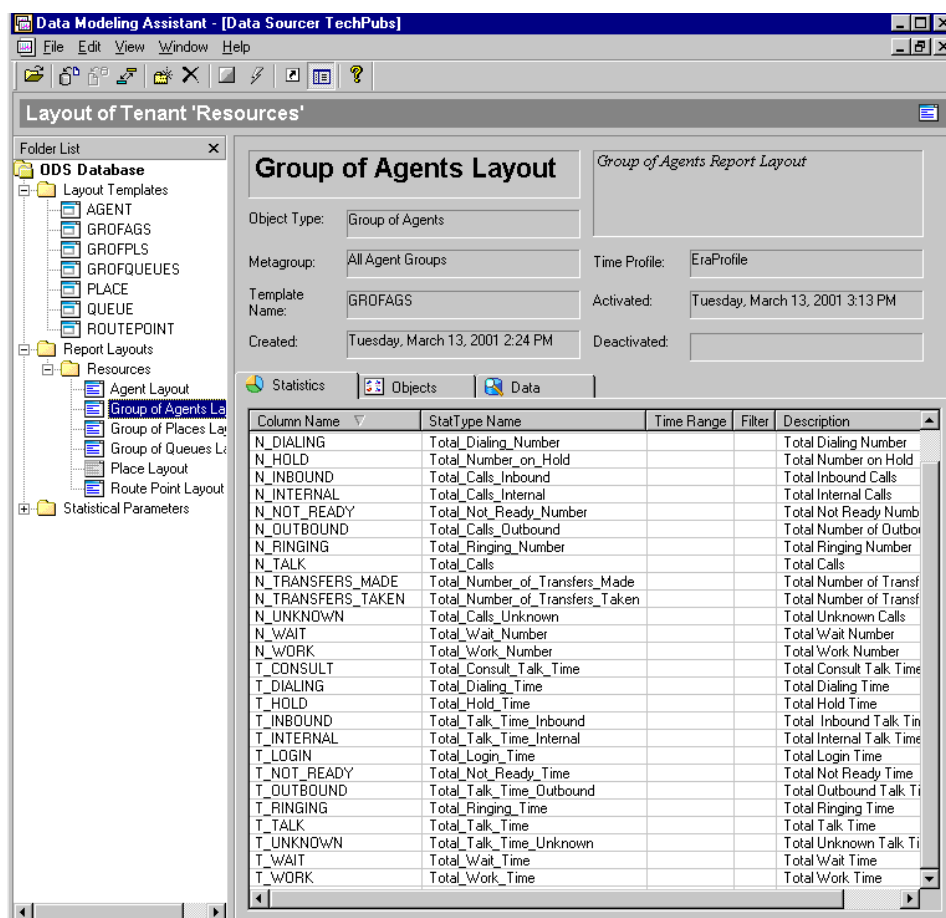


Figure 78: Report Layout Structure, Shown in DMA

Figure 79 shows the relationship between layout templates and report layouts. As you can see, a report layout can refer to only one layout template. At the same time, a layout template might be used by several report layouts. Report layouts need not refer to any layout template (Agent Group Layout 3 in the figure) as they can be created from scratch.

Report Layout Data

When a report layout is activated, Data Sourcer begins collecting Solution Reporting information from Stat Server as specified by this layout. More specifically, Data Sourcer, based on report-layout data, forms requests for needed metrics and then sends the requests to Stat Server. Stat Server calculates the requested data and returns it to Data Sourcer according to the time profile specified by the report layout. Data Sourcer gathers the information into special tables.

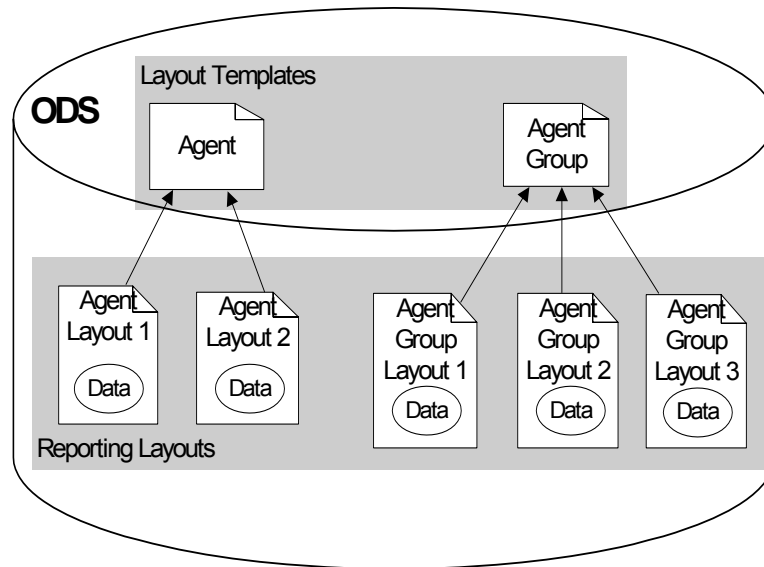


Figure 79: Layouts and Templates

Logically, this data is organized as a three-dimensional array with objects, metrics, and time each claiming a dimension. (Remember, data is collected only from metagroups of objects.) [Figure 80](#) illustrates this concept.

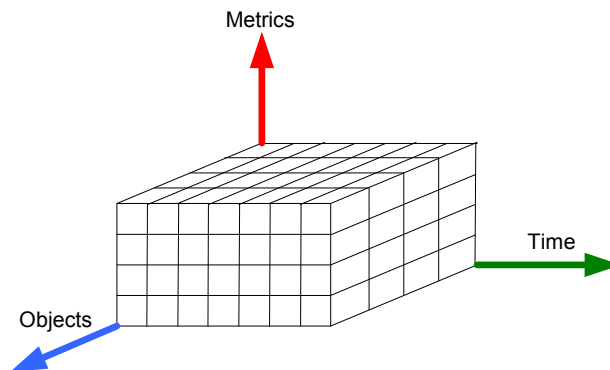


Figure 80: Layout Data Structure

Statistical data is dropped periodically according to layout time profile. For example, the layout might request statistical information every 15 minutes. Statistical data collected and stored for such a period is called a *data chunk*. The new data chunk fills a new layer of the array.

Notice that the data cube might vary in object dimension because objects might appear or leave the contact center at any time during the reporting period. For example, an agent might log in (or log out). This action has a corresponding data stream that is either turned on or off.

The data cube cannot change in the metrics dimension because the set of statistics cannot change (except in custom report layouts).

Using Data Modeling Assistant

Data Modeling Assistant (DMA) is a GUI application that contact center administrators use to define report layouts. These report layouts define the relationships between objects and statistics. This tool also enables administrators to define a *collection time profile*, the interval at which data is drawn from Stat Server.

More specifically, DMA offers the following functionality:

- Import, export, and creation of layout templates
- Import and creation of metrics
- Creation of statistical types
- Creation of custom formulas for statistical categories
- Creation of time profile and time range parameters
- Creation of filters for metrics
- Creation and activation of report layouts based on existing templates or from scratch
- Monitoring of a collection of data in real time

Figure 75 on [page 106](#) shows a sample DMA window.

Collecting Data from Multimedia

Historical Reporting for eServices draws statistical data from Stat Server. Stat Server receives the data, which is stored in the Universal Contact Server database, from Universal Contact Server and Interaction Server. In addition to the objects about which you can also collect telephony data, multimedia data also includes information about Tenant and Staging Area objects.

The Tenant Object

The Tenant object represents the whole contact center and comprises both the e-mail and web media (chat) channels. The information reported about this object includes interactions for each media type; for example, the number of e-mail messages, response times, and so forth.

The Staging Area Object

The Staging Area object represents an interaction queue in which interactions reside during processing. Typical information about the Staging Area object might include e-mail interactions such as the total number of e-mail messages, SMS messages waiting for handling, and so forth.

Data Mart Services

The general configuration of the Data Mart Services and data flow are depicted in [Figure 81](#).

The core component of the Data Mart Services is ETL Runtime—the data-organizing component of Genesys Historical Reporting. ETL Runtime comprises several processes including transformation and loading, aggregation, purging, object tracking, and tenant tracking. ETL Runtime can work with several ODSs simultaneously transferring data from each of them into one Data Mart.

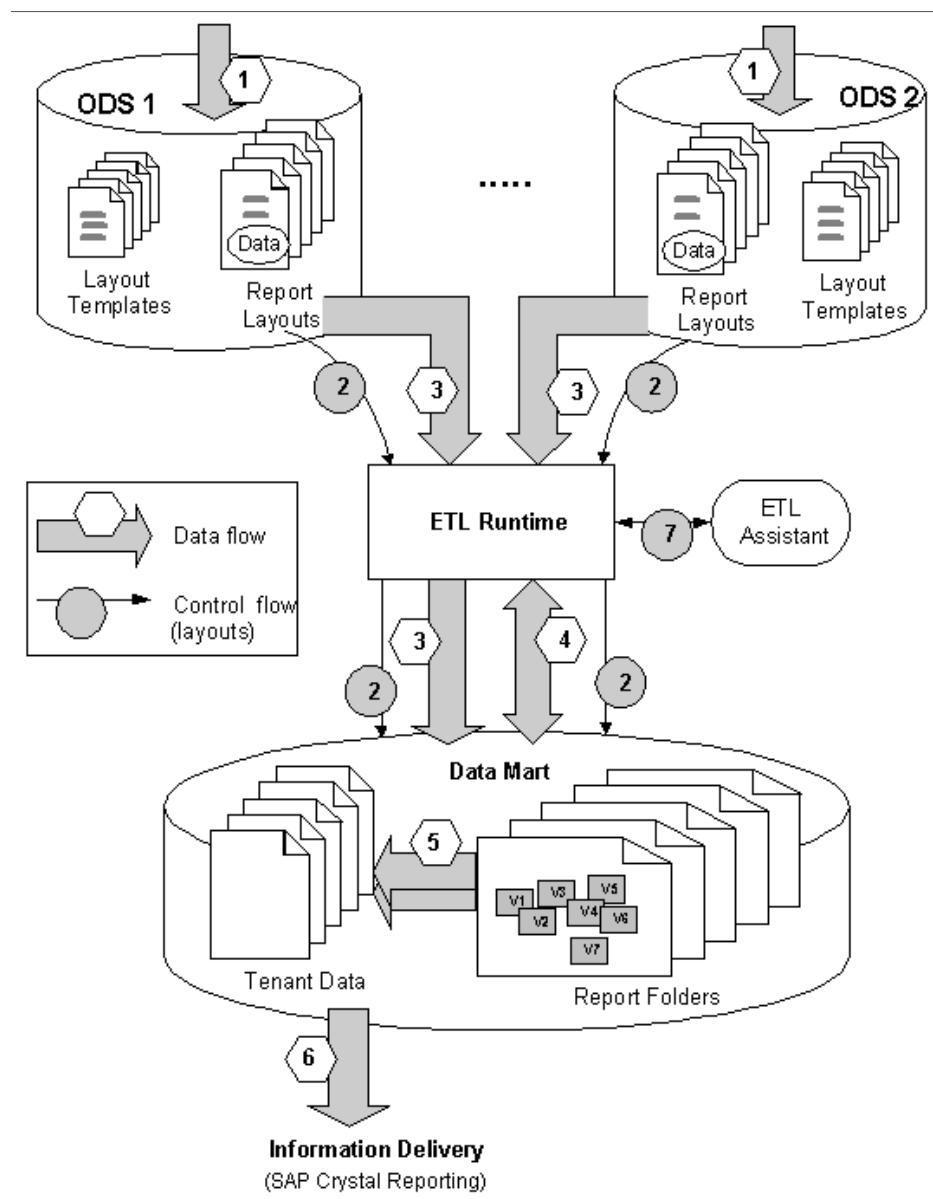


Figure 81: Data Aggregation

The typical data flow scenario illustrated in [Figure 81](#) comprises the following steps:

- 1 Data Sourcer collects raw statistical data and writes it to ODS.
 - 2 Based on active report layouts that ETL Runtime reads from ODSs, ETL Runtime creates report folders in Data Mart. For each report layout, ETL Assistant creates one report folder. Sometimes this process is referred to as loading metadata.
 - 3 ETL Runtime's data-loading process detects data generated after it performed its last load and writes the new data into the appropriate report folders. Raw statistical data is transformed from its initial format into a format suitable for further processing within the Data Mart without manipulating data content. Data is written to a low-level, 15-minute (by default) view. Once data has transferred successfully, ETL's transformation process deletes the data from ODS (if the `dropTransferredTables` parameter is set).
 - 4 ETL Runtime's aggregation process aggregates the data from 15-minute views to higher aggregation levels. Each new level is written as a view to the report folder. By default, the 15-minute level is aggregated to the hour level. Hour-level data is aggregated to the day level and so forth. The aggregation process might run in parallel with the loading and transformation processes.
-
- Note: The default time profiles for multimedia data are hourly and daily.
-
- 5 ETL Runtime's tenant-tracking process searches report folders related to the same tenant and consolidates data from them into one place—Tenant data views. Usually according to predefined purging rules, ETL Runtime purges Data Mart of unneeded data and frees up space for further processing.
 - 6 Information Delivery Services can then retrieve the aggregated and tenant-tracked data.
 - 7 The contact center administrator can monitor Data Mart using ETL Assistant.

Data Loading and Transformation

ETL Runtime uses its loading and transformation process to copy data from ODS sources defined using ETL Assistant to the Data Mart.

The ETL Runtime data-loading process detects new data generated after it performed its last load, creates tables associated with the corresponding report folder, and writes the data into this report folder.

[Figure 82](#) illustrates ETL's process of reading and deleting data from ODS. Here, you see portions of data before (left side) and after (right side) the loading and deleting procedure. On the left side you can see three portions (implemented as tables) of statistical data for one object and one metric. The first two portions are completed; the third portion is incomplete. The ETL

Runtime loading process reads the data and deletes only the two first completed portions, leaving the incomplete one in ODS. If the loading and transformation processes are successful, the completed portions are deleted (when the `dropTransferredTables` parameter has been set).

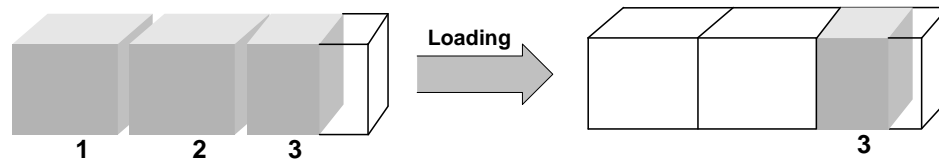


Figure 82: Reading and Deleting Data from ODS

The transformation procedure converts the format of loaded data to a format more suitable for aggregation and retrieval.

Data Aggregation

ETL Runtime's aggregation process derives the data for different aggregation levels. The aggregation levels are presummarized data tables containing data of different aggregation levels. There are seven default aggregation levels:

- no aggregation
- 1 day
- 1 month
- 1 year
- 1 hour
- 1 week
- 1 quarter

Note: Historical Reporting allows partial period aggregations. For example, you can build reports on a partial day. For more detail, refer to the *Reporting 7.6 Reference Manual*.

Figure 83 shows the order in which ETL Runtime aggregates data. Note that day data is used for calculating both month-level and week-level data. Similarly, month-level data is used for building year-level and quarter-level data.

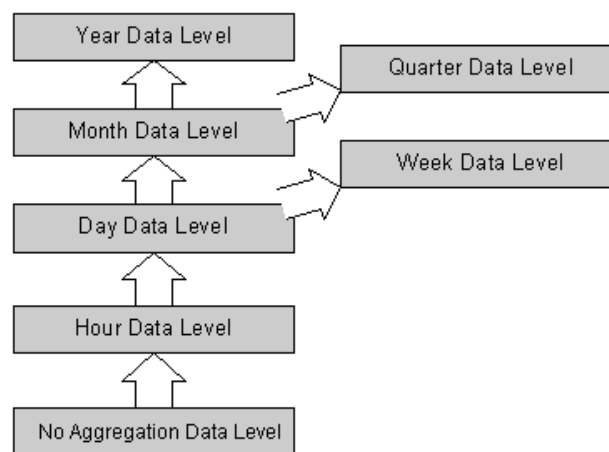


Figure 83: Data Aggregation Levels

Data for each aggregation level is stored in report views within the corresponding report folder. Therefore, by default, a report folder contains seven views corresponding to seven levels of aggregation.

The aggregation procedure uses the corresponding report layout to define the method of calculating aggregated data. [Figure 84](#) illustrates the aggregation of hour-level data from the no-aggregation level to the hour level. The calculation is performed for one object and one metric. The four 15-minute data items shown at the left are 18, 5, 10, and 6. Suppose that a report layout uses a stat type with the Total Time statistical category. The aggregation procedure sums all four numbers to yield 39. As a result, for hour-level aggregation, a new data item equal to 39 is created.

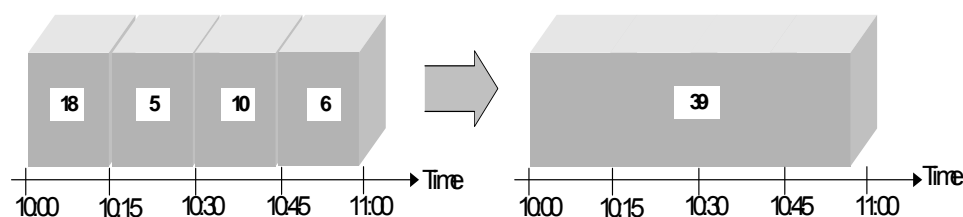


Figure 84: Example of Data Aggregation

If, for example, the stat type uses the MaxTime statistical category, then the result yields 18 since 18 is the maximum of the four numbers.

Working with ETL Assistant

ETL Assistant is a GUI tool that enables contact center managers to observe Data Mart configuration information and browse the available aggregation levels. More specifically, ETL Assistant displays the following configuration parameters:

- Information about configuration servers that have been set up for the Data Mart to collect information from. For instance, for each Configuration Server, you can view the server's ID, name, host name, and port number.
- Information about ODS sources such as their name, database information, user information (username and encrypted password), time zone in which data is to be aggregated, and so forth.

Using ETL Assistant, you can see information about all report folders. For each report folder, you can view the information about its Data Sourcer; corresponding report layout including the name of the report layout; tenant name; time profile; objects (metagroups); and its set of metrics.

Using ETL Assistant, you can browse the report views for all data levels. For each report view, you can view information about database tables, purging parameters, time records comprising the report view, and so forth.

[Figure 85](#) shows an ETL Assistant report view of the hour-level aggregation.

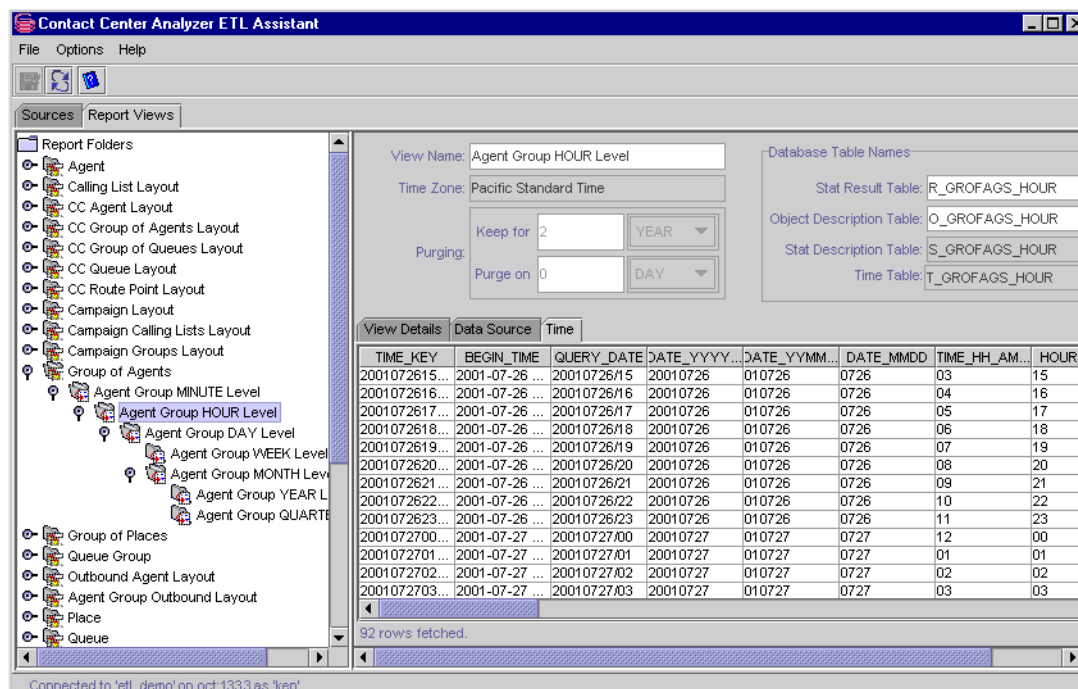


Figure 85: ETL Assistant Report View

Information Delivery Services

Genesys Historical Reporting uses two information delivery methods, CCPulse+ and CC Analyzer, both of which obtain historical data from the Data Collection and Data Mart services.

CCPulse+ With CCPulse+, you can associate real-time and historical statistics and of both create real-time, historical and query based views for most statistics (except Current Status statistics, which have no historical counterpart).

Note: For information on generating and customizing historical and query based views in CCPulse+, refer to the *Reporting 7.5 CCPulse+ Help*.

CC Analyzer CC Analyzer generates only historical reports. For these, Genesys provides SAP Crystal Reports toolset for the report development and distribution. In addition, you can access a set of out-of-box (canned) report templates through the SAP Crystal Reports client tools. These templates are solution-specific for the Genesys Outbound Contact, Genesys Multimedia, SIP IM, and Universal Routing solutions. The *Solution Reporting Templates* book in the *Reporting Technical Reference* series covers just about every aspect of the solution-provided templates.

Crystal Reports—CC Analyzer Report Generation

The SAP Crystal Reports integrates query, analysis, and reporting client tools and an enterprise server solution in a secure, flexible, and scalable environment. The product suite consists of several components, which enable design and delivery of reports via client/server and the Web.

The sections below briefly introduce SAP Crystal Reports and its functionality within Genesys Historical Reporting.

Report Creation and Administration

SAP Crystal Reports delivers query, analysis, and reporting capabilities. Users can use predefined data models or create new data models from database tables for their own use and/or further distribution.

Report Distribution

SAP Crystal Reports displays web reports independent of Server location. It uses relative URLs to share your reports and their associated report objects on any server, in any directory. Each report remains independent of its actual location, because Relative URLs eliminate dependence upon any particular server or virtual directory. With SAP Crystal Reports you need only web-browser like Microsoft Internet Explorer or Mozilla Firefox to discover the content.

Standard Report Repository Reports

The Standard Report Repository includes out-of-box reports for analyzing agent, place, group, queue, and Routing Point status and performance, aggregated over hourly, daily, weekly, monthly, quarterly, and yearly periods.

Agents Status and Performance—Displays the number and type of interactions handled by agents, agent efficiency over time, average number of interactions handled for each communication channel, interaction response time, hold time, after interaction work time, and ratio of customer interactions handled to number of consultations or conference calls.

Queue Management—Indicates the reason interactions failed to connect, network flow for capacity planning, network efficiency over time, downtime trends, and time waiting in queue versus definable thresholds and metrics.

Routing and IVR Performance—Displays calls handled by an IVR versus calls directed to agents via Interaction Router.

Sizing and Scalability

The Data Collection and Data Mart Services make CC Analyzer and CCPulse+ scalable applications for large-volume, multi-site, multi-tenant contact center environments. The Services achieve scalability by relying on industry-standard database management systems and by enabling the distribution of multiple Collection Services. A large contact center might require installation of multiple data collection units. This section discusses how to calculate the size database you require for ODS and Data Mart. It also provides guidelines for distributing data collection processing.

Estimating ODS Size

Genesys recommends reserving enough space in the ODS database for at least two additional days of data collection in the event data is not removed from the ODS as anticipated. An appropriate ODS size depends on the number of requests, time profiles, request record size, and how often the database is cleared.

Use the following formula to estimate minimum ODS size:

$$ODSSize = NRequests \times NTimesPerDay \times RequestsRecordSize \times (NDays + 2)$$

where:

ODSSize is the size of the Operational Data Storage in bytes.

NRequests is the number of requests made to Stat Server.

NTimesPerDay is the number of Collection Time Profiles per day.

RequestsRecordSize is the request record length in bytes.

NDays is the number of days data is stored in the ODS.

Data Sourcer stores the data it requests from Stat Server in OL_DATA*n* tables in ODS. This table's record length depends on your relational database management system and its storage parameters. [Table 4](#) provides record length estimates for the supported RDBMSs. The actual record length in your OL_DATA*n* tables might differ.

Table 4: Estimated Length of Request Records by RDBMS

| | Microsoft SQL | Oracle | DB2 | Sybase |
|---------------|---------------|----------|----------|----------|
| Record length | 66 bytes | 42 bytes | 58 bytes | 83 bytes |

You can calculate the number of requests made to Stat Server as follows:

$$NRequests = \sum_{i=1}^{NLayouts} NObjects_i \times NStatistics_i$$

where:

NObjects is the number of objects in your report layout.

NStatistics is the number of statistics collected by each report layout.

NLayouts is the number of active report layouts in Data Sourcer.

Note: DMA shows the number of requests for all active report layouts in the status bar when the topmost report folder (the default name is Report Layouts) is selected in the folder pane. DMA displays the total number of statistics for a particular report layout when that report layout is selected in the folder pane.

Example

Assume the following: 100,000 requests, a 15-minute time profile, an Oracle RDBMS, and ODS is cleared once daily.

- $NRequests = 100,000$
- $NTimesPerDay = 4 \text{ collections/1 hr} \times 24 \text{ hrs/day} = 96 \text{ collections/day}$
- $NDays = 1$

An appropriate database size for this scenario is ~1.2 GB ($100,000 \times 96 \times 42 \times [1+2]$). And it would be a good idea to factor in some extra space.

Calculating the Number of Requests

Genesys Outbound Contact, Enterprise Routing (Inbound), and Multimedia use the solution-specific layout templates listed in [Table 5](#). You can use these templates as starting points for creating report layouts that measure the status and performance of certain object types. The table also shows the number of statistics collected.

Refer to the “ODS Layout Templates” chapter of the *Reporting Technical Reference Solution Reporting Templates* book in the RTRG series for more information about the statistics gathered.

Table 5: Solution Layout Templates

| Outbound Contact Layout Templates | | Enterprise Routing Layout Templates | | eServices Layout Templates | |
|-----------------------------------|--------------------------------|-------------------------------------|--------------------------------|----------------------------|--------------------------------|
| Template Name | Number of Statistics Collected | Template Name | Number of Statistics Collected | Template Name | Number of Statistics Collected |
| CALL_LS | 24 | AGENT | 28 | ERMS | |
| CMP | 25 | GROFAGS | 28 | EMAIL_AGENT | 11 |
| CMP_CALL_L | 24 | GROFPLS | 28 | EMAIL_GAGENT | 11 |
| CMP_GR | 7 | GROQUEUES | 11 | EMAIL_GPLACE | 11 |
| GROFPLS | 28 | PLACE | 28 | EMAIL_IQUEUE* | 5 |
| GROFQUEUES | 11 | QUEUE | 11 | EMAIL_PLACE | 11 |
| O_AGENT | 32 | ROUTEPOINT | 11 | EMAIL_TENANT* | 11 |
| O_AGENT_GR | 32 | | | Web Media | |
| PLACE | 28 | | | CHAT_A | 6** |
| QUEUE | 11 | | | CHAT_GA | 6** |
| ROUTEPOINT | 11 | | | CHAT_GH* | 7 |
| | | | | CHAT_GP | 6** |
| | | | | CHAT_P | 6** |
| | | | | Voice | |
| | | | | VOICE_A | 22 |
| | | | | VOICE_AG | 22 |
| | | | | VOICE_GQ | 12 |
| | | | | VOICE_P | 22 |
| | | | | VOICE_PG | 22 |
| | | | | VOICE_Q | 12 |
| | | | | VOICE_RP | 12 |

Note: The layout template names followed by an asterisk (*) contain metrics which are sourced from a Stat Server Java Extension.

The number of statistics for some web media (chat) layout templates is followed by two asterisks (**). This indicates that the template includes additional metrics that are reserved for future use. The number listed in the table represents the number of active statistics.

Use the following formula to calculate the number of requests generated for an ODS containing all seven layout templates for Enterprise Routing:

$$NRequests = (NAGENTS \times 28) + (NGROFAGSs \times 28) + (NPLACEs \times 28) + (NGROFPLS \times 28) + (NQUEUEs \times 11) + (NROUTEPOINTS \times 11) + (NGROFQUEUES \times 11)$$

Example

Consider the following sample environment:

Tenant 1

1,000 Agents
50 Agent Groups
500 Places
25 Place Groups
10 Queues
20 Routing Points

5 Queue Groups
15-min Time Profile
(NTimesPerDay=96)
Oracle RDBMS
ODS cleared once daily

Tenant 2

2,000 Agents
100 Agent Groups
500 Places
25 Place Groups
10 Queues
100 Routing Points

5 Queue Groups
15-min Time Profile
(NTimesPerDay=96)
Oracle RDBMS
ODS cleared once daily

Using these figures in the equations above, you calculate *NRequests* and *ODSSize* as follows:

$$\begin{aligned} NRequests &= [(1000 \times 28) + (50 \times 28) + (500 \times 28) + (25 \times 28) + (10 \times 11) \\ &\quad + (20 \times 11) + (5 \times 11)] + \\ &\quad [(2000 \times 28) + (100 \times 28) + (500 \times 28) + (25 \times 28) + (10 \times 11) \\ &\quad + (100 \times 11) + (5 \times 11)] \\ &= 44,485 + 74,765 \\ &= 119,250 \\ ODSSize &= 119,250 \times 96 \times 42 \times (1 + 2) \\ &= \sim 1.4 \text{ GB} \end{aligned}$$

Estimating Data Mart Size

The appropriate size for Data Mart depends on the number of objects stored, number of statistics gathered, and how long data is kept. This database is much larger than ODS because:

- It maintains a much longer history of contact center statistics; typically, it stores statistics for one year.

- Presummarized data is generated for several aggregation levels to improve reporting performance.

To calculate the Data Mart size, you must find the raw data size and then factor in whatever amount of overhead is appropriate for your enterprise. Steps for calculating the minimum size for the Data Mart appear in the next section.

Note: The size Data Mart you require depends on how much overhead—space required for such things as indexes and metadata—your enterprise chooses to add to the basic raw data size. The overhead size is a highly variable parameter.

As a guideline, note that in addition to storage requirements for raw data, you must also store three default indexes:

- One composite index for the Fact table on the Object and Time foreign keys.
- Two indexes, one each on the primary key indexes for the Dimension tables.

These three indexes and the two Dimension tables consume approximately one-third again as much space, so the total minimum space required for the Data Mart is calculated as follows:

$$DMSize = RawDataSize \times 1.33$$

Note: If you are using Genesys Info Mart, refer to the “Genesys Info Mart” section of the *Genesys Hardware Sizing Guide* for information on sizing estimates for your Info Mart.

Calculating Data Mart Size

Calculating the raw data size requires that you first calculate the number of aggregations you are using, and then use this figure in the equation for raw data size.

Calculating Number of Aggregations

Each report layout star schema contains two Dimension tables (Object and Time) and one Fact table for each aggregation level. Fact tables affect database size more than do Dimension tables. All Fact tables hold the number of aggregation periods maintained for each aggregation level.

For example, at the 15-minute level Data Mart maintains 35,040 aggregation periods for a one-year period (365 days x 24 hours/day x 4 aggregations/hour), while at the one-year level, it maintains just one aggregation period.

The total of the aggregation periods can be represented as follows:

$$TotalAggs = \sum_{i=1}^{NLevels} NAggregations_i$$

Calculate the total number of aggregations for the seven default aggregation levels as follows:

$$TotalAggs = 35040 + 8760 + 365 + 52 + 12 + 4 + 1 = 44234$$

Calculating Raw Data Size

For each report layout schema:

- The number of objects multiplied by the total number of aggregation periods translates into the number of rows.
- The number of statistics translates into the number of columns.

In addition, two keys in each row, the Object and Time foreign keys, point to the Dimension tables. Each statistic and the two keys take 4 bytes of space.

To calculate the total size of the raw data in the Data Mart, sum the star schema sizes for each report layout:

$$RawDataSize = TotalAggs \sum_{j=1}^{NLayouts} NObjects_j \times \langle \langle NStatistics_j \times 4 \rangle + \eta \rangle$$

where η is the size of the row key (size of the TIME_KEY and OBJECT_ID fields).

Example

To calculate Data Mart size, assume the following:

- The Data Mart is loaded daily.
- You are using the default aggregation levels.
- You are maintaining a one-year history in the Data Mart.

Tenant characteristics are as follows:

| Tenant 1 | Tenant 2 |
|--------------------------|--------------------------|
| 1,000 agents | 2,000 agents |
| 50 agent groups | 100 agent groups |
| 500 places | 500 places |
| 25 place groups | 25 place groups |
| 10 queues | 10 queues |
| 20 Routing Points | 100 Routing Points |
| 5 queue groups | 5 queue groups |
| Oracle row-key size = 30 | Oracle row-key size = 30 |

As shown above, the equation is as follows:

$$RawDataSize = TotalAggs \sum_{j=1}^{NLayouts} NObjects_j \times \langle \langle NStatistics_j \times 4 \rangle + \eta \rangle$$

You must perform the calculation separately for each layout, using the correct number of objects and number of statistics for each layout. Add these results together to obtain the raw data size.

Total Aggs = 44234
(See the calculation in
“Calculating Number of Aggregations” on [page 124](#).)

NLayouts = 7 (Agent, Agent Group, Place, Place Group, Queue,
Queue Group, Routing Point)

NObjects_j 3000 agents, 150 agent groups, 1000 places, 50 place groups
20 queues, 120 Routing Points, and 10 queue groups.

NStatistics_j The number of statistics for each layout as shown in
Table 5 on [page 122](#).)

η = 30 (Row key size)

Using these figures, the raw data size comes to 25.02664458 GB.

Minimum recommended Data Mart size is as follows:

Raw Data Size x 1.33 = 25.02664458 x 1.33 = 33.28543729 GB

Example—Alternative Calculation of Data Mart Size

You can also calculate the minimum Data Mart size as follows:

$$DMSize = (NRequests \times NTimesPerDay \times NDays \times 8) + 20,000$$

where:

- *DMSize* is the size of the Data Mart in bytes.
- *NRequests* is the total number of requests from all Data Sourcers connected to the Data Mart.
- *NTimesPerDay* is the number of Collection Time Profiles per day.
- *NDays* is the number of days data is stored in the Data Mart.

Using the same number and types of objects as in the previous example, this is calculated as:

$$DMSize = (119,250 \times 96 \times 365 \times 8) + 20,000 = 33,428,180,000 \text{ bytes}$$

To convert the answer to GB, divide by 1073741824. This gives an appropriate database size for this scenario of ~32 GB. And it would be a good idea to factor in some extra space.

Note: $NRequests = [(1,000 \times 28) + (50 \times 28) + (500 \times 28) + (25 \times 28) + (10 \times 11) + (20 \times 11) + (5 \times 11)] + [(2,000 \times 28) + (100 \times 28) + (500 \times 28) + (25 \times 28) + (10 \times 11) + (100 \times 11) + (5 \times 11)]$
 $= 44,485 + 74,765$
 $= 119,250$

Distributed Architecture

In estimating database- and hardware-sizing requirements, first determine the implementation architecture for the Data Collection Services. In most cases, a centralized configuration easily accommodates interaction volume. For large volumes—more than 30 interactions per second—Genesys recommends a distributed configuration.

Note: If you are using Genesys Multimedia, contact Genesys Technical Support for assistance in determining the correct number of multimedia collection units.

Calculating Number of Collection Units

Because Stat Server tracks and maintains statistics in memory, it can only handle a certain number of statistics. This limitation depends on interaction volume, DBMS throughput, CPU speed, and available memory. To scale beyond these limitations, distribute the monitoring and collection of statistics across multiple collection units.

Determining how many collection units to configure requires site-specific information on contact center volume, interaction complexity, and hardware and software environments. In general, configure one collection unit for every contact center or every tenant in a multi-contact center or multi-tenant environment. For a more precise determination of initial distribution, use the following procedure.

Note: The following procedure is only a guideline because accurate scaling of collection units requires ongoing monitoring and tuning.

1. Determine the number of calls per second each T-Server handles in the virtual contact center.
2. Organize the T-Servers into groups whose total volume adds up to approximately 30 contacts per second:

$$\text{GroupCV} \leq 30$$
3. For each group of T-Servers, calculate the number of requests for all report layouts associated with each T-Server:

$$\text{NRequests} = \sum_{i=1}^{\text{NLayouts}} \text{NObjects}_i \times \text{NStatistics}_i$$

4. Calculate the number of collection units for each T-Server Group by multiplying its number of requests by its total call volume. Then divide the result by the product of the tested limits for call volume per second and requests for the hardware on which the collection unit will run:

$$NCollectionUnits = \frac{NRequests_T \times GroupCV}{CVMax \times NRequests_H}$$

5. Add the sum of collection units for each T-Server group to get the total number of collection units:

$$TotalCollectionUnits = \sum_{i=1}^{NGroups} NCollectionUnits_i$$

6. In case of fractional results, round up the number of collection units as a cushion for increasing volumes.

Note: The MaxRequestsPerCollectionUnit figure is based on both the performance of Stat Server and Data Sourcer, which, in turn, is based on a number of factors including disk space, and memory to mention a few. Refer to “Stat Server Performance” and “Data Sourcer Performance” in the “Performance Measurements” chapter of the *Reporting Reference Manual* for more information.

Example

Adding to the previous example (see “Example” on [page 121](#)), Tenant 1 is serviced out of two equal-sized contact centers, each with a T-Server handling contact volume of approximately 10 contacts per second. Tenant 2 is also serviced out of two equal-sized sites, each with a T-Server handling 20 contacts per second. The total contact volume is 60 contacts per second, which would overload a single collection unit.

This example assumes Windows NT Servers with Pentium 400 processors and 256 MB RAM, which tests have shown to handle:

- Approximately 30 contacts per second.
- Approximately 50,000 requests.

These numbers depend heavily on call complexity, which can vary widely. The tests used contacts of average complexity (for example, few transfers, conferences, typical amounts of attached data, and so forth).

Tenant 1 (each Contact Center)

| | |
|-------------------|------------------------|
| 500 Agents | 5 Queue Groups |
| 25 Agent Groups | 15-min Time Profile |
| 250 Places | 70-bit record size |
| 12 Place Groups | 2 T-Servers |
| 5 Queues | 10 contacts per second |
| 10 Routing Points | |

Tenant 2 (each Contact Center)

| | |
|-------------------|------------------------|
| 1,000 Agents | 5 Queue Groups |
| 50 Agent Groups | 15-min Time Profile |
| 250 Places | 70-bit record size |
| 12 Place Groups | 2 T-Servers |
| 25 Queues | 20 contacts per second |
| 50 Routing Points | |

In making the collection unit calculation, you could distribute four collection units, one each to the four sites. However, you can optimize the distribution by following the process just described:

1. The T-Server contact volumes are:
 - T-Server1, 10 contacts per second.
 - T-Server2, 10 contacts per second.
 - T-Server3, 20 contacts per second.
 - T-Server4, 20 contacts per second.
2. You can pair each Tenant 1 site with a Tenant 2 site:
 - T-Server1 + T-Server3, 30 contacts per second
 - T-Server2 + T-Server4, 30 contacts per second
3. Since each of the paired sites has the same characteristics, the number of requests is the same for each:
 - NRequests

$$\begin{aligned}
 &= [(500 \times 28) + (25 \times 28) + (250 \times 28) + (12 \times 28) + (5 \times 11) + \\
 &\quad (10 \times 11) + (5 \times 11)] + \\
 &\quad [(1000 \times 28) + (50 \times 28) + (250 \times 28) + (12 \times 28) + (25 \times 11) \\
 &\quad + (50 \times 11) + (5 \times 11)] \\
 &= 22,256 + 37,616 = 59,872
 \end{aligned}$$
4. The number of collection units for each T-Server group is:

$$NCollectionUnits = \frac{59872 \times 30}{1500000} = 1.2$$
5. The total number of collection units for the two T-Server groups is:

$$TotalCollectionUnits = 1.2 + 1.2 = 2.4$$

If 2.4 is rounded up, you would distribute three collection units. In this case, instead of the two pairs of sites above, you could, alternatively, configure one collection unit for Tenant 1's two sites and one each for Tenant 2's two sites.



Appendix

Acronym List

This appendix provides the meaning of the acronyms used in this document.

| Acronym | Meaning |
|---------|---|
| ACD | Automatic Call Distribution |
| ACW | After-call Work |
| AHT | Average Handling Time |
| ANI | Automatic Number Identification |
| ASA | Average speed of answer |
| ASAP | As soon as possible |
| AWT | Actual Waiting Time |
| ANI | Automatic Number Identification |
| CCA | Genesys Contact Center Analyzer |
| CIM | Customer Interaction Management |
| CPD | Call Progress Detection |
| CTI | Computer-Telephony Integration |
| DCID | Distinguish by Connection ID |
| DMA | Data Modeling Assistant |
| DN | Directory Number |
| DNIS | Directory Number Information Service |
| ERS | Enterprise Routing Solution |
| ETL | Extraction, Transformation, and Loading |

| Acronym | Meaning |
|---------|---------------------------------|
| EWT | Estimated Waiting Time |
| GIM | Genesys Info Mart |
| GUI | Graphical User Interface |
| ICON | Interaction Concentrator |
| ICS | Internet Contact Solution |
| IDB | Interaction Database |
| IVR | Interactive Voice Response |
| Ixn | Interaction |
| OCS | Outbound Contact Solution |
| ODS | Operational Data Storage |
| PBX | Private Branch eXchange |
| PSTN | Public Switch Telephone Network |
| SDK | Software Developer Kit |
| SMS | Short Message Service |
| SIP | Session Initiation Protocol |
| SSJE | Stat Server Java Extension |
| UCS | Universal Contact Server |
| UML | Unified Modeling Language |
| URS | Universal Routing Server |
| VoIP | Voice over Internet Protocol |
| WCB | Web Callback |



Supplements

Related Documentation Resources

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

Reporting

- The *Reporting 7.6 Deployment Guide*, which provides step-by-step instructions for configuring and installing the Reporting components.
- The *Reporting 7.6 Reference Manual*, which provides general information about performance measurements, how Reporting behaves during time shifts, and how to set up custom reports for skills-based and partial-period reporting.
- The *Reporting 7.5 CCPulse+ Help*, which contains detailed instructions for using CCPulse+ features and functions.
- The *Reporting 7.5 CCPulse+ Administrator's Guide*, which presents information on customizing and troubleshooting your CCPulse+ application. It also includes tables showing which historical statistics link with which real-time statistics for all statistics included in the solution templates.
- The *Reporting 7.6 Data Sourcer User's Guide*, which describes the role Data Sourcer plays in your Reporting environment and includes the Configuration Server objects Data Sourcer tracks, how it organizes data, and how to fine-tune configuration and troubleshoot problems.
- The *Reporting 7.6 Data Modeling Assistant Help*, which explains how to import and export templates, create new statistical parameters, and create new layout templates and report layouts.
- The *Reporting 7.6 ETL Assistant Help*, which describes how ETL Assistant manages metadata in the Data Mart and allows you to view information about the results of data transformation and aggregation from different sources.

- The *Reporting 7.6 ETL Runtime User's Guide*, which describes the role that ETL Runtime plays in your Reporting environment. It includes a discussion of ETL Runtime's modules, the runtime parameters, options you can set to fine-tune configuration, and how to schedule ETL Runtime processes.

T-Server

- The *Genesys Events and Models Reference Manual* and the *T-Library SDK 7.2 C Developer's Guide*, which provide detailed information on T-Server features and functions.

Framework

- The *Framework Stat Server User's Guide*, which describes Stat Server architecture and functions, configuration steps and options, installation procedures, and statistical definitions and formulas.

Genesys

- The *Reporting Technical Reference Guide for the Genesys 7.2 Release* (the predecessor to this document).
- The *Genesys Technical Publications Glossary*, which ships on the Genesys Documentation Library DVD and which provides a comprehensive list of the Genesys and computer-telephony integration (CTI) terminology and acronyms used in this document.
- The *Genesys Migration Guide*, which ships on the Genesys Documentation Library DVD, and which provides documented migration strategies for Genesys product releases. Contact Genesys Technical Support for more information.
- The Release Notes and Product Advisories for this product, which are available on the Genesys Technical Support website at <http://genesyslab.com/support>.

Information about supported hardware and third-party software is available on the Genesys Technical Support website in the following documents:

- [Genesys Supported Operating Environment Reference Manual](#)
- [Genesys Supported Media Interfaces Reference Manual](#)

Consult these additional resources as necessary:

- The *Genesys Hardware Sizing Guide*, which provides information about Genesys hardware sizing guidelines for the Genesys 8.x releases.

- The *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.
- The *Genesys Database Sizing Estimator 7.6 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, accessible from the [system level documents by release](#) tab in the Knowledge Base Browse Documents Section.

Genesys product documentation is available on the:

- Genesys Technical Support website at <http://genesyslab.com/support>.
- Genesys Documentation Library DVD, which you can order by e-mail from Genesys Order Management at orderman@genesyslab.com.

Document Conventions

This document uses certain stylistic and typographical conventions—introduced here—that serve as shorthands for particular kinds of information.

Document Version Number

A version number appears at the bottom of the inside front cover of this document. Version numbers change as new information is added to this document. Here is a sample version number:

76trr_overview_08-2012_v7.6.001.00

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, might 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.

Universal Model Language

Statechart formalism, part of Universal Model Language, graphically represents the state machine in this figure. Statecharts are convenient for representing objects that can be created or destroyed. For instance, a black circle indicates that the object does not yet exist. A black circle enclosed within a hollow circle indicates that the object no longer exists. Rounded rectangles indicate object existence. For a full description of UML, see the current UML specification.

Type Styles

[Table 6](#) describes and illustrates the type conventions that are used in this document.

Table 6: Type Styles

| Type Style | Used For | Examples |
|--|--|---|
| Italic | <ul style="list-style-type: none"> Document titles Emphasis Definitions of (or first references to) unfamiliar terms Mathematical variables <p>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 138).</p> | <p>Please consult the <i>Genesys Migration Guide</i> for more information.</p> <p>Do <i>not</i> use this value for this option.</p> <p>A <i>customary and usual</i> practice is one that is widely accepted and used within a particular industry or profession.</p> <p>The formula, $x + 1 = 7$ where x stands for . . .</p> |
| Monospace font (Looks like teletype or typewriter text) | <p>All programming identifiers and GUI elements. This convention includes:</p> <ul style="list-style-type: none"> The <i>names</i> 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. <p>Also used for any text that users must manually enter during a configuration or installation procedure, or on a command line.</p> | <p>Select the Show variables on screen check box.</p> <p>In the Operand text box, enter your formula.</p> <p>Click OK to exit the Properties dialog box.</p> <p>T-Server distributes the error messages in EventError events.</p> <p>If you select true for the inbound-bsns-calls option, all established inbound calls on a local agent are considered business calls.</p> <p>Enter exit on the command line.</p> |
| Square brackets ([]) | <p>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.</p> | <pre>smcp_server -host [flags]</pre> |

Table 6: Type Styles (Continued)

| Type Style | Used For | Examples |
|----------------------|---|---|
| Angle brackets (< >) | <p>A placeholder for a value that the user must specify. This might be a DN or a port number specific to your enterprise.</p> <p>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.</p> | <code>smcp_server -host <confighost></code> |



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