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Contact Center Advisor and Workforce Advisor Administrator User's Guide

Report Metrics

Contents

- 1 Report Metrics
 - 1.1 Custom Agent Group Metrics and the CCAAdv Totals & Averages Row
 - 1.2 Role Based Access Control and the Metric Manager
 - 1.3 Editing Default Metrics
 - 1.4 Creating Custom Metrics
 - 1.5 Propagating custom metric changes to the Stat Server
 - 1.6 Metric Groups
 - 1.7 Working With Metrics

Report Metrics

With the correct role-based access control (RBAC) permissions, you can view and edit all Contact Center Advisor, Workforce Advisor, and Frontline Advisor metrics on the **Report Metrics** page. Only certain attributes are editable.

You can customize the default metrics that ship with Pulse Advisors to address your specific Contact Center performance and service quality measurements. You can also use the **Report Metrics** page to create custom metrics for the dashboard.

You can search by metric name or description in all supported languages, regardless of the language you selected at login.

Any changes that you make using the **Report Metrics** page are logged in the audit log file, similar to all other logged administrative actions.

Custom Agent Group Metrics and the CCAAdv Totals & Averages Row

Genesys does not provide an equivalent agent-level metric for a custom CCAAdv agent group metric; therefore, de-duplication on the Totals & Averages line is not supported for custom agent group metrics.

Role Based Access Control and the Metric Manager

The Report Metrics Manager functionality is controlled by privileges and permissions (Role-Based Access Control), which you assign to Users and Access Groups in a Genesys configuration interface, such as Genesys Administrator. A privilege determines the actions a user can perform. A permission grants or denies viewing of individual metrics for a user.

In the Report Metrics Manager, the view, create, copy, edit, and delete actions are individually controlled by privileges. For information about Metric Manager-specific privileges, see [CCAAdv/WA Access Privileges](#) and [FA Access Privileges](#).

Use the following information if you are granting or denying Metrics Manager-related permissions and privileges to users:

- A user can view all the metrics to which he or she has a Read object permission.
- A user who can create a custom metric can also view and delete that metric, unless the View permission or the Change permission to the metric was explicitly denied in the Configuration Server after the user created the metric.
- To create custom metrics, a user must have a Create security permission granted on the Advisors Metrics Business Attributes section in Configuration Server. Without this permission, the user cannot create custom metrics. Similarly, a Change permission must be granted at the root attribute level or at the individual metric attribute value level to ensure the user can delete an existing custom metric.

Editing Default Metrics

You cannot delete Advisors' default metrics, but you can edit some of the properties. The display name, description, and the reporting application-specific formatting properties can be edited. You can also edit the following properties for metrics that have them:

- Time Range upper bound/lower bound (if applicable to the corresponding source metric)
- Notification mode and frequency
- Insensitivity
- Exclude Base Object filter
- Enabled

Creating Custom Metrics

You can create custom metrics using the **Report Metrics** page. Custom report metrics are created from Genesys Stat Server source metrics.

Important

You can create only custom application and agent group metrics for CCAAdv, and custom agent metrics for FA. You cannot create custom metrics for any other types of objects. For example, you cannot create custom metrics for contact groups.

There are two key selections you must make when you create a custom report metric:

- Select an Advisors application
- Select the object type

The **Report Metrics** page then shows the relevant custom metric configuration properties based on the Advisors application and object type you select.

You must provide an expression for the metric (that is, a formula that produces a metric value). Expressions can contain other metrics and constants (numbers) as operands, as well as the operators, functions, constructs, and symbols described in the following Table. Supported operands are included as buttons in the Expression Editor on the **Report Metric Details** page.

The elements of expressions are limited to existing standard or custom source metrics provided by the Genesys Adapter, source metrics imported from the CISCO environment, and existing CCAAdv application, CCAAdv agent group, and FA agent dashboard metrics. Metrics that are used in expressions for calculated metrics must have time profile definitions that are compatible with the calculated metric. To state it differently, time profiles for all non-point-in-time reporting metrics that are used in the expression of another metric must use a time profile definition that is the same as the time profile definition of the calculated metric. For example, if you want to create a custom report

metric that has a 30 minute sliding time profile, then metrics in the expression for that custom metric must also have a 30 minute sliding time profile.

| Metric Type | Acceptable Operands |
|----------------------------------|--|
| Calculated custom report metrics | <p>Arithmetic operators:</p> <ul style="list-style-type: none"> • + (addition) • - (subtraction) • * (multiplication) • / (division) <p>Brackets (to ensure the required operation sequence)</p> <p>You can also include the >, <, and = operators in expressions.</p> |

Example: Expression Field Entries

The following examples demonstrate valid formulas you can enter into the Expression Field. If you have multiple operands in the expression, it is important to use parentheses to group the calculations.

- Custom metric is a sum: Enter (<Metric1>+<Metric2>). For example, (CallsAnsweredTo5+RouterCallsAbandQTto5).
- Custom metric is a percentage-based metric: Enter 100*(<Metric1>/<Metric2>). For example, 100*(RouterCallsQNow/STF). For this type of expression, you must start the expression with the 100* component followed by the metric calculation, as shown in the example.
- Custom metric measures the longest value for an activity or state: Enter (DateTime - <AgentGroupMetric>). For example, (DateTime - RouterLongestCallQ)

Propagating custom metric changes to the Stat Server

If you create a new custom metric, or make changes to an existing metric that must be propagated to the Stat Server, these changes are applied during the overnight refresh. The dashboard shows values for any newly-added custom metrics only after the changes have been applied. This is applicable to both CCAdv/WA and FA metrics.

Enabling a disabled metric or disabling an enabled metric is applied to the Stat Server during the overnight refresh.

Metric Groups

Every raw custom report metric must be assigned to a Metric Group. This is not applicable to calculated report metrics; you do not assign them to metric groups.

A metric grouping indicates applicability of metrics to configured objects, which determines if metric statistic(s) must be requested for a certain object. See the *Working with Metric Groups* page for an example.

The default selection for a new metric is the Default metric group. When creating a custom metric, you can assign the metric to another available metric group. You also have the option to create a new metric group and assign the report metric to that new group.

After you create a metric group, it is available for selection for subsequent metric grouping. The metric group information for a report metric is not stored in the Genesys Configuration Server.

See the *Working with Metric Groups* page for more information about the metric groups and how to manage them.

Working With Metrics

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Metric Properties Descriptions=

The following Table provides descriptions of the metric properties.

| Property | Advisors Application | Object Types | Editable For | Description |
|------------|----------------------|---|--------------|--|
| Short Name | FA, CCAdv, WA | FA: Agent CCAdv: Agent Group or Application WA: Contact Group | None | The name of the metric that uniquely identifies it for internal purposes. This field is system generated. You can only view this property; you cannot edit it. |
| Language | FA, CCAdv, WA | FA: Agent CCAdv: Agent Group or Application WA: Contact Group | All | A drop-down list that includes supported languages for your release. English is the default value. Your selection for this parameter controls the language property for the metric |

| Property | Advisors Application | Object Types | Editable For | Description |
|--------------|----------------------|--|--------------|---|
| Display Name | FA, CCAAdv, WA | FA: Agent CCAAdv: Agent Group or Application WA: Contact Group | All | <p>display name and description.</p> <p>The name used for display in the column chooser and dashboard. The name must be unique for a given channel and language. The display name property accepts 128 characters or less. The default language of the display name is English, but you can specify the name in another supported language using the Language parameter in the Report Metrics manager.</p> <p>NEW Manually Adding a Display Name</p> <p>If there is no display name provided for a metric that you want to enable, or if the display name field contains Not Displayed, then you can provide a meaningful display name manually.</p> <p>When adding a display name manually, you must use the following two rules:</p> <ul style="list-style-type: none"> • The display name must be something other than Not Displayed. • Display names must be unique within each language and |

| Property | Advisors Application | Object Types | Editable For | Description |
|-------------|----------------------|---|--------------|---|
| | | | | <p>channel. The administration module will reject a display name if it is already used by another enabled metric within a given language and channel.</p> <p>While each metric display name must be unique for enabled metrics within each language group, you can use identical display names (and descriptions) amongst the three available languages. That is, you can enter a display name for a metric in English, copy and paste that display name to the German-language and French-language versions of that same metric, and then successfully enable the metric in all three languages. See also Manually Adding a Description for information about manually adding a description to a metric.</p> |
| Description | FA, CCAdv, WA | FA: Agent CCAdv: Agent Group or Application WA: Contact Group | All | The metric description. The default language of the description is English, but you can specify the description in another supported language using the Language parameter in the Report Metrics manager. |

| Property | Advisors Application | Object Types | Editable For | Description |
|---------------------|----------------------|--|---------------|---|
| | | | | <p>NEW Manually Adding a Description</p> <p>If there is no description provided for a metric that you want to enable, then you can provide a description manually.</p> <p>You can use identical descriptions (and display names) amongst the three available languages. That is, you can enter a description for a metric in English, copy and paste that description to the German-language and French-language versions of that same metric, and then successfully enable the metric in all three languages. Be sure to read Manually Adding a Display Name for additional information about entering a display name manually.</p> |
| Advisor Application | FA, CCAAdv, WA | FA: Agent CCAAdv: Agent Group or Application WA: Contact Group | Custom Metric | A drop-down list with values representing each supported reporting application. The default value is Contact Center Advisor. Your choice of reporting application is reflected in the values available for the Object Type parameter. |
| Object Type | FA, CCAAdv, WA | FA: Agent CCAAdv: Agent Group or Application WA: Contact Group | Custom Metric | A drop-down list containing the options available for the Advisor Application you selected. For example, if you selected Contact Center Advisor as |

| Property | Advisors Application | Object Types | Editable For | Description |
|--------------|----------------------|--|---------------|--|
| | | | | the Advisor Application, Application is one of the options in the Object Type list. |
| Calculation | FA, CCAAdv, WA | FA: Agent CCAAdv: Agent Group or Application WA: Contact Group | Custom Metric | Formerly Metric Type. Select a radio button to indicate if the custom metric is Raw or Calculated. |
| Summary Type | FA, CCAAdv, WA | FA: Agent CCAAdv: Agent Group or Application WA: Contact Group | Custom Metric | <p>A drop-down list containing options that determine how aggregation is to be performed when rolling up the metric to the higher level of the hierarchy:</p> <ul style="list-style-type: none"> When the metric type is Raw, the options are: <ul style="list-style-type: none"> SUM MIN MAX When the metric type is Calculated, Summary Type is not applicable (None). |
| Metric Group | FA, CCAAdv, WA | FA: Agent CCAAdv: Agent Group or Application WA: Contact Group | Custom Metric | For a custom metric, a drop-down list with values for all available metric groups. There is one metric group that ships with Advisors – Default. To create your own metric group, click Create New |

| Property | Advisors Application | Object Types | Editable For | Description |
|----------|----------------------|---|--------------|--|
| | | | | <p>Metric Group. On confirmation, the new metric group name is appended to the list of metric groups, and is automatically selected in the drop-down. The new metric group value is saved as part of the custom metric creation process, and is subsequently available for selection for other metrics.</p> <p>The metric group name is case-sensitive. A metric group labelled MG is a different metric group from one labelled mg.</p> |
| Enabled | FA, CCAdv, WA | FA: Agent CCAdv: Agent Group or Application WA: Contact Group | All | <p>Formerly Display on Column Chooser. Select a radio button to specify whether the metric displays in the Column Chooser (Enable) or not (Disable).</p> <p>Disabling a raw report metric means that the corresponding source metrics are not collected at the data source for the respective reporting application. In the case of Genesys Stat Server, you can reduce the load on the Stat Server by disabling unused metrics for a reporting application. However, note that each raw report metric is evaluated in two cases:</p> <ol style="list-style-type: none"> 1. when directly enabled 2. when indirectly |

| Property | Advisors Application | Object Types | Editable For | Description |
|-------------------------|----------------------|--|---------------|---|
| | | | | <p>enabled by its participation in the calculation of another enabled metric</p> <p>Therefore, to completely disable a raw report metric so it is not collected at the data source, you must both disable the metric and ensure it is not used in the calculation of another metric that is enabled. You can re-enable any disabled metric by updating the Enabled checkbox. Disabling or enabling raw report metrics takes effect on overnight refresh or on restart. Disabling a metric for Contact Center Advisor means that CCAAdv does not calculate the metric or send values for it to the dashboard. The effect of disabling takes place at the start of the next Short processing cycle in CCAAdv XML Generator.</p> |
| Channel | FA, CCAAdv, WA | FA: Agent CCAAdv: Agent Group or Application WA: Contact Group | Custom Metric | A drop-down list containing options to specify the media channel type for which the custom metric is shown in the Column Chooser and on the dashboard. |
| Decimal | FA, CCAAdv, WA | FA: Agent CCAAdv: Agent Group or Application WA: Contact Group | All | A drop-down list containing options you can use to specify the number of decimal places to display for metric values. |
| Initial Sequence Number | FA, CCAAdv, WA | FA: Agent CCAAdv: Agent Group or Application WA: Contact Group | All | Formerly Sequence Number. Use this parameter to specify the initial column order |

| Property | Advisors Application | Object Types | Editable For | Description |
|----------------------|----------------------|---|---------------|---|
| | | | | sequence in which to place the metrics on the dashboard. Clicking Reset in the dashboard's Column Chooser displays the metrics with a sequence number, in the order specified by the number. |
| Reorder Columns | FA | Agent | Custom metric | By default, the checkbox is cleared. Select the check box to allow users to re-order the column positions on the dashboard. |
| Threshold Applicable | CCAdv, WA | CCAdv: Application WA: Contact Group | All | Formerly Threshold. When creating a custom metric, the checkbox is cleared by default. If this box is checked, you can define thresholds for the metric on the Application Groups/Thresholds page. If this box is cleared, then you will not be able to define thresholds on that page. |
| Threshold/Chart | CCAdv, WA | CCAdv: Application WA: Contact Group | All | Enter values for the threshold range (minimum and maximum). These values also determine the y-axis values in a graph. |
| Display over 100% | CCAdv, WA | CCAdv: Application WA: Contact Group | All | A format option. When creating a custom metric, the checkbox is selected by default. A checkmark in the box |

| Property | Advisors Application | Object Types | Editable For | Description |
|----------------|----------------------|--|---|---|
| | | | | <p>indicates that values over 100 display actual values. If the checkbox is cleared, values over 100 display as 100+.</p> |
| Format Pattern | FA | Agent | All | <p>A drop-down list containing options to specify the general structure of the metric. The default selection is Number.</p> |
| Time Profile | FA, CCAdv, WA | <p>FA: Agent CCAdv: Agent Group or Application WA: Contact Group</p> | <p>All, but with qualifications:</p> <ul style="list-style-type: none"> • CCAdv/WA: Fully editable for custom metrics. For default metrics, you can enable or disable charting only. • FA: You can enable or disable the time profile only. | <p>Select a radio button to indicate if the time profile is Point in Time or Historical. Point in Time on the Metric Details page is the Current time profile with a duration of 0.</p> <p>You can assign a time profile group (Short, Medium, or Long) to a point-in-time custom report metric for an application or agent group in the Time Profile section. The time profile interval and time profile type are not shown for the point-in-time metric. XML Generator creates alerts only for metrics that are mapped to the Short time profile group.</p> <p>If you select the Historical time profile, available additional options are dependent on the Advisors component with which the metric is associated:</p> <ul style="list-style-type: none"> • CCAdv: <p>When you select the Historical radio button, you can configure up to three time profiles in the Time Profile table. You must specify at least one. Use the Enabled checkbox to enable and</p> |

| Property | Advisors Application | Object Types | Editable For | Description |
|----------|----------------------|--------------|--------------|---|
| | | | | <p>disable CCAAdv metrics by time profile.</p> <p>The allowed time interval for an enabled profile is from 1 minute to 24 hours. The default time intervals are:</p> <ul style="list-style-type: none"> • 5 minutes for a Short group • 30 minutes for a Medium group • 24 hours for a Long group <div data-bbox="1260 961 1507 1472" style="border: 1px solid #00a0e3; padding: 10px; margin: 10px 0;"> <p>Tip</p> <p>NEW Custom historical chat and email agent group metrics that use the Short, Medium, or Long time profile group, and which you enable, are available in the Column Chooser for display on the dashboard. Previously, Contact Center Advisor could display only Short email and chat agent group report metrics on the dashboard.</p> </div> <p>For each enabled time profile, you must also indicate the time profile type (Sliding or Growing). The default type for each time profile group is:</p> <ul style="list-style-type: none"> • Sliding for a Short group |

| Property | Advisors Application | Object Types | Editable For | Description |
|----------|----------------------|--------------|--------------|---|
| | | | | <ul style="list-style-type: none"> • Growing for a Medium group • Growing for a Long group <p>The Chart checkbox is available for CCAAdv application-type metrics. The checkbox is cleared, by default.</p> <p>Metrics that are used in formulas for calculated metrics must have time profile definitions that are consistent with the calculated metric. For example, to create a custom metric that has a 30 minute sliding time profile, all metrics used in the expression for the custom metric must also have a 30 minute sliding time profile.</p> <ul style="list-style-type: none"> • WA: <p>The Chart checkbox is available for WA contact group-type metrics. The checkbox is cleared, by default.</p> • FA: <p>You can enable and disable metrics for FA by time profile in the Time Profile table; you can specify which metrics are enabled for a given time profile and disable metrics that are not required for that time profile.</p> <p>The time profile durations displayed in the</p> |

| Property | Advisors Application | Object Types | Editable For | Description |
|----------|----------------------|--------------|--------------|--|
| | | | | <p>Time Profile table are those that are configured in the FA administration page. You cannot edit the time profiles in the Report Metrics manager; you continue to configure and edit the FA time profiles in the FA administration page.</p> <p>To enable a time profile for a specific metric, both of the following conditions must be true:</p> <ul style="list-style-type: none"> the time profile is enabled at the application level (that is, on the Settings tab of the FA administration page) the time profile is enabled for that metric in the Report Metrics manager <p>To disable a time profile, you need to disable the time profile in only one of the preceding locations.</p> <p>The results of enabling a time profile for a particular metric are the following:</p> <ul style="list-style-type: none"> The metric is available in the column chooser and dashboard for display for its enabled time profiles. The aggregation engine |

| Property | Advisors Application | Object Types | Editable For | Description |
|----------|----------------------|--------------|--------------|---|
| | | | | <p>calculates the metric for the enabled time profiles.</p> <div data-bbox="1300 470 1511 1108" style="border-left: 2px solid orange; padding-left: 10px; margin-top: 10px;"> <p>Important</p> <p>You can enable or disable time profiles for calculated metrics irrespective of their associated operand-level metrics. The disabled time profile for the operand-level metric impacts only the visibility of that metric on the dashboard.</p> </div> <p>FA time profile durations cannot be configured on a per-metric basis; therefore, calculated metrics are limited to the time profiles configured in the FA administration page.</p> <p>Default settings are:</p> <ul style="list-style-type: none"> • all of the time profiles for the default metrics are enabled in the Report Metrics manager • only the first time |

| Property | Advisors Application | Object Types | Editable For | Description |
|----------|----------------------|--------------|--------------|---|
| | | | | <p>profile in the Settings tab of the FA administration page is enabled (consistent with previous releases).</p> <p>Changes to time profile settings in the FA administration page are automatically updated in the Report Metrics manager. However, enabling or disabling time profiles for FA metrics in the Report Metrics manager require you to reload the FA hierarchy before the changes are propagated to the FA application; you can reload the hierarchy manually, or wait for the overnight refresh.</p> |

Expression Editor

Use the Expression Editor to build the formula that produces a value for your custom metric.

| Property | Description |
|---------------------------|---|
| Channel and Metric tables | Use the Channel and Metric tables to find existing metric expressions that you can use in the calculation of your new custom metric. The entries from the list of metrics serve as operands for building the expression. When creating a raw report metric, the operands available are source metrics. And when creating a calculated report metric, the operands available are other raw report metrics and other calculated report metrics. |
| Metric Description | When you select a metric in the Metric table, a description of that metric displays in the Metric Description box. |
| Expression Field | You build the expression, or formula, for your custom metric |

| Property | Description |
|----------------------------|--|
| | <p>in the Expression Field. Use the buttons above the field to add operands to the expression of a calculated metric.</p> <p>You might see two expression fields for some agent group metrics. This happens when the calculation for individual agent groups is different from the totals and averages calculation. If you are creating a custom agent group metric, you can specify only one calculation expression to be applied in both individual agent groups and totals and averages calculations.</p> <p>You might see two expression fields for some agent group metrics. This happens when the calculation for individual agent groups is different from the totals and averages calculation. If you are creating a custom agent group metric, you can specify only one calculation expression to be applied in both individual agent groups and totals and averages calculations.</p> |
| Notification Mode | <p>Available for raw metrics and only when the selected source metric belongs to a Genesys Stat Server data source. See the <i>Stat Server User's Guide</i> for more information.</p> <p>Select a value from the drop-down list. The default value is Time Based. This means that Stat Server will notify the adapter periodically based on the notification frequency. Changed Based means that the Stat Server will notify the adapter as soon as the values change in Stat Server.</p> |
| Notification Frequency | <p>Available for raw metrics and only when the selected source metric belongs to a Genesys Stat Server data source. See the <i>Stat Server User's Guide</i> for more information.</p> <p>Specify a non-negative integer. The default value is 0. This field is enabled only when the notification mode is Time Based.</p> |
| Insensitivity | <p>Available for raw metrics and only when the selected source metric belongs to a Genesys Stat Server data source. See the <i>Stat Server User's Guide</i> for more information.</p> <p>Specify a non-negative integer. The default value is 0, which indicates that insensitivity is not applied.</p> |
| Exclude Base Object Filter | <p>Available for raw metrics and only when the selected source metric belongs to a Genesys Stat Server data source. Exclude base object filter is a property of the statistic template. See the <i>Stat Server User's Guide</i> for more information.</p> <p>The checkbox is available for Contact Center Advisor application and agent group metrics. Select the checkbox to exclude the base object configuration filter when statistics are requested for the metric. The checkbox is cleared, by default.</p> <p>[+] Additional information about Exclude Base Object Filter</p> <p>When a Genesys Stat Server filter is combined with an agent group or a queue, and the combination is published on the CCAdv administration module's Base Object configuration page, the statistic for any metric for which you opted to exclude the base object filter is requested, but without the object configuration filter.</p> <p>The same base object configuration filter is applied on all the statistics that are requested for a given source object. All default CCAdv application metrics are configured to include this object configuration filter.</p> |

| Property | Description |
|--|--|
| | <p>However, because the configured filter is applied to all the statistics, there will be circumstances when you must exclude some of the metrics from being subjected to this "blanket" filter. For example, on the agent state-based agent group metrics, you should not apply an interaction-based filter; it could result in incorrect results. In such cases, you use this property to specify which metrics to exclude from the filter. For example, the default interaction queue metrics and the calling list metrics are configured to exclude the base object filter.</p> <p>On the CCAAdv dashboard, each filtered combination displays on a separate line. Any metric that is excluded from the base object configuration filter is shown on a separate line as an unfiltered metric for the selected agent group or queue.</p> <p>The Exclude Base Object Filter property does not influence the Stat Server filter that is specified at the source metric level. The property in Metric Manager is called the <i>base object filter</i> to help you distinguish between the Stat Server filter that is applied on the filtered source metric, and the Stat Server filter that is applied at the base object level.</p> <p>It is possible that both filters (the metric filter and the object configuration filter) must be applied to a certain metric. In such cases, the filters are combined; both filtering conditions must be met for a statistic value to be reported for that metric.</p> |
| <p>Time Range Lower Bound and Time Range Upper Bound</p> | <p>The Time Range Lower Bound and Time Range Upper Bound fields are enabled for raw metrics, and only when the selected source metric is based on a category that requires a time range. For example, TotalNumberInTimeRange.</p> <p>Available for CCAAdv raw report metrics only. Specify a non-negative integer. The upper bound must be greater than the lower bound. The default value is 0.</p> |

| - | How To...=

Use the following procedures to help you work with the Metric Manager.

For information about changing the default Service Level threshold setting, see [Change the Default Service Level Threshold Setting](#).

Procedure: View Information about a Metric

Prerequisites

- You require the privilege that grants you access to the Administration module and the privilege that grants you access to the Metric Manager to perform this procedure.
- You require permission to view at least one metric.

The **Report Metrics** page displays only the metrics to which you have Read permission in the Configuration Server.

Steps

1. In the Administration module, click **Report Metrics** in the navigation pane.
2. Locate the metric for which you want to view detailed information.

To assist you when searching for a specific metric, use the filters on the right side of the page to reduce the number of metrics that display. By default, all filters are selected.

Use the page navigation arrows under the list of metrics to move between pages of metrics. By default, the metrics are displayed in alphabetical order.

3. Click a metric to select it. Details about the metric display at the bottom of the **Report Metrics** page.

Procedure: Create a Custom Metric

Prerequisites

- You require the privilege that grants you access to the Administration module and the privilege that grants you access to the Metric Manager to perform this procedure.
- You require the Create permission in the Configuration Server for the Advisors Metrics Business Attribute on the default tenant.
- You require the privilege that grants you access to the **Create** button.
- Read the notes in the section called [Creating a Custom Metric](#) for important information about correctly building a custom metric, including how to build the expression for a custom metric.

Steps

1. In the Administration module, click **Report Metrics** in the navigation pane.
2. Click **New**.

The **Metric Details** page opens.

3. Enter information to define the new metric. Ensure you enter information into all required fields.

For descriptions of the metric properties, see the **Metric Properties Descriptions** tab on this page.

4. If you want to return the **Metric Details** page to the default settings, click **Reset**.
5. Click **Save** to save the metric.

If you entered all information correctly, the page returns to the **Report Metrics** page. The new metric displays in the list of metrics.

Procedure: Copy a Metric to Create a Custom Metric

Prerequisites

- You require the privilege that grants you access to the Administration module and the privilege that grants you access to the Metric Manager to perform this procedure.
- You require the Create permission in the Configuration Server for the Advisors Metrics Business Attribute on the default tenant.
- You require permission to view the metric that you want to copy.
- You require the privilege that grants you access to the **Save as** option.
- Read the notes in the section called [Creating a Custom Metric](#) for important information about correctly building a custom metric, including how to build the expression for a custom metric.

Steps

1. In the Administration module, click **Report Metrics** in the navigation pane.
2. Select the custom or standard metric that you want to use as a template for a new custom metric.

You can use application or agent group metrics as templates for new CCAAdv custom metrics, and agent-level metrics for new FA custom metrics.

If you select a standard dashboard metric as a template for a new custom metric, the expression of the original standard metric might not be supported in the new custom metric. You must edit the calculation to limit operands to those supported by the custom dashboard metric creation process. See [Creating a Custom Metric](#) for important information about correctly building a custom metric.

3. Click the **Save as...** option. The **Metric Details** page opens.
4. Edit information to define the new metric. Ensure you enter a new display name for the new custom metric. Ensure you enter information into all required fields.

For descriptions of the metric properties, see the **Metric Properties Descriptions** tab on this page.

5. Click **Save** to save the metric.

If you entered all information correctly, the page returns to the **Report Metrics** page. The new metric displays in the list of metrics.

Procedure: Edit a Metric

Prerequisites

- You require the privilege that grants you access to the Administration module and the privilege that grants you access to the Metric Manager to perform this procedure.

- You require permission to view the metric that you want to edit.
- You require the privilege that grants you access to the **Edit** option.

Important

You require the `AdvisorsAdministration.MMW.canEdit` privilege to edit metrics, but a `Change` permission is not required in the Configuration Server for the metric business attribute value because none of the edited information is updated on the Configuration Server after the initial creation of the business attribute value.

Steps

1. In the Administration Module, click **Report Metrics** in the navigation pane.
2. Select an existing metric to edit.
3. Click **Edit**. The **Metric Details** page opens.
4. Edit the metric properties.

The metric properties you can edit are dependent on the type of metric you selected to edit. Your ability to edit standard (default) metrics is limited. For example, the expression editor is always disabled for standard metrics. If you want to edit a standard metric, you must copy the metric and save it as a new custom metric.

If you change the display name or description of a metric, the information is updated in Advisors only and is not propagated to the Configuration Server.

5. Click **Save** to save the metric.

If you entered all information correctly, the page returns to the **Report Metrics** page. The metric displays in the list of metrics.

Procedure: Delete a Custom Metric

Prerequisites

- You require the privilege that grants you access to the Administration module and the privilege that grants you access to the Metric Manager to perform this procedure.
- You require permission to view the metric that you want to delete.
- You require a `Change` permission in the Configuration Server for the business attribute that represents the metric that you are deleting.

- You require the privilege that grants you access to the **Delete** option.

Important

Deleting a custom metric deletes the record in Advisors and also deletes the business attribute value under the Advisors Metrics Business Attributes section in the Configuration Server.

Steps

1. In the Administration module, click **Report Metrics** in the navigation pane.
2. Select a custom metric to delete.
3. Click **Delete**.

If a raw report metric is used in a calculation for a calculated report metric, you cannot delete that raw report metric. If you attempt to delete a metric that is used in another metric calculation, Advisors displays an error message.

Procedure: Enable Graphing of Metrics (CCAdv/WA)

Purpose:

A Metric Graphing window is accessible from both Contact Center Advisor and Workforce Advisor. You specify which combination of metrics and time profiles to graph using the **Chart** checkboxes in the **Time Profile** table.

You can choose to graph Application-type metrics in CCAdv, and Contact Group-type metrics in WA.

If you attempt to enable more metrics for graphing than the limit configured in the database, a warning message displays stating that the maximum number of metrics that can be graphed has been exceeded. You cannot save updates in the Metric Manager until you reduce the number of metrics enabled for graphing.

Steps

1. Open the Administration module.
2. Click **Report Metrics** in the navigation pane.

3. Use the filters on the **Report Metrics** page (on the right) to show as many or as few metrics as required.
4. Do one of the following:
 - Select an Application-type metric or a Contact Group-type metric and click **Edit** in the **Actions** column to open the **Metric Details** page.
 - Click **Create** to open the **Metric Details** page and create a new Application-type custom metric.
5. On the **Metric Details** page, select the applicable time profile.

The **Time Profile** radio buttons are grayed out (that is, you cannot change the time profile) for default metrics.

6. To enable the metric for graphing, select at least one time profile from the **Time Profile** table, and select the **Chart** checkbox.

The **Time Profile** table offers only one time profile group if the **Point in Time** radio button is selected, and three possible time profile options if the **Historical** radio button is selected.

Each historical metric that can be graphed can have more than one time profile for graphing. For example, you can enable both AHT 30 Min Growing and 5 Min Sliding for graphing.

Procedure: Propagate Changes to Column Chooser in CCAdv and WA

Purpose:

A change you make in the **Report Metrics** page does not appear immediately in the Column Choosers in the dashboards. This applies to any kind of change, whether to a default metric, or to a custom metric, including creation or deletion of the latter.

Steps

1. Save or apply the change on the **Report Metrics** page.
2. Log out of Advisors.
3. Wait at least five minutes for the changes to be read from the Advisors database into cached data.
4. Log in to Advisors.
5. In the appropriate dashboard, open the Column Chooser. You should see your changes reflected there.

Procedure: Propagate Changes to Column Chooser in FA

Purpose:

A change you make in the **Report Metrics** page does not appear immediately in the Column Choosers in the dashboards. This applies to any kind of change, whether to a default metric, or to a custom metric, including creation or deletion of the latter.

Steps

1. Save or apply the change on the **Report Metrics** page.
2. In the FA Administration page, **Settings** tab, click the **Hierarchy Reload** button. Alternatively, wait until the nightly reset procedure has executed.

Note that new report metrics will not be displayed in the accessible dashboard until the application server is restarted.

| - | Changing the Custom Metric Internal Name Prefix =

Custom metrics for Advisors have a standard, auto-generated `CM__metric_id` internal name. You might have several Advisors installations that use the same Genesys Configuration Server, and if an administrator creates a custom report metric in each of two different installations, but uses the same metric ID (and, therefore, the same name), one metric overwrites the other in the Configuration Server. Overlapping metrics loaded into the Configuration Server impact permission settings for different installations. These metrics can also be deleted with a negative impact on other installations.

To resolve these types of issues, the `Config_Parameter` table of the Advisors Platform database includes a parameter, `custom.metric.name.prefix`, that governs the custom metric naming space within the installation. The figure shows the parameter.

| PARAM_NAME | PARAM_VALUE | DESCRIPTION |
|--|------------------|--|
| 1 ldap.enabled | false | Is LDAP authentication enabled for the security provider |
| 2 install.version | 8.5.001-SNAPSHOT | Installation version |
| 3 warehoused.metrics.min.interval.secs | 120 | Minimum number of seconds between timestamps of metrics |
| 4 warehoused.metrics.max.minutes.kept | 1440 | Maximum minutes' worth of values to keep for metrics in |
| 5 metric.graphing.enabled | true | Value is true if metric graphing is enabled, otherwise |
| 6 contact.center.available.in.skill.groups.chooser | false | Is the Contact Centers column available in the column |
| 7 show.totals.and.averages | false | Is the totals and averages row shown in the skill group |
| 8 ccadv.wa.integrated.configuration | false | CCAdv/WA integrated configuration mode. If set to true |
| 9 skill.group.metrics.period.type | ThirtyMin | Legal values are FiveMin and ThirtyMin. Time period of |
| 10 warehoused.metrics.start.at.midnight | true | Legal values are true and false. If true, graphed metr |
| 11 warehoused.metrics.period.type | ThirtyMin | Legal values are FiveMin and ThirtyMin. Time period of |
| 12 enableSnapshot | true | This flag controls whether the snapshot features are en |
| 13 platform.db.tz-offset.mins | 0 | Minutes difference between platform application server |
| 14 max.metrics.graphing.enabled | 15 | Maximum number of metrics for which graphing can be en |
| 15 max.custom.metric.id | -1 | Maximum custom metric id |
| 16 min.custom.metric.id | -5320 | Minimum custom metric id |
| 17 violation.retention.time.min | 30 | The number of minutes passed after start time. Used to |
| 18 partition.admin.can.create.new.rr.ou | true | Partition Administrators can create new Reporting Regi |
| 19 partition.admin.can.view.other.objects | true | Partition Administrators can view objects associated w |
| 20 ccadv.grouping.default.index | 4 | The index of the default grouping in Contact Center A |
| 21 wa.grouping.default.index | 4 | The index of the default grouping in Workforce Adviso |
| 22 warehoused.metrics.forecast.minutes.displayed | 1440 | Minutes forward for displaying forecast metric charts. |
| 23 ccadv.agent.reporting.on | 0 | Agent reporting on/off. |
| 24 custom.metric.name.prefix | (null) | A prefix to be used in custom metric short names. If t |

The custom.metric.name.prefix parameter in the Config_Parameter table of the Platform database. A value of "null" means the Metric will use the default prefix (CM) for the internal name of new custom report metrics.

The value you enter for this parameter becomes the prefix for custom report metric names and replaces the standard CM prefix in the internal system name. This lets you differentiate and isolate the metrics created in different installations and therefore avoid any conflicts at the Configuration Server level.

When you change the value for the custom.metric.name.prefix parameter, it immediately triggers the replacement of all custom metric names with a name that uses the specified prefix. The names of custom metrics used as operands in calculation expressions are also replaced.

You must run the Advisors Object Migration Wizard to import the metrics for which you specified a new prefix into the Configuration Server. Users of the Advisors interface who were logged in when you configured the prefix must log out and log in again to gain access to the metrics with the new names. All new custom metrics are created with the new prefix.

The Advisors administrator must ensure the prefixes are unique within the existing set of Advisors installations. There is no restriction on the number of metric prefix changes, but Genesys recommends that you carefully manage the number of obsolete metrics in Configuration Server and that you remove metrics that no longer exist in any Advisors installation.