Contact Center Advisor and Workforce Advisor Help

Pulse Advisors 8.5.0

1/30/2022

Table of Contents

Welcome to the Contact Center Advisor and Workforce Advisor Help

Contact Center Advisor (CCAdv) and Workforce Advisor (WA) display real-time contact center activity throughout the enterprise and enable you to view operations from a central point of reference. WA complements CCAdv by integrating workforce data to enable the proactive management of agent schedule adherence by correlating actual staffing levels to those forecasted. WA calculates the deviations between actual and scheduled or forecasted metrics. Information technology and business operations personnel can proactively manage both business and technical aspects of the contact center operations and take action to correct problems before they affect the business operation.

Predefined alerting conditions on applications and contact groups can be established to display alerts on the dashboard, as well as notify designated users.

Accessibility Interface

The Advisors products include an accessibility interface for users with visual impairment. For more information, see Accessibility.

Role-Based Access and Permissions

Access to business objects (regions, contact centers, application groups) and metrics is controlled by roles defined by the administrator (role-based access). When you do not have access to these objects, you cannot see them or work with them in their respective panes on the dashboard. Access to base objects (applications, contact groups, and agent groups) depends on your access to the associated business objects. Therefore, on the dashboard, you can only see objects and metrics (and alerts that contain such metrics) to which the administrator specifically grants access.

Accessing Metrics

When you have access to a metric, you can see it in the following places:

- On the dashboard
- On the Column Chooser
- On the Performance Monitor

You can also graph the metric, see alerts for the metric, and receive alert notifications. (To see alerts and receive notifications, you must have access to the metric, geographic region, contact center, and application group of the alert.)

Accessing Other Objects

Role-based access also controls your ability to see and use the following objects and views in the interface:

- Enterprise row in the Contact Centers pane
- Column Chooser button
- Data in the Agent Group pane
- Grouping drop-down list
- Change Password menu
- Administration module
- Resource Management console (particularly the "Access to Notification Lists and Templates" section)
- Alert Management module and the data within the module
- Action Management Report page and the data in the page

Accessing the Alert Management Module and Action Management Report Page

Access to the Alert Management module and Action Management Report page is controlled by user roles defined by your administrator (role-based access). If your role does not include permissions to view the Alert Management module or the Action Management Report page, it is not displayed on your dashboard. Functionality within the Alert Management module and Action Management Report page is also controlled by the permissions associated with your role.

On the dashboard, on the Alert Management module, and in the Action Management Report page, access to alerts is controlled by role-based access to metrics and to the entities related to the base objects (geographic region, contact center, and application group) that generate the alerts. You see only those alerts that are based on metrics or related to business objects to which you have role-based access. To see an alert, you must have role-based access to the application group, contact center, and geographic region to which it relates.

Look for the following buttons and columns on your Alert Management module—they are indicators of the permissions associated with your role:

- New button: If present, you can create key action reports.
- Edit/Delete column: If present, you can edit and delete existing key action reports.
- Only the owner of the report can edit or delete a column.

You can see all key action reports with associated alerts to which you have role-based access. If a key action report has three alerts associated with it, you must have access to all of those alerts to access that report. All users can view key action reports which have no associated alerts.

When you assign a key action report, the assignee's permission to the report is checked when you attempt to save it. If the assignee does not have permission to view the report, you receive an error and it does not save until you assign it to someone who has permission to view it.

If the assignee of a key action report is later denied access to view the report because his/her permissions have changed, the following occurs:

- The report is not displayed in the list of key action reports.
- A warning is logged in the log file.
- The Advisors server reassigns the report to the person who created it.

Using the Dashboard

This section describes how to view dashboard information, how to select what information to display, and how the Map works.

Role-based access and permissions control what you can see and do in each Contact Center Advisor (CCAdv) and Workforce Advisor (WA) view. For more information about this topic, see Role-Based Access and Permissions.

This section contains the following topics:

- Viewing contact data
  - Contact Center Advisor: Contact Centers Pane
  - Contact Center Advisor: Applications and Agent Groups Panes
  - Workforce Advisor: Contact Centers Pane
  - Workforce Advisor: Contact Groups and Agent Groups Panes
- Metric graphing
  - Metric Graphing Overview
  - Metric Graphing Window
  - Reading the Graph
  - Graphing Metrics and Time Profiles
  - Saved and Discarded Graphing Data
  - Selecting a Portion of Data in the Metric Graphing Window
- Alerts
  - Viewing the Alerts
  - Alerts in the Map
    - Common Map Views and Functionality
    - Contact Center Advisor Map
    - Workforce Advisor Map
  - Scrolling and Resizing the Views
  - Alerts Window Attributes
- Customizing the dashboard
  - Column Chooser
  - Metrics Library
- General usage guidelines
  - Usage Guidelines

- Accessibility

Viewing Contact Center Data

The Contact Centers pane (or the hierarchy) enables you to monitor operations from a high level. You can expand the hierarchy to the lowest level to carry out root cause analysis, based on the violations highlighted in the tables or the alerts in the map or Alerts window. The ways in which you can view data in the Contact Centers pane differs, depending on whether you are in CCAdv or the WA.

There are also many common ways to change or customize all views. These are described in the sections below.

> **Important**
> To find other ways to change or customize the views that are specific to the Contact Centers pane you are using, see the CCAdv Contact Centers Pane or WA Contact Centers Pane topics in this help system.

In Contact Center Advisor, you can view data in the Contact Centers pane, Applications pane, and Agent Groups pane.

In Workforce Advisor, you can view data in the Contact Centers pane, Contact Groups pane, and Agent Groups pane.

Highlighting the Relationships Between Base Objects

In Contact Center Advisor, highlight the relationship between applications and agent groups:

- To highlight the agent groups, in the lower-left pane, select an application.
- To highlight the associated applications, in the lower-right pane, select an agent group.

In Workforce Advisor, highlight the relationship between contact groups and agent groups:

- To highlight the agent groups, in the lower-left pane, select a contact group.
- To highlight the contact groups, in the lower-right pane, select an agent group.

CCAdv and WA refresh the relationships once a day, overnight. Therefore, if the highlighting does not work as you expect, you may need to wait until the next day for this to happen.

Using the Contact Centers Pane

Expanding the regions in the Contact Centers pane—Select the arrow icon ▶. The selected row remains highlighted until you select another row that changes the information in the Applications pane.

Displaying the technical name for an application, contact group, or agent group—If provided, the descriptive name displays in the pane. To display the technical name, put your cursor over the descriptive name.

Sorting a column in ascending or descending order in the Applications, Contact Groups, or Agent Groups pane—Click on the header of the respective column. The table can be sorted only by a single column.

See also, Selecting Multiple Rows from the Applications or Contact Groups Pane.

Changing the width of a metric column—Click on a vertical line between two metrics, then drag left or right.

Displaying a metric description in a tooltip—Place the mouse pointer over a metric column header.

Resizing the Pane

To change the size of the panes to focus on information in a particular pane (to the exclusion of other areas of the dashboard), drag the splitter , located in the center of the four panes, in any direction. The vertical splitter increases and decreases the size between the Contact Centers and Applications or Contact Groups pane on the left and the Alert Map and Agent Groups panes on the right.

The horizontal splitter increases and decreases the size between the Contact Centers and Alert Map panes on the top and the Applications or Contact Groups pane and Agent Groups panes on the bottom. The relative sizes are saved when you log out and back in.

Open and Close Times

The open and close times of contact centers represent the official time for active data analysis. During non-operational hours, summaries that draw data from the contact centers (such as regional or application summaries) are calculated without that information.

Expired alerts can be viewed on the Alert Management tab.

Contact Center Advisor: Contact Centers Pane

In addition to what is described in the Viewing Contact Center Data topic, there are other ways to view data that are specific to the **Contact Centers** pane.

> **Tip**
> Each data grouping presents different values because of the way in which the rollups are calculated.

Selecting the Organizational Hierarchy

You can view information in the **Contact Centers** pane in the following ways:

- By geographic region, then by contact center, then by application group
- By geographic region, then by application group, then by contact center
- By operating unit, then by contact center, then by application group
- By operating unit, then by application group, then by contact center
- By reporting region, then by contact center, then by application group
- By reporting region, then by application group, then by contact center

Selecting the Time Profile for the Accumulation of Data

In the **Contact Centers** pane (and the **Applications** pane) you can select the time profiles of the values you want to display by clicking the buttons above the **Contact Centers** pane captioned **Short**, **Medium,** and **Long**. The dashboard then displays a subset, limited by time profile, of the metrics that are selected in the column chooser.

The calculations use values that pertain to the chosen period. **Now** (or point-in-time) metrics (that is, metrics whose values do not describe duration) are calculated and displayed for every time profile. The calculations of metric values for a time profile use the most recent values possible from the external source systems. The values are refreshed as often as Contact Center Advisor can read the values from the external systems from which it takes raw data.

- **Now**—The calculations have a time profile of **Current**, with duration `0`.
- **Short**, **Medium**, and **Long**—These calculations use values that describe the most recent interval as

specified by the administrator. For example, if the **Medium** values are set to use an interval of `30 minutes growing`, the intervals start at the most recent even half hour (for example, 09:00 or 10:30) and the values are accumulated to that instant in time.

Special Metric Values

When a calculation's denominator is zero or the data is not available, the dashboard displays `N/A`.

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

An administrator can make a contact center inactive, in which case Contact Center Advisor treats it as if it were always non-operational.

Effect of Zero Suppression

An administrator can choose not to display a business object on the dashboard if certain metric values are `zero`. Regions or application groups are hidden if calls offered and calls handled are `zero`.

Summaries of Metric Values

- Counts—Counts (such as the number of calls offered, number of calls abandoned, and calls in queue) are summed. The calculations de-duplicate applications, agent groups, and agents, so that each of these objects contributes its data to a rolled-up calculated value only once.
- Values—Values (such as the longest time in queue) take the minimum or maximum that is appropriate for that metric.
- Calculated values—Calculated values are calculated at the aggregate by first summing the components of the calculation, then performing the calculation. Examples of calculated value metrics include service-level percentage, abandoned percentage, and average handle time. The calculations de-duplicate applications, agent groups, and agents, so that each of these objects contributes its data to a rolled-up calculated value only once.

Highlighting

- The threshold violation colors in the **Applications** pane determine the threshold violation colors in the **Contact Centers** pane. In other words, if all of the threshold violations for a metric in the **Applications** pane are yellow, then the threshold violation color for the metric for the affected contact center in the **Contact Centers** pane is also yellow.
- If only one violation for a metric in the **Applications** pane is red, then the violation color for the metric for the affected contact center in the **Contact Centers** pane is red. The highest priority violation determines the color.
- A red violation in the **Contact Centers** pane might appear misleading when the value is in the yellow range of the threshold rule, but the color is displayed to call attention to the violations for the application and application group. The color does not indicate that the violation was triggered at that

level, but means that you should do root cause analysis, by drilling down to the application level to find the actual violation. Threshold rules are based on metrics and application groups. Therefore, you can have a threshold rule for SL% for Sales that is different than the rule for SL% for Rewards.

How to Change the Display Settings

To display the applications in a contact center on the **Applications** pane:

- Select the information icon beside a contact center (or click to select the whole line).
  Selecting a contact center displays the applications associated with the contact center. If the contact center is at level 3 in a grouping, then the applications are also filtered by the application group at level 2.

To display the applications associated with an application group on the **Applications** pane:

- Select the information icon beside an application group displayed at level 3 in a grouping.
  The applications are also filtered by the contact center at level 2 in the grouping.

To display the agent groups in a contact center on the **Agent Groups** pane:

- On the **Contact Centers** pane, select the information icon beside a contact center at the second level (or click to select the whole line).
  If the contact center is at level 3 in a grouping then the applications are filtered by the application group at level 2.

To display the agent groups in a contact center and application group:

- On the **Contact Centers** pane, select the information icon beside a contact center at level 3, or application group at level 3 (or click to select the whole line).

Expired alerts can be viewed on the **Alert Management** tab.

Contact Center Advisor: Applications and Agent Groups Panes

In addition to what is described in the Viewing Contact Center Data topic, there are other ways to view data on the **Applications** and **Agent Groups** panes that are specific to these panes.

Time Profile Values on the Agent Groups Pane

For out-of-the-box agent group metrics, the **Agent Groups** pane displays values for one time profile. However, for historical agent group metrics, the **Agent Groups** pane can display up to three time periods. It displays metric values for the **Now** profile and also those consistent with the time profile selected by the Administrator. (It always displays values for **Now**, that is, values that do not describe a duration in time.)

An administrator chooses which time profile all users see on the **Agent Groups** pane.

If you select a time profile button above the **Contact Centers** pane and it is the same as the administrator's choice, then the **Agent Groups** pane displays the values for that profile. The pane displays those from the full list of agent group metrics that are selected in the column chooser. If you select a time profile that differs from that set by the Administrator, the pane continues to show **Now** metric values only.

If you clear the time profile button that is the same as the administrator's choice, then the **Agent Groups** pane displays only the **Now** metrics that are selected in the column chooser.

Effect of Zero Suppression

An administrator can choose not to display a base object on the dashboard if certain metric values are zero.

An application is hidden if:

- It is from a Genesys external source, and the following metrics' values are zero:
  - calls offered
  - calls handled
  - e-mail messages offered
  - e-mail messages processed
  - chat interactions offered
  - chat interactions processed.

- It is from a CISCO external source, and the following metrics' values are zero:
  - calls offered
  - calls handled

An agent group is hidden if:

- It is from a Genesys external source, and the following metrics' values are zero:
  - logged in agents
  - calls offered
  - calls handled
  - e-mail messages offered
  - e-mail messages processed
  - chat interactions offered
  - chat interactions processed.
- It is from a CISCO external source, and the following metrics' values are zero:
  - logged in agents
  - calls offered
  - calls handled

In addition, the administrator can set CCAdv never to display certain applications or agent groups on the dashboard.

Workforce Advisor: Contact Centers Pane

This page describes ways to view data in the **Contact Centers** pane in addition to what is described in the Viewing Data topic. Each grouping presents different values because of the way in which the rollups are calculated.

Selecting the Organizational Hierarchy

You can group information in the **Contact Centers** pane in the following ways:

- By reporting region, then by contact center, then by application group
- By reporting region, then by application group, then by contact center
- By geographic region, then by contact center, then by application group
- By geographic region, then by application group, then by contact center
- By operating unit, then by contact center, then by application group
- By operating unit, then by application group, then by contact center
- By reporting region, then by network contact centers (CCs)
- By geographic region, then by network contact centers (CCs)
- By operating unit, then by network contact centers (CCs)
- By application groups, then by network contact centers (CCs)

Values on the Contact Centers Pane

Values are calculated on the cumulative average or sum for the current interval since the most recent even half-hour interval (for example, 09:00, 15:30, 22:00). This interval is from 0 to 30 minutes long. **Now** (point-in-time) metrics also appear on the display.

Contact Groups Included in the Rollups

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

Summaries for Metric Values

Summaries for metric values are one of two types:

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

  The number of calls offered on the Enterprise level is calculated as (`SUM(Calls Offered)`) taken from all contact groups included in rollup contact groups.
- Calculated values—Values calculated using formulae based on simple aggregations of the values from elements with properties that match the given rollup level. For example, average handle time is the aggregation of handled time divided by the aggregation of calls handled. The average handle time (AHT) on the Application Group level of the **Geographic Region–Contact Center–Application Group** view is Handle Time/Calls Handled taken from the set of applications associated to contact groups that are included in the rollup which belong to the given geographic region, contact center and application group.

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

Displaying Contact Groups and Agent Groups

You can change the way in which the Contact Groups and Agent Groups are displayed in the following ways:

To display the contact groups associated with a contact center on the **Contact Groups** pane:

- Select the information icon beside a contact center (or click to select the whole line).
  If the contact center is at level three in a grouping, then the contact groups are filtered by the application group at level two. Note that selecting an agent-group contact center at level 3 in a grouping displays the contact groups associated only with the agent-group contact center.

To display the contact groups associated with an application group on the **Contact Groups** pane:

- Select the information icon beside an application group (or click to select the whole line).
  The contact groups are filtered by the contact center at level 2 in the grouping.

To display the contact groups (grouped by reporting regions) associated with network contact centers only:

- Select the Reporting Regions-Network CCs grouping and an information icon beside a network call center.
  The contact groups functioning within regional call-type site contact centers and call-type network contact centers, and their associated agent-group contact centers appear.

To display the contact groups (grouped by geographic regions) for network contact centers only:

- Select the Geographic Regions–Network CCs grouping and an information icon beside a network contact center (or click to select the whole line).
  The contact groups functioning within regional call-type site contact centers and call-type network contact centers, and their associated agent-group contact centers appear.

To display the contact groups (grouped by operating units) for network contact centers only:

- Select the Operating Units–Network CCs grouping and an information icon beside a network contact center (or click to select the whole line).
  The contact groups functioning within regional call-type site contact centers and call-type network contact centers, and their associated agent-group contact centers appear.

To display the contact groups in application groups for network contact centers only:

- Select the Application Groups–Network CCs grouping and an information icon beside a network contact center (or click to select the whole line).
  The contact groups functioning within regional call-type-site contact centers and call–type-network contact centers, and their associated agent-group contact centers appear.

To display the agent groups in a contact center on the **Agent Groups** pane:

- Select the information icon beside a contact center (or click to select the whole line).
  If the contact center is at level three in a grouping, then the applications are filtered by the application group at level two.

Workforce Advisor: Contact Groups and Agent Groups Panes

This topic describes additional ways (aside from what is described in the Viewing Contact Center Data topic) to view data on the **Contact Groups** and **Agent Groups** panes.

Zero Suppressed Agent Groups

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

Threshold Violation Colors Relative to Metric Colors

The threshold violation colors on the **Contact Groups** pane determine the colors on the **Contact Centers** pane.

In other words, if all of the threshold violations for a metric on the **Contact Groups** pane are yellow, then the color for the metric for that contact center on the **Contact Centers** pane is also yellow.

If only one threshold violation for a metric on the **Contact Groups** pane is red, then the color for the metric for that contact center on the **Contact Centers** pane is red. The highest priority sets the color. Although a red violation on that **Contact Centers** pane might appear misleading when the value is in the yellow range of the threshold rule, the goal of the color is to call attention to the violation for the contact group.

Metric Graphing

You can launch the Metric Graphing window in Contact Center Advisor (CCAdv) and Workforce Advisor (WA) from the dashboard and use them to monitor graphs for trends and to determine the effectiveness of actions taken to resolve specific situations.

Metrics must first be enabled for graphing in the Administration module. Only metrics and business objects to which you have access are displayed on the dashboard (see Role-Based Access and Permissions). An administrator configures settings that determine which combinations of metrics and time profile values can be stored and then graphed, up to a maximum of five (by default).

> **Important**
> **AHT Short** and **AHT Long** each count as a separate metric for graphing.

The **Charting** button  is enabled when you select a single row in the following panes:

- In CCAdv—The **Contact Centers** pane or the **Applications** pane
- In WA—The **Contact Centers** pane or the **Contact Groups** pane

The **Charting** button is displayed if:

- You have permissions to view the metrics associated with the object, application, or contact group you selected.
- An administrator has enabled metrics for graphing.

> **Important**
> This feature is not available for agent groups.

See also:

- Metric Graphing Window
- Reading the Graph
- Graphing Metrics and Time Profiles
- Saved and Discarded Graphing Data
- Selecting Part of the Data in the Metric Graphing Window

Metric Graphing Window

You can launch the **Metric Graphing** window by using the **Charting** button within a single row of the **Contact Centers**, **Applications**, or **Contact Groups** pane. You can also change the graph style, and color in the **Graphing** window.

The type of metrics that are displayed can differ, depending on the context of the graph. For example, depending on the pane from which the **Metric Graphing** window is launched, you can graph the metrics to which you have access, and for which the Administrator has enabled graphing. For details, see the table below:

On this dashboard:	In this pane:	You can graph:
Contact Center Advisor	Applications	Application metrics only
Workforce Advisor	Contact Groups	Contact group metrics only
Contact Center Advisor or Workforce Advisor	Contact Centers Table	Application and/or contact group metrics

Selecting Metrics in the Graphing Window

The **Graphing** window shows a graph of selected metrics for the selected row. To learn how to choose the metrics you want to graph, see Graphing Metrics and Time Profiles.

Context of the Metric Graphing Window

Information about the location (or context) from which you launched the **Metric Graphing** window appears at the top of the **Metric Graphing** window.

In both CCAdv and WA:

- If you selected an object on the **Contact Centers** pane, then the information at the top of the **Metric Graphing** window displays the hierarchy level from which you made your selection (for example, `Consumer > Bank > Dallas`).
- If you selected an application on the **Applications** pane or a contact group from the **Contact Groups** pane and then launched the **Metric Graphing** window, the information at the top of the **Metric Graphing** window displays the object's name and the hierarchy level at which you selected to display the object.

ToolTips appear when you move your cursor over metric names in either the Metric Chooser or at the top of the graph. The tooltip shows the metric name and description, channel, and minimum and maximum metric values.

An administrator can configure Advisors to store historical and now values for graphing combinations of metrics and time profiles. When launched, each graph displays these values for a duration that is also configurable.

For example, if your system uses the default two hour duration for data collection, the metric values in the graph are from the past two hours. The time profile continues to grow while the graph is displayed. Missing or unavailable data for any part of the graph shows as gaps in the graph. See also, Selecting Part of the Data in the Metric Graphing Window.

The metric values display to the same precision used for display of that metric in the dashboard. For example, if values over 100 display as `100+` on the dashboard, then values over 100 in the **Metric Graphing** window also display as `100+`.

If the graph is closed and re-opened, the display begins with the period of data as configured by the administrator. Values accumulated in the previously open graph are lost.

Graphs Saved in User Preferences

If you log out or switch modules in the Advisor browser, up to five open graphs are saved. Then, when you return to the module these graphs will open automatically, displaying the saved graph settings.

Any graphs that are opened when you log out will be re-opened when you log back in. The following data is saved to user preferences:

- The current row
- Metrics
- Graph style for each metric
- Graph color for each metric
- Metric display order
- The time filter

> **Important**
> Graphs are not saved when you close the graphing window. Also, if configuration or permissions change in the meantime, some metrics or objects might not be available if you log out and then in again.

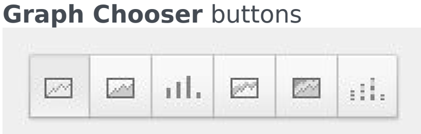
Reading the Graph

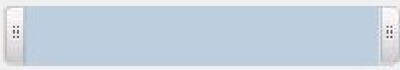
The horizontal axis of the graph represents time. The graph has two vertical axes, one on the left side of the graph and one on the right. The vertical axes represent the metric values. The graph displays metric values on the two vertical axes as follows:

- The first metric you select in the **Metric Chooser** is represented on the left vertical axis.
- Subsequent metrics you select in the **Metric Chooser** continue to be represented on the left vertical axis as long as the selected metrics have the same minimum and maximum values as the first selected metric.
- A metric that has different minimum and maximum values than the previously selected metric or metrics is represented on the right vertical axis.
- After there are selected metrics represented on both vertical axes, all subsequent metric selections act as follows:
  - If a selected metric's minimum and maximum values are the same as metrics represented on the left vertical axis, then that metric is also represented on the left axis.
  - If a selected metric's minimum and maximum values are the same as metrics represented on the right vertical axis, then that metric is also represented on the right axis.
  - Once you have selected metrics that establish a minimum and maximum value range for both the left and right vertical axes, any metric in the **Metric Chooser** that is not yet selected, and that has minimum and maximum values different from metrics already represented on the vertical axes, is disabled.

A color legend over the vertical axes indicates which metrics are represented on each axis.

The following table describes options on the **Metric Graphing** window. Use these options when working with selected metrics in the graph.

Feature	Description
Metric Chooser button 	Opens the list of metrics available for graphing. Metrics are identified by the display name.
Metric Layout button 	Opens the **Metric Layout** window. The **Metric Layout** button is enabled when you have two or more metrics in the graph, and if the selected graph style is Stacked Line, Stacked Area, or Stacked Bar. Drag and drop the metrics in the **Metrics Layout** window to re-arrange the order in which metrics display in the graph.
Graph Chooser buttons 	Select one of the following graph styles: • Line • Area • Bar

	• Stacked Line • Stacked Area • Stacked Bar You can change the graph style at any time while working in the **Metric Graphing** window.
Timeline Slider 	Use the **Timeline Slider** to focus the graph on specific time intervals. Use the **Time Interval** buttons to quickly adjust the **Timeline Slider**. See also Selecting Part of the Data in the Metric Graphing Window.
Time Interval buttons 	Use the Time Interval buttons to quickly adjust the Timeline Slider. The values that display on the Time Interval buttons are dependent on parameters that the administrator configures.
Timestamp 	The timestamp indicates when the metric data in the graph was last updated.

Graphing Metrics and Time Profiles

Administrators select which metrics and time profiles are available for you to graph. Choose up to five available metrics to display for the selected business entity.

To graph one or multiple metrics:

1. Select an object on the **Contact Centers** pane, an application on the **Applications** pane, or a contact group on the **Contact Groups** pane.
2. Click the **Charting** button in the selected row. If the metrics for the selected object, application, or contact group cannot be graphed, then the metric is disabled on the **Metric Chooser**.
3. After the **Metric Graphing** window opens, click the **Metric Chooser** button. A list of metrics appears. These are the metrics you can graph. The list reflects the choices made in the Administration module and the names shown in this list are the display names for those metrics.
   If metric data is unavailable for a selected object, application or contact group, you cannot select it. For example, non-voice metrics are not available for selection for voice-only applications.
4. Select the metrics you want to graph (one or more, up to five). For more information about selecting metrics, see Reading the Graph. A color appears in the box beside the metric name when it is selected. The name of the selected metric is displayed over the graph.
5. Click **Close** to close the list of available metrics, and to see the other graph options. See the table of graph controls in Reading the Graph for information about the graph options.
6. To change the display color or graph style for a metric, click the colored box beside the metric name at the top of the graph. The **Color/Style Picker** opens. You can use each color only once in the graph.
7. Move your cursor into the graphing area to display the "metric needle". As you move your cursor over the graph, the needle moves also. Use the needle to find values for each graphed metric at specific points-in-time (values for each metric update at the top of the graph).

To Graph Multiple Time Profiles for a Historical Metric:

- Using the **Metric Chooser,** select from the list of historical metrics that have different time profiles for display. For example, you can choose the following metrics to display in a single graph:

- [ ] AHT Short
- [ ] AHT Medium
- [ ] AHT Long

The Administrator can advise you of the maximum number of metrics that can be graphed. The default value is `five`. CCAdv and WA share this value, which governs the total number of metrics to graph in both components combined.

When choosing multiple time profiles of a metric to graph, keep in mind that each combination of metric plus time profile is counted. In the following example, 3 metrics are selected for graphing:

- [x] AHT Short
- [x] AHT Medium

- [ ] AHT Long
- [ ] ASA Short
- [ ] ASA Medium
- [x] ASA Long

Saved and Discarded Graphing Data

Metrics graphing data is calculated and saved to the Metric Graphing database. When the **Graphing** window is opened, it can immediately retrieve from the server historical data for a configured interval, plus the same amount of future data for forecast metrics.

Persistent Graphing Data

Graphs that you created, or are in the process of creating, persist if you intentionally or accidentally log out. When you log in again, these same graphs, including the metrics you selected for graphing, are retained until you deselect the metrics or close the graphing window.

See also, Graphs Saved in User Preferences.

Selecting Part of the Data in the Metric Graphing Window

The **Timeline Slider** bar at the bottom of the **Metric Graphing** window represents the total set of data available. You can select part of that total data set for display in the main graph.

- To change the width of the **Timeline Slider,** click one of the **Time Interval** buttons or drag the left or right side of the **Timeline Slider**.

If you drag one or both sides of the **Timeline Slider** to reduce the length of the time interval you are viewing in the graph, you can place your cursor within the highlighted area of the **Timeline Slider** and drag to move the selected interval back or ahead in time within the graph.

The time profiles determine the duration for which Advisors displays metric data in the graph. For example, if the administrator configures Advisors to maintain metric data for two hours, then the total possible time duration for which Advisors displays metric data when you launch the **Metric Graphing** window is two hours. If you open the **Metric Graphing** window from the **Contact Groups** pane, it also includes forecast (future) time.

Viewing Alerts

You can view alerts in the map or in the **Alerts** window.

In the Map

Many of the ways in which you can view alerts in the dashboard map are common to both CCAdv and WA (see Common Map Views and Functionality). However, there are some differences. To change or customize the views that are specific to the map you are using, see the following topics:

- Contact Center Advisor Map
- Workforce Advisor Map

In the Alerts Window

In the **Alerts** window, views and functionality are common to both CCAdv and WA. The **Alerts** window launches as a separate pop-up window over the dashboard (CCAdv or WA) when you click the **View Alerts** button on the map.

> **Important**
> If the XML files containing alerts are unavailable or connection to the server is lost, an error message appears when you open the **Alerts** window.

The **Alerts** window organizes alerts information in a standard format, and has filter and search mechanisms to help you to find the information you need about alerts quickly. It lists alerts of all kinds.

- When opened from the CCAdv dashboard, it displays threshold violation alerts for application metrics, peripheral offline alerts, and manual alerts.
- When opened from the WA dashboard, it displays threshold violation alerts for contact groups and manual alerts. See also Alerts Window Attributes.

To navigate the **Alerts** window views and change the display of data, see the following topics:

- Scrolling and Resizing Views
- Searching and Filtering Alerts
- Displaying ToolTips

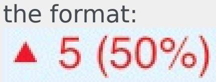
- Changing the Contact Center View
- Launching the Action Management Report

Important

The same thresholds are applied to the values of a metric no matter its time profile. However, the alerts in the **Alerts** window apply only to threshold violations for values in the **Short** and **Now** time profile groups (not for the **Medium** and **Long** time profile groups).

Alerts Window Attributes

The attributes listed in the table below are applicable to both the CCAdv and WA Alerts windows, with the exception of the Peripheral Offline column. This column is applicable to the CCAdv **Alerts** window only.

	Metric Threshold Violation Alerts	Peripheral Offline Alerts	Manual Alerts
Name	The display name of the metric threshold violation and its current value (in red [Critical], or yellow [Warning]). Hovering over a metric displays a brief description (this is the description configured in the **Metrics** page of the Administration module).	Displays Peripheral Gateway Offline.	The message configured for the alert. The message is configured in the **Manual Alerts** page in the Administration module.
Context	The scope of the metric; that is, geographic region, application group and contact center. The display format is: Geographic Region/Application Group/Contact Center/Base Object Name.	Displays the name of the contact center and offline peripheral.	Displays the name of the contact centers associated with the alert. Because a manual alert can be associated with multiple contact centers, there are multiple entries in the **Alerts** window for a given manual alert, with one entry for each contact center.
Metric Value	The metric value.	Displays Critical.	Displays Critical if the level of the alert (as configured in the Administration module) is 1. If the level is 2, the second line displays `Warning`.
Last Updated Metric Deviation	Displays the following three types of data in the format:  • **Value pointer**—An up arrow or down arrow, depending on whether the value has increased or		

	decreased since the last reading. • **Difference value**—Equals the current value minus the last read value (that is, `dv = cv - lrv`). • **Difference percentage**—Equals the result of the current value, minus the last read value, multiplied by the last read value (that is, `dp = [cv - lrv] lrv`). The text is colored according to severity: red [Critical], or yellow [Warning].		
Start time and Duration	The start time and duration of the metric. For example: `Alert Started: 15:34, Duration: 1h:50m`		
Threshold	The violation and warning thresholds. Thresholds with only an upper or lower limit will have one of the following structure: Upper level: `xx to xx` or Lower level: `xx to xx` Thresholds with both an upper and lower limit will have the following structure. Upper level: `xxxxxx to` xxxxxx Lower level: xxxxxx `to xxxxxx`	Displays `Technical`.	Displays `Manual Business` or `Manual Technical` depending on the type of manual alert.
Sparkline	A graph appears in the expanded cell, showing the metric and alert activity from the time the sparkline is open. At each bar (time interval) a tooltip displays the date, time, and metric value. The columns are colored at each time interval, according to the severity of the alert.		

	Metric values are gathered and a point is drawn at each 20-second refresh cycle.		
Action Links	Below the sparkline is a link to **Create Report**. **Create Report**: Hover over the cell, then click this link to open an Action Management Report for the target alert. The number of available reports (in total) is displayed.		

Scrolling and Resizing the Views

The views in the **Alerts** window each display alerts in their own individual rows:

- The **Global** view displays all alerts in one list.
- The **Contact Center** views display alerts that are specific to each contact center.

There is one **Global** view and one **Contact Center** view for each configured contact center that you have permissions to see. To display a list from which you can choose a contact center or the **Global** view, click the contact center name or the **Global** view in the navigation bar at the top of the **Alerts** window.

> **Tip**
> When the **Alerts** window is opened and there are no alerts, a "No Alerts" message appears.

You can scroll through the alerts automatically or manually by using the **Auto** or **Manual** radio button at the bottom of the window.

- In **Auto** mode, alerts are shown for all contact centers in the **Global** view, then for each contact center in the **Contact Center** views in a carousel-like manner.
- In **Manual** mode, you control the list of alerts that display.

Selecting **Auto** mode enables all auto actions, such as:

- Automatic scrolling through the **All Alerts** view (**Global**) and then each **Contact Center** view, horizontally in a loop.
- Views switching automatically every 20 seconds (if you take no action).
- Temporary disabling of **Auto** mode if you perform an action in the **Alerts** window.
- Resumption of **Auto** mode if you take no further action after 15 seconds.
- Disabling of **Auto** mode when you select **Manual** mode.

Selecting **Manual** mode enables all manual actions, such as:

- Manual scrolling through the **All Alerts** and **Contact Center** views, vertically (up or down) and horizontally (right or left, using the arrows in the navigation bar).
- Expanding or collapsing each individual alert.

The **Alerts** window is resizable (minimum size 800 by 410 pixels). If it is expanded vertically, more alerts are displayed in the window. If it is expanded horizontally, more of the context in each alert is displayed in the window.

Searching and Filtering Alerts

Just below the navigation bar at the top of both the **Global** and **Contact Center** views, is the **Search** field and below that, the **Channel** filters (represented by the Voice, E-mail, and Web Chat icons) and **Other Settings** (the **Gear** icon).

Typing in the **Search** field enables you to filter alerts by text attributes. For example, filter the list of alerts to those specific to a metric, region, application group, contact center, application, or contact group. Only the alerts matching the search criterion are displayed. When you clear the search field of text, the complete list of alerts is restored.

Clicking the **Channel** filters enables you to filter by one or more channels. Click the Voice, E-mail or Web Chat icons to hide or display the alerts for these channels. For example, disabling the Voice icon hides the voice-metric related alerts and displays only e-mail- and web chat-metric related alerts.

Clicking the **Other Settings** (**Gear**) icon enables you to toggle between expanded and collapsed views of the alerts, remove inactive alerts from the view, or sort the alerts by Severity or by Most Recent.

Displaying ToolTips

Display tooltips that provide additional information about certain features and functionality by placing your cursor in the following areas:

- In the **Alert** row—Hovering in the empty space highlights the cell in blue and displays a tooltip containing the metric display name, description, and context. The context is the origin of the alert (see Alerts Window Attributes).
- The **Metric Value** button—Hovering over this button displays a tooltip containing the following:
  - The last read value.
  - The absolute difference between the last read value and the previous value, with an indication of the direction of the change (+/-).
  - The percentage value of the absolute difference.

Changing the Contact Center View

In the **Contact Center** view, alerts are filtered and displayed according to the contact center that is selected, with each alert and its details in a separate cell. You can view alerts in collapsed or expanded mode. By default, alerts are displayed in collapsed mode, but can be expanded by clicking on the alert cell. To return to collapsed mode, click the cell again.

In collapsed mode, you can view basic alert information, such as:

- The metric name on the left in bold black text. Depending on the type of alert, this could be the name of the threshold violation alert metric.
- The metric value and alert severity label on the right is color-coded to indicate either Warning or Critical. Hover over the label to see the upper- and lower-level threshold. For example, the warning or upper level threshold is 30-40.
- The metric start time and duration (using the 24-hour clock) are displayed on the left in gray text.
- The deviation from the last updated value displays on the right, with text colored according to severity. An arrow indicates an increase or decrease in the value.

In expanded mode, you can view the basic alert information and the spark line graph at the bottom, with warning and critical-colored bar graph indicators. The y-axis represents the metric value and the x-axis represents time.

In both collapsed and expanded mode, you can view the **Create Report** action link by hovering over the bottom right corner of each row.

For detailed descriptions of the alert attributes listed above, see Alerts Window Attributes.

Launching the Action Management Report

To launch the **Action Management Report** page for threshold violation alerts and peripheral offline alerts, click the link at the bottom-right of the alert's row in the **Alerts** window.

The information from the alert displays in the Alerts section of the Action Management Report. Access to the **Action Management Report** page is controlled by user roles defined by your administrator (see Role-Based Access and Permissions). If the link is not visible in the **Alerts** window, you do not have permissions to view the Action Management Report.

> **Tip**
> You can also launch the **Action Management Report** page from within the **Alert Management** module or by double-clicking on an alert tile from the map.

Common Map Views and Functionality

The CCAdv and WA maps are international and display the location of all contact centers as small dots. There are two alert views, **Business** and **Technical**.

- Contact centers with alerts display as larger dots, red for priority 1 and yellow for priority 2.
- Threshold violation alerts are created from threshold violations that persist for a configured amount of time.
- A contact center with multiple active business alerts is represented on the map with an orange square.
- A contact center with multiple active technical alerts is represented by a star on the map.

Find more information or modify the map display by performing the following tasks:

- Display the contact center name by pointing at a contact center.
- Automatically cycle through each alert of all contact centers by clicking the **Auto** button . The default setting is to scroll automatically.
- Automatically cycle through each alert of a single contact center by clicking the **Semi-auto** button.
- View hidden portions of the international map by clicking the map and using the arrow keys.
- Zoom the map in or out by clicking the map and using the **+** and **−** keys.
- Make alerts more noticeable by turning on blinking using the **High Alert** toggle .

Display Options

To select one or both alert views (**Business** and **Technical**), select the corresponding button at the top of the map. When you select a button, the status indicator changes color—gray for no alerts, red, and yellow. The highest severity sets the color.

There are three display options:

- **Technical**—A map showing active technical alerts with the details in a carousel.
- **Business**—A map showing active business alerts with the details in a carousel.
- **View Alerts**—Alerts of all kinds appear in a pop-up window. The window has two views:
    - The **Global** (top level) view, which displays all alerts in one list.
    - The **Details** (sub level) view, which displays information about a particular contact center and detailed information about its alerts.

Alert Details

A carousel displays all alerts in a list (**Global** view) or with alert details (**Details** view) for individual contact centers. The contact center name appears across the top of the carousel. The data is refreshed dynamically every 20 seconds.

The names in white type have alerts, the ones in gray do not. The tile of the alert currently in view is highlighted. In automatic mode, the carousel scrolls past contact centers without alerts and moves to the next contact center with alerts.

When you select an alert tile, the mode switches to manual. Display other alerts by selecting another alert tile, or selecting **semi-** or **auto-scroll** mode.

Double-clicking an alert tile launches the **Action Management Report** window; the information from the alert displays in the **Alerts** section of the **Action Management Report**.

Contact Center Advisor Map

The Contact Center Advisor map contains the business and technical alerts on the current day in a carousel.

To display these alerts for a specific contact center, click the red or yellow dot representing the contact center. Then, at the bottom of the map, click the tile that represents the alert.

The carousel displays the violation description, subject, start time, and duration of the alert.

Manual Alert Display

Manual alerts are displayed as follows:

- If both a site contact center and a network contact center are selected for the manual alert and the network contact center has latitude and longitude coordinates, an alert for each contact center appear on the map.
- If both a site contact center and a network contact center are selected for the manual alert, the network contact center alert and the site contact center alert appears in the **Alerts** window.
- If only a site contact center is selected for the manual alert, the site contact center alert appears in the **Alerts** window.

Alerts are created from threshold violations that persist for a specified amount of time. Threshold violation alerts are business alerts that occur when violations, based on metric threshold rules, persist for a configured amount of time. Manual alerts are created by an administrator and can be either business alerts or technical alerts. Alerts about offline peripherals are technical alerts and are created only by conditions in Cisco Intelligent Contact Management (ICM).

An alert is generated when an event occurs in which a target or threshold is reached. Based on the threshold trigger delay rate set on the **System Configuration** page, a metric value that violates a threshold must remain above or below the threshold for a set amount of time (for example, 15 minutes) before the violation creates an alert that displays on the map. Peripheral offline and manual alerts display immediately.

In a network contact center configuration, alerts generated for an application are associated with the network contact center, as well as with all site contact centers to which the application is related via at least one agent group. An alert for an application displays on the map for a network contact center (if latitude and longitude are defined), as well as for the site contact center that handles that particular application.

E-mail messages that notify users about alerts are only sent to individuals who have rights to the following objects that could be related to the alert:

- Metric
- Application group
- Regions

- At least one contact center

E-mail messages are not sent for manual alerts.

An alert re-notification is sent if the severity level of an alert changes, and otherwise at the notification refresh rate set by an administrator.

An e-mail re-notification is not sent for:

- An update to a metric value
- Expiration of an alert

Workforce Advisor Map

The Workforce Advisor map contains the navigational options and information related to alerts.

Alert Types

The **Business** view displays two types of alerts:

- Contact group metric threshold alerts
- Manual alerts

To display alert details from the map for a contact center, click the red, yellow, or orange dot representing the contact center. Then at the bottom of the map, click the tile that represents the alert. The carousel displays the violation description, subject, start time, and duration of the alert.

An inactive or closed contact center displays as a dot on the map even if an active business alert does not exist.

Manual Alert Display

Manual alerts are displayed as follows:

- If both an agent-group contact center and a call-type contact center are selected for the manual alert and the call-type contact center has latitude and longitude coordinates, an alert for each contact center displays on the map.
- If both an agent-group contact center and a call-type contact center are selected for the manual alert, the call-type contact center alert and the agent-group contact center alert display in the **Alerts** window.
- If only an agent-group contact center is selected for the manual alert, the agent-group contact center alert displays in the **All Alerts** window.

Alert Information

Alerts generated for a contact group can be associated with a network contact center and with all agent-group contact centers (via the agent groups). An alert for a contact group appears on the map for a network contact center (if latitude and longitude are defined), as well as for the agent-group contact center that handles that particular contact group.

> **Important**
> WA does not monitor peripheral gateway group availability.

An alert notification is generated when an event occurs in which a target or threshold is reached. Based on the threshold trigger delay rate set on the **System Configuration** page, the alert must persist for a set amount of time (for example, 15 minutes) before it appears on the map. Manual alerts are an exception to the threshold trigger delay rate; they appear immediately.

E-mail messages are only sent to individuals who have rights to the metrics, geographic region, contact centers and application group related to the alert.

E-mail messages are not sent for manual alerts.

An alert re-notification is sent if the severity of an alert changes. An e-mail re-notification is not sent for:

- An alert that continues to occur
- An update to a metric value
- Expiration of an alert

The e-mail re-notification is based on the notification refresh rate set on the **System Configuration** page.

Column Chooser

Use the **Column Chooser** to select which CCAdv or WA metrics to display on the dashboard. Only metrics to which you have access are displayed on the dashboard (see Role-Based Access and Permissions).

Selecting Time Profiles

The **Column Chooser** shows all metrics from all time profiles and enables you to select metrics from different time profiles.

For example, the **Available Metrics** pane shows three entries for AHT (average handle time) for applications, one for each time profile (Short, Medium, and Long). You can then choose to display one, two, or all three on the dashboard.

Default Columns

When the Column Chooser is launched for the first time, (that is, the set of displayed columns has never been configured in a previous session), the list of metrics on the **Selected Metrics** pane (and shown by default on the **Dashboard**) corresponds to the default set of selected metrics configured in the Administration module.

Default Metrics Sort Order

The default sort order of metrics is set by the administrator.

Moving Metrics by Pinning/Unpinning

Metrics can be moved between the **Selected Metrics** and **Available Metrics** panes by selecting ("pinning") and deselecting ("unpinning") them.

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

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

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

The number of selected metrics is limited to fifty Key Performance Indicators (KPIs). If you select more than fifty, a warning message appears.

Changing the Display Order of Pinned Metrics

You can change the order of selected metrics in the **Selected Metrics** list by dragging and dropping them to a new position.

Metrics Library

A library serves as a shortcut to select a list of metrics. You can create Metrics Libraries from the **Libraries** tab on the **Column Chooser**. Only metrics to which you have access are displayed on the dashboard (see Role-Based Access and Permissions).

The Metrics Library enables you to:

- Create reusable lists of metrics to display on the dashboard. For example, you could create a set of metrics that might be required for a specific management task, such as a set of non-voice metrics.
- Maintain those lists.

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

- Default
- From Dashboard: Retrieves the metrics exactly as displayed on the dashboard.

Creating a New Library

1. Select **Create New** from the **Library** drop-down list.
   The **Save As, Reset,** and **Delete** buttons are disabled at this point.
2. Add a name for the library.
3. Enter a description (optional).
4. Add metrics to the library.
5. Click **Save.** When the library is saved, the remaining buttons on the page are enabled.

As you create libraries, they are added to the Libraries drop-down list. When you select a library, the description of that library is displayed next to the drop-down list, and the Selected Metrics pane is cleared and populated with the list of metrics that make up the library. Metrics that are not included in that list are displayed on the **Available Metrics** pane.

You can either add more metrics to the **Selected Metrics** pane by selecting them on the **Available Metrics** pane or remove metrics from the **Selected Metrics** pane. However, if you select a different library from the drop-down list, all the metrics on the **Selected Metrics** pane are replaced with the list of metrics that are part of the newly selected library.

Usage Guidelines

This page lists and describes how to use general dashboard features.

- When logging in and out, the following are retained: the time profile, metric sequence, column sorting, column widths, row expansions, the location of the splitter, the grouping, and the last-selected module.
- When the denominator is zero or the data is not available, the dashboard displays `N/A`.
- If a metric value cannot ever be supplied by the data source, a dash (-) is displayed in its place.
- When a contact center is closed or the values for a region or application group are all zeros, the row is not displayed.
- A data connectivity indicator changes from green to red if an external data source has not updated within a configured time frame. When it is red, if you put your cursor over it, it will show you the name of the external data source that has not updated. Designated individuals are notified by e-mail when a violation is triggered.
- The last update time indicates the time of the last data refresh.
- To stop the data from updating, click the **Pause** button . The button changes to and the update status indicator changes to yellow. The data resumes updating if you select a new hierarchy grouping.
- To resume updating the data, click the **Play** button . The button changes back to , the update status indicator changes to green, and the real-time updates resume.
- The update status indicator in the top-right corner changes to red when the dashboard cannot detect any data to display.

Accessibility

The Advisors accessibility interface functionality is a subset of JAWS Standard version 11. It provides audio and a series of keyboard shortcuts that can be used to navigate the tabulated information on the screen. The screen content is translated into voice in the local language.

To log in to the accessibility interface, use the URL specific to your enterprise. Language options are dependent on the version of Advisors used in your enterprise.

The login page URL uses the following format for Contact Center Advisor (CCAdv):

```
http(s)://<server>[:port]/ca-xml/accessibleDashboard[?language=<en|de|fr>]
```

The login page URL uses the following format for Workforce Advisor (WA):

```
http(s)://<server>:[port]/wu/accessibleDashboard[?language=<en|de|fr>]
```

For example, if the server you use to connect to the accessible dashboard has an IP address of `10.10.10.10`, and a port of `8080`, and you use a English-language Contact Center Advisor accessible dashboard, the URL in your enterprise would be the following:

```
http://10.10.10.10:8080/ca-xml/accessibleDashboard?language=en
```

When the login page is loaded, the software prompts you to enter your user name and password.

Click **B** on your keyboard to log out.

The information on this page includes instructions about how to use the accessibility interface after you successfully log in.

Accessibility Interface Home Page

The accessibility interface home page contains navigation links.

> **Important**
> The links are available only if you have permissions to use them (see Role-Based Access and Permissions).

The navigation links open the following pages:

- CCAdv/WA dashboard pages:
  - Reporting Region - Contact Centers
  - Reporting Region - Application Groups

    - Geographic Region - Contact Centers
    - Geographic Region - Application Groups
    - Operating Unit - Contact Centers
    - Operating Unit - Application Groups
- Additional WA dashboard pages:
    - Geographic Regions - Network CCs
    - Reporting Regions - Network CCs
    - Operating Units - Network CCs
    - Application Groups - Network CCs
- the Alerts page (applicable to both CCAdv and WA)

Navigation on the Home Page

Use the **TAB** key (move forward) and the **SHFT+TAB** key combination (move backwards) to move between links on the home page.

The accessibility software provides audio to identify each link when you select it. To open a page from a link, select the link and press **Enter** on your keyboard.

Dashboard Pages

When you open a dashboard page, the accessibility software reads the view name and navigation help tips.

The dashboard pages consist of tables that provide information associated with reporting regions, geographic regions, operating units, and application groups. In tables that contain metric values, the accessibility software notifies you if metric values have triggered an alert. The audio reads "critical" or "warning" after any metric value that is in violation.

The Contact Center Advisor accessibility interface groups the metrics that display on any dashboard page first by channel, then by time profile, and finally alphabetically by metric name.

Alerts Page

To find the total number of critical and warning alerts, navigate to the **Alerts** page, which contains a table that provides information such as:

- metric names and descriptions
- metric values
- alert level for each metric (alerts are ordered by alert level: critical, then warning)
- description of each alert

Basic Navigation on Dashboard and Alerts Pages

To navigate using a link, select the link and press **Enter** on your keyboard.

Keyboard shortcuts can be used in conjunction with the screen reader accessibility software, as an alternative to the standard browser navigation. The following table describes the basic keyboard shortcuts.

Shortcut	Accessibility Function
T	Stops the audio explanation of the navigation help tips and jumps to the CCAdv or WA view table.
CTRL + ALT + NumPad5	Reads the row and column coordinates, followed by the cell contents, then the appropriate row and column headings.
CTRL + ALT + Right Arrow	Moves one cell to the right in the same row.
CTRL + ALT + Left Arrow	Moves one cell to the left in the same row.
CTRL + ALT + Up Arrow	Moves one cell up in the same column.
CTRL + ALT + Down Arrow	Moves one cell down in the same column.
CTRL + ALT + Home Key	Moves to the first cell in the current table.
CTRL + ALT + End Key	Moves to the last cell in the current table.
Alt + Left Arrow key	Select another view.
Backspace Key	Returns to the accessibility interface home page.
B	Log out.

Alert and Action Management

Using Alert Management, you can record the action taken to resolve one or more alerts, as well as the results of that action. You can record each action in a separate report. These key action reports create a knowledge base that helps to identify repetitive patterns and resolve future violations quickly.

> **Important**
>
> Role-based access and permissions control what you can see and do in each CCAdv and WA view. For more information about this topic, see Role-Based Access and Permissions.

Alert Management Module

From the **Alert Management** module you can:

- Assess the success of the actions taken and learn what action to take for future similar alerts. See Displaying the Key Action Reports for an Alert.
- View the details of the alerts associated with a key action report. See Displaying the Alerts for a Key Action Report.
- Delete a key action report. See Deleting Key Action Reports.
- Filter the rows in either the **Alerts** pane or the **Key Action Reports** pane by date or text search. See Filters.
- Clear the date filter in either the **Alerts** pane or the **Key Action Reports** pane by clicking **Clear.**
- Add a new Key Action Report by clicking **New.**

Key Action Reports and Alerts

The **Alert Management** module displays a table of alerts and a table of key action reports, which enable you to determine the following:

- The best action to resolve a violation
- The key action reports for which you are responsible
- The key action reports for one or more alerts
- The alerts for one or more key action reports
- The alerts that do not have associated key action reports

The map displays all alerts, active and inactive. Only active alerts appear on the **Alert Management** module of the CCAdv and WA dashboards.

Key Action Reports Table

From the Key Action Reports table you can:

- Select a key action report to highlight its associated alerts.
- Select an alert to highlight its associated key action reports.

The details of a key action report are described in the Action Management Page.

Key Action Report Table

The details of a key action report are described in the table below.

Parameter	Description
Column Chooser button	Opens the **Column Chooser**, enabling you to select the columns you want to hide or display.
Author	(Display only): The user name of the user who creates the key action report.
Responsible Assignee	The user name of the user who carries out the action. The responsible assignees are *not* notified when they are assigned to an action.
Creation Time/Date/Time Zone	(Display only): The system time at which the key action report is saved.
Key Action Time/Date/Time Zone	When the action was actually taken. The default is the creation time, date, and time zone.
Update Time/Date/Time Zone	(Display only): The system time at which the key action report is updated.
Alert Cause	The cause of the alert.
Alert Cause Description	(Optional): A description to elaborate on the selected alert cause.
Key Action Taken	The action taken to resolve the alert violation.
Key Action Description	(Optional): A description to elaborate on the selected key action taken.
Results of Action Taken	(Optional): A description for the result.
Lessons Learned	(Optional): A description for the lessons learned.
Success Rating	A rating for the success of the key action. Providing a value for the success rating indicates that the key action report is complete. The values are `3, 2, 1, 0, -1, -2`, and `-3`; where 3 indicates that the key action is successful, `0` indicates that the key action had no effect, and `-3` indicates that the key action had a negative effect.

Success Time	The amount of time it took for the action to have a successful impact; that is, the violation end time and date minus the key action start time and date, where the key action has a success rating of `1, 2` or `3.` The format is `hh:mm:ss.` If the violation end time and date are not available, the value `NA` is displayed. If the start time of the key action is earlier than the end time of the violation, a negative value is displayed.
Primary Alert	If the key action report is associated to an alert, the alert details are saved when the report is saved. If multiple alerts are associated, one of the alerts must be designated primary.
# of Associate Alerts	The number of alerts associated to the key action report. This parameter is particularly useful if you do not have permission to see all of the alerts associated to a key action report. If you do not have access to the primary alert, the primary alert values are not displayed.

Alerts Table

The details of the Alerts pane are described in the table below.

Attribute	Description
Column Chooser button	Opens the **Column Chooser**, enabling you to select the columns you want to hide or display.
Alert Type	Indicates the type of the alert: • (B) Business • (T) Technical
Priority	Indicates the alert severity: • 1—(shown in red on the dashboard) • 2—(shown in yellow on the dashboard)
Description	The description of the problem. For a threshold alert the description is the metric name and metric value. For a technical alert the description is the text `peripheral offline`.
Subject	The name of the entity generating the alert. • For a business alert, the subject is the name (or descriptive name, if available) of the application, call type, or contact group. • For a technical alert, the subject is the name of an offline peripheral related to the peripheral gateway.
Threshold Type	Contact Group, Application, PG Offline
Contact Centers	The contact center affected by the alert.
Start Time/Date/Time Zone	Date, time, and time zone when the alert started. The format is `mm/dd/yyyy ##h:##m.`
Alert Duration	The duration of the alert from the time the alert started to the time the alert expired, or to the current time if the alert is still active. The format is `##h:##m.`
Status	The alert status (active or expired).
Max Violation	The maximum violation is the maximum difference between the acceptable threshold value and the worst metric value since the alert started. • If the acceptable threshold is `80%` and the worst value was `90%,` the maximum violation is `10.`

	• For a peripheral offline alert, the message `N/A` is displayed.
Threshold	The value used to calculate the maximum violation. The maximum violation is the maximum difference between the acceptable threshold value and the worst value violated since the alert started.
Value at Max Violation	The value of the metric at the time of its maximum violation. For the meaning of maximum violation, see above. • If the acceptable threshold is `80%` and the worst value was `90%,` the value at maximum violation is `90.` • For a peripheral offline alert, the message `N/A` is displayed.
End Date/Time/Time Zone	The date and time at which the alert expired. The format is `mm/dd/yyyy ##h:##m.`
Reporting Region	For a threshold violation alert, the reporting region of the application, call type, or contact group.
Operating Unit	For a threshold violation alert, the operating unit of the application, call type, or contact group.
Geographic Region	For a threshold violation alert, the geographic region of the application, call type, or contact group.
Application Group	For a threshold violation alert, the application group of the application, call type, or contact group.
Source System	For WA, the source system property is the name of the forecast data source supplied in the data input from the following supported Workforce Management systems: • Genesys Workforce Management • IEX Total View • Aspect eWFM • Pipkins Each system can supply multiple data sets, resulting in multiple source system names. Examples of the Source System content are: • iex1 • iex2 • aspect • pipkins1

	For CCAdv, the source system property is the internal name given to the external source system when you configured CCAdv.
Primary Alert	If the key action report is associated with an alert, the alert details are saved when the report is saved. If multiple alerts are associated, one of the alerts must be marked primary.

See also:

- Alert Management Overview
- Displaying the Alerts for a Key Action Report
- Displaying the Key Action Reports for an Alert

Displaying the Key Action Reports for an Alert

When you select one or more key action reports, multiple alerts might be displayed. To identify which alerts are associated with a particular key action report, click on that key action report. The associated alerts in the **Alerts** table are highlighted in a secondary color.

1. Select the **Alerts-Key Action Reports** view. The **Alerts** table appears above the **Key Action Reports** table.
2. Select one of the following:

- A single row
- Multiple individual rows by holding down the **CTRL** key and clicking on the individual rows to be selected
- A contiguous block of rows by clicking the first row in the block then holding down the **SHIFT** key clicking on the last row in the block

The **Key Action Reports** table displays the actions for the selected alert(s).

See also:

- Displaying the Alerts for a Key Action Report
- Deleting Key Action Reports

Displaying the Alerts for a Key Action Report

You can select one or more alerts, which may cause multiple key action reports to be displayed.

1. Select the **Key Action Reports-Alerts** view. The **Key Action Reports** table appears above the **Alerts** table.
2. Select the key action report rows in the **Key Action Reports** table. The **Alerts** table displays the alerts for the selected key action reports. The context displays the key action name (that is, the selected value).

See also:

- Displaying the Key Action Reports for an Alert
- Deleting Key Action Reports

Deleting Key Action Reports

You can edit or delete key action reports on the **Alert Management** module if you created the report (in other words, if you are the owner).

To delete a key action report, use the following procedure. If you do not have permissions to delete key action reports from the **Alert Management** module, the **Edit/Delete** column does not appear on your **Alert Management** module.

1. Select the **Key Action Reports-Alerts** view on the **Alert Management** module. The **Key Action Reports** table appears above the **Alerts** table.
2. Select one of the following:
    - A single row
    - Multiple individual rows by holding down the **CRTL** key and clicking on the individual rows to be selected
    - A contiguous block of rows by clicking the first row in the block then holding down the **SHIFT** key clicking on the last row in the block
3. Click **Delete.** The **Key Action Reports** table refreshes.

See also:

- Displaying the Alerts for a Key Action Report
- Displaying the Key Action Reports for an Alert

View Options

Access to the **Alert Management** module and to the **Action Management Report** page is controlled by user roles defined by your administrator (role-based access). If your role does not include permissions to view the **Alert Management** module, for example, the module is not displayed on your dashboard. For more information, see Alert Management.

By default, the **Key Action Reports** table appears above the **Alerts** table and is filtered to the key action reports for the current day. For more information on filtering, see Filters.

The **Alerts** table (lower table) remains empty until you select a key action report in the upper table. You can change the table orientation by selecting the **View** option:

- **Key Action Reports-Alerts** (default view)—Displays the **Key Action Reports** table above the **Alerts** table.
- **Alerts-Key Action Reports**—Displays the **Alerts** table above the **Key Action Reports** table.

See also:

- Role-Based Access Permissions
- Sorting the Rows
- Refreshing the Data
- Personalized Settings
- Filters

Sorting the Rows

In the **Alerts** table, the default sort order is ascending by the description.

In the **Key Action Reports** table, the default sort order is ascending by the key action name.

See also:

- View Options
- Refreshing the Data

Refreshing the Data

The status of alerts may change frequently and other users might also be creating key action reports.

Click **Refresh** to update both the **Alerts** and **Key Action Reports** tables with the most up-to-date information.

See also:

- View Options
- Personalized Settings

Filters

You can filter the rows by one of two date/time-range filter options, and by a text search.

Filtering alerts by dates and times compares the dates and times to the start time and end time of the alert. If the alert is still active, then instead of using the alert's end time, the filter uses the current time on the server. If any instant between the alert's start and end time falls within the range specified by your filter's dates and times, then the filter includes the alert in its output.

Filtering key action reports by dates and times compares three date and time properties of a key action report to the dates and times in the filter. It compares the key action date and time, the creation date and time, and the last updated date and time. If any of those dates and times is within the range specified by your filter's dates and times, then the filter includes the key action report in its output.

Filtering refreshes only the table on top. After filtering, the table on the bottom displays no items until a row in the table is selected. The current status of the record always appears.

The historical information always reflects the current hierarchy. For example, if an application was associated to the sales application group, but then its association is updated to the services application group, the values for the services application group appear, no matter which time interval is used.

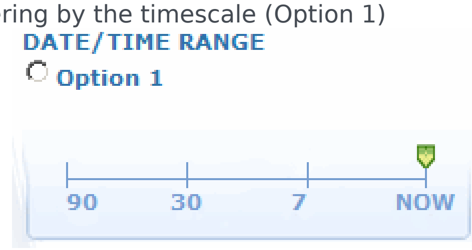
To apply the filter, click the **Filter** button.

Time Zones

You can create Key Action Reports for different time zones.

Whereas alerts display a timestamp based on your user permissions and the time zone of your local server, key action reports display a timestamp related to the time zone in which the report was created.

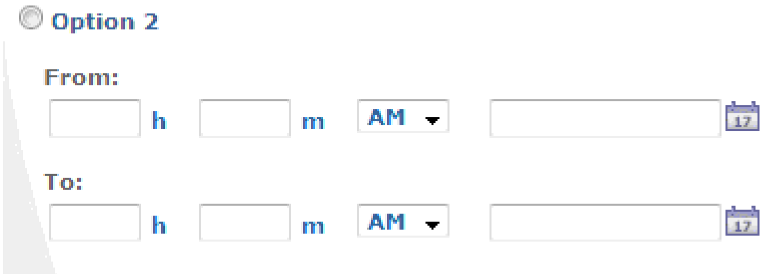
- Filtering by the timescale (Option 1)



If the time slider is set to the last seven days on March 26, 2008 at 14:14, then the results are from March 19, 00:00 to March 25, 23:59.

You can display data as it exists for the current day, the last seven days, the last 30 days, or the last 90 days. The time scale defaults to today (**NOW**). "Now" is the period that begins at 12:00 AM GMT and ends at the last available 30 minutes.

- Filtering by specifying dates (Option 2)



You can filter by specifying the start date and time and the expiration date and time—this filter includes data from within that interval.

See also:

- Displaying the Alerts for a Key Action Report
- Displaying the Key Action Reports for an Alert

Personalized Settings

Logging in and out retains the selected **Alerts-Key Action Reports** view and date/time filter setting, and other settings.

See also View Options.

Action Management Report Page

You can open the **Action Management Report** page from either the Map for one alert, from the **Alerts** window for a single alert, or from the **Alert Management** module for one or more alerts. From this page, you can add key action reports to the alerts.

You can also add a key action report which has no associated alert—for example, for a preventative action. You can only do this from the **Alert Management** module. To maintain existing key action reports, you must open the **Action Management Reports** page from the **Alert Management** module.

The **Action Management Report** page includes four sections that expand and collapse:

- **Alerts**—The current values of the alert selected on the Contact Center Advisor or Workforce Advisor map or the **Alert Management** module.
- **Key Action Reports**—A table of the existing key action reports.
- **Key Action Report Details**—The details of the key action report.
- **Follow Up**—The results and success of the action taken and the lessons learned.

From the **Action Management Report** page you can:

- Add a report to assign an action or enter the details of the key action taken to resolve one or more rule violations. See Adding a Key Action Report from the Map.
- Delete an alert from an existing key action report. See Modifying a Key Action Report.
- Display or edit a key action report. See Modifying a Key Action Report.

Adding a Key Action Report from the Map

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

Use the following procedure to add a key action report that records the action taken to resolve an alert violation and the results of that action. To complete this task, your role must include permissions to access the **Action Management Report** (AMR) page.

Adding a Key Action Report

1. On the map, do one of the following:
    - Double-click in the carousel on a tile representing a contact center alert. If clicking the alert tiles in the Map does not launch the **Action Management Report** page, you do not have permission to view it.
    - From the **Alerts** window, click the **Create Report** link for an alert. If the link is not visible, you do not have permission to view the **Action Management Report** page.
    - When an alert is for a network contact center and an agent-group contact center that share the call type, both the network contact center and the agent-group contact center display an alert on the map. When you click either tile, the summary indicates both contact centers because the alert that either tile represents is the same underlying alert.
2. Enter the first few letters of the responsible assignee’s user name, first name, last name or e-mail, and select a name. The user name is displayed.
3. Specify when the key action was performed in the **Key Action Time, Date,** and **Time Zone** fields.
4. The time format is `hh:mm` using the 24-hour clock. The date format is `MM/DD/YYYY` or you can select a date by using from the calendar icon. The default is the current system time, date, and time zone of your server.
5. Either select a cause from the **Cause** drop-down list or type one in the **Cause** field. The cause name must be unique and is not case-sensitive.
6. To suggest that the cause you typed in the **Cause** field should be available for future selection from the **Cause** drop-down list, select the **Add to List?** check box.
7. The cause will display in the **Causes** table on the **Administration Alert Causes** page for an administrator to approve.
8. Optionally, provide more details for the cause in the **Alert Cause Description** text box. An alert cause must be specified in order to enter a description. The text-box limit is 256 characters.
9. Either select a key action from the **Key Action Taken** drop-down list or type one in the **Key Action** field. The key action name must be unique and is not case-sensitive.
10. To suggest that the key action you typed in the **Key Action Taken** field should be available for selection in the future from the **Key Action Taken** drop-down list, select the **Add to List?** check box.

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

11. Optionally, provide more details for the key action in the **Key Action Taken Description** text box. A key action must be specified in order to enter a description. The text-box limit is 256 characters.
12. Enter a description of the results of the action taken in the **Results of Action Taken** text box. Once the key action report is saved, the description cannot be edited. The text-box limit is 256 characters.
13. Enter a description of the positive or negative results of the action taken in the **Lessons Learned** text box. The text box limit is 256 characters.
14. To rate the success of the action taken, select a rating from the **Success Rating** drop-down list.
15. To save the key action report, click **Save**. The **Action Management Report** page closes and the dashboard is displayed.
16. The **Action Management Report** page can also be launched from a metric threshold violation alert, or a peripheral gateway offline alert, by clicking on the arrow icon in the upper right of the **Alerts** pane. The alerts table on the AMR page is populated with the information from the alert from which the AMR is launched.

Modifying a Key Action Report

You can modify a key action report to make corrections or to complete the **Follow Up** section. The key action and the result of action taken are the only non-editable data. When an existing key action report is opened, the alerts in the **Alerts** section display current values.

Access to the **Alert Management** module and the **Action Management Report** page is controlled by user roles defined by your administrator (role–based access). To edit a key action report using the following procedure, your role must include permissions to access the **Alert Management** module and the **Action Management Report** page.

> **Tip**
> Text boxes are limited to 256 characters.

Alerts added to an existing key action report are *secondary alerts.*

To modify a key action report:

1. From the **Alert Management** module, select the **Key Action Reports—Alerts** view. The **Key Action Reports** pane appears on top.
2. Click the **Edit** icon for a key action report. The **Action Management Report** page displays the key action report details.
3. To remove an alert from a key action report, in the **Alerts** section clear the **Assign to Key Action Report** check box.
4. Type the first few letters of the responsible assignee's user name and select a name. The user name is displayed.
5. Specify when the key action was performed in the **Key Action Time, Date,** and **Time Zone** fields. The time format is `hh:mm` using the 24-hour clock. The date format is `MM/DD/YYYY` or you can select a calendar by clicking the **Calendar** icon. The default is the current system time, date, and time zone of your server.
6. Either select a cause from the **Cause** drop-down list or enter one in the **Cause** field. The cause name must be unique and is not case-sensitive.
7. To make the cause you entered available for selection in the future from the drop-down list, select the **Add to List?** check box. The cause appears in the **Causes** table on the **Administration Alert Causes** page for an administrator to approve.
8. Optionally, provide more details for the cause in the **Alert Cause Description** text box. An alert cause must be specified in order to enter a description.
9. To make the key action you entered in the **Key Action Taken** field available for selection in the future from the **Key Action Taken** drop-down list, select the **Add to List?** check box. The key action taken appears in the **Key Actions Taken** table on the **Administration Key Actions** page for an administrator to approve.
10. Optionally, provide more details for the key action in the **Key Action Taken Description** text box. A

key action must be specified in order to enter a description.

11. Enter a description of the positive or negative results of the action taken in the **Lessons Learned** text box.
12. To rate the success of the action taken, select a rating from the **Success Rating** drop-down list.
13. To save your information, click **Save.** The **Action Management Report** page closes and the **Alert Management** module appears. The key action report appears and is highlighted in the **Key Action Reports** pane.

Resource Management

Resource Management enables users who have permission to change the skills and skill levels of agents or to log an agent out. You can also notify the affected parties of the actions by e-mail. Notifications are also a stand-alone action for managing agents within the contact center.

For example, if call volume spikes and all agents need to be on the phone, a notification message (for example, "All hands on phones") can be sent by e-mail to agents' mobile phones, causing agents to leave training or breaks and return to the phones. The changes are published to Genesys operational systems and have immediate impact on contact-center operations.

A good routing and resource plan based on historical data should represent a typical day. However, for unplanned events that happen during a day, Resource Management is available to address *temporary* changes to skills and skill levels, such as increased volume.

Warning

Resource Management is not intended for bulk changes and may disrupt mission critical system requests.

Launching Resource Management from the hierarchy is not recommended because the number of agents and agent data pulled may be very large and impact performance. Genesys recommends launching Resource Management from the Agent Groups pane, the Applications pane in CCAdv, or Contact Group pane in WA, in order to pull fewer than 150 agents.

Role-based access and permissions control what you can see and do in CCAdv and WA. For example, if the System Administrator has granted you access to Resource Management, the **Resource Management** icon is available on your dashboard and you can open the **Resource Management** window. For more information about this topic, see Role-Based Access and Permissions.

Prerequisites

Before Resource Management features can be used to manage agent information, data must be configured at the Contact Center Advisor/Workforce Advisor system administrator level. Please refer to the *Performance Management Advisors Contact Center Advisor & Workforce Advisor Administrator User's Guide* for more information.

Access to Notification Lists and Templates

To access Resource Management, an Administrator must grant you access privileges to the Resource Management console. Otherwise, the button that enables you to access the tool is not displayed on the CCAdv or WA dashboard. The Administrator can grant access to the Resource Management console only, and configure the notification lists and templates that are used in the console, or he/she can grant access to the Resource Management console and the Administration module and you configure the initial lists and templates on your own.

Using Resource Management

Open Resource Management from Contact Center Advisor or Workforce Advisor by doing one of the following:

- Selecting a Single Row from the Contact Centers Pane
- Selecting One or Multiple Rows from the Applications or Contact Groups Panes
- Selecting One or Multiple Rows from the Agent Groups Pane

You cannot select rows across panes; for example, you cannot select a row on the **Applications** pane and a row on the **Contact Centers** pane.

See also:

- Selecting Your View of the Information Displayed for Agents
- Refreshing an Agent's Current Status
- Sorting the List of Agents
- Filtering the List of Agents
- Viewing Performance Metrics for Agents

Selecting a Single Row from the Contact Centers Pane

From the **Contact Centers** pane, either:

- Select a single row and click the **Resource Management** icon, or
- Right-click and select **Launch Resource Management** from the short-cut menu.

Warning

Resource Management is not intended for bulk changes and may disrupt mission critical system requests.

Launching Resource Management from the hierarchy is not recommended because the number of agents and agent data pulled may be very large and impact performance. Genesys recommends launching Resource Management from the Agent Groups pane, the Applications pane in CCAdv, or Contact Group pane in WA, in order to pull fewer than 150 agents.

See also:

- Selecting Multiple Rows from the Agent Groups Pane
- Selecting Multiple Rows from the Applications or Contact Groups Pane

Selecting Multiple Rows from the Applications or Contact Groups Panes

From the **Applications** pane in Contact Center Advisor or the **Contact Groups** pane in Workforce Advisor, select one or more rows and click the **Resource Management** icon. The agents associated with the selected applications or contact groups are displayed.

From the **Applications** pane or **Contact Groups** pane, you can select one or more rows. When you select a row, the agent groups associated with the application or contact group are highlighted on the **Agent Groups** pane. If multiple applications or contact groups are selected, the agent groups highlighted on the **Agent Groups** pane are those associated with the application or contact group that was selected last. The last-selected application or contact group is identified by a blue border and a darker shade.

> **Important**
> Contact groups are not currently under role-based access control. See Role-Based Access and Permissions.

See also:

- Selecting a Single Row from the Contact Centers Pane
- Selecting Multiple Rows from the Agent Groups Pane

Selecting Multiple Rows from the Agent Groups Pane

From the **Agent Groups** pane, available in Contact Center Advisor and Workforce Advisor, select one or more rows and click the **Resource Management** icon. The agents associated with the agent groups selected are displayed.

As you select a row, the associated applications or contact groups are highlighted on the **Applications** pane in Contact Center Advisor, or the **Contact Groups** pane in Workforce Advisor. If multiple agent groups are selected, the applications or contact groups highlighted on the **Applications** or **Contact Groups** pane are those associated with the agent group that was selected last. The last-selected agent group is identified by a blue border and a darker shade.

See also:

- Selecting a Single Row from the Contact Centers Pane
- Selecting Multiple Rows from the Applications or Contact Groups Pane

Selecting Agent Information to View

Resource Management displays each agent on a separate row in the table with the following information:

- First Name
- Last Name
- User ID
- State
- Time in State—How long the agent has been in the state.
- Reason Code—The reason why an agent is not ready; for example, break, meeting, or after call work. Only appears if the Genesys configuration has reason codes configured.
- Agent Group—The agent group(s) of which the agent is a member.
- Skills & Levels—The skills are displayed with their associated levels as configured for that agent.

The default width of the **Skills & Levels** column displays only one of the skills associated with an agent. You can either:

- View all of the skills associated with an agent in a ToolTip by clicking the Skills & Levels cell for an agent, or
- View all of the skills for the set of displayed agents by clicking on the ellipses (**...**) in the column header.

The latter collapses the **User ID, State, Time in State,** and **Reason Code** columns, and the **Skills & Levels** column expands to bring all of the skills into view.

You can still resize the columns to adjust the view. To return the columns to their original width, click on the ellipses (**...**) in the **Skills & Levels** column header.

See also:

- Filtering the List of Agents
- Sorting the List of Agents

Refreshing an Agent's Current Status

The information in the table is not updated automatically. To update the phone states, times in state, and reason codes, click the **Refresh** button ().

See also:

- Filtering the List of Agents
- Sorting the List of Agents
- Viewing Performance Metrics for Agents

Sorting the List of Agents

You can sort and sub-sort agents by clicking on any column heading except the **Skills & Levels** column.

The **Skills & Levels** column is not sortable because agents possess different skills and are not listed in the same order across the agents.

See also:

- Viewing Performance Metrics for Agents
- Filtering the List of Agents

Filtering the List of Agents

You can filter the list of agents by the following:

- Text Search
  Text search filters the list of agents whose details contain the specified text in any field.
- Agent Groups
  This list contains all of the agent groups related to the rows selected on the Dashboard.

  For example, if an application is selected on the Dashboard, then all the agent groups associated with that application appear in this list. Selecting one or more agent groups results in filtering the list of agents to show only those belonging to those agent groups.
- Skills
  This list contains an aggregate of all of the skills for all of the listed agents.

  For example, suppose that a Genesys environment has three defined skills: Customer Service, Banking, and Trade Accounts. If the agents have only two of these three skills—Banking and Trade Accounts—those are the skills that appear in the filter.

  Selecting one or more skills filters the list of agents to only those that have those particular skills.
- Status
  This list contains all of the states that an agent can be in at any given moment. Selecting one or more states filters the agents to show only those who are currently in the selected states. The list of states is as follows:
  - AfterCallWork
  - Break Type1
  - Break Type2
  - CallConsult
  - CallDialing
  - CallInbound
  - CallOutbound
  - CallInternal
  - CallOnHold
  - CallRinging
  - CallUnknown
  - LoggedIn
  - LoggedOut
  - Monitored
  - NotMonitored
  - NotReadyForNextCall

- OffHook
- OnHook
- Offline Work Type2
- SM_Engaged
- SM_Outbound
- WaitForNextCall

See also:

- Sorting the List of Agents
- Viewing Performance Metrics for Agents

Viewing Performance Metrics for Agents

You can display performance metrics from Stat Server. Performance metrics are available on a per-agent basis measured over the last five minutes. To view them, perform the following steps:

1. Click the **Column Chooser** icon.
2. The **Performance Metrics Column Chooser** dialog box appears. The dimmed columns are always displayed by default.
3. Select the performance metrics to be displayed.
4. Click **OK.**

The performance metrics appear to the right of the **Skills & Levels** column, so you may need to scroll to the right to see them.

See also:

- Sorting the List of Agents
- Filtering the List of Agents

Managing Agents

The agents listed in **Resource Management** are those in the agent groups that are associated with the rows selected in Contact Center Advisor or Workforce Advisor within the selected grouping.

Some agent metrics, particularly agent state metrics, are used to calculate some metrics for CCAdv applications, WA contact groups, and consequently aggregated objects, such as application groups, regions, and contact centers. Consequently, the agents in an agent group appear in **Resource Management** even if you do not have permission to see the associated contact center or application group.

If an associated agent group is configured not to display on the Dashboard, but is included in the rollups of metrics, the agents still appear in Resource Management.

An agent does not appear if the metrics for the selected object are inactive, not included in the rollup, or not assigned to an application group or region.

Agents shown in Resource Management are the ones whose actions drive the performance and metrics of the user-selected entity that you want to influence (apart from purely application-level or contact group-level metrics).

See also:

- Selecting Agents
- Managing Agent Skills
- Maintaining Agent Skill and Skill Levels
- Logging Out an Agent

Selecting Agents from the Contact Centers Pane

From the **Contact Centers** pane, available in both Contact Center Advisor and Workforce Advisor, you can select only a single row to launch **Resource Management.**

> **Warning**
>
> Resource Management is not intended for bulk changes and may disrupt mission critical system requests.
>
> Launching Resource Management from the hierarchy is not recommended because the number of agents and agent data pulled may be very large and impact performance. Genesys recommends launching Resource Management from the Agent Groups pane, the Applications pane in CCAdv, or Contact Group pane in WA, in order to pull fewer than 150 agents.

Selecting Agents from the Applications or Contact Groups Pane

From the **Applications** pane in Contact Center Advisor, or the **Contact Groups** pane in Workforce Advisor, you can select one or more rows.

Selecting Agents from the Agent Groups Pane

From the **Agent Groups** pane, available in both Contact Center Advisor and Workforce Advisor, you can select one or more rows.

You cannot select the **Totals and Averages** row. You cannot select rows across panes; for example, you cannot select a row on the **Contact Centers** pane and a row on the **Applications** pane at the same time.

Managing Agent Skills

Using Resource Management you can manage the skills, skill levels, and login status of agents. You can:

- Add, edit, or remove skills and skill levels of agents, see Maintaining Agent Skills and Skill Levels. You can apply changes to up to 150 agents at once in a single transaction.
- Log agents out from T-Server or SIP Server.
- Notify parties of changes to skills, see Notifying Parties About Changes.

Maintaining Agent Skills and Skill Levels

To add, edit or remove skills and skill levels for single or multiple agents:

1. Select the agent(s) from the dashboard, and launch Resource Management. For information about selecting agents, see Selecting Agents.
2. Select the check boxes next to the agents whose skills and levels are to be changed. To select agents adjacent to one another in the list, select one agent check box then **SHIFT + click** to select the check box for the last agent in the adjacent set.
3. Either add, edit or remove the skills and skill levels for the selected agents, as explained in the sections that follow.

To add a skill:

1. From the **Action** drop-down list, select **Add.** The **Skill** drop-down list opens, showing all of the available skills.
2. Select a skill. From the **Level** drop-down list, select the skill level (a value between 1 and 10).

If you assign a skill that the agent already has, the skill level is overwritten. For example, if Diane has "French" as a skill at level 3, and you re-assign Diane the "French" skill at level 5, Diane’s "French" skill level will be overwritten with level 5.

To edit a skill:

1. From the **Action** drop-down list, select **Edit.** The **Skill** drop-down list shows an aggregated list of the skills based on the selected agents. For example, if two agents are selected and the first agent has two skills ("English" and "French") and the second agent has two skills ("English" and "Spanish"), then the **Skills** drop-down list contains "English", "French", and "Spanish".
2. Either select a skill from the complete **Skill** drop-down list or enter the skill name in the drop-down list and select one from the shorter list that appears.
3. Select a level. The selected agents who already have that skill are updated with the new skill level. If a selected agent does not have that particular skill, no changes are made to the agent.

To remove a skill:

1. From the **Action** drop-down list, select **Remove.** The **Skill drop-down** list shows an aggregate of the skills based on the selected agents (as described above under "To edit a skill").
2. Select the skill to be removed or type the skill name in the drop-down box and select one from the shorter list. That skill is removed from the selected agents. If a selected agent does not have that skill, no change is made.

To save or cancel your changes:

1. To save the changes, click **Apply,** and then confirm at the prompt.
2. To see which agents the change is being applied to, select the **Show Agents** check box.
3. Click **OK** or, to return to Resource Management without saving changes, click **Cancel.**

- If you clicked **OK,** the **Notification** dialog box opens. For information about notifications, see Notifying Agents About Changes.

Logging Out an Agent

To change an agent’s status to logged out:

1. Select the agent(s) you wish to log out.
2. Select **Logout** from the **Change Phone State** drop-down list and then click **Update.** A dialog box opens for you to confirm the action.
    - To see which agents are going to be logged out, select the **Show Agents** check box.

Once the notification dialog is displayed, you can do one of the following:

- Set up a notification.
- Click **Submit** at the bottom to log out the agent(s) without any notifications.
- To notify parties of the change of status, see Notifying Parties About Changes.
- To return to Resource Management without saving changes, click **Cancel.**

See also Selecting Agents.

Using Notifications

Notifications are standard texts that are used to tell agents and other system users about changes to their profile details, timetable, working arrangements, or any other event. Notification texts can be linked to lists of users, or to individuals.

In this section you can find out about:

- Notifying Parties About Changes
- Notifying Agents About Changes
- Creating a New Notification Message
- Using a Previously Created Notification Message
- Maintaining Notification Lists

Notifying Parties About Changes

You can notify agents, their supervisors, team leads, and managers after changes are accepted and implemented on the Genesys operational system.

To notify a party about a change:

1. Select an agent or agents from the **Resource Management** window.
2. Do one of the following:
   - Update information under **Manage Skills,** and then click **Apply.**
   - Select **Logout** from the **Change Phone State** drop-down list and then click **Update** to log out the selected agent(s).
3. If prompted, you can choose to show the agent(s) affected by your changes.
4. For the notification message, either:
   - Select an existing notification template from the **Select Template** list (the message details appear). You can edit them, but you cannot save these changes.
   - Create a notification message by typing a template name in the **Create Template** field. To add the notification to the template and the list for future use, select the check box.
5. To send the notification to the affected agents and their supervisors, select the **Notify Affected Parties** check box.
   - To send a notification to people on a list, select the **Notify Lists** check box and select the lists. You can add an optional message for those on the notification lists.
6. Click **Submit.** The notification is sent and a confirmation screen appears.
7. To return to the **Resource Management** window, click **Close.** The confirmation message closes. The agents affected by the change are highlighted at the top of the list. If a skill was added or edited, then that skill displays in boldface for all the affected agents.

See also:

- Notifying Agents About Changes
- Creating a New Notification Message
- Using a Previously Created Notification Message

Notifying Agents About Changes

Notification templates provide explanations and reasons for the directives and actions taken from the **Resource Management** console.

A notification system in the **Resource Management** console enables you to communicate with agents. You can inform an agent or a group of agents about such things as:

- Changes to their schedule
- Unusual events that might occur
- Measures being put in place to handle fluctuating call volumes

To start the notification process, select a set of agents and click the **New** button.

See also:

- Notifying Parties About Changes
- Creating a New Notification Message
- Using a Previously Created Notification Message

Creating a New Notification Message

To create a new notification message:

1. Select an agent or agents from the **Resource Management** window and click the **New** button under **Notification.** The **Notification** dialog box opens.
2. Select the **Create Notification** radio button.
3. Enter a name in the text box next to the **Create Notification** radio button.
4. Optionally, enter a message in the **Message** text box.
5. Save the notification by checking the **Save notification** check box. The notification is then saved to the database and available for future use.
6. Click the **Send** button. An indicator screen shows the progress of request processing. After the notification has been sent to all the selected agents, the confirmation screen appears.

See also Using a Previously Created Notification Message.

Using a Previously Created Notification Message

To use an already-created notification message:

1. Select an agent or agents from the **Resource Management** window.
2. Do one of the following:
    - Click the **New** button under **Notification.**
    - Update information under **Manage Skills,** and then click **Apply.**
    - Select **Logout** from the **Change Phone State** drop-down list and then click **Update** to log out the selected agent(s).
3. If prompted, you can choose to show the agent(s) affected by your changes.
4. Select an existing notification template/message from the drop-down list. (This list is populated with the notification templates listed in the database.) The message is shown in the **Message** text box.
5. Optionally, edit the message. Edits cannot be saved from the **Message** text box. All changes must be made through the Administration module. The **Save notification** check box is not available when you choose to use a pre-existing message.
6. Click **Send** to send the notification.

See also Creating a New Notification Message.

Maintaining Notification Lists

To add a notification list:

1. On the Administration module navigation bar, click **Notification Lists.** The **Notification Lists** page opens.
2. Click **New.** The **Add/Edit Notification List** window opens.
3. Type a name for the notification list.
4. To add an e-mail address, type one in the **Add E-mail** field and then click **Add.**
5. Click **Save.** The **Notification Lists** page shows the newly-created list along with the rest of the existing notifications.

To edit a notification list:

1. On the Administration module navigation bar, click **Notification Lists.**
2. Click the **Edit** icon next to the notification list that you want to edit. The **Add/Edit Notification List** window opens. The details appear in the **User's E-mail** section.
3. Update the name of the notification list.
4. To add a new e-mail address, type one in the **Add E-mail** field and click **Add.**
5. Click **Save.** The **Notification Lists** page reappears.

Performance Monitor

The Performance Monitor enables you to select and monitor key performance indicators of a contact center's activity in real time.

The Performance Monitor is available with Contact Center Advisor only. To enable the Performance Monitor button:

- Select a row on the **Contact Centers** pane.

Role-based access and permissions control what you can see and do in each CCAdv view. For example, you see only metrics to which the System Administrator granted you access. For more information about this topic, see Role-Based Access and Permissions.

This section contains the following information:

- Choosing the Information to Monitor
- Creating a Snapshot of the Performance Monitor
- Current Capacity and Call Flow
- Application Metrics

Choosing the Information to Monitor

On the **Contact Centers** pane, select the organizational hierarchy from the drop-down menu, select the metrics and a row, then click the **Performance Monitor** button 

. The **Performance Monitor** window appears on the desktop outside of the browser.

> **Important**
> Only metrics to which you have access are displayed.

- The metric values refresh continuously.
- The path of the selected row on the **Contact Centers** pane is shown at the top of the Performance Monitor (for example, `Consumer - Internet Banking - Billing Gold`).
- The hierarchy and metrics remain until you change the information on the **Contact Centers** pane and click the **launch** icon. If you do not click the **launch** icon, you can change the columns and groupings on the **Contact Centers** pane without closing the current **Performance Monitor** window.
- The **Application Metric** boxes are deleted if you change the grouping, click the **Performance Monitor** button 

, and then click **OK** to the **Are You Sure?** prompt. The Performance Monitor is updated with the newly selected grouping. Clicking **Cancel** to the **Are You Sure?** prompt cancels the update of the Performance Monitor.
- The **Refresh Rate** indicator shows when the metric values will be refreshed.

Creating a Snapshot of the Performance Monitor

Click the snapshot button .

- The **Snapshot** window shows the same as the **Performance Monitor** window except that the information is static, enabling you to compare the values at a single point in time with real-time values. The **Snapshot** window displays the time and date when it was created.
- To resize the **Current Capacity, Call Flow,** and **Application Metrics** areas, drag the splitter.
- To maximize, minimize, or exit the **Performance Monitor** window, click ,  or  respectively.
- To move the **Performance Monitor** window, click and drag the window title bar.

Current Capacity and Call Flow

Depending on your access, you may or may not see these areas. If no access is granted to either area, then the left side of the window is hidden. Depending on your access, you may or may not see some of the metrics in these areas.

Current Capacity

The **Current Capacity** area displays workforce metrics—**Staffed, Talking, Available,** and **Calls in Queue**—from Contact Center Advisor. The values are from the **Now** interval. This area is shown if you have access to any of these metrics.

Call Flow

The **Call Flow** area graphically displays values for **Offered, Answered,** and **Abandoned** calls for the **Short, Medium,** and **Long** time profiles. This area is shown if you have access to any of these metrics.

- A bar graph displays the integer values of the metrics. **Answered** and **Abandoned** have a legend color box to represent a piece of the pie chart.
- A pie chart displays answered and abandoned percentages.
- You might see split statistics for metrics to which you have no access, but their tooltips are hidden.

Application Metrics

The **Application Metrics** area displays a box for each of the columns shown on the **Contact Centers** pane when you click the **launch** icon. The order of the **Application Metric** boxes matches the order of the columns on the **Contact Centers** pane.

You can scroll through the list of application metrics (independently of the Performance Monitor). A dynamic threshold violation indicator ( ) indicates a threshold violation that is out of sight.

To display a single **Application Metric** box on the desktop, click in the **Application Metric** box.

- You cannot display a duplicate Application Metric box.
- The title bar of the Application Metric box indicates the path of the selected row on the **Contact Centers** pane (for example, `Reporting Region - Contact Center : BMG - BEUC Blue - Arnold`).
- A copy of the **Application Metric** box remains part of the Performance Monitor.
- Now metrics have just one bar—they do not have bars for other time profiles.

Workforce What-If Tool

The Workforce What-If Tool enables you to test the effect of different actions on specific scenarios, and therefore enable you to make better decisions about where to allocate resources. You can forecast metric values, re-run calculations with new values, or test new scenarios for workforce allocation.

The Workforce What-If Tool is available with Contact Center Advisor only. Messages in the feedback area at the top of the calculator help walk you through the use of the tool.

- The Workforce What-If Tool uses full-time equivalent as the standard unit of measure for metrics calculations.
- Calculations are rounded to the nearest half-percentage, not the nearest percentage.

This section contains the following sub-sections:

- Workforce What-If Tool Operation
- What-If Scenarios

Workforce What-If Tool Operation

This section explains how to:

- Forecast Metric Values
- Re-run a Calculation with New Values

Forecasting Metric Values

To forecast metric values using the calculator:

1. Access the Workforce What-If Tool on your desktop by clicking the  button.
2. For each metric, click  to pin and type the input values.
    - You must select at least three input values, two of which must be from the first three fields:
        - **Calls**—Call Volume per Call Volume Dimension (minute, half hour, or hour)
        - **AHT**—Average Handle Time per AHT Dimension (seconds, minutes, or hours)
        - **Agents**—Number of Agents
        - **ASA**—Average Speed of Answer per ASA Dimension (seconds or minutes)
        - **SL**—Service Level % within SL Wait Time per SL Wait Time Dimension (seconds or minutes)
    - If a dimension is modified when there is already a value specified, the value is automatically updated to reflect the new dimension.
3. Click **Calculate.**

The desired values are calculated. The **Calculate** button is available when enough input values are provided to make the calculation. If any of the required or pinned values are missing, illegal (for example, negative), or problematic (for example, infinity), an error message appears.

Re-running a Calculation with New Values

To re-run a calculation:

1. Pin the metric ( ).
2. Set new values for the metric.
3. Click **Calculate.**

What-If Scenarios

The following scenarios show how to use the What-If Tool to plan operational adjustments to meet differing scenarios during a working day:

- Scenario 1—Typical call volume, agents call in sick
- Scenario 2—Achieving 80% SL with 55 agents
- Scenario 3—Call volumes fall, reduce staffing levels

Important

The Workforce What-If Tool does not account for shrinkage—the percentage of an FTE's time that is not productive. When you consider agent decisions using the Workforce What-If Tool, be sure to account for shrinkage using the value that is used by your company. For example, if shrinkage is 20% and the Workforce What-If Tool calculates that you need four agents, you really need five agents. This is because 20% of the time spent by the five agents is shrinkage, leaving four FTEs.

Scenario 1—Typical Call Volume, Agents Call in Sick

What does this do to your service levels, and what should you do about it?

How many agents are required for 80% SL?

1. Click and set the value of Calls to `10 per minute.`
2. Click and set the value of AHT to `300 seconds.`
3. Click and set the value of SL to `80% in 20 seconds.`
4. Click **Calculate.** 57 agents are required for service level at 80%.

What is the effect on SL of 3 fewer agents?

1. Click and change the number of Agents from 57 to `54.`
2. Unpin SL.
3. Click **Calculate.** SL% falls to `63.73%,` below your minimum acceptable of 70%.

How many agents do you need from other queues?

1. Unpin Agents.
2. Click and change the value of SL from `63.73` to `70.`
3. Click **Calculate.** The number of agents changes to `55,` which is acceptable.

Result:

By moving just one agent from another queue, you could restore a service level of 70%.

Scenario 2—Achieving 80% Service Level with 55 Agents

What instructions can you give to your 55 agents to lower the average handle time, and therefore to raise the service level to 80% (where your incentive pay remains safe)? There may be places in the call flow where you can decide to forego certain steps to save time, such as the step of inviting the caller to visit your new web page. Generally agents extend this invitation when the contact center is fully staffed, but now you may need to adjust to having fewer agents for a time.

What should AHT be for 55 agents and 80% SL?

1. Unpin AHT.
2. Click and set the value of **AGENTS** to `55`.
3. Click and change the value of **SL** from `70` to `80`.
4. Click **Calculate.** AHT must be around 294.

Result:

Instruct the 55 agents to skip the invitation to the Web site, just for this morning.

Scenario 3—Call Volumes Fall, Reduce Staffing Levels

Call volumes are falling off and expected to stay that way. How many people can you send home? As you let people go home, you do not want ASA to drop lower than 30 seconds.

How many agents are required when AHT is 300 seconds and ASA is 30 seconds?

1. Click and set the value of **CALLS** lower, from `10 calls per minute` to `500 calls per hour.`
2. Click and change the value of **AHT** back to `300 seconds.`
3. Unpin **AGENTS.**
4. Click and set the value of **ASA** to **30 seconds.**
5. Unpin **SL.**
6. Click **Calculate.** The number of agents drops to 46, but service level is below 70%, which is unacceptable.

What if you keep 47 agents instead of 46?

1. Leave **AGENTS** pinned ( ) and change the value of **AGENTS** from 46 to `47.`
2. Click **Calculate.** Service level rises to `77.5%,` which is acceptable.

Result:

Move the borrowed agent back to their original queue. Roll one agent off the phones each half hour, but only if service level remains at 80% or higher. You can expect to allow up to seven agents to go home (55 agents, minus a borrowed agent, minus 7 more, which results in the 47 agents you calculated for).