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Frontline Advisor Manager Help

Pulse Advisors 8.5.1

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Welcome to Frontline Advisor Manager Help

The Frontline Advisor Manager interface gives you a real−time view of agent activity. Customizable alerts draw immediate attention to agents who need coaching and enable you to more effectively manage results and performance−related activity, good, or otherwise.

The real−time data enables you to correct problems and reinforce progress as it happens, not after the break or during the next shift. Frontline Advisor puts everything you need to pay attention to in a single location, so you can capture the priority issues and quickly direct your attention to the agents who need coaching.

Current status, performance, behavioral, or activity−based data can be presented in customized views. Sophisticated, configurable business rules monitor key performance indicators and then notify you of situations requiring immediate attention.

The alert activity in Frontline Advisor and Agent Advisor makes agent activity trends more obvious, which increases efficiency so you have more time to spend with agents.

Role-Based Access Control

Access to alerts, metrics, and hierarchies is controlled by roles defined by the administrator (role−based access). This means that you can see only alerts, metrics (and reports that concern such metrics), and hierarchies/nodes to which the administrator specifically grants access.

Metrics and Alerts

When you have access to a metric or alert:

- You see the metric on the dashboard.
- You see the metric on the column chooser.
- You see alerts for the metric.

Hierarchy Access

Role−based access control means that you might not be able to navigate to all child nodes in the hierarchy. Only those child nodes are displayed to which specific access has been granted by administrators. For example, this might permit a group leader to see all teams and agents under them, but only the aggregated values at higher−level nodes in the hierarchy.

In order to perform threshold or rule overrides at any given node, you must have specific change permission for that node. In the above example, the group leader could be granted change access at the group level and below, but not at higher−level nodes, because this would affect other groups that the group leader cannot see.

Accessibility

Users with visual impairment can work with the hierarchy monitoring pages of Frontline Advisor using an accessibility interface. Frontline Advisor supports JAWS Standard version 11, an accessibility interface that provides a series of keyboard shortcuts for navigating the tabulated information on the screen. The screen contents are translated into voice in the local language.

The Frontline Advisor accessibility interface supports Internet Explorer 6 and higher (Genesys recommends that you use Internet Explorer 8).

To log in to the accessibility interface use the URL specific to your enterprise.

Language options are dependent on the version of Advisors used in your enterprise. The login page URL uses the following format:

```
http(s)://<server>[:port]/fa/accessibleSupervisorDashboard?[language=<en|de|fr>]
```

When the login page is loaded, the software prompts you to enter your user name and password.

To exit from the accessibility interface, press "B" on your keyboard.

Printing Options

When the **Print** button is selected, you can create a PDF, then select print features for the selected printer (paper size, font family, font size, and paper orientation) from a print dialog.

Using Frontline Advisor

Frontline Advisor is designed to help supervisors raise the performance of agents, enabling them to instantly identify agent activities that need correction or additional training, as well as areas where agents are performing optimally.

Using Frontline Advisor Manager Console

The Manager console is divided into four panes:

- **Hierarchy** view—Contains the groups that aggregate agents and other groups in your monitoring hierarchy. The groups may represent divisions, groups reporting to a manager or supervisor and teams. You can see only those groups to which you have permissions set by the administrator.
- **Team** view—The agents' overall status activity in real time.
- **Agent Alerts** view—The details of the alerts based on rules for a selected agent.
- **Team Alerts** view—The details of the alerts based on rules for all agents on the selected team.

Agents' call statistics continue to accumulate until the relevant time period ends even though the agent might be logged off.

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

See the Welcome page for more information about hierarchy access.

Important

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 Frontline Advisor in Google Chrome, and you want to open an additional session or some other Advisors dashboard in another browser window, then that browser must also be Chrome.

Monitoring Hierarchy

The **Hierarchy** pane contains the groups that aggregate metric values for agents in your monitoring hierarchy. The groups may represent divisions, groups reporting to a manager or supervisor, and teams. You can see only those groups or nodes to which you have permissions set by the administrator. An agent team is found only at the lowest level of the monitoring hierarchy.

The count of alerts (that is, triggered rules) rolls up through all levels of the monitoring hierarchy.

You can search for a team or supervisor node by entering a name in the **Search** field. The search is limited to the hierarchy nodes that are visible. If the matched name is a team, the team's agents are displayed on the **Team** pane. If the matched name is a group reporting to a specific supervisor, the **Team** pane is cleared.

Tooltips provide descriptions and channels (Voice, Email, or Web Chat) for the metrics that you are monitoring on the **Hierarchy** pane.

- To display tooltips, move your cursor over any metric column header in the **Hierarchy** pane.

The tooltip contains the metric display name, as well as a description of that metric.

See the Welcome page for more information about hierarchy access.

Selecting a Team of Agents to Monitor

To monitor a team of agents, navigate the **Hierarchy** view until you find the agent team you need to monitor. Agent teams are marked with a yellow flag icon .

Once an agent team is selected in the **Hierarchy** view, the **Team** view displays the activity of individual agents.

Important

If the number of agents logged in is less than the Min Agent count set for the team, then performance metrics are displayed as N/A in the Hierarchy pane; The Team pane displays the values as normal.

Monitoring Using Thresholds and Rules

Thresholds and rules are defined by the administrators. Thresholds define the critical, warning, and acceptable conditions for each metric for one or all time profiles. Thresholds and rules can be used to find positive behavior as well.

Default values for thresholds and rules are provided on installation; however, they can be inherited or overridden by administrators. When modified at the global level, the values for all enabled teams and agents are automatically updated.

Thresholds

A threshold compares a measured value at a point in time to a threshold range to determine the status. Depending on the metric, a value may be acceptable above or below a certain value. Some thresholds trigger an alert if the value is below or above defined values.

If value is...	Value 1...	And...	Value 2...	Result
greater than	the value in the 4th text box			then the value is critical high (red)
greater than	the value in the 3rd text box	less than or equal to	the value in the 4th text box	then the value is warning high (yellow)
greater than or equal to	the value in the 2nd text box	less than or equal to	the value in the 3rd text box	then the value is acceptable (no color is displayed)
greater than or equal to	the value in the 1st text box	less than	the value in the 2nd text box	then the value is warning low (yellow)
less than	the value in the 1st text box			then the value is critical low (red)

The four text boxes are colored to provide a visual cue for the status.

- Red indicates a critical value range.
- Yellow indicates a warning value range.
- No color displayed indicates an acceptable value range.

The system setting for how often the metrics are calculated (that is, the performance calculation interval) is 10 minutes for the purposes of the following examples.

Example 1

For an average of three−minute calls, handling two or more calls but less than or equal to five calls is acceptable (no color).

Handling one call is yellow.

Handling fewer than one call is red.

Handling more than five calls but fewer than or equal to eight calls (that is, the calls are too short) is yellow.

Handling more than eight calls (that is, short−calling) is red.

Example 2

In this example, handling two or more calls but fewer than or equal to five calls is acceptable (no color).

Handling one call triggers a warning (yellow).

Handling fewer than one call or more than five calls is a critical (red).

NCH	1	2	5	5

Example 3

In this example, handling one or more calls but fewer than or equal to five calls is acceptable (no color).

Handling more than five calls but fewer than or equal to eight calls triggers a warning (yellow).

Handling fewer than one call or more than eight calls is a critical (red).

NCH	1	1	5	8

Rules

Rules are conditions that continuously monitor agent metrics. For example, an agent has more than 10 agent calls transferred in the past 10 minutes. Once a rule is triggered, an alert is generated. Alerts help to focus your attention on the most important issues affecting performance. Rules also count events throughout an interval of time, which allows them to trigger on the frequency of events. The frequency of an alert is a leading indicator of good or bad trends. It is good practice to learn to make use of alerts to quickly focus on where to take action now.

Rules evaluate and trigger on agent metrics, but not for team metrics.

Thresholds and rules should be aimed at highlighting significant situations and be very useful. Ideally, the number of alerts should be low: one or two per agent per day can lead to very effective coaching. Or, you might set rules to monitor only one or two types of situations a week. The rules could be changed to tighten the triggering numbers in a future week (to “raise the bar”) or, once good performance is achieved, new rules could be defined to move to new areas of performance.

Types of Threshold and Rule

The five types of thresholds and rules are:

Class	Explanation	Action
Threshold	Based on a count	Change text red or yellow
Threshold	Based on an average or maximum time value	Change text red or yellow
Threshold	Based on the duration of an agent’s state	Change text red or yellow
Rule	Based on the frequency of calls held or calls transferred	Issue a red alert
Rule	Based on the frequency of (long or short) call durations or wrap times	Issue a red alert

Agent Rule Alert Indicators

 Red indicates at least one critical alert.

 Green indicates no alerts are active: the value is normal.

 A gray icon indicates the agent is not logged in.

Team View

> **Important**
>
> Access to metrics and alerts is controlled by user roles defined by your administrator (role−based access). Only metrics to which you have access are displayed in the **Team** view. The entire **Team** view can also be suppressed based on role−based access control.

The **Team** view is where you can focus on the teams' overall status in real time. In addition to performance information, Frontline Advisor tracks and records all exceptions and enables you to enter coaching information to support positive and negative feedback. You describe your actions for dealing with the alert in a note. The note becomes part of the recorded history of the agent.

Information in the **Team** view is updated and refreshed by default every 10 seconds for state data and by default every 10 minutes for performance data. The refresh rate is configured by the administrators.

Some default columns include:

- **Agent Name**—When available, this column displays the first initial, or first name in later versions of Advisors, followed by the last name of the agent. If the agent's name has not been supplied, the agent's email address is displayed, or if that is not available, the agent's user name.
- **DN** — The agent's extension or ACD position in a voice environment, or, in a multimedia environment, the channel into which the agent is logged. The **DN** column of the **Team** pane can display any of following values:
  - N/A: The agent is logged out of all channels.
  - Agent's extension or ACD position plus the name of the associated switch: The agent is logged in to a voice channel only. For example, `1112@SIP_1`.
  - A DN that specifies a multimedia channel: The agent is logged in to a multimedia channel only. For example, `chat` or `email`.
  - Agent's extension or ACD position plus the name of the associated switch and a multimedia channel identifier: The agent is logged in to both a voice channel and a multimedia channel. For example, `1112@SIP_1, email`.
- **Agent Skills**—The skill list for the agent, including the level of each assigned skill. Skills are arranged alphabetically.
- **Alert State**—The agent’s current alert state is indicated by a colored icon. In addition to red and green, a gray icon indicates the agent is not logged in.
- **State**—The agent’s current state. The following table lists the available agent states, grouped alphabetically.

After Call Work	Call Conferenced	Logged Off	Ready

Agent Work Not Ready	Call Dialing	Logged On	Not Ready
	Call Held	Monitored	Talking
	Call Initiated	Not Monitored	
	Call Internal	Off Hook	
	Call Outbound	On Hook	
	Call Unknown		

- **Time in current state**—The amount of time that the agent has been in the current state (minutes:seconds).
- **Reason Code**—A code indicating the reason for the agent's most recent change of state.
- **Agent ID**—The agent’s identification.
- **Login Time**—The login date and time of the agent.
- **Current Skill**—The agent’s current skill (column availability is dependent on the Frontline Advisor configuration in your enterprise).
- **Call Type**—The current call type (column availability is dependent on the Frontline Advisor configuration in your enterprise).

> **Important**
> If the number of agents logged in is less than the Min Agent count set for the team, then performance metrics are displayed as N/A in the Hierarchy pane; The Team pane displays the values as normal.

Filtering the Team View by Agent Skills

You can filter the **Team** view by agent skills. There is a **Skill** filter at the top of the **Team** view. Enter a skill, either the full or a partial skill name, in the filter field and click . The **Team** view now displays only agents whose skill names include the search string you entered.

You can filter by agent skills even if the **Agent Skills** metric column is not showing in your **Team** view; that is, the metric might be hidden from display based on settings in the Column Chooser, but you can continue to filter your list of agents based on specific agent skills.

To clear the **Skill** field, click .

Agent Alerts

Important

Access to the **Agent Alerts** pane is controlled by role−based access.

The details of agent alerts are displayed in the **Agent Alerts** view.

To display the alerts for an agent, select their name in the **Team** view.

The agent's name displays beside the **Agent Alerts** view. Active alerts are those for which the rule is currently being violated; the **Alert** column for these alerts shows a red alert symbol. You can change the order of the columns by dragging them into place with your mouse. Click in the **Note** column beside an alert to add a note that describes how you coached the agent and dealt with the alert.

The details of the **Agent Alerts** view include:

- **Alert**—The alert's status (red/green).
- **Alert Detail**—The rule description.
- **Time**—The time when the alert was triggered on the current day (hh:mm).
- **Note**—A note about the alert from the supervisor.

Team Alerts

> **Important**
>
> Access to the **Team Alerts** pane is controlled by user roles defined by your administrator (role−based access). If you cannot view agent−level data on the **Team** pane, you cannot view the **Team Alerts** pane either.

The details of alerts for all agents on the selected team are displayed in the **Team Alerts** view. The team’s name displays beside the **Team Alerts** tab. The alerts are either active (red) or inactive (green).

- Active alerts are rule violations for which the agent is currently violating the rule.
- Inactive alerts are rule violations for which the agent has corrected the behavior.

Inactive alerts are archived once the agent keeps the behavior corrected for a time equal to the time period of the rule.

The alerts are displayed in reverse chronological order.

You cannot view alerts on the dashboard once they are archived. An alert is archived at the following times:

- When the agent keeps his or her behavior corrected for a time equal to the time profile of the rule.
- At system startup, but only if the last violation time exceeds the time period of the rule.

The details of the **Team Alerts** view include:

- **Alert**—Alert state is indicated by the color of the icon (red or green).
- **Agent**—First initial and last name of each agent who had any alerts.
- **Alert Detail**—The rule description.
- **Time**—The time when the alert was last triggered (hh:mm).
- **Note**—The text a supervisor provides for the alert. A note can be added only in the **Agent Alerts** view, but it displays in both the **Agent Alerts** view and the **Team Alerts** view.

Printing The Current View

> **Important**
>
> Access to metrics and reports concerning them is controlled by user roles defined by your administrator (role−based access). Only metrics to which you have access are displayed in the current view.

If you work in a role that has permission to print reports, you will see the **Print** button () on your dashboard. If the **Print** button is available on your dashboard, then you can print the current view in a formatted report by clicking the **Print** button. The data is formatted as a PDF report and can be saved or opened using a PDF Viewer, or printed. You can select print features for the selected printer (paper size, font family, font size, and paper orientation) from a print dialog.

The report displays the following:

- The **Hierarchy** view
- The **Teams** view
- The **Agent Alerts** view
- The **Team Alerts** view

The PDF document displays all the data that is currently displayed on the dashboard in the separate sections mentioned above. The details of the printout do not include the values in columns that are not displayed on the Dashboard.

User Status/Violation Status Button

You can display the **User Status/Violation Status** button to monitor the status of rule alerts while Frontline Advisor runs in the background.

When your behavior trigger an alert, the icon becomes red.

> **Tip**
>
> You may want to keep the **User Status/Violation Status** button on your desktop, then if it changes color, open Frontline Advisor to see the details.

Customizing The Display

> **Important**
> Access to metrics is controlled by user roles defined by your administrator (role−based access). Only metrics to which you have access are displayed.

The following topics describe options for customizing the display of Frontline Advisor:

- Filtering the Dashboard Display
- Choosing Metric Columns
- Ordering the Metrics
- Sorting the Views
- Adjusting the Width of Columns
- Resizing the Views
- Searching
- Persistent Settings

Filtering the Dashboard Display

Important

Access to metrics and their time periods is controlled by user roles defined by your administrator (role−based access). Only metrics and time periods to which you have access are displayed in the dashboard display.

You can filter the dashboard display by time period and/or by channel. At the top of the dashboard there is a filters toolbar.

In this example, the **Time Profile** (10Min, 30Min, and 8Hour) and **Channel** buttons (Voice, Web Chat, and E-mail) are on/off toggles, so you can choose to display metrics for any combination of these time periods and channels on your dashboard.

Using the Column Chooser to Select Metrics

Important

Access to metrics and their time profiles and hierarchies/nodes is controlled by user roles defined by your administrator (role−based access). Only metrics and time profiles and hierarchies⁄nodes to which you have access are displayed in the **Column Chooser**. If you have no such access, you cannot change the column display.

- For additional information about any of the metrics, see the Advisor's Metrics Reference Guide.

Overview

Use the **Column Chooser** to select the metrics to display on your dashboard. You can select many metrics for multiple time periods and for multiple channels (for example, voice, Web chat, or e-mail).

The **Column Chooser** has two panes:

- **Selected Metrics**—The metrics to display on the dashboard. You can select and move metrics from this pane to the **Available Metrics** pane.
- **Available Metrics**—All available metrics that are not in the **Selected Metrics** pane. Metrics on the **Available Metrics** pane do not appear on your dashboard. You can select and move metrics from this pane to the **Selected Metrics** pane.

You can change the size of the display area on the **Selected Metrics** and **Available Metrics** panes by dragging the splitter between the two panes.

Specifying the Metrics to Display on the Dashboard

To specify the metrics that appear on your dashboard:

1. Click the **Column Chooser** button to open the **Column Chooser** window.
2. Use the **Select** drop-down menu to choose the list of metrics to display on the **Selected Metrics** pane. The options are described in the Column Chooser Feature Descriptions table. You can then add to or remove metrics from this initial list.
   - To *remove* a metric from your dashboard display, click the yellow pin icon in the row for that metric in the **Selected Metrics** pane. The metric moves to the **Available Metrics** pane. The metric no longer appears on your dashboard after you click **OK** to apply your changes.

- To *add* a metric to your dashboard display, click the pin icon in the row for that metric in the **Available Metrics** pane. The metric moves to the **Selected Metrics** pane. The metric appears on your dashboard after you click **OK** to apply your changes.
- To *filter* the list of metrics that appear on the **Available Metrics** pane, use the options at the top of the **Available Metrics** pane. The options are described in the Column Chooser Feature Descriptions table.
- To *find* a specific metric on the **Available Metrics** pane, enter text in the **Search** field. For example, to find any metric with "handled" in the name or description, enter "handled" in the **Search** field, and then click beside the **Search** field or hit **Enter** on your keyboard.

3. Optionally, *sort* the metrics on the **Available Metrics** pane by clicking on column headers.

Column Chooser Feature Descriptions

The following table describes additional features of the **Column Chooser** window.

Feature	Description
Select drop-down menu	Use this menu to specify which metrics display on the **Selected Metrics** pane. Options include: • From Dashboard: the **Selected Metrics** pane displays the metrics in the order in which they appear on the dashboard. This is the default option. • Default: the **Selected Metrics** pane displays the metrics that are shown by default on the Dashboard.
Available Metrics pane filter options	Use the filters on the **Available Metrics** pane to more efficiently find specific metrics to add to the **Selected Metrics** pane. For example, to include metrics for the Voice channel and exclude metrics for the E−mail and Web Chat channels, ensure that the Voice check box in the **Channels** filter is selected and the E−mail and Web Chat check boxes are cleared. The filter options in the **Available Metrics** pane include: • filter by Channel • filter by Object Type • filter by Metric Type • filter by Time Period • filter by initial letter of the metric name
OK button	Applies the selected metrics to the dashboard, closes the **Column Chooser** window, and saves the following to your preferences:

Feature	Description
	• filters states • selected metrics and their order
Cancel button	Cancels the changes that are not yet applied and closes the **Column Chooser** window.

Ordering the Metrics

You can change the order in which the metrics display on the dashboard by dragging a column heading to another location in the view. Note that you cannot move columns by dragging column headings in the Column Chooser.

Sorting the Views

The ability to sort information within the panes on the supervisor dashboard is controlled by user roles defined by your administrator (role−based access). You can sort information within the **Team**, **Agent Alerts**, and **Team Alerts** views if your role includes these privileges. Sorting is not provided for the **Hierarchy** view.

If your role includes the ability to sort information, records are displayed on your dashboard in the order in which they are received from the server. Sort the information in a view by clicking a column heading. You can sort the view in ascending or descending order.

> **Tip**
> Sorting by the **Alerts** column is a great way to see all red alerts first. A sort triangle indicates the direction.

The sort order you set persists if you log out and back in.

If your role does not allow you to sort information, the default sort order of records is first by logged in agents, then by last name.

Adjusting the Width of Columns

If one or more columns are either added to the display or removed from the display, the width of the columns adjusts accordingly.

There is a minimum default width.

Adjust the width of individual columns by dragging the pointer when it changes to a  near the column break.

Resizing the Views

You can resize the height of each view by dragging the splitter up or down.

Searching

You can search for:

- Supervisor and agent names in the **Teams** view.
- Alert details and notes in the **Agent Alerts** view.
- Agent name, alert details, and notes in the **Team Alerts** view.
- Agents, teams, and supervisors in the **Hierarchy** view.

To search, type your search text in the **Search** field and click . Searching finds the next occurrence of the search text from the current cursor location and highlights it. The **Search** function finds matches amongst the visible nodes only; closed nodes are not searched.

To find the next occurrence, click  again. Searching continues from the current location and wraps around the end to the beginning.

To clear the **Search** field, click .

Searching for Agents based on Skills

In the **Team** view, you can search for agents based on their skills, however you must use the **Skill** filter at the top of the **Team** view for this type of search. See Filtering the Team View by Agent Skills for information.

Persistent Settings

Logging out and then back in (to any machine) or returning from another module in the Advisors Browser retains the following:

- Column selection, sorting, and widths.
- Location of the splitters.
- Hierarchy node selection.

Keyboard Shortcuts

Keyboard shortcuts can be used in conjunction with screen reader accessibility software, as an alternative to the standard browser navigation. Frontline Advisor supports JAWS Standard version 11. The following keyboard shortcuts, used in JAWS Standard version 11, are implemented:

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