Contact Center Advisor and Workforce Advisor Administrator User's Guide

Objects in the Administration Module

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Objects in the Administration Module

Before you configure relationships, it is important to note that there are some dependencies that affect your ability to configure data in the Administration module:

- Review the *Performance Management Advisors 8.5.0 Deployment Guide* to ensure you have completed all deployment requirements. Also review the Post Installation Configuration topics in that book.
- Run Contact Center Advisor XML Generator to pull from the external data source systems the base objects you will configure in the Administration module. Until you do this, no switches/peripherals, applications, or agent groups will appear in the user interface.
- Run Workforce Advisor server to pull from the external WFM systems the contact groups you will configure in the Administration module. If you are using IEX TotalView, then use FTP as detailed elsewhere to push its contact groups into the Advisors Platform database. Until you do this, no contact groups will appear in the user interface.

Overview of Administration Module

Menu options for the Administration module are controlled by role-based access set up in the Configuration Manager. Administrators will see only menu items for which they have privileges assigned.

To display metrics' values on dashboards, multiple procedures must be completed and base objects must be configured. You use the following Administration module pages to configure objects and relationships for display on the Contact Center Advisor and Workforce Advisor dashboards:

- System Configuration:
    - Contact Center Advisor/Workforce Advisor: To configure:
        - Notification refresh rate: how often Advisors sends e-mail about alerts.
        - Application to agent group relationships
        - Show Totals and Averages row for agent groups: Whether or not the Totals and Averages row appears in the Agent Groups pane in Contact Center Advisor and Workforce Advisor.
        - Threshold trigger delay rate: How long a metric's value must exceed a threshold before Advisors creates an alert about it.
        - Display agent group contact center column: Whether this column appears in the Agent Groups pane in Contact Center Advisor.
        - Integrated CCAdv/WA configuration: See Configuration Modes.
        - Default grouping: in the Contact Centers pane in the dashboards.
    - Data Source: To set how long an external source of real-time data can be quiescent before Advisors notifies users about it, and the distribution list to use to send the e-mail.
    - Modules: To modify the application name that displays on the dashboard tabs.

  See System Configuration.

- Regions: Complete the configuration of regions to represent the subdivisions of your company's business operations. See Regions.
- Application Groups/Thresholds: To provide a meaningful configuration of types of contact center activity in the dashboards, complete the configuration of application groups (see Application Groups and Thresholds). Threshold rules define the critical (red) and warning (yellow) conditions that trigger threshold violations, at the application group level. To define the critical and warning conditions for each metric in the context of an application group, see Adding or Updating Thresholds.
- Contact Centers: Complete the configuration of contact centers for a data source that supplies applications and agent groups, and select a geographic region for each; see Configuring Contact Centers.
- Switches/Peripherals: To enable or disable a Genesys switch or Cisco peripheral as far as Advisors is concerned. (A peripheral is a communications interface between a call distributor and call router.) To change this status, see Switches and Peripherals.
- Application Configuration:
    - Rollups: To configure the hierarchy displayed on the dashboard, create the associations between applications, agent groups, and the levels in the hierarchy (for example, regions, contact centers, and application groups).
    - Applications – Agent Groups: Assign agent groups to applications.
    - Application Details: Define descriptive names for applications and change their settings for zero suppression, being displayed on the dashboard, and SL Threshold.
- Contact Group Configuration: (WA only)
    - Rollups: To configure the hierarchy displayed on the dashboard, create the associations between contact groups and the levels in the hierarchy (for example, regions, contact centers, and application groups).
    - Contact Groups–Applications: Assign applications to contact groups.
    - Contact Groups–Agent Groups: Assign agent groups to contact groups.
    - Contact Group Details: Define descriptive names for contact groups and change their other properties.
- Agent Group Configuration: Map agent groups to an agent-group contact center. Configure agent groups to display on the dashboard. See Agent Group Configuration.
- Metric Manager: Define the many properties of a metric, such as its descriptive name. See Metric Manager.
- Users: All creation and configuration of users is now carried out in the Genesys Configuration Manager. See Advisors Business Objects.
- Distribution Lists: To group users who are sent e-mail about alerts based on a specific alert type, add distribution lists and select the users, contact centers, and application groups you want to relate to the distribution list. See Working with Distribution Lists.
- Manual Alerts: Add manual alerts and specify the alert type and affected contact centers. See Manual Alerts.
- Alert Causes: Add and approve alert causes used in Action Management reports. See Alert Causes.
- Key Actions: Add and approve key actions used in Action Management reports. See Key Actions.
- Manage Adapters: The Manage Adapters page is read-only; you can view information about adapters on this page. You no longer select an adapter before performing object configuration.

- Base Object Configuration: You can view and maintain the list of agent group, queue, and filter combinations. See Base Object Configuration
- Notification Lists: If Resource Management is installed, notifications lists are used to inform groups of users within an organization about changes being made to the agents or resources. To view and maintain notification lists, see Notification Lists.
- Notification Templates: If Resource Management is installed, provide standard content for e-mails describing the directives and actions taken from Resource Management. To view and maintain notification templates, see Notification Templates.