Frontline Advisor Agent Help

Pulse Advisors 8.5.0

12/27/2022

Table of Contents

Welcome to Frontline Advisor Agent Help

Frontline Advisor for Agents (Agent Advisor) gives you a real−time view of your activity. Customizable alerts draw immediate attention to performance−related activity, good or otherwise.

Agent Advisor puts everything you need to track your progress in a single location, so you can capture the top−priority issues and quickly direct your attention to areas that may require attention.

Current status, performance, behavior, and activity-based data can be presented in customized views. Sophisticated, configurable business rules monitor key performance indicators and call attention to situations requiring immediate attention.

Agent Advisor is designed to help you raise your performance, enabling you to instantly identify activities that need correction or additional training, as well as areas where you are performing optimally.

Agent Advisor Interface

Agent Advisor is divided into two panes:

- **Team**—Your team number or name displays in the gray tab on the left, and the columns in the pane give your overall status in real time. Time profiles as well as channels are displayed for your performance metrics.
- **My Alerts**—Displays the details of your alerts.

Role−based Access

Access to alerts and metrics is controlled by roles defined by the administrator (role−based access). This means that you can only see alerts and metrics (and reports that concern such metrics) to which the administrator specifically grants access.

When you have access to a metric or alert:

- You see the metric on the dashboard.
- You see the metric on the column chooser.
- You see alerts for the metric, and receive alert notifications.

The Team View

The **Team** view is where you focus on your overall status in real time. The information is updated and refreshed by default every 10 seconds for state data and by default every 10 minutes for performance data. The refresh rate is configured by the administrators.

Important

Access to metrics is controlled by user roles defined by your administrator (role−based access). Only metrics to which you have access are displayed in the **Team** view.

Some default columns include:

- **Alert State**—The agent's current alert state is indicated by a colored icon. In addition to red and green, a gray icon indicates the agent is not logged in.
- **Agent Name**—The first initial and last name of the agent.
- **State**—The agent's current state. The following list displays the available agent states in alphabetical order.
    - After Call Work
    - Agent Work Not Ready
    - Call Conferenced
    - Call Dialing
    - Call Held
    - Call Initiated
    - Call Internal
    - Call Outbound
    - Call Unknown
    - Logged Off
    - Logged On
    - Monitored
    - Not Monitored
    - Not Ready
    - Off Hook
    - On Hook

Ready

Talking

- **Time in Current State**—The amount of time that the agent has been in the current state (minutes:seconds).
- **Reason Code**—A code indicating the reason for the agent's most recent change of state.
- **Agent ID**—The agent’s identification.
- **Login Time**—The login date and time of the agent.
- **Current Skill**—The agent’s current skill (column availability is dependent on the Frontline Advisor configuration in your enterprise).
- **Call Type**—The current call type (column availability is dependent on the Frontline Advisor configuration in your enterprise).

Viewing Your Team's Status

The **Team Status Bar** displays team performance metrics and statistics.

> **Important**
> Access to metrics is controlled by user roles defined by your administrator (role-based access). Only metrics to which you have access are displayed in the **Team** view.

Your team’s status displays how many agents are logged in and other state information (for example, talking, available, not ready, wrap, hold, and the number of alerts).

- Click the **Statistics** () icon in the **Team** view to display your team’s status.
- Click the **Performance** () icon in the **Team** to display performance metrics and values.

My Alerts

Important

The **My Alerts** view is hidden if you have not been granted access to it.

The details of your active and inactive alerts are displayed in the **My Alerts** view. Your name displays beside the **My Alerts** view.

- Active alerts are those for which the rule is currently being violated.
- Inactive alerts are those for which the behavior has been corrected and the rule is no longer being violated. Inactive alerts are removed and archived if the rule is not violated for a period equal to the time period of the rule.

Violations are displayed by default in reverse chronological order.

The details of the **My Alerts** view include:

- **Alert**—The alert's status (red for active, green for inactive). Values do not update in the **My Alerts** view until you log in.
- **Time**—The time when the alert was last triggered (hh:mm).
- **Alert Detail**—The rule description.
- **Note**—A note for the alert from your supervisor.

Printing Your Performance

You can view your performance in a formatted report. The report is generated as a PDF file. One of the prerequisites to view the PDF file is to have a PDF viewer installed on the machine where the PDF document will be viewed.

When you click the **Print** button for a particular pane in the dashboard the PDF file is generated. One of the following two things can happen:

- If your machine has a default PDF Viewer (like Acrobat Reader), the data will appear in the PDF Viewer. You can then save or print the document using the PDF Viewer.
- If your machine does not have a default PDF Viewer, an `Opening FA.pdf` window will appear. You can then select to open the PDF with a PDF Viewer application or save the PDF file on the disk.

Printing the My Alerts View

You can print the alerts from the **My Alerts** view in a formatted report by clicking the **Print** button. The data is formatted as a PDF report and can be saved or opened using the PDF Viewer. The PDF document can be printed using the PDF Viewer.

The report displays the following:

- Your name
- The alert detail
- The time the alert was issued
- A note from your supervisor

Printing the Team Statistics

You can print information currently displayed in your **Team** view by clicking the **Print** button. The data is formatted as a PDF report and can be saved or opened using the PDF Viewer.

The printed Team report contains all statistics currently in view (such as agent alert state, agent state, team state, or performance metrics).

User Status/Violation Status Button

You can use the **User Status** button () to monitor the status of alerts while Frontline Agent Advisor runs in the background.

When you trigger an alert, the icon turns red.

> ### Tip
> You may want to keep the **User Status** button on your desktop, and then if it changes color, open Frontline Agent Advisor to see the details.

Monitoring Using Thresholds and Rules

Important

Access to metrics, time profiles, thresholds and rules is controlled by user roles defined by your administrator (role−based access). Only metrics, time profiles, thresholds and rules to which you have access are visible.

Thresholds and rules are defined in the **Administration** module by users with one of the administrator roles. Thresholds define the critical, warning, and acceptable conditions for each metric. Thresholds and rules can be used to find positive behavior as well.

The metrics and the metrics' time profiles that are available on the column chooser are determined by administrators.

Thresholds

Important

Access to metrics, time profiles, thresholds, and rules is controlled by user roles defined by your administrator (role−based access). Only metrics, time profiles, thresholds, and rules to which you have access are visible.

A threshold compares a measured value at a point in time to a threshold range to determine the status. Depending on the metric, a value may be acceptable above or below a certain value. Some thresholds trigger an alert if the value is below or above defined values.

For example, assume a goal within your contact center is for each agent to handle no more than five calls and no fewer than two within a 10−minute interval. If you work within these *thresholds*, then you are providing optimum customer service based on your contact center's goals. You are giving each customer enough of your time, but not too much (you are not keeping other customers waiting). If you handle fewer than two calls or more than five calls within a 10-minute interval, an alert is triggered.

Tip

Learn to make use of alerts to align your performance with your contact center's goals.

Rules

> **Important**
> Access to metrics, time profiles, thresholds and rules is controlled by user roles defined by your administrator (role-based access). Only metrics, time profiles, thresholds and rules to which you have access are visible.

Rules are conditions that continuously monitor statistics. Alerts help to focus your attention on the most important issues affecting performance. Rules also count events throughout an interval of time, which allows them to trigger alerts based on the frequency of events.

Rules evaluate and trigger on agent metrics, but not on team metrics.

The frequency of an alert is a leading indicator of good or bad trends. It is good practice to learn to make use of alerts to quickly focus on problem areas.

For example, an agent might have more than ten agent calls transferred in the past ten minutes. If a rule is triggered based on this high frequency of transferred calls, an alert is generated.

Types of Thresholds and Rules

The five types of thresholds and rules are:

Class	Explanation	Action
Threshold	Based on a count	Change text red or yellow
Threshold	Based on an average or maximum time value	Change text red or yellow
Threshold	Based on the duration of an agent’s state	Change text red or yellow
Rule	Based on the frequency of calls held or calls transferred	Issue a red alert
Rule	Based on the frequency of (long or short) call durations or wrap times	Issue a red alert

Agent Alert Indicators

Red indicates at least one critical alert.

Green indicates no alerts are active: the value is normal.

A gray icon indicates the agent is not logged in.

Customizing The Display

> **Important**
> Access to metrics is controlled by user roles defined by your administrator (role−based access). Only metrics to which you have access are visible.

The following topics describe options for customizing the display of Frontline Advisor.

Using Column Chooser

Ordering the Metrics

Sorting the Views

Adjusting the Width of Columns

Resizing the Views

Persistent Settings

Using Column Chooser to Select Metrics

> **Important**
> Access to metrics is controlled by user roles defined by your administrator (role−based access). Only metrics to which you have access are displayed on the **Column Chooser**.

Overview

Use the **Column Chooser** to select the metrics to display on your dashboard. You can select many metrics for multiple time periods and for multiple channels (for example, voice, Web chat, or e-mail) in the **Column Chooser**.

The **Column Chooser** has two panes:

- **Selected Metrics**—The metrics to display on the dashboard. You can select and move metrics from this pane to the **Available Metrics** pane.
- **Available Metrics**—All available metrics that are not in the **Selected Metrics** pane. Metrics in the **Available Metrics** pane do not display on your dashboard. You can select and move metrics from this pane to the **Selected Metrics** pane.

Change the size of the display area in the **Selected Metrics** and **Available Metrics** panes by dragging the splitter between the two panes.

Specifying the Metrics to Display on the Dashboard

You can specify the metrics that display on your dashboard.

1. Click the **Column Chooser** button to open the **Column Chooser** window.
2. Use the **Select** drop−down menu to choose the list of metrics to display in the **Selected Metrics** pane. The options are described in the Column Chooser Feature Descriptions table. You can then add metrics to, or remove metrics from, this initial list.
3. To modify the dashboard display, use the following commands:
    - To *remove* a metric from your dashboard display, click the yellow pin icon in the row for that metric in the **Selected Metrics** pane. The metric moves to the **Available Metrics** pane. The metric no longer displays on your dashboard after you click **OK** to apply your changes.
    - To *add* a metric to your dashboard display, click the pin icon in the row for that metric in the **Available Metrics** pane. The metric moves to the **Selected Metrics** pane. The metric displays on your dashboard after you click **OK** to apply your changes.

- To *filter* the list of metrics that display in the **Available Metrics** pane, use the options at the top of the **Available Metrics** pane. The options are described in the Column Chooser Feature Descriptions table.
- To *find* a specific metric in the **Available Metrics** pane, enter text in the **Search** field.
  For example, to find any metric with "handled" in the name or description, enter "handled" in the **Search** field, and then click  beside the **Search** field or hit **Enter** on your keyboard.
- Optionally, *sort* the metrics in the **Available Metrics** pane by clicking on column headers.

Column Chooser Feature Descriptions

The following table describes additional features of the **Column Chooser** window.

Feature	Description
Select drop−down menu	Use this menu to specify which metrics display in the **Selected Metrics** pane. Options include: • From Dashboard: the **Selected Metrics** pane displays the metrics in the order in which they appear on the dashboard. This is the default option. • Default: the **Selected Metrics** pane displays the metrics that are shown by default on the Dashboard.
Available Metrics pane filter options	Use the filters on the **Available Metrics** pane to more efficiently find specific metrics to add to the **Selected Metrics** pane. For example, to include metrics for the Voice channel and exclude metrics for the E−mail and Web Chat channels, ensure that the Voice check box in the Channel filter is selected and the E−mail and Web Chat check boxes are cleared. The filter options on the **Available Metrics** pane include: • filter by Channel • filter by Object Type (present in the Frontline Advisor Manager interface only) • filter by Metric Type • filter by Time Period • filter by initial letter of the metric name
OK button	Applies the selected metrics to the dashboard, closes the **Column Chooser** window, and saves the following to your preferences: • filters states

Feature	Description
	• selected metrics and their order
Cancel button	Cancels the changes that are not yet applied and closes the **Column Chooser** window.

Ordering the Metrics

You can change the order in which the metrics display by dragging a column heading to another location in the view. However, note the following default behavior:

- The default columns always display to the left of the optional columns.
- You cannot hide or move the default columns.

Personalized settings are linked to your user ID, so they appear wherever you log in.

Sorting the Views

- You can sort a view by clicking a column heading.
- You can sort the view in ascending or descending order.

> **Tip**
> Sorting by the **Alerts** column is a great way to see all red alerts first. A sort triangle indicates the direction.

The sorting persists if you log out and then log back in.

Adjusting the Width of Columns

If one or more columns are either added to the display or removed from the display, the width of the visible columns adjusts accordingly.

There is a minimum default width.

Adjust the width of individual columns by dragging the pointer when it changes to a  near the column break.

Resizing the Views

You can resize the height of each view by dragging the splitter up or down.

Persistent Settings

When you log out and in (to any machine) or return from another Advisors module, the Agent Advisor module retains the following:

- Column selection, sorting and widths.
- Location of the splitters.