Contact Center Advisor and Workforce Advisor Administrator User's Guide

Advisors Business Objects

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Advisors Business Objects

Contents

Role-based access to business objects and metrics is configured in Genesys Administrator.

> **Important**
> You must use Genesys Configuration Manager to add or edit privileges associated with roles. Roles, and related configuration, are stored in the Genesys Configuration Server.

Advisors business objects are created and related to access groups or persons in Genesys Administrator.

These objects are then synchronized with the Advisors database, and the administrator can then configure the remaining information for each object along with the necessary relationships by using the Advisors administration module.

Advisors metrics are related to access groups or persons in Genesys Administrator.

Business objects and metrics can be made active or inactive in the administration module.

These items are not represented as standard objects in Genesys Administrator. The business attribute values contain just the ID and name of the object. You can enter a description for a business attribute in Genesys Administrator, but Advisors does not import it into the Advisors database, or use the description in any other way.

Object State in Genesys Configuration Server and the Impact to Advisors Configuration

After an object has been imported from the Genesys Configuration Server into the Advisors administration module, the state of that object (enabled or disabled) in Configuration Server has no impact on the Advisors applications or configuration. For example, if you disable an ACD queue using Genesys Administrator Extension (GAX), that queue will continue to display on the **Base Object Configuration** page in the Advisors administration module. If you disable a User in Genesys Administrator, and that User was previously imported into Advisors configuration, then that User can continue to log in to the Advisors applications.

To delete an object so it is no longer available for configuration in Advisors, see Deleting an Advisors Object from Configuration Server.

Business Objects

Business objects (reporting regions, geographic regions, operating units, contact centers and application groups) are:

1. Created initially in Genesys Administrator under a single tenant as business attributes.
2. Related to access groups or persons to assign permissions to see them.
3. Synchronized with the Platform database.

4. Subsequently configured to completion in the Advisors administration module.
5. Deleted only in Genesys Administrator (although they can be removed from Advisors without deleting them from Genesys Administrator).

The Genesys Management Layer database is the master record holder for these Advisors business objects. Consequently, all create and delete functions are performed in Genesys Administrator.

Agent-group contact centers are not configured in Genesys Administrator. They are added as children of network contact centers during network contact center configuration in the Advisors administration module. All users that have permissions to see network contact centers are allowed to see the whole set of the related agent-group contact centers.

Metrics

Metrics are created in the Platform database when you install Advisors. Then they are configured in the Advisors administration module.

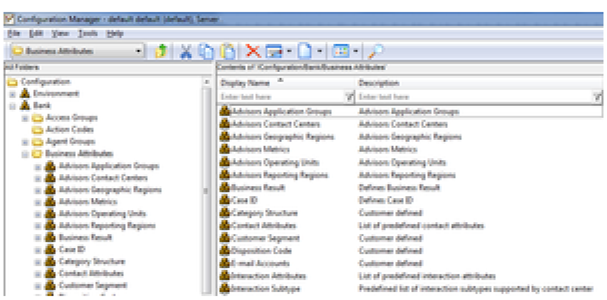
You use Genesys Administrator to assign permissions to access groups and to persons to determine whether the users can see the metrics in the administration module and in the dashboards.

> **Important**
>
> In release 8.5.1, you must use Genesys Configuration Manager to add or edit privileges associated with roles.

Deleting a metric from Genesys Administrator does not delete it from Advisors, but does hide it in any functionality that would otherwise show it.

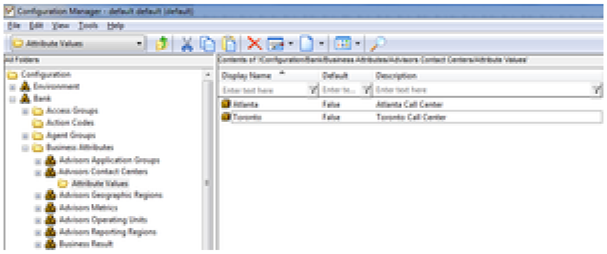
Examples

The following screenshot shows the Advisors business attributes in Configuration Manager.



Configuration Manager Business Attributes

Under each Configuration Manager business attribute, there is a folder that contains the list of attribute values. These attribute values represent the individual objects for this object type. For example, if there are two contact centers (Atlanta and Toronto) being configured in CCAdv, the Configuration Manager metadata would look as follows:



Configuration Manager Business Attributes—Individual Objects

Users

Users are configured entirely in Genesys Administrator. There is no user configuration functionality in the Advisors administration module.

> **Important**
> In release 8.5.1, you must use Genesys Configuration Manager to add or edit privileges associated with roles.

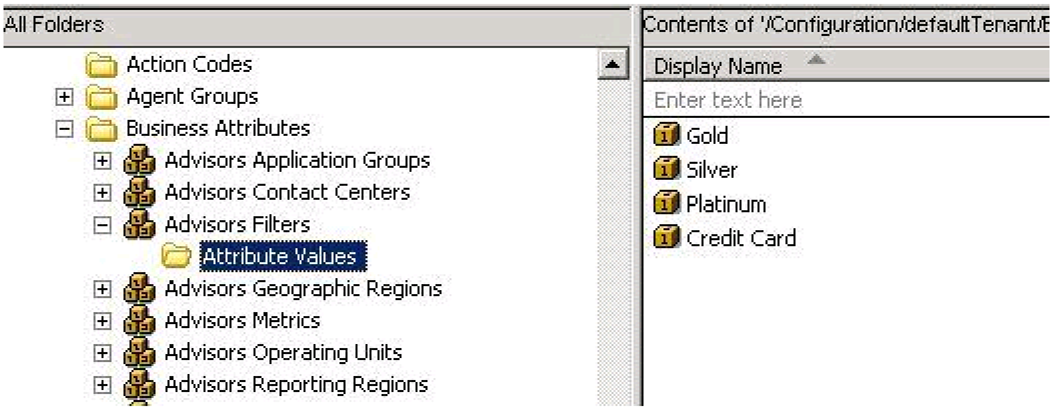
Region Types

A region represents a subdivision of the business operations of your company within each of the following views:

- Geographic is based on the physical location of the contact center. The applications and contact groups within a contact center fall under only one geographic region.
- Reporting Region is management-based. Applications and contact groups within a contact center may fall within multiple reporting regions.
- Operating Unit is based on the defined groupings of your company that are summarized and displayed on the Operating Unit view. Applications and contact groups within a contact center may fall within multiple operating units.

Filters

The master list of filters for Advisors (for CCAdv, WA, or FA) comes from the Configuration Server. **Advisors Filters** are part of the **Advisors Business Attributes** section (see the following screenshot).



Advisors Filters business attribute in Configuration Manager

The **Advisors Filters** business attribute must exist on one – and only one – tenant. Genesys recommends you configure the **Advisors Filters** business attribute on a tenant that is the default tenant for the Advisors suite installation, on which you configure all Advisors metadata. If there are **Advisors Filters** business attributes configured on multiple tenants, you receive an error message on the Advisors Genesys Adapter installation and the filters are not loaded.

If filters are associated with configured objects on the **Base Object Configuration** page in the administration module, the filter and object combination is stored on the **Annex** tab of the object's **Properties** window.

Creating an Advisors Object as a Business Attribute

When creating an Advisors object as a business attribute value in Genesys Administrator, the following fields are required. **Name** and **Tenant** are mandatory for completing the new object in Genesys Administrator.

- **Name**: For business objects, **Name** is the name of the object. It becomes the name of the object in Advisors.
  For metrics, this field is a concatenation of [Application].[ObjectType].[Channel].[Name]. For more information, see Creating Metrics. This name is not the metric's display name in Advisors. Enter a metric's display names in the Advisors administration **Report Metrics** page.

> **Warning**
> Once an object/business attribute value is created, the **Name** field cannot be changed.

- **Tenant**: The tenant to which this Advisors object belongs. You choose the tenant when installing Advisors Platform, and cannot change it in Genesys Administrator.

- **Display Name**: The name of the object to display in Genesys Administrator. Advisors does not use this display name.
- **Description**: A simple description of this object. For a filter, enter the filter expression in the **Description** field. For any object other than a filter, Advisors does not use this description.

Required Permissions

To create a business attribute, you must have `Create` permission with respect to the business attribute folder or sub-folder in which the object will reside. `Create` permissions are configured for you by a super administrator.

Deleting an Advisors Object from Configuration Server

Genesys recommends that you do not delete Advisors objects from Configuration Server until all their interdependencies and relationships in the Advisors configuration have been correctly processed. That is, do not delete Advisors objects before removing the rollup associations to regions, application groups, contact centers, contact groups and agent groups.

Required Permissions

To delete a business attribute, you must have `Delete` permission with respect to the business attribute folder or sub-folder in which the object resides.

Synchronization of Business Objects

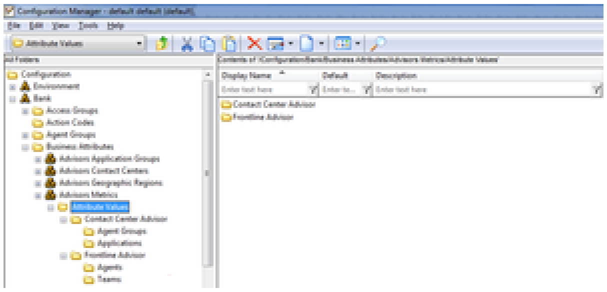
When a new business object is created in Genesys Administrator and saved, Advisors automatically propagates it to the Advisors Platform database. It appears in the administration module marked as not configured and inactive. Its remaining attributes must be configured in the Advisors administration module.

Once this is complete, the object is available and can be used in Advisors.

Changes made in the Advisors administration module are not stored in the Configuration Server.

Creating Metrics

Metrics are handled differently from other Advisors business objects. Because metrics for CCAdv, WA and FA are stored under the **Advisors Metrics** business attribute, a folder structure has been created to segment the metrics for each application and for each object. See the following screenshot.



Configuration Manager Metrics Attributes

Each application’s metrics are created under the appropriate folder, and are subdivided by the object types they are associated with. For example, there could be an AHT for applications and an AHT for agent groups in CCAdv. There would then be an AHT business attribute value under Contact Center Advisor/Applications and another one under Contact Center Advisor/Agent Groups. This allows the control over which users have access to specific metrics at a very granular level; a user could be given access to the AHT metric for applications but not for agent groups.

To avoid confusion over similarly named metrics, and because Configuration Server does not allow duplicated names for attribute values, the names of the metrics are name-spaced and case sensitive. The format of the name-space is: [Application].[ObjectType].[Channel].[Name] where:

- [Application]—Can be FrontlineAdvisor, WorkforceAdvisor, or ContactCenterAdvisor.
- [ObjectType]—Represents the object type associated with this metric. This could be AgentGroup, Agent, Contact Group, Application, or Team.
- [Channel]—Can be Email, WebChat, Voice, All or AllNonVoice.
- [Name]—The name of the metric.

For example, the AHT for agent groups in CCAdv would have the following name: ContactCenterAdvisor.AgentGroup.Voice.AHT

An anomaly are the metrics in the folder Contact Center Advisor/Agent Groups. The [Application] component of the names of these metrics is ContactCenterAdvisor. These metrics are displayed in Contact Center Advisor, and some of them are also displayed in Workforce Advisor. WA chooses the subset of them it displays; you cannot control this. Changes you make to these metrics affect CCAdv and might also affect WA.