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Frontline Advisor Manager Help

Pulse Advisors 9.0.0

1/13/2022

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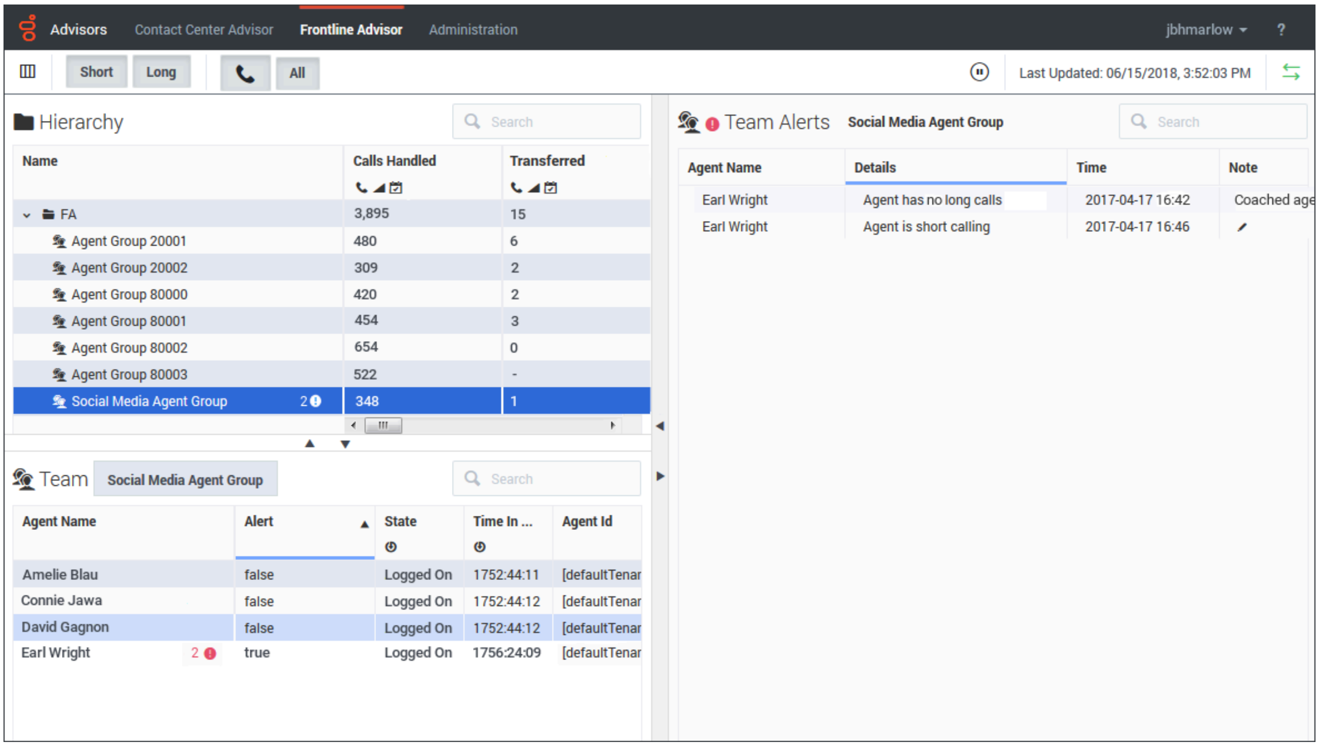
Genesys Frontline Advisor Help

The Frontline Advisor dashboard gives you a real-time view of agent activity. You can configure alerts in Frontline Advisor to draw immediate attention to agents who need coaching so you can more effectively manage results and performance-related activity.



Are you new to Frontline Advisor? Get started.

Looking for answers to specific questions? Try these topics:

- Navigating Advisors Modules
- Get to Know the Frontline Advisor Dashboard
- Understanding Alerts
- How do I locate information about a specific agent team?
- Can I add metrics to my dashboard display or remove metrics?
- Which keyboard shortcuts can I use with the accessible dashboard?

Viewing the Frontline Advisor Dashboard Using a Mobile Device

Starting with Advisors release 9.0, you can view your Frontline Advisor hierarchy on your mobile device. The Advisors mobile view is designed to be an express service that lets you easily view the **Hierarchy** pane on any mobile device that has a supported browser. For additional information about the mobile view, see Frontline Advisor Mobile View Dashboard.

Accessibility

If you have visual impairment, you can work with Frontline Advisor using an accessibility interface. Frontline Advisor supports JAWS Standard software, an accessibility interface that provides a series of keyboard shortcuts for navigating the tabulated information on the screen. The screen contents are translated into voice in the local language. Additional language options are dependent on the version of Advisors used in your enterprise.

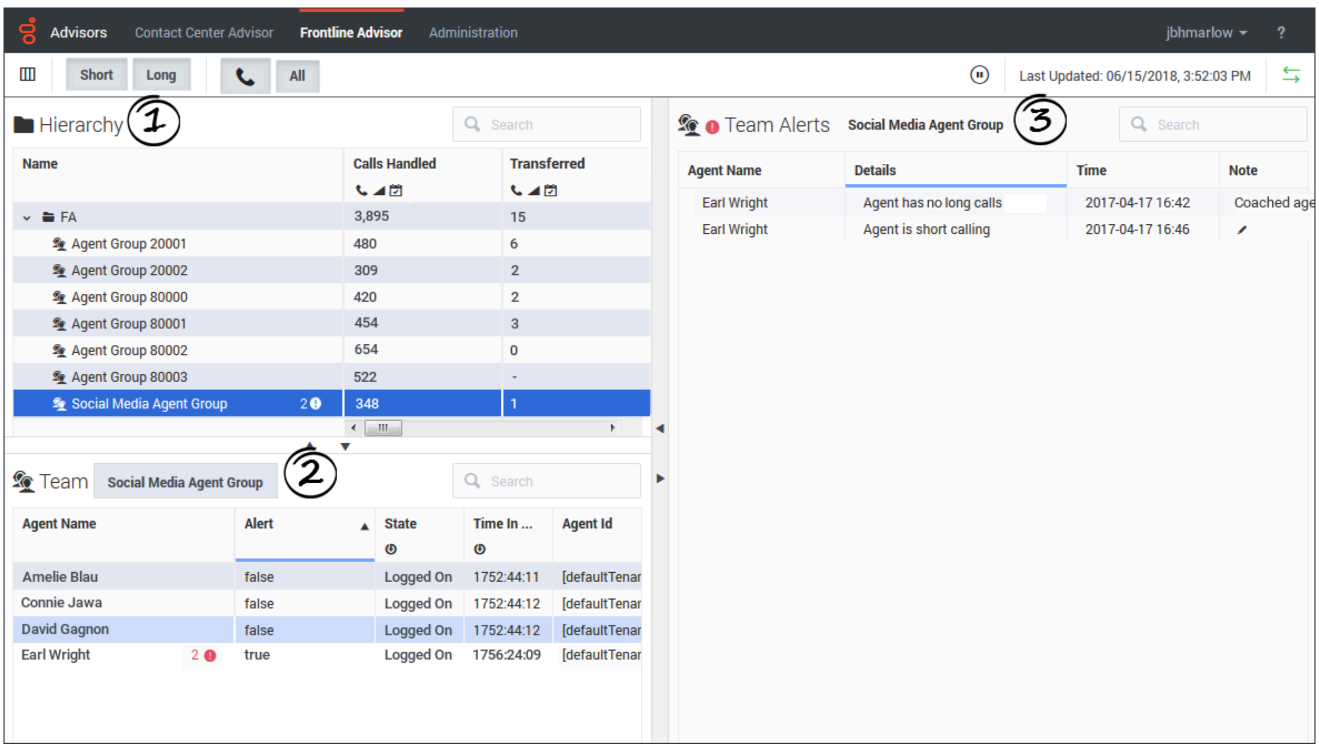
Getting Started

You can customize your Frontline Advisor dashboard to show the status, performance, behavioral- or activity-based data that matters most to you. Depending on your role, either you or a system administrator will configure business rules that monitor key performance indicators. You will then receive notifications of situations that require immediate attention.

Having access to real-time data and alerts means that you can continuously work with agents to correct problems and reinforce progress as it happens, rather than waiting for the next break, the next shift, or the end-of-week performance summary.

This Getting Started page will get you logged in with the correct language preferences, and familiarize you with the basic dashboard layout and general navigation features. Let’s get started.

Get to Know the Frontline Advisor Dashboard



The Frontline Advisor dashboard has three panes:

1. Hierarchy pane	The **Hierarchy** pane is a top-level, summary-type view of groups and agent teams that you monitor.
2. Team pane	The **Team** pane provides detailed information about the agent team that you

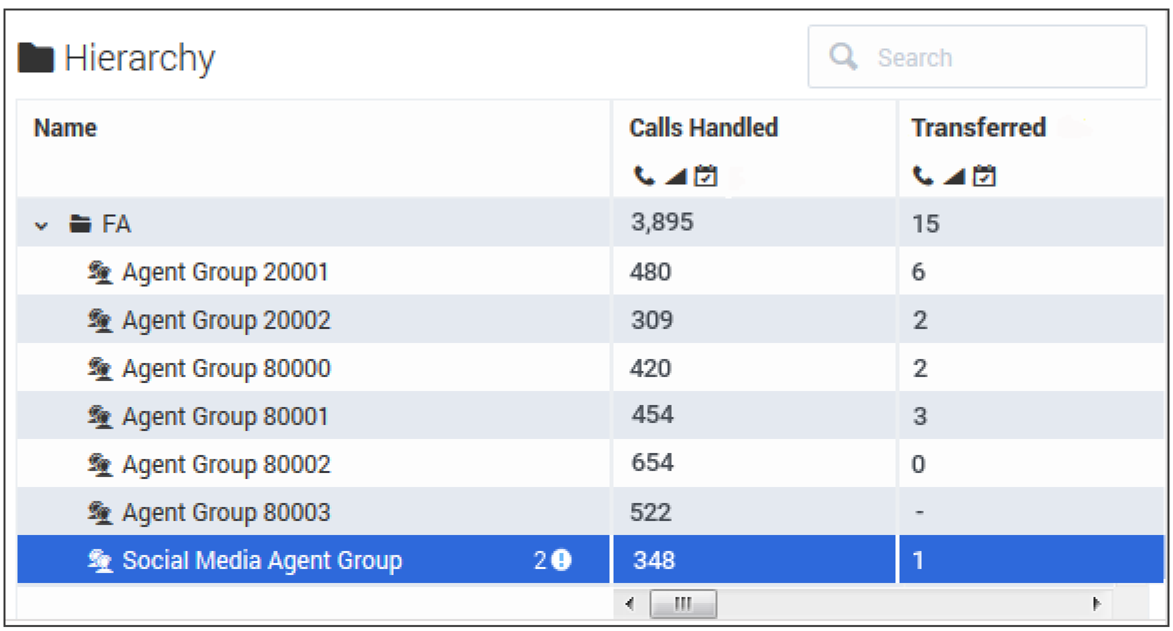
	selected in the **Hierarchy** pane.
3. Team Alerts pane	The **Team Alerts** pane provides information about all of the rule-related alerts that are currently active on the agent team that is selected in the **Hierarchy** pane.

All panes provide information in a table format (that is, rows and columns). The column headings use *metric* names. You might use the term *statistic* or *Key Performance Indicator* (KPI) in your Contact Center, rather than "metric", but you are no doubt familiar with performance-tracking data and the importance it plays in maintaining an efficient and effective contact center. Each metric measures and tracks a specific aspect of agent and/or group performance. The performance metrics are tied to larger business goals and targets. Metrics data that is collected at the level of individual agents is aggregated to become metrics data for teams, and so on for the entire enterprise. The management team uses this collection of metrics data to assess the enterprise's successes and failures and to determine where it stands in terms of specific short- and long-term goals.

The following sections describe each pane:

- Hierarchy Pane
- Team Pane
- Team Alerts Pane

Hierarchy Pane

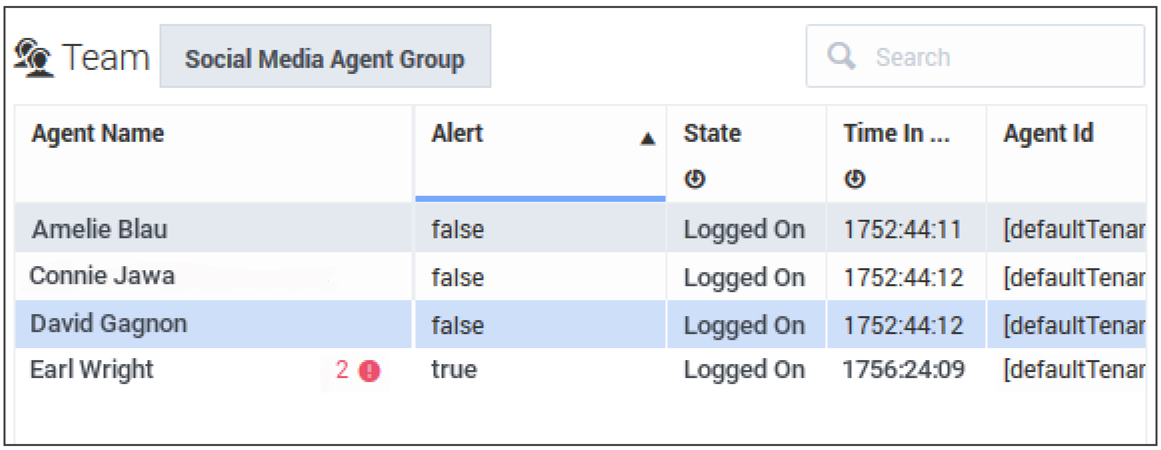


The *monitoring hierarchy* pane in your Frontline Advisor dashboard provides a summary of activity associated with the agent teams that you manage. The monitoring hierarchy is a representation of your enterprise; more specifically, it is a representation of the people in your enterprise who handle customer interactions.

You cannot modify the structure of the hierarchy from within the Frontline Advisor dashboard. The organization of the hierarchy, as well as any security permissions that control which parts of the hierarchy you can view, are managed separately.

It is called a hierarchy because it displays groups of people in a top-down view. As you work your way down through the hierarchy, you see a more granular group level until you are at the level of agent teams. For example, at the top level of the hierarchy you might see department names—*Sales*, or *Customer Care*. This top-level group typically contains other groups, although that is not a requirement. Let's assume that there are additional groups within each department. For example, there might be two groups within the *Sales* group—*SmartPhones* and *Tablets*. Within each of those groups are the teams of agents that deal with each specific product. For example, the agent teams that comprise *SmartPhones* might be *Brand A*, *Brand B*, and *Brand C*.

Team Pane



The **Team** pane is where you focus on each agent's overall status in real time. The **Team** pane displays data only when you select a team in the **Hierarchy** pane.

The data includes the names of the agents who are part of the selected team, and indicates the agents who are generating alerts, as well as the types of alerts that are currently active.

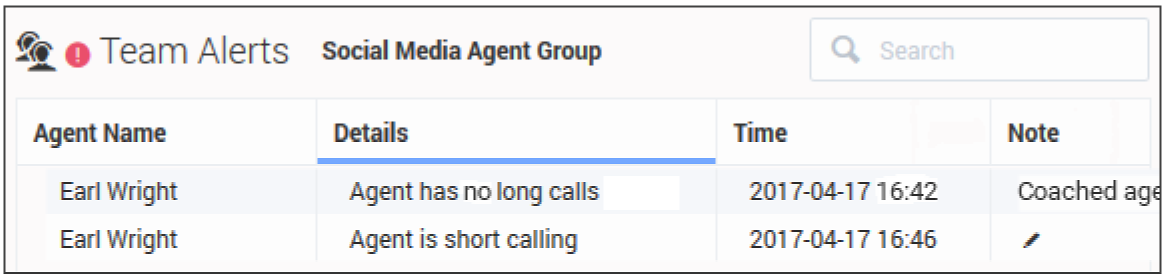
If the **Agent Name** column is available on your **Team** pane, then you will see the agents listed either by full name, by email address, or by user name. Your management team decides how users will be identified in the dashboards. By default, agents who are logged in to the system appear first in the **Team** pane, sorted alphabetically by last name (if agents' full names are used). Agents who are currently logged off are at the bottom of the list.

It is possible to change the order in which data displays in the pane. Click a column heading to sort the data based on that column, in ascending or descending order. For example, if your dashboard displays agents' full names, and you have access to the **Agent Name** column, then you can click the **Agent Name** heading to sort the list of agents alphabetically by last name. For more information, see Can I change the order in which data displays in the panes?

Using default settings, Frontline Advisor refreshes information in the **Team** pane every 10 seconds for *state*-related data (for example, Not Ready) and every 10 minutes for *performance*-related data (for example, Calls Handled). The refresh rate is configurable; you might have sufficient security permissions to specify dashboard refresh rates, or that configuration might be performed by system administrators.

Every agent's call statistics continue to accumulate until the relevant time period ends even though one or more agents might log off during the time period. Threshold violations are cleared as soon as the agent logs off.

Team Alerts Pane



Information about a team’s rule violations displays in the **Team Alerts** pane. You see data in this pane only when there is at least one rule violation for the team that you have selected in the **Hierarchy** pane.

You can find the following information about rule-related alerts in this pane:

- the identity of agents who are generating the rule-related alerts
- a description of the specific rule violation, if that information has been configured for your dashboard
- the time at which the alert was generated

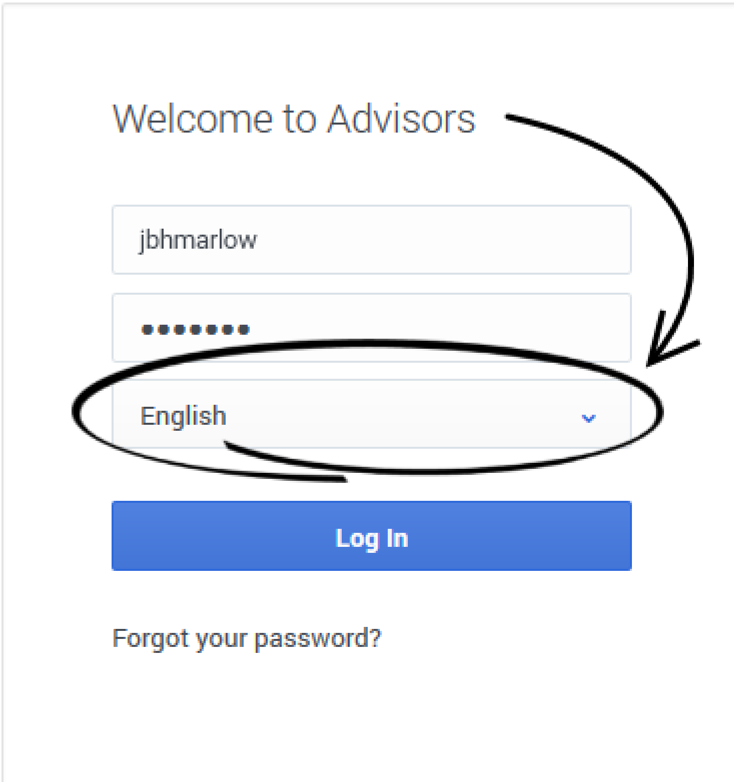
By default, data in the **Team Alerts** pane is listed by alert time (the most recent alert is first in the list). However, if you select an agent in the **Team** pane, then any alerts associated with that agent move to the top of the list in the **Team Alerts** pane. You can also click column headings in the **Team Alerts** pane to change the order in which data displays. For example, if your dashboard displays agents' full names, then you can click the **Agent Name** column heading to sort the list of agents alphabetically by last name, in ascending or descending order. For more information, see Can I change the order in which data displays in the panes?

Click the pencil icon () beside an alert to add a note. For example, you might describe how you handled that particular violation. Once you save the note, it displays in the row with the violation. You cannot edit or delete the note after it is saved. The note becomes part of the recorded history of the agent.

Only alerts associated with business rules display in the **Team Alerts** pane. If agents are generating only threshold-related alerts, then the **Team Alerts** pane will be empty.

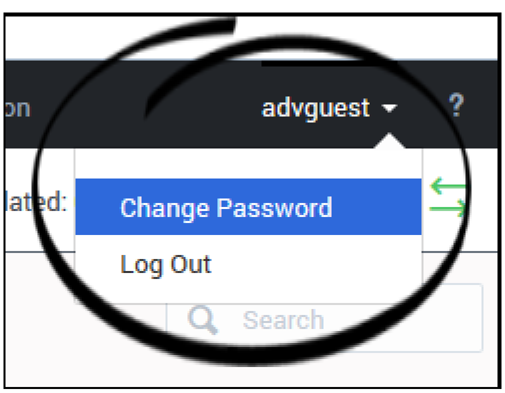
For more information, see Understanding Alerts.

Select Language Settings for Your Dashboard



You specify your language preference on the Advisors login screen. The Advisors modules display text in the language you select on this screen. The list of available languages is dependent on the release of Pulse Advisors that is used in your Contact Center.

Change Personal Settings or Log Out



When you are logged into Frontline Advisor, you can use the drop-down list that is available under your username in the dashboard's toolbar to change personal settings, if applicable, or to log out of the Advisors modules. The options available to you in the drop-down list are dependent on the security permissions assigned to your role. For example, if you do not have permission to change your login password, then the **Change Password** option is not available in your drop-down list.

Role-based Access

Every person in a Contact Center who has at least some interaction with customers will be assigned to a *role*. For example, *agent* and *supervisor* are roles. Those roles control access to many elements of software, including the following:

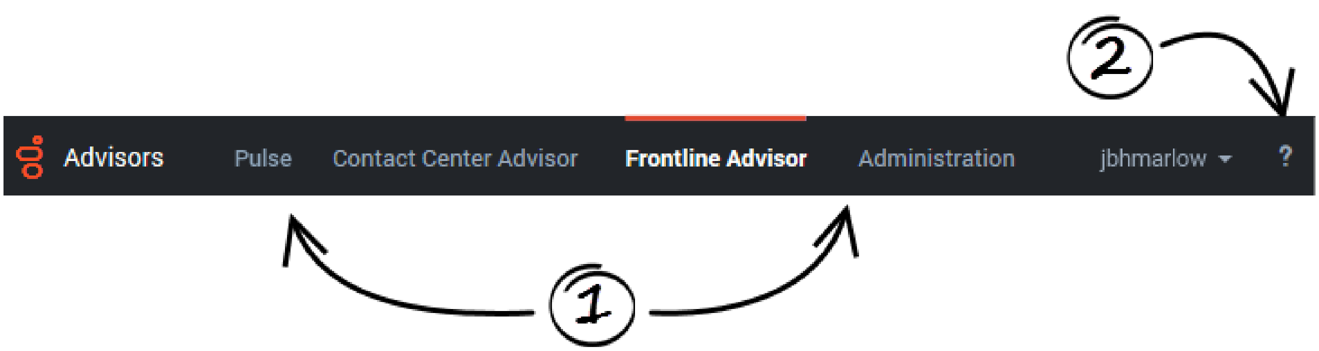
- Advisors modules
- Various parts of the Advisors dashboards; for example, the dashboard panes and the metrics and alerts that display in those panes
- *Nodes* (groups) in the Hierarchy pane

Because of these role assignments, your dashboard might look a little different than the sample dashboards shown in this Help, and you might not have access to everything that is described in this document.

Navigating Advisors Applications

Depending on your role in the Contact Center, you might have access to only Frontline Advisor, or you might have access to additional Advisors dashboards. Use the Advisors navigation bar to open your Frontline Advisor dashboard.

Many of the Frontline Advisor dashboard settings are saved and stored immediately, as you make changes. For example, let's say that you increased the width of the **Team Alerts** pane, and then accidentally closed the browser (without logging out). When you open the browser and the Frontline Advisor dashboard again, the **Team Alerts** pane will have retained the width that you set before accidentally closing the browser.



1. Available Applications	On the navigation bar, you see links to the Advisors applications that you use. If you typically use Genesys Pulse, as well as Advisors applications, then your system administrator might also include a quick link to the Pulse application in the Advisors navigation bar. A line over an application name indicates the active dashboard. Click an application name on the navigation bar to open the associated dashboard. You can open two or more Advisors dashboard sessions simultaneously, however Genesys recommends that you use one type of web browser when working with Advisors. See also Is it okay to open multiple Frontline Advisor dashboard sessions?
2. Help Topics (quick access to this document)	To open this document from the Advisors dashboards, click the question mark that displays in the top-right corner of the navigation bar. If you are not logged in to the Advisors dashboards, you can also access this document on the Genesys documentation site.

Understanding Alerts

Frontline Advisor provides a lot of information about the performance of your agent teams. It is important to learn to read the various alerts that can appear in your dashboard; they are the key to understanding where you need to provide guidance.

If you see only numbers with a white background in your dashboard, and no exclamation marks display anywhere in the **Hierarchy** and **Team** panes, then congratulations! Things are going well and agents are performing as expected.

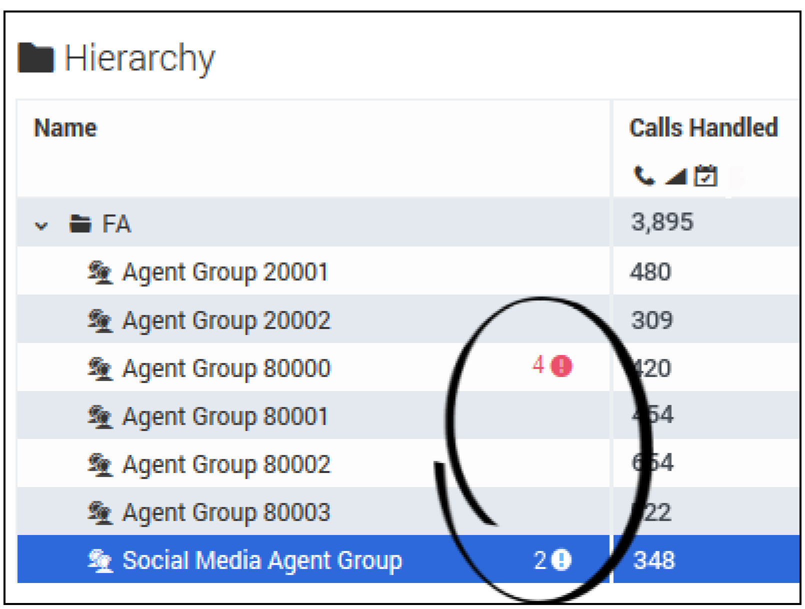
If you see exclamation marks and red or yellow backgrounds associated with numbers, then you are experiencing alerts that should be monitored closely.

There are two types of alerts:

- Rule-related alerts
- Threshold-related alerts

You might be responsible for configuring the rules and thresholds for your teams, or a system administrator might do it for you.

Rule-related alerts



Rule-related alerts display within the list of group names in the **Hierarchy** pane and within the list of agent names in the **Team** pane, rather than in the table cells.

Rules are conditions that continuously monitor agent performance (rules evaluate and trigger on agent performance, not on team performance).

A rule can be based on the frequency of calls held or calls transferred, or on the frequency of long or short call duration or wrap time. For example, the following rule tracks *short calling*:

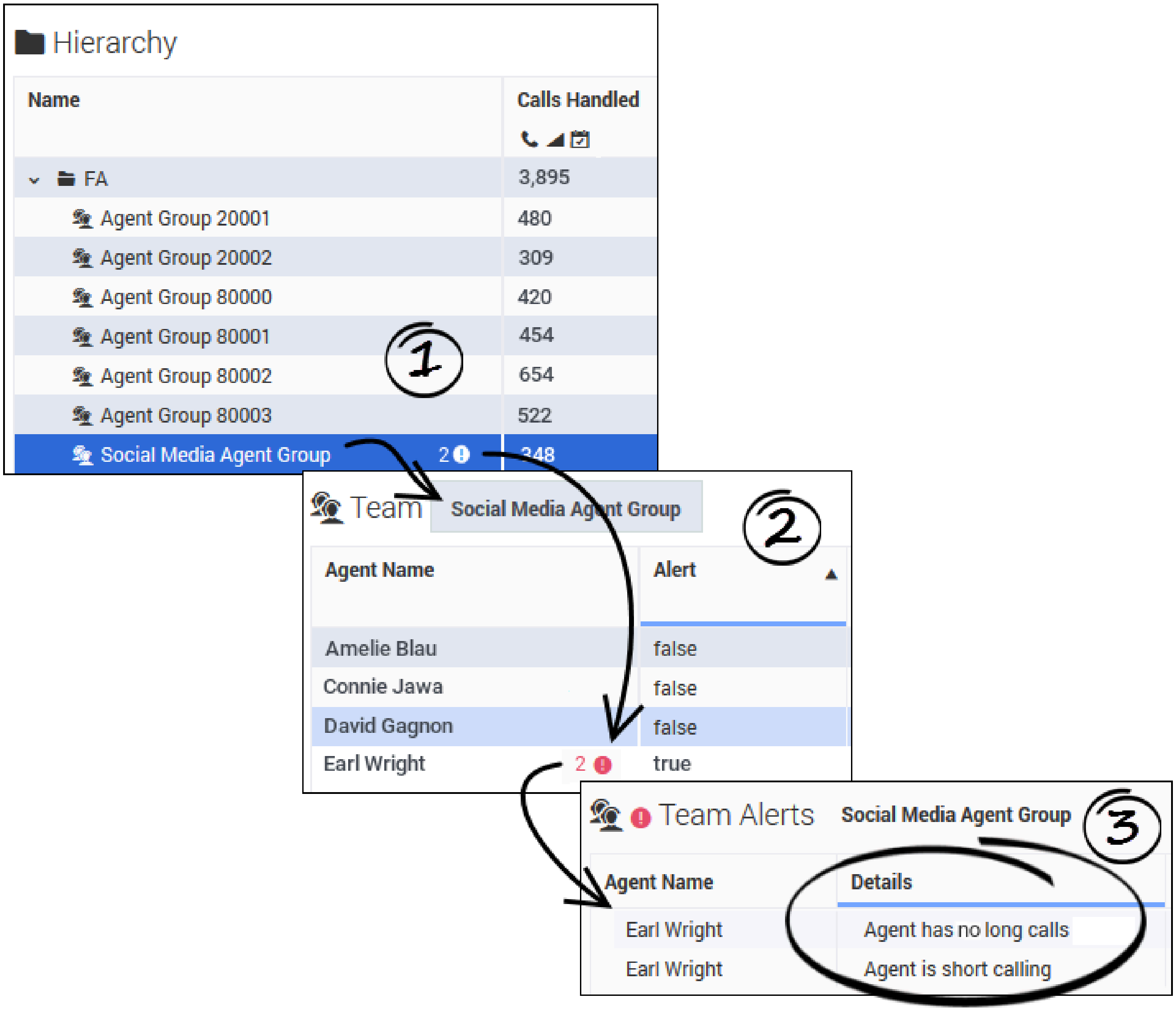
```
Set of agents has > 50 Calls Handled which are < 20 seconds in the last 20 minutes.
Description: Agent is short calling.
```

Once a rule violation occurs, an alert is generated. The rule-related alert icon is always red. It is good practice to act on this type of alert quickly – *before* agents develop bad habits.

The frequency of an alert is an indicator of desirable or undesirable trends. Ideally, the number of rule alerts should be low: one or two per agent per day. If your role includes the permission to configure rules, then use rules to improve the performance of your teams. Genesys recommends that you set rules to monitor only one or two scenarios each week. Stay focused on the performance areas that require the most improvement. In future weeks, you can update the rules to tighten the triggering numbers or, once agents are performing well in those areas, you can define new rules to monitor completely different aspects of performance. Using rules in this way, you gradually improve the overall performance of teams.

An alert becomes inactive, and is archived in a database (that is, it is removed from the dashboard), once the agent keeps his or her behavior corrected for the time period defined in the rule (for example, 20 minutes). Any alert that becomes inactive while Frontline Advisor is offline (for example, during maintenance cycles) will be archived at system startup.

Trace rule alerts to specific agents



In the **Hierarchy** pane, you might see rule alert summaries for groups or teams, such as those pictured in the figure. The number beside the exclamation mark indicates how many rule violations are currently active for the group or agent team.

In the **Hierarchy** pane, if you select an agent team that is triggering rule alerts (#1 in the figure), then you will see which specific agents are triggering alerts (and how many alerts are associated with each agent) in the **Team** pane (#2 in the figure), as well as details about the alerts in the **Team Alerts** pane (#3 in the figure).

Threshold-related alerts

Thresholds define the critical, warning, and acceptable conditions for each metric for one or all time profiles. You, or another administrator or supervisor in your contact center, can specify an acceptable value or range of values for each metric. When an agent consistently fails to stay within that range of values, this type of alert is triggered.

The color of an alert is meaningful:

- The yellow-colored alert is a warning that the agent's activity, tracked by the metric that is displaying the alert, does not quite meet expectations.
- The red-colored alert is a critical alert. You should try to correct the activity associated with this alert as soon as possible.

Threshold Settings

Threshold definitions are based on metrics. A threshold setting can be:

- Based on a count
- Based on an average or maximum time value
- Based on the duration of an agent's state

Threshold definitions typically have both upper and lower limits. For example, the following threshold configuration tracks the acceptable number of calls handled in a specific time interval:

```
Time Profile: 10 minutes
Calls Handled:
```

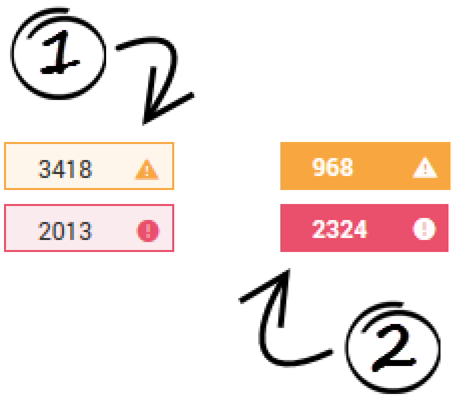
- `In the specified time profile, handling 3 to 4 calls generates a warning alert.`
- `In the specified time profile, handling 8 to 10 calls generates a warning alert.`
- `In the specified time profile, handling less than 3 or more than 10 calls generates a critical alert.`
- `In the specified time profile, handling 5, 6, or 7 calls is acceptable.`

Threshold violations are cleared as soon as the agent logs off.

Warning and Critical Threshold Alerts

If you see numbers with a yellow background or outline, then you need to watch those numbers closely and see how they trend. This type of alert is a warning, and it lets you know that an agent's performance is slipping. You might coach the agent at this point, or you might wait and see if the performance improves.

If you see numbers with a red background or outline, then you need to pay close attention – this is a critical alert. It could be a short-lived event, or it might be an indication that some aspect of the agent's performance (identified by the metric with which the alert is associated) has become unacceptable. It is important to coach the agent as soon as possible.



Threshold alerts display as either an outlined table cell (1) or as a solid-colored table cell (2):

1. An outlined table cell indicates that there is at least one threshold violation for at least one agent (or object) within the associated aggregation group. (Frontline Advisor does not capture team performance metrics; rather, it indicates team performance by aggregating the metric values of the member agents.) If you see an outlined table cell in the **Hierarchy** pane, you need to drill down to the agent level, if possible, to find the actual violation.
2. A solid-colored table cell indicates that the associated agent (or object) has violated the threshold settings and triggered the alert.

The color of the alert that displays in the **Hierarchy** pane is dependent on the color of the alert in the **Team** pane:

- The threshold violation colors in the **Team** pane determine the threshold violation colors in the **Hierarchy** pane. For example, if all of the threshold violations for a metric in the **Team** pane are yellow, then the threshold violation color for the metric for the affected group in the **Hierarchy** pane is also yellow.
- If only one threshold violation for a metric in the **Team** pane is red, and any other threshold violations for the metric are yellow, then the violation color for the metric for the affected group in the **Hierarchy** pane is red. In other words, the highest severity violation determines the color of the alert in the **Hierarchy** pane.

A red violation in the **Hierarchy** pane might appear misleading when the values are generally in the yellow range of the threshold rule, but the color is displayed to call attention to the violations on the team. If you see the red threshold alert at the group level, it does not indicate that the violation was triggered at that level, but means that you should do root cause analysis by drilling down to the team level to find the actual violation.

FAQs Related to Dashboard Use

There are many ways in which you can customize your Frontline Advisor dashboard to optimize views, analyze data, or focus on key metrics. This page describes how to use the Frontline Advisor dashboard for these everyday tasks.

Working with metrics

The following topics provide information to get you started working with metrics in the Frontline Advisor dashboard:

- How do I view metrics specific to a time profile group or type of interaction?
- Can I add metrics to my dashboard display or remove metrics?
- Where can I find information about a metric?
- Can I change the order in which metrics display in the dashboard?
- Why do some metrics display a value of N/A?

Working with dashboard tools

The following topics provide information about features that help you to find, display, and better analyze specific data in the dashboard panes:

- Can I change the order in which data displays in the panes?
- How does Search work in the Team pane?
- How do I locate information about a specific agent team?
- Is it okay to open multiple Frontline Advisor dashboard sessions?
- When did my dashboard last update the information and can I stop the updates?
- Can I adjust the size of the panes in my dashboard?
- Can I adjust column width?

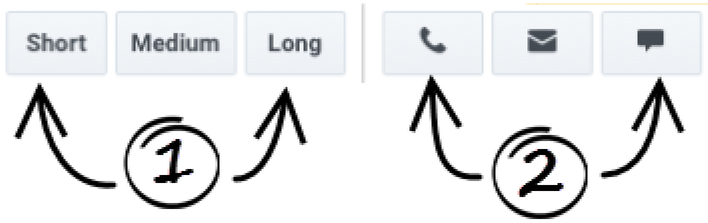
Working with the accessible dashboard

The following topic provides a list of keyboard shortcuts that you can use with the accessible dashboard:

- Which keyboard shortcuts can I use with the accessible dashboard?

How do I view metrics specific to a time profile group or type of

interaction?



You can filter the dashboard display by time profile group and/or by channel (voice, email, or chat interactions). The filters are available in the toolbar at the top of your dashboard. Depending on your role, and on the time profile groups and channels used in your Contact Center, you might not see all of the filters shown in the Figure.

The **Time Profile Group** and **Channel** buttons are on/off toggles. You can choose to display metrics for any combination of available time profile groups and channels in your dashboard.

1. Time Profile Group
   Configured *time profile groups* are available as clickable buttons. Use these buttons to filter the information in the dashboard by time profile group (Short, Medium, and Long). The following values are the default values for the time profile groups:
   - 5 minutes/Sliding for a Short group
   - 30 minutes/Growing for a Medium group
   - 24 hours/Growing for a Long group

   You might have access to the Frontline Advisor administration interface, in which you can customize the time profile group values, or a system administrator might customize those values for you.
2. Channels
   Available *channels* display as clickable buttons. *Channels* are the methods that agents use to communicate with customers (for example, telephone (also referred to as *voice*), email, and chat). Use these buttons to filter information in the dashboard by channel. For example, if you want to see metrics related only to email interactions, then click the **Email** channel button.

Can I add metrics to my dashboard display or remove metrics?

If you see the **Column Chooser** button ( ) in the Frontline Advisor toolbar, then you can choose which metrics to display in your dashboard, and which to hide. For example, your selection of dashboard metrics might be based on the particular aspects of team and agent performance that are most relevant in order to meet specific operational targets. Access to the **Column Chooser** is tied to user roles. In some enterprises, a manager or system administrator will select the metrics for you, in which case you will not have the **Column Chooser** button.

If you have the **Column Chooser** button ( ) in the toolbar, click it to open the **Column Chooser** window. In this window, you make choices about which metrics to display in your dashboard. Genesys recommends that you minimize the number of metrics that you actively watch in your dashboard; show only a few key metrics at a time. Too many metrics means too much information to process. Focus on specific goals for your teams and track metrics that are specific to those goals.

In the **Column Chooser** window, use the **Select** drop−down list to choose which set of metrics to display in the **Selected Metrics** pane. Metrics in the **Selected Metrics** pane display in your dashboard. You can add metrics to, or remove metrics from, this initial list.

Any metric in the **Available Metrics** pane is available for display, but is not currently displayed in the dashboard. To add an available metric to your dashboard display, place a check mark beside the metric in the **Available Metrics** pane. When you click **Apply**, that metric will be moved to the **Selected Metrics** list and will be added to your dashboard display.

To help you narrow your search for a specific metric in the **Available Metrics** pane, use the filters at the top of the pane, or enter some or all of the metric name in the **Search** field.

To remove a metric from your dashboard, you simply remove the check mark from that metric row in the **Selected Metrics** pane. When you click **Apply**, that metric will be moved to the **Available Metrics** pane and removed from your dashboard.

Where can I find information about a metric?

Metric descriptions are contained in tooltips in your dashboard. To display tooltips, hover your cursor over any metric column heading. The tooltip contains the metric display name, the channel, the time profile group, and a description of the metric. Genesys also provides a *Pulse Advisors Metrics Reference Guide*.

Can I change the order in which metrics display in the dashboard?

As you work with the Frontline Advisor dashboard, you might find that some metrics are more helpful than others. If you continually scroll back and forth in the **Hierarchy** or **Team** pane to find certain specific metrics, then consider moving those metrics into view in the dashboard panes. You can change the order in which the metrics display by dragging a column heading to another location. The only exception is the **Agent Name** column. If you have this column in your **Team** pane, you cannot move it.

Why do some metrics display a value of N/A?

You might see "N/A" or dashes displayed for some metrics in your dashboard, rather than numeric values. N/A indicates one of the following:

- data is temporarily unavailable for that metric
- the number of logged-in agents is less than the "minimum agent count" set for the team, which is a global system setting that is not specific to Advisors modules

A dash (-) means that the data is never available for that metric for the group or agent. This does not necessarily indicate a problem; it could be related to data source limitations.

Which keyboard shortcuts can I use with the accessible dashboard?

Keyboard shortcuts can be used in conjunction with screen reader accessibility software, as an alternative to the standard browser navigation. Frontline Advisor supports JAWS Standard software. You can use the following keyboard shortcuts in the Frontline Advisor accessible dashboard.

Shortcut	Accessibility Function
T	Jumps to the Frontline Advisor **Hierarchy** pane table.
CTRL + ALT + NumPad5	Reads the row and column coordinates, followed by the cell contents, then the appropriate row and column headings.
CTRL + ALT + Right Arrow	Moves one cell to the right in the same row.
CTRL + ALT + Left Arrow	Moves one cell to the left in the same row.
CTRL + ALT + Up Arrow	Moves one cell up in the same column.
CTRL + ALT + Down Arrow	Moves one cell down in the same column.
CTRL + ALT + Home Arrow	Moves to the first cell in the current table.
CTRL + ALT + End Arrow	Moves to the last cell in the current table.
B	Exit (close) the accessibility interface.

Can I change the order in which data displays in the panes?

The ability to sort information in the dashboard panes is controlled by user roles; you can sort information within the panes only if your role includes the privilege to do so. Assuming your role includes this privilege, you can sort the data in any column of the **Team** and **Team Alerts** panes by clicking the column heading. For example, sorting the **Average Wrap Time** column gives you a quick view of the agents with the longest or shortest average wrap times. A blue line displays below a column heading to indicate that you have sorted the data in that pane based on that column.

The **Hierarchy** pane must retain its tree structure (groups within groups), so sorting is not available in this pane.

The order in which data is sorted is retained even if you log out. When you next log in, data in the columns is sorted based on the order that you last selected in your previous session.

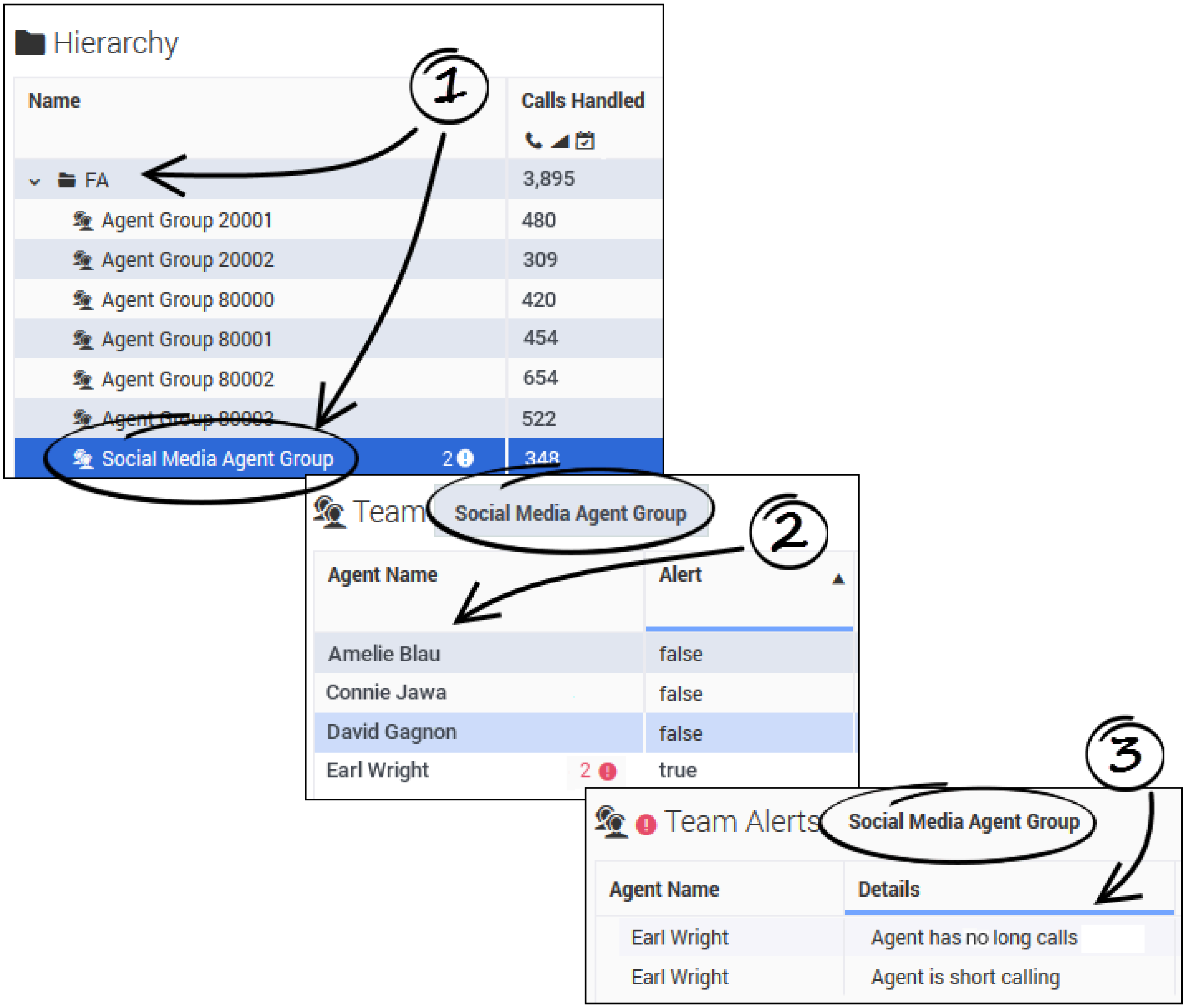
If your role does not allow you to sort data, or if you have never changed the order in which data is sorted in columns, then the default sorting is used. See Team Pane and Team Alerts Pane for more information about the default data sorting in each pane.

See also Can I change the order in which metrics display in the dashboard?

How does Search work in the **Team** pane?

You can use the **Search** field above the **Team** pane to filter the information that is displayed in the pane. For example, assume you added the **Agent Skills** metric column to your **Team** pane. You can enter a skill name in the **Search** field at the top of the **Team** pane; enter the full skill name or only part of the name. The **Team** pane will display only agents whose skills include the search string that you entered.

How do I locate information about a specific agent team?



To monitor a specific team of agents, navigate the **Hierarchy** pane until you find the agent team (1). Agent teams are marked with an agent team icon (). Once you select an agent team in the **Hierarchy** pane, the **Team** pane displays the list of agents who are members of that team, as well as the activity of individual agents (2). If there is at least one agent on the selected agent team whose activity is generating a rule-related alert, then details of each alert display in the **Team Alerts** pane, including the names of the agents who are triggering the alerts and which rules are affected (3).

Important

If the number of agents who are logged in is less than the minimum agent count specified for the team, then performance metrics are displayed as N/A in the **Hierarchy** pane. The **Team** pane displays the values as normal.

You can also search for a team (or other group) by entering a name in the **Search** field above the **Hierarchy** pane. The **Search** function acts like a filter for the dashboard; the **Hierarchy** pane is cleared of all *nodes* (that is, groups) except those that match the search criteria. The search is limited to the hierarchy nodes that are listed in your **Hierarchy** pane and will not return results for group or team names that you do not normally see in your monitoring hierarchy.

For a description of the Frontline Advisor dashboard panes, see Get to Know the Frontline Advisor Dashboard.

See also How do I view metrics specific to a time profile group or type of interaction?

Is it okay to open multiple Frontline Advisor dashboard sessions?

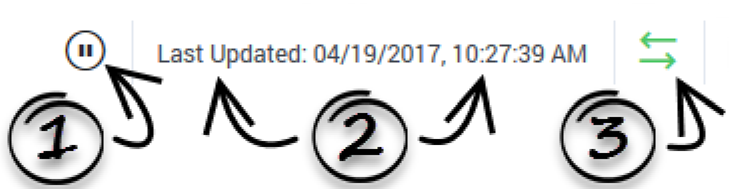
You can open the Pulse Advisors modules in Microsoft Internet Explorer, Google Chrome, or Mozilla Firefox. It is okay to open multiple sessions of Advisors simultaneously. For example, you might want to have two Frontline Advisor sessions running simultaneously, or you might open the Administration module in one browser window and the Frontline Advisor dashboard in another window.

The Advisors dashboards work like any other browser window; you can right-click an Advisors module name in the navigation bar and choose to open that module in a new tab or window.

Tip

Genesys recommends that you use one type of web browser when working with Advisors applications.

When did my dashboard last update the information and can I stop the updates?



The Frontline Advisor dashboard receives updated information automatically, based on a configured time interval. You might be responsible for configuring that time interval, or someone on the system administration team in your enterprise might configure it for you.

1. Pause the Dashboard

You can pause the dashboard if you want to temporarily halt the automatic data updates. For example, you might want to analyze data in detail, or discuss some aspect of the information currently in your dashboard with a colleague. The Data Connection status indicator (3) changes to yellow status () when you pause the dashboard; this is normal behavior. To resume the dynamic data display, click the **Play** button . The Data Connection status indicator changes to green (), and the real-time updates resume.

2. Timestamp

Under normal circumstances, the Frontline Advisor dashboard receives data at regular intervals. However, if there is no new data to display, the timestamp at the top of your dashboard does not change. Check the timestamp to determine when updated data was last received. If the timestamp fails to update in a very long time, you should talk to your system administrator. He or she will check to make sure that the source of the data is functioning correctly.

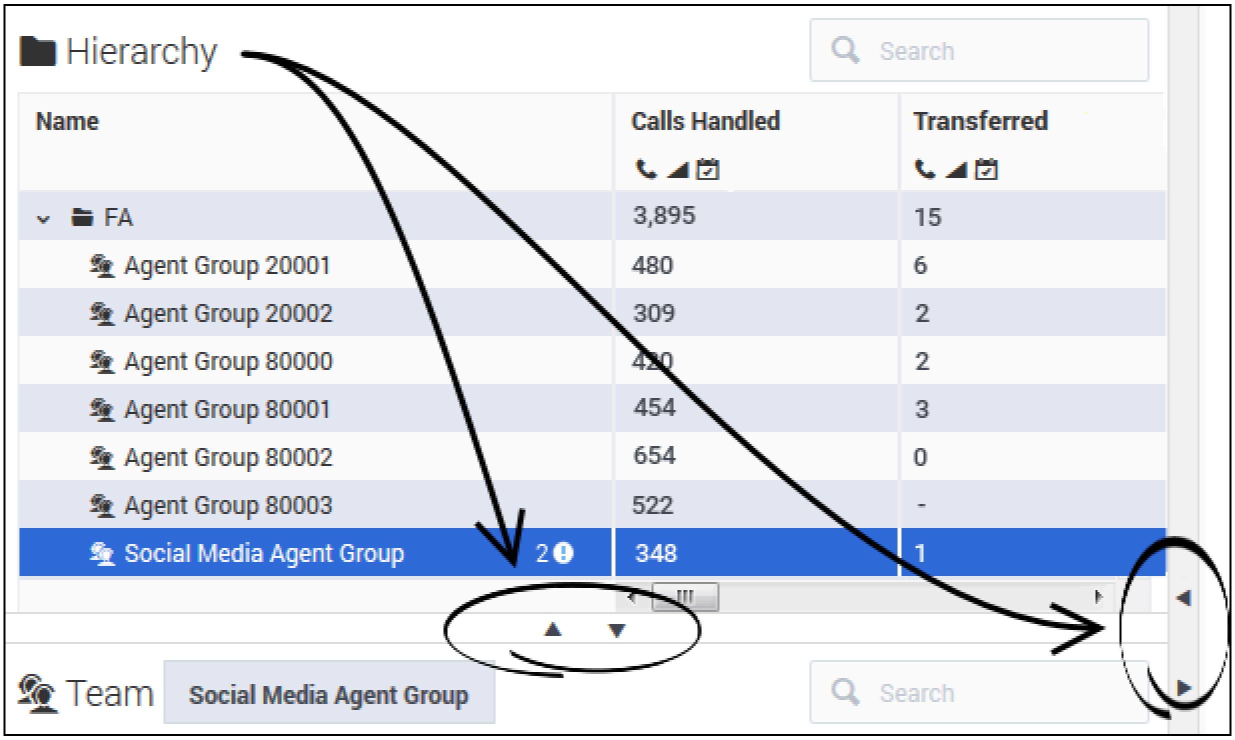
3. Data Connection status indicator

The status indicator changes color when you click the **Pause** button, or when there is a problem with connectivity. The indicator can be green, yellow, or red. It will turn yellow, for example, if you pause the dashboard. If the indicator is red (), report it to your system administrator. Red indicates that Frontline Advisor is no longer receiving data.

Can I adjust the size of the panes in my dashboard?

You can manually resize the height and width of each pane in your dashboard. Move your cursor over the space between two panes until you see the split bar symbol (), and then click and drag.

To quickly hide a pane in order to enlarge another, use the collapse/expand arrows that are available between panes.



Can I adjust column width?

You can adjust the width of individual columns in your dashboard panes by dragging the cursor when it changes to a split bar (←‖→) near a column break. There is a default minimum width for columns; once you reach the minimum width, then you can only enlarge the column.

If you add one or more columns to your dashboard using the Column Chooser, the width of the columns adjusts automatically.

Frontline Advisor Mobile View Dashboard

NEW You can check the Pulse Advisors dashboards on your mobile device using a supported browser. This page gives you an overview of the Frontline Advisor application for mobile devices.

You can view the full Advisors desktop dashboard on your mobile device, if necessary, but the dashboards are available as an optimized view that is intended specifically for mobile device users. The Frontline Advisor mobile view gives you access to the desktop dashboard's **Hierarchy** pane.The Advisors mobile view is designed to be an express service; it is not intended to be a replacement for the desktop dashboards.

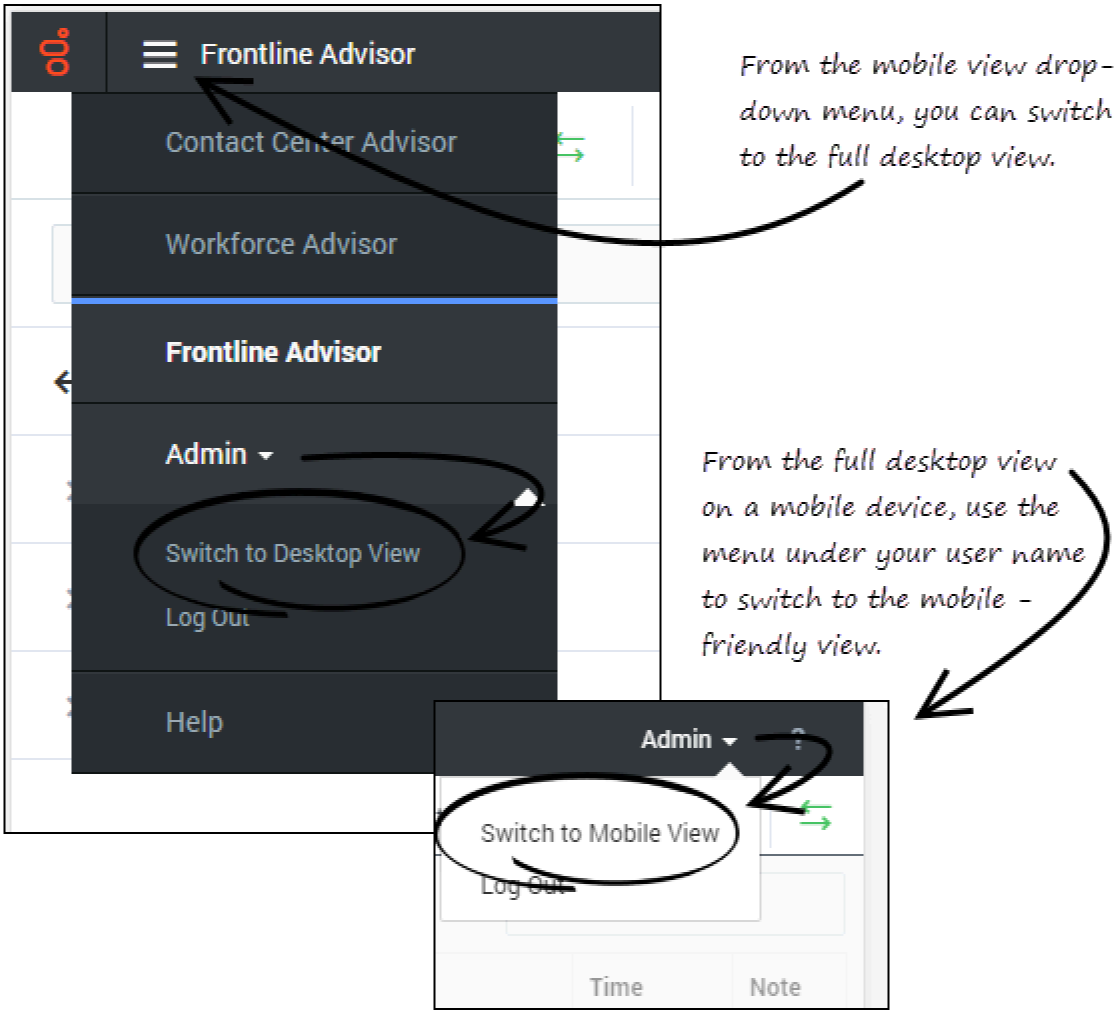
To access the mobile view on your device, open a browser that supports Advisors applications and enter the URL that you use to access your Advisors desktop application. When you initially log in, you see the the top level of the mobile view. This is the **Hierarchy** pane from the Advisors desktop application, and is presented as a list in the mobile view. You can drill down to lower levels of the hierarchy from this top-level view. For more information, see Example: Drilling down through the hierarchy in mobile view, below.

The Advisors mobile view includes tooltip information for buttons that display on the toolbar at the top of the mobile dashboard, but there are no tooltips associated with metrics. To use the mobile view effectively, you need to be familiar with at least one Advisors desktop dashboard and have an established list of metrics that you typically watch.

The Advisors mobile dashboard view uses the same formatting that is configured for the desktop application. For example, if the values for metrics show two decimal places in the desktop dashboard view, then the mobile view also shows metrics values with two decimal places.

> ### Tip
> If the browser on your smartphone includes the **Add to Home screen** option in the menu, you can use it to create a shortcut to your Advisors mobile application on your device's home screen.

Device-aware Applications

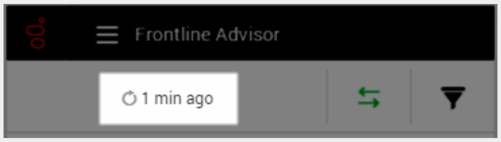
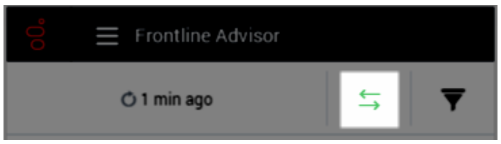
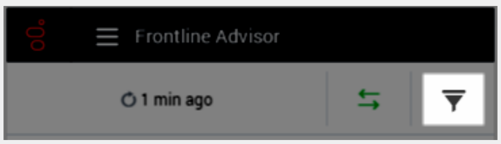


Advisors applications are device-aware. If you log in to an Advisors application on a mobile device, then the mobile view of the application opens. In the drop-down menu at the top of the mobile application, there is an option that lets you switch to the desktop view. When viewing the full Frontline Advisor dashboard on your mobile device, you can easily switch back to the mobile view by selecting that option in the menu under your user name.

There is no option to switch to the mobile-device view when you are using a desktop device to view the Advisors dashboards.

Advisors Mobile View Overview

When you initially open the Frontline Advisor application on a mobile device, you see the hierarchy that displays in your desktop application's **Hierarchy** pane. You will recognize some of the information and buttons that display on the toolbar at the top of the mobile view from your desktop application. The following table describes the toolbar options.

Toolbar option	Description
	**Last Updated timestamp:** Tap the **Last Updated** timestamp to see the precise time at which data was last generated.
	**Data Connection Status indicator:** The **Data Connection Status** indicator changes to red when the dashboard cannot connect to the Frontline Advisor server. Tap the **Data Connection Status** indicator in your mobile view to see additional status information. If the **Data Connection Status** indicator remains red for an extended period of time, report it to your system administrator.
	**Filter:** The **Filter** icon at the top of the view opens a **Filter** pane. Select and deselect items on the **Filter** pane to refine the list of metrics that you are watching. For example, you might want to view only metrics that belong to the Short time profile group, or only metrics associated with voice interactions.

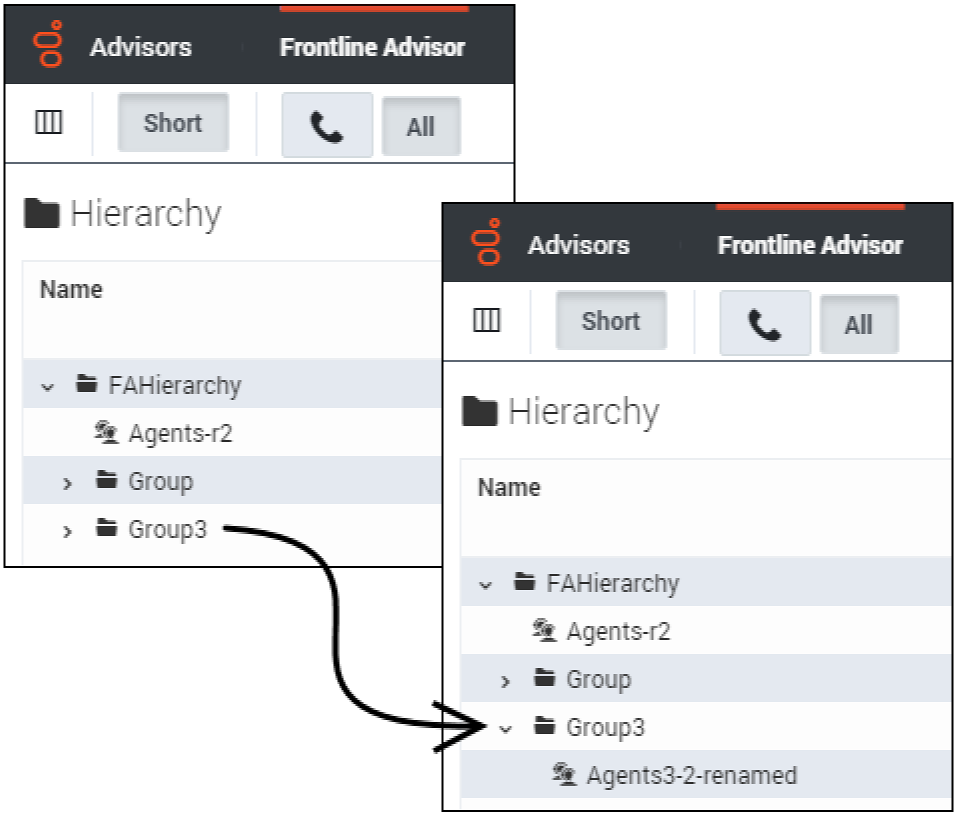
Changing the Displayed Metrics in Mobile View

Advisors mobile view does not include **Column Chooser**. If you have access to **Column Chooser**, then Genesys recommends that you use your desktop application to specify the metrics to display on your dashboard before using the mobile-friendly Frontline Advisor application. However, if you need to display a metric on your mobile view that is not currently included on your dashboard, and you do not have access to a desktop device, then you can switch to desktop view on your mobile device, open **Column Chooser**, and change the list of metrics selected for dashboard display. The display of metrics in both your desktop application and your mobile view is updated whenever you make changes to the list of selected metrics in the desktop application's **Column Chooser** window. Refresh your mobile view to see the updated selection of metrics.

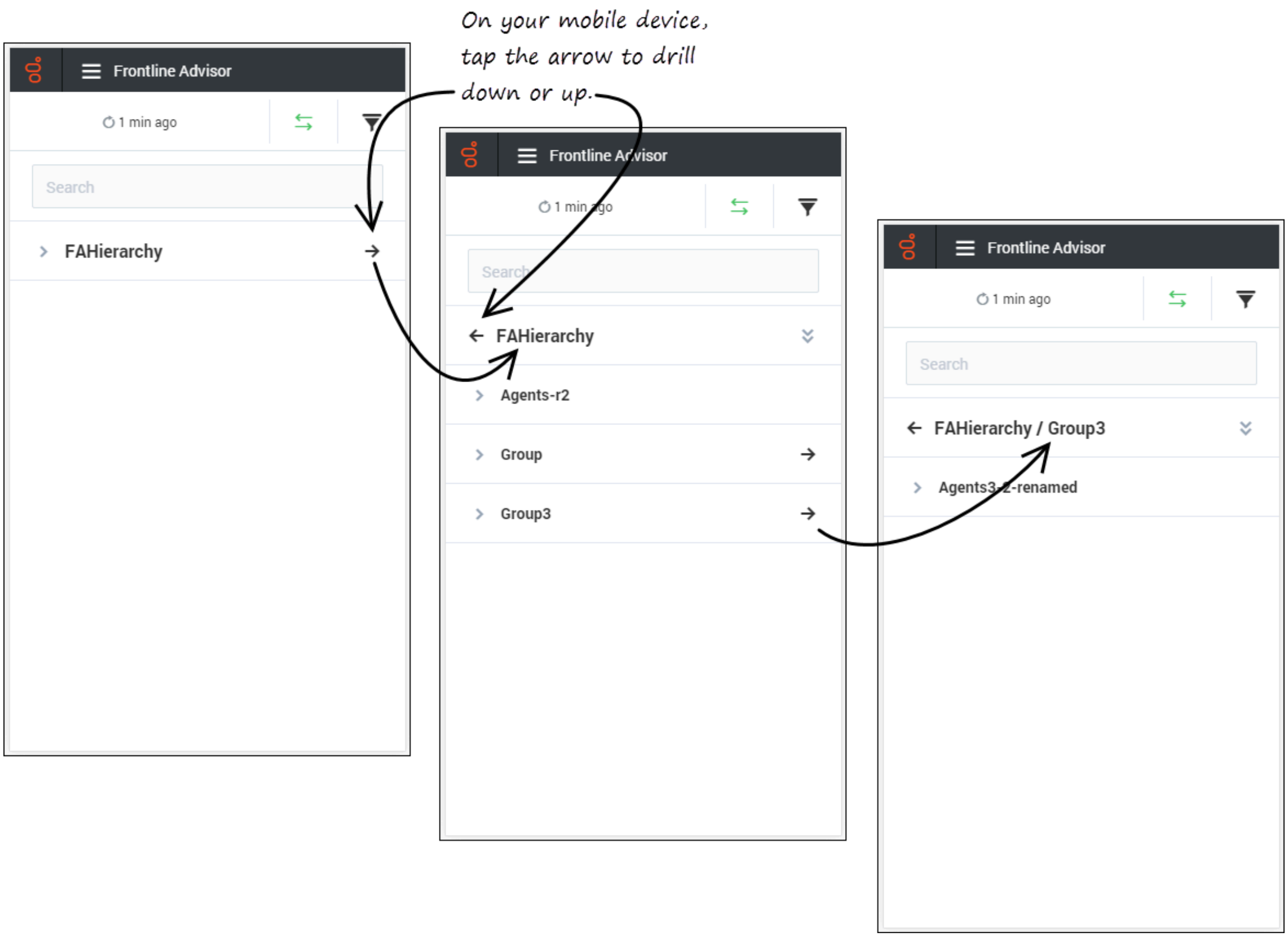
Example: Drilling down through the hierarchy in mobile view

The figures below compare navigation in the Frontline Advisor desktop application's **Hierarchy** pane with navigation in the hierarchy view on a mobile device to demonstrate how to drill down (or up) through the mobile view hierarchy to find information about business objects and how they are performing.

The following figure shows how to drill down through the hierarchy in the **Hierarchy** pane when you use the Frontline Advisor desktop application.



The following figure shows how to drill down through the hierarchy in the Frontline Advisor mobile view. This is the same hierarchy that is demonstrated in the preceding figure. In the mobile view, you tap the arrow beside a business object name to drill down or up through the hierarchy.


On your mobile device, tap the arrow to drill down or up.
Frontline Advisor
1 min ago
Search
FAHierarchy
Frontline Advisor
1 min ago
Search
FAHierarchy
Agents-r2
Group
Group3
Frontline Advisor
1 min ago
Search
FAHierarchy / Group3
Agents3-2-renamed