Frontline Advisor Administration User's Guide

Source Metrics

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Source Metrics

Contents

NEW You manage source metric definitions from the Genesys Stat Server data source, also called Statistic definitions, in the Source Metric Manager.

You can perform the following actions in the Source Metric Manager:

- View the source metrics.
- Create and edit new custom source metrics.
- Delete custom source metrics.

Fields and options on the **Source Metric Details** page, on which you can create custom source metrics, are dependent on one another. For example, the `Subjects` drop-down list is populated based on your selection in the `Objects` list. As you make selections, other lists, options, and fields update to offer only applicable properties.

Use `Queue` object type source metrics with both ACD queues and virtual queues.

For information about source metrics and source metric attributes, see documentation for the Real-Time Metrics Engine (Stat Server), particularly the Framework 8.1 Stat Server User's Guide and the Reporting Technical Reference.

Customizing the Stat Server CurrentState Source Metrics

New custom source metrics cannot be created for the Stat Server categories of `Current State`, `Current Target State`, and `Current State Reasons`. There are source metrics supplied out-of-box for these categories, and the customization available on these metrics is limited. For example, the Reason Code Key is configurable, but it is not possible to extract agent readiness based on capacity rules for a non-voice channel.

Relationships between Source and Report Metrics

The following Table lists the relationship between the source metrics and the report metrics on the **Report Metrics** page.

If the Genesys Source Metric `Object` field belongs to one of the below object types	Then the Source Metric is Available for this Report Metric Object Type
Agent	Agent
GroupAgents	Agent Group
Queue	Application
StagingArea	Application
CallingList	Application

If you select `Queue`, `StagingArea`, or `CallingList` in the Genesys source metric `Object` field, then that source metric will be available for selection for application object type report metrics.

`GroupAgents` object type source metrics will be available for selection for agent group report metrics. `Agent` object type source metrics will be available for selection for agent metrics in Report Metrics manager.

Source Metrics and RBAC

If you have sufficient privileges to see the **Source Metrics** page, then you can view all existing statistics definitions. There is no role-based access control on the individual statistic definitions.

RBAC privileges also manage the following:

- A user's ability to create custom source metrics
- A user's ability to edit source metrics
- A user's ability to delete source metrics

See CCAdv/WA Access Privileges and FA Access Privileges for the list of privileges associated with the Source Metric Manager.

Working with Source Metrics

A custom source metric that you create is immediately available for use in the creation of a report metric.

The source metrics that ship with Advisors (out-of-box metrics) cannot be edited, with the exception of the Reason Code source metric, for which you can edit the following attributes:

- Reason code Key
- Reason Start Overrides Status Start

For users with `Edit` privileges:

- The `Edit` button is present and enabled if a selected metric is a custom metric (not an out-of-box source metric).
- The `Edit` button is absent or disabled if a selected metric is an out-of-box source metric.
- When editing a source metric with dependent report metrics, a warning message indicates that the edit will affect the dependent metric(s).
- You cannot change the category for an existing source metric from `Current` to `Historical`, nor the reverse.

The source metrics that ship with Advisors (out-of-box metrics) cannot be deleted. You can delete a custom source metric provided no report metric is derived from it.

For users with `Delete` privileges:

- The `Delete` button is present and enabled if the selected metric is a custom metric (not an out-of-box

source metric).

- When attempting to delete a custom source metric that has dependent report metrics, an error message indicates that you cannot delete the metric because of the dependent report metric(s).

Category Options

A statistic category is either a `Current` category or a `Historical` category. The `Current` category is the current value of the evaluated measurement in the Stat Server. The `Historical` category means the metric is evaluated over a specific time interval (the time profile).

JavaCategory source metrics can be either `Current` or `Historical`; you can specify which to use based on your requirements.

Main Mask/Relative Mask Wild Cards

Wild cards such as * to select all options or ~ to exclude a mask are implicitly supported in the `Main Mask` and `Relative Mask` editing windows. Use the `Select All` feature at the bottom of the editing window to select all options and then selectively deselect one or more options with the radio buttons.

For example, if `MainMask = *, ~LoggedOut`, do the following in the `Main Mask` editing window:

1. Use `Select All: Selected` to select all the options in the window.
2. Click the `LoggedOut` radio button to deselect it.

Filtered Source Metrics

When you select a source metric on the **Source Metrics** page, the attributes for that metric are displayed in the lower half of the page, including the `Filtered Source Metrics` table in which you can create a filter for the metric.

To apply a filter to a selected metric, specify the following in the `Filtered Source Metrics` table:

- Name of the filter
- A description for the filter
- The filter: A filter must be one that is available in the Configuration Server **Business Attributes** > **Advisors Filters** section.

You can add as many filters to an unfiltered source metric as you require; each filtered version becomes a new source metric.

You can edit filtered source metric properties. You can also delete a filtered source metric if no report metric is using a filtered variation. This includes filtered source metrics defined on out-of-box metrics; they can be edited or deleted.

Each filtered variation is stored on a database table separate from the source metric table.

Finding Filtered Source Metrics in the Source Metrics Manager

Filtered source metrics are variations of other parent source metrics; you can find the filtered source metrics only under the respective parent source metric. For example, to find the filtered variations of a source metric called `Retrieved Calls`, navigate to the `Retrieved Calls` source metric and select it. The filtered variations are displayed in the details in the lower half of the page.

Customizing the Stat Server Current Target State Source Metrics

Starting in release 8.5.001, you can create custom source metrics for the Stat Server category of `CurrentTargetState`.

In release 8.5.0, the following out-of-box metrics were available in the Metric Manager, and were evaluated from the Current Target State source metric. In release 8.5.001, these metrics based on Genesys Stat Server data are no longer shipped with Advisors because you can create your own custom metrics based on the Current Target State metric.

Object Type	Report Metric	Reporting Application
Application	Avail Voice	CCAdv
Agent Group	Avail Voice	CCAdv
Agent	Voice Ready	CCAdv
Agent	Voice Ready	FA

Creating a Custom Source Metric for the CurrentTargetState Category

In release 8.5.001, Advisors Genesys Adapter can extract agent media-capacity information from the default (out-of-box) Current Target State source metric. An example of media-capacity is the maximum number of chat interactions that an agent can handle simultaneously.

You use the default Current Target State source metric that is supplied with Advisors and the **Filtered Current Target State Source Metrics** section of the Source Metrics Manager to configure your specific Current Target State attributes. The default (out-of-box) Current Target State source metric supports both agent and agent group object types.

Click the **Edit** button in the **Filtered Current Target State Source Metrics** section of the Source Metrics Manager for the Current Target State source metric.

The **Create** dialog box – instead of presenting filters – offers the following attributes:

- Type (that is, the Current Target State attribute type; only Media Capacity is available in release 8.5.001)
- Capacity Media Type
- Capacity Attribute

All media types registered in the Genesys Configuration Server under **Business Attributes > Media Types** are listed under the **Capacity Media Type** option.

The following options are available for **Capacity Attribute**:

- Routable Interactions Count (also known as Current Margin Count)
- Maximum Interactions Count
- Current Interactions Count

Create an enabled raw report metric for either CCAdv or FA based on each of the source metrics with the filtered media capacity attribute. You can create a raw report metric to display on the dashboard, or you can use the raw report metric to create other calculated report metrics.

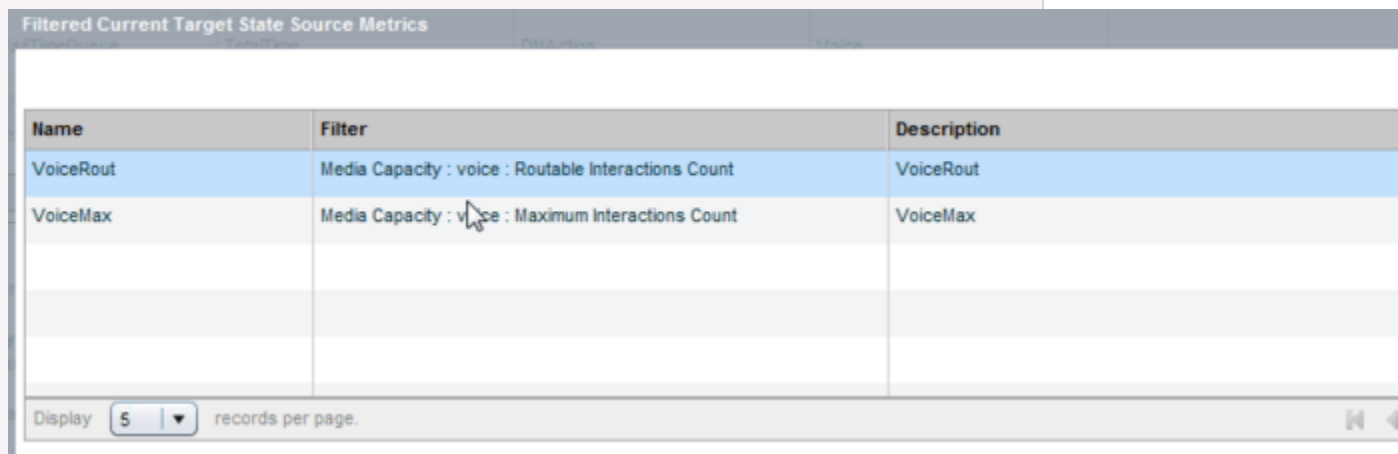## Current Target State Metrics and Agent Groups

When the Current Target State metric is reported, AGA extracts the configured media capacity attributes for each agent in an agent group. The corresponding metric at the agent group level is evaluated based on the media capacity attribute at the agent level. Therefore, for all the media capacity attributes that Genesys supports in release 8.5.001, a formula of **SUM** is used to evaluate the agent group level metric value from the agent level attribute value.

Current Target State Metrics and Metric Applicability

You can configure metric applicability for the custom Current Target State report metrics in the same way that you configure applicability for any other raw report metric.

Example: Using Metrics Based on Current Target State

While an agent might manage many chat or email interactions simultaneously, that same agent can typically manage only one voice interaction at a time. To track an agent's availability for routable voice interactions using metrics on the dashboard, you could create report metrics based on the Current Target State metric that ships with Advisors. For example, the following screenshot shows two custom source metrics – VoiceMax tracks the maximum number of voice interactions for an agent and VoiceRout tracks the availability of the agent to handle a voice interaction.

Filtered Current Target State Source Metrics

Name	Filter	Description
VoiceRout	Media Capacity : voice : Routable Interactions Count	VoiceRout
VoiceMax	Media Capacity : voice : Maximum Interactions Count	VoiceMax

Display 5 records per page.

Custom source metrics based on the out-of-box Current Target State source metric

You would then create custom raw report metrics that use those custom source metrics as the foundation. The following screenshot shows an example of custom report metrics.

Name	Display Name	Channel	Advisor ...	Object T...	Thresho...	Enabled	Initial Se...	Time Pr...
CM__1	VoiceRoutableInteractions	Voice	Contact C...	Agent Gr...	No	Yes	0	Point in Ti...
CM__2	VoiceMaxInteractions	Voice	Frontline ...	Agent	Yes	Yes	0	Point in Ti...
CM__3	AgentVoiceRoutableIntera...	Voice	Frontline ...	Agent	Yes	Yes	0	Point in Ti...

Display 30 ▼ records per page.

Details

Short Name CM__2	**Enabled** Yes	**Time Profile for Charting** N/A	**Calculat** Raw
Display Name VoiceMaxInteractions	**Display over 100** Yes	**Decimal** 1	**Summa** SUM
Expression Field VoiceMax	**Initial Sequence Number** 0	**Threshold Applicable** Yes	**Channel** Voice
Description VoiceMaxInteractions	**Time Profile** Point in Time	**Threshold / Chart** N/A	**Object T** Agent

Custom report metrics that use the previously-created Current Target State–based source metrics

After you create and save the enabled custom report metrics, they are available in the Advisors column chooser so you can display the metrics on the dashboard. In this example, which uses the Frontline Advisor dashboard, the custom report metric that tracks an agent's availability to take calls is the AgentVoiceRoutableInteractions metric. The VoiceMaxInteractions metric tracks the maximum number of voice interactions (calls) an agent can handle simultaneously.

The following screenshot shows one ready agent (J. Davis) and two logged-off agents. Note that the AgentVoiceRoutableInteractions metric indicates that only the agent in the Ready state is available for a voice interaction.

Agent Name	Average Handle 10Min	Alert State	Login Time	Calls Handled 10Min	Reason Code	Call Type	Current Skill	State	Time In Curren
J. Davis	0	☐	09:18:02 AM 0...	0	N/A	-	-	Ready	34:07
F. Craig	0	⊖	07:00:00 PM 1...	0	N/A	-	-	Logged Off	5523:28
J. Miller	0	⊖	07:00:00 PM 1...	0	N/A	-	-	Logged Off	5523:28

An agent in the Ready state is available to take a call. The AgentVoiceRoutableInteractions metric has a value of 1 for the ag VoiceMaxInteractions metric indicates that the agent can handle a maximum of 1 call at any one time.

If that agent should take a break, or be on the phone, the AgentVoiceRoutableInteractions metric indicates that the agent is no longer available for any further calls.

Agent Name	Average Handle 10Min	Alert State	Login Time	Calls Handled 10Min	Reason Code	Call Type	Current Skill	State	Time In Curren
J. Davis	0	☐	09:18:02 AM 0...	0	Break : 1012 (...	-	-	Not Ready	00:01
F. Craig	0	⊖	07:00:00 PM 1...	0	N/A	-	-	Logged Off	5524:28
J. Miller	0	⊖	07:00:00 PM 1...	0	N/A	-	-	Logged Off	5524:28

An agent in the Not Ready state is unavailable to take a call. The AgentVoiceRoutableInteractions metric has a value of 0 fo

Agent Name	Average Handle 10Min	Alert State	Login Time	Calls Handled 10Min	Reason Code	Call Type	Current Skill	State	Time In Current
J. Davis	0	☐	09:18:02 AM 0...	0	N/A	-	-	Talking	00:00
F. Craig	0	⊖	07:00:00 PM 1...	0	N/A	-	-	Logged Off	5525:38
J. Miller	0	⊖	07:00:00 PM 1...	0	N/A	-	-	Logged Off	5525:38

An agent in the Talking state is unavailable to take a call. The AgentVoiceRoutableInteractions metric has a value of 0 for th