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Contact Center Advisor and Workforce Advisor Administrator User's Guide

Pulse Advisors 8.5.1

1/27/2022

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

Contact Center Advisor (CCAdv) and Workforce Advisor (WA) provide your company with the capability to view and analyze contact center and workforce management operations using real-time information from a central point of reference. Information business technology and operations personnel can proactively manage both business and technical aspects of the contact center operations and take action to correct problems before they affect business operations.

Contact Center Advisor and Workforce Advisor provide a real-time display of contact center activity and workforce management for contact centers throughout the enterprise. Predefined alerting conditions on applications and contact groups are established to display alerts on the dashboard, as well as notify designated contacts. In Genesys Advisors, applications are queues, calling lists, or interaction queues from Genesys Stat Server, or services or call types from CISCO ICM. Contact groups are activities from Genesys WFM, contact types from IEX TotalView, and forecast groups or staff groups from Aspect eWFM. In addition, Cisco ICM peripherals are monitored and can activate an alert when they go offline.

Alert Management provides the ability to record the action taken to resolve one or more alert violations, as well as the results of that action. Each action is recorded in a separate key action report. The key action reports create a knowledge base that helps identify repetitive patterns and resolve future violations more rapidly.

With Resource Management you can change the skills, skill levels, status and call-routing behavior of agents, as well as notify the affected parties of the actions by e-mail. Changes are published to Genesys operational systems so that they have immediate impact on contact center operations.

The *Contact Center Advisor and Workforce Advisor Administrator User's Guide* is primarily intended for system administration-level users of the Contact Center Advisor and Workforce Advisor modules. This document focuses on using the features and functions of the System Administration module. In particular, it is a reference for system administrators responsible for configuring Contact Center Advisor and Workforce Advisor, including configuring applications and contact groups.

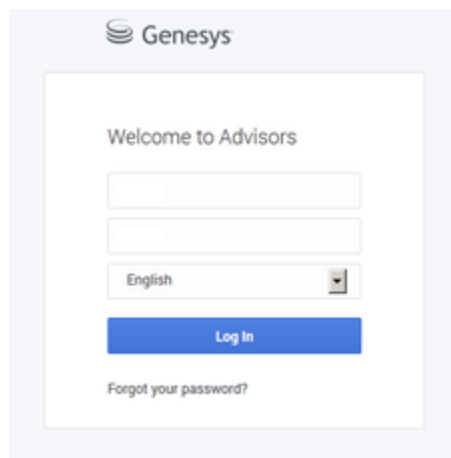
Accessing Genesys Performance Management Advisors

Prior to Genesys Performance Management Advisors release 8.5.0, you accessed Advisors modules using the Genesys Advisors browser. Starting in release 8.5.0, there is no longer a standalone Advisors browser. Advisors modules run in a standard, commercially-available browser. See the [Genesys Supported Operating Environment Reference Guide](#) for information about supported browsers in which you can use the Advisors modules.

Contact Center Advisor and Workforce Advisor must be connected to the Genesys environment to function; it is not strictly necessary for the Advisors servers to have Internet access.

<tabber>

About=



You open the Advisors login page in a supported browser. If you do not have the correct URL to open the Advisors login page, see your system administrator.

The Advisors login page is shown in the Figure, "Advisors login page". Click the image to view it full-size.

Permissions for your user account are loaded when you log in. If you log in to Advisors, and a new object is added to Genesys Configuration Server, it is not added to your view until you log out and log in again (that is, if you have the necessary security permissions to view the object). Similarly, to see objects that were activated in Advisors after you logged on, you must log out and log in again.

|< How To ...=


Procedure: Log in to and out of the Advisors interface


Steps

1. Open a supported browser.
See the *Genesys Supported Operating Environment Reference Guide* for information about supported browsers in which you can run the Advisors modules.
2. Enter the Advisors URL provided by your system administrator in the browser address bar. If you do not have the correct URL to open the Advisors login page, see your system administrator.
3. Type a user name and password.
4. Select the language of your choice from the dropdown menu.
The available language options are dependent on your release of Advisors. For information about which languages are supported in your release of Advisors, see the Advisors Read Me or the Advisors Release Notes.
5. Click the **Log In** button.
The Advisors interface displays.
6. To exit the Advisors interface:
 - a. Click the **Log Out** button. If you have more than one Advisors module open in your browser, clicking the Log out button on any one module ends the session for all open modules. Genesys recommends that you log out of the Advisors modules before closing the browser.
 - b. Click the browser **Close** button.

Procedure: Navigate to Advisors modules

Steps

1. Log in to the Advisors interface.
2. To select an Advisors module, click the  icon and select a module from the dropdown list. Only modules to which you have access permissions are available for selection in the dropdown list.

3. To open another Advisors module without closing the module you are using, right-click a module name in the drop-down list under the  icon and select an option to open the module (open in a new tab or open in a new window).


Important

NEW

Starting in Advisors release 8.5.1, you can open Advisors dashboards in Microsoft Internet Explorer, Google Chrome, or Mozilla Firefox. If you open multiple Advisors sessions simultaneously, ensure you use one type of browser. For example, if you are running Contact Center Advisor in Google Chrome, and you want to open another Contact Center Advisor session or a Workforce Advisor session in another browser tab or window, then that browser must also be Chrome. Similarly, if you want to open multiple Frontline Advisor sessions, you must open all in the same type of browser.

Procedure: Navigate to an accessible dashboard




Steps

1. Log in to the Advisors interface.
2. To open the accessible dashboard, click the  icon and select the accessible dashboard option from the drop-down list.

Procedure: Get Help information for a dashboard

Steps

1. Log in to the Advisors interface.

2. Open this document by clicking the  icon while the Advisors Administration module is the active (selected) module.
3. Open Help information for a specific dashboard by clicking the  icon while the dashboard is selected. For example, to get Help information specific to the Contact Center Advisor (CCAdv) dashboard, ensure the CCAdv dashboard is selected and in view, and then click the  icon on the Advisors interface.


Procedure: Request a new password

Steps

1. On the Advisors login page, click **Forgot your password?**
The ability to request a new password is determined by an installation parameter- this option might be unavailable in your Advisors interface.
2. Enter your user name and e-mail address in the **Forgot password?** window.
3. Click **Submit**.
A new password is sent to your e-mail address.

Procedure: Change a password

Steps

1. Log in to the Advisors interface.
2. Click the  icon on the Advisors interface.

3. Select **Change Password** from the dropdown menu.
The ability to change your password is determined by an installation parameter – this option might be unavailable in your Advisors interface.
If your enterprise uses LDAP, you must use your corporate tools to change your LDAP password.
4. Enter your old password, then your new password.
5. To confirm, re-enter your new password.
6. To save, click **Submit**.
If Advisors rejects your new password, you receive an error message. The error message is generic; it does not indicate the cause of the failure. If Advisors rejects your new password request, update the password and submit the request again. You cannot reuse a password. A space character at the end of a password is not allowed.

Role-Based Access Control for Advisors

Performance Management Advisors support role-based access control (RBAC). You can use RBAC to control which users can access specific components—for example, you can use RBAC to configure access to the Advisors administration module for a specific subset of managers.

Advisors applications use Configuration Server business attributes, which means that the Advisors applications can take advantage of Genesys Roles for controlling access at a detailed level to Advisors' business objects and metrics.

RBAC is enforced primarily by visibility in the interface. What a user sees is determined by the Roles which have been assigned. If the user is not assigned a Role that grants him or her access to a piece of functionality, that functionality is not displayed to that user.

There are three important concepts associated with RBAC:

- **Permissions**
Permissions protect access to a whole object; if you have access permissions, you see the entire object.
- **Roles**
Roles protect properties of an object by hiding or disabling those properties to which you want to restrict access. Roles are intended to work with permissions to more finely control what a user can access.
- **Privileges**
Privileges determine what tasks or functions a user can execute on objects to which he or she has access. You assign privileges to Roles to further refine access to objects and object functionality.

What are RBAC permissions?

Elementary permissions protect access to a whole object. Permissions applied to an object apply equally to all properties of the object - if you have access permissions, you see the entire object.

Object permissions determine which users have access to a certain object or to what objects a given user has access. This is done through the use of access groups or on an individual user basis. Objects include the following:

- Contact Center Advisor and Workforce Advisor
 - Metrics
 - Operating Units
 - Reporting Regions
 - Geographic Regions
 - Contact Centers

- Application Groups
- Frontline Advisor
 - Metrics
 - Levels of the Frontline Advisor hierarchy (that is, the folders and agent groups)

What are RBAC roles?

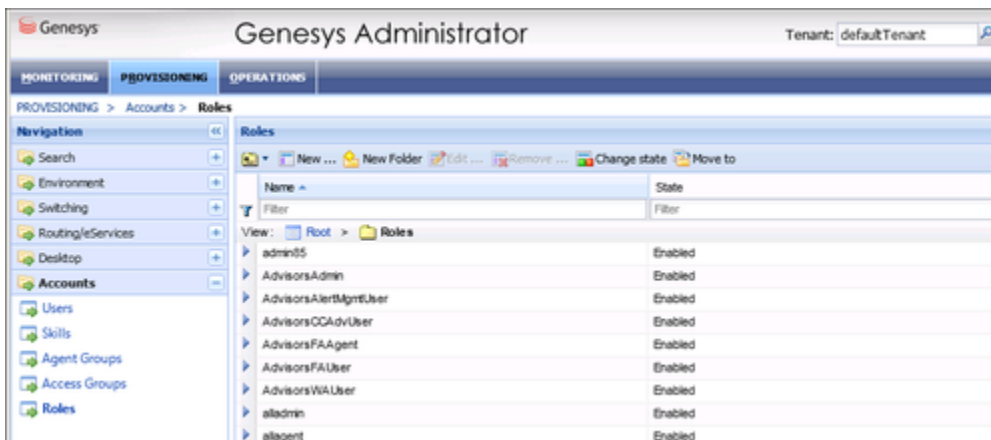
The major component of RBAC is a Role. If it is important in your enterprise to control users' access to information (metrics, hierarchy levels, and business objects), you configure Users and Roles – including the assignment of permissions and privileges to each Role – before any of those users log in for the first time. Each time you have a new user in your enterprise, you assign that person to Roles in a Genesys configuration interface, such as Genesys Administrator.

Roles define what facilities are provided to users to review and manipulate various types of data. These include which property controls are available for items permitted by object permissions, what modules are visible, and access control for entities not represented by configuration objects. A Role is assigned to a User, and that User is then able to do only what that Role permits. One User can be assigned multiple Roles, and one Role can be assigned to multiple Users. A Role may also be assigned to an Access Group, and Users in that Access Group are then able to do what the Role permits.

Different Roles can have different access and allowed functionality for the same objects. In essence, Roles resolve both problems associated with using only permissions – users can access and work with only those parts of the object to which they are allowed.

Roles can also be used to protect access to entities that are not configured as configuration objects, such as logs. In general, when determining the accessibility to an object by a user, the user session cannot retrieve objects if they are not among those objects to which the user has access (as defined by object-access permissions). For data that is available in the session, Role privileges refine what can be done with the data.

Assigning Roles to Users and Access Groups



Roles can be assigned to either Users or Access Groups.

Important

To inherit permissions, Access Groups and Users must belong to the tenant specified during the Advisors Platform installation.

Once a Role is assigned to an Access Group, all Users in the Access Group are assigned that Role. The Access Groups and/or Users must have Read access to the Role to be able to access the Role.

Important

Names of Access Groups must not contain spaces.

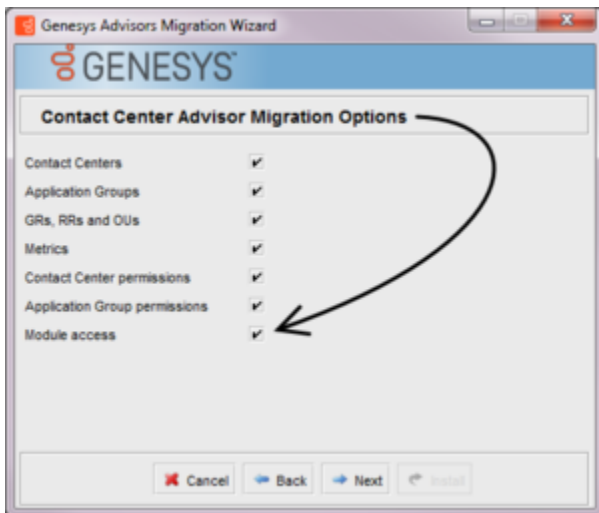
The figure shows an example of Advisors Role configuration.

New Users

By default, new users are not assigned any default Roles. They must be assigned Roles by a system administrator or by an existing user with appropriate permissions.

Default Roles Created by Migration

Module access is determined by the Roles associated with a user's profile. An optional check box on the Advisors migration utility, which is provided in the software distribution package, creates the module access schema. The figure, Migration Wizard, shows the optional **Module access** check box.



Migration Wizard

The utility creates default Roles in the Configuration Server, with each one representing access to a

particular module. Each Role has a limited set of privileges associated with it. The default Roles are:

1. AdvisorsAdmin – allows access to the Advisors administration module for Frontline Advisor, Contact Center Advisor, and Workforce Advisor users, to whom you have assigned that Role.
2. AdvisorsFAUser
3. AdvisorsFAAgent
4. AdvisorsCCAdvUser
5. AdvisorsWAUser
6. AdvisorsAlertMgmtUser

You can change the preceding Role names post-migration.

Further Reading on Roles

Additional sources of information on Role-based access, privileges and permissions are:

- [Genesys Security Deployment Guide](#)
- [Genesys Administrator Extension Deployment Guide](#)
- [Framework Configuration Manager Help](#)
- [Genesys Administrator Extension Help](#)

What are RBAC privileges?

Roles consist of a set of role privileges (Read, Change, Execute, and so on). Privileges determine what tasks or functions a user can execute on objects to which he or she has access. You must define Advisors Role privileges in a Genesys configuration interface, such as Genesys Administrator or GAX.

Tip

While you can use any Genesys configuration interface to import Advisors privileges into a Role, or to assign Role-based permissions to Users or Access Groups for access to the Advisors business attributes, you can view the privileges associated with a Role only in Genesys Configuration Manager.

By default, Role privileges are not assigned to any Role, so you must explicitly assign privileges to Roles. Role privileges range from general to very specific tasks. An authorized user, typically a system administrator, bundles these tasks into Roles. The Roles are then assigned to Users. As a result, each User can perform only those tasks for which they have privileges.

Functionality permissions, or privileges, determine what tasks or functions a user can execute on objects to which he or she has access. If a privilege is present in a Role, then any user who is assigned that Role has access to the functionality controlled by that privilege.

Where do I configure roles, permissions, and privileges?

Roles, and related configuration, are stored in the Genesys Configuration Server.

Typically, you configure RBAC in the following order:

1. Add Roles.
2. Add tasks to Roles.
3. Assign Access Groups to Business Attribute instances.
4. Assign Users to Roles.

Use a Genesys configuration interface, such as Genesys Administrator, to add Users to a Role. Add users with one of the following methods:

- indirectly, as a member of an Access Group
- directly, as a member of a role

You also use a Genesys configuration interface to import Advisors privileges into a Role, or to assign Role-based permissions to Persons or Access Groups.

Tip

A user must have Read access to the Role (either directly or through an Access Group) to which he or she is assigned.

Each Advisors privilege name uses the following general structure:
[application name].[module name].[task grouping].[privilege name]

Ensure you copy the exact privilege with no leading or trailing spaces. Some privileges work as single entries; some require a group of privileges to ensure full access as you expect. For the list of privileges for each Advisors component, see the [CCAdv/WA Access Privileges](#) and [FA Access Privileges](#) pages.

Tip

While you can use any Genesys configuration interface to import Advisors privileges into a Role, or to assign Role-based permissions to Users or Access Groups for access to the Advisors business attributes, you can view the privileges associated with a Role only in Genesys Configuration Manager.

Am I limited to a specific number of users, access groups, or

roles?

There is no limit on:

- the number of Roles that can be present in the Configuration Server
- the number of Access Groups or Users that can be present in the Configuration Server
- the number of Roles supported by Advisors
- the number of Access Groups that are supported by Advisors

Roles, and the privileges associated with Roles, are cumulative. A single User or Access Group can be assigned multiple Roles. In such cases, the user will have the combined set of privileges granted by each Role. In other words, the user is granted any privilege that is granted by at least one of the assigned Roles. This ensures that the user is able to perform the tasks of all Roles in which they participate.

Each user can also belong to multiple Access Groups, with different permissions coming from each group. In such scenarios, the user's permissions are a union of the permissions of all the Access Groups to which he or she belongs, unless access is specifically denied for one group, which takes precedence (see the following scenarios).

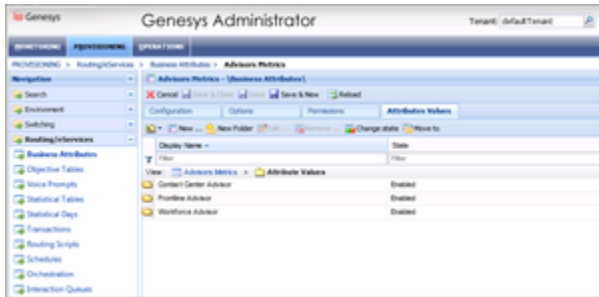
Advisors applications follow the principle of least privilege. The following scenarios show how this union should work:

- User A is part of Access Groups X and Y.
Group X does not have any defined access to a metric.
Group Y has explicit access granted to the metric.
In this case, user A is granted access to the metric.
- User A is part of Access Groups X and Y.
Group X is explicitly denied access to a metric.
Group Y is explicitly given access to the same metric.
In this case, user A is denied access to the metric.
- User A is part of Access Groups X and Y.
Group X is explicitly denied access to a metric.
Group Y does not have any defined access to the same metric.
In this case, user A will be denied access to the metric.
- User A is part of Access Groups X and Y.
Neither group has defined access to the metric.
In this case, user A will be denied access to the metric.

Can I control access to metrics?

Metrics are handled differently than other Advisors business objects. You must add the Advisors metrics in Genesys Configuration Server before you can assign the necessary permissions to Users or Access Groups (you use permissions to control access to metrics (see *What are RBAC permissions?*, above)).

Metrics for Contact Center Advisor, Workforce Advisor, and Frontline Advisor are stored under the Advisors Metrics business attribute; a folder structure segments the metrics for each application and for each object. The following figure shows an example of the folder structure for Advisors metrics. The folder structure shown below is mandatory. The business attributes must be created in the “Default Tenant” chosen during Advisors installation. Click the figure to enlarge it.



Advisors metrics in Genesys Administrator

Each application’s metrics are created under the appropriate folder, and are subdivided by the object types with which they are associated.

To avoid confusion over similarly-named metrics, and because Configuration Server does not allow duplicated names for attribute values, the names of the metrics use a namespace and are case-sensitive. The format of the namespace is:

[Application].[ObjectType].[Channel].[Name]

The values for each characteristic of the namespace are described in the following table:

Namespace characteristic	Definition or values
Application	FrontlineAdvisor, WorkforceAdvisor, or ContactCenterAdvisor
ObjectType	Represents the object type associated with this metric. This could be AgentGroup, Agent, ContactGroup, Application, or Team
Channel	Email, WebChat, Voice, All, or AllNonVoice
Name	The name of the metric

For example, FA metrics would have names like:

- FrontlineAdvisor.Agent.Voice.nch
- FrontlineAdvisor.Team.Voice.taht

CCAdv/WA Access Privileges

The following Tables list all Contact Center Advisor/Workforce Advisor privileges. The Tables include a description of the consequence to the user if the privilege is present or absent.

The Administration module **Users** page is not controlled by an option; all users who can access the Administration module have access to the **Users** page. However, the Users page no longer displays any information about the user accounts, so there is no need to control access to this page. Please refer to the following documents for more information about configuring user profiles:

- [Framework Configuration Manager Help](#)
- [Genesys Administrator Extension Help](#)

Advisors Interface

Privilege	Behavior When Present Behavior When Absent
Advisors.ChangePassword.canView	User sees the Change Password button located at the top of the Advisors interface. Change Password button is hidden.
<div style="display: flex; align-items: flex-start;"> <div style="margin-right: 10px;"> NEW </div> <div> Advisors.RMC.canView </div> </div> <p>NOTE: Replaces AdvisorsAdministration.RMC.canView starting with Advisors release 8.5.101.</p> <p>For detailed information about configuring users to access RMC in Advisors release 8.5.101 and later, including which permissions to assign, see Configuring RMC Users in the Genesys Configuration Layer.</p>	User can access the Resource Management Console (RMC) from the CCAdv dashboard and the WA dashboard. User does not see options to launch the RMC in either the CCAdv dashboard or the WA dashboard.
	When the user opens the RMC window

Privilege	Behavior When Present Behavior When Absent
<p>NEW Advisors.RMC.ManageAgentSkills.canView</p> <p>Introduced in release 8.5.101.</p> <p>For detailed information about configuring users to access RMC in Advisors release 8.5.101 and later, including which permissions to assign, see Configuring RMC Users in the Genesys Configuration Layer.</p>	<p>the user opens the RMC window from either the CCAdv dashboard or from either the CCAdv dashboard or the WA dashboard, there is no Manage Skills pane in the RMC window. the Manage Skills pane displays in the RMC window and is active.</p>
<p>NEW Advisors.RMC.ManageAgentStatus.canView</p> <p>Introduced in release 8.5.101.</p> <p>For detailed information about configuring users to access RMC in Advisors release 8.5.101 and later, including which permissions to assign, see Configuring RMC Users in the Genesys Configuration Layer.</p>	<p>When the user opens the RMC window from either the CCAdv dashboard or the WA dashboard, there is no Manage Status pane in the RMC window. the Manage Status pane displays in the RMC window and</p>

Privilege	Behavior When Present Behavior When Absent
	is active.

Contact Center Advisor

Privilege	Behavior When Present Behavior When Absent
<p>ContactCenterAdvisor.ActionManagementReport.canView</p> <p>Introduced in release 8.1.3.</p> <p>NOTE: The privilege to grant access to the Action Management Report in Contact Center Advisor or Workforce Advisor is related to the Alert Management privilege. That is, if a user has the ContactCenterAdvisor.ActionManagementReport.canView privilege, then that user should also have the privilege to view Alert Management (AlertManagement.canView).</p>	<p>User can access an Action Management Report by double-clicking on an Alert tile. Clicking on the tiles in the Map pane does not launch an Action Management Report, and the Action Management Report arrow for alerts in the Alerts pane is not shown.</p> <p>or by clicking on the arrow for each alert in the Alerts pane.</p>
<p>ContactCenterAdvisor.Dashboard.canView</p>	<p>User can access the CCAdv dashboard. This does not access CCAdv dashboard, and the Contact Center Advisor tab is not shown to the user.</p> <p>a replacement for the module</p>

Privilege	Behavior When Present Behavior When Absent
	access that was previously assigned on a user-by-user basis.
ContactCenterAdvisor.Dashboard.AgentGroupsPane.canView	User can see data in the Agent Groups pane. User sees an empty Agent Groups pane at all times.
ContactCenterAdvisor.Dashboard.ColumnChooser.canView	User has access to the Column chooser button on the dashboard. The Column chooser button is not displayed on the dashboard.
ContactCenterAdvisor.Dashboard.EnterpriseStats.canView	User can see the Enterprise row on the dashboard. The Enterprise row is not sent from the server to the dashboard, which means the user does not see it. statistics on the dashboard.
ContactCenterAdvisor.PerformanceMonitor.canView	User can access Performance Monitor. User does not see the Performance Monitor button on the dashboard.
ContactCenterAdvisor.PerformanceMonitor.CallFlowPane.canView NOTE: If both ContactCenterAdvisor.PerformanceMonitor.CallFlowPane.canView and ContactCenterAdvisor.PerformanceMonitor.CurrentCapacity.canView are excluded from a	User can see the Call Flow pane, but no metrics or values are displayed. The

Privilege	Behavior When Present Behavior When Absent
<p>user's role, then the left side of the Performance Monitor window is not displayed to the user.</p>	<p>Call Flow pane and metrics in the Performance Monitor window.</p>
<p>ContactCenterAdvisor.PerformanceMonitor.CurrentCapacity.canView</p> <p>NOTE: If both ContactCenterAdvisor.PerformanceMonitor.CallFlowPane.canView and ContactCenterAdvisor.PerformanceMonitor.CurrentCapacity.canView are excluded from a user's role, then the left side of the Performance Monitor window is not displayed to the user.</p>	<p>User can see the Current Capacity pane. The Current Capacity pane is shown, but no metrics or values are displayed. metrics in the Performance Monitor window.</p>
<p>ContactCenterAdvisor.Dashboard.PivotSelect.canView</p>	<p>User has access to the pivot drop-down list. Pivot drop-down list is not shown in the top left pane. allows them to switch views of the pivot table.</p>
<p>ContactCenterAdvisor.AlertManagement.canView</p> <p>NOTE: In release 8.1.3, this privilege was replaced with Alert Management-specific privileges.</p>	<p>User has access to the Alert Management tab. The Alert Management tab is not shown; clicking on the tiles in the map does not launch the Action Management Report; and the Action Management Report arrow for alerts in the Alerts pane is not shown.</p>

Privilege	Behavior When Present Behavior When Absent
	the Action Management Report page. User can access the Action Management Report either by clicking on the Alert Management tab, by double-clicking on the alert tiles in the map, or by clicking on the arrow for each alert in the Alerts pane.

Workforce Advisor

Privilege	Behavior When Present Behavior When Absent
WorkforceAdvisor.ActionManagementReport.canView This privilege is applicable to Release 8.1.3 and later. In a migration scenario, this privilege is not defined in any existing Advisors role in the Configuration Server settings. An	Clicking on the tiles in the Map pane does not launch an Action Management Report page, and the Action Management Report arrow for alerts

Privilege	Behavior When Present Behavior When Absent
<p>administrative user must update existing roles, or create new roles, and add the privilege to allow the described access or activity.</p>	<p>Action Management Report page by double-clicking on an Alert tile in the Map does not display in the Alerts pane, or by clicking on the arrow for each alert in the Alerts pane.</p>
<p>WorkforceAdvisor.Dashboard.AgentGroupsPane.canView Introduced in release 8.1.3.</p>	<p>User can see User always sees an empty Agent Groups pane with a message stating the lack of access to the Agent Groups pane.</p>
<p>WorkforceAdvisor.Dashboard.canView</p>	<p>User can access the WA dashboard. User cannot access WA dashboard, and the Workforce Advisor tab is not shown to the user.</p>
<p>WorkforceAdvisor.Dashboard.ColumnChooser.canView Introduced in release 8.1.3.</p>	<p>User has access to the Column Chooser button on The Column Chooser button is not displayed on the dashboard.</p>

Privilege	Behavior When Present Behavior When Absent
<p>WorkforceAdvisor.Dashboard.EnterpriseStats.canView</p> <p>Introduced in release 8.1.3.</p>	<p>the dashboard.</p> <p>User can see the Enterprise row in the pivot table (Contact Centers pane).</p>
<p>WorkforceAdvisor.Dashboard.PivotSelect.canView</p> <p>NOTE: Because there are additional hierarchies in WA specifically to display agent group contact centers, users must have permission to access the hierarchy grouping (WorkforceAdvisor.Dashboard.PivotSelect.canView) if agent group contact centers are configured.</p> <p>Introduced in release 8.1.3.</p>	<p>User has access to the hierarchy drop-down list on the Contact Centers pane.</p> <p>The hierarchy drop-down list does not display on the Contact Centers pane.</p>

Alert Management

Privilege	Behavior When Present Behavior When Absent
<p>AlertManagement.canView</p> <p>Introduced in release 8.1.3.</p>	<p>User has access to the Alert Management tab.</p> <p>The Alert Management tab does not display for the user.</p>
<p>AlertManagement.ActionManagementReport.canView</p> <p>Introduced in release 8.1.3.</p>	<p>User can create and delete reports.</p> <p>The New and Delete buttons are not displayed in the Action Management Report pane, and the Edit/Delete column is not shown.</p>

Privilege	Behavior When Present Behavior When Absent
	and update or delete an existing report.

Administration Module

Privilege	Behavior When Present Behavior When Absent
AdvisorsAdministration.canView	User has access to the Administration module. User cannot access the Administration Module, and the module tab is not shown to the user.
AdvisorsAdministration.SystemConfiguration.canView	User can access System Configuration page. System Configuration option is not shown on the Administration menu.
AdvisorsAdministration.Regions.canView	User can access the Regions page. Regions option is not shown on the Administration menu.
AdvisorsAdministration.ApplicationGroups.canView	User can access Application Groups/Thresholds page. Application Groups/Thresholds option is not shown on the Administration menu.

Privilege	Behavior When Present Behavior When Absent
	page; option shown on menu.
AdvisorsAdministration.ContactCenters.canView	User can access the Contact Centers option is not shown on the Administration menu. page; option shown on menu.
AdvisorsAdministration.ApplicationConfiguration.canView	User can access the Application Configuration option is not shown on the Administration menu. page; option shown on menu.
AdvisorsAdministration.AgentGroupConfiguration.canView	User can access the Agent Group Configuration option is not shown on the Administration menu. page; option shown on menu.
AdvisorsAdministration.ContactGroupConfiguration.canView	User can access the Contact Group Configuration option is not shown on the Administration menu. page; option shown on menu.

Privilege	Behavior When Present Behavior When Absent
AdvisorsAdministration.Metrics.canView	User can access the Report Metrics option is not shown on the Administration menu.
AdvisorsAdministration.MMW.canCreate Introduced in release 8.1.3.	User can create metrics. The Create function and the Copy function do not display in the Metric Manager.
AdvisorsAdministration.MMW.canEdit Introduced in release 8.1.3.	Grants privilege to edit metrics. The Edit function does not display in the Report Metrics Manager.
AdvisorsAdministration.MMW.canDelete Introduced in release 8.1.3.	Grants privilege to delete custom metrics. The Delete function does not display in the Report Metrics Manager.
AdvisorsAdministration.MMW.SourceMetrics.canView	Grants privilege to view source metrics. The Source Metrics page, and the link to it in the Administration module, do not display.
AdvisorsAdministration.MMW.SourceMetrics.canCreate	Grants privilege to create source metrics. The Create Source Metrics button does not display on the Source Metrics page.
AdvisorsAdministration.MMW.SourceMetrics.canEdit	Grants privilege to edit source metrics. The Edit function does not display on the Source Metrics page.
AdvisorsAdministration.MMW.SourceMetrics.canDelete	Grants privilege to delete source metrics. The Delete function does not display on

Privilege	Behavior When Present Behavior When Absent
	privilege to delete the Source Metrics page. custom source metrics.
AdvisorsAdministration.DistributionLists.canView	User can access the Distribution Lists option is not shown on the Administration menu. Lists page; option shown on menu.
AdvisorsAdministration.ManualAlerts.canView	User can access the Manual Alerts option is not shown on the Administration menu. Alerts page; option shown on menu.
AdvisorsAdministration.AlertManagement.AlertCauses.canView	User can access the Alert Causes option is not shown on the Administration menu. Causes page; option shown on menu.
AdvisorsAdministration.AlertManagement.KeyActions.canView	User can access the Key Actions option is not shown on the Administration menu. Actions page; option shown on menu.
AdvisorsAdministration.GenesysAdapter.Configuration.canView	User Genesys Adapter section (which

Privilege	Behavior When Present Behavior When Absent
	<p>can access the Genesys Adapter Objects Configuration page; option shown on menu.</p> <p>includes the Object Configuration and Manage Adapters options) is not shown on the Administration menu.</p>
<p>AdvisorsAdministration.RMC.canView</p> <p>NOTE: The AdvisorsAdministration.RMC.canView privilege is discontinued starting with Advisors release 8.5.101; Advisors.RMC.canView and AdvisorsAdministration.RMC.Notifications.canView replace it.</p> <p>If your existing Advisors installation includes AdvisorsAdministration.RMC.canView, and you migrate to Advisors release 8.5.101 or higher, the AdvisorsAdministration.RMC.canView privilege remains in your installation, but Advisors ignores it. You must add the Advisors.RMC.canView privilege to provide user access to the RMC and the AdvisorsAdministration.RMC.Notifications.canView privilege to maintain the role-based access control of RMC notification lists and templates in the Administration module.</p>	<p>User can access the Resource Management-related pages in the Administration module, Control Panel section (which includes the Notification Lists and Notification Templates options) is not shown on the Administration module menu.</p> <p>both options are shown on the Administration module menu.</p>
<p>NEW AdvisorsAdministration.RMC.Notifications.canView</p> <p>NOTE: Replaces AdvisorsAdministration.RMC.canView starting with Advisors release 8.5.101.</p>	<p>The Control Panel section does not appear in the Administration module's navigation pane and there are no links to the following pages:</p> <ul style="list-style-type: none"> • Notification Templates • Notification Lists <p>the user can create a template in the Resource Management window and use it once; there is no option to save a new template for reuse.</p>

Privilege	Behavior When Present Behavior When Absent
	<ul style="list-style-type: none"> • Notification Templates • Notification Lists <p>User can create a new notification template in the Resource Management window and use it once, or save the template to use it again.</p>
AdvisorsAdministration.PeripheralGateways.canView	<p>User can access the Switches/Peripherals option is not shown on the Administration menu. Switches/Peripherals page.</p>
AdvisorsAdministration.DeletedObjects.canView	<p>User can see the deleted objects Deleted objects in Genesys Administrator are shown in the corresponding Administration page. server in the corresponding Administration pages.</p>

Configuring RMC Users in the Genesys Configuration Layer (8.5.101 Only)

With the appropriate configuration, any Advisors user in release 8.5.101 and later can use the Resource Management Console (RMC). You configure a user's access to RMC in the Configuration Layer.

Warning

For a known issue with multi-user use of RMC when you use Supervisor Desktop Service (SDS) release 7.6.300.09 and the RMC that shipped with Advisors Genesys Adapter release 8.5.101.08, see the [Performance Management Advisors Genesys Adapter Release Note](#).

When configuring RMC users, consider the following:

- In RMC, users see only agents and agent groups to which they have been granted at least Read permission in the Genesys Configuration Layer.
- You can control what each user can do in RMC. For example, certain users might be able to change agents' skills in RMC, while other users cannot. See [Advisors.RMC.ManageAgentSkills.canView](#) and [Advisors.RMC.ManageAgentStatus.canView](#) for specific information.

Genesys recommends the following configuration when you assign RMC access permissions to a user:

1. Create an access group; for example, RMC Users Access Group.
2. Assign the permissions to the access group.
3. Add the users as members to the access group.

The following procedure assumes you are using an access group of users who will have access to RMC on the Contact Center Advisor and/or Workforce Advisor dashboard.

See the following Help documents for detailed information about using the Genesys configuration interface available in your enterprise:

- [Configuration Manager Help \(8.1\)](#)
- [Genesys Administrator Help](#)
- [Genesys Administrator Extension Help](#)


Procedure: Assigning User Permissions for RMC Access

Purpose: To configure User and Access Group objects in your enterprise to allow access to the RMC.

Prerequisites

- You have created an access group to contain users who will have access to RMC. (You will add users to this access group as part of the following procedure.)
- You are logged in to the interface you use to configure Genesys applications (Configuration Manager, Genesys Administrator, or Genesys Administrator Extension).

Steps

1. In the Genesys configuration interface, create a new person in your SDS-monitored tenant for each user who needs access to RMC. This can be the Environment tenant, or another tenant. For each person, do the following:
 - a. If you use SDS release 7.6.300.09 or earlier in your environment, ensure that the **Agent** check box is selected (that is, identify this user as an agent).  Selecting the **Agent** check box is no longer required starting with SDS release 7.6.300.11.
 - b. In the **Annex**, create a new section named **[security]**.
 - c. Add the following properties to the section:
 - Supervisor = 1
 - SupervisorAdhoc = 2
 - SupervisorExtended = 10
 - SupervisorMonitoring = 1
 - d. Save the person.
2. Navigate to the access group that you created to collect the RMC users and make the following updates:
 - a. Add the default user to the list in the **Permissions** and give that user Full Control as the type of access (if this does not already exist).
 - b. Save the access group.
3. Change the permissions of the following objects, as described below, to grant additional permissions to the access group:
 - Read on the Environment tenant object. No propagation of this permission to contained objects is required.
 - Read and Execute on the application named default in the Environment tenant. Read on any user-created folder that contains the application.

- Read and Execute on the application object for the SDS application, in the Environment tenant. Read on any user-created folder that contains the application.
- In a multi-tenant deployment, Read on the tenant object that contains the RMC user. No propagation of this permission to contained objects is required.
- In the tenant that contains the RMC user, Read on agent groups that the user will work with in RMC. Read on any user-created folder that contains the agent groups.
- In the tenant that contains the RMC user, Read and Change on users (persons) that the user will work with in RMC, **NEW** although starting with CCAdv/WA release 8.5.101.15, it is sufficient to apply the Read permission only (the Change permission is not required). Read on any user-created folder that contains the users (persons).
- Read on skills that the RMC user will manage for users (persons). Read on any user-created folder that contains the skills.

4. Restart the SDS server. If there are hundreds of agents, the SDS server can take some time to completely start.

If you use SDS release 7.6.300.09 or earlier, wait until you see the following messages in the SDS server logs before proceeding:

```

22 09 15:18:34:472 [ Stat Initializer] INFO      GSD.Stat Service  Stat on
request is set to true
22 09 15:18:43:691 [ StatQueue] INFO      GSD.Stat DIM  Stat
initialization complete (Super queue)
22 09 15:18:43:691 [ StatQueue] INFO      GSD.Stat DIM  Stat
initialization complete (Priority queue)
22 09 15:25:54:582 [ StatQueue] INFO      GSD.Stat DIM  Stat
initialization complete
22 09 15:37:53:551 [ http-8080-1] OFF      SDS
+++++
Supervisor Desktop Service: 7.6.300.09
    
```

NEW If you use SDS release 7.6.300.11 or higher, it is not necessary to wait for the Stat initialization complete message in the logs. Instead, watch for the following message in the SDS server logs, which indicates that SDS is ready (that is, all the configuration objects are loaded):

```

01 04 17:30:36:828 [ Init Ail Logic] OFF  SD.Directory Manager  Supervisor
Desktop Initialized:
+++++
Supervisor Desktop Initialized.
    
```

5. Restart the Geronimo application server in which RMC is running.

Warning

When you add users, change users, or remove users in the Configuration Layer, the SDS server should pick up these changes and they should be reflected in the RMC without further action. If such changes are *not* visible in the RMC, restart the SDS server after you are done working with the users, and then restart the Advisors Geronimo server on the node that is running

the RMC. This will ensure that SDS and Advisors modules use your changes.

6. See **Next Steps** for information about assigning Advisors permissions to the new user.

Next Steps

In addition to the permissions that you assign to the user in the Configuration Layer, the user needs additional permissions assigned as options in the **Annex** of a role. Review the following Advisors permissions for additional information:

- [Advisors.RMC.canView](#)
- [Advisors.RMC.ManageAgentSkills.canView](#)
- [Advisors.RMC.ManageAgentStatus.canView](#)

Configuration Modes

You can choose between two Contact Center Advisor/Workforce Advisor configuration modes:

- Integrated CCAAdv/WA configuration mode
- Independent CCAAdv/WA configuration mode

The default mode is integrated configuration mode.

The choice of the mode determines all further configuration processes, what data is stored, and how the configuration data is interpreted and used inside the application.

You can select the mode at any time on the [System Configuration](#) page (Integrated CCAAdv/WA configuration = Yes or No). A change to the parameter has an immediate impact on the application. Both manual and bulk configuration options consider the configuration mode. For more information on bulk configuration, see [Genesys Performance Management Advisors Deployment Guide](#).

Agent Groups		Test : IT-Test	
Name	Agent Group Contact Center		A
Emergency	WA AGCC12 2		0
Premier	WA AGCC12 3		1
PremierSales	WA AGCC12 2		2
DSM1 IVR	WA AGCC12 2		2
BConsumer			2
Jordan	WA AGCC12 3, WA AGCC12		140

Multiple AGCC to AG mapping

With the introduction of the configuration modes, you can map an agent group to multiple agent group contact centers (AGCC) that are under the same network contact center (NCC).

In this topic, the following terminology is used:

- *Configured application* is an application mapped to a contact center, an application group, a region, and/or an operating unit.
- *Configured contact group* is a contact group mapped to a contact center, an application group, a region, and/or an operating unit.

<tabber>

Integrated CCAAdv/WA Configuration Mode=

Earlier releases of the Advisors application included integrated, or dependent, configuration between Contact Center Advisor and Workforce Advisor. Starting in release 8.1.5, to select integrated mode for CCAAdv/WA, set the Integrated CCAAdv/WA configuration parameter to Yes. The integrated configuration mode makes WA dependent on the CCAAdv configuration structure.

After switching to integrated mode, the application applies the following rules automatically:

- 1.

CCAdv applications mapped to WA contact groups contribute to contact group metrics only if they are included in the CCAdv rollup and these applications are mapped to the same aggregation objects as the associated contact groups (that is, contact centers, application groups, reporting regions, and operating units).

2. An agent group assigned to an application is automatically included (enabled) in the CCAdv rollup when you assign this agent group to an application mapped to a contact center and an application group.
3. Agent group-to-application relationships are automatically propagated to contact groups associated with these applications if the applications have properties described in 1 above.
4. An agent group assigned to an agent group contact center (AGCC) is automatically included (enabled) in the CCAdv rollup - under the network contact center (NCC) associated with that AGCC - when you assign this agent group to an application mapped to the NCC and the `Include in CCAdv Rollup` property for this agent group is set to Yes. If mapped to a contact group, such an agent group contributes to the related contact group metrics and becomes visible on the dashboard only when it is mapped to an application that has properties described in 1 above.

If you map at least one contact group to a contact center, application group, and region (or operating unit), the dashboard view is generated and the forecast metrics display.

In the integrated mode, only configured applications mapped to the same contact center, application group, and regions appear as available for mapping to a contact group.

There are two new agent group properties:

- `Include in CCAdv`
- `Include in WA`

Both `Include in CCAdv` and `Include in WA` properties have a default setting of Yes in integrated mode. In the integrated mode, setting `Include in WA` to Yes makes an agent group - agent group G, for example - available for mapping to a contact group - contact group C, for example - when:

- C is mapped to the same AGCC as G.
- There is a parent contact group - P - mapped to a configured application where the application is associated with the agent group G and where P is mapped to the parent NCC and the same application group and regions as C.

[] Independent CCAdv/WA Configuration Mode=

To select the independent CCAdv/WA configuration mode, set the `Integrated CCAdv/WA` configuration parameter to No. In this configuration mode, WA operates independently from the CCAdv configuration structure.

After switching to independent mode, the application applies the following rules automatically:

1. All applications that are published, and not yet mapped to other contact groups, can be mapped to configured WA contact groups. Once mapped to configured contact groups, the applications contribute to real-time metrics for the contact groups. Contact groups that are not mapped to applications do not have real-time metric data; for example, Actual AHT, Actual SL%, and so on.
2. You can manually assign any agent group to a configured WA contact group mapped to a network contact center (NCC).
3. Any agent group that is assigned to an agent group contact center (AGCC), and that has the `Include in WA Rollup` property set to Yes, can be mapped to configured WA contact groups that are also

assigned to that AGCC.

4. An agent group can be mapped to multiple configured WA contact groups.
5. You can edit the `Include in CCAdv` and `Include in WA agent group rollup` properties. Agent groups appear on the CCAdv and WA dashboard views only if the corresponding `Include in Rollup` parameter is set to Yes.

The `Include in CCAdv` and `Include in WA agent group rollup` properties control AGCC visibility in the independent CCAdv/WA configuration mode. The properties are applicable only to agent groups mapped to an AGCC.

When you set the `Include in CCAdv rollup` property to Y for an agent group, and that agent group is mapped to an AGCC, then the agent group and the AGCC are automatically enabled for CCAdv when you map the agent group to a configured application(s) that belongs to the associated NCC parent.

Changing the `Include in CCAdv rollup` value from N to Y automatically enables all AGCCs - and agent groups under this AGCC - if the agent groups are already mapped to a configured application(s) that belongs to the associated NCC parent.

If the `Include in CCAdv rollup` property is set to N for an agent group, that agent group does not appear in CCAdv configuration. An AGCC does not appear in CCAdv configuration if none of the agent groups mapped to it have the `Include in CCAdv rollup` property set to Y. If you do not want an AGCC used for WA to be visible on the CCAdv dashboard, then ensure you set the `Include in CCAdv rollup` property to N for all agent groups assigned to the AGCC.

WA Configuration Examples for Integrated Configuration Mode

In integrated configuration mode, Workforce Advisor (WA) configuration depends on Contact Center Advisor (CCAdv) configuration. The availability of applications in the WA contact group configuration interface depends on the selected aggregated objects and the application configuration in CCAdv. Agent group and contact group associations are derived automatically from the CCAdv configuration of applications associated with the contact groups and cannot be changed in WA. CCAdv and WA operate with the same set of aggregated objects, applications, agent groups, and the associations amongst them. You cannot configure WA without first configuring CCAdv.

Related Information

For information about business objects (reporting regions, geographic regions, operating units, contact centers and application groups), see [Advisors Business Objects](#).

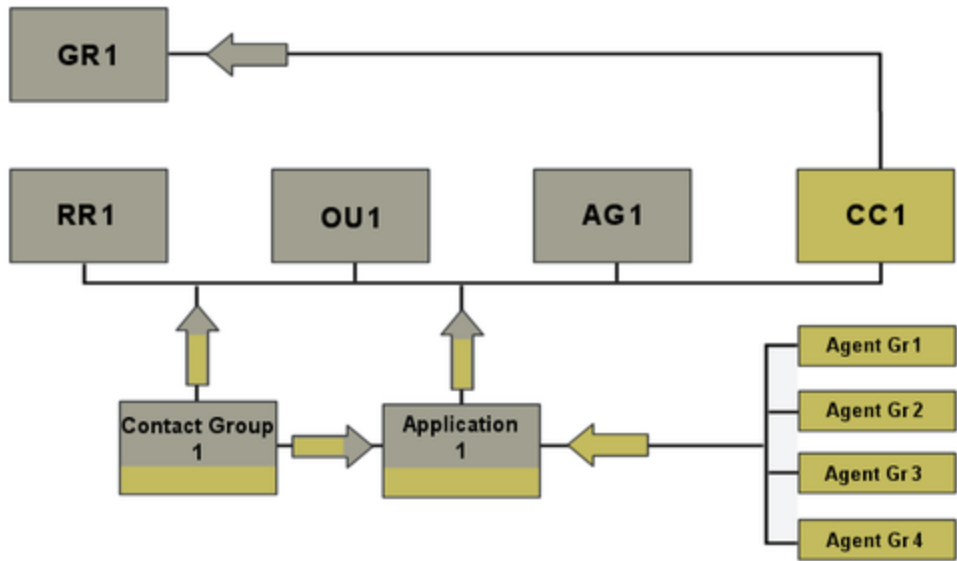
For additional information about agent groups and contact groups, see:

- [Agent Group Configuration](#)
- [Contact Group Configuration](#)

For information about configuring contact centers (site or network), see [Contact Centers](#) and [Configuring Contact Centers](#).

Correct Configuration: Simple Configuration In Integrated Configuration Mode

To correctly configure the deployment shown in the following Figure, see [Configuring CCAdv/WA using the Integrated Configuration Mode: Basic Configuration](#).



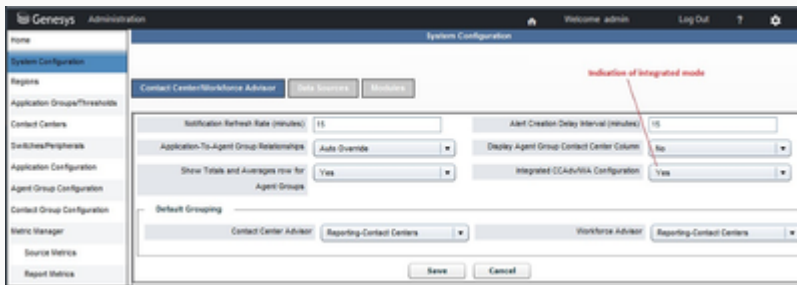
Legend:

- AG = Application Group
- Agent Gr = Agent Group
- CC = Contact Center
- GR = Geographic Region
- OU = Operating Unit
- RR = Reporting Region

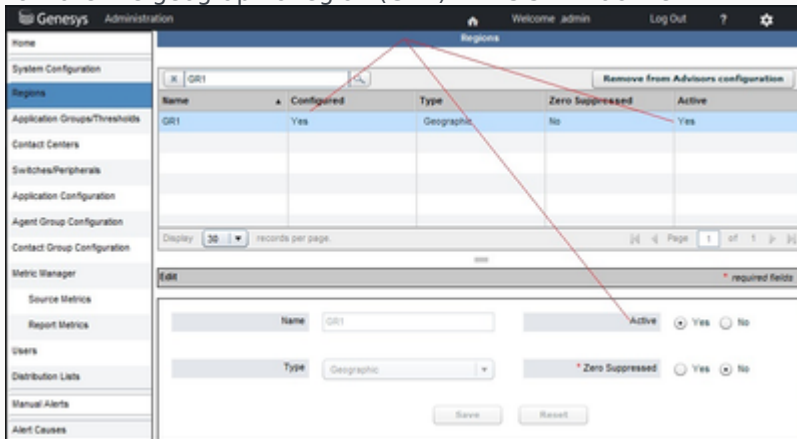
Procedure: Configuring CCAdv/WA using the Integrated Configuration Mode: Basic Configuration

Steps

1. Verify that Contact Center Advisor/Workforce Advisor is set to Integrated configuration mode.

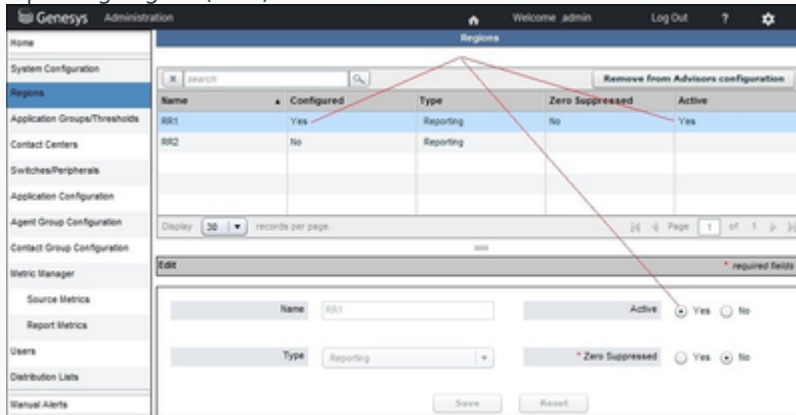


2. Activate the geographic region (GR1) if it is still inactive.

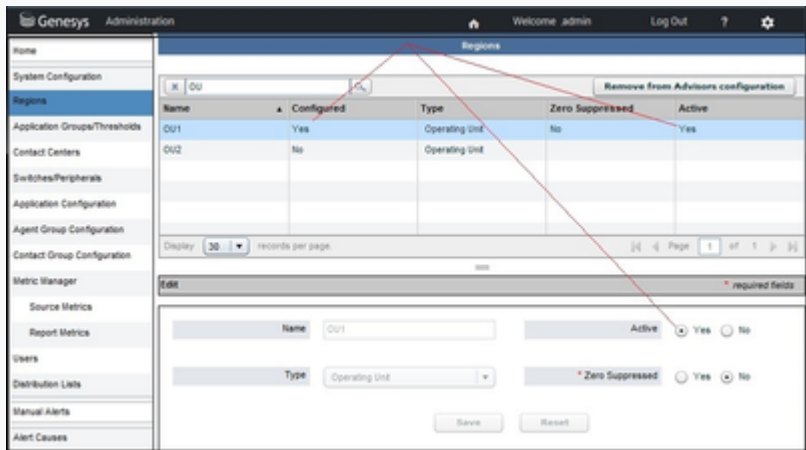


3. Make sure that any of the following objects that will participate in the configuration are active:

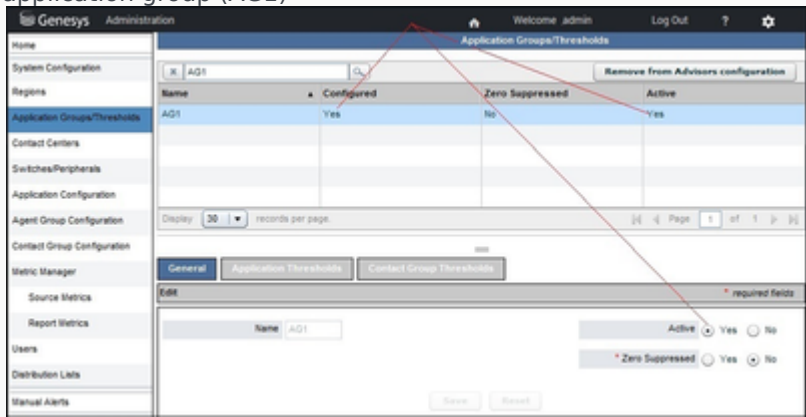
- reporting region (RR1)



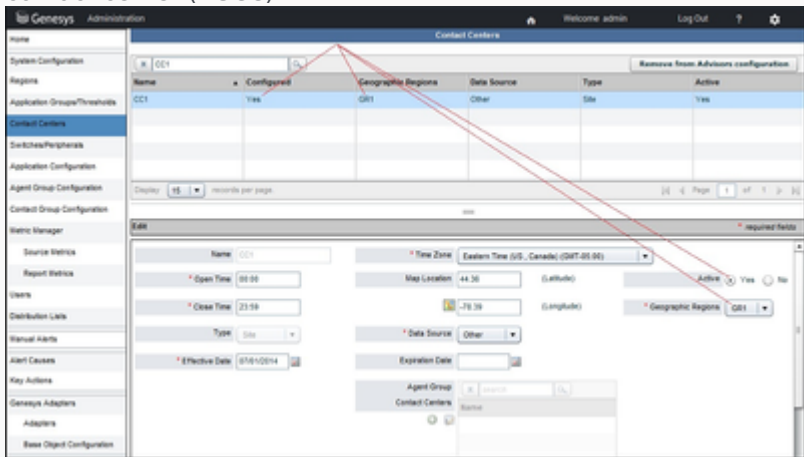
- operating unit (OU1)



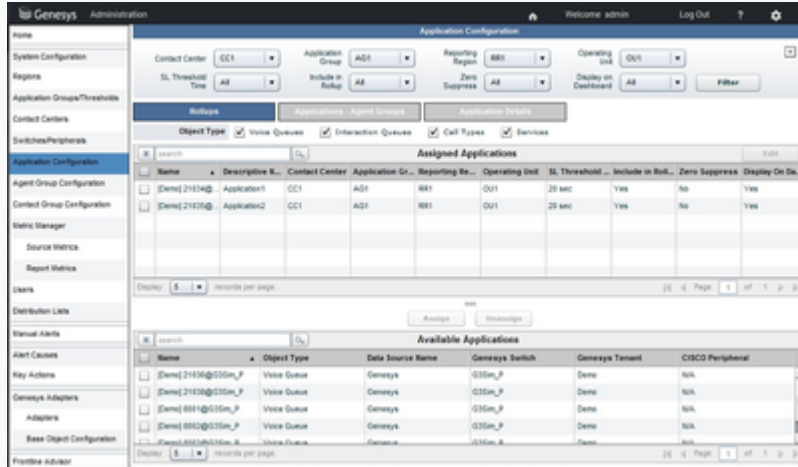
- application group (AG1)



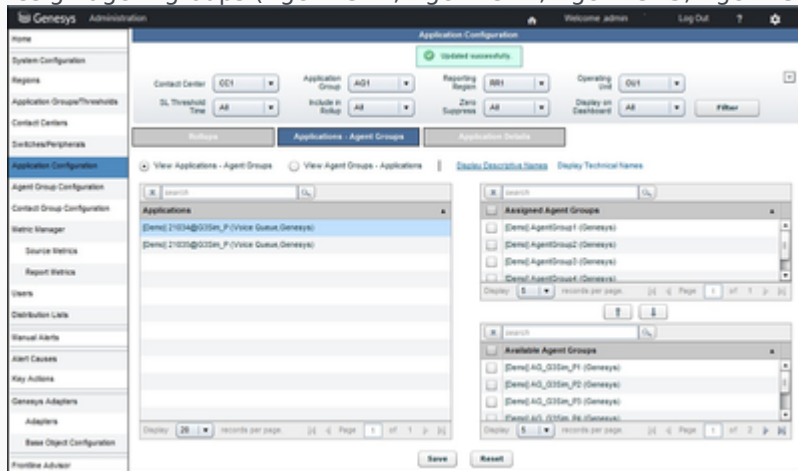
4. Configure a contact center (CC1), if it is not already configured, and associate it with a geographic region (GR1). The contact center (CC1) can be of any type except agent group contact center (AGCC).



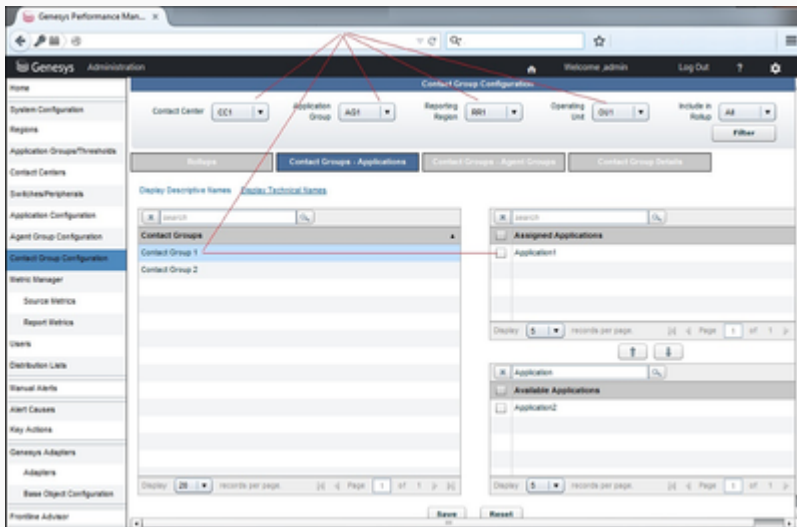
- Assign the application (Application 1, and any other applicable application) to CC1, RR1, OU1, and AG1.



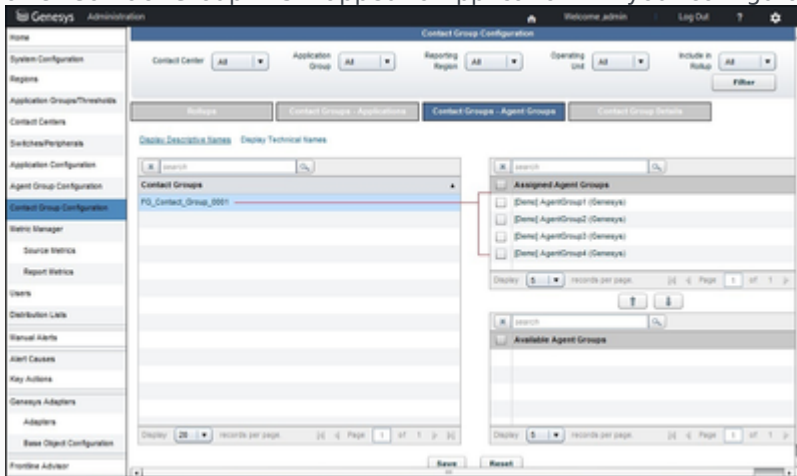
- Assign agent groups (Agent Gr 1, Agent Gr 2, Agent Gr 3, Agent Gr 4, and so on) to Application 1.



- Choose a contact group (Contact Group 1) that, in the system, is associated with Application 1. Associate Contact Group 1 with the same contact center (CC1), same reporting region (RR1), same operating unit (OU1), and the same application group (AG1) with which Application 1 is associated.

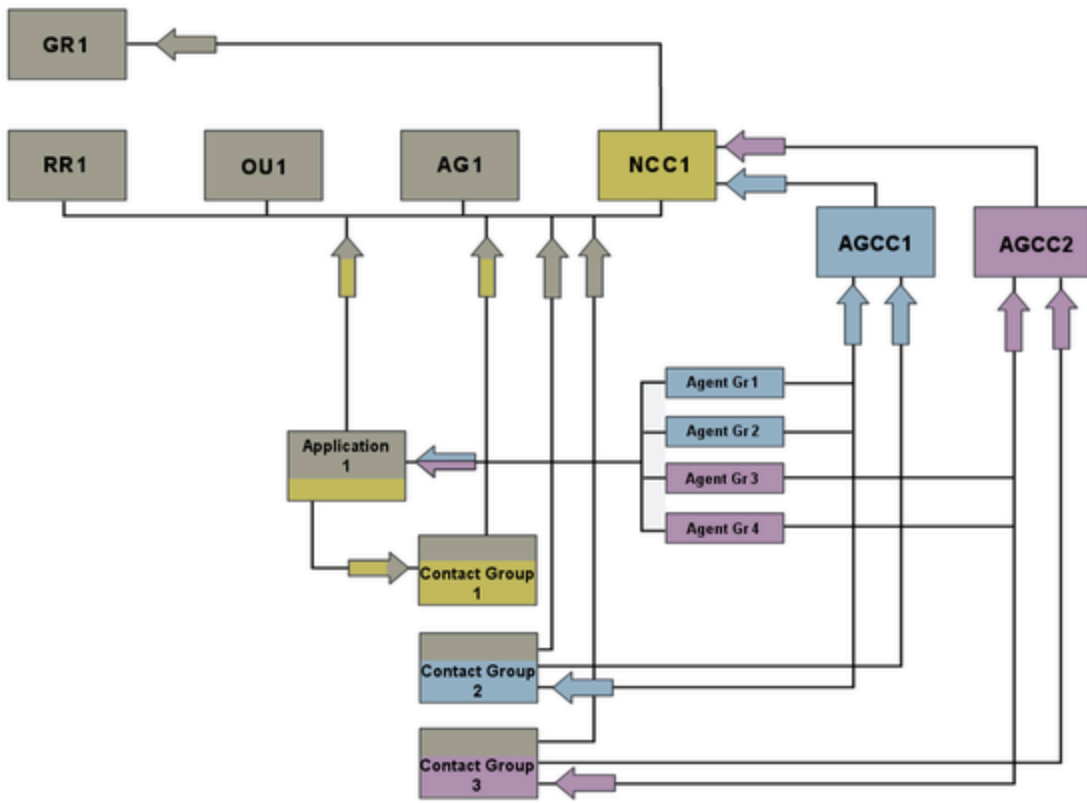


- 8. Verify in the Administration module that Agent Gr 1, Agent Gr 2, Agent Gr 3, and Agent Gr 4 are associated with Contact Group 1. The association between each relevant agent group and the contact group occurs automatically after Contact Group 1 is mapped to Application 1 if your configuration is valid.



Correct Configuration: Configuration With Agent Groups Divided Into Agent Group Contact Centers

To correctly configure the deployment shown in the following Figure, see [Configuring CCAdv/WA using the Integrated Configuration Mode: Agent Groups Divided Into Agent Group Contact Centers](#).



Legend:

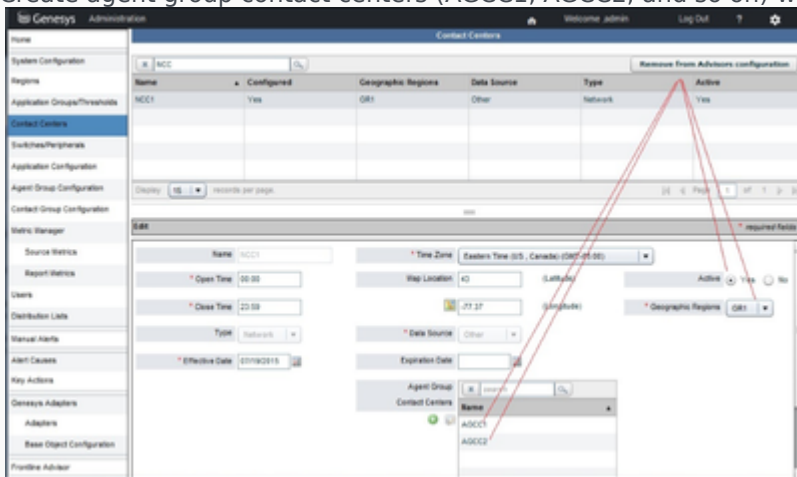
- AG = Application Group
- AGCC = Agent Group Contact Center
- Agent Gr = Agent Group
- GR = Geographic Region
- NCC = Network Contact Center
- OU = Operating Unit
- RR = Reporting Region

Procedure: Configuring CCAdv/WA using the Integrated Configuration Mode: Agent Groups Divided Into Agent Group

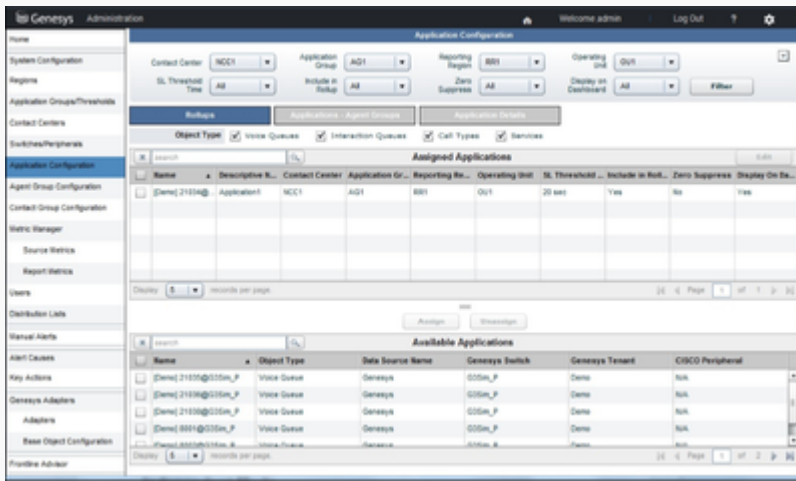
Contact Centers

Steps

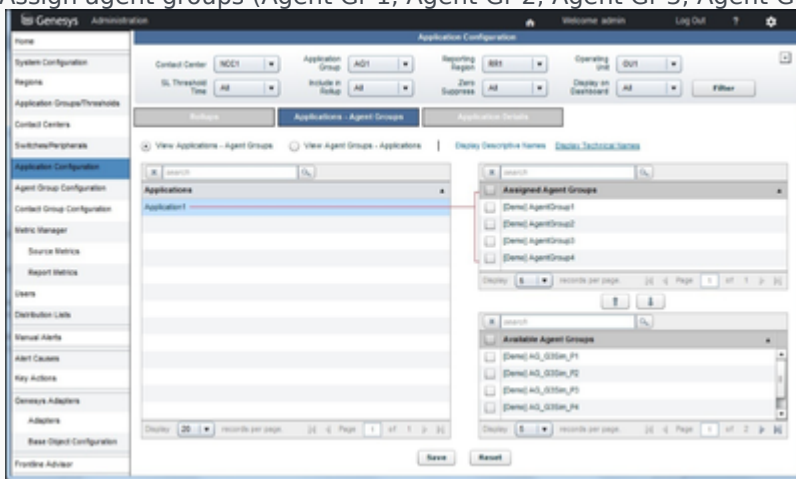
1. Activate the geographic region if it is still inactive (GR1).
2. Make sure that any of the following objects that will participate in the configuration are active:
 - reporting region (RR1)
 - operating unit (OU1)
 - application group (AG1)
3. Configure a network contact center (NCC1), if it is not already configured, and associate it with a geographic region (GR1).
4. Create agent group contact centers (AGCC1, AGCC2, and so on) within NCC1.



5. Assign the application (Application 1, and any other applicable application) to NCC1, RR1, OU1, AG1.



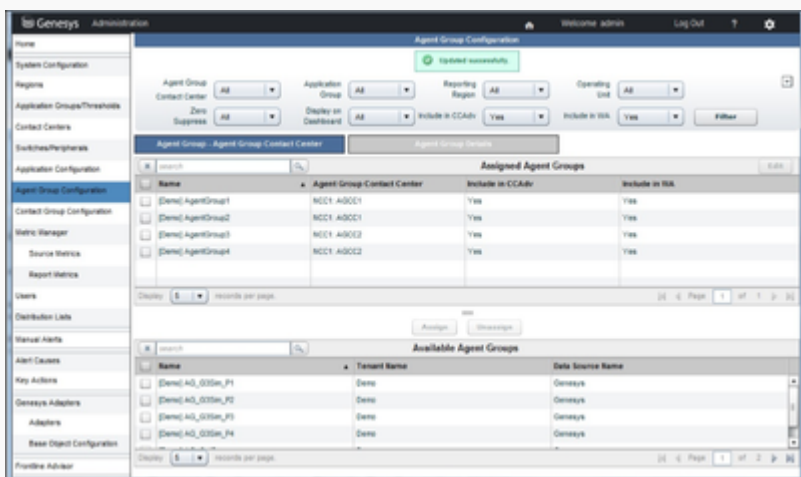
6. Assign agent groups (Agent Gr 1, Agent Gr 2, Agent Gr 3, Agent Gr 4, and so on) to Application 1.



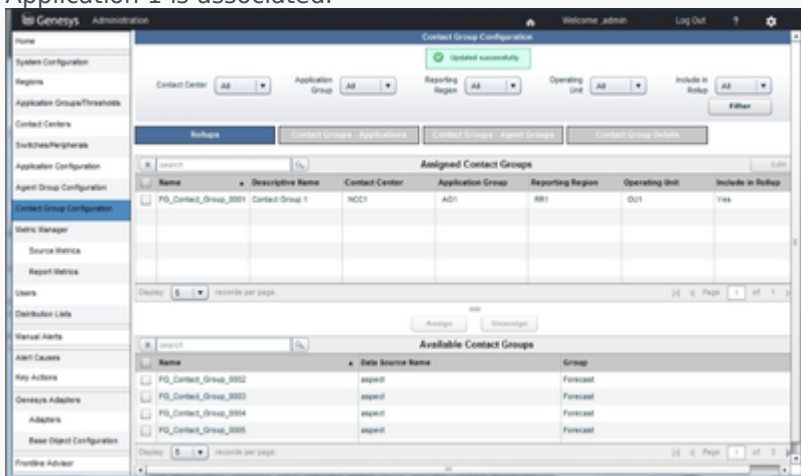
7. Assign agent groups to AGCCs:

- a. Assign Agent Gr 1 and Agent Gr 2 to AGCC1.
- b. Assign Agent Gr 3 and Agent Gr 4 to AGCC2.

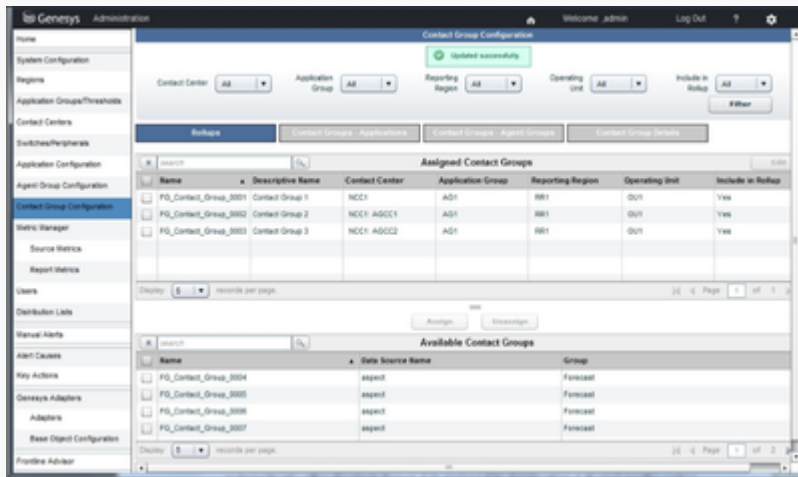
Agent Gr 1, Agent Gr 2, Agent Gr 3, Agent Gr 4, and so on, will be included automatically in both CCAdv and WA.



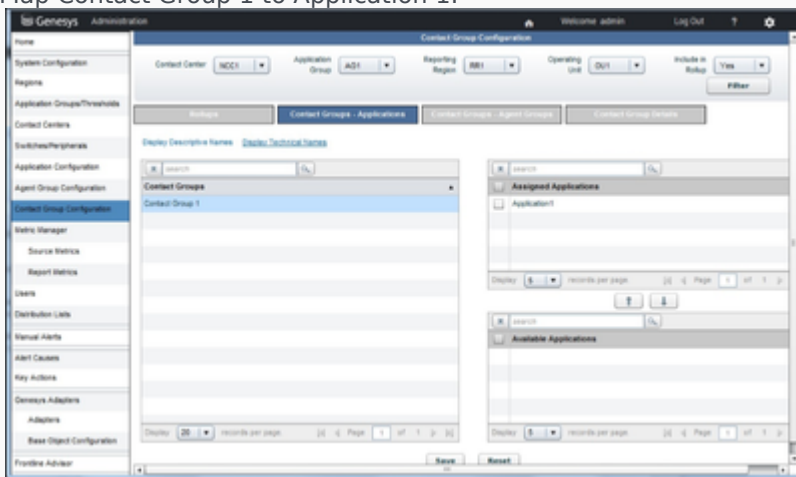
8. Choose a contact group (Contact Group 1) that, in the system, is associated with Application 1. Associate Contact Group 1 with the same network contact center (NCC1), the same reporting region (RR1), the same operating unit (OU1), and the same application group (AG1) with which Application 1 is associated.



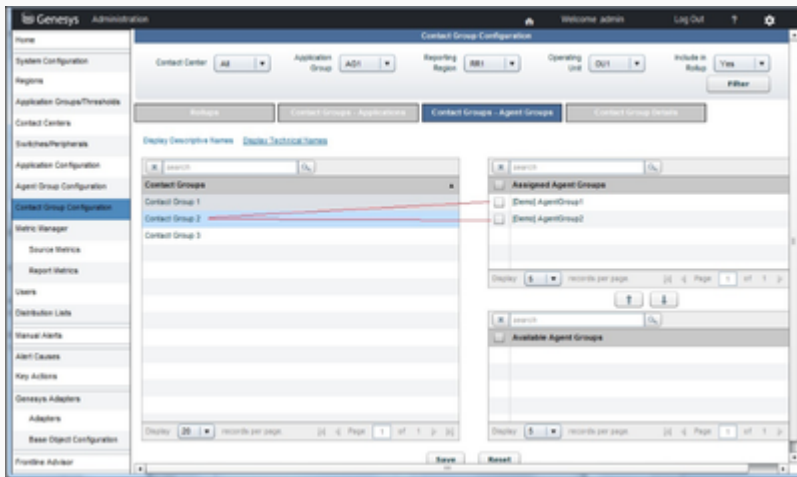
9. Map contact groups that are associated with agent groups already assigned to AGCCs:
 - a. Choose a contact group (Contact Group 2) that, in the system, is associated with the set of agent groups from AGCC1. Map Contact Group 2 to AGCC1 and to the same reporting region (RR1), the same operating unit (OU1), and the same application group (AG1) with which Contact Group 1 is associated.
 - b. Choose a contact group (Contact Group 3) that, in the system, is associated with the set of agent groups from AGCC2. Map Contact Group 3 to AGCC2 and to the same reporting region (RR1), the same operating unit (OU1), and the same application group (AG1) with which Contact Group 1 is associated.
 - c. And so on with any other contact groups.



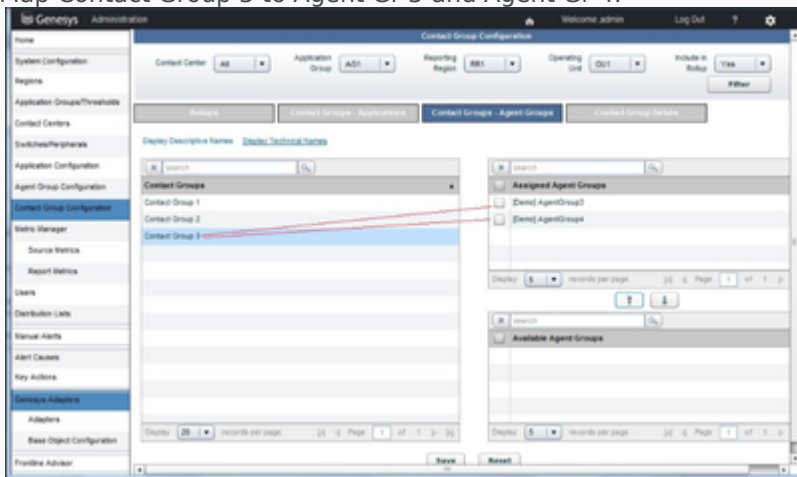
10. Map Contact Group 1 to Application 1.



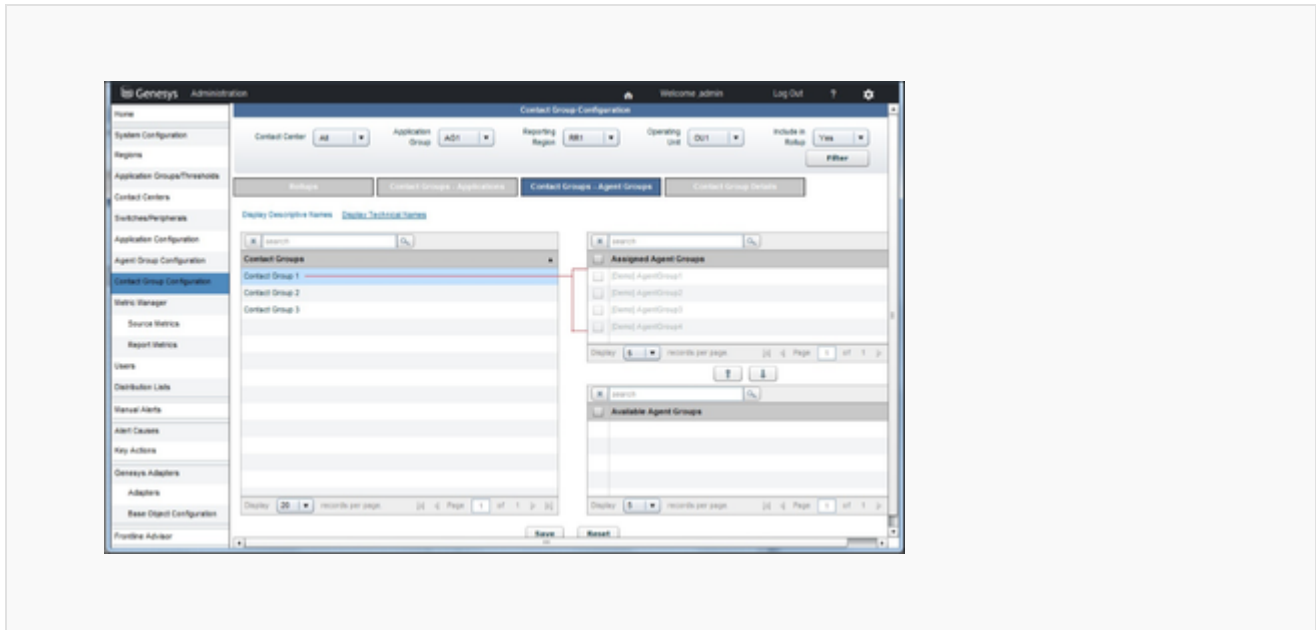
11. Map Contact Group 2 to Agent Gr 1 and Agent Gr 2.



12. Map Contact Group 3 to Agent Gr 3 and Agent Gr 4.

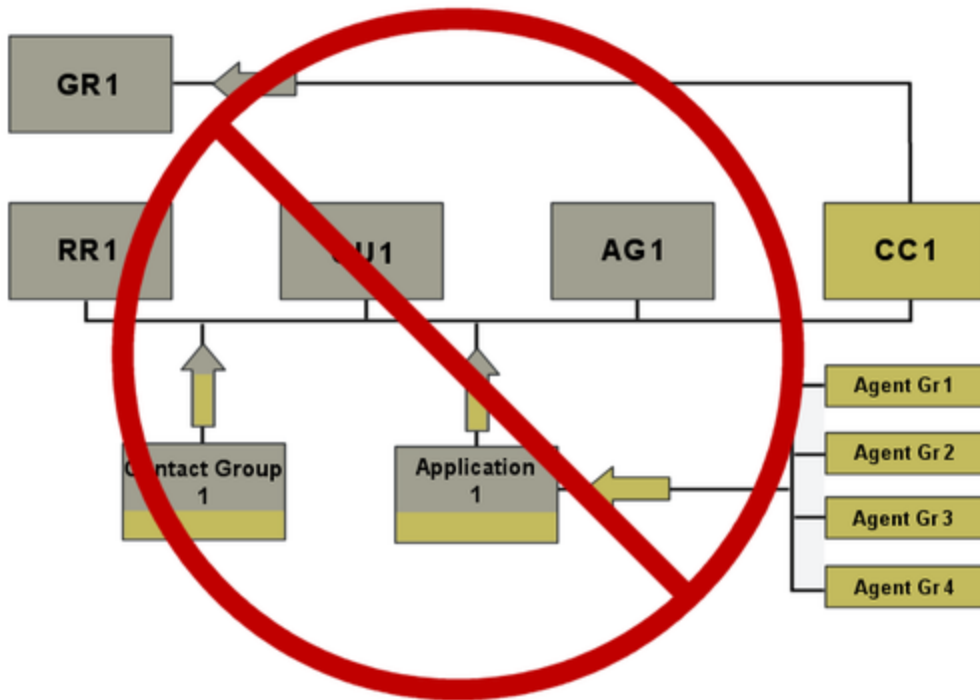


13. Verify in the Administration module that Agent Gr 1, Agent Gr 2, Agent Gr 3, and Agent Gr 4 are associated with Contact Group 1. The association between each relevant agent group and the contact group occurs automatically after Contact Group 1 is mapped to Application 1 if your configuration is valid.



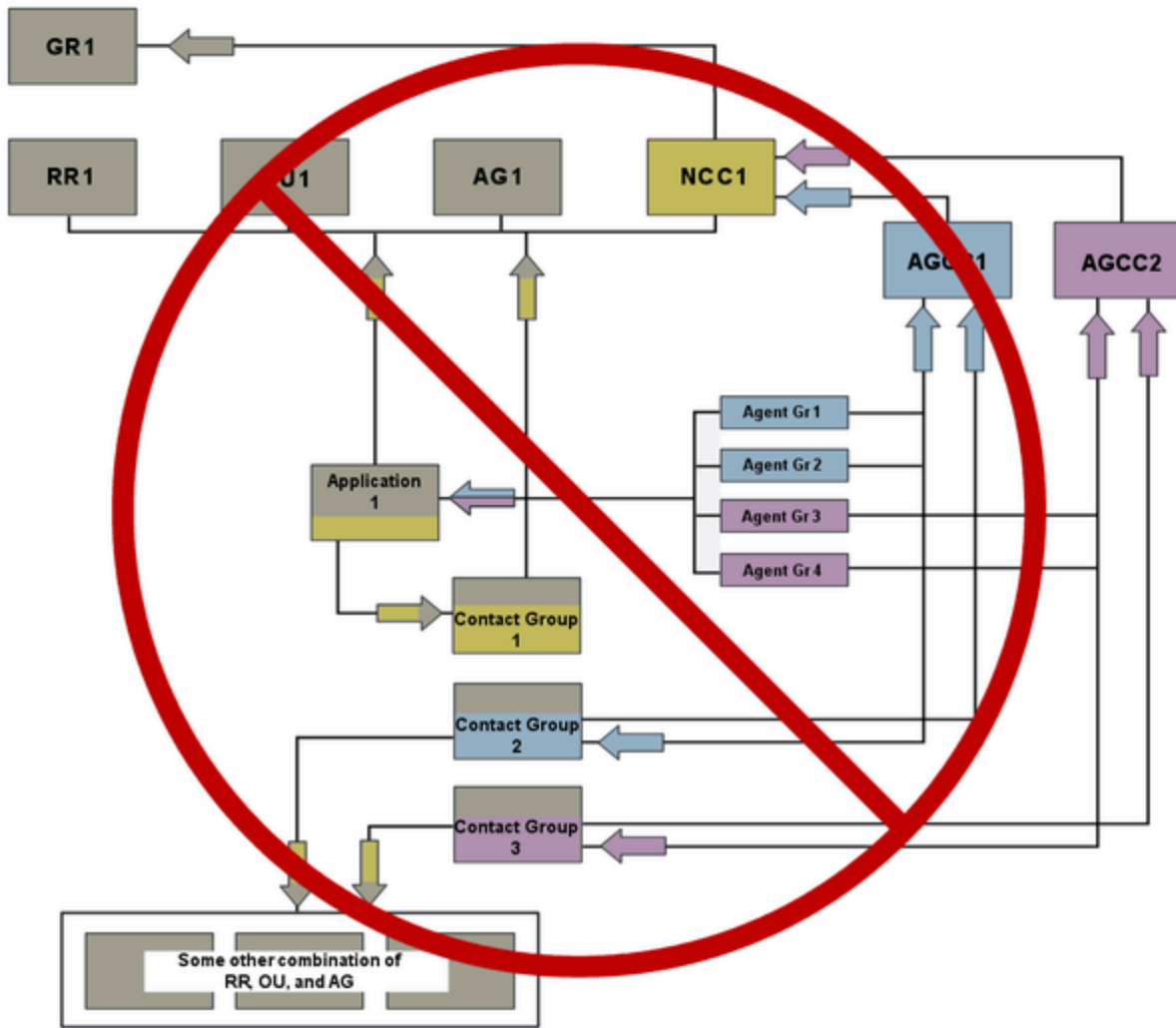
Incorrect Configuration: Contact Group Not Mapped To An Application

Failing to map the relevant contact group to an application results in an incomplete and incorrect configuration. If you use this configuration, the real-time WA metric operands will be absent, which results in inaccurate or missing metric values for the contact group and related aggregated objects.



Incorrect Configuration: Incorrectly Mapped Contact Groups

The configuration shown in the figure below is incorrect because the contact groups that are mapped to agent groups are associated with a different combination of reporting region, operating unit, and application group than the related contact group that is mapped to applications.



WA Configuration Examples for Independent Configuration Mode

In independent configuration mode, there are no dependencies between Workforce Advisor (WA) configuration and Contact Center Advisor (CCAdv) configuration. CCAdv and WA can operate with completely different sets of aggregated objects, applications, agent groups, and relationships amongst those. You can configure WA to be autonomous; that is, it can operate independently—even if CCAdv configuration is not present at all.

Independent mode is more generic than integrated mode. In independent mode, you can configure all of the same scenarios that you can configure in the integrated mode, but you must do more manual configuration work in the independent mode because WA does not use any of the relationships or associations from the CCAdv configuration. WA and CCAdv function based on their respective final configurations. Once configured, the configuration modes have no impact other than what you see in the Advisors administration module.

Related Information

For information about business objects (reporting regions, geographic regions, operating units, contact centers and application groups), see [Advisors Business Objects](#).

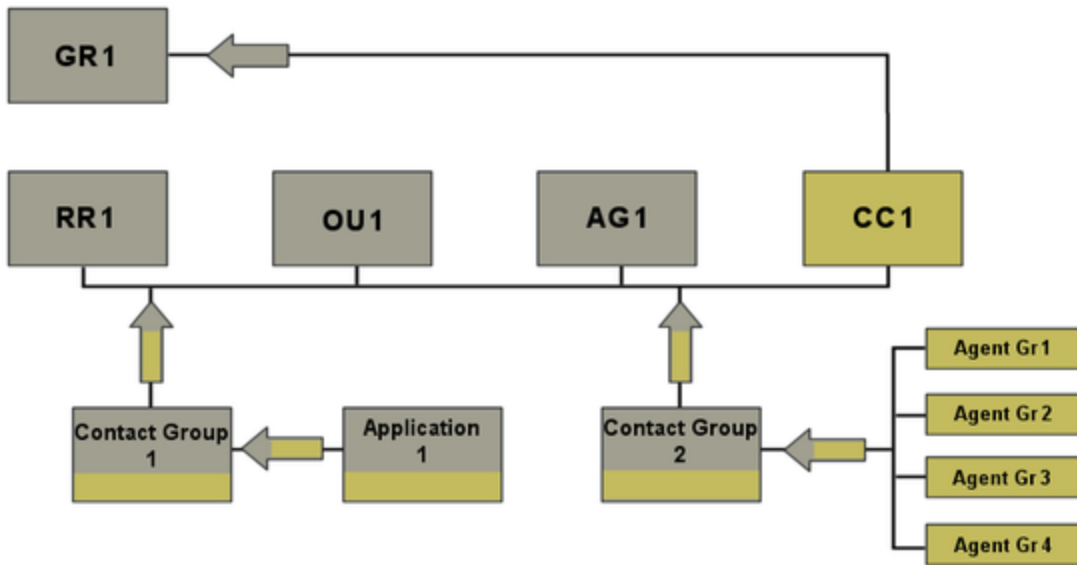
For additional information about agent groups and contact groups, see:

- [Agent Group Configuration](#)
- [Contact Group Configuration](#)

For information about configuring contact centers (site or network), see [Contact Centers](#) and [Configuring Contact Centers](#).

Correct Configuration: Simple Configuration Using Independent Mode

To correctly configure the deployment shown in the following Figure, see [Configuring WA using the Independent Configuration Mode: Basic Configuration](#)



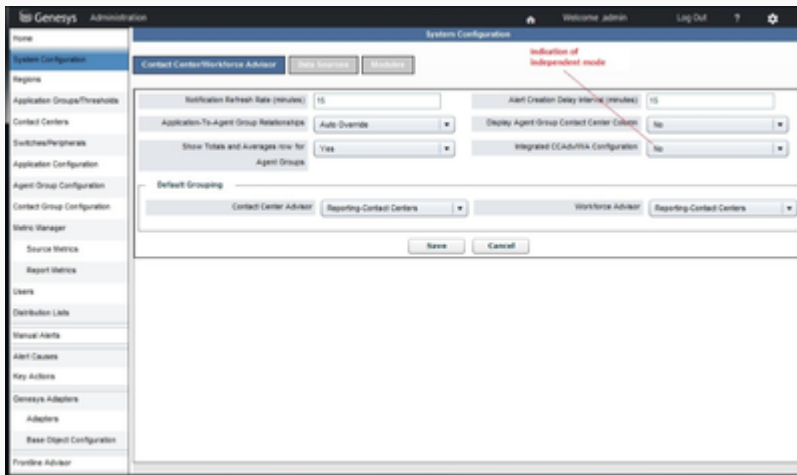
Legend:

- AG = Application Group
- Agent Gr = Agent Group
- CC = Contact Center
- GR = Geographic Region
- OU = Operating Unit
- RR = Reporting Region

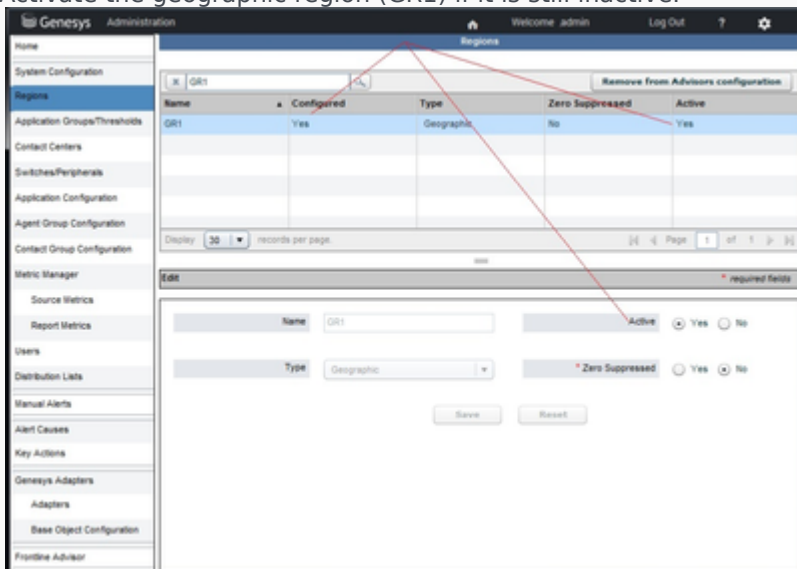
Procedure: Configuring WA using the Independent Configuration Mode: Basic Configuration

Steps

1. Verify that CCAAdv/WA configuration is set to the Independent configuration mode.

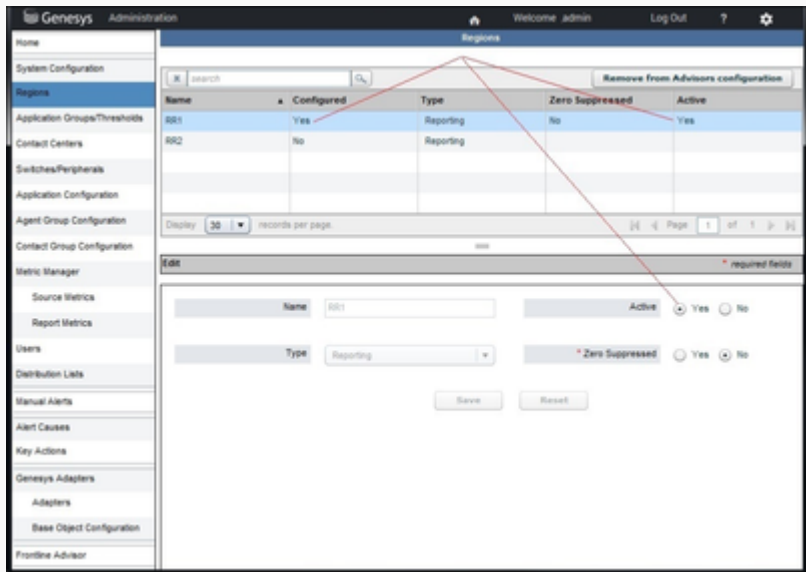


2. Activate the geographic region (GR1) if it is still inactive.

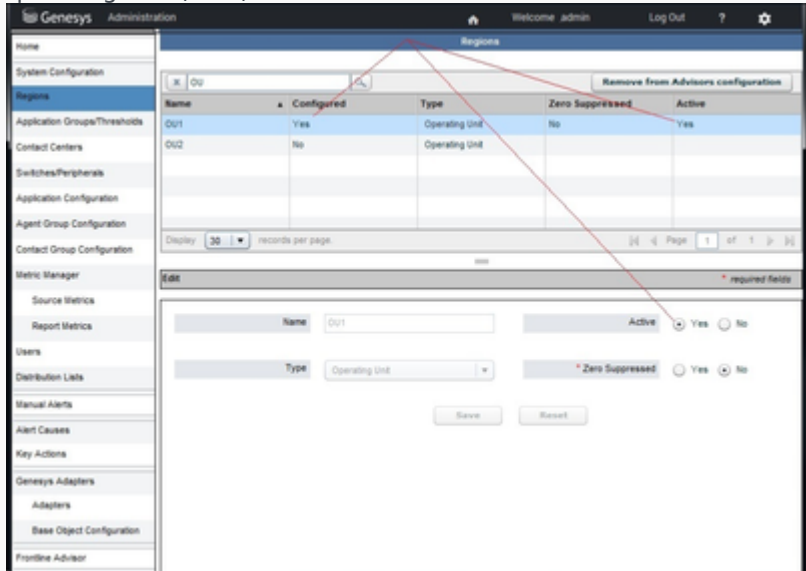


3. Make sure that any of the following objects that will participate in the configuration are active:

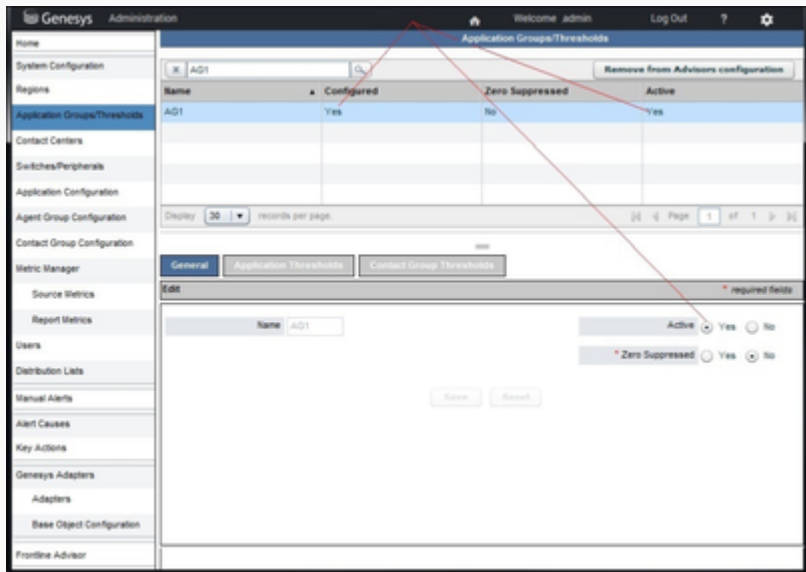
- reporting region (RR1)



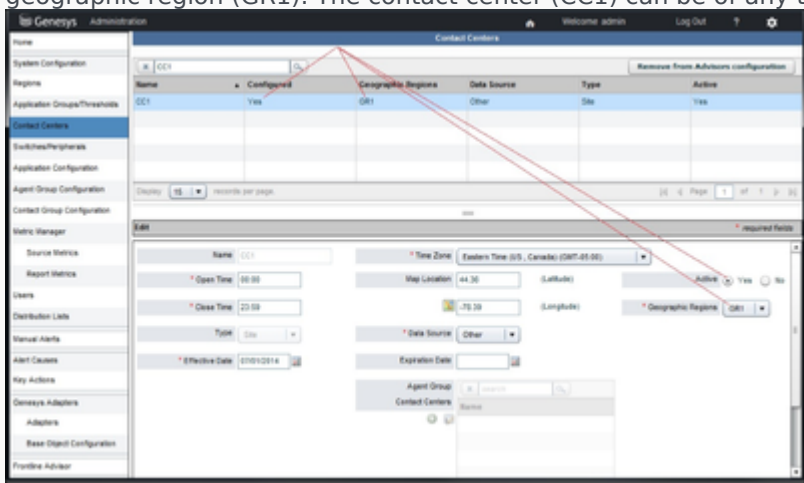
- operating unit (OU1)



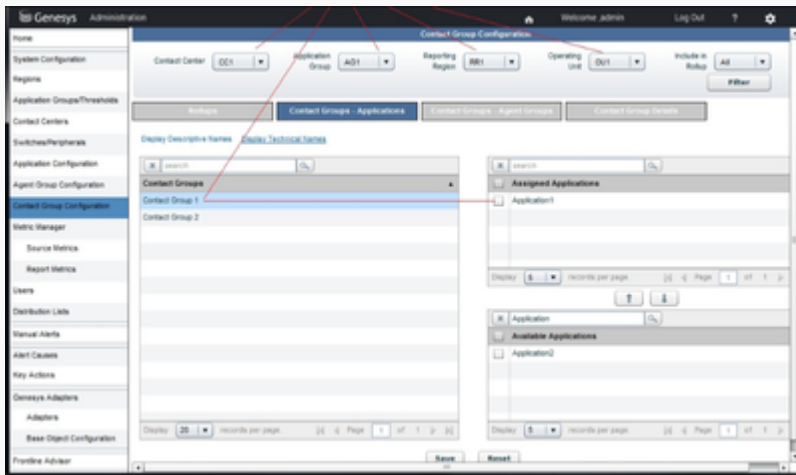
- application group (AG1)



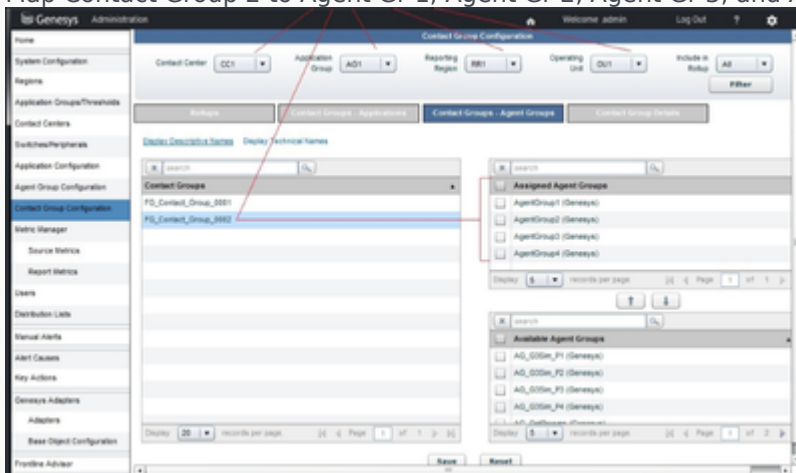
- 4. Configure a contact center (CC1), if it is not already configured, and associate it with the geographic region (GR1). The contact center (CC1) can be of any type.



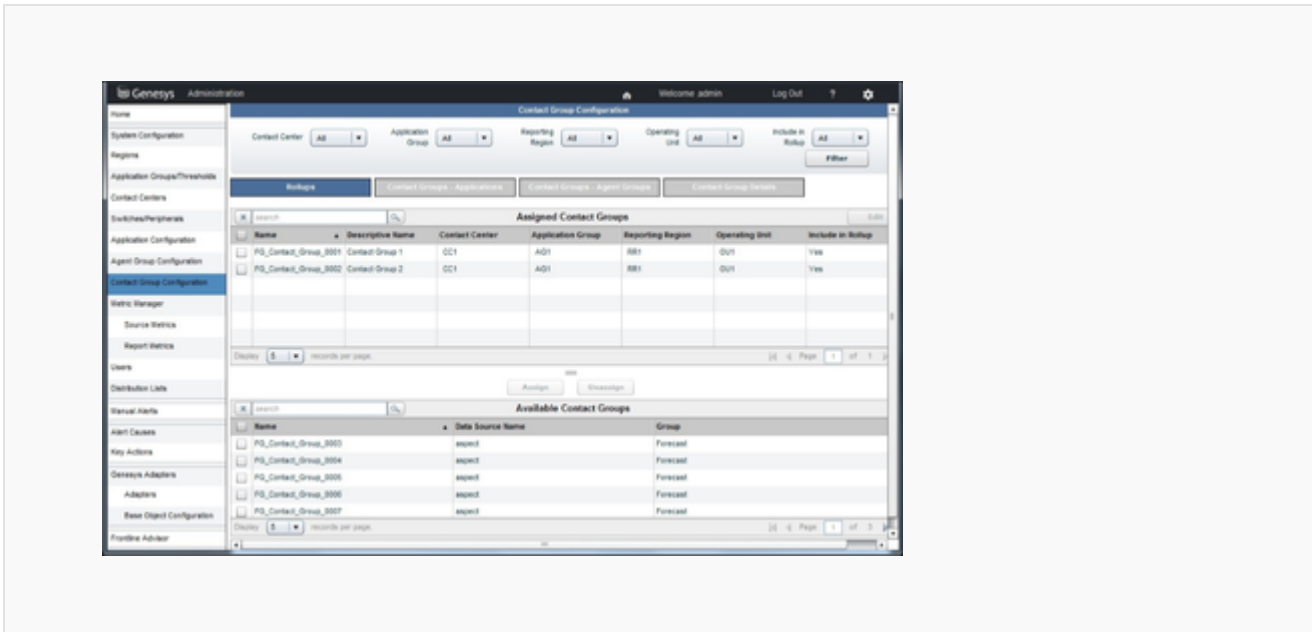
- 5. On the **Rollups** tab, choose a contact group (Contact Group 1) that, in the system, is associated with Application 1. Map Contact Group 1 to a contact center, a reporting region, an operating unit, and an application group. Switch to the **Contact Groups - Applications** tab and map Contact Group 1 to Application 1.



- 6. Switch to the **Contact Groups - Agent Groups** tab and choose a contact group (Contact Group 2) that, in the system, is associated with Agent Gr 1, Agent Gr 2, Agent Gr 3, and Agent Gr 4. Map Contact Group 2 to Agent Gr 1, Agent Gr 2, Agent Gr 3, and Agent Gr 4.

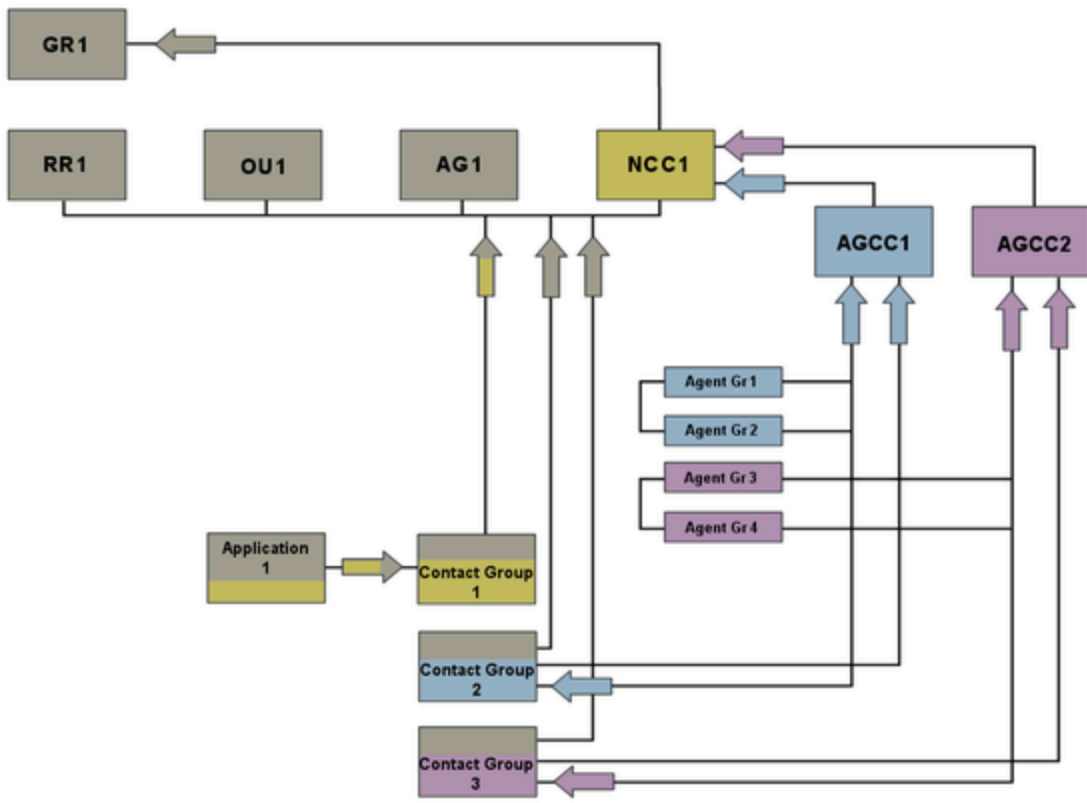


- 7. If Contact Group 1 is a parent of Contact Group 2 in the system, make sure that both are mapped to the same reporting region, operating unit, application group, and contact center.



Correct Configuration: Configuration With Agent Groups Divided Into Agent Group Contact Centers

To correctly configure the deployment shown in the following Figure, see [Configuring WA using the Independent Configuration Mode: Agent Groups Divided Into Agent Group Contact Centers](#).



Legend:

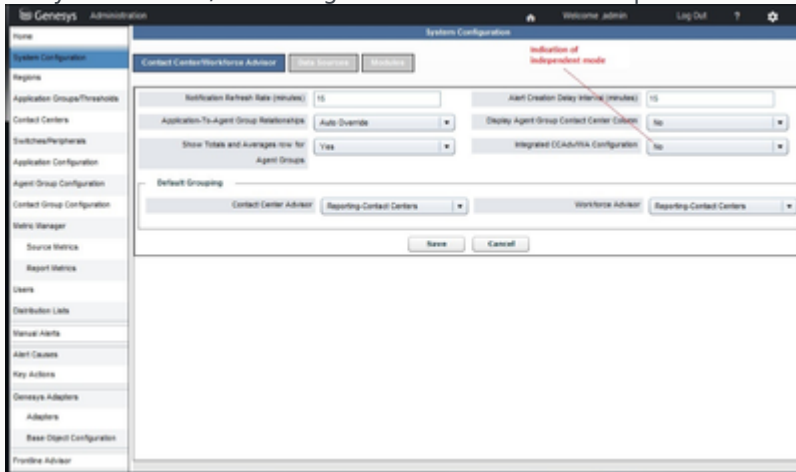
- AG = Application Group
- AGCC = Agent Group Contact Center
- Agent Gr = Agent Group
- GR = Geographic Region
- NCC = Network Contact Center
- OU = Operating Unit
- RR = Reporting Region

Procedure: Configuring WA using the Independent Configuration Mode: Agent Groups Divided Into Agent Group

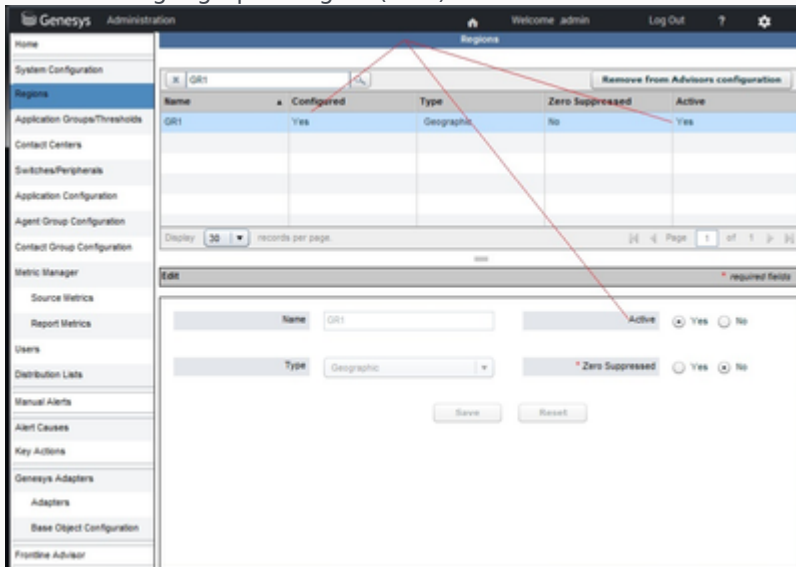
Contact Centers

Steps

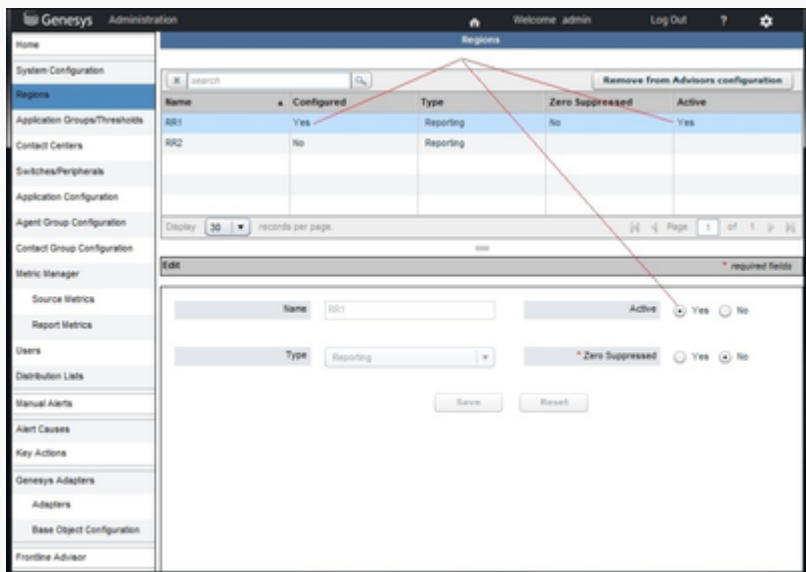
1. Verify that CCAdv/WA configuration is set to the Independent configuration mode.



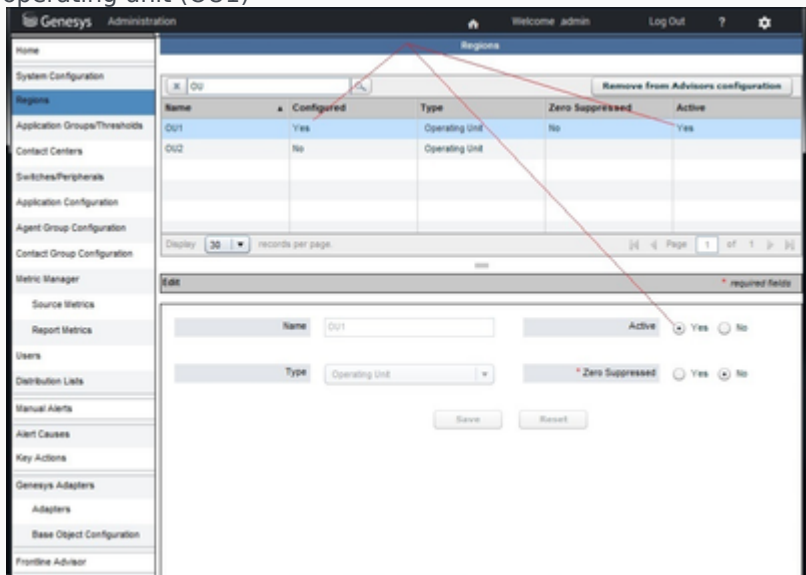
2. Activate the geographic region (GR1) if it is still inactive.



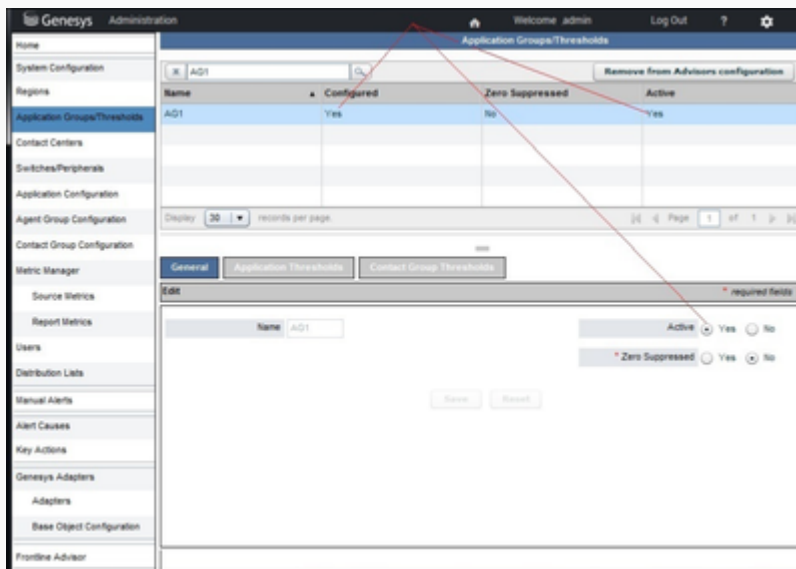
3. Make sure that any of the following objects that will participate in the configuration are active:
 - reporting region (RR1)



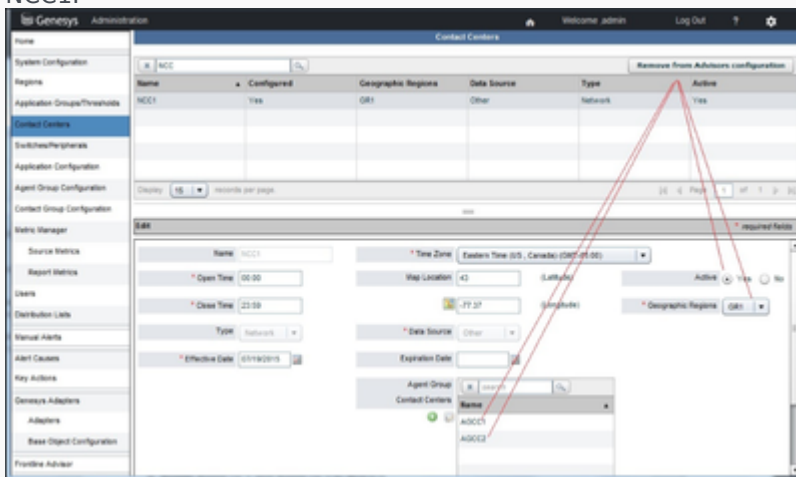
- operating unit (OU1)



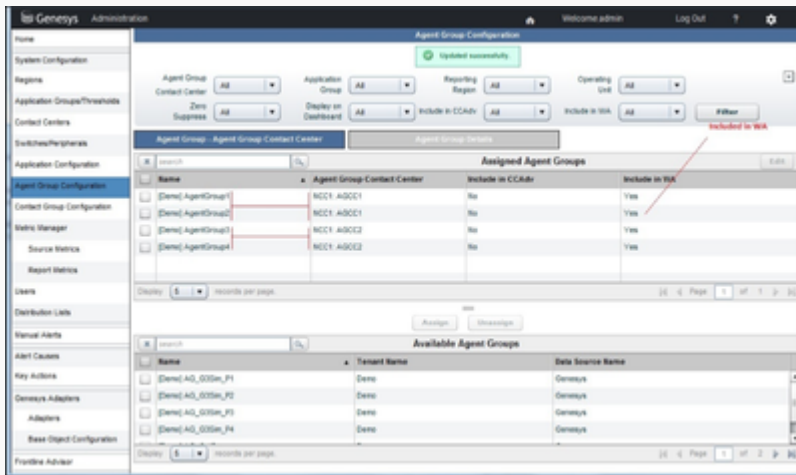
- application group (AG1)



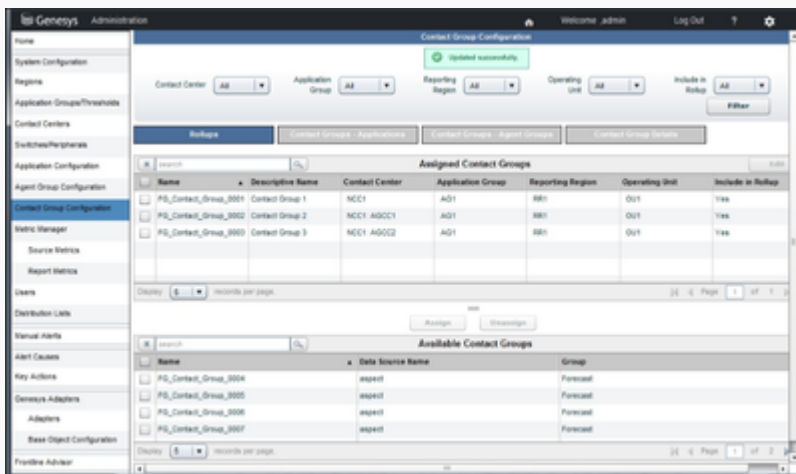
4. Configure a network contact center (NCC1), if it is not already configured, and associate it with a geographic region (GR1). Create agent group contact centers (AGCC1, AGCC2, and so on) within NCC1.



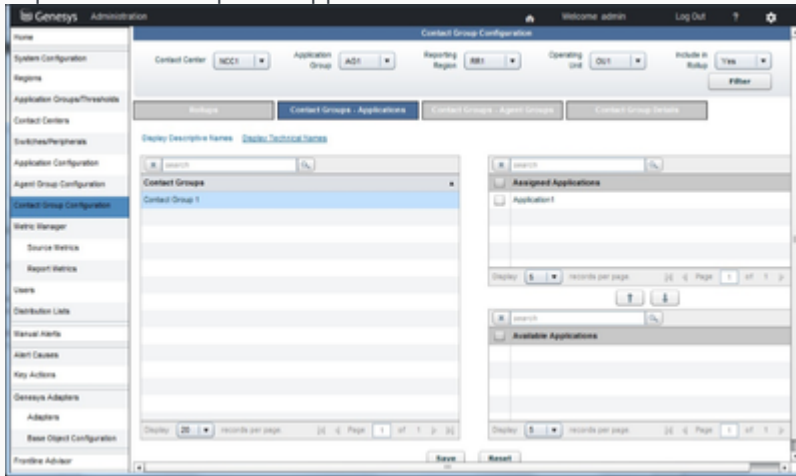
5. Map agent groups to AGCCs and include them in the WA configuration.



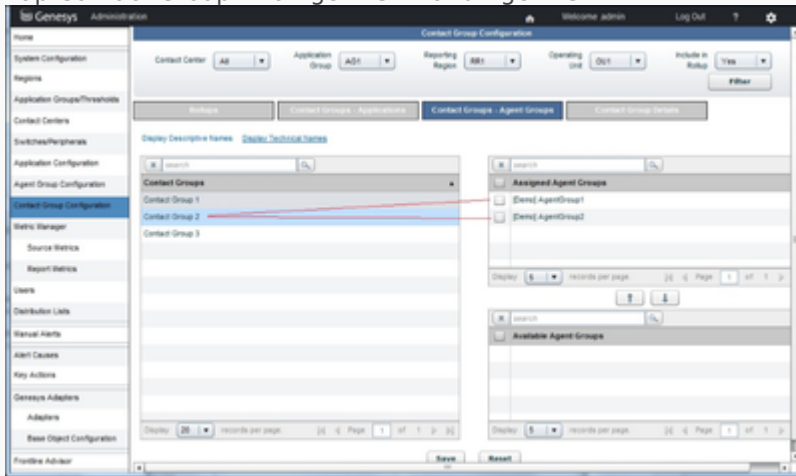
6. Map contact groups that are associated with agent groups already assigned to AGCCs:
 - a. Choose a contact group (Contact Group 1) that, in the system, is associated with an application (Application1) and map it to a network contact center (NCC1), reporting region (RR1), operating unit (OU1) and application group (AG1).
 - b. Choose a contact group (Contact Group 2) that, in the system, is associated with the set of agent groups from AGCC1. Map Contact Group 2 to AGCC1 and to the same reporting region (RR1), the same operating unit (OU1), and the same application group (AG1) with which Contact Group 1 is associated.
 - c. Choose a contact group (Contact Group 3) that, in the system, is associated with the set of agent groups from AGCC2. Map Contact Group 3 to AGCC2 and to the same reporting region (RR1), the same operating unit (OU1), and the same application group (AG1) with which Contact Group 1 is associated.
 - d. And so on with any other contact groups.



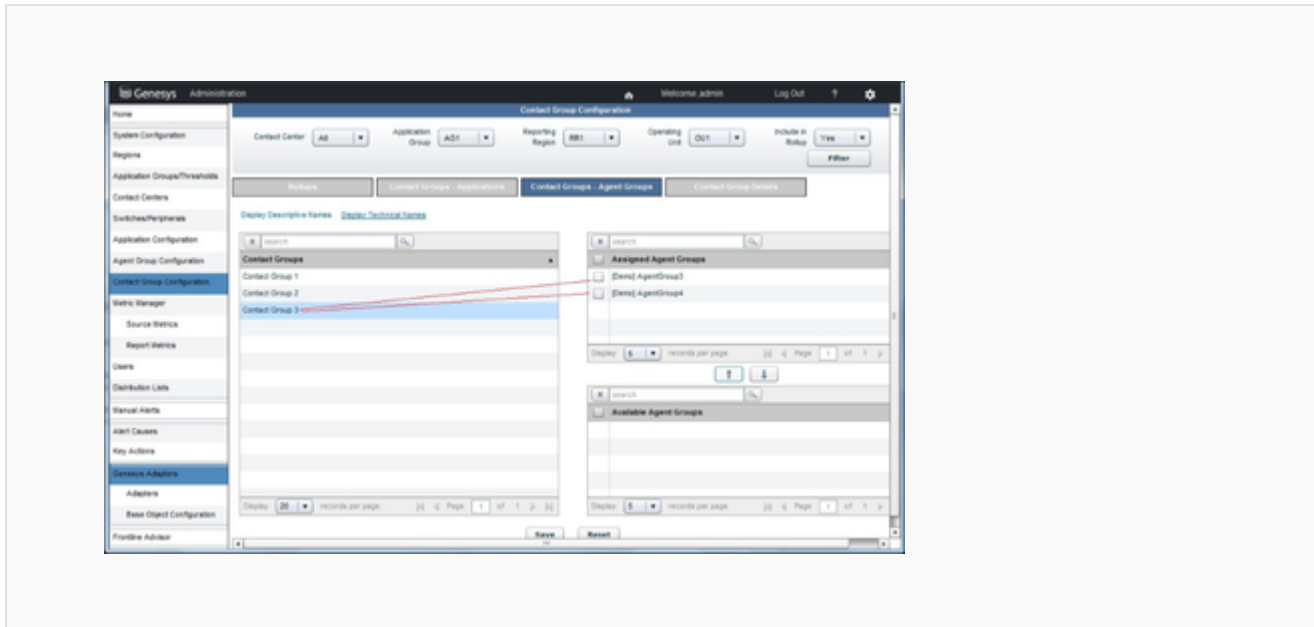
7. Map Contact Group 1 to Application 1.



8. Map Contact Group 2 to Agent Gr 1 and Agent Gr 2.

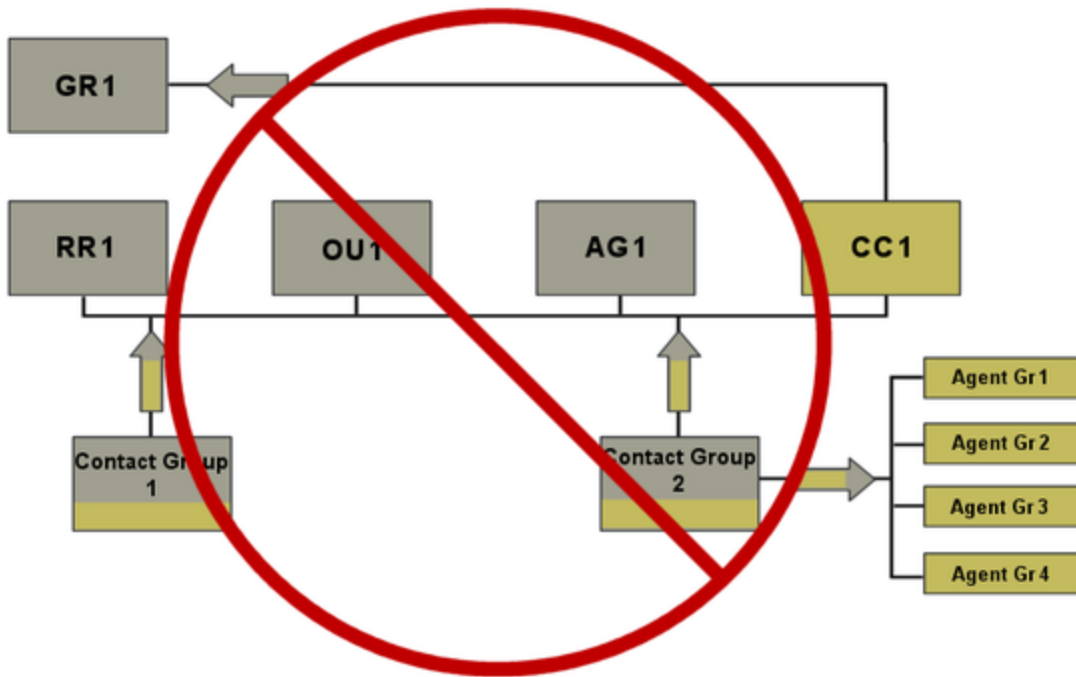


9. Map Contact Group 3 to Agent Gr 3 and Agent Gr 4.



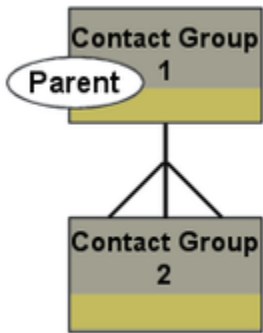
Incorrect Configuration: Contact Group Not Mapped To An Application

Failing to map the relevant contact group to an application results in an incomplete and incorrect configuration. If you use this configuration, the real-time WA metric operands will be absent, which results in inaccurate or missing metric values for the contact group and related aggregated objects.

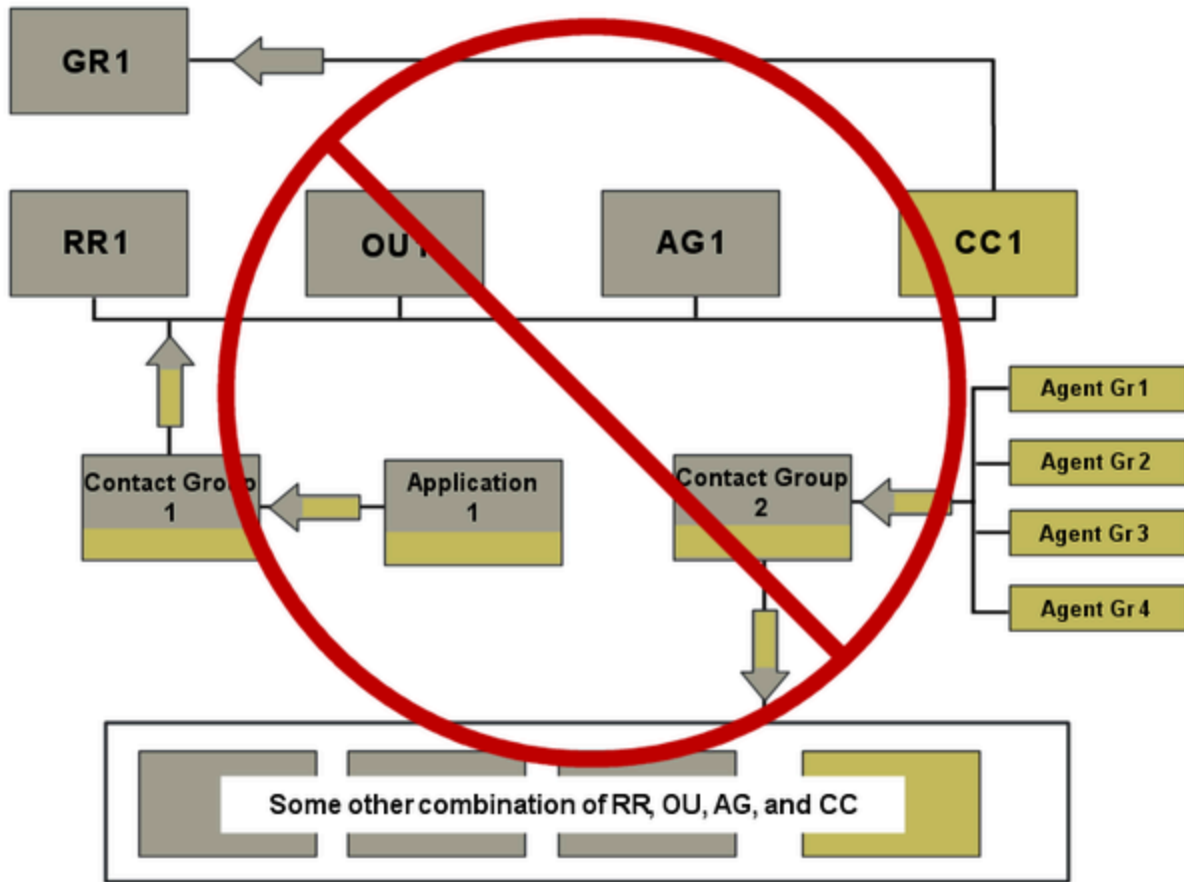


Incorrect Configuration: Incorrectly Mapped Contact Groups Example 1

In this example, Contact Group 1 is a *parent* of Contact Group 2.

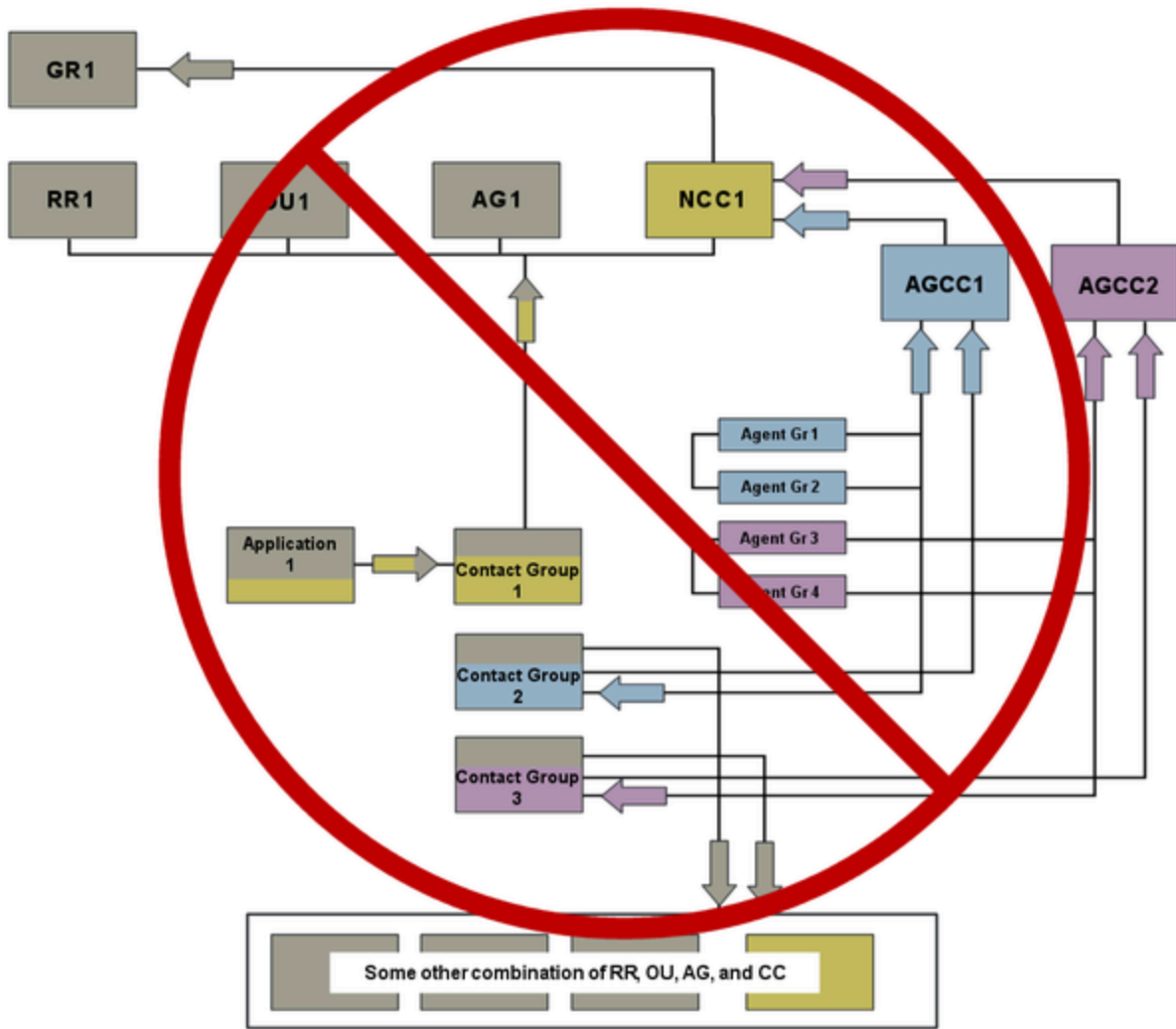


The configuration shown in the figure below is incorrect because the *parent* and *child* contact groups are associated with different combinations of reporting region, operating unit, application group, and contact center. To be correct configuration, each related contact group must be associated with the same combination of reporting region, operating unit, application group, and contact center.



Incorrect Configuration: Incorrectly Mapped Contact Groups Example 2

The configuration shown in the figure below is incorrect because the contact groups that are mapped to agent groups are associated with a different combination of reporting region, operating unit, and application group than the related contact group that is mapped to applications.



Advisors Business Objects

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

Important

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

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

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

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

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

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

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

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

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

Business Objects

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

1. Created initially in Genesys Administrator under a single tenant as business attributes.
2. Related to access groups or persons to assign permissions to see them.
3. Synchronized with the Platform database.
4. Subsequently configured to completion in the Advisors administration module.
5. Deleted only in Genesys Administrator (although they can be removed from Advisors without deleting them from Genesys Administrator).

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

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

Metrics

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

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

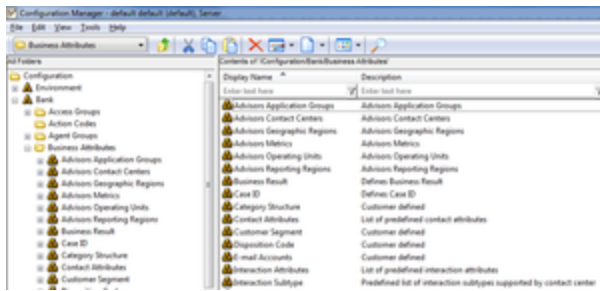
Important

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

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

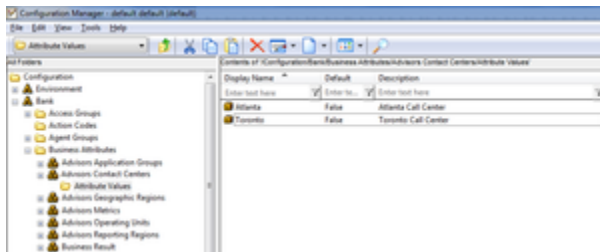
Examples

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



Configuration Manager Business Attributes

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



Configuration Manager Business Attributes—Individual Objects

Users

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

Important

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

Region Types

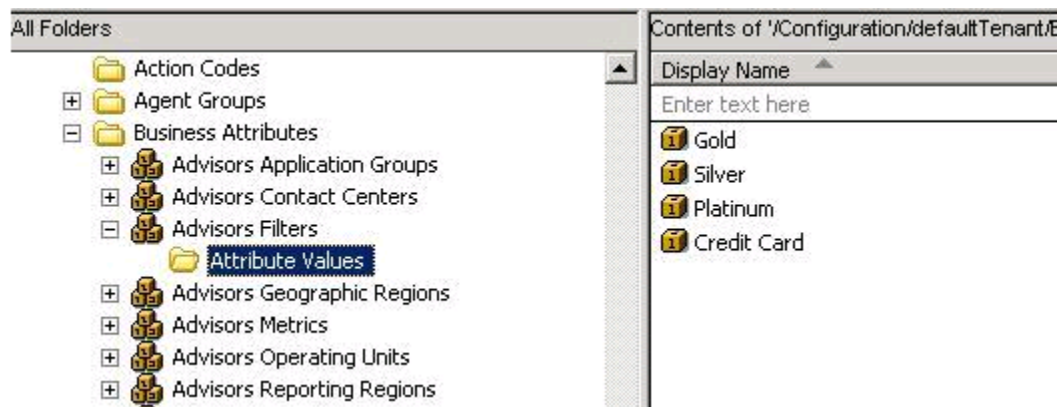
A region represents a subdivision of the business operations of your company within each of the following views:

- Geographic is based on the physical location of the contact center. The applications and contact groups within a contact center fall under only one geographic region.

- Reporting Region is management-based. Applications and contact groups within a contact center may fall within multiple reporting regions.
- Operating Unit is based on the defined groupings of your company that are summarized and displayed on the Operating Unit view. Applications and contact groups within a contact center may fall within multiple operating units.

Filters

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



Advisors Filters business attribute in Configuration Manager

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

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

Creating an Advisors Object as a Business Attribute

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

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

metric's display names in the Advisors administration **Report Metrics** page.

Warning

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

- **Tenant:** The tenant to which this Advisors object belongs. You choose the tenant when installing Advisors Platform, and cannot change it in Genesys Administrator.
- **Display Name:** The name of the object to display in Genesys Administrator. Advisors does not use this display name.
- **Description:** A simple description of this object. For a filter, enter the filter expression in the **Description** field. For any object other than a filter, Advisors does not use this description.

Required Permissions

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

Deleting an Advisors Object from Configuration Server

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

Required Permissions

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

Synchronization of Business Objects

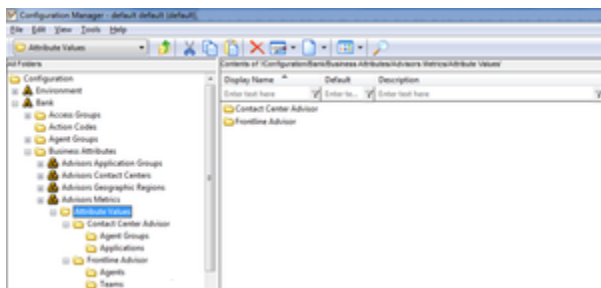
When a new business object is created in Genesys Administrator and saved, Advisors automatically propagates it to the Advisors Platform database. It appears in the administration module marked as not configured and inactive. Its remaining attributes must be configured in the Advisors administration module.

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

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

Creating Metrics

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



Configuration Manager Metrics Attributes

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

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

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

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

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

Objects in the Advisors Administration Module

Before you configure relationships among objects, it is important to note that there are some dependencies that affect your ability to configure data in the Administration module:

- Review the *Performance Management Advisors Deployment Guide* to ensure you have completed all deployment requirements. Also review the *Post Installation Configuration* topics in that book.
- Run Contact Center Advisor XML Generator to pull from the external data source systems the base objects you will configure in the Administration module. Until you do this, no switches/peripherals, applications, or agent groups will appear in the user interface.
- Run Workforce Advisor server to pull from the external WFM systems the contact groups you will configure in the Administration module. If you are using IEX TotalView, then use ftp (see *Importing Contact Groups into Advisors*) to push its contact groups into the Advisors Platform database. Until you do this, no contact groups will appear in the user interface.

Overview of Administration Module

Menu options for the Administration module are controlled by role-based access set up in Genesys Administrator. Administrators will only see menu items for which they have privileges assigned.

The administration module is designed to guide you through the correct configuration sequence for Contact Center Advisor and Workforce Advisor. The opening page of the administration module contains information to help you, and the left-hand navigation tree lists the pages in the order in which you configure objects, relationships, and so on.

To display metrics' values on dashboards, multiple procedures must be completed and base objects must be configured. You use the following Administration module pages to configure objects and relationships for display on the Contact Center Advisor and Workforce Advisor dashboards:

- System Configuration:
 - Contact Center Advisor/Workforce Advisor - To configure:
 - Notification refresh rate: How often Advisors sends e-mail about alerts.
 - Application to agent group relationships
 - Show Totals and Averages row for agent groups: Whether or not the Totals and Averages row appears in the Agent Groups pane in Contact Center Advisor and Workforce Advisor.
 - Alert Creation Delay Interval: How long a metric's value must exceed a threshold before Advisors creates an alert about it.
 - Display agent group contact center column: Whether this column appears in the Agent Groups pane in Contact Center Advisor.
 - Integrated CCAAdv/WA configuration: See *Configuration Modes*.

- Default grouping: in the Contact Centers pane in the dashboards.
- Data Sources: Specify how long an external source of real-time data can be quiescent before Advisors notifies users about it, and the distribution list to use to send the e-mail.
- Modules: To modify the application name that displays on the dashboard tabs.

See [System Configuration](#).

- Regions: Complete the configuration of regions to represent the subdivisions of your company's business operations. See [Regions](#).
- Application Groups/Thresholds: To provide a meaningful configuration of types of contact center activity in the dashboards, complete the configuration of application groups (see [Application Groups and Thresholds](#)). Threshold rules define the critical (red) and warning (yellow) conditions that trigger threshold violations, at the application group level. To define the critical and warning conditions for each metric in the context of an application group, see [Adding or Updating Thresholds](#).
- Contact Centers: Complete the configuration of contact centers for a data source that supplies applications and agent groups, and select a geographic region for each; see [Configuring Contact Centers](#).
- Switches/Peripherals: To enable or disable a Genesys switch or Cisco peripheral as far as Advisors is concerned. (A peripheral is a communications interface between a call distributor and call router.) To change this status, see [Switches and Peripherals](#).
- Application Configuration:
 - Rollups: To configure the hierarchy displayed on the dashboard, create the associations between applications, agent groups, and the levels in the hierarchy (for example, regions, contact centers, and application groups).
 - Applications – Agent Groups: Assign agent groups to applications.
 - Application Details: Define descriptive names for applications and change their settings for zero suppression, being displayed on the dashboard, and SL Threshold.
- Agent Group Configuration: Map agent groups to an agent-group contact center. Configure agent groups to display on the dashboard. See [Agent Group Configuration](#).
- Contact Group Configuration: (WA only)
 - Rollups: To configure the hierarchy displayed on the dashboard, create the associations between contact groups and the levels in the hierarchy (for example, regions, contact centers, and application groups).
 - Contact Groups–Applications: Assign applications to contact groups.
 - Contact Groups–Agent Groups: Assign agent groups to contact groups.
 - Contact Group Details: Define descriptive names for contact groups and change their other properties.
- Metric Manager: The Metric Manager section consists of the Source Metrics and the Report Metrics pages. Use the Metric Manager pages to define the many properties of a metric, such as its descriptive name. See [Metric Manager](#).
- Users: All creation and configuration of users is done in Genesys Administrator. See [Advisors Business Objects](#).
- Distribution Lists: To group users who are sent e-mail about alerts based on a specific alert type, add distribution lists and select the users, contact centers, and application groups you want to relate to the distribution list. See [Working with Distribution Lists](#).

-
- **Manual Alerts:** Add manual alerts and specify the alert type and affected contact centers. See [Manual Alerts](#).
 - **Alert Causes:** Add and approve alert causes used in Action Management reports. See [Alert Causes](#).
 - **Key Actions:** Add and approve key actions used in Action Management reports. See [Key Actions](#).
 - **Genesys Adapters:** The Genesys Adapters section consists of the following pages:
 - **Adapters page:** The Adapters page is read-only; you can view information about adapters on this page. You no longer select an adapter before performing object configuration.
 - **Base Object Configuration page:** You can view and maintain the list of agent group, queue, and filter combinations. See [Base Object Configuration](#)
 - **Control Panel:** The Control Panel section consists of the following pages:
 - **Notification Lists:** If Resource Management is installed, notifications lists are used to inform groups of users within an organization about changes being made to the agents or resources. To view and maintain notification lists, see [Notification Lists](#).
 - **Notification Templates:** If Resource Management is installed, provide standard content for e-mails describing the directives and actions taken from Resource Management. To view and maintain notification templates, see [Notification Templates](#).

Notes about the Interface

Asterisks (*) indicate required fields.

- The date format is MM/DD/YYYY.
- The time format is HH:MM using the 24-hour clock.
- The e-mail address format is username@company.com.
- To search a list of items in a table, type any valid character string from the item's name in the Search field, then click the icon beside the field. The items that match the entered string display. For example, typing `nv` will display Denver. To display the whole list again, click the `x` beside the Search field.

The search functionality is not available on the Alerts pages.

Where paging is implemented, to navigate to the next or previous page in the returned list, click the arrows in the paging control at the bottom right of the table; to navigate to the first or last page in the returned list, click the double arrows in the paging control.

The Administration module is available in English only.

NEW Genesys recommends that you disable **Compatibility View** mode for Advisors if you use Microsoft Internet Explorer as your browser.

Important

NEW Starting in Advisors release 8.5.1, you can open Advisors dashboards in Microsoft Internet Explorer, Google Chrome, or Mozilla Firefox. If you open multiple Advisors sessions simultaneously, ensure you use one type of browser. For example, if you are running Contact Center Advisor in Google Chrome, and you want to open another Contact Center Advisor session or a Workforce Advisor session in another browser tab or window, then that browser must also be Chrome. Similarly, if you want to open multiple Frontline Advisor sessions, you must open all in the same type of browser.

Zero Suppression

Zero suppression is used to prevent objects from displaying on dashboards when there is no activity for them. Certain combinations of metrics' values are used as criteria for the objects to become suppressed. The rules are different for different objects.

Zero Suppression Rules

The following sections provide guidelines for using zero suppression. The metrics that are used in the rules must be enabled for zero suppression to work.

Contact Group

Contact Groups can never be suppressed.

Application

For applications that reflect voice activity (CISCO services, call types and Genesys queues), if zero suppress = Yes, the following criteria must be met for the application to be hidden on the dashboard:

- calls offered is 0 or N/A *and* calls handled is 0 or N/A

For applications that reflect multi-channel activity (Genesys interaction queues), if zero suppress = Yes, the following criteria must be met for the application to be hidden on the dashboard:

- e-mails entered is 0 or N/A *and* e-mails processed is 0 or N/A *and* Web-chats entered is 0 or N/A *and* Web-chats processed is 0 or N/A

Agent Group

If zero suppress = Yes, and if only CISCO external systems are present, then an agent group is hidden on the dashboard when:

- calls offered is 0 or N/A *and* calls handled is 0 or N/A *and* logged on is 0 or N/A

If at least one Genesys external system is present, then in addition to the above criteria:

- e-mails offered is 0 or N/A *and* e-mails handled is 0 or N/A *and* Web-chats offered is 0 or N/A *and* Web interactions handled is 0 or N/A

Depending on your WA system configuration, logged on could be excluded from this criteria.

The Logged On criterion is included by default. To exclude it, in conf/WorkforceUtilizationZeroSuppression.properties, change the value zero_suppress.check_loggedin_for_skill_group and restart WA server and web services.

Region

For WA, if zero suppress = Yes and forecast calls offered, calls offered, and calls handled are N/A or 0, then a Region is hidden on the dashboard.

For CCAdv, if zero suppress = Yes and if only CISCO external systems are present, then a Region is hidden on the dashboard when:

- calls offered is 0 or N/A *and* calls handled is 0 or N/A

If at least one Genesys external system is present, then in addition to the above criteria:

- e-mails entered is 0 or N/A *and* e-mails processed is 0 or N/A *and* Web-chats entered is 0 or N/A *and* Web-chats processed is 0 or N/A

Application Group

For WA, if zero suppress = Yes and forecast calls offered, calls offered, and calls handled are 0 or N/A, then an application group is hidden on the dashboard. For CCAdv, if zero suppress = Yes and if only CISCO external systems are present, then an application group is hidden on the dashboard when:

- calls offered is 0 or N/A *and* calls handled is 0 or N/A

If at least one Genesys external system is present, then in addition to the above criteria:

- e-mails entered is 0 or N/A *and* e-mails processed is 0 or N/A *and* Web-chats entered is 0 or N/A *and* Web-chats processed is 0 or N/A

Multiple Time Profiles in CCAdv

The CCAdv dashboard can simultaneously display metrics from more than one time profile. When a row in this dashboard becomes suppressed, or leaves suppression, the row can display with certain cells empty. The empty cells are from the time profile that is now zero-suppressed, or was zero-suppressed. In time, the row will either not display at all, or completely display.

Disabled Metrics

In the Administration module, you can disable an application group metric or agent group metric. Advisors does not collect real-time values for a disabled metric. If a metric that CCAdv uses to evaluate zero suppression is disabled, values for it are not collected and CCAdv sees its value as zero. That will influence zero suppression.

For example, if the calls offered metric and calls handled metrics are disabled, then CCAdv will see their values as zero for every application. A voice queue for which zero suppress = Yes will be zero-suppressed and will not appear on the dashboard even if it actually has currently offered calls, or calls being handled.

Disabling such a metric also affects zero suppression in WA. If you disabled CCAAdv's calls offered metric, this means that Advisors does not collect data for it for either CCAAdv or for WA. Zero suppression in WA will also see its value as zero.

System Configuration

The **System Configuration** page allows you to control various global capabilities in CCAAdv and WA. To make changes, edit the relevant fields and click **Save**. Changes take effect immediately.

Access to this menu option must be configured by an administrator in Genesys Configuration Manager.

The screenshot displays the 'System Configuration' page with three tabs: 'Contact Center/Workforce Advisor' (selected), 'Data Sources', and 'Modules'. The 'Contact Center/Workforce Advisor' tab contains the following settings:

- Notification Refresh Rate (minutes): 15
- Alert Creation Delay Interval (minutes): [empty]
- Application-To-Agent Group Relationships: Auto Override
- Show Totals and Averages row for Agent Groups: No
- Display Agent Group Contact Center Column: [empty]
- Integrated CCAAdv/WA Configuration: [empty]
- Default Grouping:
 - Contact Center Advisor: Reporting-Contact Centers
 - Workforce Advisor: [empty]

At the bottom of the form are 'Save' and 'Cancel' buttons.

System Configuration Page

The screenshot, "**System Configuration** page", shows the **System Configuration** page.

System Configuration Tabs

The **System Configuration** page consists of the following three subsections presented as tabs:

- **Contact Center/Workforce Advisor** (displayed by default)
- **Data Sources**
- **Modules**

Contact Center / Workforce Advisor Tab

The **Contact Center/Workforce Advisor** tab displays the following fields:

- **Notification Refresh Rate (minutes):** Determines the frequency of sending e-mail messages about alerts. The delay prevents unnecessary repetition of alert messages. Every minute, Contact Center Advisor and Workforce Advisor checks for notifiable alerts and the time an e-mail about the alert was last sent. For each alert, if the time that the e-mail was last sent is older than the notification refresh rate, an e-mail is sent. E-mail about the alert is also sent if the priority of the alert has changed since the last e-mail message about the alert, independent of the refresh rate. For more information about alerts, see [Application Groups and Thresholds](#).
- **Alert Creation Delay Interval (minutes):** Controls how many minutes a metric's value must exist in a state exceeding a threshold before Advisors creates an alert that appears in the Alerts Map, Alerts Pane, and Alert Management. Alerts about offline peripherals in Cisco ICM, and manual alerts, are an exception to this rate: they appear immediately.
- **Application-to-Agent Group Relationships:**
 - **Manual:** You manually assign agent group(s) to an application or application(s) to an agent group. For CISCO ICM the relationships between Services and Skill Groups that are pre-determined at the source will not be imported if manual mode is selected.
 - **Auto Override:** You manually assign agent group(s) to an application or application(s) to an agent group. For CISCO ICM the relationships between Services and Skill Groups that are pre-determined at the source will be imported automatically.

The consequences of changing the **Application-to-Agent Group Relationships** option are:

- Changing from Manual to Auto Override will trigger the automatic import of the relationships that exist at the source.
- Changing from Manual to Auto Override honors manual entries. Only the relationships that you exclude are removed. Changing from Auto Override to Manual honors manual entries.
- Changing Auto Override to Manual prevents relationships from being imported from the source and erases all automatically imported relationships. After the change, all relationships must be created manually from the administration module.
- **Display Agent Group Contact Center Column:** Determines whether the **Contact Center** column is displayed in the **Agent Groups** pane in Contact Center Advisor, thereby controlling whether dashboard users can see the name of the agent group contact center for an agent group related to a network contact center.
The interval at which the Contact Center Advisor and Workforce Advisor read data from external data sources is not displayed on the page. It is in XML configuration files (CCAdv) or a properties file (WA) in the Advisors deployment directory, and can be changed, but is separately maintained so that it is not arbitrarily changed.
- **Show Totals and Averages Row for Agent Groups:** Yes/No. Determines whether the **Totals and Averages** row appears in the **Agent Groups** pane in a dashboard (Contact Center Advisor and Workforce Advisor). This row aggregates the values of metrics of the agent groups related to the applications or contact groups related to the aggregating object currently selected in the **Contact Centers** pane. The default setting is to display the **Totals and Averages** row. You must restart the XML Generator for your changes to appear on the dashboard.
- **Integrated CCAdv/WA Configuration:** Yes/No. Choose between two Contact Center Advisor/Workforce Advisor configuration modes:
 - Integrated CCAdv/WA configuration mode
 - Independent CCAdv/WA configuration mode

The default is integrated configuration mode. The choice of the mode determines all further configuration processes, what data is stored, and how the configuration data is interpreted and used inside the application. You can change the mode at any time. A change to the parameter has an immediate impact on the application.

If you select the integrated CCAdv/WA configuration mode, the configuration of Workforce Advisor depends on that of Contact

Center Advisor. If you select independent configuration mode, WA operates independently from the CCAdv configuration structure.

For detailed information, see [Configuration Modes](#).

- **Default Grouping:** Use the drop-down lists to change the default grouping selection for the CCAdv and WA Contact Centers panes. The default grouping selection for business objects in CCAdv and WA is Reporting Region - Contact Centers. You might have users who cannot change the grouping (that is, they do not have the necessary permissions); in that case, you might prefer to have a different default grouping.

For users who have permission to change the grouping, the default grouping applies only to initial login to Contact Center Advisor or Workforce Advisor. If the user changes the grouping, the grouping that the user selected is cached and maintained. The selected grouping displays after the user logs out and logs in again.

The selected default grouping does not force the configuration to include that region type. For example, if the default grouping is Reporting Region - Contact Centers, you can still configure an application or a contact group so that it is not related to a reporting region. It will not appear in the dashboards when that grouping is selected, and it will not contribute values to the rollup for that grouping.

If users are unable to change the grouping on the dashboard, ensure that the region type in the default grouping is also used in the configuration of the objects you want those users to see.

Data Sources Tab

The **Data Sources** tab displays a list of the real-time data sources connected to the Advisors suite. The fields represent the following:

- **Status:** Shows the current status of this data source. If the data source's controller time has not been updated for the duration specified by the update delay threshold, then a red icon is displayed in this column next to that data source.
- **Name:** The name of the data source that was registered when installing XML Generator. This field represents the name of a SQL Server database, Oracle schema, or a database link associated with the data source. This is a noneditable field.
- **Descriptive Name:** Descriptive name of the data source. Can be edited by an administrator and is a required field. Appears in the tooltip of the red stop sign icon displayed in the Contact Center Advisor dashboard when the data source has exceeded the update delay threshold.
- **Type:** Underlying platform for the data source, as specified when installing CCAdv. Current supported values are GENESYS and CISCO. This value cannot be changed by the administrator through the user interface.
- **Update Delay Threshold (minutes):** The maximum number of minutes allowed between the last update time of the data source and the current time. Exceeding this threshold causes the red stop sign icon to display in the top right of Contact Center Advisor's dashboard, and in the Status field in this page. This value can be edited and is required. The minimum value that can be entered in this field is 1 and the maximum value is 30.
- **Last Update:** The time of the last update from this data source in the time zone of the server on which the administration user interface is running. This is the controller time in the external data source system and is a noneditable field.
- **Distribution List:** [Distribution list](#) to which e-mail is sent if the data source's controller time is not updated and the delay violates the delay threshold. If no distribution list has been previously selected for a data source, the drop-down shows the Select option. Otherwise it shows the distribution list associated with the data source. Note that in the use of this distribution list, Contact Center Advisor

ignores the settings of an alert's priority and severity, and it also does not use any contact centers or application groups associated with the distribution list.

Modules Tab

The **Modules** tab displays the names and URLs of individual modules of your installation.

Application Name: You can modify the name that displays for the module in the menu you use to switch between modules.

Deployment URL: You can modify the URL that Advisors uses to load each module, but Genesys recommends that you never do this. Use this as reference information only.

Version: Shows the version number of the module version so you can check what you have deployed.

Regions

This section describes how to configure regions in Performance Advisors. The following screenshot shows the **Regions** page.

Regions

Name ▲	Configured	Type	Zero Suppressed
ABCD	No	Reporting	
ABCD	No	Operating Unit	
abcd	No	Operating Unit	
abcd1	No	Operating Unit	
ABCD1	No	Reporting	
ABCD1	No	Operating Unit	

Display 15 records per page.

Edit

Name

Type

Select ▼

Active
 Yes No

* Zero Suppressed
 Yes No

Save

Reset

Regions Page in the Administration Module

Region Types

In the pane, alerts are shown in relation to a geographic region. CCAAdv and WA filter alerts by the user's permission to see the geographic region associated with the alerts. So, to see alerts in the alerts pane, you must have permission to the alert's corresponding geographic region, as well as the contact center and application group related to the application or contact group that displays the violation.

Adding/Deleting a New Region

New regions must be added in Genesys Administrator. Adding and deleting regions cannot be performed in the Advisors administration module. However, you can make a region inactive, or remove it from the Advisors configuration. To add a new region in Genesys Administrator, or to delete a region, see [Advisors Business Objects](#).

Configuring a Region's Attributes in Advisors

To edit a region's active status and zero suppression status, select the region in the upper panel and edit these details in the **Edit** panel. Alternatively, locate the region in the list by typing the first few letters of its name in the **Search** field, click **Search**, and then select from the list. When your edits are complete, click **Save**. The **Name** and the **Type** fields cannot be edited. These values are configured in Genesys Administrator. Complete the fields in the **Edit** panel as follows:

- **Active:** Select whether the status of the region is active or inactive. The first time you make a region Active, it becomes part of the Advisors configuration. After this, you can use it to configure applications and contact groups. When you change such a region to Inactive, it remains available to use in configuration and the configurations in which it is used do not change. But CCAAdv and WA do not use the region when calculating data for the dashboards.
- **Zero Suppressed:** You can select Yes for regions where little or no activity is expected. See [Zero Suppression](#) for details.

When you have made the **Edit** panel selections and saved them, the following happens:

- If the region has been newly created in Genesys Administrator, the **Configured** field changes to Yes to indicate that the configuration is now complete on the Advisors side.
- An Updated Successfully message displays at the top of the page.
- The **Remove from Advisors configuration** button is activated.

Removing a Region from Advisors Configuration

To remove the region from the Advisors configuration, click on the **Remove from Advisors Configuration** button. This removal is not synchronized back to Configuration Server. The region continues to be present in the regions list, but displays as not configured and not active. The region completely disappears from the list only after if it is deleted from Genesys Administrator.

Important

Before removing a region from the Advisors configuration, you must remove its assignment from contact centers and configured applications and contact groups.

Application Groups and Thresholds

This section describes how to configure application groups and thresholds. The following screenshot shows the **Application Groups/Thresholds** page in the Administration module.

The screenshot displays the 'Application Groups/Thresholds' page. At the top, there is a search bar with the text 'search' and a magnifying glass icon. Below the search bar is a table with the following data:

Name	Configured	Zero Suppressed
App group 1	No	
App group 2	No	
Customer Support	Yes	No

Below the table, there is a 'Display 5 records per page.' option. At the bottom of the page, there are three tabs: 'General', 'Application Thresholds', and 'Contact Group Thresholds'. The 'General' tab is selected. Below the tabs is an 'Edit' section for 'App group 2'. The 'Name' field contains 'App group 2'. The 'Active' field has two radio buttons: 'Yes' (unselected) and 'No' (selected).

Application Groups/Thresholds Page

Adding or Deleting an Application Group

New application groups must be added in Genesys Administrator. Adding and deleting application groups cannot be performed in the Advisors administration module. However, you can make an application group inactive or remove it from the Advisors configuration. To add a new application group in Genesys Administrator, or to delete an application group, see [Advisors Business Objects](#).

Configuring an Application Group's Attributes in Advisors

Use the **General** tab to maintain application groups.

To edit an application group's configuration attributes, select it in the upper panel and edit these details in the **Edit** panel. Alternatively, type the first few letters of its name in the **Search** field, click the icon beside the **Search** field, and then select from the list. When your edits are complete, click **Save**. The **Name** field cannot be edited. This value is configured in Genesys Administrator.

Complete the fields in the **Edit** panel as follows:

- **Active:** Select whether the status of the application group is active or inactive. The first time you make an application group active, it becomes part of the Advisors configuration. After this, you can use it to configure applications and contact groups. When you change such an application group to inactive, it remains available to use in configuration, and the configurations in which it is used do not change. However, CCAAdv and WA do not use the application group when calculating data for the dashboards.
- **Zero Suppressed:** Select Yes for application groups where little or no activity is expected. See [Zero Suppression](#) for details.

When you have made the **Edit** panel selections and saved them, the following happens:

- If the application group has been newly created in Genesys Administrator, the **Configured** field changes to Yes to indicate that the configuration is now complete on the Advisors side.
- An Updated Successfully message displays at the top of the page.
- The **Remove from Advisors configuration** button is activated.

Removing an Application Group from Advisors Configuration

To remove the application group from the Advisors configuration, click on the **Remove from Advisors Configuration** button. This removal is not synchronized back to Configuration Server.

Important

Before removing an application group from the Advisors configuration, you must remove its assignment from configured applications, configured contact groups, and distribution lists.

You cannot remove an application group if:

- A metric threshold is defined in the context of the application group.
- An active alert exists created by such a threshold.

Thresholds, Threshold Violations, and Alerts

Thresholds

You can create thresholds on a metric's value to alert users to unacceptable values of that metric.

The thresholds exist in the context of an application group. That is, for base objects related to one application group, the thresholds can be different than for another base object related to a different application group.

A threshold can have two or four values. The complete four values are low critical, low warning, high warning, and high critical. Either the two low thresholds can be empty, or the two high thresholds can be empty.

Threshold Violations

When a metric's value violates a threshold, the background to the metric's cell in the dashboard changes color. When a warning threshold is violated, the color is yellow. Violation of a critical threshold changes the color to red.

These threshold violations appear in the Applications pane of the CCAdv dashboard, and the Contact Groups pane of the WA dashboard.

They also appear in the Contact Centers pane in each dashboard. A violation appearing in the row for a business object in the Contact Centers pane means that an object related to that business object is reporting a threshold violation.

Alerts

A threshold violation escalates to an official *alert* when the metric's value remains above or below a threshold for a specific period of time. The duration to wait before creating an alert is set in the **System Configuration** page.

Alerts appear in the **Alerts** map and the **Alerts** pane in either dashboard, and in the **Alert Management** module.

Thresholds therefore drive alerts. Thresholds should be set carefully and periodically reviewed for tuning requirements. If a threshold is constantly in a violated state, then it is probably set too tight for the current capabilities of the operating environment. If, when an alert is triggered, no action will be taken or, at the least, no immediate value is delivered in knowing about that alert, it might be better to change the threshold or delete its values.

You cannot delete or reset a threshold's values if the threshold is currently causing an active alert. To end the alert and make it inactive, change the threshold's values so that the metric will no longer causes a violation. When the alert ends, and CCAdv or WA has deleted it from the Advisors database, you can reset the threshold or delete its values.

Configuring Thresholds

The **Application Groups/Thresholds** page allows you to:

- Define critical (red) thresholds, warning (yellow) thresholds, and normal conditions for each metric in the context of an application group, using the **Application Thresholds** tab.
- Define critical (red) thresholds, warning (yellow) thresholds, and normal conditions for each metric in the context of an application group, using the **Contact Group Thresholds** tab.

Important

Only metrics that have the **Threshold** checkbox selected on the **Report Metrics** page display in the **Thresholds** list.

The **Application Thresholds** page and the **Contact Group Thresholds** page display the threshold rule details including:

- **Metric:** Display name of the metric to which the threshold will be applied, when the metric belongs to an object related to the application group
- **Min** and **Max:** Minimum and maximum permissible values for the threshold. Change these in the **Report Metrics** page.
- **Decimal Places:** The number of decimal places that the metric's value will display. Set this in the **Report Metrics** page. This does not affect that values you enter for the threshold.
- **Lower-Bound Warning, Lower-Bound Critical, Upper-Bound Warning, Upper-Bound Critical:** The threshold limits for warning and critical violations. See **Adding or Updating Thresholds** for details.

Important

You cannot delete or reset a threshold's values if the threshold is causing an active alert, or caused an alert that is now expired but has not been deleted from the Advisors database. To end the alert and make it inactive, change the threshold's values so that the metric will no longer causes a violation. When the alert ends, and CCAAdv or WA has deleted it from the Advisors database, you can reset the threshold or delete its values.

- **# of Exceptions:** The number of exceptions.

Exceptions

You can add time-based alternative thresholds (that is, exceptions) for the calculation of violations to vary your performance objectives. To do this, see **Threshold Exceptions**.

System Maintenance of Expired Alerts

Contact Center Advisor XML Generator uses the following process to remove expired alerts from storage for currently active alerts:

- During every processing cycle for the Short time profile group, XML Generator examines threshold violations and alerts. It creates new alerts, updates alerts that existed previously, and ends (expires) alerts that are no longer being caused.
- Every hour on the hour, XML Generator deletes from the storage for current alerts in the Advisors database the alerts that it has set to expired, and also the manual alerts whose end time indicates they are expired.
- The alerts about threshold violations and offline peripherals are retained in storage for historical alerts for display in **Alert Management**.

Workforce Advisor uses the following process to remove expired alerts from the storage for currently active alerts:

- During every processing cycle, WA examines threshold violations and alerts. It creates new alerts, updates alerts that existed previously, and ends (expires) alerts that are no longer being caused.
- After WA has processed all the alerts in this way, it deletes from the storage for current alerts in the Advisors database the alerts that it has set to expired.
- The alerts are retained in storage for historical alerts for display in **Alert Management**.

Alerts and E-Mail Notifications

A threshold violation escalates to an official alert based on persistently remaining above or below the threshold target for a specific period of time. This is set on the **System Configuration** page. Two parameters are important for managing notifications:

- **Alert Creation Delay Interval:** Controls how many minutes a metric's value must exist in a state exceeding a threshold before Advisors creates an alert. Alerts about offline peripherals in Cisco ICM, and manual alerts, are an exception to this rate: they appear immediately.
- **Notification Refresh Rate:** Determines the frequency of sending e-mail messages about alerts. The delay prevents unnecessary repetition of alert messages. Every minute, Contact Center Advisor and Workforce Advisor checks for notifiable alerts and the time an e-mail about the alert was last sent. For each alert, if the time that the e-mail was last sent is older than the notification refresh rate, an e-mail is sent. E-mail about the alert is also sent if the priority of the alert has changed since the last e-mail message about the alert, independent of the refresh rate.

Typically an **Alert Creation Delay Interval** would be in the 10-30 minute range and is entirely dependent upon the urgency and severity of issues.

The **Notification Refresh Rate** may or may not be relevant. Many organizations send an e-mail notification only once. Others with critical performance targets might want to know if an alert is still active and prefer an updated e-mail. While these two configuration settings are very important to the notification function, *how* the root thresholds are set is the most important consideration.

The final variable in the notification process is **distribution lists**. Careful understanding of the goal(s) of the notification will influence successful use of alert notifications. E-mail notifications should be targeted to users that really need to know about a situation regardless of their location. The users are often responsible for taking the appropriate action to address the situation when time is of the essence.

Distribution lists can be set up to very accurately target the desired audience. The list can be based on the type of alert (business or technical), the severity of the alert (warning or critical), and the contact center and/or the application group related to the application or contact group whose metric value caused the alert. All of these variables allow for targeted e-mail notifications to just the right audience.

Some organizations might prefer to distribute yellow/cautionary alerts to a small group (sometimes one person) that is responsible for the individual business unit or location affected. If the alert hits a red/critical state, the distribution widens to all potentially affected sites, as well as up the management chain.

Distribution lists, like many other aspects of Advisors, will rarely perform well if kept static. The business environment changes; performance targets change; personnel change. Regular and periodic tuning is required to ensure optimal utilization of these and many other Advisors capabilities.

Genesys advises having a documented process that outlines and links the various Advisors capabilities and settings to the broader customer care operating model. A simple example of this would be to document the process flow and impact that the addition of a group of call queues would have on Advisors. Those queues would need to be mapped to an Application Group, and thresholds and notifications would be set.

Adding or Updating Thresholds

You can update the values for a threshold in Advisors. You can enter values for **Lower-Bound Critical** and **Lower-Bound Warning**, or **Upper-Bound Warning** and **Upper-Bound Critical**, or all four values.

Depending on the metric, the value may be acceptable above or below a certain value.

If for example, the threshold is defined with only **Upper-Bound Warning** of 50 and **Upper-Bound Critical** of 75, then a value between 50 and 75 triggers a warning. If the value is above 75, a critical violation is triggered.

If the threshold is defined with a only **Lower-Bound Warning** of 75 and **Lower-Bound Critical** of 70, then a value between 70 and 75 triggers a warning. If the value is below 70, a critical violation is triggered.

For a case in which all four values are set, the threshold values are defined to trigger if the value is below or above defined values. For example, values below 10 or above 90 might trigger a critical violation, values between 80 and 90 or between 10 and 20 trigger a warning violation, and values between 20 and 80 are acceptable.

Procedure: Update application or contact group thresholds

Steps

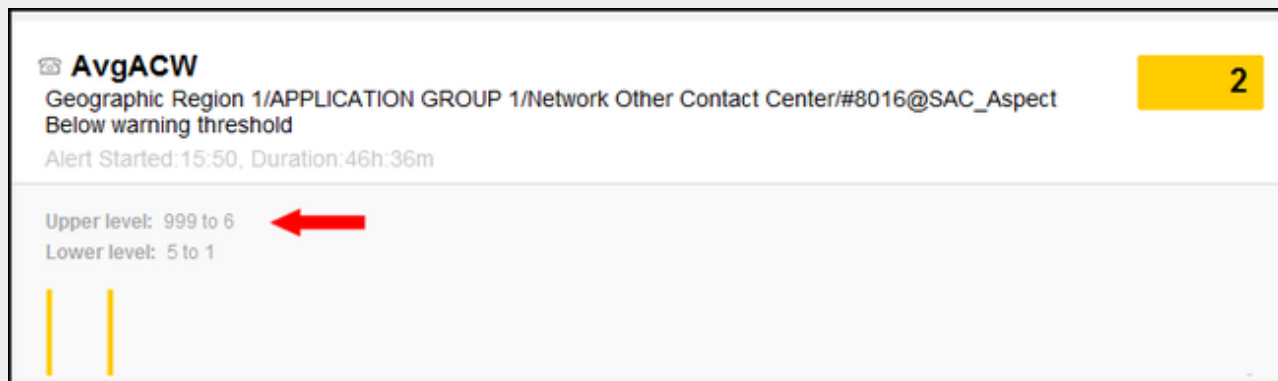
1. For CCAAdv, click the Application Thresholds tab. For WA, click the Contact Group Thresholds tab.
2. Select an application group.
3. In the Thresholds panel, select a metric to work with. If you do not see the metric you want, then its Threshold Applicable setting is not set to Yes. To set it, go to the [Report Metrics](#) page and change it there.
4. Type the values for the upper-bound and/or lower-bound limits for the selected metric. Your values are restricted by those in the Min and Max columns of the metric. To set new Min and Max values, go to the [Report Metrics](#) page and change them there.
5. To save the changes, click Save. A confirmation message displays. The values display on the **Thresholds** page.
6. Add any exceptions required. See [Adding Threshold Exceptions](#).

Important

You cannot delete or reset a threshold's values if the threshold is causing an active alert, or caused an alert that is now expired, but has not been deleted from the Advisors database. To end the alert and make it inactive, change the threshold's values so that the metric no longer causes a violation. When the alert ends, and CCAAdv or WA has deleted it from the Advisors database, you can reset the threshold or delete its values. See [Application Groups and Thresholds](#) for details. A section in that page describes how Advisors ends and then deletes active alerts.

Example: Working with thresholds

You can find the values for configured thresholds in the **Alerts** panel on the dashboard. The following Figure shows the location of threshold values on the panel.

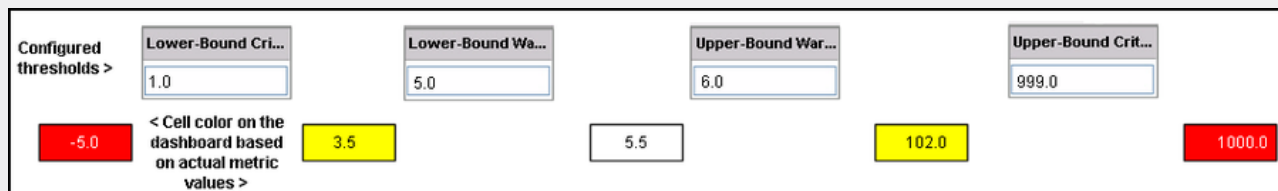


The lower level values shown on the **Alerts** panel correspond to the **Lower-Bound Critical** and **Lower-Bound Warning** values. The upper level values shown on the **Alerts** panel correspond to the **Upper-Bound Warning** and **Upper-Bound Critical** values. See the following Figure.

Lower-Bound Cri...	Lower-Bound Wa...	Upper-Bound War...	Upper-Bound Crit...
1	5	6	999

Threshold values entered on the **Application** tab

Based on the threshold values for the AvgACW metric, shown in the **Alerts** panel, cell color in the dashboard behaves as shown in the following Figure:



You can enter values for only the **Lower-Bound Critical** and **Lower-Bound Warning** thresholds:

Example: Working with thresholds

Lower-Bound Cri...	Lower-Bound Wa...	Upper-Bound War...	Upper-Bound Crit...
400	500		

Configured lower thresholds only

You can also enter values for only the **Upper-Bound Warning** and **Upper-Bound Critical** thresholds:

Lower-Bound Cri...	Lower-Bound Wa...	Upper-Bound War...	Upper-Bound Crit...
		-10.00	-5.50

Configured upper thresholds only

You cannot, however, enter values for only the **Lower-Bound Warning** and **Upper-Bound Warning** thresholds.

You can enter negative numbers for threshold values, however, they must be entered in increasing order from the lowest-level threshold you use to the uppermost-level you use. That is, if you enter values for all four thresholds (**Lower-Bound Critical**, **Lower-Bound Warning**, **Upper-Bound Warning**, and **Upper-Bound Critical**), then you would enter them as shown in the following example:

Lower-Bound Cri...	Lower-Bound Wa...	Upper-Bound War...	Upper-Bound Crit...
-1000	-900	-400	-300

Negative values configured for thresholds

Working with Threshold Exceptions

As part of the Advisor threshold and alert management capabilities, you can configure threshold exceptions. Exceptions are useful when certain periods of time perform differently than others. These differences are specific to the impact on threshold violations. For example, even though call volume fluctuates significantly throughout the day, expected performance should be maintained throughout the day.

Typically a metric target used for alerting (SL% for example) does not change just because other conditions change. However, certain conditions warrant exception usage as they are expected, understood and managed.

Many Advisor users have certain peak periods for which the organization does not try to staff. For example, every Monday from 09:00 to 11:00 a call spike occurs following the weekend. Since that spike is not staffed to deliver typical SL% performance, there is a weekly expected period where normal thresholds are consistently violated. An Advisor threshold exception is useful in this case to lower the targets for SL% and thus avoid threshold violations on the dashboard, alerts on the map, and e-mail notifications being sent.

Used correctly, threshold exceptions can avoid false alarms notifying people of a problem that does not really exist. If the situation is expected, known and accepted, then there should be no reason to alert on it. Alerting should be isolated to the intended purpose of bringing attention to an issue that requires action.

Operation

You can add exceptions to override baseline threshold rules. When the exception is in effect, the values for the thresholds specified in the exception are used to detect violations and create alerts.

Multiple thresholds may affect the same moment in time. Thresholds and exceptions behave as follows when multiple thresholds affect the same moment in time:

- The threshold that started later and ended earlier is the one in effect.
- Non-repeating exceptions override repeating ones.

Specifically, when multiple thresholds affect the same moment in time, thresholds and exceptions behave as follows:

- If more than one threshold affects the same moment in time, the threshold that started later applies.
 - If more than one threshold starts at the same time, then the one that ends the earliest applies.
 - If more than one exception starts and ends at the same time, then the single instance exception supersedes the repeating exception.
 - If more than one single instance exception starts and ends at the same time, then the exception created most recently applies.
 - If more than one repeating exception applies, then the repeating exception created most recently
-

applies.

The example in the following table describes which of the multiple thresholds apply at a given period of time.

Baseline Rule and Exceptions	Time Period	Threshold Applied
Baseline (00:00 - 24:00)	00:00–07:59	Baseline
A: 1/11/2006 08:00 - 10:00; created 1/10/2006 09:00:02 AM EST	08:00–08:44	Exception C
B: 1/11/2006 09:00 - 11:00; created 1/10/2006 10:00:02 AM EST	08:45–08:59	Exception A
C: 1/11/2006 08:00 - 08:45; created 1/10/2006 11:00:02 AM EST	09:00–10:59	Exception B
D: Repeat Weekly 09:00 - 13:00; created 1/8/2006 11:00:02 AM EST	11:00–12:59	Exception E
E: Repeat Monthly 09:00 - 13:00; created 1/9/2006 09:22:13 AM EST	13:00–23:59	Baseline

Threshold violations are raised as soon as they exist. For instance, from 07:55–08:50, assume a metric value is not in violation of the baseline threshold; however, it is a warning (yellow) violation according to Exception C. Therefore, the warning violation will occur at 08:00 and persist until 08:44 (assuming that Exception A is not a violation).

To determine when alerts are generated and displayed on the map and when e-mails are sent, the **Alert Creation Delay Interval** begins counting when the violation is raised. If the violation disappears before the threshold trigger delay because either the actual metric came back into compliance or the threshold changed, then an alert is not raised. If the violation changes (from yellow to red or red to yellow), either because the actual metric moved or the threshold changed, the trigger delay is calculated from when the metric first passed out of compliance (into yellow or red) and the alert, if generated, reflects the current state of the violation.

For exceptions, the start and stop time fields are relative to the contact center. The time zone is used to determine the times. For example:

- For contact centers in PST, typing the start time 6:00 AM and stop time 8:00 AM is 6:00 AM to 8:00 AM PST (that is, 14:00 -16:00 GMT).
- For contact centers in EST, typing the start time 6:00 AM and stop time 8:00 AM is 6:00 AM to 8:00 AM EST (that is, 11:00–13:00 GMT).

Important

You cannot delete an exception, or delete or reset its values, if the exception is causing an active alert, or caused an alert that is now expired but has not been deleted from the Advisors database. To end the alert and make it inactive, change the

exception's values so that the metric will no longer causes a violation. When the alert ends, and CCAAdv or WA has deleted it from the Advisors database, you can reset the threshold or delete its values.

Procedure: Adding or editing an exception

Steps

1. From the **Application Thresholds** or **Contact Groups Threshold** tabs, click on a live (blue underlined) link in the **# of Exceptions** column.
Note that there must be a threshold rule before an application or contact group can have an exception to the rule.
2. To add an exception, click **New**.
To edit an existing exception, select it, or search for and then select it in the upper pane.
3. Type or edit the name for the exception in the **Name** field.
4. Select the time zone from the drop-down field.
The values are converted to UTC prior to being saved in the database.
5. Enter the start time of the exception.
The start time must be less than the end time and range from 00:00 to 23:59.
6. Enter the end time of the exception.
The end time must be greater than the start time and range from 00:00 to 23:59.
7. Specify the date the exception applies from the **Effective Date** calendar.
8. Select the frequency that the exception repeats from the **Frequency** drop-down list. The default is None.
9. If the exception repeats weekly, select which day of the week the exception repeats.
10. If the exception repeats monthly, select which day of the month the exception repeats.
11. Add the lower-bound and upper-bound warning and critical threshold limits.
12. To save the exception, click **Save**.
A confirmation message displays. The exception displays in the table.

Contact Centers

This section describes how to configure contact centers. The following screenshot shows the **Contact Centers** page in the Administration module.

Contact Centers

Name ▲	Configured	Geographic Regions	Data Source	Type
Alexandria	Yes	Geo ABC	Other	Network
Denver	No			
El Paso	No			
Miami	No			
Orlando	No			

Display 5 records per page.

Edit

Name

* Open Time

* Close Time

Type Network ▼

* Effective Date

* Time Zone Pacific Time (US , Canada), Tijuana (GMT-07:00) ▼

Map Location (Latitude)

(Longitude)

* Data Source Other ▼

Expiration Date

Agent Groups
 Contact Centers

Name

Contact Centers Page

Adding or Deleting a Contact Center

New contact centers must be added in Genesys Administrator. Adding and deleting contact centers cannot be performed in the Advisors Administration module. However, you can make a contact center inactive, or remove the contact center from the Advisors configuration.

To add a new contact center or delete a contact center in Genesys Administrator, see [Advisors Business Objects](#).

Configuring the Attributes for a Contact Center in Advisors

See [Configuring Contact Centers](#).

Removing a Contact Center from Advisors Configuration

To remove the contact center from the Advisors configuration, click on the **Remove from Advisors Configuration** button. This removal is not synchronized back to Configuration Server. The contact center continues to be present in the contact center list, but displays as not configured and not active. The contact center completely disappears from the list only after it is deleted from Genesys Administrator.

Important

Before removing a contact center from the Advisors configuration, you must remove all other objects that are dependent on it.

Configuring Contact Centers

The **Contact Centers** page allows you to update contact centers. Multiple steps are required for contact centers to display on the dashboard.

There are three types of contact centers:

- **Site:** A location-based contact center.
- **Network:** A contact center for which an exact physical location cannot be specified. A network contact center can be divided into smaller units that represent one or more agent groups from the set of all agent groups belonging to the network contact center. Each such subset of agent groups is called an agent group contact center. In this case, the network contact center becomes a parent of one or more agent group contact centers.
- **Agent group:** A subset of agent groups from the set of all agent groups belonging to a network contact center.

Genesys recommends adding only one network contact center, and then adding agent-group contact centers to see a more granular view of your data. Because an agent group contact center can only be assigned to one network contact center, if more than one network contact center is created, you must add a second agent group contact center for each physical location.

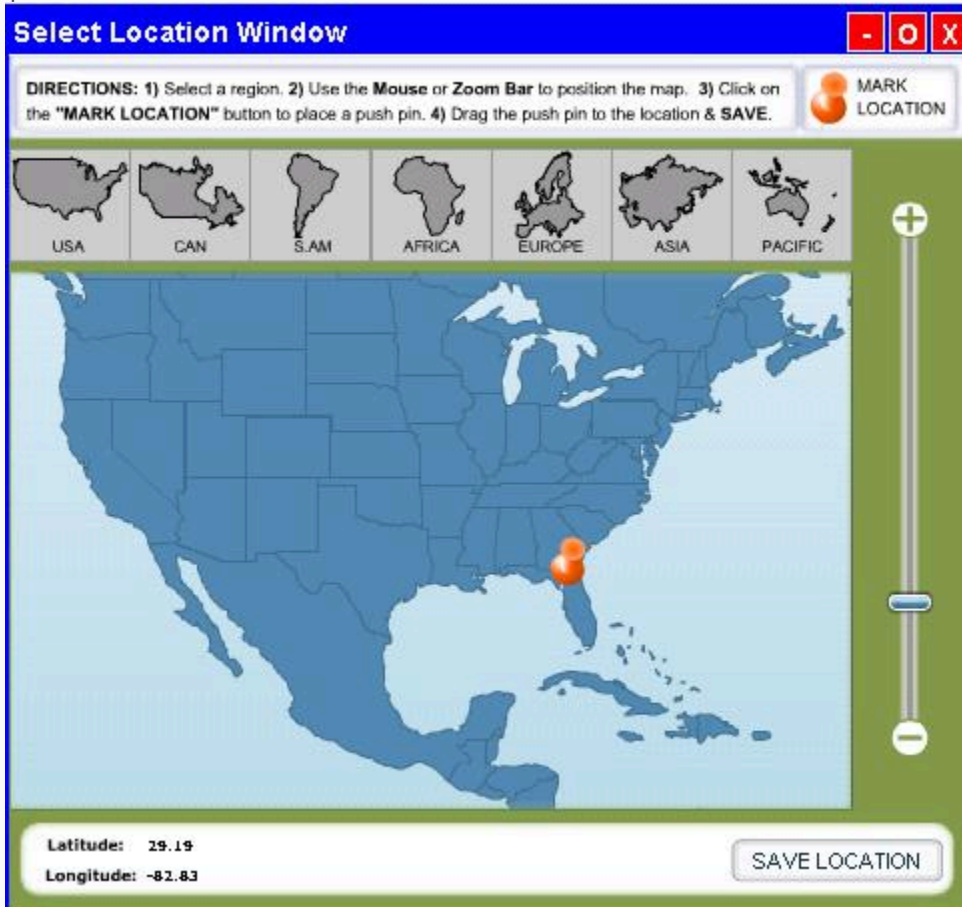
To receive e-mail about alerts concerning a contact center, the contact center must be assigned to distribution lists on the **Distribution Lists** page for users in that distribution list, and who have access to that contact center.

Procedure: Configure a Contact Center

Steps

1. On the navigation bar, select the **Contact Centers** page.
2. Select the contact center that you want to configure.
3. Select the time zone from the drop-down list.
4. To specify the hours of business operation, type the open and close times within the selected time zone.
The format is hh:mm.
The open and closed times represent the official time for active data analysis.
During non-operational hours, summaries that draw data from the contact centers (such as regional or application summaries) are calculated without that data. During non-operational hours, the contact center is hidden from the CCAdv contact centers pane and from the WA contact centers pane.

5. To set the location of the contact center on the map, type the decimal latitude and longitude or click the map icon. A network contact center does not require map coordinates, but it will not display on the map without them.
 - a. The mapping window opens as below. Instructions for using this map appear in the map pane.



Select Location Window

- b. Drag the map with the hand cursor to show more of it in the window.
 - c. Click the pushpin tool.
The pushpin displays on the map.
 - d. Drag the pushpin to the correct location.
 - e. Click the **Save Location** button. The mapping window closes.
6. To activate the contact center, click Yes for the **Active** button.
Selecting No deactivates the contact center and prevents it from displaying on the dashboard, which means you can set it up in advance.
7. Select the geographic region for the contact center from the drop-down list.

8. Enter the type of the contact center: **Site** or **Network**. This cannot be changed subsequently.
9. Choose the data source for the contact center. This cannot be changed subsequently. In the **Data Source** field, values are:
 - **Service**: for site contact centers
 - **Other**: for network contact centers
The value **Other** represents voice queues, interaction queues, calling lists, and call types.
10. To specify when a contact center displays and ceases to display, click the Calendar icons and select the **Effective Date** and the **Expiration Date**. The expiration date is optional.
11. For a network-type contact center, enter the agent-group contact centers with which it will be associated by clicking the plus icon beside the list of agent group contact centers.
12. To save the contact center, click **Save**.
A confirmation message displays and the contact center displays in the list.

Switches and Peripherals

A switch/peripheral is a communications interface between a call distributor and call router.

The following screenshot shows the **Switches/Peripherals** page in the Administration module.

Switches/Peripherals

search

Name	Assigned Contact Centers	Active
IxnSwitch		Yes
K-Worker		Yes
K-Worker Generic		Yes
LucentG3		Yes
Meridian		Yes

Display 5 records per page.

Details

Assigned Contact Centers

Active Yes

Save Reset

Switches/Peripherals Page

The **Switches/Peripherals** page displays both Cisco TDM logical interface controllers and Genesys switches.

Switches and peripherals are added automatically to Advisors when you run Contact Center Advisor XML Generator.

The **Switches/Peripherals** page allows you to make a switch or peripheral active or inactive as far as Advisors is concerned. This setting doesn't have any effect on the switch or peripheral.

Applications and agent groups related inactive switches/peripherals will not be used by Contact Center Advisor or Workforce Advisor.

The page also shows the contact centers related to the switch. An administrator assigns a switch/

peripheral to a contact center indirectly. The assignment happens when a user assigns an application to a contact center. If the application belongs to a switch/peripheral, the contact center appears on the **Switches/Peripherals** page as related to the corresponding switch/peripheral.

Procedure: Activate Switches and Peripherals

Steps

1. To make a switch or peripheral active or inactive:
 - a. Select from the list, or search and select, to display the details of a switch/peripheral.
 - b. Select Yes to activate the switch or peripheral, or No to make it inactive.
2. Click the **Save** button.
A confirmation message displays and the assignment and active status displays in the list.

Application Configuration

The **Application Configuration** page is used for configuration of:

- Rollups (or aggregations)
- Associations between applications and agent groups
- Details of applications

Application Configuration

Contact Center

SL Threshold Time

Application Group

Include in Rollup

Reporting Region

Zero Suppress

Operating Unit

Display on Dashboard

Rollups

Applications - Agent Groups

Application Details

Object Type Voice Queues Interaction Queues Call Types Services

🔍

Assigned Applications

<input type="checkbox"/>	Name ▲	Descriptive Na...	Contact Center	Application Gr...	Reporting Regi...	Operating Unit	SL Threshold ...	Inclu
<input type="checkbox"/>	238		Atwater	[ABC]	CAT	3G	20 sec	Yes
<input type="checkbox"/>	[defaultTenant] 7...		Austin	NewABC	CATexpansion	3Gexpansion	20 sec	Yes
<input type="checkbox"/>	[defaultTenant] 7...		Austin	NewABC	CATexpansion	3Gexpansion	20 sec	Yes
<input type="checkbox"/>	[defaultTenant] 7...		Austin	NewABC	CATexpansion	3Gexpansion	20 sec	Yes
<input type="checkbox"/>	Cafe		Atwater	[ABC]	CAT	3G	20 sec	Yes
<input type="checkbox"/>	Cafe2		Atwater	[ABC]	CAT	3G	20 sec	Yes
<input type="checkbox"/>			Atwater	[BMC]	CAT	3G	20 sec	Yes

Display records per page.

Assign Unassign

🔍

Available Applications

<input type="checkbox"/>	Name ▲	Object Type	Data Source Name	Genesys Switch	Genesys Ter
<input type="checkbox"/>	12345	Call Type	felix_awdb	N/A	N/A
<input type="checkbox"/>	238_Double_Dip	Call Type	felix_awdb	N/A	N/A
<input type="checkbox"/>	399_Double	Call Type	felix_awdb	N/A	N/A
<input type="checkbox"/>	8005552628	Call Type	felix_awdb	N/A	N/A
<input type="checkbox"/>	8005552356	Call Type	felix_awdb	N/A	N/A
<input type="checkbox"/>	8005557289	Call Type	felix_awdb	N/A	N/A

Display records per page.

Application Configuration Page

To configure the hierarchy displayed on the CCAdv dashboard and control how applications' metrics are rolled up, create associations between:

- Applications and the business objects that become the levels of the hierarchy in the Contact Centers

Contact Center Advisor and Workforce Advisor Administrator User's Guide

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pane

- Applications and agent groups

Access to applications and agent groups is not configured in Configuration Manager. Advisors users only have access or not to these objects indirectly, via access to business objects related to them. Data relating to or depending on objects to which users have no permissions will not be displayed.

Access to business objects must be configured by an administrator in Configuration Manager. Objects to which users have no permissions will not be displayed, either in this page or in the dashboard.

Applications are added to Advisors by being imported from external data sources, and cannot be deleted.

Application SL Threshold Time Setting Can Override the Time Range Setting

The **SL Threshold Time** set on the **Application Configuration** page overrides the **Time Range** setting at the application level for the default (out-of-box) Service Level metrics. The override is not applicable to custom Service Level metrics created for use in your enterprise. The Figure below shows the **Time Range** setting in the Report Metric Manager.

Notification Mode	Change Based	Insensitivity	0
Notification Frequency	0	Exclude Base Object Filter	<input type="checkbox"/>
Time Range Lower Bound	0	Time Range Upper Bound	20

Time Range Setting for Report Metrics

For information about changing the default Service Level threshold, see [Change the Default Service Level Threshold Setting](#), which includes the list of default Service Level metrics.

Rollups

The **Rollups** tab allows you to define how information displays, summarizes, expands, and contracts in the **Contact Centers** pane on the dashboard.

You assign a contact center, an application group, and a reporting region or operating unit to an application. These assignments are required for the application to display on the dashboard and to be included in the metric rollup for the specific grouping.

You have the option to do bulk configuration of rollup relationships for CCAAdv and WA. For information about bulk configuration, see the [Performance Management Advisors Deployment Guide](#).

Filtering the Display of Rollups

You can filter the list of objects in the **Rollups** display.

Filter by business object and other properties using the menus and the **Filter** button at the top of the page.

Filter by object type for a contact center using the check boxes that appear at the top of the **Rollups** tab.

- **Voice Queues:** For a Genesys data source, select the **Voice Queues** check box to display the voice queues.
- **Interaction Queues:** For a Genesys data source, select the **Interaction Queues** check box to display the interaction queues for chat and email.
- **Call Types:** For a CISCO data source, select the **Call Types** check box to display the call types.
- **Services:** For a CISCO data source, select the **Services** check box to display the services.

Sorting the Display of Rollups

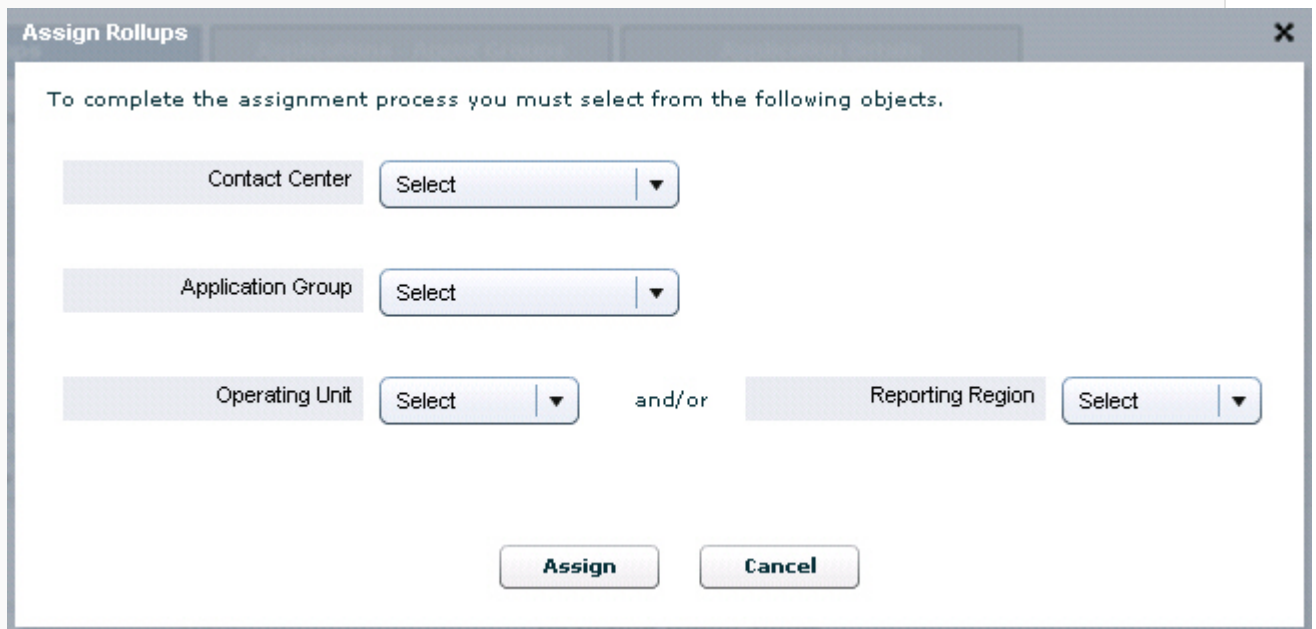
To sort the data in the **Rollup** table, click a column heading. The arrow in the down or up position indicates which column is sorted.

Working with Applications for Rollups

Procedure: Assign and Unassign Applications for Rollup

Steps

1. Select **Rollups**.
2. Use the filter buttons at the top of the page to filter the displayed list of records.
You cannot select an agent group contact center because you cannot assign an application to an agent-group contact center in the **Application > Rollups** tab. Agent group rollups are configured on the **Agent Group Configuration** page.
3. Select one or more applications from the **Available Applications** table by checking their check box(es).
4. Click the **Assign** button. The screenshot shows the **Assign Rollups** dialog.



The image shows a dialog box titled "Assign Rollups" with a close button (X) in the top right corner. The dialog contains the following text and controls:

To complete the assignment process you must select from the following objects.

Contact Center

Application Group

Operating Unit and/or Reporting Region

At the bottom of the dialog are two buttons: "Assign" and "Cancel".

Assign Rollups page

Tip

The **Assign Rollups** dialog does not appear if the required related business objects were already specified in the filter options. If only some of the mandatory objects are specified, then only the remaining missing ones need to be specified.

- a. Define the rollup by selecting the Contact Center, Application Groups, Operating Unit and/or Reporting Region for this application from the drop-down lists of options.

If you did not select a filter to display the data in the tables, the following defaults are applied:

- **SL Threshold Time:** 20 sec
- **Zero Suppress:** No
- **Display on Dashboard:** Yes
- **Include in Rollup:** Yes

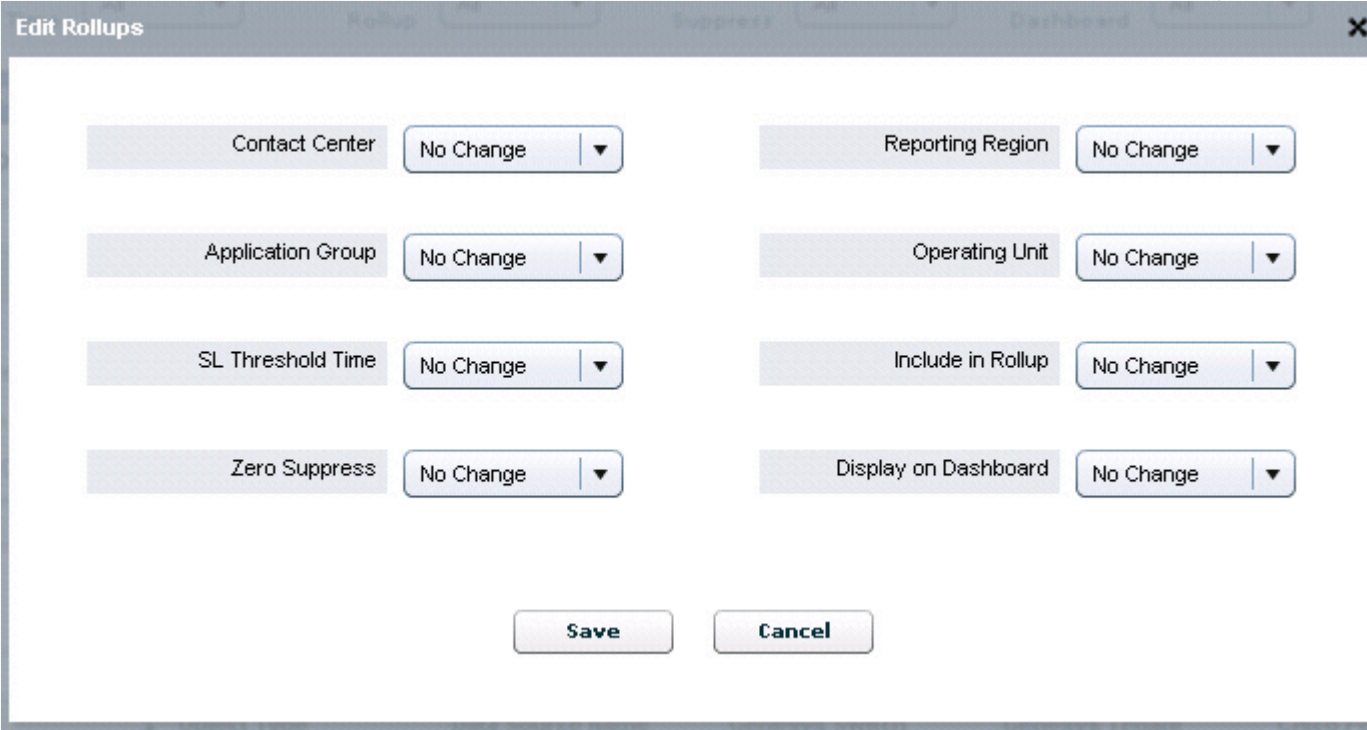
If you did select a filter, then the values in the filter are applied.

- b. Click **Assign** to save the changes.
5. To unassign an application, check its check box in the **Assigned** table, and click **Unassign**. No confirmation message is displayed.

Procedure: Edit an Application Rollup

Steps

1. Select **Rollups**.
2. Use the filter buttons at the top of the page to filter the displayed list of records.
You cannot select an agent group contact center because you cannot assign an application to an agent-group contact center here. To do this, go to the **Agent Group Configuration** page.
3. Select an application from **Available Applications** by checking its check box. You can select multiple applications in the same way. The changes you make will apply to all the applications you select. To navigate to the next or previous page use the page controls.
4. Click **Edit**.
5. Use the drop-down lists on the **Edit Rollups** dialog to specify a value for each of the following:
 - **Contact Center**
 - **Application Group**
 - **SL Threshold Time**
 - **Zero Suppress**
 - **Reporting Region**
 - **Operating Unit**
 - **SL Threshold Time**
 - **Include in Rollup**
 - **Zero Suppress**
 - **Display on Dashboard**



Edit Rollups page

If **Include in Rollup** is set to No and **Display on Dashboard** is set to Yes, the application's metrics values will not contribute to rolled up values, but the application will still appear in the **Applications** pane when you select the appropriate grouping.

Genesys recommends selecting No for **Include in Rollup** and Yes for **Display on Dashboard** only for IVR/VRU-related applications in which you want to display IVR performance in the **Applications** pane but not in the **Contact Centers** pane. The IVR should handle 100% of the calls and the performance could indicate whether or not this is happening or if there might be a problem. In this case, including these numbers in the rollup would inflate the performance of call handling by the agents.

For the violations triggered by threshold rules on an application's metrics to display on the dashboard, you must select Yes for **Include in Rollup**.

Applications – Agent Groups tab

For agent groups to display on the dashboard, the Application-to-Agent Group relationship must be created.

The **Applications-Agent Groups** tab allows you to maintain the associations between application and agent groups. The screenshot shows the **Applications - Agent Groups** tab.

Configuration Manager Business Attributes—Individual Objects

You can opt to display either descriptive or technical names of objects by clicking the **Display Descriptive Names** or **Display Technical Names** link.

To see the agent groups available to assign to an application, and those already assigned to it, select the application.

Only the agent groups from the same external data source display for the selected application.

From Cisco ICM, both base and non-base agent groups are imported. The enterprise name is used to distinguish agent groups with the same name, but from different peripherals.

You can reverse the order of display by selecting the relevant radio button. When the agent groups display in the left-most pane, then to see the applications available to assign to an agent group, and those already assigned to it, select the agent group.

Depending on how the application-to-agent groups relationship is defined in system configuration, you can map agent groups to applications manually or, if Auto Override mode is selected, automatically with Cisco ICM.

NEW Impact of Application-Agent Group Relationships on the CCAAdv Dashboard

Certain **specific dashboard functionality** is activated when you configure relationships between:

- agent groups and applications
- agent groups and application groups

An application-agent group relationship is created when you assign an agent group to an application.

An application group-agent group relationship is created when you:

- Assign an agent group to an application that is related to an application group.
- Assign an application group to an application that is related to an agent group.

To delete an application-agent group relationship, remove the agent group from the application.

To delete an application group-agent group relationship, do one of the following:

- Remove the application group from the application that is related to the agent group.
- Remove the agent group from the application that is related to the application group.

When the CCAAdv XML Generator starts, it checks for information about objects' relationships to agent groups. It also checks for updates to this information once every day, overnight. If a relationship is changed, and you do not want to wait overnight to obtain the results, then you – or an administrator with sufficient permissions – must restart the XML Generator.

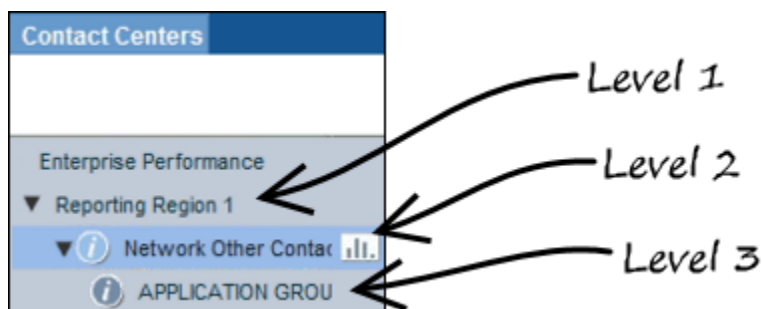
NEW Dashboard Functionality Dependent on Application-Agent Group Relationships

1. **Highlighting agent groups when applications are selected, and vice versa.**

Configuring correct relationships between applications and agent groups supports the following dashboard functionality: when a user selects an application, the dashboard highlights the associated agent groups. The reverse is also supported: when a user selects an agent group, the dashboard highlights the associated application.

If you change the relationships, the highlighting will not work as expected for the related objects until the XML Generator reads the updated relationship information.

NEW Dashboard Functionality Dependent on Application Group-Agent Group Relationships



Configuring relationships between application groups and agent groups determines which agent groups display in the **Agent Groups** pane when a user selects any kind of object at level 3 in the

Contact Centers pane. The figure shows the Contact Center Advisor **Contact Centers** pane, and identifies what we mean by levels 1, 2, and 3 in the hierarchy.

The type of object that displays at each level of the hierarchy is dependent on the hierarchical grouping that you selected at the top of the **Contact Centers** pane.

When a user selects an object of any kind at level 3 in the **Contact Centers** pane, the dashboard displays the agent groups associated with the contact center and application group that are part of that three-level hierarchy.

1. Displaying the set of agent groups related to both a contact center and an application group.

If you change the relationships between an application group and any of the agent groups, then the correct set of agent groups will not be displayed for the object at level 3 until XML Generator reads the updated relationship information.

In addition, if the primary CCAAdv XML Generator application stops running, and the backup application takes over processing, then no agent groups will be displayed for the object at level 3 until that backup XML Generator reads the relationships during the overnight refresh.

2. Deriving certain business objects metrics related to applications, where the metrics are based on agent group metrics.

If you change the relationships between an application group and any of the agent groups, then the correct set of agent groups will not be displayed for the object at level 3 until XML Generator reads the updated relationship information.

However, the correct set of agent groups will be used to derive the values of metrics that are based on the agent groups. Therefore, when you select a level-3 object in the **Contact Centers** pane, the values of metrics in the **Contact Centers** pane and the **Applications** pane can be inconsistent with the values displayed in the **Agent Groups** pane .

Maintaining Applications-Agent Groups Assignments

Multiple edits are not available for assigning agent groups to applications in the Administration module. You must edit individual applications to associate agent groups after creating the rollups.

Procedure:

Steps

1. Select the **Applications-Agent Groups** tab.
2. Select an application or agent group from the left panel. This displays the already assigned applications or agent groups in the **Assigned** panel on the right. Applications or agent groups that are available for assignment appear in the **Available** panel.
3. To move an object between the **Available** and **Assigned** panels, check its check box and click either the up or down arrow between the two panels.
4. Click **Save**.

Application Details

You use the **Application Details** tab to maintain all the details of an application other than its technical name. The screenshot shows the **Application Details** tab.

The screenshot displays the 'Application Details' tab with the following data:

Name	Descriptive Name	SL Threshold Time	Include in Rollup	Zero Suppress	Di
238		20 sec	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
[defaultTenant] 7...		20 sec	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
[defaultTenant] 7...		20 sec	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
[defaultTenant] 7...		20 sec	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Cafe		20 sec	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Cafe2		20 sec	<input checked="" type="checkbox"/>	<input type="checkbox"/>	

Name	Object Type	Data Source Name	Genesys Switch	Genesys Tenant	CISCO Per
[defaultTenant] 20001...	Voice Queue	Genesys	Meridian	defaultTenant	N/A
[defaultTenant] 20002...	Voice Queue	Genesys	Meridian	defaultTenant	N/A

Application Details tab

Procedure: Maintain application details

Steps

1. Click the **Application Details** tab.
2. Edit the details as follows:

- **Descriptive Name:** Descriptive names display on the dashboard. Hovering over the descriptive name displays the technical name.
- **SL Threshold Time:** Applicable only to ACD & Virtual queues from Genesys Stats Server. Select a value from the drop-down list. The list of available SL threshold times is predefined. To add additional entries to this list, new entries can be added to the platform database table SL_THRESHOLD.
- **Include in Rollup:** Check the box to include the application in rollups. In addition to this setting, the application must be *configured*, which means that it must be related to a contact center, application group, reporting region, and/or operating unit. See [Edit an Application Rollup](#) for further information on this option.
- **Zero Suppress:** Check the box to zero-suppress the application. (See [Zero Suppression](#).)
- **Display on Dashboard:** Check the box to display the application on the user dashboard. In addition to this setting, the application must be *configured*, which means it must be related to a contact center, application group, reporting region, and/or operating unit. See [Edit an Application Rollup](#) for further information on this option.

3. Click **Save**.

Removing Applications from CCAAdv/WA Configuration

As things change in your enterprise, you might find it necessary to remove certain specific applications from your Contact Center Advisor (CCAAdv) configuration.

The configuration mode that you use for CCAAdv/WA (integrated or independent) determines the impact of removing applications from your CCAAdv configuration:

- If you use the integrated configuration mode, changes you make to application configuration can vary, depending on the order in which you perform the steps required to remove (or to add) applications. To ensure you get the results you expect when removing applications, use the procedure on this page.
- Using the independent configuration mode, there are no dependencies between the CCAAdv and WA configuration. Removing applications from the CCAAdv configuration does not impact WA configuration.

Related Information

[Removing Agent Groups from CCAAdv/WA Configuration](#)

[Removing Contact Groups from WA Configuration](#)

Procedure Summary

The actions performed in the following procedure remove the application from the Advisors rollup configuration only and do not remove the object associated with this application (queue, service, call type, interaction queue, and so on) from the list of objects processed by the Genesys or CISCO Adapter.

To completely stop the processing of a Genesys object and its metrics by Advisors, the object's metadata must be removed from the Object Configuration User's permissions specified in the Advisors installation or from higher levels in the Genesys Configuration Server. All CISCO objects are pulled/processed as long as they are present in the metadata of the CISCO ICM database. Removing an object from the source – that is, from the permissions of the Object Configuration User or from higher levels in the Genesys Configuration Server, or from the metadata in the CISCO ICM database – will stop the processing of the object even if it is not removed from the Advisors rollup configuration.

Procedure: Removing Applications from CCAAdv/WA Configuration

Prerequisites

- If you use Contact Center Advisor and Workforce Advisor in the integrated configuration mode, be sure to review your configuration before proceeding with this procedure. See the notes in the [Implications for Workforce Advisor Configuration](#) section for information.

Steps

- Navigate to the **Application Configuration** page. The **Rollups** tab will open. Locate the application that you want to remove to make sure that it is present in the application rollup configuration. Use the **search** field to help you locate the specific application, if necessary.

You can remove the application from the **Rollups** tab as described in [Step 5](#), skipping Steps 2 to 4. However, if the application is later restored in the application rollup, then all application-agent group relationships that were present before the application was removed will be restored automatically in the Contact Center Advisor configuration. The corresponding details related to WA configuration are described in [Implications for Workforce Advisor Configuration](#).

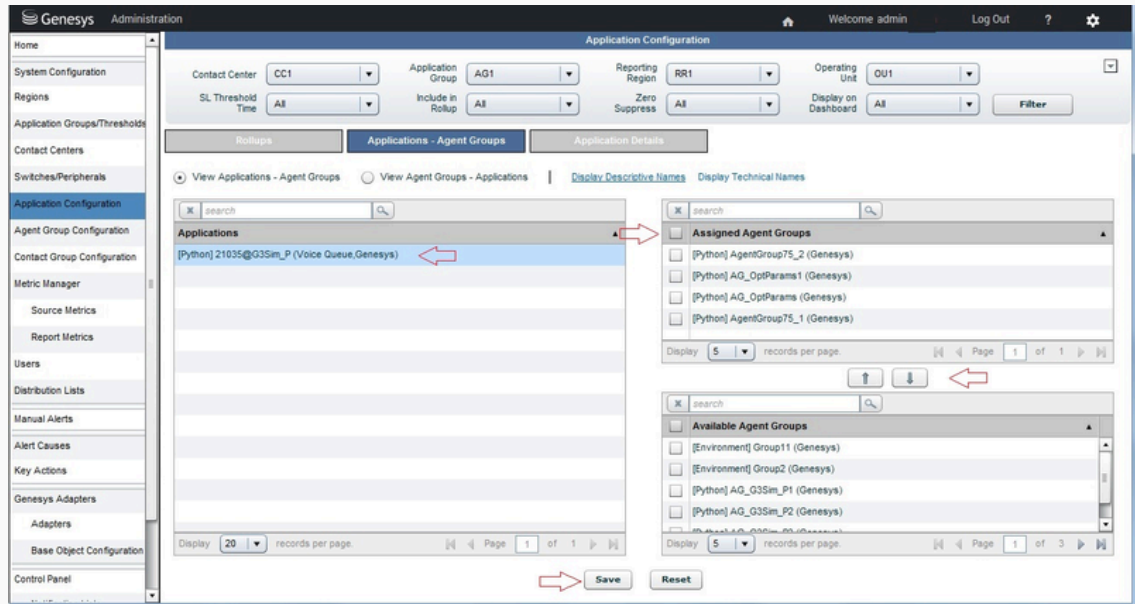
If you do not want any application-agent group relationships preserved, proceed to [Step 2](#) to explicitly remove the application-agent group relationships before removing the application itself.

- Open the **Applications - Agent Groups** tab on the **Application Configuration** page, and again locate the application that you want to remove.
- Remove all agent group assignments from the application:

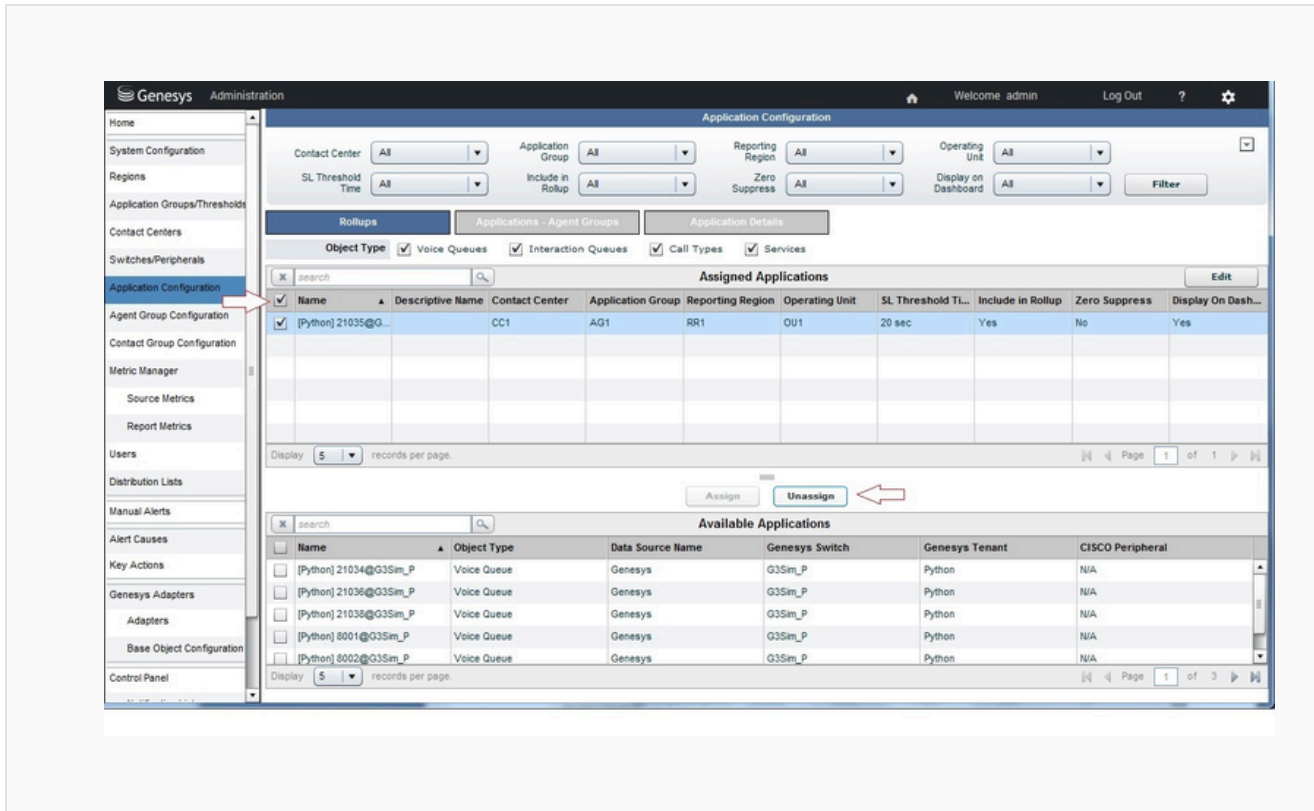
- a. Click on the application to select it.

All agent groups that are mapped to this application appear on the upper right pane under the **Assigned Agent Groups** label. For convenience, adjust the number of records per page so that all related agent groups are listed on one page.

- b. Select the **Select All** check box located near the **Assigned Agent Groups** label and click the arrow that moves the agent groups to the **Available Agent Groups** pane.
- c. Click **Save**.



4. Navigate to the **Rollups** tab again.
5. Select the application that you want to remove, and click the **Unassign** button.



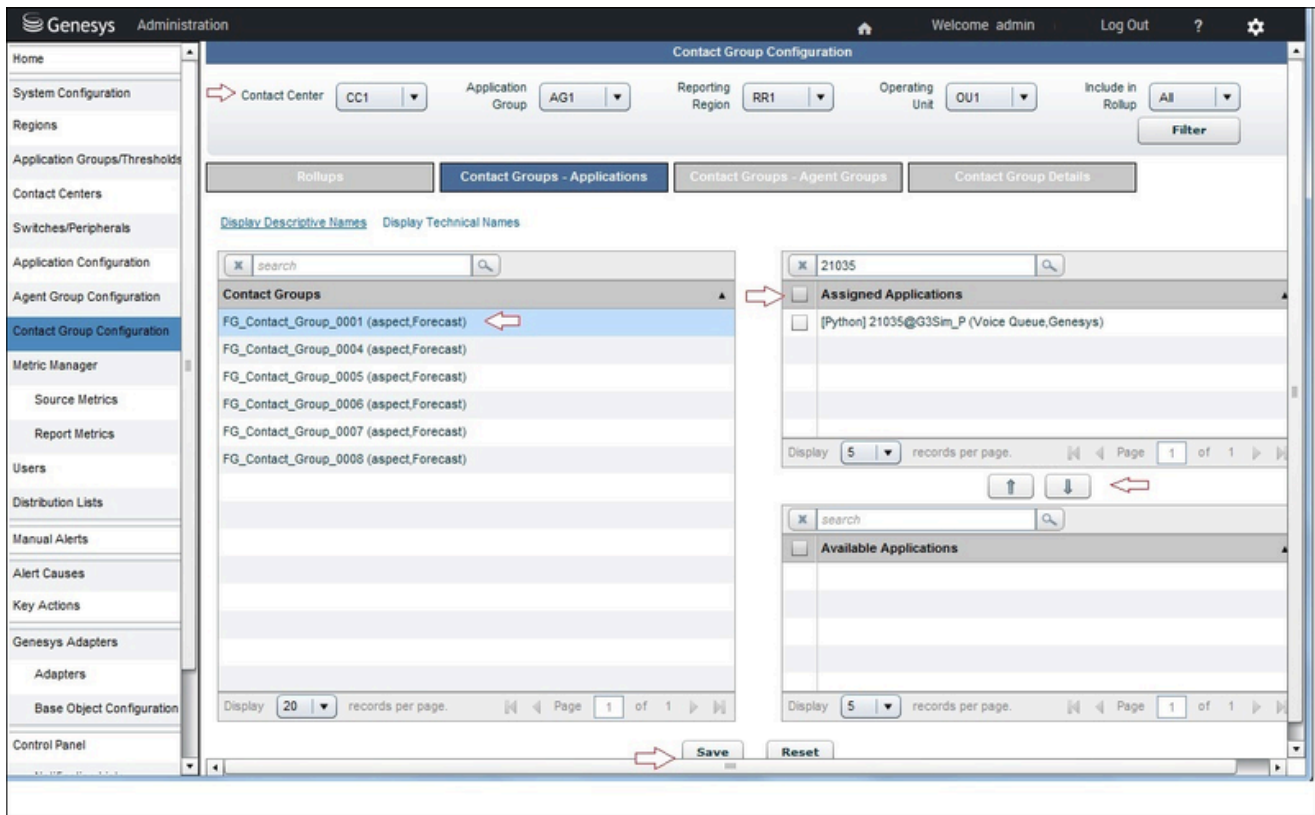
Implications for Workforce Advisor Configuration

If your Advisors application operates in the integrated configuration mode, Genesys recommends that you review your configuration before removing any applications to identify any possible impacts to the Workforce Advisor (WA) configuration.

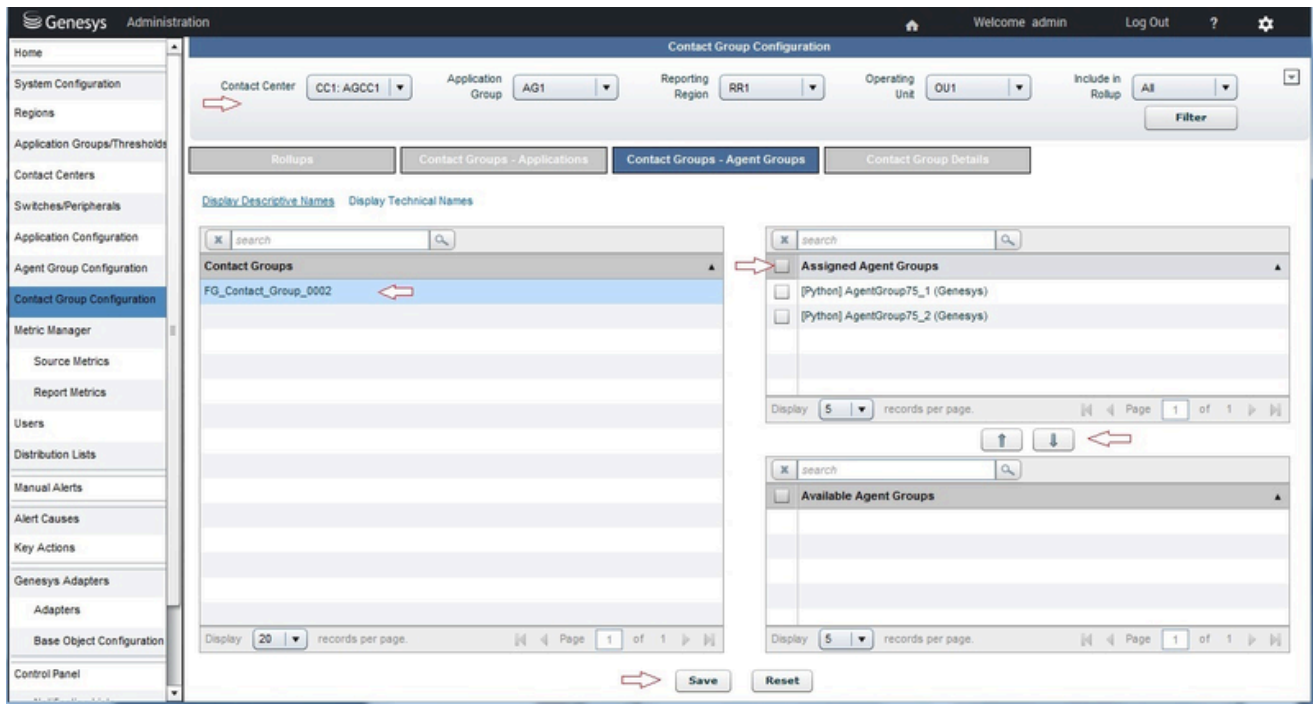
Removing an application from the CCAAdv configuration automatically removes, from all administration pages and dashboard views, any associations that exist between contact groups and applications and between contact groups and agent groups. However, if you do not remove such associations directly from the WA configuration, these associations between contact groups and applications and between contact groups and agent groups are preserved in the WA configuration, although they are not visible anywhere in the Advisors interface. Consequently, restoring the CCAAdv application configuration, exactly as it previously existed, automatically restores all contact group-application and contact group-agent group associations in the interface.

To prevent such configuration restoration, you must explicitly remove these associations from the WA **Contact Group Configuration** page, using the **Contact Groups - Applications** and **Contact Groups - Agent Groups** tabs. See the the following two figures for a sample **Contact Group Configuration** page.

Contact Group Configuration page, **Contact Groups - Applications** tab:

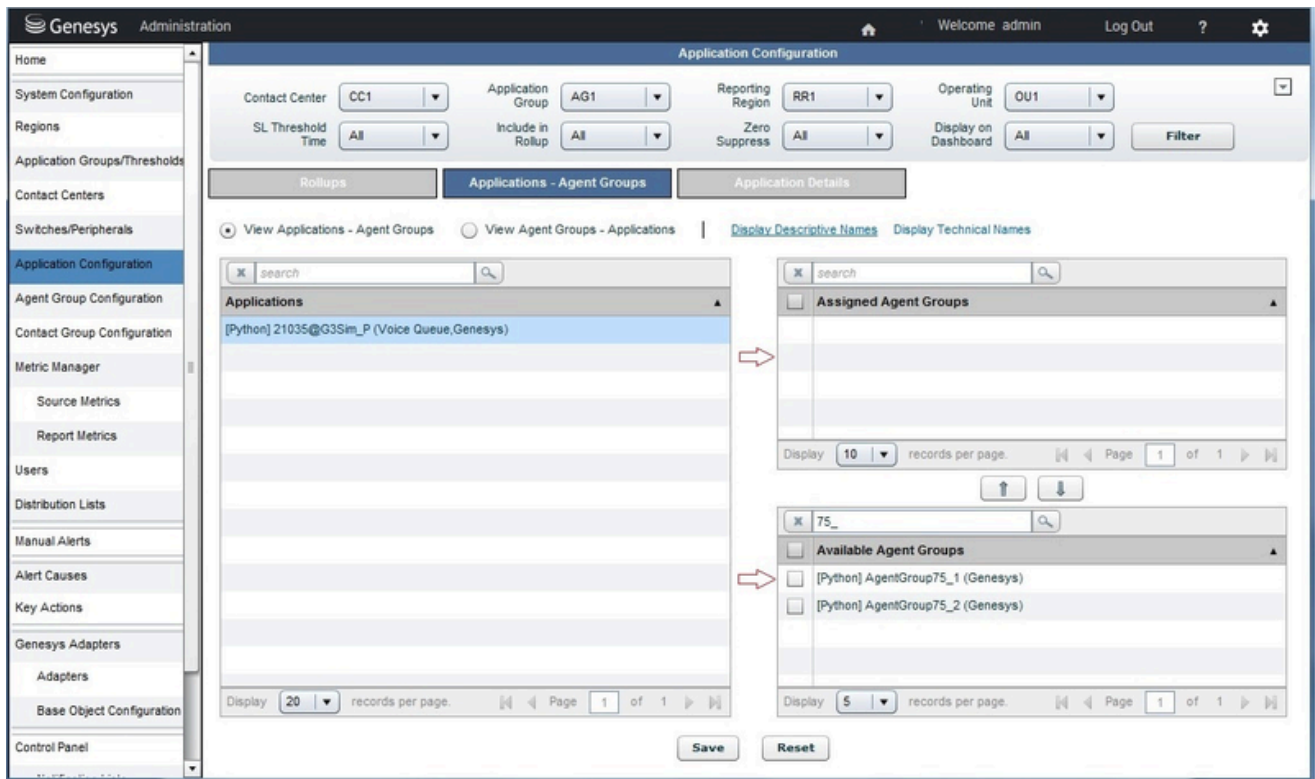


Contact Group Configuration page, Contact Groups - Agent Groups tab:



Implications for Agent Group Contact Centers

Moving an agent group from the **Assigned Agent Groups** pane to the **Available Agent Groups** pane on the **Application Configuration** page, and saving the result, removes all associations that previously existed between a specific application and the agent group, including the associations between the application and the agent group made through agent group contact centers.



Removing an application-agent group relationship does *not* remove the general association between that agent group and the agent group contact centers.

The screenshot shows the Genesys Administration console for Agent Group Configuration. The top navigation bar includes the Genesys logo, 'Administration', and user information 'Welcome admin' with a 'Log Out' link. The main content area is titled 'Agent Group Configuration' and features several filter dropdowns: Agent Group (CC1: AGCC), Application Group (All), Reporting Region (All), Operating Unit (All), Zero Suppress (All), Display on Dashboard (All), Include in CCAAdv (All), and Include in WA (All). A 'Filter' button is located to the right of these filters.

Below the filters, there are two tabs: 'Agent Group - Agent Group Contact Center' (selected) and 'Agent Group Details'. The 'Agent Group - Agent Group Contact Center' tab contains a search bar and a table titled 'Assigned Agent Groups'. The table has columns for Name, Agent Group Contact Center, Include in CCAAdv, and Include in WA. Two rows are visible, both for '[Python] AgentGroup75_1' and '[Python] AgentGroup75_2', with 'CC1: AGCC1' as the contact center and 'Yes' for both 'Include in CCAAdv' and 'Include in WA'. Below the table is a 'Display 5 records per page.' label and a pagination control showing 'Page 1 of 1'. There are 'Assign' and 'Unassign' buttons above the 'Available Agent Groups' table.

The 'Available Agent Groups' table has columns for Name, Tenant Name, and Data Source Name. It lists five agent groups: '[Environment] Group11' (Environment, Genesys), '[Environment] Group2' (Environment, Genesys), '[Python] AgentGroup_MultiMedia' (Python, Genesys), '[Python] AG_G3Sim_P1' (Python, Genesys), and '[Python] AG_G3Sim_P2' (Python, Genesys). Below this table is another 'Display 5 records per page.' label and a pagination control showing 'Page 1 of 3'.

After an application-agent group relationship is removed, be aware that the relationship will be reinstated if the application is later assigned to a network contact center to which the agent group is related through an agent group contact center; in this case, the agent group becomes automatically associated with the application again. The following figure shows you an example of what you would see on the dashboard when an association exists between an application and agent groups because of the agent groups' association with an agent group contact center:

The screenshot displays the Genesys Contact Center Advisor Performance Monitor interface. It is divided into several sections:

- Top Bar:** Includes the Genesys logo, 'Contact Center Advisor', user 'admin', and 'Last Updated: 03:58:51 PM 0'.
- Contact Centers Table:** A table with columns: Staffed, Talking, Queue, SL% Today, SL% 30m grov, SL% 5m skidin, and Abnd% 5m skidin. It shows data for Enterprise Performance, GR1, and AG1 (CC1, AGCC1, AGCC2).
- Map:** A map of the United States with red markers indicating agent locations. A tooltip for 'AGCC2' is visible, showing 'Offer at 2', 'Subject [Python] 21035@G3Sim_P', and 'Start Time 16:58:21'.
- Applications Table (AG1 : CC1):** A table with columns: Name, Staffed, Talking, Queue, SL% Today, SL% 30m grov, SL% 5m skidin, and Abnd% 5m skidin. It lists the application '[Python] 21035@G3Sim_P'.
- Agent Groups Table (AG1 : CC1):** A table with columns: Name, Agent Grou, LoggedOn, Talking, Avail, Wrap, and Rea. It includes a 'Totals and Averages' row and rows for Agent Gr1, Agent Gr2, Agent Gr3, and Agent Gr4.

Agent Group Configuration

Access in Advisors to agent groups is not configured in Configuration Manager. Advisors dashboard users only have access or not to these objects indirectly, through access to business objects related to them.

Adding/Deleting a New Agent Group in Genesys Administrator

Agent groups are added to Advisors by being imported from external data sources, and cannot be deleted.

Configuring Agent Group Attributes in Advisors

On the **Agent Group Configuration** page, you do the following:

- assign agent groups to agent group contact centers
- maintain agent group details

Assigning Agent Groups to Agent Group Contact Centers

The following screenshot shows the **Agent Group Contact Center** tab.

Agent Group Configuration

Agent Group Contact Center
 All ▼

Application Group
 All ▼

Reporting Region
 All ▼

Operating Unit
 All ▼

Zero Suppress
 All ▼

Display on Dashboard
 All ▼

Include in CCAAdv
 All ▼

Include in WA
 All ▼

Agent Group - Agent Group Contact Center

Agent Group Details

🔍

Assigned Agent Groups

<input type="checkbox"/>	Name ▲	Agent Group Contact Center	Include in CCAAdv	Include in WA
<input type="checkbox"/>	MANITOBA	AGCC_1	Yes	Yes
<input type="checkbox"/>	MANITOBA	AGCC_1	Yes	Yes
<input type="checkbox"/>	WINNIPEG	AGCC_1	Yes	Yes
<input type="checkbox"/>	WINNIPEG	AGCC_1	Yes	Yes
<input type="checkbox"/>	WINNIPEG	AGCC_1	Yes	Yes

Display records per page.
⏪ ⏩

Assign
Unassign

🔍

Available Agent Groups

<input type="checkbox"/>	Name ▲	Tenant Name	Data Source Name
<input type="checkbox"/>	[defaultTenant] AG-700	defaultTenant	Genesys
<input type="checkbox"/>	[defaultTenant] AG-700 Gold	defaultTenant	Genesys
<input type="checkbox"/>	[defaultTenant] AG_305	defaultTenant	Genesys

Display records per page.
⏪ ⏩ Pa

Agent Group Contact Center tab

To make agent groups available to assign to agent-group contact centers (AGCCs) on this page, the rollups for network contact centers must be configured first. To agent-group contact centers, you assign agent groups that are already related to a network contact center.

An agent group can be assigned to a network contact center through its association to applications on the **Applications Configuration** page. If an agent group is later removed from the association to the application, the association to the agent-group contact center is removed automatically.

An agent group can be assigned to more than one AGCC. If no contact centers are selected in the contact center drop-down list, the **Available Agent Group** pane shows all agent groups that are not associated with any AGCC. If a contact center is selected in the contact center drop-down list, the **Available Agent Group** pane shows all agent groups that are not associated with this particular contact center.

When you are using **independent configuration mode**, two options are available when making assignments:

- **Include in CCAAdv**
- **Include in WA**

You use these options to specify whether an agent group assigned to an agent group contact center (AGCC) participates in the CCAAdv and WA rollups. If you use CCAAdv and WA in integrated configuration mode, the default value for both options is Yes, and you cannot edit the options. If, however, you use CCAAdv and WA in independent configuration mode, you can specify to which application (CCAAdv or WA) to add the agent group and its associated AGCC.

Setting the **Include in WA** agent group rollup property to No automatically removes all mappings of contact groups to this agent group within the associated AGCC. Reverting the **Include in WA** rollup property to Yes restores previously-added mappings.

For more information about the CCAAdv/WA configuration modes, see [Configuration Modes](#).

The names of agent group contact centers display on the page with the corresponding network contact center name and use the format NCC Name: AGCC Name.

Procedure: Maintain Agent Groups-to-Agent Group Contact Center Assignments

Steps

1. Select the **Agent Group - Agent Group Contact Center** tab.
2. Use the filters in the uppermost panel to filter the display of assigned agent groups in the **Assigned Agent Groups** panel. To display all assigned agent groups, select **All**.

Tip

If you want to map an agent group to an AGCC, and this agent group is already mapped to an AGCC, select the contact center in the uppermost contact center drop-down list and click the **Filter** button to place the agent group onto the **Available** pane; then you can map it to the selected AGCC.

The display shows assigned agent groups and available agent groups.

3. Select an agent group from the **Available Agent Groups** pane, and click **Assign**. The **Assign Rollups** window opens.
4. Select the agent group contact center from the drop-down list. If you use CCAAdv and WA in integrated configuration mode, the **Include in CCAAdv** and **Include**

in WA rollup options are grayed out. If you use CCAdv and WA in independent configuration mode, specify whether the agent group should be included in the CCAdv and/or WA rollups. Select Yes to include it in the rollup, and No to exclude it from contributing to rollup information in the relevant application.

5. Click **Assign**.

Procedure: Edit an Agent Group Assignment

Steps

1. Select the **Agent Group - Agent Group Contact Center** tab.
2. Select an assigned agent group from the list by selecting the check box.
You can select multiple agent groups for edit, but the changes you make will apply to all selected applications.
3. Click **Edit**.
4. Select a new Agent Group Contact Center from the drop-down list, or change your selection to include or exclude the agent group from CCAdv or WA rollups.
The **Include in CCAdv** and **Include in WA** options are grayed out if you use integrated configuration mode.
5. Click **Save**.

Maintaining Agent Group Details

The **Agent Group Details** tab allows you to maintain details of agent groups, apart from their primary name. The following screenshot shows the **Agent Groups Details** tab.

Agent Group Configuration

Contact Center

Application Group

Reporting Region

Operating Unit

Zero Suppress

Display on Dashboard

Include in CCAAdv

Include in WA

Agent Group - Agent Group Contact Center

Agent Group Details

Assigned Agent Groups

Name ▲	Descriptive Name	Zero Suppress	Display on Dashboard
[defaultTenant] AG-700	<input style="width: 100%;" type="text"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
[defaultTenant] AG-700 Gold	<input style="width: 100%;" type="text"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
[defaultTenant] AG_305	<input style="width: 100%;" type="text"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
[defaultTenant] AG_4300_LT	<input style="width: 100%;" type="text"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
[defaultTenant] AG2test	<input style="width: 100%;" type="text"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

Display records per page.
Page of 11

Available Agent Groups

Name ▲	Tenant Name	Data Source Name
[defaultTenant] AGtest	defaultTenant	Genesys
[defaultTenant] team1	defaultTenant	Genesys

Display records per page.
Page of 11

Agent Group Details tab

Procedure: Maintain Agent Group Details

Purpose: To maintain details of agent groups, including determining which agent groups can display in the **Agent Groups** pane on the dashboard.

Steps

1. Select the **Agent Group Details** tab.
2. Use the filters in the uppermost panel to filter the display of agent groups.

Filters on the **Agent Group Details** tab are used exclusively to narrow down the list of agent groups; the filters do not restrict the range of updates or changes you make on the tab. All changes you make to agent group properties on this tab are Advisors-wide; for example, an agent group displays the same descriptive name throughout WA and CCAdv even if it is mapped to multiple aggregated objects. The same applies to **Zero Suppress** and **Display on Dashboard** properties: either an agent group is suppressed/hidden or it is not suppressed/not hidden in any view.

3. Select an agent group from the list.
4. Type a descriptive name in the **Descriptive Name** field.
The descriptive name will display on the dashboard. If a descriptive name is not provided, the generated name displays on the dashboard.
5. To prevent an agent group from displaying on the dashboard when no current call activity exists, select Yes for **Zero Suppress**. See [Zero Suppression](#) for details.
6. To make the agent group display on the dashboard, select **Display on Dashboard**.
7. Click **Save**.
A confirmation message displays.

Removing Agent Groups from CCAAdv/WA Configuration

As things change in your enterprise, you might find it necessary to remove certain specific agent groups from your Contact Center Advisor/Workforce Advisor configuration.

The configuration mode that you use for CCAAdv/WA (integrated or independent) determines the impact of removing agent groups from your CCAAdv configuration:

- Using the integrated configuration mode, changes to the CCAAdv agent group configuration are reflected automatically in the configuration of all WA contact groups that are mapped to applications that are, in turn, associated with the agent groups that you deleted (or added). If you use the integrated configuration mode, changes you make to agent group configuration can vary, depending on the order in which you perform the steps required to remove (or to add) agent groups. To ensure you get the results you expect when removing agent groups, use the procedure on this page.
- Using the independent configuration mode, there are no dependencies between the CCAAdv and WA configuration. Removing agent groups from the CCAAdv configuration does not impact WA configuration, and removing agent groups from the WA configuration does not impact CCAAdv configuration.

Related Information

[Removing Applications from CCAAdv/WA Configuration](#)

[Removing Contact Groups from WA Configuration](#)

Procedure Summary

The actions performed in the following procedure remove the agent group only from the Advisors rollup configuration and do not remove the agent group object from the list of objects processed by the Genesys or CISCO Adapter.

To completely stop the processing of a Genesys object and its metrics by Advisors, the object's metadata must be removed from the Object Configuration User's permissions specified in the Advisors installation or from higher levels in the Genesys Configuration Server. All CISCO objects are pulled/processed as long as they are present in the metadata of the CISCO ICM database. Removing an object from the source - that is, from the permissions of the Object Configuration User or from higher levels in the Genesys Configuration Server, or from the metadata in the CISCO ICM database - will stop the processing of the object even if it is not removed from the Advisors rollup configuration.

Procedure: Removing Agent Groups from your CCAdv/WA Configuration

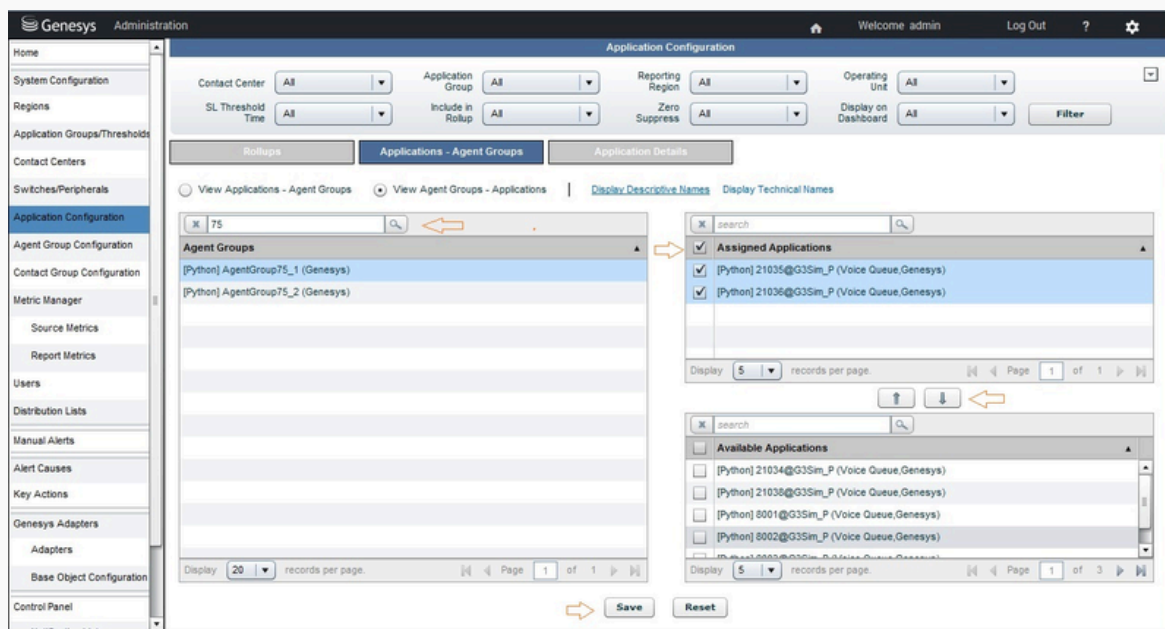
Steps

1. Navigate to the **Application Configuration** page, **Applications-Agent Groups** tab.
2. Locate the agent group that you want to remove.

Select the **View Agent Groups-Applications** radio button and use the **search** field to help you locate the specific agent group.

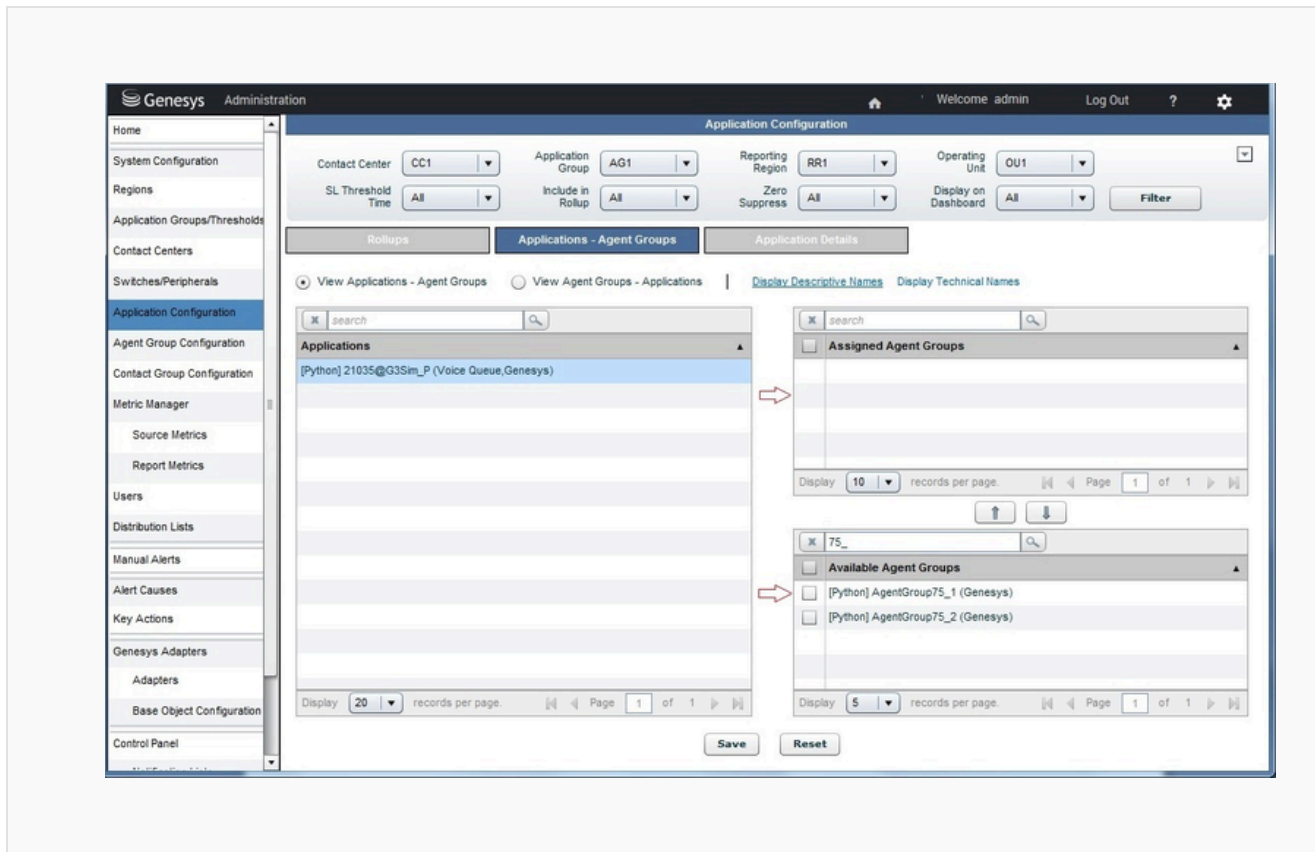
3. Remove all application assignments from the agent group:
 - a. Click on the agent group to select it.
All applications that are related to the agent group will display in the **Assigned Applications** pane.
 - b. Select all of the applications in the **Assigned Applications** pane.
 - c. Click the arrow between the panes to move the applications to the **Available Applications** pane.

The following figure demonstrates this action in a sample environment.



4. Click **Save**.

In the following figure, the **View Applications-Agent Groups** radio button is selected. One of the applications that was removed from the agent group in [Step 3](#) is selected. This view of that application's configuration shows that the agent group has been moved from the list of *assigned* agent groups to the list of *available* agent groups. The agent group is now removed from the configuration.



Preventing Unplanned Associations between Agent Groups and Applications

Moving an agent group from the **Assigned Agent Groups** pane to the **Available Agent Groups** pane on the **Application Configuration** page, and saving the result, removes all associations that previously existed between a specific application and the agent group, including the associations between the application and the agent group made through agent group contact centers. Removing an application-agent group relationship does not remove the general association between that agent group and agent group contact centers.

The screenshot displays the Genesys Administration console for Agent Group Configuration. At the top, there are filters for Agent Group (CC1: AGCC), Application Group (All), Reporting Region (All), Operating Unit (All), Zero Suppress (All), Display on Dashboard (All), Include in CCAdv (All), and Include in WA (All). Below these filters, the 'Agent Group - Agent Group Contact Center' section is active, showing 'Assigned Agent Groups' and 'Available Agent Groups' tables.

Assigned Agent Groups Table:

Name	Agent Group Contact Center	Include in CCAdv	Include in WA
[Python] AgentGroup75_1	CC1: AGCC1	Yes	Yes
[Python] AgentGroup75_2	CC1: AGCC1	Yes	Yes

Available Agent Groups Table:

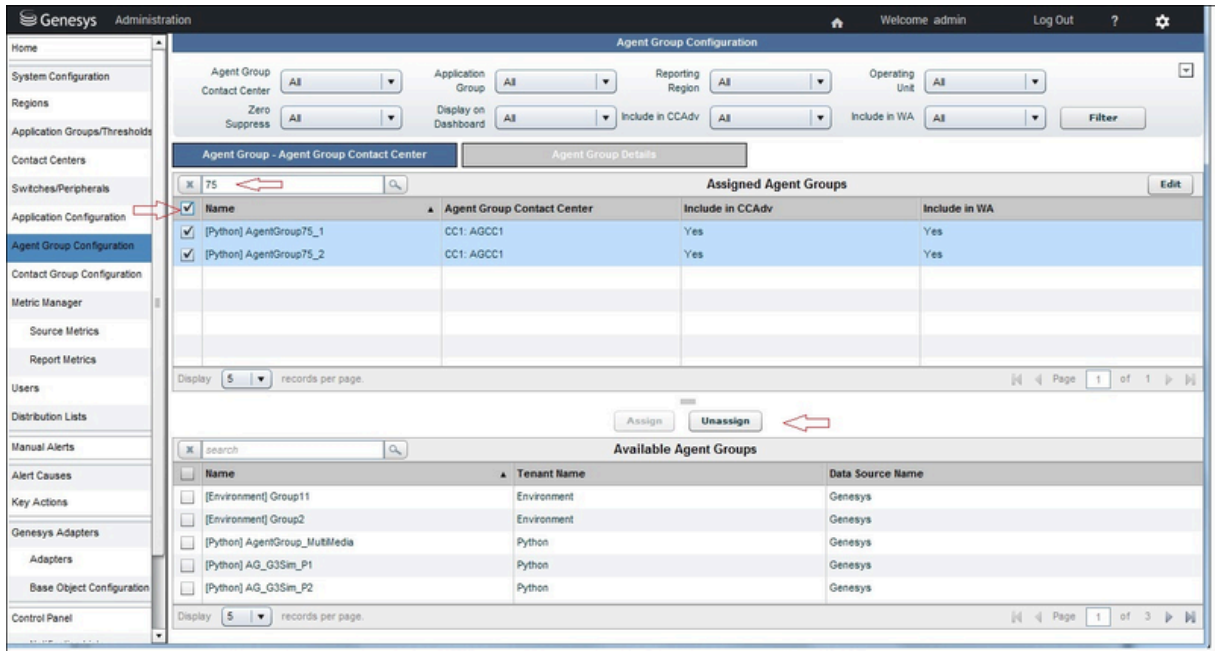
Name	Tenant Name	Data Source Name
[Environment] Group11	Environment	Genesys
[Environment] Group2	Environment	Genesys
[Python] AgentGroup_MultiMedia	Python	Genesys
[Python] AG_G3Sim_P1	Python	Genesys
[Python] AG_G3Sim_P2	Python	Genesys

After an application-agent group relationship is removed, be aware that the relationship will be reinstated if the application is later assigned to a network contact center to which the agent group is related through an agent group contact center; in this case, the agent group becomes automatically associated with the application again. This is true for the integrated configuration mode and for the independent configuration mode when the **Include in CCAdv** property is set to Yes.

To prevent the automatic association of the agent group with applications through an agent group contact center to which the agent group is assigned, you can do one of the following:

1. Remove the agent group from the agent group contact center:
 - a. Locate and select each agent group that you want to remove.
 - b. Click **Unassign**.

The following figure demonstrates this procedure.



2. If the Advisors application operates in the independent configuration mode, then you also have the option to edit the agent group **Include in CCAdv** property. Set this property to No to prevent the automatic association of this agent group with applications through a related agent group contact center.

Implications of Removing Agent Groups from an Agent Group Contact Center

Unassigning an agent group from an agent group contact center triggers the removal of associations between the agent group and applications if the association existed because of the relationship of both to a specific agent group contact center. This is true for the relationship between agent groups and contact groups, as well. If you remove an agent group from an agent group contact center, then any associations the agent group has with contact groups through that agent group contact center are also removed.

Implications of Restoring Associations Between Agent Groups and Agent Group Contact Centers

Restoring an association between an agent group and an agent group contact center also restores the associations between that agent group and any applications that are associated with that same agent group contact center; however, this is applicable only if the CCAdv application rollup remains configured as it was prior to the removal of the agent group from the agent group contact center.

Restoring the association between the agent group and the agent group contact center also restores the associations between the agent group and any contact groups that are associated with the agent group contact center; however, this is applicable only when all of the following criteria are met:

- a Contact Center Advisor application is configured, which is related to the agent group contact center
- the application remains associated with the contact group
- the agent group was not removed from the Workforce Advisor configuration

Removing an Agent Group Contact Center from Advisors Configuration

You can remove an agent group contact center from the Advisors configuration only after all agent groups and all contact groups are no longer mapped to it. To remove the assignments, you must perform the steps in the following order:

1. Unassign agent groups from applications on the **Application Configuration** page.
2. Check your **distribution lists**. If the agent group contact center is included in a distribution list, then you must remove it.
3. Unassign agent groups from the agent group contact center on the **Agent Group Configuration** page.
4. Unassign contact groups from the agent group contact center on the **Contact Group Configuration** page.
5. See information in [Removing a Contact Center from Advisors Configuration](#) to remove the agent group contact center.

Contact Group Configuration

In Advisors, the term *contact group* means a forecasting entity from a workforce management system. These are activities in Genesys WFM, forecast groups and staff groups in Aspect eWorkforce Management, and contact types in IEX TotalView.

To configure the hierarchy displayed on the WA dashboard and control how contact groups' metrics are rolled up, create associations between:

- Contact groups and the business objects that become the levels of the hierarchy in the **Contact Centers** pane
- Contact groups and applications
- Contact groups and agent groups

Access in Advisors to contact groups is not configured in Configuration Manager. Advisors users only have access or not to them indirectly, through access to business objects related to them.

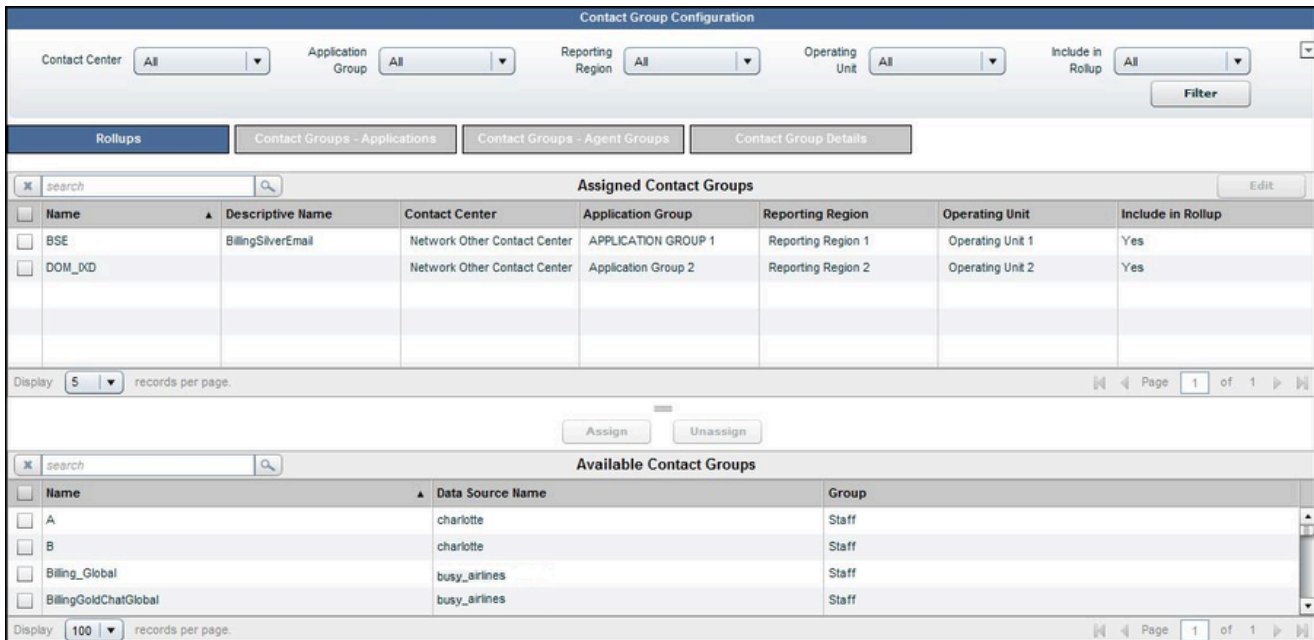
Access to business objects that form levels in the hierarchy on the WA dashboard must be configured by an administrator in Configuration Manager. Objects and data relating to or depending on objects to which users have no permissions will not be displayed, either in the dashboard or on this page.

If contact groups do not appear or do not update on the **Contact Group Configuration** page in the Administration module, see the [section on importing contact groups](#) in the *Performance Management Advisors Deployment Guide*.

Contact Group Configuration Page

To configure contact groups, use the **Contact Groups Configuration** page. It has four tabs:

- **Rollups**: create aggregations; that is, create associations between contact groups and business objects – contact centers, application groups, and reporting regions or operating units.
- **Contact Groups - Applications**: create associations between contact groups and applications from Genesys Stats Server or CISCO ICM.
- **Contact Groups - Agent Groups**: create associations between contact groups and agent groups from Genesys Stats Server or CISCO ICM.
- Details of contact groups.



Rollups Tab

The **Rollups** tab allows you to define how information displays, summarizes, expands, and contracts in the **Contact Centers** pane on the dashboard.

To configure a contact group, assign a contact center, an application group, and a reporting region or operating unit to it. These assignments are required for the contact group to display on the dashboard and to be included in the metric rollup for the specific grouping.

You have the option to do bulk configuration of rollup relationships for CCAAdv and WA. For information about bulk configuration, see information about bulk configuration in the *Performance Management Advisers Deployment Guide*.

Important

WA does not control the data source names; if data source names are the same, but one is in lower case and the other is in upper case, then WA interprets them as two different data source names. For more information on data source names, see the [section on importing contact groups](#) in the *Performance Management Advisers Deployment Guide*.

Filtering the Display of Rollups

You can filter the list of objects in the **Rollups** display.

Filter by business object and other properties using the menus and the **Filter** button at the top of the page.

Sorting the Display of Rollups

To sort the data in the **Rollups** table, click on a column heading. The arrow in the down or up position indicates which column is sorted.

Working with Contact Groups for Rollup

Procedure: Assign Contact Groups for Rollup

Steps

1. Select the **Rollups** tab.
The following screenshot shows the **Rollups** tab in the **Contact Group Configuration** page.

Assigned Contact Groups						
Name	Descriptive Name	Contact Center	Application Group	Reporting Region	Operating Unit	Include in Rollup
<input type="checkbox"/> BSE	BillingSilverEmail	Network Other Contact Center	APPLICATION GROUP 1	Reporting Region 1	Operating Unit 1	Yes
<input type="checkbox"/> DOM_XD		Network Other Contact Center	Application Group 2	Reporting Region 2	Operating Unit 2	Yes

Available Contact Groups		
Name	Data Source Name	Group
<input type="checkbox"/> A	charlotte	Staff
<input type="checkbox"/> B	charlotte	Staff
<input type="checkbox"/> Billing_Global	busy_airlines	Staff
<input type="checkbox"/> BillingGoldChatGlobal	busy_airlines	Staff

2. Select a contact group from the **Available Contact Groups** pane by selecting its check box. You can select multiple contact groups in the same way. The changes you make will apply to all those you select. To navigate to the next or previous page, use the page controls.
3. To associate the contact group for rollup, click **Assign**. The **Assign Rollups** pane displays.

Assign Rollups

To complete the assignment process you must select from the following objects.

Contact Center

Application Group

Operating Unit and/or Reporting Region

Assign **Cancel**

Assign Rollups page

The **Assign Rollups** dialog does not appear if the required related business objects were already specified in the filter options. If only some of the mandatory objects are specified, then only the remaining missing ones need to be specified.

4. Define the rollup by selecting a contact center, application group, reporting region, and/or operating unit for the contract group.
If you did not select a filter to display the data in the tables, the following defaults are applied:

- **Include in Rollup:** Yes

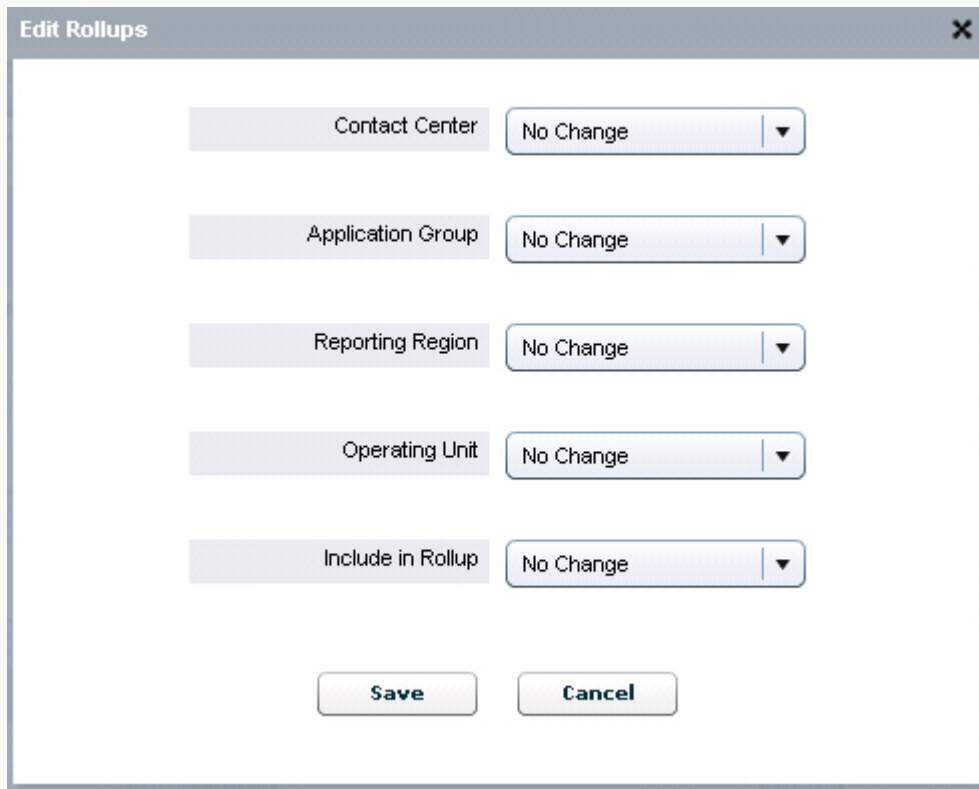
If you did select a filter, then the values in the filter are applied.

5. Click **Assign**. The **Assign Rollups** dialog box closes.
6. In the main **Rollups** tab, a confirmation message displays and the details display in the table.

Procedure: Edit a Contact Group Rollup

Steps

1. Select **Rollups**.
2. Select one or more contact centers from the list.
3. Click **Edit**.



The screenshot shows a dialog box titled "Edit Rollups" with a close button (X) in the top right corner. The dialog contains five rows of configuration options, each with a label and a dropdown menu set to "No Change":

- Contact Center
- Application Group
- Reporting Region
- Operating Unit
- Include in Rollup

At the bottom of the dialog are two buttons: "Save" and "Cancel".

Contact Groups Edit page

4. Edit the rollup by selecting a contact center, application group, reporting region, and/or operating unit.
5. To roll up the metric values of a contact group to an application group, contact center, regional level, or enterprise level, select Yes for the **Include in Rollup** parameter. Selecting No for **Include in Rollup** excludes the values from the WA rollup. For the violations triggered by threshold rules on a contact group's metrics to display on the dashboard, you must select Yes for **Include in Rollup**.
6. Click **Save**.

Contact Groups – Applications

Use the **Contact Groups - Applications** tab to assign applications to contact groups. The content of this page depends on the selected CCAAdv/WA **configuration mode**.

Tip

In either configuration mode, if there are no applications mapped to a configured contact group, the contact group displays on the dashboard showing only forecast metrics from the WFM systems.

Integrated Configuration Mode

If integrated configuration mode is enabled, the list of available applications presents applications that meet *all* of the following criteria:

- Configured applications
- Applications mapped to the same business objects to which the selected contact group is mapped
- Applications not mapped to this, or any other, contact group

If such an application is mapped to the contact group, and then later removed from CCAAdv configuration, this application disappears from the applications assigned to the contact group and the list of available applications. It no longer contributes metric values to the WA dashboard.

The same thing happens if the configuration of the application or the contact group is modified in a such way that their business objects no longer match.

In integrated configuration mode, you must assign one or more applications to the contact group.

In integrated configuration mode, agent groups assigned to the applications are automatically assigned to the contact group

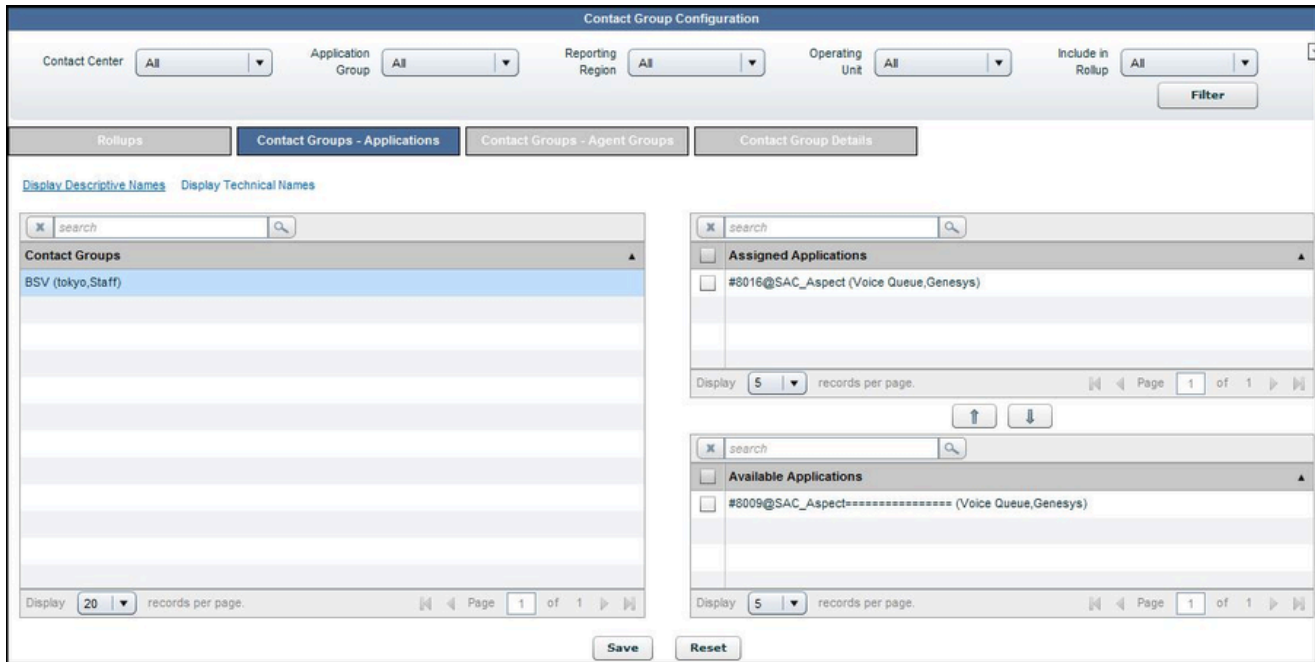
Independent Configuration Mode

If independent configuration mode is enabled, the list of available applications represents a set of all applications that are not mapped to this, or any other, contact group. Contact group-to-application mappings are independent of the CCAAdv configurations. You can assign any application to a contact group that is not associated with an agent group contact center.

In independent configuration mode, agent groups assigned to the applications are not automatically assigned to the contact group

Contact Group - Applications

The following screenshot shows the **Contact Groups - Applications** tab.



You can opt to display either descriptive or technical names of objects by clicking the **Display Descriptive Names** or **Display Technical Names** link.

Procedure: Maintain Contact Groups-to-Applications Assignments

Steps

1. Select the **Contact Groups - Applications** tab.
2. Use the filters in the uppermost panel to filter the display of contact groups in the **Contact Groups** panel.
The display shows contact groups, assigned applications, and available applications.
3. Select a contact group in the left panel.
This displays the already assigned applications, if any, in the **Assigned** panel on the right. Applications that are available for assignment appear in the **Available** panel. Chat, e-mail, and outbound metrics are not available in WA. Consequently, applications that are interaction queues or calling lists are never available here.
4. To move an application between the **Available** and **Assigned** panels, select its check box and click on either the up or down arrow between the two panels.
5. Click **Save**.

Contact Groups - Agent Groups

All types of contact centers are available for selection in the **Contact Center** drop-down menu. The menu contains both agent group contact centers, and other types of contact center. The names of AGCCs display with the names of the related network contact center (NCC), formatted as NCC Name: AGCC Name.

The contact groups mapped to any type of contact center display in the **Contact Groups** pane. The content of other panes on this page depends on the selected **CCAAdv/WA configuration mode**.

There is no restriction on the number of contact groups to which an agent group can be mapped.

Available Agent Groups in Integrated Configuration Mode

In integrated configuration mode:

- If the selected contact group is mapped to an AGCC, then use the following steps to make an agent group appear in the **Available Agent Groups** list for assignment to a contact group:
 - In **Application Configuration**:
 - Configure an application, assigning it to a network contact center.
 - Assign the agent group to the application.
 - In **Agent Group Configuration**:
 - Assign the agent group to the agent group contact center.
 - In **Contact Group Configuration**:
 - Configure *contact group 1*, assigning it to the same business objects as the application.
 - The agent group now displays in the **Available Agent Groups** list in the **Contact Group - Agent Groups** tab. You can assign the agent group to *contact group 2*.
- If the selected contact group is mapped to any other type of contact center, no available agent groups display in integrated configuration mode. The list of assigned agent groups displays, but you cannot edit it. The agent groups are those mapped to the applications that are mapped to the contact group and also to the same business objects to which the contact group is mapped. The page, in this case, can be used only for viewing the lists of agent groups expected on the dashboard view.

Available Agent Groups in Independent Configuration Mode

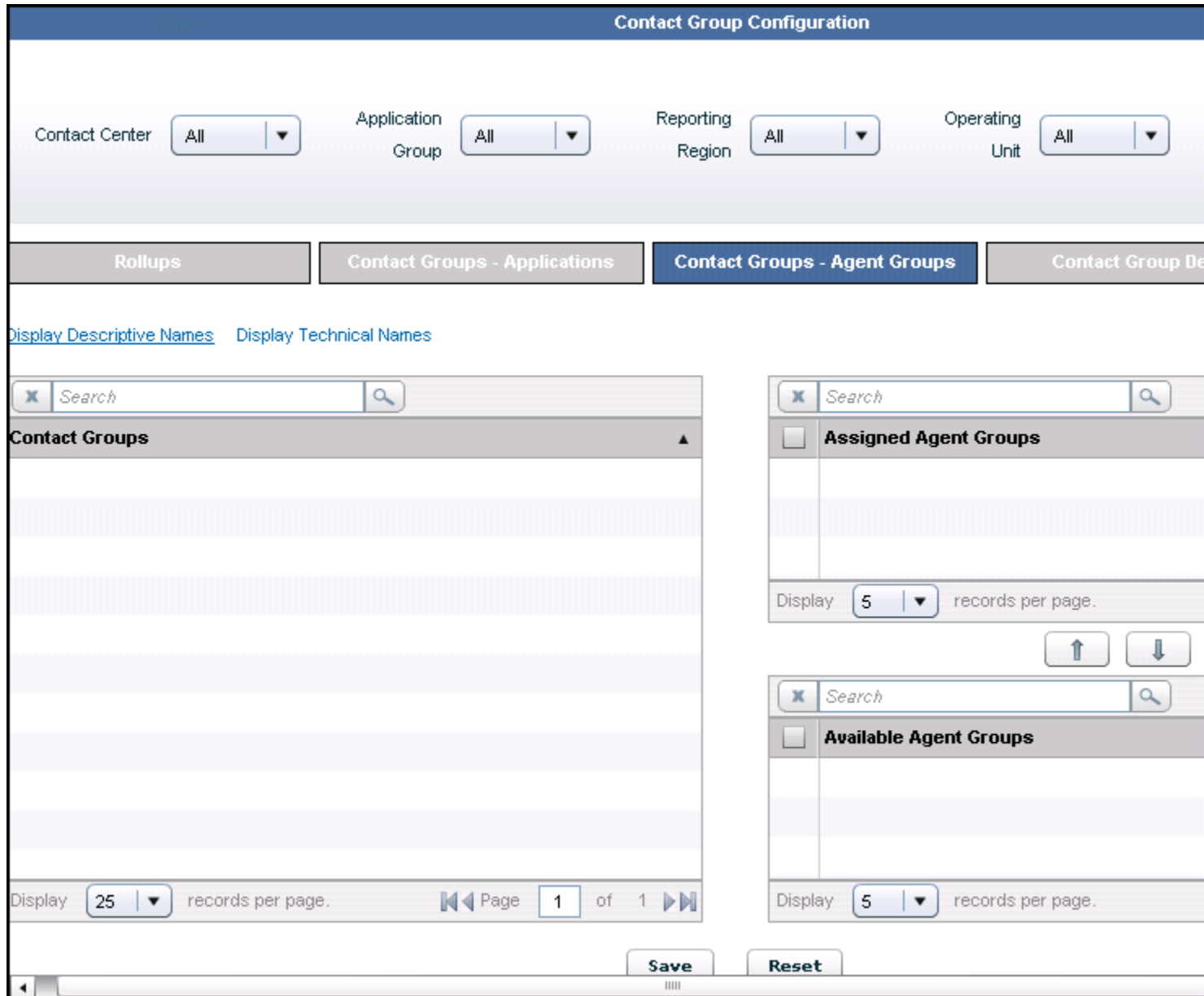
In independent configuration mode:

- If the selected contact group is mapped to an AGCC, the list of available agent groups includes all agent groups that have the following characteristics:
 - assigned to the same AGCC to which the selected contact group is mapped
 - **Include in WA** property set to Yes
 - not already mapped to the selected contact group
 - If the selected contact group is mapped to any other type of contact center, the list of available agent
-

groups includes all agent groups that are not mapped to the selected contact group. Any such contact group can be mapped directly to any agent group present in the **Available Agent Group** list.

Contact Groups - Agent Groups

The following screenshot shows the **Contact Groups - Agent Groups** page.



Agent Groups Assignments tab

The **Contact Groups - Agent Groups** tab allows selection of contact centers of any type. Each AGCC name is shown together with its parent NCC name. The names display in the following format:
NCC Name: AGCC Name

You can opt to display the descriptive or technical of contact groups and agent groups, by clicking on the **Display Descriptive Names** or **Display Technical Names** link.

Procedure: Maintain Agent Groups-to-Contact Groups Assignments

Steps

1. Select the **Contact Groups - Agent Groups** tab.
2. Use the filters in the uppermost panel to filter the display of contact groups in the **Contact Groups** panel. The display shows configured contact groups, the agent groups assigned to them, and the available agent groups.
3. Select a contact group from the left panel. This displays the already-assigned agent groups, if any, in the **Assigned** panel on the right. Agent groups that are available for assignment appear in the **Available** panel. Although agent groups associated only with interaction queues or calling lists display here, you should not assign these agent groups to a contact group because you cannot assign the interaction queue or calling list to a contact group. These agent groups will never appear in the WA dashboard.
4. To move an object between the **Available** and **Assigned** panels, select its check box and click on either the up or down arrow between the two panels.
5. Click **Save**.

Contact Group Details

The **Contact Group Details** table displays the details of each contact group, including:

- **Name:** The name of the contact group provided by the workforce management system.
- **Source:** The workforce management system that provided the contact groups (for example, Genesys Workforce Management, Aspect eWFM, IEX TotalView) or the Site ID (or the contact center ID) of the contact group from Genesys Workforce Management. For more information, see the [section on importing contact groups](#) in the *Performance Management Advisors Deployment Guide*.
- **Group:** The type of contact group (for example, forecast or staff).
- **Active:** Indicates whether the contact group is active or not.
The status will be Yes if the last time WA imported that system's data, the contact group was present in the imported data.
The status will be No if the last time WA imported that system's data, the contact group was not present in the imported data.
- **Include in Rollup:** Indicates whether or not WA should use this contact group when calculating metrics of related business objects, and display this contact group on the dashboard.

Procedure: Update a Contact Group

Steps

1. To display the details of a contact group either select from the list or search and select.
2. Type a meaningful name in the **Descriptive Name** field.
3. **Include in Rollup**: Check the box to include the contact group in rollups.
In addition to this setting, the contact group must be *configured*; that is, it must be related to a contact center, application group, reporting region, and/or operating unit.
4. Click **Save**.
A confirmation message displays and the details display in the table.

Removing Contact Groups from WA Configuration

Removing contact groups from your Workforce Advisor (WA) configuration does not impact any other object configuration. After you remove a contact group, all of its associations with applications and agent groups are removed automatically and permanently.

Related Information

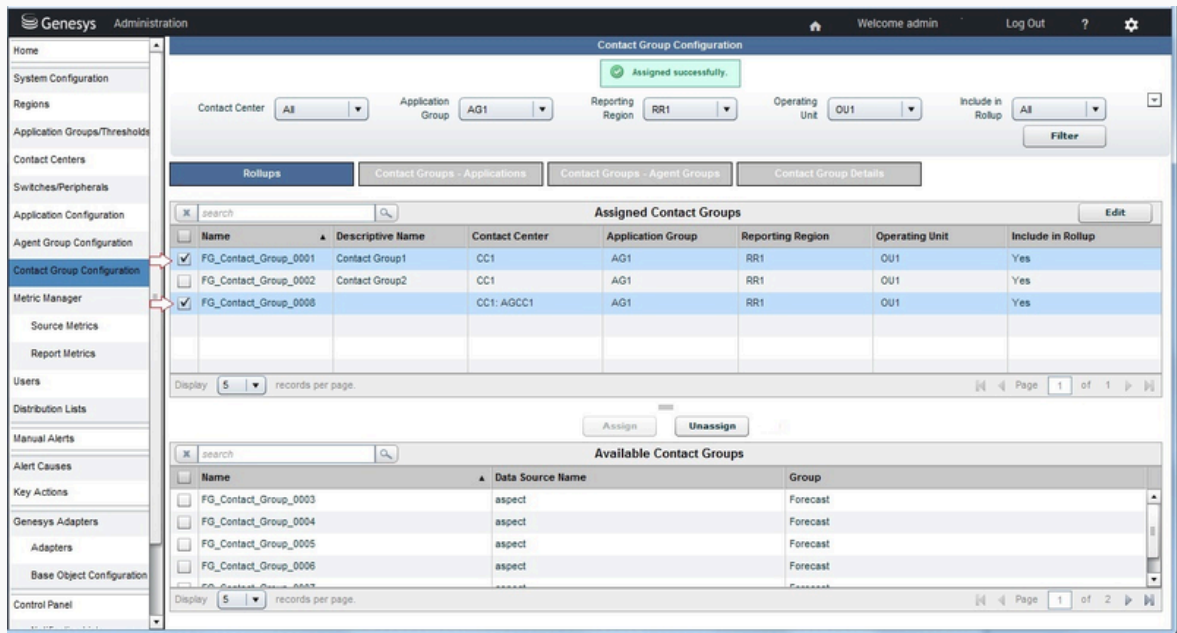
[Removing Agent Groups from CCAdv/WA Configuration](#)

[Removing Applications from CCAdv/WA Configuration](#)

Procedure: Removing Contact Groups from your Workforce Advisor Configuration

Steps

1. Navigate to the **Contact Group Configuration** page, **Rollups** tab.
2. Locate the contact group(s) that you want to remove.
3. Using the check boxes, select the contact group(s) that you plan to remove. The following figure shows the selection of two contact groups that will be removed.



4. Click the **Unassign** button.

Metric Manager

Starting in release 8.5.0, the Metric Manager label in the Administration Module is a section heading, and is not a link to a page. The **Report Metrics** page replaces the Metric Manager of earlier releases.

The Metric Manager section of the Advisors Administration module contains two pages:

- Source Metrics
- Report Metrics

What are Source Metrics and Report Metrics?

A report metric is a metric used in the dashboard of one of the reporting applications. In Advisor release 8.5.0, this refers to a metric used in the dashboard of either Contact Center Advisor/ Workforce Advisor or Frontline Advisor.

A source metric is the definition of the metric in the source system, such as Genesys Stat Server.

See *Terminology* below for detailed definitions.

Custom Metrics Support

Starting in release 8.5.0, you can create and update custom metrics for application, agent group, and agent objects for the Contact Center Advisor and Frontline Advisor.

Restrictions

Genesys does not support the creation of new custom metrics for the WA application.

Access to metrics must be configured by an administrator in Genesys Configuration Server. Data relating to or dependent on metrics to which a user does not have access permissions does not display for that user. For information about role-based access control (RBAC) privileges related to metric management actions, see [CCAdv/WA Access Privileges](#) and [FA Access Privileges](#).

Terminology

The following terminology is used in the descriptions of the **Source Metrics** and **Report Metrics** pages of the Administration module.

- The *Application* object type means the base object types of queue, interaction queue, calling list, call type, or service, for CCAAdv.
- A *Raw Report Metric* is a report metric that is created from a source metric. When creating a raw report metric, you must select a source metric. The source metrics available for selection are the Genesys source metrics that are created and maintained using the Source Metric Manager. Only the source metrics that correspond to the object type you selected are available when creating a raw report metric.
- A *Calculated Report Metric* is a report metric expressed as a formula involving one or more raw report metrics as operands. The format options specified for the calculated report metric override any format options specified for the individual raw report metric used to build the calculated report metric. A source metric cannot be directly associated with a calculated report metric.

Source Metrics

In the Source Metric Manager, you manage source metric definitions that come from the Genesys Stat Server data source, also called Statistic definitions.

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

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


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

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

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

Supported Media Types

The Source Metric manager supports the following media types for custom source metrics:

- Voice
- E-mail
- Chat
- Workitem
-  SMS (starting with release 8.5.2)

Stat Server Current State Source Metrics

New custom source metrics cannot be created for the Stat Server categories of Current State and Current State Reasons. There are source metrics that ship with Advisors for these categories, and the customization available on these metrics is limited. For example, the Reason Code Key is configurable, but it is not possible to extract agent readiness based on capacity rules for a non-voice channel. See also [Customizing the Stat Server Current Target State Source Metrics](#).

The AgentState source metric – derived from the Stat Server Current State category – includes a

filtered source metric definition called AgentDN. Frontline Advisor uses the related AgentDN report metric to provide information about the DN extension, ACD position, or multimedia channel into which each agent is logged.

Related Information

- See [Team View](#) for more information about the display of DN information on the Frontline Advisor supervisor dashboard.
- See [Source Metrics Retrieved for Each Agent](#) and [State Metrics Displayed for Agents](#) for information about the metrics associated with the display of agent DN information on the FA supervisor dashboard.
- See [Filtered Source Metrics](#) for more general information about filtered source metrics.

Relationships between Source and Report Metrics

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

If you select this object type in the Source Metric Objects field	Then the Source Metric will be available for this Report Metric object type
Agent	Agent
GroupAgents	Agent Group
Queue*	Application (queue-based)
NEW GroupQueues*	Application (DN Group-based)
StagingArea	Application
CallingList	Application
<p>* When you create a new custom source metric using the Mediation DN object group, you can select either the Queue or GroupQueues object, or you can select both. Selecting the Queue object means the source metric will be applicable only to queues. Selecting the GroupQueues object means the source metric will be applicable only to DN groups. If your custom source metric should be applicable to both DN groups and queues, then select both Queues and GroupQueues in the Objects field for the Mediation DN object group.</p>	

Source Metrics and RBAC

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

RBAC privileges also manage the following:

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

See [CCAdv/WA Access Privileges](#) and [FA Access Privileges](#) for the list of privileges associated with the Source Metric Manager.

Working with Source Metrics

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

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

- Reason code Key
- Reason Start Overrides Status Start

For users with Edit privileges:

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

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

For users with Delete privileges:

- The Delete button is present and enabled if the selected metric is a custom metric (not a default source metric).
- When attempting to delete a custom source metric that has dependent report metrics, an error message indicates that you cannot delete the metric because of the dependent report metric(s).

Category Options

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

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

Main Mask/Relative Mask Wild Cards

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

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

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

Filtered Source Metrics

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

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

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

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

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

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

Finding Filtered Source Metrics in the Source Metrics Manager

Filtered source metrics are variations of other parent source metrics; you can find the filtered source metrics only under the respective parent source metric. For example, to find the filtered variations of a source metric called Retrieved Calls, navigate to the Retrieved Calls source metric and select

it. The filtered variations are displayed in the details in the lower half of the page.

Configuring the Media_Workitem Filter as the Business Attribute Value for the Default iWD Source Metrics

Starting in release 8.5.1, Advisors include some intelligent Workload Distribution (iWD) source metrics (not including iWD Datamart metrics). These iWD source metrics include a Media_Workitem filter. Before you enable the iWD metrics, you must configure an attribute value in the **Advisors Filters** business attribute to correspond to the Media_Workitem filter. Genesys recommends that you configure the **Advisors Filters** business attribute on a tenant that is the default tenant for the Advisors suite installation (on which you configure all Advisors metadata).

Use the following properties when you configure the Media_Workitem filter attribute value in Configuration Server:

- name = Media_Workitem
- description = PairExists("MediaType", "workitem")

The name of the filter (Media_Workitem) is case-sensitive; ensure you enter it correctly.

Customizing the Stat Server Current Target State Source Metrics

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

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

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

Creating a Custom Source Metric for the CurrentTargetState Category

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

You use the default Current Target State source metric that is supplied with Advisors and the **Filtered Current Target State Source Metrics** section of the Source Metrics Manager to configure your specific Current Target State attributes. The default Current Target State source metric supports both

agent and agent group object types.

Click the **Edit** button in the **Filtered Current Target State Source Metrics** section of the Source Metrics Manager for the Current Target State source metric. The following figure shows the **Edit** button at the bottom of the **Source Metrics** window.

The screenshot shows the Source Metrics Manager interface. On the left is a navigation pane with options like Home, System Configuration, Regions, Application Groups/Thresholds, Contact Centers, Application Configuration, Agent Group Configuration, Metric Manager, Source Metrics (selected), Report Metrics, Users, Genesys Adapters, Adapters, Base Object Configuration, and Frontline Advisor. The main area displays a table of source metrics:

Name	Category	Subject	Media Type (Channel)
ACWStatus	TotalNumber	DNAction	Voice
ACWTime	TotalTime	DNAction	Voice
AgentCurrentTargetState	CurrentTargetState	AgentStatus	None
AgentState	CurrentState	AgentStatus	None
AllACWVoiceTime	TotalAdjustedTime	DNStatus	Voice
AnswerWaitTime	TotalTime	DNAction	Voice
AnswerWaitTimeQueue	TotalTime	DNAction	Voice
Avail	CurrentNumber	AgentStatus	None

Below the table is a 'Display' dropdown set to '30' records per page. Below that is a 'Details' pane for the selected 'AgentCurrentTargetState' metric:

Name	AgentCurrentTargetState	Media Type (Channel)	None	Custom Business Name Value
Category	CurrentTargetState	Object	GroupAgents, Agent	
Main Mask	*	Use Source Timestamp		Java Sub Category
Relative Mask		Reason Start Overrides Status Start		Description Agent Current Target
Formula		Aggregation		

At the bottom of the details pane, there is a red-bordered section labeled 'Filtered Current Target State Source Metrics'.

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

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

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

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

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

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

Current Target State Metrics and Agent Groups

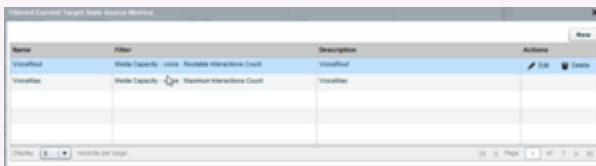
When the Current Target State metric is reported, AGA extracts the configured media capacity attributes for each agent in an agent group. The corresponding metric at the agent group level is evaluated based on the media capacity attribute at the agent level. Therefore, for all the media capacity attributes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

Current Target State Metrics and Metric Applicability

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

Example: Using Metrics Based on Current Target State

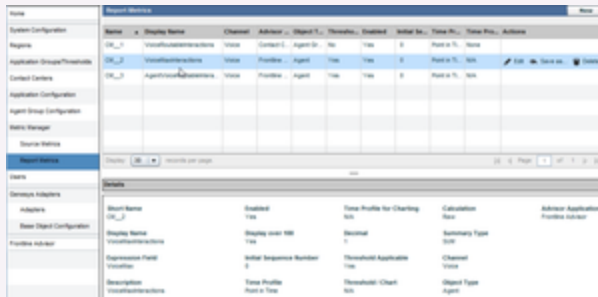
While an agent might manage many chat or email interactions simultaneously, that same agent can typically manage only one voice interaction at a time. To track an agent's availability for routable voice interactions using metrics on the dashboard, you could create report metrics based on the Current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



Name	Filter	Description	Actions
VoiceRout	Media Capacity - voice	Available Interactions Count	VoiceRout
VoiceMax	Media Capacity - voice	Maximum Interactions Count	VoiceMax

Custom source metrics based on the default Current Target State source metric

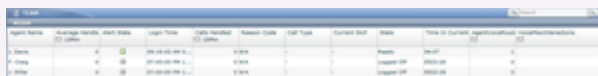
You would then create custom raw report metrics that use those custom source metrics as the foundation. The following screenshot shows an example of custom report metrics.



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

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

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

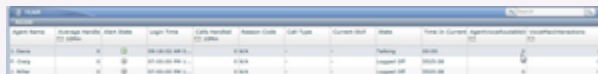


An agent in the Ready state is available to take a call. The AgentVoiceRoutableInteractions metric has a value of 1 for the agent who is ready. The VoiceMaxInteractions metric indicates that the agent can handle a maximum of 1 call at any time.

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



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



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

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 Performance Management 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 of 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. The **Report Metrics** page is based on the Metric Manager of earlier releases, but, starting in release 8.5.0, includes additional functionality.

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	Arithmetic operators: <ul style="list-style-type: none"> • + (addition) • - (subtraction) • * (multiplication) • / (division) Brackets (to ensure the required operation sequence) You can also include the >, <, and = operators in expressions.

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+RouterCallsAbandQto5).
- 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

<tabber>

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, CCAAdv, WA	FA: Agent CCAAdv: Agent Group or Application WA: Contact Group	All	<p>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.</p>

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
				indicates that values over 100 display actual values. If the checkbox is cleared, values over 100 display as 100+.
Format Pattern	FA	Agent	All	A drop-down list containing options to specify the general structure of the metric. The default selection is Number.
Time Profile	FA, CCAAdv, WA	FA: Agent CCAAdv: Agent Group or Application WA: Contact Group	All, but with qualifications: <ul style="list-style-type: none"> CCAAdv/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>Starting in release 8.5.001, 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"> CCAAdv: <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</p>

Property	Advisors Application	Object Types	Editable For	Description
				<p>to enable and 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="1258 982 1507 1493" 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>Starting in Advisors 8.5.001, 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</p>

Property	Advisors Application	Object Types	Editable For	Description
				<p> durations displayed in the 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

Property	Advisors Application	Object Types	Editable For	Description
				<p>aggregation engine calculates the metric for the enabled time profiles.</p> <div data-bbox="1304 516 1511 1155" style="border-left: 2px solid orange; padding-left: 10px; margin: 10px 0;"> <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

Property	Advisors Application	Object Types	Editable For	Description
				<p>first time 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.

Property	Description
Expression Field	<p>You build the expression, or formula, for your custom metric 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</p>

Property	Description
	<p>are configured to include this object configuration filter.</p> <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 CCAdv 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 CCAdv 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 CCAdv 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

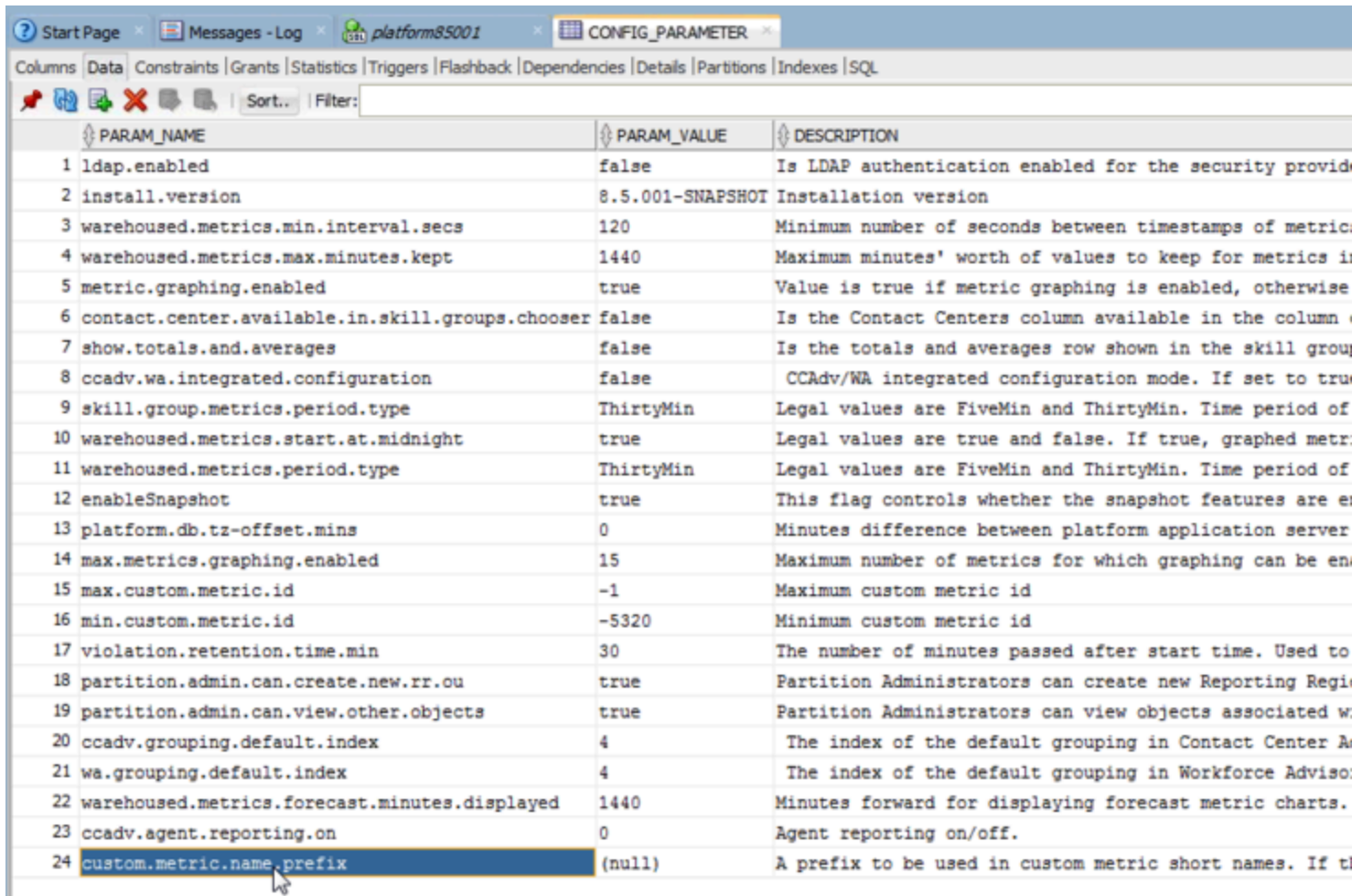
1. Save or apply the change on the **Report Metrics** page.
2. In the FA Administration page, **Settings** tab, click the **Hierarchy Reload** button. Alternatively, wait until the nightly reset procedure has executed.

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.



The screenshot shows a database window with a table named 'CONFIG_PARAMETER'. The table has three columns: 'PARAM_NAME', 'PARAM_VALUE', and 'DESCRIPTION'. The 'custom.metric.name.prefix' parameter is highlighted in blue, with a mouse cursor pointing to it. The value for this parameter is '(null)'. Other parameters include 'ldap.enabled' (false), 'install.version' (8.5.001-SNAPSHOT), and 'warehouse.metrics.min.interval.secs' (120).

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 warehouse.metrics.min.interval.secs	120	Minimum number of seconds between timestamps of metrics
4 warehouse.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 warehouse.metrics.start.at.midnight	true	Legal values are true and false. If true, graphed metr
11 warehouse.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 warehouse.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 Manager 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.

Working with Metric Groups

Starting in release 8.5.0, you can collect raw reporting metrics into groups under each supported reporting application on the **Report Metrics** page in the administration module. Reporting applications supported by the **Report Metrics** page are Contact Center Advisor and Frontline Advisor. A metric can participate in only one metric group. You can decide how you want to group the reporting metrics used in your enterprise based on your business needs.

One consideration when grouping report metrics is the relationship between a metric and the source objects. Previously, by default, all enabled metrics were applied on all configured base objects for a given object type. For example, all the enabled queue metrics were applicable to all the CCAdv queues published in a deployment.

Previously, you could distinguish between voice and non-voice virtual queues based on the Advisors queue type configuration. Voice and non-voice metrics could be based on the queue. However, this did not allow further sub-classification within the queue type, or allow classification of other object-type metrics.

Using the metric grouping functionality, you can specify exactly which metrics are applicable to each source object. On the **Report Metrics** page, group raw report metrics, and then map the metric groups to configured source objects using Genesys Administrator. This mapping of metric groups to configured source objects specifies the applicability of a metric to configured source objects. The configured metric applicability works on all of the enabled time profiles of a given metric.

Metric applicability configured on a given object is applied to all of the CCAdv object-filter segments. You cannot specify the metric applicability on individual CCAdv base object-filter combinations because each filter combination is not a separate object in Genesys Configuration Server.

You can configure metric applicability for the following CCAdv and FA source objects:

- CCAdv:
 - Agent Groups
 - Applications (Genesys source objects: queues, calling lists, and interaction queues)
- FA:
 - Agents

Metric Grouping

The **Report Metrics** page allows grouping of metrics at the level of the raw report metric. Each raw report metric configured for a reporting application can be classified under one of the metric groups.

You can group related raw report metrics that are involved in evaluations of calculated report metrics for a source object in the same group, but it is not strictly necessary. If the various raw metrics involved in the calculation of a metric for a specific base object are in different metric groups, you must ensure that all metric groups that contain the contributing raw metrics for the calculation are

mapped to the source object. If a group containing a raw metric required to successfully evaluate a calculated metric is not mapped to the corresponding source object, that raw metric cannot contribute to the metric's calculated value. See an example below on this page.

Metric groups created using the **Report Metrics** page are not saved in the Configuration Server, but only in the Advisors Platform database. See additional information on the *Report Metrics* page in this document.

Restrictions

A metric can participate in only one metric group.

Metric grouping is allowed only on raw report metrics. You cannot group calculated report metrics.

Example

You have a calculated report metric - Total Handle time - that is evaluated as the sum of two raw report metrics. The formula is $\text{Total HandleTime} = \text{Total Talk time} + \text{Total AfterCallWork Time}$.

Scenario 1:

- You place Total Talk Time in metric group 1.
- You place Total AfterCallWork Time also in metric group 1.

Assumption: On a given source object, the Total Handle Time metric must be evaluated.

Configuration: Configure the metric applicability such that metric group 1 is applicable on the given source object.

Scenario 2:

- You place Total Talk Time in metric group 1.
- You place Total AfterCallWork Time in metric group 2.

Assumption: On a given base object, the Total Handle Time metric must be evaluated.

Configuration: You must configure the metric applicability such that metric group 1 and metric group 2 are applicable on the given source object.

Scenario 3:

- You place Total Talk Time in metric group 1.
- You place Total AfterCallWork Time in metric group 2.

Assumptions:

- On a given base object, the Total Handle Time metric must be evaluated.
- You configured metric group 1 to be applicable on the given source object.
- You configured metric group 2 to be applicable on a source object that is not the given source object.

In this scenario, only Total Talk Time is available for evaluation of the calculated metric; Total AfterCallWork time is not considered in that evaluation. Depending on the evaluation of the formula,

this can result in Total Talk time = Total Handle Time in the case of CCAAdv, but in FA, the result of the evaluation might be N/A.

Configuring Metrics Applicability in Configuration Server

To configure metric applicability using Genesys Administrator, specify the metric groups as **Annex** options on the source objects.

You can configure metric applicability to individual source objects, or you can select more than one source object and configure identical metric applicability on all that you have selected.

For CCAAdv, you can select agent groups, queues, interaction queues, and calling lists to configure metric applicability.

For FA, you can select agents to configure metric applicability.

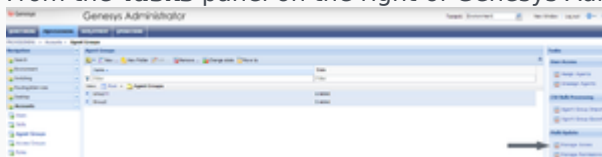
The following procedures show you how to use Genesys Administrator to configure metric applicability for agent groups. The same procedure can be used for configuring all other source objects.

Procedure: Configure metric applicability for selected objects

Purpose: Use this procedure to add new metric groups as options to selected objects in Genesys Administrator.

Steps

1. Select the objects for which you want to configure identical metric applicability. For example, if the same metric applicability should be configured for a given set of agent groups, identify those agent groups and multi-select them.
2. From the **Tasks** panel on the right of Genesys Administrator, select **Manage Annex**.



Select Manage Annex

3. On the **Add** section, click the **Add** button and add a new annex section called Advisors Metric Groups, as well as an option called the name of the metric group. The name of the metric group entered here must match the name of the metric group created and selected for the raw report metric on the Advisors **Report Metrics** page. The metric group name must also match in case; that is, it is case-sensitive.

Add the Advisors Metric Groups Section

Genesys Administrator requires that you specify a value for each option. Anything can be entered, such as true or yes. The value for the option is not used.

If you have more than one metric group to add as an applicable metric group for the selected objects, click the **Add** button and repeat the process.

For example, the figure, "Advisors Metric Groups options" shows three metric groups added: Voice, Outbound, and eServices. Those three metric groups contain metrics that must be associated with the selected agent groups.

Section	Option	Value
Advisors Metric Groups	Voice	true
Advisors Metric Groups	Outbound	yes
Advisors Metric Groups	eServices	yes

Advisors Metric Groups options

4. Click **Execute** and **Finish** to save your changes.

Procedure: Remove a metric group from selected objects

Purpose: Use this procedure to remove a configured metric group from selected objects.

Steps

1. Select the objects for which identical metric applicability must be configured. For example, if you must configure identical metric applicability for a given set of agent groups, identify those agent groups and multi-select them.
2. From the **Tasks** panel on the right of Genesys Administrator, select **Manage Annex**.
3. On the **Remove** section, click the **Add** button to add the metric group option that must be removed.
4. Click **Execute** and **Finish** to save your changes.

Default Metric Group

The Advisors default raw report metrics are all grouped under the Default metric group. Adding report metrics to this default metric group means that these metric groups are implicitly applicable to all source objects.

There is no need to explicitly configure a default metric group in the Configuration Server. See also *When the statistic template metric group is the Default metric group* below.

What Happens if I do not Assign Metric Groups to a Source Object?

If, for a given source object, you do not add any metric groups as Options, then none of the metrics from metric groups are applicable for that source object. However, if there are any other metrics of that object type that are still grouped under the Default metric group, they are still considered to be applicable. Therefore, there is no need to configure metric applicability on metrics that must be applied to all the source objects; it needs to be configured when some metrics must be excluded from some objects.

When are Configuration Server Changes Applied for CCAdv?

On startup, the configured source objects are fetched from the Configuration Server and stored in memory; this includes the metric groups configured on the CCAdv source objects. CCAdv subscribes to changes to the source objects in the Configuration Server, and this includes updates to the metric group configuration.

For both new and already-published objects, changes in the metric applicability are applied during the overnight refresh.

When are Configuration Server Changes Applied for FA?

On startup, when the FA hierarchy is loaded from the Configuration Server, the metric groups configured on the FA agent source objects are also loaded. On overnight refresh, or on the forced reload of the hierarchy from the Configuration Server, any changes to the metric group configuration on the FA agent objects are also reloaded.

How Metric Applicability works with Include/Exclude in Statistic Requests

CCAdv and FA use the metrics applicability configuration to decide which statistics to request on a

specific object.

CCAdv and the FA application send the configured statistics to the data manager, which then routes those statistics to one or more adapter instances. When statistic requests are sent to the data manager, the applications (FA and CCAdv) also look up the metrics applicability configuration. Based on the results, the application (CCAdv or FA) determines which statistics to include in the statistics request.

When the statistic template metric group is the Default metric group

There is no default metric group in the Configuration Server to correspond to the Default metric group (the default metric group) in Advisors. It is unnecessary to fetch the objects applicable to this default metric group; any statistic that belongs to the Default metric group is automatically included for any object of that object type. For example, if there is an agent group metric that is included in the Default metric group, then it is applicable to all the published agent groups. In this example, "agent group" is the object type that links the agent group metric with the agent group source object.

When the statistic template metric group is a custom metric group

For a metric group that you create, CCAdv and FA look up the applicable objects. For a specific statistic request, if the corresponding metric group is applicable for the object (identified by the object ID and the object type), then that specific statistic is included in the statistic requests to Stat Server. If the metric group is not applicable for the object that corresponds to the statistic, then the statistic is excluded from the statistic requests to the Stat Server.

How Metric Applicability works with Voice and Non-Voice Stats Requests on Queues

In release 8.1.5, you used queue-type configuration of the virtual queues to specify if non-voice statistics should be requested on the virtual queues. If the option of "queueType = NonvoiceOnly" was set on a virtual queue in Configuration Server, then only non-voice statistics were requested.

Starting in release 8.5.0, metric grouping and the mapping of metric groups to configured source objects replaces the usage of queue-type configuration. You can no longer use queue-type configuration in Configuration Server to indicate if non-voice statistics are requested on specific virtual queues. Instead, using metric applicability, the system determines if non-voice statistics can be requested on a virtual queue.

On every voice-only queue, the metric applicability must be configured to point to voice metric groups. On non-voice queues, the metric applicability must be configured to point to non-voice metric groups.

If there are queue metrics assigned to the Default metric group, those metrics are requested on both voice and non-voice queues.

If you currently use queue-type configuration, there is no migration path to convert to the metric applicability configuration. You must reconfigure based on metric applicability.

Metric Applicability in FA

FA gets its metric applicability mapping from Configuration Server. The FA tasks that issue statistics for state and performance metrics and rules do the following:

1. Resolve IDs of the agents to whom metric applicability applies
2. Resolve IDs of the metrics that apply to the above agents, and
3. Before issuing statistics, filter out metrics that do not apply to certain agents.

The result of the preceding actions is the following:

1. The connector returns statistics for certain metrics for certain agents.
2. When a metric does not apply to an agent:
 - a. users see N/A on the dashboard, and
 - b. a metric that does not apply to an agent is excluded from rollups that include this agent. That is, metrics contribute to rollups based on applicability.
3. Assigned and unassigned metrics are mutually exclusive:
 - a. If no metric groups are assigned, all metrics apply to all agents.
 - b. If metric group MG1 is associated with agent A1, then only metrics in MG1 apply to A1.
 - c. If agent A2 has no metric groups applied, then all metrics apply to A2 except the metrics from MG1, which was assigned to agent A1.

If there are a number of metric groups configured in Metric Manager, but those metric groups are not configured on any of the agents in the FA hierarchy, then this is considered an incomplete configuration for FA metric applicability; the metrics on such metric groups are considered as applicable for all agents. Therefore, whenever metrics are in specific metric groups, make sure those metric groups are also configured on agents, as needed.

If a configured metric group is removed from all agents in the hierarchy, make sure to either unassign such metrics from that metric group by placing the metric back in the Default metric group, or disable those metrics if the intention is to not make those metrics applicable to any of the agents. Genesys recommends that you avoid disabling metrics by placing them in an unused metric group.

Tracing the Metric Applicability in CCAdv

To trace how metrics have been applied to source objects for CCAdv, in the XML Generator `log4j.xml` file, change the priority value for the `com.genesyslab.advisors.eacore.adapterclient` category to `DEBUG`:

```
log4j.category.com.genesyslab.advisors.eacore.adapterclient=DEBUG
```

Whenever an object is published, the log indicates the number of statistics that are applicable on an object. For example:

```
2014-02-22 13:31:17,775 DefaultThreadPool 6 DEBUG [IssueStatistics] Found 28 applicable metrics for object: ObjectIdentifier [id=8354, name=7007@LucentG3,
```



```
tenantName=defaultTenant, filterName=null, objectSubType=ACD]
```

Users

User profiles are maintained in the Configuration Server. To access these profiles, use Genesys Administrator.

Users Page

In Genesys Administrator, users correspond to the Person object. Users (persons) and roles must be assigned access to modules, as well as to contact centers, application groups, regions, and metrics.

Important

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

See also:

- [Advisors Business Objects](#)
- [CCAdv/WA Access Privileges](#)

Tip

The **Effective Date** and **Expiration Date** fields were removed from the user profiles in Configuration Manager because they are not supported by the Configuration Manager for Person accounts. For more information about creating and maintaining Persons in the Genesys configuration environment, see:

- [Genesys Administrator Extension Deployment Guide](#)
- [Framework Configuration Manager Help](#)
- [Genesys Administrator Extension Help](#)

Distribution Lists

CCAdv and WA can send e-mail notifications to specified distribution lists. The notifications are about:

- Alerts caused by metrics' violations of thresholds. See [Application Groups and Thresholds](#) for detailed information about how CCAdv and WA use these lists to notify users about alerts.
- Alerts about offline peripherals.
- An external source system has not provided updated real-time data within a configurable interval. See [System Configuration](#).

The following screenshot shows the **Distribution Lists** page.

Distribution Lists

<input type="checkbox"/>	Name ▲	Effective Date	Active

Display 5 records per page.

Create / Edit

*** Name**

*** Distribution Alert**

- Technical - 1
- Technical - 2
- Business - 1
- Business - 2

Members

*** Effective Date**

*** Contact Centers**

Distribution Lists Page

Threshold Violations Alerts and Offline Peripheral Alerts

Assign contact centers and application groups to distribution lists in order for users to receive email notifications about threshold violation alerts or peripheral offline alerts. The users will receive email about alerts that are created for applications or contact groups related to the application groups or contact centers.

A distribution list must always have at least one contact center and one application group associated with it. When assigning a network contact center, you can also add its related agent group contact

centers.

In the **Distribution Lists** page, you will not see contact centers and application groups to which you have no permissions assigned in the Genesys Configuration Layer.

Distribution lists are associated with a specific type of alert. The types are:

- B1 and B2 for business alerts. (1 means critical severity, and 2 means warning severity)
- T1 and T2 for technical alerts

The distribution list sends email only about alerts whose type and severity match the types and severities for which the list is configured.

Email and Permissions in Configuration Layer

Email regarding alerts about threshold violations or offline peripherals is sent only to users who have permissions configured in the Genesys Configuration Layer to the contact center, application group, and geographic region related to the alert. Access to these objects must be configured by an administrator in Genesys Configuration Manager. See [CCAdv/WA Access Privileges](#).

Advisors modules receive information about a user's permissions to the contact center, application group, and geographic region objects at different times, depending on the module. WA gets information about a user's permissions when the user logs in to Advisors. CCAdv gets information about users' permissions when XML Generator starts; XML Generator checks for updates to permissions settings in the Configuration Layer every 24 hours after that. The 24-hour refresh cycle means that changes to users' permissions do not take effect immediately with regard to email about alerts, with the following results:

- CCAdv can continue to send email about an alert to a user for up to 24 hours after you removed that user's access permission to the related object.
- CCAdv does not send email about an alert to a user to whom you have recently granted access permission to the related object, for up to 24 hours after you granted access.

Alert Email Notification about Source System Not Updating Data

Contact Center Advisor sends e-mail to a distribution list if an external source system has not provided updated real-time data within a configurable interval. See [System Configuration](#). When sending this e-mail, Contact Center Advisor ignores the **Distribution Alert** settings of the distribution list, even though at least one checkbox must be selected. Contact Center Advisor also ignores the application groups and contact centers assigned to such a list when sending e-mail about these failures.

Selecting Individual Distribution List Members

If you select individual distribution list members, you must assign manually any members added in the future.

Working with Distribution Lists

Procedure: Maintain Distribution Lists

Steps

1. On the navigation bar, select **Distribution Lists**.
2. To add a new distribution list, do one of the following:
 - Click **New** and begin adding details in the **Create/Edit** panel.
 - Click in the **Name** field and begin adding details in the **Create/Edit** panel.
3. To edit a distribution list, do one of the following:
 - Select its check box in the upper panel and edit the details in the **Create/Edit** panel.
 - Search for it using the **Search** feature above the upper panel, then select its check box and edit the details in the **Create/Edit** panel.
4. Click the **Save** button.
A confirmation message displays.

Procedure: Delete a Distribution List

Purpose: Delete a distribution list to stop subsequent alert notifications. Note that you can deactivate a distribution list instead of deleting it to avoid the need to re-enter it in the future.

Steps

1. On the navigation bar, select **Distribution Lists**.
2. To display the details of a user, either select the check box for a user from the list in the upper panel, or search for a specific user and then select the checkbox associated with that user.
3. Click the **Delete** button.
A confirmation window displays.
4. To confirm the deletion, click **OK**.
A message confirms the deletion.

Manual Alerts

Manual alerts allow for the distribution of information to Advisor users. These manual alerts are useful for quickly disseminating information to the field through the dashboard.

The **Alerts** page allows you to add an alert message manually. The alerts display, based on the users' viewing rights, in the **Alerts** map and the **Alerts** pane in CCAdv and WA. The following screenshot shows the **Alerts** page.

The screenshot displays the 'Manual Alerts' interface. At the top, there is a search bar with the text 'search' and a magnifying glass icon. Below this is a table with the following columns: 'Alert Time', 'Expiration Date', 'Alert Type', 'Alert Priority', and 'Alert Message'. The table is currently empty. Below the table, there is a 'Display' dropdown menu set to '5' records per page. Below the table is a 'Create / Edit' section with the following fields: '* Alert Message' (text input), '* Alert Type' (radio buttons for 'Business' and 'Technical'), 'Effective Date' (text input), '* Expiration Date' (text input with a calendar icon), '* Expiration Time' (text input), '* Alert Priority' (radio buttons for '1-Re'), and '* Contact Centers' (list box). At the bottom right of the form are 'Save' and 'Reset' buttons.

Alerts Page

There are two types of manual alerts:

- Business alerts (B)
- Technical alerts (T)

There are two alert severities:

- 1 (critical - red)
- 2 (warning - yellow)

If both an agent group contact center and a network contact center are selected for the manual alert, two alerts display on the map; that is, if the network contact center has latitude and longitude coordinates.

If both an agent group contact center and a network contact center are selected for the manual alert, the network contact center alert and the agent group contact center alert display in the **Alerts** panel.

If only an agent group contact center is selected, the agent group contact center alert displays in the **Alerts** panel.

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

Procedure: Add a Manual Alert

Steps

1. Click **New**.
2. Enter the text of the alert message. The text should be no longer than 24 characters. The text displays in the carousel and the **Alerts** panel on the dashboard.
3. Type the alert message.
4. Choose the alert type.
5. Choose the alert priority and severity.
6. To determine the duration of the displayed message, type the expiration date and the expiration time.
7. To choose the affected contact centers, select the associated check boxes.
8. To add the alert, click **Save**.
A confirmation message displays. The alert displays in the **Alerts** panel.

Procedure: Update a Manual Alert

Steps

1. Type the updated message.
You can only update the message.
2. Click the **Save** button when complete.
A message confirms the update.

Procedure: Delete a Manual Alert

Purpose: Deleting a manual alert removes it from the **Alerts** list and from the dashboard.

Steps

1. Click the **Delete** button beside the alert to be deleted.
A confirmation window displays.
2. To confirm the deletion, click **OK**.
A message confirms the deletion.

Alert Causes

Users record the alert cause when creating a key action report. They may select the cause from the **Alert Cause** drop-down list or enter a new cause. In addition, users can suggest that the entered cause be added to the drop-down list for future use. The alert causes are maintained on the **Alert Causes** page in the Administration module. The following screenshot shows the **Alert Causes** page.

The screenshot shows the 'Alert Causes' page. At the top, there is a search bar with a magnifying glass icon and a 'New' button. Below the search bar is a table with the following columns: Name, Author, Approved, and Display Order. The table is currently empty. At the bottom of the page, there is a 'Create / Edit' section with the following fields: 'Alert Cause' (text input), 'Display Order' (text input), and 'Approved' (checkbox, checked). There are 'Save' and 'Reset' buttons at the bottom right.

Alert Causes Page

The details of an alert cause include:

- **Name:** The name of the alert cause. The name must be unique and is not case sensitive. If the name is modified, it will change on existing key action reports.
- **Author** (display only): Properties that identify the person who created the cause on the **Alert Causes** 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.
- **Display Order** (optional): The location of the cause in the **Causes** drop-down list on the **Action**

Management page. Causes without a sequence number display in alphabetical order. The range of the display order is 30.

- **Approved:** The status of the cause is either approved or unapproved. When added from the **Alert Causes** page, the **Approved** check box is automatically selected. When suggested from the **Action Management** page, the **Approved** check box is unselected (unapproved).

From the **Alert Causes** page, you can:

- Add a new alert cause to be available in the **Alert Cause** drop-down list on the **Action Management** page. Open the **Alert Causes** page and use the **Search** field.
- Approve an alert cause.
- Edit an alert cause.
- Delete one or more alert causes that are not used and not included in a key action report.

Procedure: Approve or Reject an Alert Cause

Purpose: On the **Action Management** page, users can enter new alert causes and suggest that they are added to the drop-down list. The suggested causes display in the **Alert Causes** table on the **Alert Causes** page. The causes suggested by a user are initially unapproved.

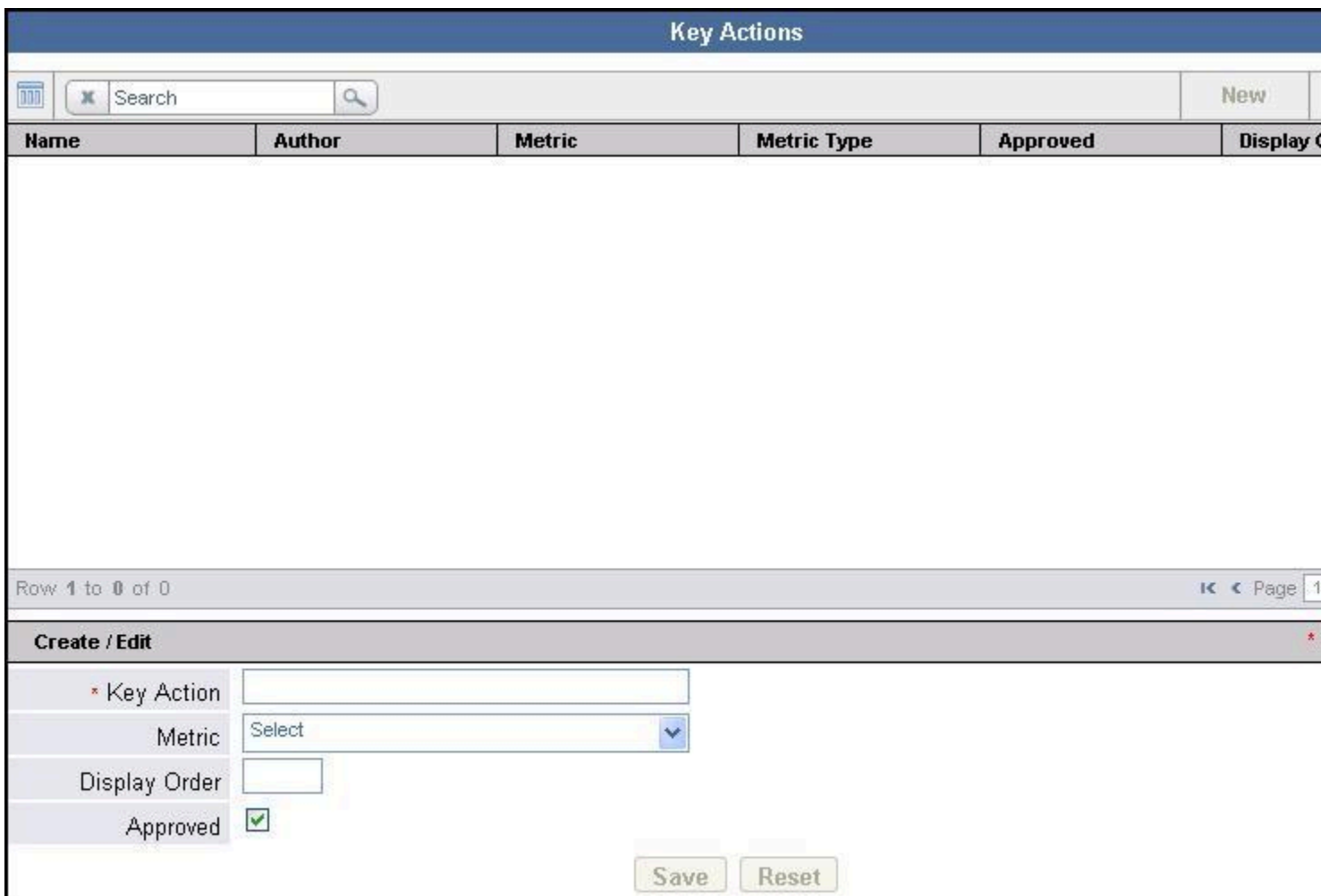
Steps

1. To add an unapproved cause to the drop-down list on the **Action Management** page:
 - a. Highlight a row for an unapproved cause in the **Alert Causes** table.
The details display in the **Details** section.
 - b. Select the **Approved** check box.
 - c. Click **Save**.
The approved cause displays in the table with a check mark.
2. To leave a cause off the drop-down list on the **Action Management** page:
 - a. Highlight a row for an approved cause in the **Alert Causes** table.
The details display in the **Details** section.
 - b. Clear the **Approved** check box.
 - c. Click **Save**.
The unapproved cause displays in the table with a symbol to indicate that is it unapproved.

Key Actions

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 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



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.

Genesys Adapters

The **Genesys Adapters** page in the Administration module is a section heading only. There are two pages in the Genesys Adapters section of the administration module:

- **Adapters**
- **Base Object Configuration**

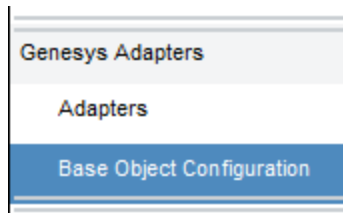
You can view information about the adapters on the **Adapters** page, but information about adapters is stored in the Platform database. You manage the adapters from the Platform database.

You can view and maintain the list of agent group, queue, and filter combinations on the **Base Object Configuration** page. See also [Base Object Configuration](#).

For more information, see [Performance Management Advisors Deployment Guide](#).

Base Object Configuration

Administration Module Navigation



Base Object Configuration link in the Administration Module Navigation Pane

The screenshot shows the link to the **Base Object Configuration** page on the Administration module navigation pane.

Access Permissions

Visibility of the agent groups and queues on the **Base Object Configuration** page is determined by the tenants to which the administrator has access. Note that the access permission is determined only at the tenant level. If the administrator has access to a given tenant, all the objects under that tenant are displayed in the **Base Object Configuration** page, irrespective of whether the administrator has access to individual objects in it. For an administrator to be able to view objects to publish in the **Base Object Configuration** page, either the user, or the user's access group, must be granted at least Read access permission to the tenants under which the administrator will be publishing the objects.

Configuring Genesys Objects

Statistics distribution is handled automatically by the Data Manager. The associations that display on the **Base Object Configuration** page are no longer tied to a selected adapter, but instead represent a global configuration for CCAAdv/WA. For more information, see [Performance Management Advisors Deployment Guide](#).

Starting in release 8.5.0, you must deploy the Contact Center Advisor application (including XML Generator) and configure the Genesys metric sources before you can use the **Base Object Configuration** page in the Administration module. Data manager requests no statistics for pre-configured objects until the CCAAdv module, XML Generator, and Genesys metric data sources are deployed and working.

On the **Base Object Configuration** page, you can:

- configure objects (queues and agent groups):
 - assign objects to filters on the **Base Object to Filter Mapping** tab
 - assign filters to an object on the **Mapping to Base Object** tab

Important

NEW Objects, such as queues or agent groups, display on the **Base Object Configuration** page irrespective of the state of those objects (enabled or disabled) in the Genesys Configuration Server. For example, if an ACD queue is disabled in Genesys Administrator Extension (GAX), that queue will still display on the **Base Object Configuration** page in the Advisors administration module. Restarting Advisors Platform has no effect; disabled queues or agent groups always display on the **Base Object Configuration** page.

- identify and filter objects by object type
- view the count of configured objects
- search each listbox

You require Read access to one or more tenants to use the **Base Object Configuration** page. You see only agent groups and queues in the **Base Object Configuration** page for the tenant(s) to which you have Read access permission.

The **Base Object Configuration** page prevents contradictory configuration. For example, if you select **No Filter** for an object, and later attempt to assign a filter, you receive an error message. You must de-select **No Filter** before a filter can be assigned to that object.

Filter categorization is not applicable for interaction queue statistics. **No Filter** is the only option you can successfully apply to interaction queues. If you attempt to combine filters with an interaction queue, the filters are discarded and the **No Filter** option is automatically selected again.

For detailed information about the filters and objects that display on the **Base Object Configuration** page, see [Data Manager content](#) in the *Performance Management Advisors Deployment Guide*.

Working with Filters on the Base Object Configuration Page

You can map filters to base objects on the **Base Object to Filter Mapping** and **Mapping to Base Object** tabs to segment a selected queue or agent group into one or more application or agent groups. The filters that are specified in the [Advisors Business Attributes section](#) in Genesys Configuration Server display on the **Base Object Configuration** page.

On the CCAdv dashboard, each filtered combination displays on a separate line. For example, if you select a queue, you can then use filter selection to achieve one of the following results:

1. If you select **No Filter** and save the No Filter/queue combination, you create an unfiltered application object.

2. If you select a specific filter and save the filter/queue combination, you create a filtered application object.

All application-level metrics are automatically filtered in the Stat Server based on the configured filtering criteria. Statistic values are reported for the filter conditions that are satisfied. For example, if the filter expression is "Agents in a Not Ready state with a reason code of Break", then only agents who satisfy that filter condition are considered when reporting the statistic value. These types of filters are applied to *all* metrics; therefore, your filter needs to be applicable to all or most metrics of a particular object type. If there are metrics that you want to exclude from the filter, then go to the **Report Metrics** administration page and select the **Exclude Base Object Filter** check box for those metrics. (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.)

You can use this method to segment the queue into multiple application line items on the CCAdv/WA dashboard. For example, you might have filters that divide the queues into segments based on the service that is provided by the agents in those queues. Another example is the use of filters to segment the queues based on the call type. Typically, Stat Server filters are specified in terms of the call-level attached data, for which Stat Server can count the statistic values when the specific filter condition is satisfied. For more information about the filter expression syntax that you can use with Stat Server, consult the [Stat Server User's Guide](#).

If you select multiple filters, the result is multiple segments.

In addition, both tabs on the **Base Object Configuration** page include a **Filters** panel with which you can refine the list of filters and objects you view on the page. For example, if you want to view only filters that are assigned to objects, select the box beside **Selected** under **Filter** and ensure the box beside **Unselected** is not checked. The list of object filters now shows only filters that have been assigned to objects. Unassigned filters are hidden.

The **Filters** panel also includes a **Search** field. Use the **Search** field to quickly find a filter or object by typing its name in the field and clicking the icon beside the field.

Procedure: Map Objects to a Filter

Purpose: On the **Base Object to Filter Mapping** tab, you select a filter and map objects to it. Use this procedure to quickly assign multiple objects to one filter. If you select **No Filter** for an object, and later attempt to assign a filter, the system prevents you from proceeding. You must de-select **No Filter** before a filter can be assigned to that object.

Steps

1. Open the **Base Object to Filter Mapping** tab.
2. Select a filter.
The list of available agent groups and queues displays in the pane to the right.
The list of filters and available objects is configured in the Genesys Configuration Server. If you do not see a filter or object that you require, contact your system administrator. Object visibility is controlled by permissions.
3. Click the checkbox beside an object to select it and assign it to the filter.
4. After you have selected the objects to assign to the filter, click **Save** to save the assignments or click **Cancel** to discard the assignments.

Procedure: Map Filters to an Object

Purpose: On the **Mapping to Base Object** tab, you can select an object and map filters to it. Use this procedure to quickly assign multiple filters to an object, and to discover what filters are assigned to an object.

Steps

1. Open the **Mapping to Base Object** tab.
2. Select an object from the list of available agent groups or queues.
The list of relevant filters displays in the pane to the right. Filters that are already assigned to the selected object have a checkmark beside the filter name.
The list of filters and available objects is configured in the Genesys Configuration Server. If you do not see a filter or object that you require, contact your system administrator. Object visibility is controlled by permissions.
3. Click the checkbox beside a filter to select it and assign it to the object.
4. After you have selected the filters to assign to the object, click **Save** to save the assignments or click **Cancel** to discard the assignments.

Control Panel

The **Notification Lists** and **Notification Templates** pages in the **Control Panel** section of the Administration module are applicable to the Resource Management Console (RMC). You must assign role-based access control (RBAC) privileges to all users who need to work with the **Notification Lists** and **Notification Templates** pages. See [CCAdv/WA Access Privileges](#) for the complete list of Advisors privileges for Contact Center Advisor/Workforce Advisor. See [AdvisorsAdministration.RMC.Notifications.canView](#) for information about the privilege required to view and use the pages in the **Control Panel**.

A good routing and resource plan based on historical data should represent a typical day. However, for unplanned events that happen during a day, **Resource Management** is available to address temporary changes to skills and skill levels, such as increased volume.

Warning

Resource Management is not intended for bulk changes and may disrupt mission critical system requests.

Launching **Resource Management** from the hierarchy is not recommended because the number of agents and agent data pulled might be very large and impact performance. Genesys recommends launching **Resource Management** from the **Agent Groups** pane, the **Applications** pane in CCAdv, or **Contact Group** pane in WA, in order to pull less than 150 agents.

Notification Lists

Notification lists are used to inform groups of users within an organization about changes being made to the agents or resources. The notification lists are simply a collection of e-mail addresses. Administrators maintain the list of e-mail addresses from the **Notification Lists** page on the Administration module. These addresses are linked to the actions of Resource Management.

From the **Notification Lists** page, you can:

- View the e-mail addresses on a notification list by selecting a single row in the table. The row expands to show the e-mail addresses.
- Delete an e-mail address.
- Search for an e-mail address.
- Add a notification list.
- Delete a notification list that is no longer used. Note that multiselection (for deletion) is not available for Notification lists (including e-mail addresses within a notification list) or Notification templates.
- Update an existing notification list.
- Reset the updates to a notification list before it is saved.

Procedure: Add a Notification List

Steps

1. On the navigation bar, click **Notification Lists**.
2. Click **New**.
The **Add/Edit Notification List** page displays.
3. Type a name for the notification list.
4. To add an e-mail address, type one in the **Add E-mail** field and click **Add**.
5. Click **Save**. If you are adding multiple email addresses to create a notification list, be sure to click **Save** after you add each address. That is, type an email address in the **Add E-mail** field, click **Add**, and then click **Save** before adding the next email address.

Procedure: Edit a Notification List

Steps

1. On the navigation bar, click **Notification Lists**.
2. Click the **Edit** icon next to the notification list that you want to edit.
The **Add/Edit Notification List** page displays. The details display in the **User's E-mail** section.
3. Update the name of the notification list.
4. To add a new e-mail address, type one in the **Add E-mail** field and click **Add**.
5. Click **Save**. If you are adding multiple email addresses to the notification list, be sure to click **Save** after you add each address. That is, type an email address in the **Add E-mail** field, click **Add**, and then click **Save** before adding the next email address.

Procedure: Delete an E-mail Address from the List

Steps

1. On the navigation bar, click **Notification Lists**.
2. Click the **Delete** button next to the e-mail address you want to delete.
The following message displays: Do you want to delete the selected item?.
3. Click **Yes**. The item is removed from the table.
Click **No** to cancel the deletion. The confirmation dialog closes and the item remains in the table.

Notification Templates

Notification templates provide standard content for e-mails that describe the directives and actions taken from Resource Management. Notification templates are preconfigured messages that users can send to affected agents (and users) who are on notification lists. Administrators maintain notification templates from the **Notification Templates** page. Templates can also be created dynamically (while using Resource Management); however, they must be managed from the **Notification Templates** page.

Notification Templates Page

From the **Notification Templates** page, you can:

- Add a notification template. If you have permission, you can create up to 50 distinct templates.
- Delete a notification template that is no longer used. Note that multi-selection (for deletion) is not available for notification lists (including e-mail addresses within a notification list) or notification templates.
- Update an existing notification template.
- Reset the updates to a notification template before it is saved.

Notification templates are composed of the name of the template and its contents.

Sample Notification Templates

Use the examples in this section as a guide if you are creating notification templates for use in your enterprise.

Examples of Skills Change Statements

The following statements are examples of notifications that could be sent for changes to skills:

- The following skills have been added: <list skill name and level>
- The levels of the following skills have been changed: <list skill name and new level>
- The following skills have been removed: <list skill name>

Examples of E-mail Notification Templates

The following table shows examples of e-mail formats for notification templates. In the Resource Management Console, a user can add to or change the text in a notification template when that template is selected for a notification message. For example, the message that a supervisor chooses to send to individual agents might differ from text sent to notification lists, when the latter can be

selected in the workflow.

Action	E-mail Subject	E-mail Body
Status Change	Notification of Status Change	Your status has been changed to <new status inserted here>
Status Change	Notification of Status Change	The status of the listed agents in agent group <Insert agent group name here> has been changed to <Insert new status here>. Agents Affected <Insert list of agents from this agent group here>
Status Change	Notification of Status Change	The status of the listed agents in agent group <Insert agent group name here> has been changed to <Insert new status here>. Agents Affected <Insert list of agents from this agent group here>
Skill Change	Notification of Skill Change	Your skills have been changed. <Insert statement about how skills have been changed>.
Skill Change	Notification of Skill Change	The skills of the listed agents in agent group <Insert agent group name here> have been changed. <Insert statement about how skills have been changed>. Agents Affected <Insert list of agents from this agent group here>
Skill Change	Notification of Skill Change	The skills of the included agents have been changed. <Insert statement about how skills have been changed>. Agents Affected: <Insert list of agents here>
General Notification	<title of template>	Message From the Operator: <Insert comments>

Logs

For information about logs, including which actions are logged and how to configure audit logs, see [logging information](#) in the *Performance Management Advisors Deployment Guide*.