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Contact Center Advisor and Workforce Advisor Administrator User's Guide

Metric Manager

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Metric Manager

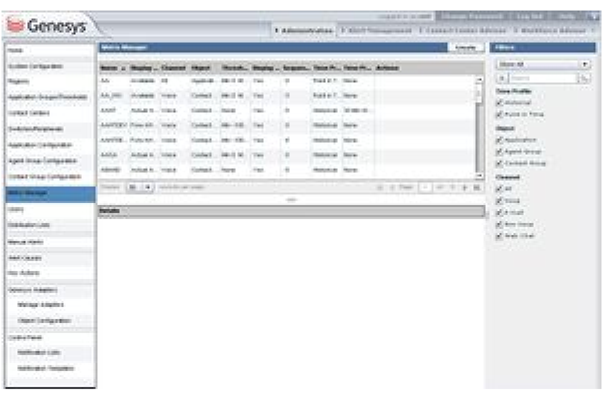
Use the Metric Manager link on the Administration module navigation pane to access the metrics management and configuration page. Access to metrics must be configured by an administrator in Genesys Configuration Manager. Data relating to or dependent on metrics to which a user does not have access permissions does not display for that user.

Metric Manager Overview

You can view and edit all Contact Center Advisor and Workforce Advisor metrics in the Metric Manager. You can customize the set of standard metrics that ship with Performance Management Advisors to address your specific Contact Center performance and service quality measurements. You can also use the Metric Manager to create custom metrics for the dashboard.

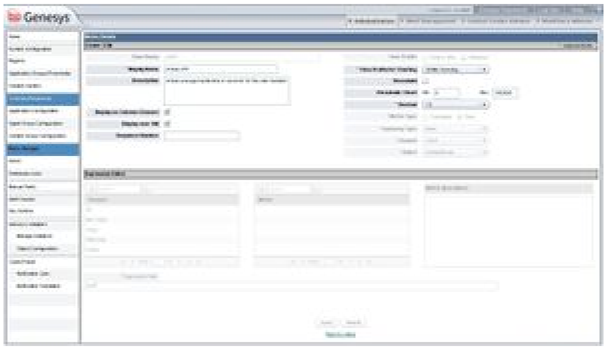
> **Important**
>
> You can create only custom application metrics. You cannot create agent group or contact group metrics.

The elements of formulas for custom application metrics are limited to existing standard or custom source metrics provided by the Genesys Adapter, source metrics imported from the CISCO environment, and existing CCA application dashboard metrics. The Metric Manager page displays only the metrics to which you have Read permission in the Configuration Server. The following screenshot shows the Metric Manager page in the Administration module.



Metric Manager page

The following screenshot shows the Metric Details page. Use the Metric Details page to edit or customize a selected metric.


Metric Details page

The display attributes of all metrics, including standard metrics (metrics that ship with Advisors), can be edited in the Metric Manager. There are limitations on what you can edit for a standard metric. For more information, see Descriptions of Metric Properties on the Metric Details Page. Any changes that you make using the Metric Manager are logged in the audit log file, similar to all other logged administrative actions.

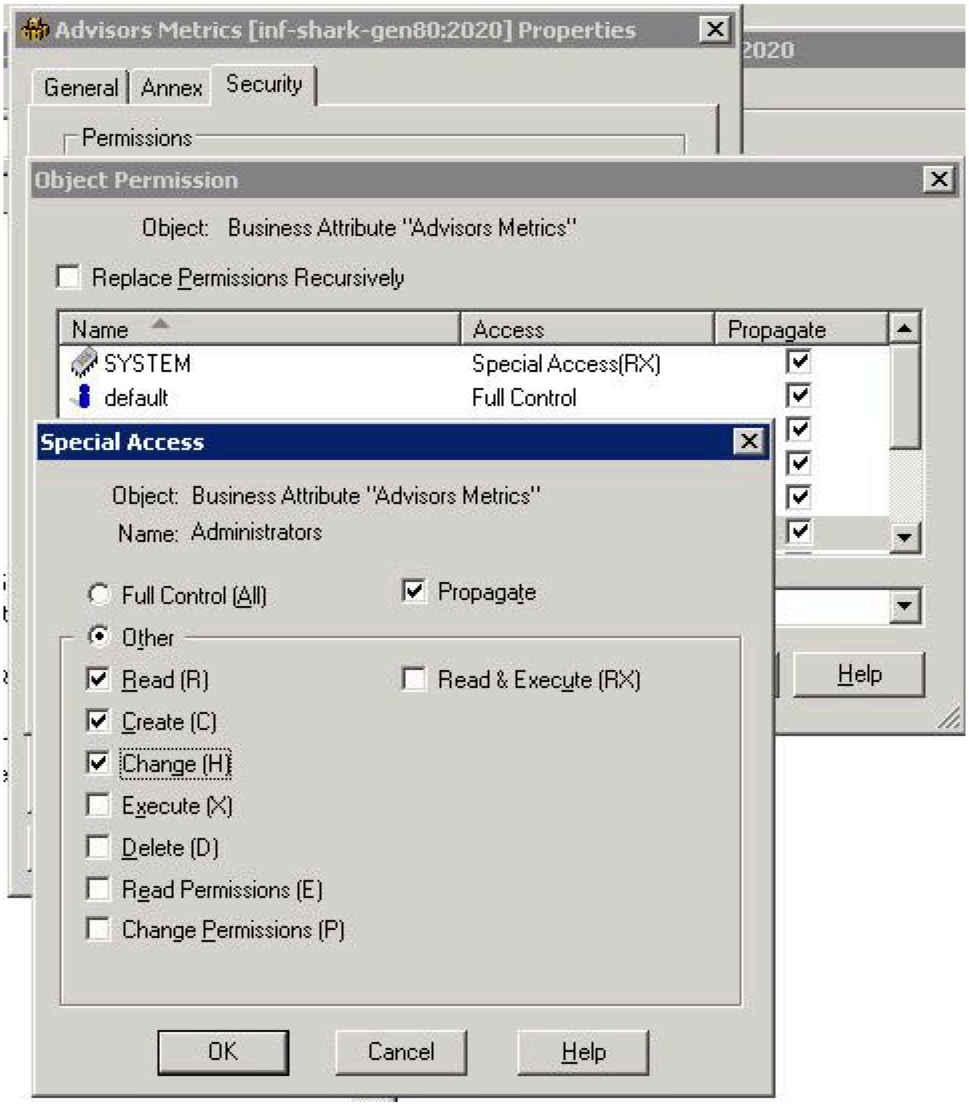
Important

Frontline Advisor metrics do not display in the Metric Manager.

Role Based Access Control and the Metric Manager

The Metric Manager functionality is controlled by privileges and permissions (Role-Based Access Control). A privilege determines the actions a user can perform. A permission grants or denies viewing of individual metrics for a user. In the Metric Manager, the view, create, copy, edit, and delete actions are individually controlled by privileges. For information about the Metric Manager–specific privileges, see Advisors Privileges. Use the following information if you are granting or denying Metric Manager–related permissions and privileges to users:

- A user can view all the metrics to which he or she has a "read" object permission.
- A user who can create a custom metric can also view and delete that metric, unless view permission or the change permission to the metric was explicitly denied in the Configuration Server after the user created the metric.
- To create custom metrics, a user must have a Create security permission granted on the Advisors Metrics Business Attributes section in Configuration Manager. Without this permission, the user cannot create custom metrics. Similarly, a Change permission must be granted at the root attribute level or at the individual metric attribute value level to ensure the user can delete an existing custom metric. For an example of this configuration, see the following screenshot..



Security Settings in Configuration Manager for Metric Manager Users

Using Metric Manager

You can create custom application metrics using the Metric Manager. To create a custom metric, you must provide an expression for the metric (that is, a formula that produces a metric value). Expressions can contain other metrics and constants (numbers) as operands, as well as the operators, functions, constructs, and symbols described in the following Table.

Metric Type	Acceptable Operands
Raw custom point-in-time and calculated dashboard custom metrics	Arithmetic operators: • + (addition)

Metric Type	Acceptable Operands
	• – (subtraction) • * (multiplication) • / (division) Brackets (to ensure the required operation sequence)
Calculated dashboard custom metrics	In addition to the above, the >, < , and = operators can be used.

Viewing Information about a Metric

Prerequisites

- You require the privilege that grants you access to the Administration Module and the privilege that grants you access to the Metric Manager to perform this procedure.
- You require permission to view at least one metric.
  The Metric Manager page displays only the metrics to which you have Read permission in the Configuration Server.

Start Procedure

1. From the Administration Module, navigate to the Metric Manager.
2. Locate the metric for which you want to view detailed information.
   To assist you when searching for a specific metric, use the filters on the right side of the page to reduce the number of metrics that display. By default, all filters are selected.
   Use the page navigation arrows under the list of metrics to move between pages of metrics. By default, the metrics are displayed in alphabetical order.
3. Click the metric on the Metric Manager page to select the metric.
   Details about the metric display at the bottom of the Metric Manager page.

Creating a Custom Metric

Prerequisites

- You require the privilege that grants you access to the Administration Module and the privilege that grants you access to the Metric Manager to perform this procedure.
- You require the Create permission in the Configuration Server (see Role Based Access Control and the Metric Manager) for the Advisors Metrics Business Attribute on the default tenant.
- You require the privilege that grants you access to the Create button.

Start Procedure

1. From the Administration Module, navigate to the Metric Manager.
2. Click Create.
   The Metric Details page opens.
3. Enter information to define the new metric. Ensure you enter information into all required fields.
   For descriptions of the metric properties, see Descriptions of Metric Properties on the Metric Details Page.
4. If you want to return the Metric Details page to the default settings, click Reset.
5. Click Save to save the metric.
   If you entered all information correctly, the page returns to the Metric Manager page. The new metric displays in the list of metrics.

Copying a Metric to Create a Custom Metric

Prerequisites

- You require the privilege that grants you access to the Administration Module and the privilege that grants you access to the Metric Manager to perform this procedure.
- You require the Create permission in the Configuration Server (see Role Based Access Control and the Metric Manager) for the Advisors Metrics Business Attribute on the default tenant.
- You require permission to view the metric that you want to copy.
- You require the privilege that grants you access to the Save as option.

Start Procedure

1. From the Administration Module, navigate to the Metric Manager.
2. Select the custom or standard metric that you want to use as a template for a new custom metric.
   You can use only application metrics as templates for new custom metrics. If you select a standard dashboard metric as a template for a new custom metric, the expression of the original standard metric may not be supported in the new custom metric. You must edit the calculation to limit operands to those supported by the custom dashboard metric creation process.
3. Click the Save as... option.
   The Metric Details page opens.
4. Edit information to define the new metric. Ensure you enter a new display name for the new custom metric. Ensure you enter information into all required fields.
   For descriptions of the metric properties, see Descriptions of Metric Properties on the Metric Details Page.
5. Click Save to save the metric.
   If you entered all information correctly, the page returns to the Metric Manager page. The new metric displays in the list of metrics.

Editing a Metric

You cannot edit the short name for a metric (this includes custom metrics).

Prerequisites

- You require the privilege that grants you access to the Administration Module and the privilege that grants you access to the Metric Manager to perform this procedure.
- You require permission to view the metric that you want to edit.
- You require the privilege that grants you access to the Edit option.

Important

You require the AdvisorsAdministration.MMW.canEdit privilege to edit metrics, but a Change permission is not required in the Configuration Server for the metric business attribute value because none of the edited information is updated on the Configuration Server after the initial creation of the business attribute value.

Start Procedure

1. From the Administration Module, navigate to the Metric Manager.
2. Select an existing metric to edit.
3. Click Edit.
   The Metric Details page opens.
4. Edit the metric properties.
   The metric properties you can edit are dependent on the type of metric you selected to edit. Your ability to edit standard (out-of-the-box) metrics is limited. For example, the expression editor is always disabled for standard metrics. If you want to edit a standard metric, you must copy the metric and save it as a new custom metric.
   If you change the display name or description of a metric, the information is updated in Advisors only and is not propagated to the Configuration Server.
5. Click Save to save the metric.
   If you entered all information correctly, the page returns to the Metric Manager page. The metric displays in the list of metrics.

Deleting a Metric

Prerequisites

- You require the privilege that grants you access to the Administration Module and the privilege that grants you access to the Metric Manager to perform this procedure.
- You require permission to view the metric that you want to delete.

- You require a Change permission in the Configuration Server (see Role Based Access Control and the Metric Manager) for the business attribute that represents the metric that you are deleting.
- You require the privilege that grants you access to the Delete option.

> **Important**
> Deleting a custom metric deletes the record in Advisors and also deletes the business attribute value under the Advisors Metrics Business Attributes section in the Configuration Server.

Start Procedure

1. From the Administration Module, navigate to the Metric Manager.
2. Select a metric to delete.
3. Click Delete.
   If a raw dashboard metric is used in a calculation for a calculated dashboard metric, you cannot delete that raw dashboard metric. If you attempt to delete a metric that is used in another metric calculation, Advisors displays a message that indicates which dashboard metric or metrics use that metric.

Descriptions of Metric Properties on the Metric Details Page

The following Table provides descriptions of the metric properties you define on the Metric Details page.

Property	Description
Short Name	The name of the metric that uniquely identifies it for internal purposes. This field is system generated. You can only view this property; you cannot edit it.
Display Name	The name used for display in the column chooser and dashboard. The name must be unique for a given channel.
Description	The metric description.
Display on Column Chooser	Enable/disable option. Determines if the metric displays in the Column Chooser.

Property	Description
Display over 100%	A format option. Yes indicates that values over 100 display actual values. No indicates that values over 100 display as 100+.
Sequence Number	The default order of the metrics in the Column Chooser. Clicking Reset in the Column Chooser (accessed from the dashboard) displays the metrics with a sequence number.
Time Profile	Determines if the time profile is `Point in Time` or `Historical` (5 Min, 30 Min, or Today). You cannot edit this property for a standard metric. The following rule applies to the time profile of the metric itself and time profiles of the operands participating in its calculation: • If the metric belongs to the historical time profile, the operands can be either historical or point-in-time. • If the metric belongs to the point-in-time time profile, only point-in-time operands are allowed. This rule governs the operand selection list in the custom metric expression editor. Only compatible operands are available for selection. If an incompatible operand is entered using the keyboard, the calculation is rejected with a corresponding error message.
Time Profile for Charting	Determines if the metric is available for graphing (charting). To enable a metric for graphing, you must select a specific graphing period for the time profile. If None is selected, the metric is not displayed in the Metric Graphing window.
Threshold	Determines if a threshold rule can be created.
Threshold/Chart	The threshold range (minimum and maximum) values for the threshold, as well as y-axis values in the chart.
Decimal	A format option. Determines the number of decimal places to display for values.
Metric Type	Custom metrics are either raw metrics or calculated metrics. You cannot edit this property for a standard metric.

Summary Type	Determines how aggregation is performed on rolling up the metric to the various aggregating levels:
	
	• When the metric type is Raw, the options are:
	  • SUM
	  • MIN
	  • MAX

Property	Description
	• When the metric type is Calculated, Summary Type is not defined (None). A raw metric is a metric associated with an aggregation function and its single operand in the form of a source metric pulled directly from the source. A calculated metric is defined as a calculation expression involving one or more existing raw or other calculated metrics as operands and arithmetical operations applied to the set of these operands. Aggregation functions cannot be applied to the operands of a calculated metric expression. You cannot edit this property for a standard metric.
Channel	Determines the media channel type under which the custom metric is shown in the Column Chooser and on the dashboard. You cannot edit this property for a standard metric.
Object	Type of the target object. For example, Application. You can create custom application metrics only (you cannot create agent group or contact group metrics) You cannot edit this property for a standard metric.
Expression Editor	Use the Expression Editor to build the formula that produces a metric value. Use the Channel and Metric boxes to find existing metric expressions that you can use in the calculation of your new custom metric. In the Metric box, the Expression Editor lists only the metrics you can use in the calculation of the custom metric. The list of metrics that displays is based on the custom metric type (Raw or Calculated) and the base time profile (Historical or Point in Time). When you select a metric in the Metric box, a description of that metric displays in the Metric Description box. You cannot edit this property for a standard metric.

Using Metric Manager to Enable Metrics for Graphing

The Metric Graphing window is accessible from both Contact Center Advisor and Workforce Advisor. You specify which metrics users can graph using the Metric Manager. Use the Edit option associated with each metric on the Metric Manager page, or the Create button, to open the Metric Details page. On the Metric Details page, you can specify a time profile. That is, you specify whether the selected metric displays point-in-time (Now) or historical (5 Min, 30 Min, or Today) values. To enable a metric for graphing, you must select a time profile. Each metric can have more than one time profile for graphing. For example, you can enable both AHT 30 Min Growing and 5 Min Sliding for graphing. The number of metric/time profile combinations that can be graphed is controlled by the configurable property max.metrics.graphing.enabled in the CONFIG_PARAMETER database table in the Contact Center Advisor database. While this property can theoretically be set to any value, Genesys recommends you configure the limit to be 5 or less, for performance reasons. Note this parameter is shared by all Advisors modules, including CCAdv and WA. The parameter governs the total number of graphable combinations in both CCAdv and WA. Each metric/time profile combination is counted as 1.

For example, if you select AHT 30 Min Growing and AHT 5 Min Sliding, that is counted as 2 graph-enabled metrics. If you attempt to enable more metrics for graphing than the limit configured in the database, a warning message displays stating that the maximum number of metrics that can be graphed has been exceeded. You cannot save updates in the Metric Manager until you reduce the number of metrics enabled for graphing.

Enabling Metrics for Graphing

Start Procedure

1. Open the Administration module.
2. Click Metric Manager in the navigation pane.
3. Use the filters on the Metric Manager page (on the right) to show as many or as few metrics as required.
4. Do one of the following:
    - Select a metric and click Edit in the Actions column to open the Metric Details page.
    - Click Create to open the Metric Details page and create a new custom metric.
5. On the Metric Details page, select the Time Profile checkbox, if applicable. The Time Profile radio buttons are grayed out (that is, you cannot change the Time Profile) for Standard metrics.
6. To enable the metric for graphing, select time profiles from the Time Profile for Charting list.. If you select None, the metric is not displayed in the list of metrics in the Metric Graphing window (that is, it cannot be graphed). The Time Profile for Charting list is applicable only for Application and Contact Group metric types; it is disabled for Agent Group metric types (users cannot graph Agent Group metrics).