Contact Center Advisor and Workforce Advisor Help

Pulse Advisors 9.0.0

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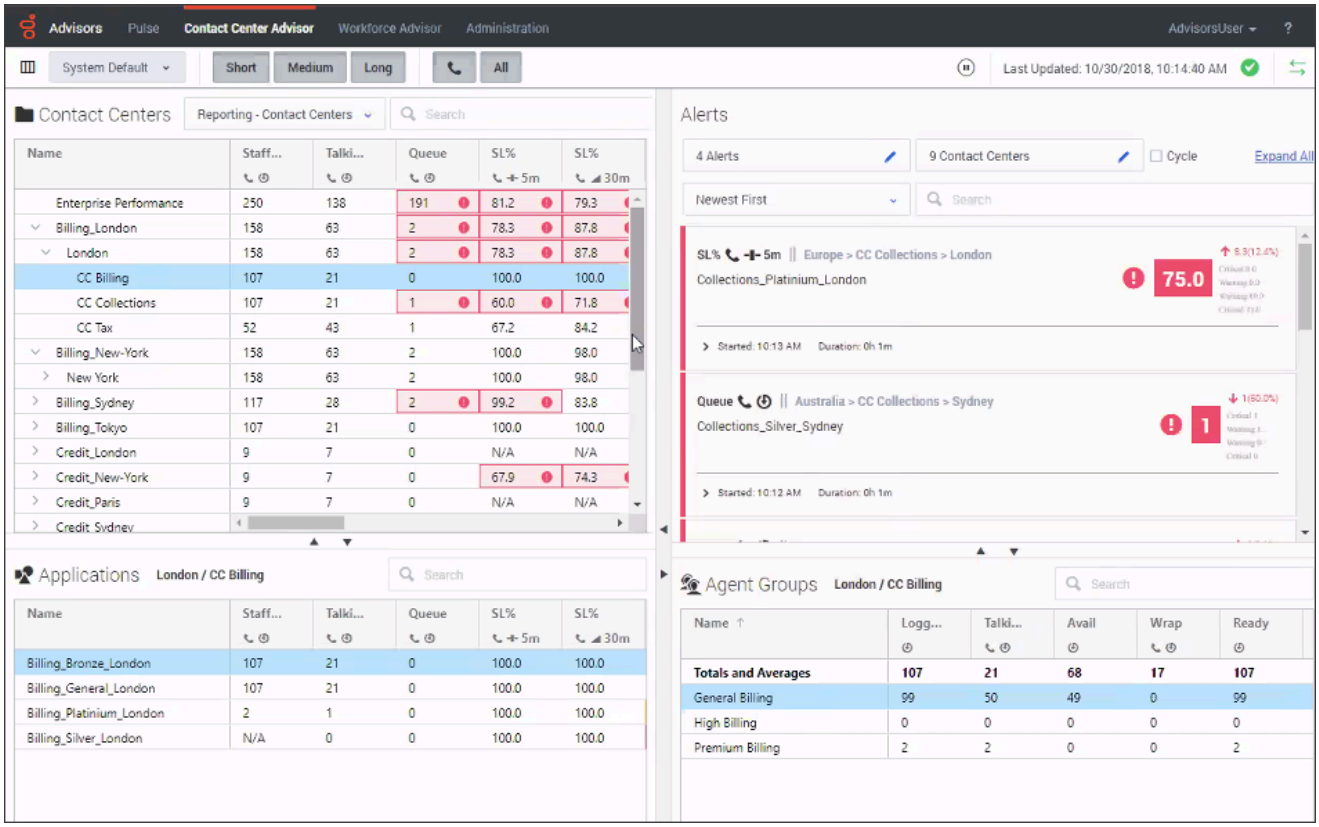
Genesys Contact Center Advisor and Workforce Advisor Help



Contact Center Advisor (CCAdv) and Workforce Advisor (WA) display real-time contact center activity so you can view operations from a central point of reference. For example, if one of your contact centers experienced a sudden drop in service levels for some reason, you would know about it immediately if you were monitoring that in Contact Center Advisor. You choose the business priorities for your enterprise and select the metrics that supervisors and managers will monitor to effectively manage those activities. In addition, you can configure conditions such as thresholds for application and contact group metrics so you receive alerts on the dashboard and designated users are notified in email when there is a problem.

Workforce Advisor complements CCAdv by integrating workforce data (that is, data from certain workforce management systems) to enable the proactive management of agent schedule adherence. For example, WA calculates the deviations between actual and scheduled (*forecast*) metrics such as the amount by which the actual average handle time (AHT) deviates from the forecast AHT or the amount the actual staff deviated from the scheduled staff. For more

information about the metrics available for use with CCAdv and WA, see the *Pulse Advisors Metrics Reference Guide*.

Viewing CCAdv and WA Dashboards Using a Mobile Device

Starting with Advisors release 9.0, you can view your CCAdv or WA hierarchy and alerts on your mobile device. The Advisors mobile view is designed to be an express service that lets you easily view the **Contact Centers** pane and the **Alerts** pane on any mobile device that has a supported browser. For additional information about the mobile view, see CCAdv/WA Mobile View Dashboard.

Accessibility Interface

The Advisors products include an accessibility interface for users with visual impairment. For more information, see Accessibility.

Role-Based Access and Permissions

Access to business objects (regions, contact centers, application groups) and metrics is controlled by roles defined by the administrator (role-based access). When you do not have access to these objects, you cannot see them or work with them in their respective panes on the dashboard. Access to base objects (applications, contact groups, and agent groups) depends on your access to the associated business objects. Therefore, on the dashboard, you can only see objects and metrics (and alerts about such metrics) to which the administrator specifically grants access.

Accessing Metrics

When you have access to a metric, you can see it in the following places:

- On the dashboard
- On the Column Chooser

You can also graph the metric, see alerts for the metric, and receive alert notifications. (To see alerts and receive notifications, you must have access to the metric, geographic region, contact center, and application group of the alert.)

Accessing Other Objects

Role-based access also controls your ability to see and use the following objects and views in the interface:

- Enterprise row in the Contact Centers pane
- Column Chooser button
- The Agent Group pane
- Grouping drop-down list
- Change Password menu
- Administration module

Using the Dashboard

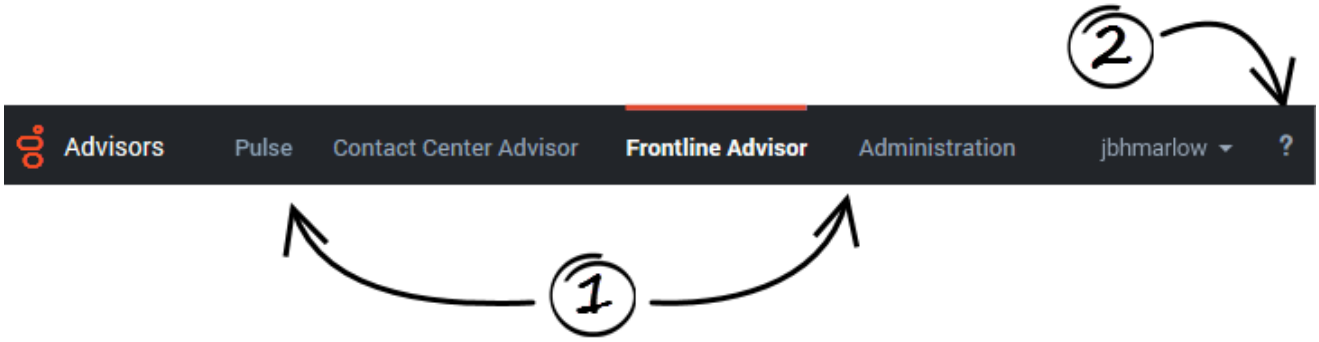
The information on this page describes Advisors application and dashboard usage and characteristics in general terms, and includes the following sections:

- Navigating Advisors Applications
- Stored User Preferences

Navigating Advisors Applications

Depending on your role in the Contact Center, you might have access to only one Advisors application, or you might have access to multiple applications. Use the Advisors navigation bar to open any Advisors dashboard to which you have access.

Role-based access and permissions control what you can see and do in each Advisors application. For more information about this topic, see Role-Based Access and Permissions.



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

Stored User Preferences

Many of your dashboard settings are saved and stored immediately, as you make changes. For example, let's say that you increased the width of the **Alerts** pane, and then switched to another Advisors application from the dashboard's navigation bar, or maybe you accidentally closed the browser (without logging out). When you return to the Contact Center Advisor or Workforce Advisor dashboard, the **Alerts** pane will have retained the width that you set before you opened a different dashboard or closed the browser.

The following dashboard settings are stored:

- filter settings, such as the time profile group and channel filter settings
- metric sequence
- column sorting
- column widths
- row selection and expansions
- the location of the splitter
- the grouping
- the last-selected module

Related Information

This section of the Help document also contains the following, related topics:

- Viewing contact center data
  - Working with Contact Center Advisor
  - Working with Workforce Advisor
- Alerts
  - Working with the Alerts Pane
  - Viewing Alerts
  - Searching and Filtering Alerts
  - Alerts Pane Attributes
- Customizing the dashboard
  - Column Chooser
  - Metrics Library
- Accessibility

Viewing Contact Center Data

The Contact Centers pane (or the hierarchy) enables you to monitor operations from a high level. You can expand the hierarchy to the lowest level to carry out root cause analysis, based on the violations highlighted in the tables or the alerts in the **Alerts** pane. The ways in which you can view data in the Contact Centers pane differs, depending on whether you are in CCAdv or the WA.

There are also many common ways to change or customize all views. These are described in the sections below.

> **Important**
>
> To find other ways to change or customize the views that are specific to the Contact Centers pane you are using, see the Working with Contact Center Advisor or Working with Workforce Advisor topics in this help system.

In Contact Center Advisor, you can view data in the Contact Centers pane, Applications pane, and Agent Groups pane.

In Workforce Advisor, you can view data in the Contact Centers pane, Contact Groups pane, and Agent Groups pane.

Highlighting the Relationships Between Base Objects

In Contact Center Advisor, highlight the relationship between applications and agent groups:

- To highlight the agent groups, select an application in the **Applications** pane.
- To highlight the associated applications, select an agent group in the **Agent Groups** pane.

CCAdv refreshes the relationships on startup and then once a day, overnight. Therefore, if the highlighting does not work as you expect, you may need to wait until the next day for this to happen.

In Workforce Advisor, highlight the relationship between contact groups and agent groups:

- To highlight the agent groups, select a contact group in the **Contact Groups** pane.
- To highlight the contact groups, select an agent group in the **Agent Groups** pane.

Finding Data in the Dashboard Panes

Common ways in which to find additional information in the dashboard panes, or to better view displayed data, are the following:

- Expanding the regions in the Contact Centers pane—Select the arrow icon (). The selected row remains highlighted until you select another row that changes the information in the Applications pane in CCAdv or in the Contact Groups pane in WA.
- Displaying the technical name for an application, contact group, or agent group—If provided, the descriptive name displays in the pane. To display the technical name, put your cursor over the descriptive name.
- Sorting a column in ascending or descending order in the Applications, Contact Groups, or Agent Groups pane—Click the header of the respective column.
- Changing the width of a metric column—Click a vertical line between two metrics, then drag left or right.
- Displaying a metric description in a tooltip—Place the mouse pointer over a metric column header.

Checking the Health of the Dashboard

A data source status indicator () displays on the toolbar, only in Contact Center Advisor. The indicator changes from green to red () if an external data source has not updated within a configured time frame. When it is red, if you put your cursor over it, it will show you the name of the external data source that has not updated. Designated individuals are typically notified by email when a violation is triggered. An administrator in your Contact Center configures the distribution list for this type of email notification, if it is required.

In addition to the data source status indicator, a data connection status indicator () displays on the toolbar in both Contact Center Advisor and Workforce Advisor. This indicator changes to red () when the dashboard cannot detect any data to display.

Pausing Dashboard Updates

You can pause the dashboard if you want to temporarily halt the automatic data updates. For example, you might want to analyze data in detail, or discuss some aspect of the information currently in your dashboard with a colleague. To pause the data flow to your dashboard, click the **Pause** button () on the toolbar. The button changes to a **Play** button  . Pausing the data flow causes the data connection status indicator to change to yellow (); this is normal behavior.

To resume data updates using the toolbar buttons, click **Play**. The button changes back to the **Pause** button, the data connection status indicator changes to green (), and the real-time updates resume.

Resizing the Panes

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

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

Open and Close Times

The open and close times of contact centers represent the official time for active data analysis. During non-operational hours, summaries that draw data from base objects related to the contact centers (such as regional or application summaries) are calculated without that information.

In addition to actual open and close times for a contact center, there are other factors that can cause a contact center to not appear on the dashboard:

- The *effective date* for the contact center is at some future time (that is, the contact center is not open for business yet).
- The *expiration date* for the contact center has passed (that is, the contact center is not open anymore).
- The contact center has been made inactive by the administrator, in which case Contact Center Advisor treats it as if it were always non-operational.

Understanding the Threshold Violations

Thresholds define the critical, warning, and acceptable conditions for each metric. A threshold is defined in the context of one application group. You, or another administrator or supervisor in your contact center, can specify an acceptable value or range of values for each combination of metric and application group.

A threshold on a metric's value is applied to the value in all of the metric's time profiles.

Highlighting in table cells on the **Contact Centers** and **Applications** (CCAdv) or **Contact Groups** (WA) panes indicates that a threshold violation has occurred.

The color of a threshold violation is meaningful:

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

The color of the threshold violation that displays in the **Contact Centers** pane is dependent on the color of the violation in applications or contact groups related to the object in the level of the Contact Centers pane:

- If all of the threshold violations in the related applications or contact groups are yellow, then the threshold violation color for the metric for the affected object in the **Contact Centers** pane is also yellow.
- If at least one violation for a metric in the related applications or contact groups is red, then the violation color for the metric for the affected object in the **Contact Centers** pane is red. The highest severity violation determines the color of the violation in the **Contact Centers** pane.

A red violation in the **Contact Centers** pane might appear misleading if most of the threshold violations on related applications or contact groups in the pane below are yellow. But the color is displayed to call attention to the worst level of violation found in the the related objects.

Threshold violations display as either an outlined table cell or as a solid-colored table cell:

1. An outlined table cell displays at the aggregation level and indicates that there is at least one threshold violation somewhere within the aggregation group. (Advisors dashboards do not capture group performance metrics; rather, they indicate group performance by aggregating the metric values of measurable objects at lower levels of the hierarchy, such as applications.) If you see an outlined table cell in the **Contact Centers** pane, then drill down to the application or contact group level to find the actual violation.
2. A solid-colored table cell indicates that the object associated with the violation is the object that violated the threshold settings and triggered the violation. For example, a specific application or contact group might have caused a warning violation.

Zero Suppression

There might be times when you do not see an object on your dashboard that you had viewed previously. This could be due to a change in your security permissions, or it might be because the dashboard is configured to hide objects for which there is currently no activity.

An administrator can configure Contact Center Advisor and Workforce Advisor to use a feature called *zero suppression*. When the zero suppression feature is in effect, objects for which there is no activity do not display on the dashboards. This keeps dashboards clear of unnecessary data.

The following objects can be zero-suppressed:

- applications (CCAdv)
- application groups (CCAdv and WA)
- agent groups (CCAdv and WA)
- regions (CCAdv and WA)

Contact groups cannot be zero suppressed.

For more information about the rules that govern zero suppression of specific objects, see Zero Suppression in the *Genesys Contact Center Advisor and Workforce Advisor Administrator User's*

Guide.

Working with Contact Center Advisor

In addition to what is described in the Viewing Contact Center Data topic, there are other ways to view data that are specific to Contact Center Advisor (CCAdv).

Selecting the Organizational Hierarchy

You can view information in the **Contact Centers** pane in the following ways:

- By reporting region, then by contact center, then by application group
- By reporting region, then by application group, then by contact center
- By geographic region, then by contact center, then by application group
- By geographic region, then by application group, then by contact center
- By operating unit, then by contact center, then by application group
- By operating unit, then by application group, then by contact center

> **Tip**
> Each data grouping in the CCAdv **Contact Centers** pane presents different values because of the way in which the rollups are calculated.

Selecting the Time Profile Groups for the Accumulation of Data

To display metric values in your dashboard by time profile group, click the buttons above the **Contact Centers** pane that are captioned **Short**, **Medium**, and **Long**. The dashboard then displays a subset, limited by time profile group, of the metrics that are selected in the column chooser.

The calculations of metric values for a time profile group use the most recent values possible from the external source systems. The values for the Short time profile group are refreshed as often as Contact Center Advisor can read the values from the external systems from which it takes raw data. The values for the Medium and Long time profile groups are refreshed according to a schedule configured by an administrator.

- **Time profile groups**—Short, Medium, or Long. An administrator can assign both historical and point-in-time custom metrics to these groups.
- **Time profile duration**—Point-in-time or Historical. *Point-in-time* metrics always have a time interval of zero. *Historical metrics* have a non-zero duration. The administrator can configure the time interval for custom historical metrics. Point-in-time metrics that are installed with Advisors are displayed when you have selected the **Short** time profile group. Custom point-in-time metrics can be displayed when you

have selected any time profile group.

- **Time profile duration type**—Sliding or Growing. For example, if the time profile duration is `30 minutes growing`, the intervals start at the most recent even half hour (for example, 09:00 or 10:30) and the values accumulate to the instant in time when the calculation is carried out.

Special Metric Values

When a metric calculation's denominator is zero or the data is not available, the dashboard displays N/A.

If a metric value cannot ever be supplied by the external data source, the dashboard displays a dash (-) in its place.

Summaries of Metric Values in the Contact Centers Pane

- Counts—Counts (such as the number of calls offered, number of calls abandoned, and calls in queue) are summed. The calculations de-duplicate applications, agent groups, and agents, so that each of these objects contributes its data to a rolled-up calculated value only once.
- Values—Values (such as the longest time in queue) take the minimum or maximum that is appropriate for that metric.
- Calculated values—Calculated values are calculated at the aggregate by first summing the components of the calculation, then performing the calculation. Examples of calculated value metrics include service-level percentage, abandoned percentage, and average handle time. The calculations de-duplicate applications, agent groups, and agents, so that each of these objects contributes its data to a rolled-up calculated value only once.

Displaying Applications and Agent Groups

To display the applications and agent groups related to a contact center:

- On the **Contact Centers** pane, select a contact center.
  The applications associated with the contact center appear in the **Applications** pane. If the contact center is at level three in a grouping, then the applications are also filtered by the application group at level two.

  In Contact Center Advisor, the applications are not filtered by the object at level one. This means that you might see applications that are not related to the object at level one, as long as they are related to the contact center you selected.

  Agent groups related to the applications appear in the **Agent Groups** pane.

To display the applications and agent groups related to an application group:

- On the **Contact Centers** pane, select an application group displayed at level three in a grouping.
  The applications associated with the contact center appear in the **Applications** pane. The applications are also filtered by the contact center at level two in the grouping.

  In Contact Center Advisor, the applications are not filtered by the object at level one. This means that you might see applications that are not related to the object at level one, as long as they are related to the application group you selected and to the contact center at level two above it.

  Agent groups related to the applications appear in the **Agent Groups** pane.

Time Profile Values on the Agent Groups Pane

For historical agent group metrics, the **Agent Groups** pane displays values for only one time profile. An administrator chooses which time profile all users see for historical metrics on the **Agent Groups** pane.

If you select a time profile group button above the **Contact Centers** pane and it is the same as the administrator's choice for the historical metrics, then the **Agent Groups** pane displays the metrics and their values for that time profile. That is, from the full list of agent group metrics that are selected in the Column Chooser, the **Agent Groups** pane displays the subset of metrics (and their values) that are assigned to the selected time profile group.

If you deselect the time profile that the administrator chose, then the pane shows no historical metrics.

The pane displays metric values for point-in-time metrics (that is, values that do not describe a duration in time) if you select the time profile group button to which point-in-time metrics are assigned.

Dashboard Timestamp

The dashboard toolbar includes a **Last Updated** timestamp. The timestamp has been assigned by the CCAdv server to the metrics currently displayed in the dashboard. The timestamp indicates the age of the snapshot of real-time metrics supplied to the CCAdv server by external data sources, and used by the server to calculate the displayed metrics.

Working with Workforce Advisor

This page describes ways to view data in Workforce Advisor (WA) in addition to what is described in the Viewing Contact Center Data topic.

Selecting the Organizational Hierarchy

You can group information in the WA **Contact Centers** pane in the following ways:

- By reporting region, then by contact center, then by application group
- By reporting region, then by application group, then by contact center
- By geographic region, then by contact center, then by application group
- By geographic region, then by application group, then by contact center
- By operating unit, then by contact center, then by application group
- By operating unit, then by application group, then by contact center
- By reporting region, then by network contact centers (CCs)
- By geographic region, then by network contact centers (CCs)
- By operating unit, then by network contact centers (CCs)
- By application groups, then by network contact centers (CCs)

Each grouping presents different values because of the way in which the rollups are calculated.

Values on the Contact Centers Pane

Values are calculated on the cumulative average or sum for the current interval since the most recent even half-hour interval (for example, 09:00, 15:30, 22:00). This interval is from 0 to 30 minutes long. **Point-in-time** metrics also appear on the display.

Special Metric Values

When a metric calculation's denominator is zero or the data is not available, the dashboard displays N/A.

If a metric value cannot ever be supplied by the external data source, the dashboard displays a dash (-) in its place.

Contact Groups Included in the Rollups

The metric values on each level in the Contact Centers pane are calculated from the lower level values—contact groups or agent groups' real-time data, and grouped by the elements related to the given rollup level.

Some forecast values for contact groups are already supplied as percentages or averages calculated for a 30-minute interval. Forecast values in aggregations in the Contact Centers pane are then calculated as weighted values using another raw metric or its simple aggregation as a weight.

Summaries for Metric Values

Summaries for metric values are one of two types:

- Simple aggregations—`SUM, MAX, MIN, COUNT` of the lowest level raw values, grouped by the elements related to the rollup level.

  For example, the number of actual calls offered (`Act NCO`) on the Application Group level of the **Geographic Region–Contact Center–Application Group** view is the aggregation of calls offered (`SUM(Calls Offered)`) taken from all applications associated with the contact groups that are included in the rollup, grouped by geographic region, contact center, and application group and belonging to the given geographic region, contact center, and application group.

  The number of calls offered on the Enterprise level is calculated as (`SUM(Calls Offered)`) taken from all contact groups included in rollup contact groups.

- Calculated values—Values calculated using formulae based on simple aggregations of the values from elements with properties that match the given rollup level. For example, average handle time is the aggregation of handled time divided by the aggregation of calls handled. The average handle time (`AHT`) on the Application Group level of the **Geographic Region–Contact Center–Application Group** view is Handle Time/Calls Handled taken from the set of applications associated to contact groups that are included in the rollup which belong to the given geographic region, contact center and application group.

Displaying Contact Groups and Agent Groups

You can change the way in which the Contact Groups and Agent Groups are displayed in the following ways:

- Associated With a Contact Center
- Associated With an Application Group
- Associated With an Agent-Group Contact Center

Associated With a Contact Center

To display the contact groups and agent groups associated with a contact center, in the **Contact Centers** pane, select the contact center at level two or three.

The **Contact Groups** pane will display the contact groups associated with both the contact center and the object at level one. Associated agent groups appear in the **Agent Groups** pane.

If the selected contact center is at level three in a grouping, then the base objects are also filtered by the application group at level two.

Associated with an Application Group

To display the contact groups and agent groups associated with an application group, in the **Contact Centers** pane, select the application group at level two or three.

The **Contact Groups** pane will display the contact groups associated with both the application group and the object at level one. Associated agent groups appear in the **Agent Groups** pane.

If the selected application group is at level three in a grouping, then the base objects are also filtered by the contact center at level two.

Associated with an Agent-Group Contact Center

Agent-group contact centers appear only when you choose one of the final four groupings to show in the the Contact Centers pane.

The agent-group contact centers appear at level three in those groupings. Their related network contact centers appear at level two. The first level, a region or application group, is the filter that also applies to the related base objects in the other two panes.

In these final four groupings, when you select a network contact center at level two, the other panes show all the base objects related to it and to the object at level one. But when you select an agent-group contact center at level three, the other panes show only the base objects associated with the agent-group contact center.

Dashboard Timestamp

The dashboard toolbar includes a Last Updated timestamp. The timestamp on the Workforce Advisor dashboard is the timestamp that the Contact Center Advisor server assigned to the snapshot of real-time metrics that it read from external data sources, and which the Workforce Advisor server used to calculate the metrics displayed on the dashboard.

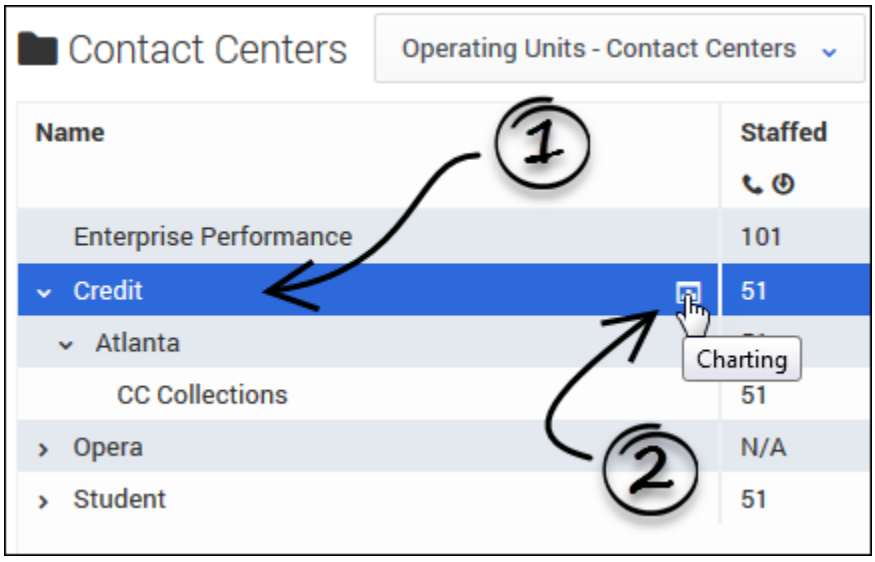
Metric Graphing

You can launch the **Metric Graphing** window from the dashboard in both Contact Center Advisor (CCAdv) and Workforce Advisor (WA). Use the **Metric Graphing** window to monitor graphs for trends and to determine the effectiveness of actions taken to resolve specific situations.

Metrics must first be enabled for graphing in the Administration module. Only metrics and business objects to which you have access are displayed on the dashboard (see Role-Based Access and Permissions). An administrator configures settings that determine which combinations of metrics and time profile values can be stored and then graphed.

> **Important**
>
> If you set values for more than one time profile group for a metric, each counts as a separate metric for graphing. For example, if you set AHT to 10 minutes for the **Short** time profile group and AHT to 90 minutes for the **Long** time profile group, they appear as two metrics on the graph.

Launching the Metric Graphing window



To launch the **Metric Graphing** window:

1. Select a row in one of the following panes:
   - **Contact Centers** pane (CCAdv or WA)
   - **Applications** pane (CCAdv)

- **Contact Groups** pane (WA)

  The charting button displays in the selected row if an administrator has enabled metrics for that object and granted you permission to view the metrics associated with the object.

2. If you see the charting button () in the selected row, click it to launch the **Metric Graphing** window.

> **Important**
> This feature is not available for agent groups.

See also:

- Metric Graphing Window Overview
- Reading the Graph
- Graphing Metrics and Time Profiles
- Using the Time Range Slider to Select Data to Display in the Metric Graphing Window

Metric Graphing Window Overview

Metrics graphing data is calculated and saved to an Advisors metric graphing database. When you open a **Metric Graphing** window, it can immediately retrieve historical data for a configured interval from the server, as well as "future" data for forecast metrics if you open the window in Workforce Advisor and forecast data is available.

In the Contact Center Advisor/Workforce Advisor **Metric Graphing** window, the list of metrics that are available to graph is dependent on the pane from which you launch the window. The following Table describes the differences:

On this dashboard:	In this pane:	You can graph:
Contact Center Advisor	Contact Centers	Application and Contact Group metrics
Contact Center Advisor	Applications	Application metrics only
Workforce Advisor	Contact Centers	Contact Group and Application metrics
Workforce Advisor	Contact Groups	Contact group metrics only

Information about the location (or context) from which you launched the **Metric Graphing** window displays as a "breadcrumb trail" at the top of the window.

An administrator can configure Advisors to store historical and point-in-time metric values for graphing combinations of metrics and time profiles. For example, you might want to compare `TotalCallsAbandoned (5m Sliding)` to `TotalCallsAbandoned (30m Growing)` on a graph. When launched, each graph displays the metric values for a time range, which is configurable. For related information, see Using the Time Range Slider to Select Data to Display in the Metric Graphing Window.

The metric values display to the same precision used for display of that metric in the dashboard. For example, if values over 100 display as `100+` on the dashboard, then values over 100 in the **Metric Graphing** window also display as `100+`.

If the graph is closed and re-opened, the display begins with the period of data as configured by the administrator.

Graph Attributes Saved in User Preferences

Many of the **Metric Graphing** window settings are stored for the Advisors application in which you opened the graphing window. For example, the following user-defined settings are automatically saved:

- The row in the dashboard from which the graph was launched (that is, the "breadcrumb" that displays at the top of the **Metric Graphing** window)
- Your selection of graphed metrics

- Your selection of graph style for each metric
- Your selection of graph color for each metric
- The metric display order that you selected
- The selected time filter, if any
- The **Time Range Slider** size and position

If you close and later re-open the **Metric Graphing** window from the same location in the dashboard (pane and row), the window will display your previously-selected graph and related options.

If you have at least one **Metric Graphing** window open in either Contact Center Advisor or Workforce Advisor, and you navigate to another Advisors module within the open browser tab (effectively "closing" the module that you were viewing), then the application (CCAdv or WA) saves the open graphs. The same is true if you log out of the Advisors applications and log in again. Any **Metric Graphing** windows that were open when you logged out will be re-opened when you log in again. However, if configuration or permissions change while a graphing window is closed, some metrics or objects might not be available after you log out and then log in again.

Reading the Graph

The horizontal axis of the graph represents time. The graph has two vertical axes, one on the left side of the graph and one on the right. The vertical axes represent the metric values. The graph displays metric values on the two vertical axes as follows:

- The first metric you select in the **Metrics** list is represented on the left vertical axis.
- Subsequent metrics you select in the **Metrics** list continue to be represented on the left vertical axis as long as the selected metrics have the same minimum and maximum values as the first selected metric.
- The first metric that you select that has different minimum and maximum values than the previously-selected metric or metrics is represented on the right vertical axis.
- After there are selected metrics represented on both vertical axes, all subsequent metric selections act as follows:
  - If a selected metric's minimum and maximum values are the same as metrics represented on the left vertical axis, then that metric is also represented on the left axis.
  - If a selected metric's minimum and maximum values are the same as metrics represented on the right vertical axis, then that metric is also represented on the right axis.
  - Once you have selected metrics that establish a minimum and maximum value range for both the left and right vertical axes, any metric in the **Metrics** list that is not yet selected, and that has minimum and maximum values different from metrics already represented on the vertical axes, is disabled.

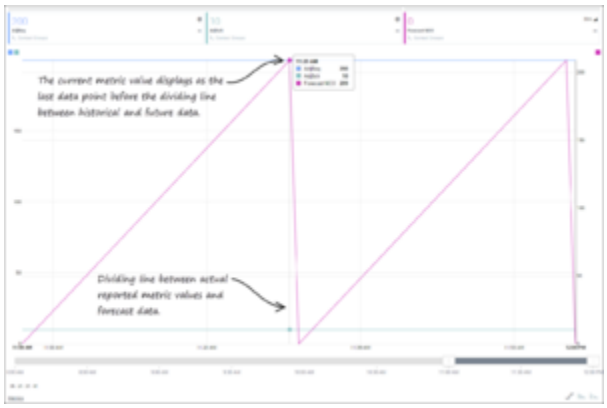
A color legend over the vertical axes indicates which metrics are represented on each axis.

Finding Data Points in the Graph

Move your cursor into the graphing area to display the "metric needle". As you move your cursor over the graph, the needle moves also. Use the needle to find values for each graphed metric at specific points in time.

Graphing Forecast Metrics in Workforce Advisor

If you work with forecast metrics in your Workforce Advisor dashboard, and an administrator has made forecast metrics available for graphing, then you can graph forecast metrics in the Workforce Advisor **Metric Graphing** window in the same way that you graph any other metric. When graphing forecast metrics, the word **Now** displays above the dividing line between actual reported (historical) metric data and forecast (future) data. When you see the word **Now**, any data points that display to the right of that line are forecast data points. Any data points to the left of the line represent actual reported data. The current metric value displays as the last data point before the dividing line between historical and future data.



Graphing Metrics and Time Profiles

There are options within the **Metric Graphing** window that help you to analyze the data from a selection of metrics. You can use the window to get an overall view of the day, or to pinpoint a 15-minute time frame and examine what was happening at that time.

Administrators select which metrics and time profiles are available for you to graph. To graph one or multiple metrics:

1. Select an object on the **Contact Centers** pane, an application on the **Applications** pane, or a contact group on the **Contact Groups** pane. Look for the **Charting** button () beside the name of the object, application, or contact group for which you want to graph metrics; you can graph metrics for an object only if the **Charting** button is displayed for that object.
2. Click the **Charting** button in the selected row. If there are metrics for the selected object, application, or contact group that cannot be graphed, then those metrics will be disabled (grayed out) in the list of available metrics in the **Metric Graphing** window.

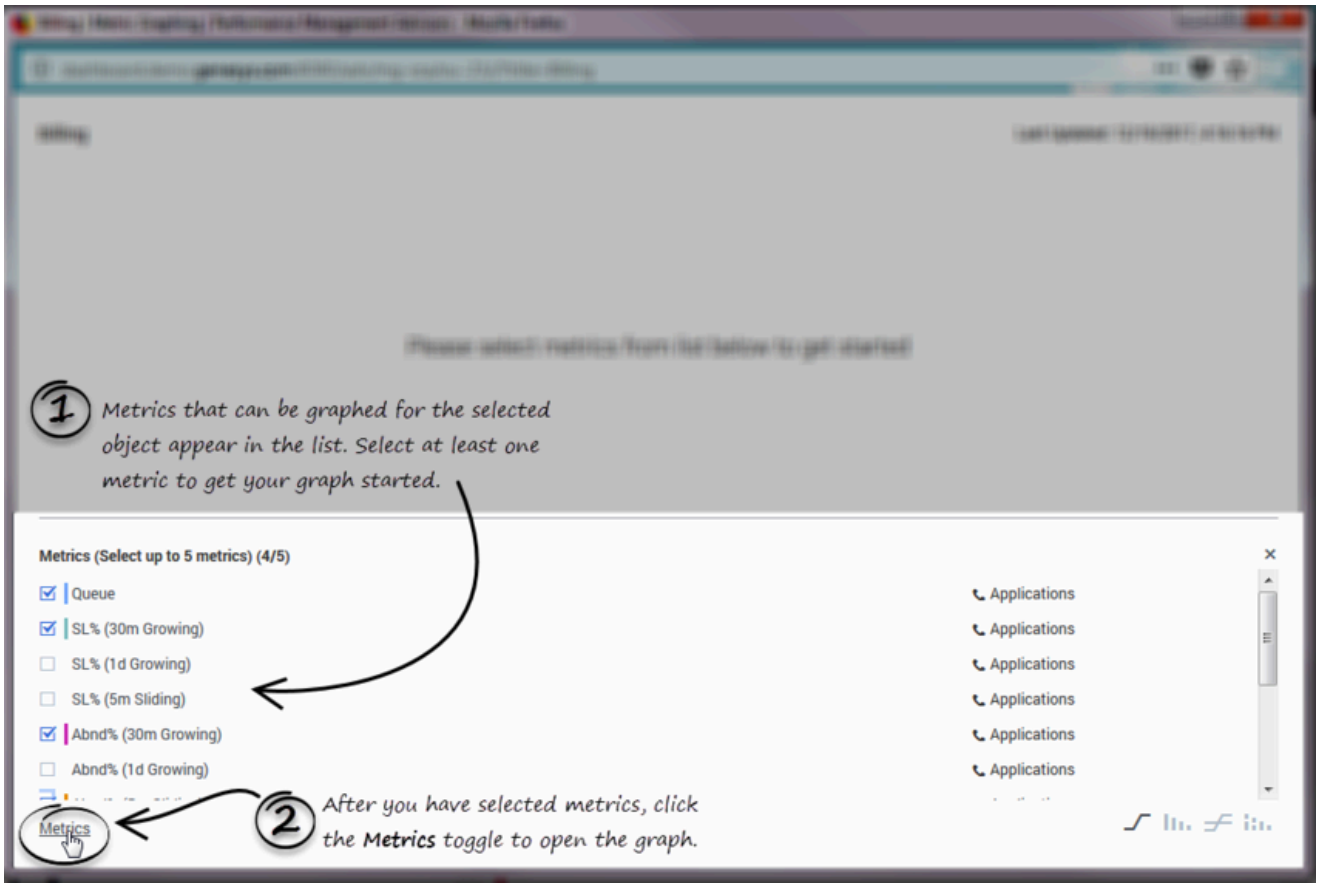
Once you have a **Metric Graphing** window open, you can do the following:

- Set up the Graphing Area
- Change the Metric Selection or Graph Type
- Work with Time Intervals
- Arrange Metrics and Modify Color Selections

The timestamp that displays at the top of the **Metric Graphing** window indicates when the metric data in the graph was last updated.

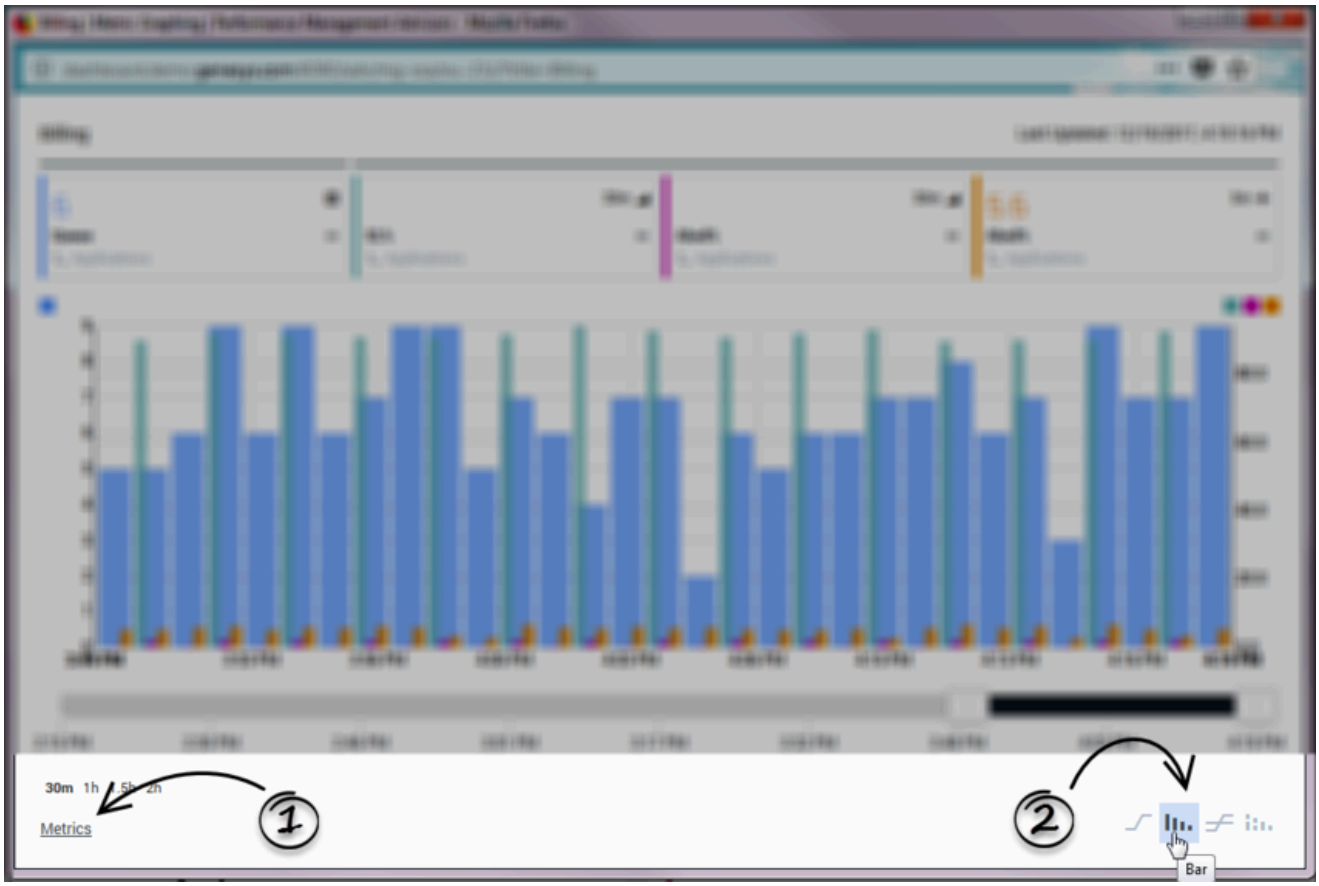
Set up the Graphing Area

When you first open a **Metric Graphing** window for an object, you are prompted to select at least one metric to display on the graph. Once you have at least one metric selected to graph, click the **Metrics** toggle at the bottom of the window to create the graph.



Change the Metric Selection or Graph Type

After you have a graph set up, you can return to the list of available metrics to change your metric selection. You can also easily change the style of the graph.

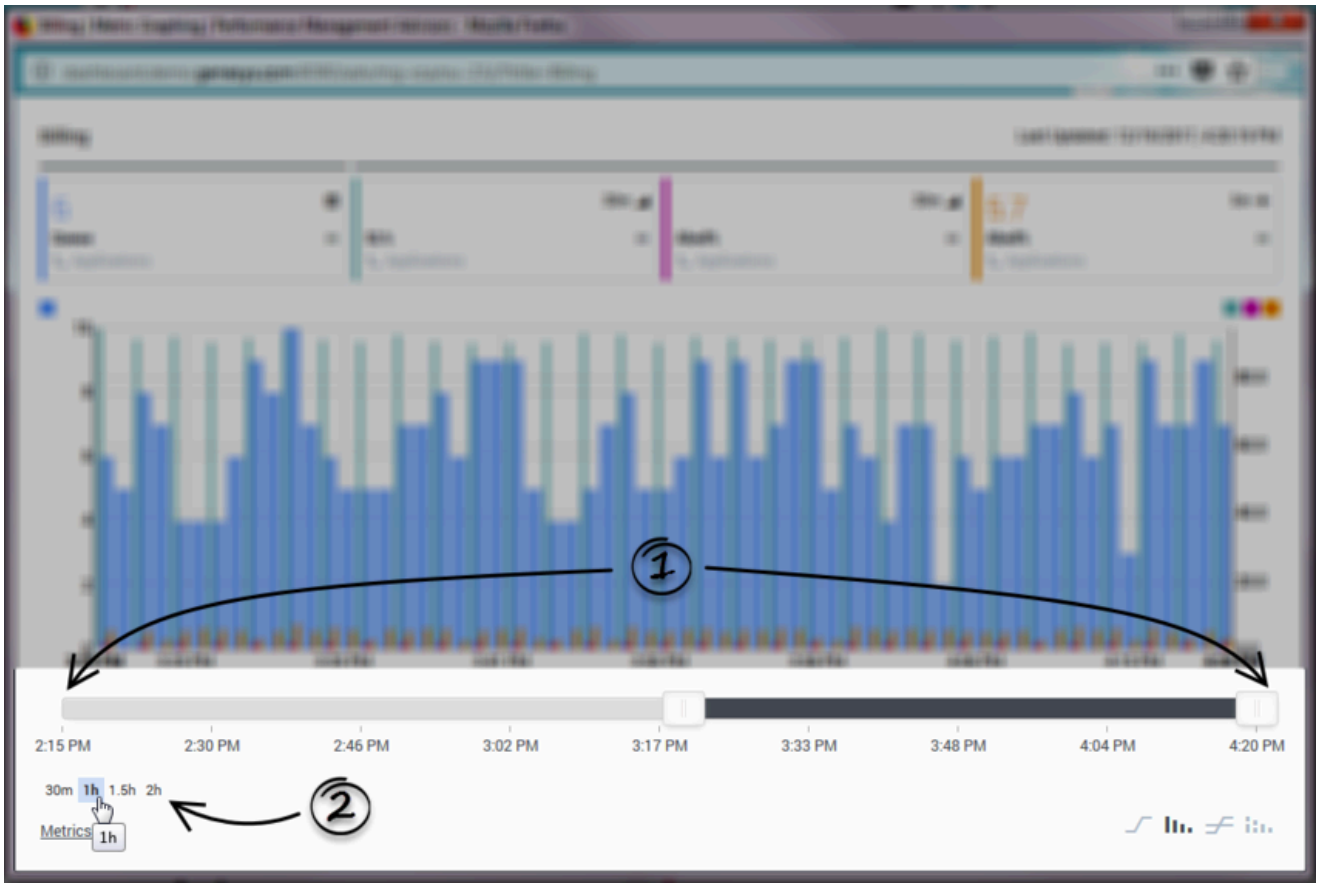


1. Select or deselect metrics for the graph.	Once you have a graph established, you can click the **Metrics** toggle to alternately open and close the list of metrics that are available for graphing. You can select additional metrics for your graph, or deselect metrics to remove them from the graph. Metrics are identified by the display name.
2. Select the style of graph.	Select one of the following graph styles: • Line • Bar • Stacked Bar You can change the graph style at any time while working in the **Metric Graphing** window.

Work with Time Intervals

There are times when you might want to review data for a specific time interval; perhaps even for a five-minute interval. Maybe you want to review a specific five-minute time interval from three hours ago. There are two features in the **Metric Graphing** window that you can use to review metrics data over time, and to specify a range of time to display in the graph. These two features work in conjunction so you can, for example, review data in 30-minute blocks over the course of the entire day. The precision of the time intervals is dependent on how the system administrator has configured

metrics graphing for your enterprise.



1. Adjust the viewing area of the graph, based on time.	Use the **Time Range Slider** to focus the graph on specific time intervals throughout the day, or to adjust the amount of data (a short time interval or a long one) that displays in the graph. You can use the **Time Interval** buttons (2) to more precisely adjust the length of the **Time Range Slider**, as well. For more information, see Select a precise time interval for the graph and Using the Time Range Slider to Select Data to Display in the Metric Graphing Window.
2. Select a precise time interval for the graph.	Use the **Time Interval** buttons to quickly adjust the amount of data to view in the graph. The values that display on the **Time Interval** buttons are dependent on parameters that the administrator configures. For example, if you have a `30m` **Time Interval** button, and you click it, then the application displays a graph of the data that it collected during the previous 30 minutes – the left side of the graph is the historical 30-minute mark, and the right side of the graph is the current moment in time.

Arrange Metrics and Modify Color Selections

1. and **2.** Editing the color and placement of metrics.	A break in the horizontal line at the top of the **Metric Graphing** window (1) indicates there there are metrics aligned to both the left and right vertical axes of the graph. The metrics that are aligned to the left vertical axis display before the line break. The remaining metrics are aligned to the right vertical axis. Click and drag the handle (⋮⋮⋮) in the lower right corner of the tile to change the order in which the metrics display in the graph. If there are metrics aligned to each vertical access, you can re-arrange the order of the metrics for each axis, but you cannot move a metric from one axis to the other. To state it differently, you can re-arrange the order of the metrics that are grouped together under a continuous horizontal line at the top of the graph, but you cannot move a metric past a break in the horizontal line. Click anywhere on a metric tile to open the drop-down menu from which you can edit the graph style of that specific metric, or change the color of the metric, or even hide the metric on the graph (click the blank color square ( )). Selecting a new graph style from the metric tile's drop-down menu changes the graph style for that metric only. To change the style of the graph for all metrics simultaneously, use the buttons at the bottom of the **Metric Graphing** window.
3. Reading metric values from the correct graph axis.	Color swatches over an axis identify the metrics that are aligned to that axis. If you have metrics aligned to both the left and right vertical axis, check the color swatches to ensure you are reading the values for a specific metric from the correct axis.

Graphing Multiple Time Profiles for a Historical Metric

Using the list of available metrics under the **Metrics** toggle, select a historical metric that has multiple time profiles configured. Select that same metric for each of the time profiles. For example, you can choose the following metrics to display in a single graph:

- [ ] AHT Short
- [ ] AHT Medium
- [ ] AHT Long

When choosing multiple time profiles of a metric to graph, keep in mind that each combination of metric plus time profile is counted. In the following example, three metrics are selected for graphing:

- [x] AHT Short
- [x] AHT Medium
- [ ] AHT Long
- [ ] ASA Short
- [ ] ASA Medium
- [x] ASA Long

Saved and Discarded Graphing Data

Metrics graphing data is calculated and saved to the Metric Graphing database. When the **Graphing** window is opened, it can immediately retrieve from the server historical data for a configured interval, plus the same amount of future data for forecast metrics.

Persistent Graphing Data

Graphs that you created, or are in the process of creating, persist if you intentionally or accidentally log out. When you log in again, these same graphs, including the metrics you selected for graphing, are retained until you deselect the metrics or close the graphing window.

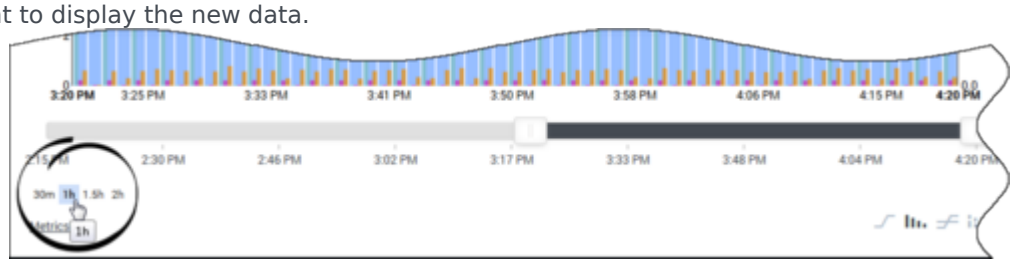
See also, Graphs Saved in User Preferences.

Using the Time Range Slider to Select Data to Display in the Metric Graphing Window

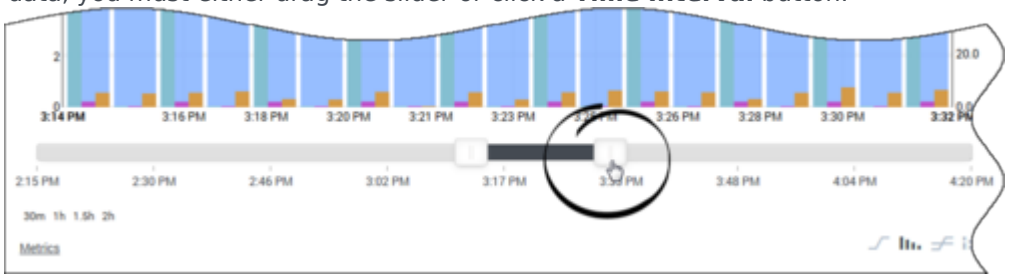
The **Time Range Slider** bar at the bottom of the **Metric Graphing** window represents the total set of data available. You can select part of that total data set for display in the main graph.

Use the following controls to change the width of the **Time Range Slider**:

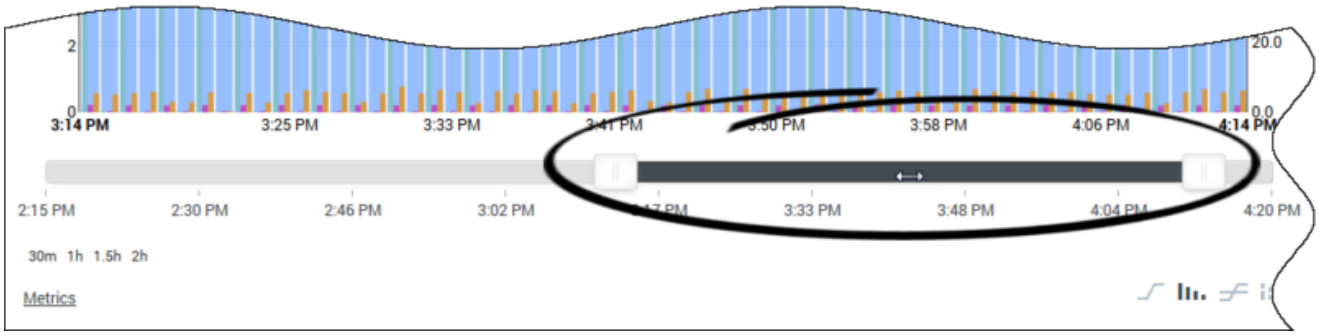
- Click one of the **Time Interval** button. After you click a **Time Interval** button, the **Time Range Slider** "sticks" to the right edge of the time range. As new data arrives, the slider continues to move to the right to display the new data.



- Drag the handle on the left or right side of the **Time Range Slider**. After you adjust the **Time Range Slider** in this way, the slider stays in its present location along the graph unless you move it or otherwise adjust it. When new data arrives, the slider does not move to display the new data. To see new data, you must either drag the slider or click a **Time Interval** button.



If you drag a handle on one end of the **Time Range Slider** to change the length of the time interval that you are viewing in the graph, you can then place your cursor within the highlighted area of the slider and, with the left mouse button held down, drag the slider back and forth in time within the graph. The following figure demonstrates this action.



The time profiles determine the duration for which Advisors displays metric data in the graph. For example, if the administrator configures Advisors to maintain metric data for two hours, then the total possible time duration for which Advisors displays metric data when you launch the **Metric Graphing** window is two hours. If you open the **Metric Graphing** window from the **Contact Groups** pane, it also includes forecast (future) time.

Working with the Alerts Pane

You can view alerts, and summary information about each alert, in the **Alerts** pane.

Threshold violation alerts are business alerts that occur when violations, based on metric threshold rules, persist for a configured amount of time. In other words, a metric value that violates a threshold must remain above or below the threshold for a set amount of time (for example, 15 minutes) before the violation creates an alert. Threshold violation alerts display in both Contact Center Advisor (CCAdv) and Workforce Advisor (WA).

Manual alerts are created by an administrator and can be either business alerts or technical alerts. Manual alerts display in both CCAdv and WA.

Unlike metric threshold violation alerts, the manual alerts display immediately.

Alerts Pane

In the **Alerts** pane, views and functionality are common to both CCAdv and WA.

The **Alerts** pane organizes alerts information in a standard format, and has filter and search mechanisms to help you to find the information you need about alerts quickly. It lists alerts of all kinds.

- On the CCAdv dashboard, the **Alerts** pane displays threshold violation alerts for application metrics and manual alerts.
- On the WA dashboard, the **Alerts** pane displays threshold violation alerts for contact groups and manual alerts. See also Alerts Pane Attributes.

To navigate the **Alerts** pane views and change the display of data, see the following topics:

- Viewing Alerts
- Searching and Filtering Alerts

> **Important**
>
> The same thresholds are applied to the values of a metric no matter its time profile. However, the alerts in the **Alerts** pane are created only by violations on values of the metric in the **Short** time profile group, not the **Medium** or **Long** time profile group.

Alerts Pane Attributes

The attributes listed in the table below are applicable to both the CCAdv and WA **Alerts** panes.

	Metric Threshold Violation Alerts	Manual Alerts
Name	The display name of the metric whose threshold violation has caused the alert.	The message configured for the alert. The message is configured in the **Manual Alerts** page in the Administration module.
Context	The scope of the metric; that is, geographic region, application group and contact center. The display format is: `Geographic Region > Application Group > Contact Center Base Object Name`	The name of a contact center associated with the manual alert. Because a manual alert can be associated with multiple contact centers, there are multiple entries in the **Alerts** window for a given manual alert, with one entry for each contact center.
Alert Severity	Displays a symbol to indicate Warning () or Critical ()	Displays a symbol to indicate Warning () or Critical (), depending on the setting that an administrator assigned in the administration module.
Metric Value	The metric's value. Displayed in a red field if the alert has Critical severity, otherwise displayed in a yellow field.	
Last Updated Metric Deviation	Displays the following three types of data in the format:  • **Value pointer**—An up arrow or down arrow, depending on whether the value has increased or decreased since the last reading. • **Difference value**—Equals the current value minus the last read value (that is, `dv = cv - lrv`). • **Difference percentage**—Equals the result of the current value, minus the last read value, divided by the last read value (that is, `dp = [cv - lrv] / lrv`).	

	Metric Threshold Violation Alerts	Manual Alerts
	The text is colored according to severity: red [Critical], or yellow [Warning].	
Threshold	The violation and warning thresholds. Thresholds with only an upper or lower limit will have one of the following structures (the order in which the words "Warning" and "Critical" are listed identifies the threshold values as upper limits or lower limits): Upper level: Critical 3 Warning 2 Lower level: Warning 1 Critical 0 Thresholds with both an upper and lower limit will have the following structure: Critical 3 Warning 2 Warning 1 Critical 0	
Dates and Times	The **Started** and **Duration** of the alert.	The start time (the **Effective Date**) and end time (the **Expiration Date**) for a manual alert.
Sparkline	A graph appears in the expanded cell, showing the metric and alert activity from the time the sparkline is open. At each bar (time interval) a tooltip displays the date, time, and metric value. The columns are colored at each time interval, according to the severity of the alert.	

Viewing Alerts

The **Alerts** pane lists all active alerts, displaying each alert on an individual row.

Cycling Through Alerts

You can cycle through the alerts automatically or manually. CCAdv cycles through the alerts automatically if you select the **Cycle** checkbox. Otherwise, you can cycle through the alerts manually.

- In *cycle* mode, alerts are shown for each contact center in a carousel-like manner.
- If the cycle mode is not selected, you control the list of alerts that display.

Clear the **Cycle** check box to disable the automatic scrolling actions. When you turn off the cycle mode, the **Alerts** pane displays a complete list of alerts.

When the cycle mode is disabled, you can scroll through all of the alerts manually, or use the filters at the top of the **Alerts** pane to find specific alerts; see Searching and Filtering Alerts.

Expanding and Collapsing Alerts

You can view alerts in collapsed or expanded mode. In expanded mode, the sparkline displays for metric threshold violation alerts (see Alerts Pane Attributes for more information about the sparkline). By default, alerts are displayed in collapsed mode.

In collapsed mode, you can view basic alert information, such as:

- The name or message associated with the alert.
- The metric value and alert severity indicator.
- The alert's date and time information.

See Alerts Pane Attributes for more information about the symbols and color-coding used in the **Alerts** pane.

In expanded mode, you can view the basic alert information, as well as a sparkline graph at the bottom of each metric threshold violation alert cell, with warning- and critical-colored bar graph indicators. The y-axis represents the metric value and the x-axis represents time.

To expand the display of an individual alert, in the cell that contains the alert for which you want to view the sparkline, click the drop-down arrow beside the **Started**/**Duration** information. To return to collapsed mode, click the arrow again.

To expand or collapse all alerts in the **Alerts** pane simultaneously, click the **Expand All**/**Collapse All** link that displays above the **Alerts** pane. The link toggles between an expanded and collapsed view

of the alerts.

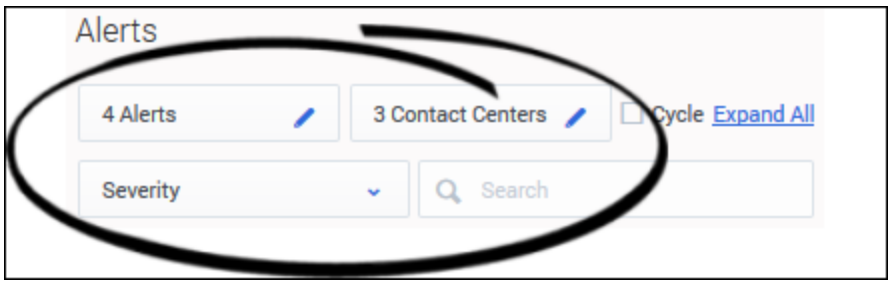
For detailed descriptions of the alert attributes listed above, see Alerts Pane Attributes.

Resizing the Alerts Pane

The **Alerts** pane is resizable horizontally. You can manually resize the width of the **Alerts** pane on your dashboard. Move your cursor over the space between the **Alerts** pane and the other panes on your dashboard until you see the split bar symbol (), and then click and drag.

To quickly collapse or expand the **Alerts** pane, use the collapse/expand arrows ( and ▲ ▼) that are available between the panes.

Searching and Filtering Alerts



There are filters at the top of the **Alerts** pane, which you can use to refine the list of alerts. You can also specify the order in which to display the list of alerts. For example, you might choose to see only the critical alerts associated with a specific Contact Center listed in the order in which they began (that is, oldest first).

In the **Contact Center** view, alerts are filtered and displayed according to the contact center that is selected, with each alert and its details in a separate cell.

Typing in the **Search** field enables you to filter alerts by text attributes. For example, filter the list of alerts to those specific to a metric, region, application group, contact center, application, or contact group. Only the alerts matching the search criterion are displayed. When you clear the search field of text, the complete list of alerts is restored.

Working with Column Chooser

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

Only metrics to which you have access are displayed in the **Column Chooser** window (see Role-Based Access and Permissions).

Selecting Time Profile Groups

The **Column Chooser** shows the metrics to which you have access, from all time profile groups. It enables you to select metrics from different time profile groups.

For example, the **Available Metrics** pane shows three entries for AHT (average handle time) for applications, one for each time profile group (Short, Medium, and Long). You can then choose to display one, two, or all three on the dashboard.

Default Columns

When the Column Chooser is launched for the first time, the set of displayed columns has not been configured in a previous session. The list of metrics on the **Selected Metrics** pane, and shown by default on the dashboard, corresponds to the default set of selected metrics configured in the Administration module.

Default Metrics Sort Order

The default sort order of metrics is set by the administrator.

Selecting Metrics for Dashboard Display

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

list.

Any metric in the **Available Metrics** pane is available for display, but is not currently displayed on the dashboard if there is no check mark beside the metric row. To add an available metric to your dashboard display, place a check mark beside the metric in the **Available Metrics** pane. When you click **Apply**, that metric will be displayed in the **Selected Metrics** list and will be added to your dashboard display.

To help you narrow your search for a specific metric in the **Available Metrics** pane, use the filters at the top of the pane. For example, you can search for metrics by channel, object type, and/or time profile group. To find a list of metrics that start with a specific letter, you can click that letter in the alphabet row, assuming the letter by which you want to filter the list is an active link (that is, there are metrics that begin with that letter in the **Available Metrics** pane). You can also enter some or all of a metric name, or a word in a description, into the **Search** field. This limits the display of metrics in the **Available Metrics** pane to the metric or metrics whose names or description contain your search criterion.

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

For related information, see Working with Metrics Libraries.

Working with Metrics Libraries

A *metrics library* is a shortcut method for selecting the list of metrics to display on your dashboard. You have access to metrics libraries only if you have access to Column Chooser because you create metrics libraries in the **Column Chooser** window. In addition, only metrics to which you have access are displayed in the **Column Chooser** (see Role-Based Access and Permissions).

A metrics library enables you to:

- Create reusable lists of metrics to display on the dashboard. For example, you could create a set of metrics that might be required for a specific management task, such as a set of non-voice metrics.
- Maintain those lists.

Creating a New Library

You can create a metrics library only in the **Column Chooser** window. As you create libraries, they are added to the **Select** drop-down list of libraries in the **Column Chooser** window. They are also added to a drop-down list that displays in the dashboard toolbar, beside the button that launches the **Column Chooser** window.

When you select a library from the **Select** drop-down list in the **Column Chooser** window, the description of that library is displayed next to the drop-down list, and the **Selected Metrics** pane is cleared and populated with the list of metrics that make up the library.

To create a new metrics library:

1. Open the **Column Chooser** window.
2. Choose an existing library from the **Select** drop-down list. For example, if you have not yet created any metrics libraries, you might select **From dashboard** to get started. If you previously created a metrics library, and you want to use that library as the basis for a new library, then select that library.
3. Click **Save as New Library**, or, if you have selected a library that you previously created and you want to copy it as the basis for a new library, then click the clone () button.
4. Enter a name for the library. The library name cannot be changed after the library is saved, so be sure to carefully consider what you will enter for the library name.
5. Enter a description (optional). If you create multiple libraries, the description can help you to remember the specific purpose of the library. The **Description** field is editable, so you can always change it later if you decide it could be improved.
6. Add your personal selection of metrics to the **Selected Metrics** pane. See Selecting Metrics for Dashboard Display for information about working with the **Available Metrics** and **Selected Metrics** panes in the **Column Chooser** window.
7. Click one of the following:
   - **Save & Apply** to both save the library and display it on the dashboard immediately.

- **Cancel** to discard the library without saving it. Clicking **Cancel** also closes the **Column Chooser** window and returns you to the dashboard.

Selecting a Metrics Library for Dashboard Display

Once you have created personal metrics libraries, you can quickly change the set of metrics that displays on your dashboard by selecting a specific library. You can select a metrics library from the list of available libraries in the drop-down menu in the dashboard toolbar (beside the **Column Chooser** button), or in the **Select** drop-down menu at the top of the **Column Chooser** window.

Using the Column Chooser Window

If you have not created any new libraries, then you will see only the two default libraries in the **Select** drop-down list in the **Column Chooser** window:

- `System Default`: The default list of metrics to display on the dashboard. An administrator configures this list of metrics. A system administrator might assign permissions to your role in order to limit the number and type of metrics that you can view; therefore, you might see only a subset of the full list of default metrics.
- `From Dashboard`: Retrieves the metrics exactly as displayed on the dashboard, which you can save as a new library.

To display a library's metrics in the dashboard, select the library in the **Select** drop-down menu in the **Column Chooser** window, and then click the **Apply** button.

Using the Metrics Library Menu on the Dashboard

You can select the `System Default` set of metrics from the the **Metrics Library** drop-down menu in your dashboard toolbar, as well as any personal metrics libraries that you have created. Select a library from the drop-down menu to display that library's metrics in your dashboard.

Sometimes, you might see `Unsaved Library` displayed in the dashboard's **Metrics Library** drop-down menu. This means that you have a set of metrics displayed on your dashboard that is a unique group of metrics, and which is not saved as a reusable library. If you want to save the set of metrics as a library, then you must launch **Column Chooser** and save the library there (see Creating a New Library for instructions). If you do not save the `Unsaved Library`, and you select a different metrics library using the toolbar's drop-down menu, and confirm that you want to open the selected library (the application prompts you to confirm or deny the action), then the `Unsaved Library` is discarded. If you discard an unsaved library, and you later want that same set of metrics to display on your dashboard again, you must rebuild the list in **Column Chooser**.

Editing a Library

You might decide that one of your metrics libraries is missing a key metric, or it might have a few more metrics than you need. You cannot change the name of a metrics library after it has been saved, but you can add or remove metrics. You can also change the library description. You can edit a

library only in the **Column Chooser** window. You cannot edit the default metrics libraries (`System default` and `From dashboard`), however you can save a default library with a new name, and then edit that.

To edit a saved metrics library:

1. Open the **Column Chooser** window.
2. Choose an existing library from the **Select** drop-down list.
3. Make your changes to the library.
4. Click one of the following:
   - **Save & Apply** to both save your changes to the library and to display it on the dashboard immediately.
   - **Apply** to display the updated library on your dashboard. Be aware that clicking **Apply** does not save your library. If you navigate away from the updated library using the **Metrics Library** drop-down menu on your dashboard, your changes to the library will be lost.
   - **Cancel** to both discard your changes to the library and to exit the **Column Chooser** window.

     If you ever make unwanted changes to a saved library, but you do not want to exit **Column Chooser**, you can also navigate away from the library using the **Select** drop-down list (that is, simply load a different library). This action has the same result as clicking the **Cancel** button without closing the **Column Chooser** window.

Deleting a Library

You can delete a library only in the **Column Chooser** window. You cannot delete the **System Default** or **From Dashboard** libraries, but you can delete a metrics library that you created.

To delete a metrics library:

1. Open the **Column Chooser** window.
2. Select the library in the **Select** drop-down list.
3. Click the trash can () button.

The library is permanently deleted.

CCAdv/WA Mobile View Dashboard

NEW You can check the Pulse Advisors dashboards on your mobile device using a supported browser. This page gives you an overview of the Contact Center Advisor and Workforce Advisor applications for mobile devices.

You can view the full Advisors desktop dashboard on your mobile device, if necessary, but the dashboards are available as an optimized view that is intended specifically for mobile device users. The Contact Center Advisor (CCAdv) and Workforce Advisor (WA) mobile views give you access to the desktop dashboard's **Contact Centers** pane and the **Alerts** pane.The Advisors mobile view is designed to be an express service; it is not intended to be a replacement for the desktop dashboards.

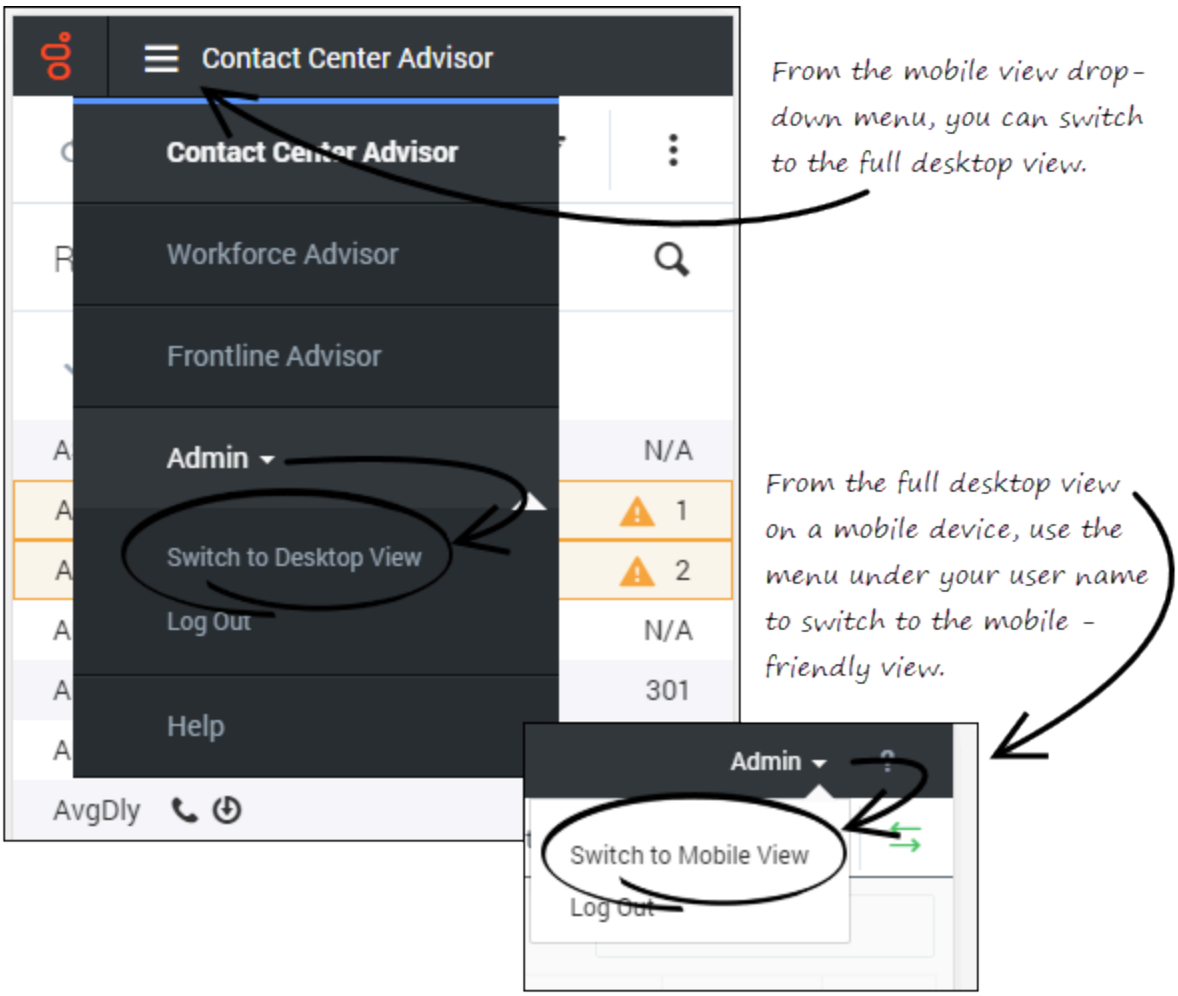
To access the mobile view on your device, open a browser that supports Advisors applications and enter the URL that you use to access your Advisors desktop application. When you initially log in, you see the top level of the mobile view. This is the **Contact Centers** pane from the Advisors desktop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

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

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

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

Device-aware Applications



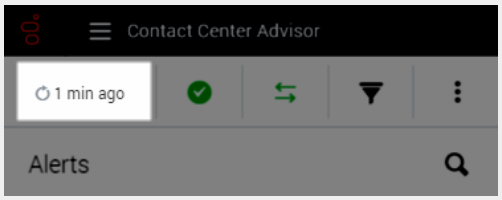
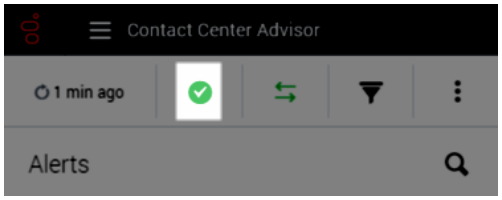
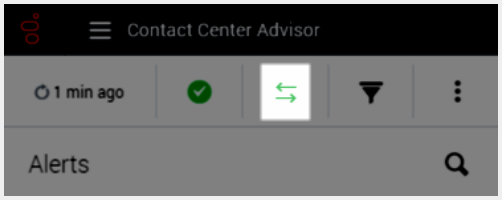
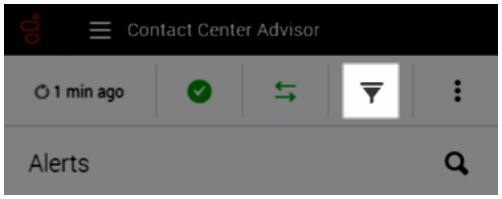
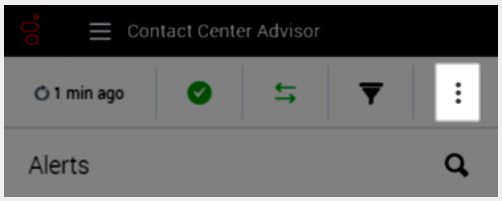
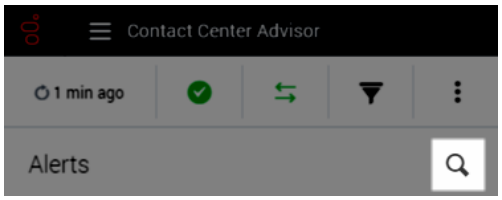
Advisors applications are device-aware. If you log in to an Advisors application on a mobile device, then the mobile view of the application opens. In the drop-down menu at the top of the mobile application, there is an option that lets you switch to the desktop view. When viewing the full CCAdv or WA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

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

Advisors Mobile View Overview

When you initially open the Contact Center Advisor or Workforce Advisor application on a mobile

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

Toolbar option	Description
	**Last Updated timestamp:** Tap the **Last Updated** timestamp to see the precise time at which data was last generated. The CCAdv server has assigned this timestamp to the snapshot of real-time metrics that external data sources have supplied to the server, and which the server used to calculate the metrics displayed in the dashboard.
	**Data Source Status indicator:** Like the desktop dashboards, the data source status indicator displays only in the Contact Center Advisor toolbar, and not in the Workforce Advisor toolbar. The indicator changes from green to red if an external data source has not updated within a configured time frame. Tap the **Data Source Status** indicator in your mobile view to see additional status information.
	**Data Connection Status indicator:** The **Data Connection Status** indicator displays on the toolbar in both Contact Center Advisor and Workforce Advisor. The indicator changes to red when the dashboard cannot connect to the server. Tap the **Data Connection Status** indicator in your mobile view to see additional status information. If the **Data Connection Status** indicator remains red for an extended period of time, report it to your system administrator.
	**Filter:** The **Filter** icon at the top of the view opens a **Filter** pane; the pane is specific to your view. In other words, the pane provides filtering options specific to the contact centers hierarchy if you were viewing the hierarchy when you tapped the **Filter** icon. If you have the **Alerts** pane open and you tap the **Filter** icon, then the filtering options are specific to the **Alerts** pane.
	**More icon:** Tap the **More** icon to open a pane from which you can switch between the **Dashboard** and **Alerts** views.
	**Search:** Tap the **Search** icon to open the **Search** field. When viewing the hierarchy in mobile view, you might always see the **Search** field, instead of the **Search** icon, depending on how your system administrator configures the view for your role in the enterprise.

Changing the Displayed Metrics in Mobile View

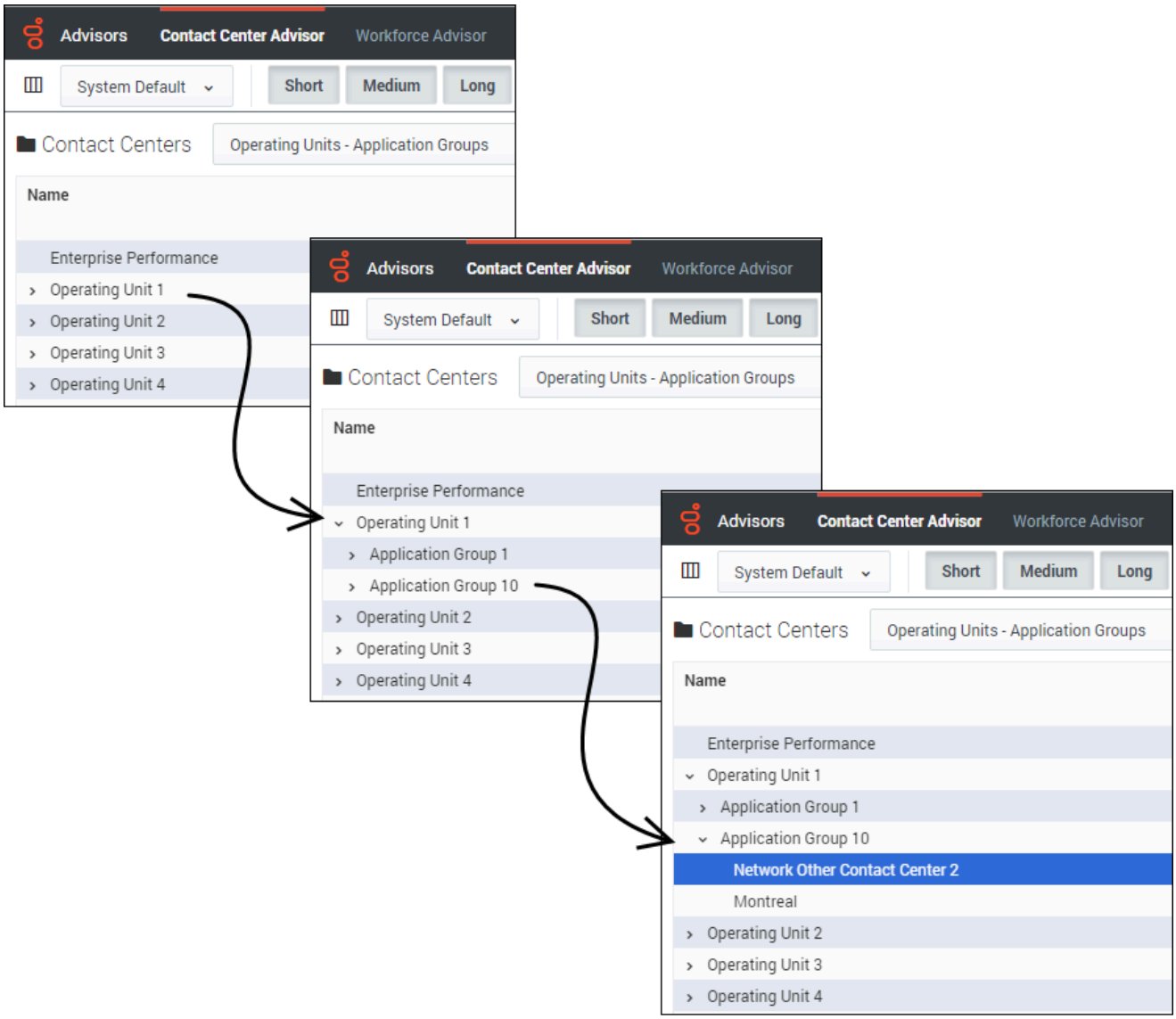
Advisors mobile view does not include **Column Chooser**. The easiest way to change the group of metrics that you are viewing and tracking in your mobile view is to select a different metrics library.

Metrics libraries are available for selection in the mobile dashboard **Filter** pane, but only if you have access to **Column Chooser** in the desktop application. Genesys recommends that you create metrics libraries using your desktop application's **Column Chooser** before attempting to change the list of metrics that you are viewing on a mobile device. However, if you need to display a metric on your mobile view that is not currently included in one of your metrics libraries, and you do not have access to a desktop device, then you can switch to desktop view on your mobile device, open **Column Chooser**, and change the list of metrics selected for dashboard display. The display of metrics in both your desktop application and your mobile view is updated whenever you make changes to the list of selected metrics in the desktop application's **Column Chooser** window. Refresh your mobile view to see the updated selection of metrics.

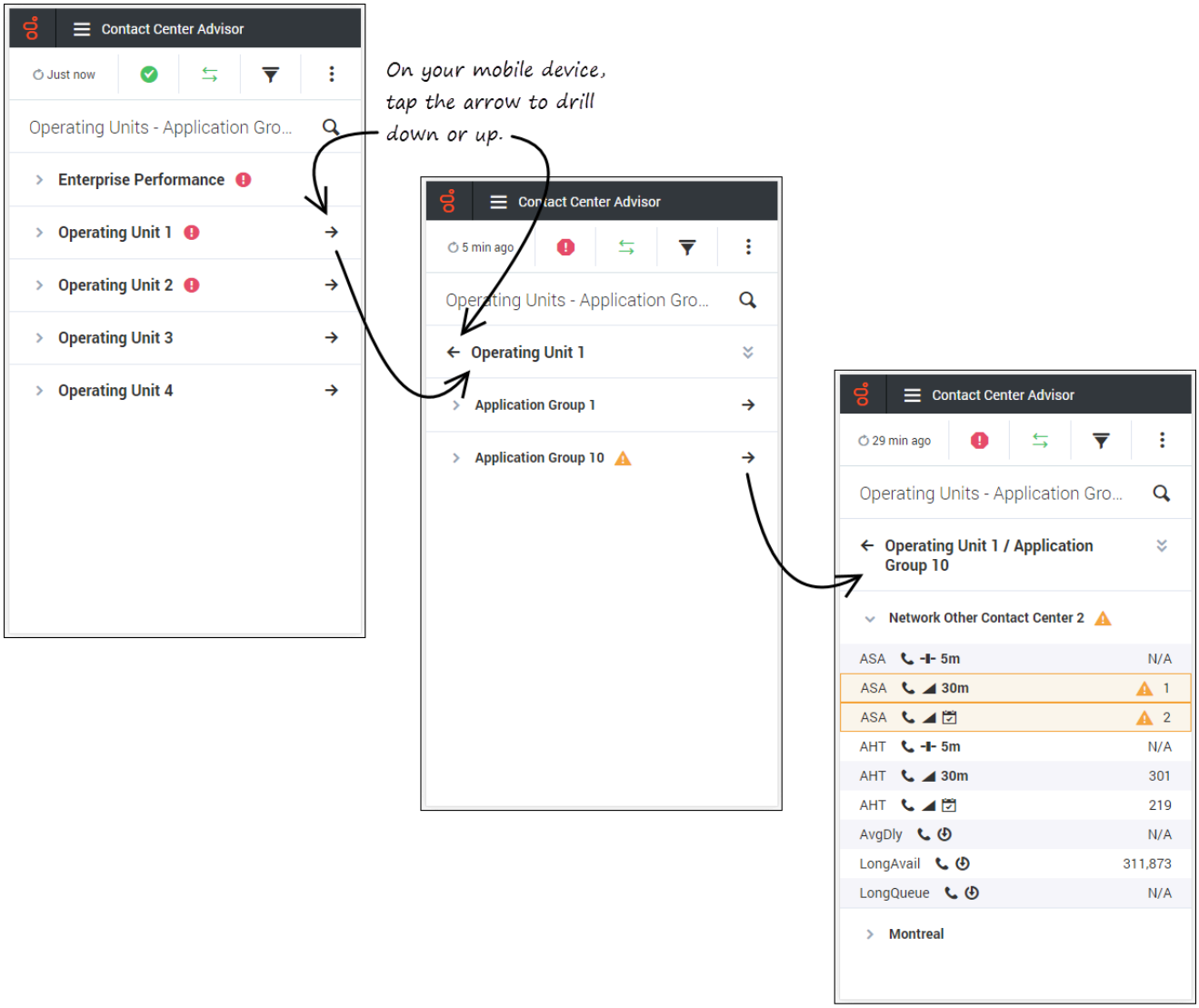
Example: Drilling down through the hierarchy in mobile view

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

The following figure shows how to drill down through the hierarchy in the **Contact Centers** pane when you use the CCAdv desktop application.

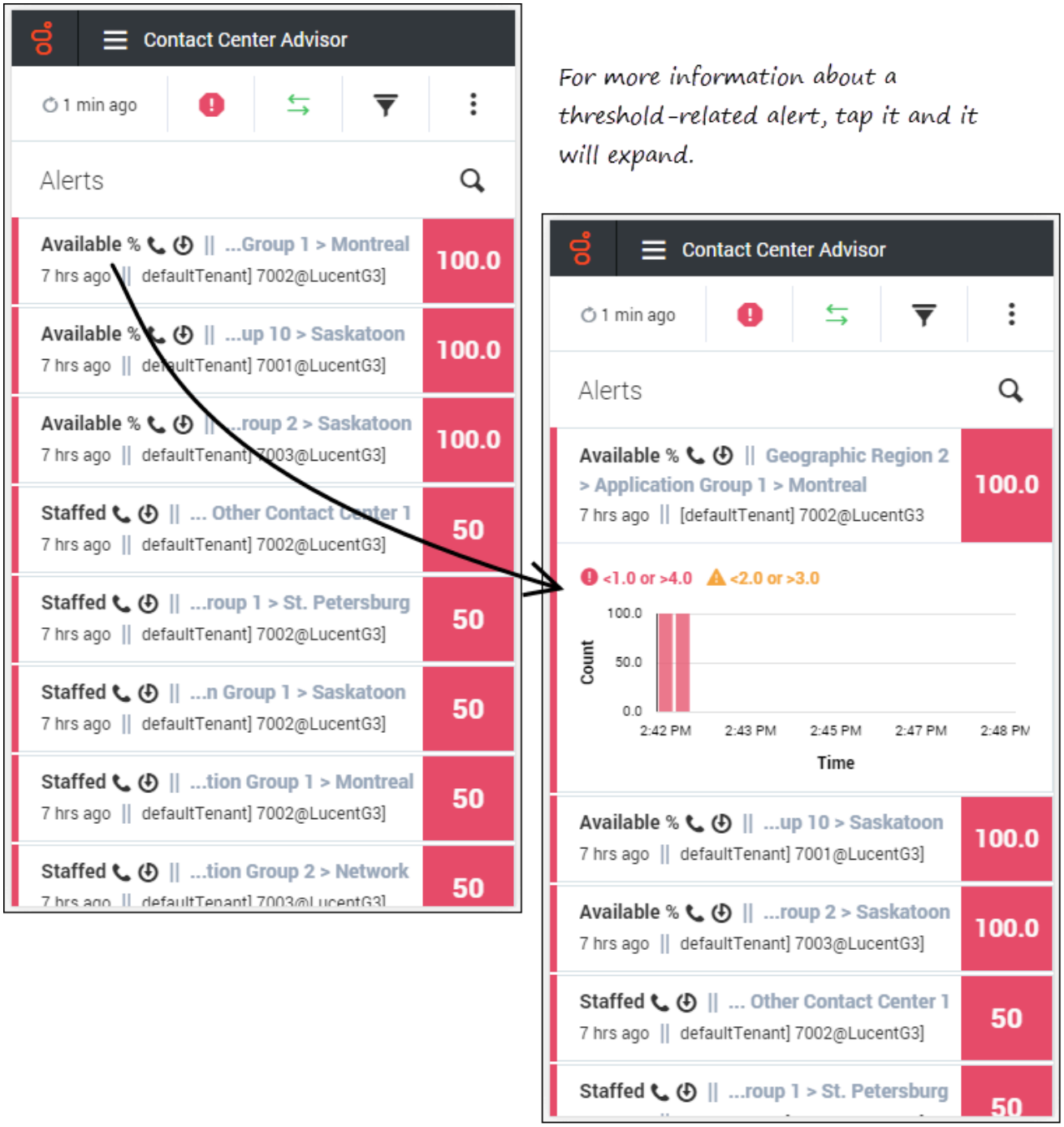


The following figure shows how to drill down through the hierarchy in the CCAdv mobile view. This is the same hierarchy that is demonstrated in the preceding figure. In the mobile view, you tap the arrow beside a business object name to drill down or up through the hierarchy.



Alerts Screen in Mobile View

The following figure shows the **Alerts** pane in the CCAdv mobile view. Threshold-related alerts display a summary view when you open the **Alerts** pane. You can tap this type of alert to expand it and find additional information.


Contact Center Advisor
1 min ago
Alerts
Available % || ...Group 1 > Montreal
7 hrs ago || defaultTenant] 7002@LucentG3]
100.0
Available % || ...up 10 > Saskatoon
7 hrs ago || defaultTenant] 7001@LucentG3]
100.0
Available % || ...roup 2 > Saskatoon
7 hrs ago || defaultTenant] 7003@LucentG3]
100.0
Staffed || ... Other Contact Center 1
7 hrs ago || defaultTenant] 7002@LucentG3]
50
Staffed || ...roup 1 > St. Petersburg
7 hrs ago || defaultTenant] 7002@LucentG3]
50
Staffed || ...n Group 1 > Saskatoon
7 hrs ago || defaultTenant] 7002@LucentG3]
50
Staffed || ...tion Group 1 > Montreal
7 hrs ago || defaultTenant] 7002@LucentG3]
50
Staffed || ...tion Group 2 > Network
50
For more information about a threshold-related alert, tap it and it will expand.
Contact Center Advisor
1 min ago
Alerts
Available % || Geographic Region 2 > Application Group 1 > Montreal
7 hrs ago || [defaultTenant] 7002@LucentG3
100.0
<1.0 or >4.0
<2.0 or >3.0
100.0
50.0
0.0
Count
2:42 PM
2:43 PM
2:45 PM
2:47 PM
2:48 PM
Time
Available % || ...up 10 > Saskatoon
7 hrs ago || defaultTenant] 7001@LucentG3]
100.0
Available % || ...roup 2 > Saskatoon
7 hrs ago || defaultTenant] 7003@LucentG3]
100.0
Staffed || ... Other Contact Center 1
7 hrs ago || defaultTenant] 7002@LucentG3]
50
Staffed || ...roup 1 > St. Petersburg
50

Accessibility

The Advisors accessibility interface functionality is a subset of JAWS Standard software. It provides audio and a series of keyboard shortcuts that can be used to navigate the tabulated information on the screen. The screen content is translated into voice in the local language. Additional language options are dependent on the version of Advisors used in your enterprise.

Accessibility Interface Home Page

The accessibility interface home page contains navigation links.

> **Important**
> The links are available only if you have permissions to use them (see Role-Based Access and Permissions).

The navigation links open the following pages:

- CCAdv/WA dashboard pages:
  - Reporting - Contact Centers
  - Reporting - Application Groups
  - Geographic - Contact Centers
  - Geographic - Application Groups
  - Operating Unit - Contact Centers
  - Operating Unit - Application Groups
- Additional WA dashboard pages:
  - Geographic Regions - Network CCs
  - Reporting Regions - Network CCs
  - Operating Units - Network CCs
  - Application Groups - Network CCs
- the Alerts page (applicable to both CCAdv and WA)

Navigation on the Home Page

Use the **TAB** key (move forward) and the **SHFT+TAB** key combination (move backwards) to move between links on the home page.

The accessibility software provides audio to identify each link when you select it. To open a page from a link, select the link and press **Enter** on your keyboard.

Dashboard Pages

When you open a dashboard page, the accessibility software reads the view name and navigation help tips.

The dashboard pages consist of tables that provide information associated with reporting regions, geographic regions, operating units, and application groups. In tables that contain metric values, the accessibility software notifies you if metric values have triggered a violation. The audio reads "critical" or "warning" after any metric value that is in violation.

The Contact Center Advisor accessibility interface groups the metrics that display on any dashboard page first by channel, then by time profile group, and finally alphabetically by metric name.

Alerts Page

To find the total number of critical and warning alerts, navigate to the **Alerts** page, which contains a table that provides information such as:

- metric names and descriptions
- metric values
- alert level for each metric (alerts are ordered by alert level: critical, then warning)
- description of each alert

Basic Navigation on Dashboard and Alerts Pages

To navigate using a link, select the link and press **Enter** on your keyboard.

Keyboard shortcuts can be used in conjunction with the screen reader accessibility software, as an alternative to the standard browser navigation. Information about the keyboard shortcuts is provided in the navigation instructions on the accessible dashboard pages.