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# Contact Center Advisor and Workforce Advisor Administrator User's Guide

Key Actions

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# Key Actions

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## Key Actions

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Access to metrics must be configured by an administrator in Genesys Configuration Manager. Data relating to or depending on metrics to which users have no permissions will not be displayed.

Users record the key action taken to resolve the violations when creating a key action report. They might select the key action from the **Key Action** drop-down list or enter a new key action. In addition, users can suggest that the entered key action be added to the drop-down list for future use. The table of key actions is maintained on the **Key Actions** page in the Administration module. The following screenshot shows the **Key Actions** page.

**Key Actions**

Search [ ] [ ] New

Name	Author	Metric	Metric Type	Approved	Display Order
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Row 1 to 0 of 0

**Create / Edit**

\* Key Action [ ]

Metric [Select] [v]

Display Order [ ]

Approved ☒

Save Reset

### Key Actions Page

## Key Action Details

The details of a key action include:

- **Name:** The name of the key action. The name must be unique and is not case sensitive. If the name is

modified, it will change on existing key action reports.

- **Author:** Properties that identify the person who created the key action on the **Key Actions** page or on a key action report. These are the person's first and last name, or e-mail address, or username, depending on what is available in the Configuration Server. The author is display only.
- **Metric** (optional): The metric to which the key action applies. A key action associated to a metric is available on the **Action Management** page only if the metric matches one of the alerts for the key action report. Key actions without a defined metric are available on the **Action Management** page for all alerts.  
The metric cannot be changed if it is included in a key action report but it can always be removed. Only the metrics that can have a threshold rule display in the drop-down list. The drop-down list shows the display names of the metrics within a metric type.  
If the key action is suggested from the **Action Management** page, the metric defaults to unselected.
- **Display Order:** The location of the key action in the **Key Actions** drop-down list on the **Action Management** page. Key actions without a sequence number display in alphabetical order. The range of the display order is 30.
- **Approved:** The status of the key action is either approved or unapproved. When added from the **Key Actions** page, the **Approved** check box is automatically selected. When suggested from the **Action Management** page, the **Approved** check box is unselected (unapproved).

From the **Key Actions** page, you can:

- Add a new key action to be available in the **Key Action** drop-down list on the **Action Management** page.
- Approve key actions.
- Edit a key action.
- Delete one or more key actions that are not used and not included in a key action report.

### Tip

**NEW** The number of archived key action reports/alert combinations will grow over time. Historical data might affect performance. To remove key action reports/alert combinations, see [Purge Key Action Reports and Historical Alerts](#) in the *Genesys Performance Management Advisors Deployment Guide*.

## Approve or Reject a Key Action

### Procedure:

**Purpose:** On the **Action Management** page, users can enter new key actions and suggest that they are added to the drop-down list. The suggested key actions display in the **Key**

**Actions** table on the **Key Actions** page. The key actions suggested by a user are initially unapproved.

### Steps

1. To add an unapproved key action to the drop-down list on the **Action Management** page:
  - a. Highlight a row for an unapproved key action in the **Key Actions** table.  
The details display in the details section.
  - b. Select the **Approved** check box.
  - c. Click **Save**.  
The approved key action displays in the table with a check mark.
2. To leave a key action off the list on the **Action Management** page:
  - a. Highlight a row for an approved key action in the **Key Actions** table.  
The details display in the details section.
  - b. Clear the **Approved** check box.
  - c. Click **Save**.  
The unapproved key action displays in the table with the symbol.