



**Genesys 8.0**

# Resource Capacity Planning Guide

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## Preface

Welcome to the *Genesys 8.0 Resource Capacity Planning Guide*. This addition to the Genesys documentation set describes the methodology and inner workings of the planning tools Genesys now offers to assist you in managing human resources in a multimedia contact center environment.

This chapter provides an overview of this guide, identifies the primary audience, introduces document conventions, lists related reference information, and invites your feedback:

- [About Resource Capacity Planning, page 5](#)
- [Intended Audience, page 6](#)
- [Chapter Summaries, page 6](#)
- [Making Comments on This Document, page 6](#)
- [Contacting Genesys Technical Support, page 7](#)
- [New in This Release, page 7](#)

This guide is valid only for the 8.0.x release(s) of this product.

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## About Resource Capacity Planning

Resource capacity planning within a Genesys software environment enables you to create and manage routing strategies for different media types as they apply to various Genesys-defined resources, such as directory numbers, e-mail, chat sessions, and more.

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## Intended Audience

This guide, primarily intended for system and contact-center administrators, assumes that you have a basic understanding of:

- Computer-telephony integration (CTI) concepts, processes, terminology, and applications.
- Network design and operation.
- Your own network configurations.

You should also be familiar with Genesys Framework architecture and T-Server and Stat Server functions.

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## Chapter Summaries

In addition to this preface, this guide contains the following chapters:

- [Chapter 1, “Overview,” on page 9](#), defines some key terms used in this document. This chapter also describes Genesys’s distribution method of interactions prior to the Resource Capacity Model.
- [Chapter 2, “Resource Capacity Wizard,” on page 17](#), describes how to install and operate the Resource Capacity Wizard to create capacity rules.
- [Chapter 3, “Using the Capacity Rule Editor,” on page 27](#), describes the elements of this graphical user interface and how to add and define media rules to your capacity rule.
- [Chapter 4, “Assigning Capacity Rules to Resources,” on page 39](#), demonstrates how to associate capacity rules to Person, P L ace, and Tenant objects.
- [Chapter 5, “Genesys-Provided Capacity Rules,” on page 45](#), provides the in-depth media definitions of the three Genesys Capacity rules provided with this release.
- [Chapter 6, “Capacity Snapshot,” on page 49](#), describes how to interpret capacity vector that Stat Server records in its log.
- [Chapter 7, “Troubleshooting Capacity Rules,” on page 53](#), describes how to correct some commonly encountered errors.

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## New in This Release

This *Genesys 8.0 Resource Capacity Planning Guide* introduces the following features:

- Support for operation of the Resource Capacity Wizard on the Windows Vista platform. This and other supported platforms are listed beginning on [page 17](#).
- Ability to configure one or more security banner(s) for display to users before the Resource Capacity Wizard is invoked. You configure this feature during the installation of the Wizard, which is described beginning on [page 18](#).

- Additional tips for troubleshooting capacity rules when you cannot alter them or when you cannot save the changes that you have successfully made, which are described beginning on [page 55](#).

Other new features for configuring Stat Server statistic definitions and the Stat Server application are described in the *Framework 8.0 Stat Server User's Guide* and the *Framework 8.0 Stat Server Deployment Guide*, respectively.





## Chapter

# 1

## Overview

Resource Capacity Planning (RCP) represents Genesys's latest methodology for distributing contact-center interactions. Stat Server is the principle element at the core of resource capacity planning, feeding the capacities of resources to Multimedia and Universal Routing servers—information that is needed to make intelligent routing decisions. Together with the business-priority planning that you define, RCP enables you to better manage agent workload and interaction delivery.

This chapter contains the following sections:

- [What Is a Capacity Rule?, page 9](#)
- [How to Use Capacity Rules, page 11](#)
- [Genesys Resource Allocation Prior to RCP, page 12](#)
- [Capacity Planning for Voice Interactions, page 13](#)
- [Capacity Planning for Multimedia DNs, page 14](#)

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## What Is a Capacity Rule?

A major element of Resource Capacity Planning is a capacity rule, which defines a resource's ability to handle multiple interactions. For RCP methodology, the term *resource* is synonymous to a Person object that is configured as an Agent and defined in the Configuration Layer. A *capacity rule* is a set of logical expressions that specify the boundaries of a resource's ability to handle one interaction or more than one simultaneous interaction of differing media types.

Even though the capacity planning tools enable you to define rules for all Genesys-provided media types, it makes sense to use only the media types that your set of Genesys solutions supports. The current Multimedia 8.0 release, for example, supports chat, email, sms, (short message service), and open-media media types for capacity planning.

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Note: Interactions categorized under the `webform` media type, which was available in prior releases, are now processed as `email` interactions.

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### Applying a Capacity Rule to Resources

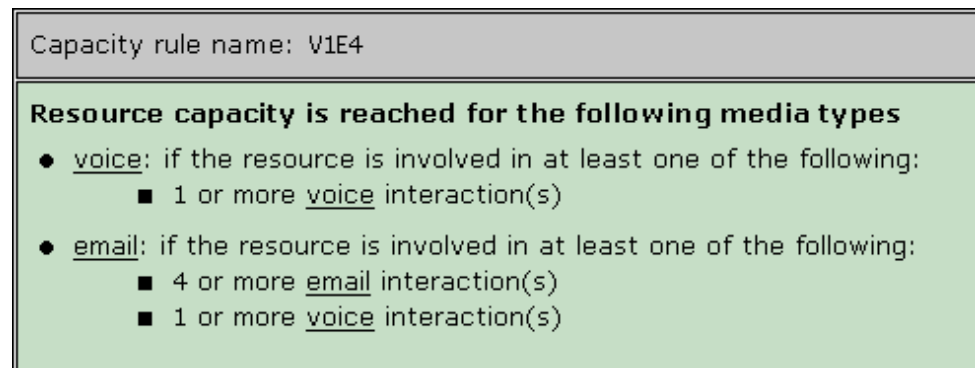
You can directly associate a capacity rule to an agent (a `Person` object, that is) using Configuration Manager. In such a case, the capacity rule describes the agent's ability to receive interactions. You can also associate a capacity rule to a `Place` object within Configuration Manager. In this case, the rule applies to all agents logged in to that place who do not already have a capacity rule directly assigned to them (that is, to their `Person` objects). Lastly, you can associate a capacity rule to a `Tenant` object. The capacity rule applies to all agents belonging to the tenant where no capacity rule is directly assigned to those agents (or their corresponding places). (In single-tenant environments, the tenant is the entire contact center.) For details on how to associate capacity rules to resources, see [Chapter 4](#).

Please note, however, that capacity rules only affect the *distribution* of interactions. Capacity rules do not preclude the agent from initiating any number of interactions of any media type on his or her own prerogative.

### Media Rules

A capacity rule consists of a set of media types and expressions. For every media type, a *media rule* within the capacity rule expresses the boundaries of the agent's ability to receive interactions of that particular media type.

By means of media rules, you might define an appropriate workload for an agent for every media that the agent is enabled to handle. While defining a rule for a specific media, you might consider the simultaneous workload for another media. [Figure 1](#), for example, illustrates a simple capacity rule, named `V1E4`, that contains two media rules.



**Figure 1: A Sample Capacity Rule with Two Media Rules**

When assigned to a specific resource—Susan, for example—the `V1E4` capacity rule enables the simultaneous distribution of up to four e-mail interactions to her when she is not working on a voice interaction—that is, when her phone line(s) is (are) free. Furthermore, a new voice interaction could be distributed to Susan if she is currently conducting:

- No other voice interactions and/or
- Any number of e-mail interactions.

Conversely, an e-mail interaction cannot be distributed to Susan if she already is working on four e-mail interactions or if she is already working on a voice interaction. However, if Susan has only two e-mail interactions and no voice interactions, then up to two new e-mail interactions that enter the contact center could be distributed to her, *within the confines of resource capacity planning*. Other factors, outside RCP, might disqualify or prevent her from receiving new interactions. For instance, she might have logged off the email media type and surrendered her license to receive e-mail interactions; she might not possess the required skills to handle a particular interaction; her status might be `NotReadyForNextCall` or she might be performing after-call work; or the environment's routing strategy might favor the distribution of e-mail interactions to another agent over her.

Other factors aside, this capacity rule does allow Susan to work with several e-mail interactions simultaneously. Moreover, the capacity rule allows her e-mail-related work to be interrupted when a voice call—generally considered to be a higher priority type of interaction—arrives. You can artificially establish the priority of media types in your contact-center environment by designing and applying your own capacity rules. [Chapters 2 and 3](#) introduce the tools you will need to use to accomplish this.

A media rule might be thought of as a logical expression that is applied against the current number of agent interactions per medium. These logical expressions (media rules) define when the system considers that agents are no longer available for a new interaction for that particular medium. Media rules are evaluated in runtime for agents, and the Universal Router Server uses these results to make intelligent routing decisions. Consequently, agents may have several simultaneous interactions. If capacity is reached for one particular media type, the agent might still be available for interactions of other media types.

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## How to Use Capacity Rules

A useful application of resource capacity planning might be to create capacity rules and apply them to the following:

- Agents or collections of agents (not agent groups) of different abilities. You can create different capacity rules for such cases and assign the different rules to agents who have different abilities. (In this release, capacity rules cannot be assigned to `GroupAgents` or `GroupPlaces` objects.) For example, you could create a `Seasoned` capacity rule and assign it to agents who can handle more chat interactions, for example, than less-qualified agents. (To the latter, you would assign any of the `NewHire`, `AvgWorkload`, or `1ChatOnly` capacity rules that you might create.)
- Expert agents—preserving their time by setting an artificially low setting of capacity, to prevent from overloading them.

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Note: Whether Stat Server considers (in its determination of resource capacity) the interactions that are initiated or received while the agent-associated directory number (DN) is in after-call work (ACW) status is configurable. Review the description of the `capacity-treat-acw-as-interaction` Stat Server configuration option in the *Framework 8.0 Stat Server Deployment Guide* for more information.

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## Genesys Resource Allocation Prior to RCP

The routing-allocation model that Genesys used prior to resource capacity planning depended on the state of an agent and the status of the agent's DN as determined by Stat Server. This dependency focused heavily on the Genesys telephony model, which is described in the “Genesys Telephony Model” section of the *Reporting Technical Reference Guide*.

The Genesys router, at the point of interaction distribution, selects a target—an agent—from a pool of potential participants that consists only of *ready* agents. Ready, from the router's default perspective, signifies that an agent has either of the following:

- No monitored interactions currently in progress or
- *All* monitored DNs in Ready state. (Other DNs assigned to the agent can reside in a less-than-Ready state, such as Monitored or NotMonitored as determined by the ranking that is provided in Stat Server's Status Priority tables.)

However, if you have set the router's `useAgentState` configuration option to `false`, Ready signifies that an agent has either of the following:

- No monitored interactions currently in progress.
- *At least one* monitored DN in Ready state. (Other DNs that can be assigned to the agent can reside in a less-than-Ready state, such as Monitored or NotMonitored as determined by the ranking that is provided in Stat Server's Status Priority tables.)

As a result of this ready-agent view, Genesys software, prior to resource capacity planning, supported a one-at-a-time model of interaction distribution. With few exceptions, this model is still well suited for environments that distribute live voice interactions. It does not, however accommodate situations in which an agent can receive and handle additional live voice calls while the agent is already actively involved in one—as might be preferable in rare situations in which a high-priority call, for example, enters the contact center and no other qualified agent is “ready” to handle it. (Given this scenario, the agent could place one call on hold and accept the second call.)

This ready-agent view is also not well suited for non-telephony-related media, such as e-mail, and is not particularly effective in blended media environments, such as those that distribute voice, e-mail, and chat interactions. To accommodate the distribution of multiple media, the 6.1 release of Universal

Routing Server extended its strategy language to project the DN model onto interactions of nontelephonic types. This projection required DN configurations for media types such as email and chat—and not just one DN, but a separate DN for each of the interactions that agents could potentially handle simultaneously, for each media type, and for each agent. The number of interactions that an agent can simultaneously handle held a one-to-one correspondence to the number of DNs that are configured for that agent.

This “Media DN” model, however, did not depict reality; it did not allow the distribution of a voice interaction, for instance, to a particular agent if that agent was already participating in an e-mail interaction, nor could one specify that the agent was able to accept and participate in a predefined number of interactions simultaneously.

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## Capacity Planning for Voice Interactions

Because many different types of telephony devices are continually being produced, attention should be paid during capacity planning to some peculiarities in the ways that Genesys software routes voice interactions. Genesys software continually evolves to meet new capabilities. Whereas the initial release of capacity planning limited to one the number of voice interactions that the Genesys router could direct to a particular Genesys place, now the Genesys router can route more than one voice interaction to a Genesys place—under certain circumstances.

*A single-DN place* is a device that has only one directory number ascribed to it.

As a general rule, in regard to Genesys environments that uses a nonSIP (Session Intuition Protocol) Server, Genesys capacity planning enables routing to *single-* or *multi-DN places* where an agent performs a login to each DN. When DNs exist at a place to which the agent does not log in, Genesys software does not consider those DNs in its calculation of resource capacity.

*Multi-DN places* or *multiline DNs* are devices that have more than one directory number ascribed to them.

Routing of more than one call to a *multi-line DN* within a Genesys environment is currently unavailable in this release. Meridian and Meridian Link Symposium phones, for instance, present special examples of multiline DNs that occupy two DNs for each Genesys place—a Position DN and an Extension DN. For this particular configuration, the Genesys Stat Server logs DN status against the Position DN, but only the Extension DN is accessible to the Genesys router for directing calls. Ensure that you consider this when incorporating capacity planning into your routing strategies. IVR phones present additional examples of multiline DNs for which the Genesys capacity model is unable to direct more than one voice interaction at a time.

There are two exceptions to this general rule:

- The Genesys router can route calls to voice treatment port DNs (IVR DNs) without requiring that agent logins be simulated on these DN types.

- In a Meridian 1/Meridian Link Symposium model, it is the Position DN that the agent logs in to, not the Extension DN. However, the Genesys router routes calls—one at a time—to the Extension DN, given an agent login on the Position DN.

## Capacity Planning for Multimedia DNs

Prior to the 7.6 release, Genesys capacity planning, from the routing perspective, treated multiline DN devices (such as IP phones that have simultaneous video and multiline DN capabilities) as single-line, voice DNs. Genesys software permitted the routing of one and only one voice interaction, for instance, to these DNs, provided that no other voice interaction was already occurring at the DN. The presence of an interaction on a DN prevented the routing of another interaction to that DN, even though the DN was capable of handling an additional interaction of a different media type. Furthermore, each DN was associated with a single media type.

A *multimedia DN* is a single directory number that can receive simultaneous interactions of more than one media type.

The Stat Server 7.6 release introduced support for the *multimedia DN*—a DN type that is controlled by SIP Server. To specify the physical capacity of a multimedia DN, the `voice` configuration option was introduced in the Framework 7.6 release for `Extension`-type DN objects. Setting this option to `true` enables you to specify whether capacity for voice interactions applies to the multimedia DN. Multimedia DN capacity settings propagate to capacity rules for supported resources. Refer to the “Configuring DNs to Handle Instant Messaging” procedure in the *Genesys Instant Messaging Solution Guide* for more information on this topic.

Unlike a single-media DN, a multimedia DN supports multiple media (for example, voice and chat) on each DN. Introduction of this multimedia DN to a Genesys contact-center environment enhances the resource capacity model by enabling the Genesys Universal Router Server (URS) to route multiple interactions to a single instance of such a DN. The model now enables URS to route one or more of chat and/or voice interactions to the same DN if the DN is configured as `multimedia`, its type is `Extension`, and the servicing T-Server is SIP-compliant.

To support this new functionality, the semantics of actions that are generated by Stat Server for statistic and status calculation of multimedia DNs have been updated. In addition to prior classifications, actions can now be *media-dependent* or *media-independent*. Furthermore, media-dependent actions can be further classified as *media-unique* or *media-common*.

An action is *media-unique* if only one action of a particular media type can exist on a device. For example, the `LoggedIn` action is *media-independent*. Generation of this action does not rely on the media channel to which an agent registers. Contrarily, the `CallInbound` action is *media-dependent*, because inbound interactions in the current capacity model are always associated with only one media type. Furthermore, the `CallInbound` action is *media-common*.

In fact, all call-related actions are media-dependent and media-common. The `WaitForNextCall`, `NotReadyForNextCall`, and `AfterCallWork` actions that occur on multimedia DNs are classified as media-dependent and media-unique.

Prior classifications of actions ran along the following lines and are still applicable to multimedia DNs:

- Actions are either durable or instantaneous.
- Actions are either related to interactions or not.
- Actions are generated for either mediation DNs or regular (or multimedia) DNs.

Refer to the *Framework Stat Server User's Guide* for a complete listing of how Stat Server-generated actions are categorized.







## Chapter

# 2 Resource Capacity Wizard

The Resource Capacity Wizard (RCW) is one of the many Genesys Framework and Solution Wizards that you invoke from the Genesys Wizard Manager. (The Genesys Wizard Manager is described in the *Framework 8.0 Deployment Guide*.) Use RCW and its Capacity Rule Editor (CRE) to create new capacity rules or modify existing ones. In multi-tenant environments, you can also copy capacity rules and paste them among different tenants within Configuration Manager. Genesys recommends that you do not use any other method to create or manage Genesys capacity rules.

This chapter describes how to use the Resource Capacity Wizard. It contains the following sections:

- [Prerequisites, page 17](#)
- [Installing the Resource Capacity Wizard, page 18](#)
- [Invoking the Resource Capacity Wizard, page 20](#)
- [Creating a Capacity Rule from Scratch, page 21](#)
- [Creating a Capacity Rule from an Existing Rule, page 23](#)
- [Reconfiguring Capacity Rules, page 23](#)
- [Deleting Capacity Rules, page 24](#)
- [Uninstalling the Resource Capacity Wizard, page 25](#)

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## Prerequisites

You can operate the Resource Capacity Wizard on the following Windows platforms:

- Windows Server 2003 (32- and 64-bit systems)
- Windows XP SP2 or higher
- Windows Vista (32-bit systems)

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Note: Microsoft XML Core Services 4.0 Service Pack 2 must be installed on this platform.

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To invoke the Resource Capacity Wizard, your release of Configuration Server must be 7.0.1 or higher.

## Installing the Resource Capacity Wizard

You can deploy only one instance of the Genesys 8.0 Resource Capacity Wizard on any given host. If the Wizard is already installed, you must uninstall it first before installing it anew. Refer to [page 25](#) for instructions on uninstalling the Wizard.

1. From the Real-Time Metrics CD (or image), open the `configuration_wizard_capacity` folder and click `setup.exe`.
2. At the Welcome dialog box, click Next.
3. At the Security Banner Configuration dialog box, decide whether to configure a security banner for user entry to the Resource Capacity Wizard application. If configured, this security banner will prompt the user to accept or reject conditions of use before the Wizard is invoked.

If you mark the `Enable Security Banner` box, additional options, which are shown in [Figure 2](#), appear on this dialog box and prompt you to apply this feature to all Genesys applications that support it or only to the current application. Click Next.

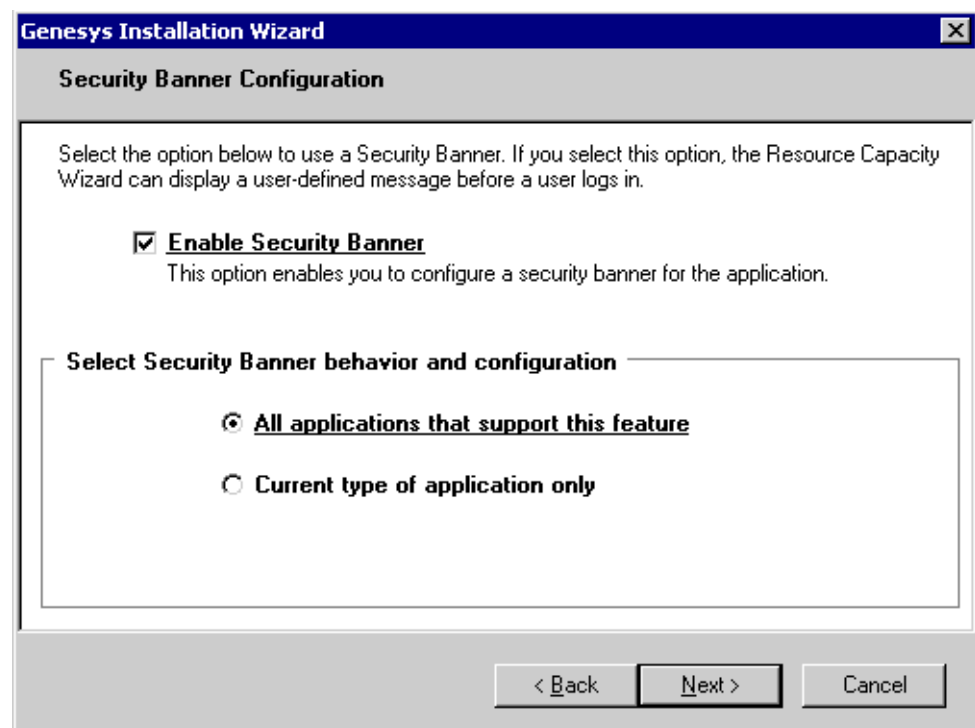


Figure 2: Configuring a Security Banner

4. If you opted to display a security banner at [Step 3](#), in the Security Banner Parameters dialog box, configure the following parameters:
  - When to display the security banner during the next launch of the Resource Capacity Wizard (either every time the application starts or at the user's discretion)
  - How the application should process a login if the banner cannot be displayed (proceed or exit)
  - The title to display on the browser
  - The amount of time that should elapse before the application displays a temporary message in the event that the security banner has not yet loaded
  - The height and width of the security banner

**Tip:** If you leave the height and width fields blank, the resultant browser window for the security banner will automatically resize to fit the content. However, if you do specify values and later want to change them, you can edit the Height and Width entries directly in the Windows registry under the following:  
 HKEY\_LOCAL\_MACHINE\SOFTWARE\GCTI\UniLogin\Banner

For the first two configuration parameters, predefined choices are available in list boxes from which you can select.

If you opted not to display a security banner to your users, skip to [Step 7](#).

5. Toward the bottom of the Security Banner Documents dialog box, input the Uniform Resource Locator (URL) of your security message and add it to the list that is above the URL field.

You can configure more than one security banner to display to users. For each subsequent security message that should be displayed, enter its URL too and add it to the list. Then, click Next.

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Note: The installation routine does not validate URLs.

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6. If you elected not to have the Wizard invoked when the security banner cannot be displayed at [Step 4](#) (second bullet), toward the bottom of the Security Banner Error Documents dialog box, enter the URL of your error page(s) and add it to the list that is above the URL field, or leave this field blank. Then, click Next.

If you elected to proceed (at the second bullet of [Step 4](#)), this dialog box does not appear. Proceed to [Step 7](#).

7. At the Ready to Install dialog box, click Install.

The installation routine copies the files that are needed to operate the Resource Capacity Wizard to the directory in which the Genesys Wizard Manager was installed.

8. In the Installation Complete dialog box, click Finish.

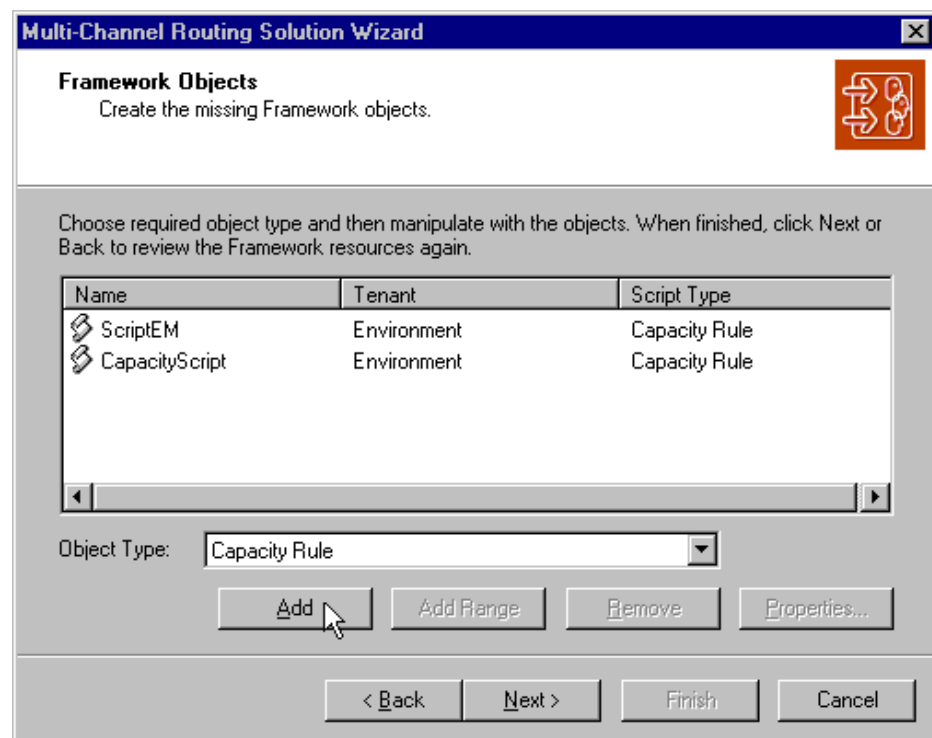
Installing the Resource Capacity Wizard also installs its Capacity Rule Editor.

## Invoking the Resource Capacity Wizard

You can invoke RCW from a number of locations including:

- The Multimedia Wizard. (From the Framework Objects screen, select a Capacity Rule object type and click Add as shown in Figure 3.)
- Configuration Manager. Right-click the Scripts folder and select Wizard > New > Capacity Rule from the context menu that appears.

After you have invoked RCW, you can select one of the two methods to create a capacity rule. Both methods are discussed in the sections that follow.



**Figure 3: Calling the Resource Capacity Wizard from the Multimedia Wizard**

**Note:** The installation routine deploys a Resource Capacity Wizard program folder inside the Programs > Genesys Solutions > Framework folder (accessible from the Start menu). The command that is available in this folder invokes the general Genesys Wizard Manager, not the Resource Capacity Wizard directly.

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# Creating a Capacity Rule from Scratch

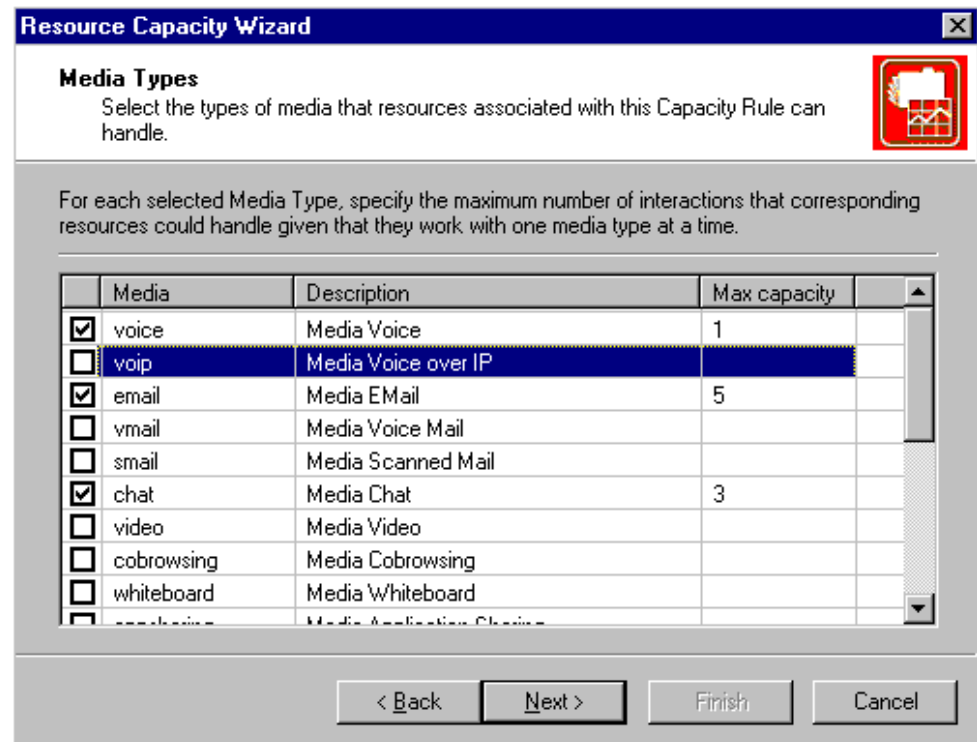
Use the following method if the capacity rule that you intend to create significantly differs from any other that is already created for your tenant.

1. Invoke the Resource Capacity Wizard by using one of the methods that is described in the previous section.
2. In the Welcome screen, click Next.
3. In the Capacity Rule Name screen, type a unique name for the capacity rule, provide a brief description if you want, and click Next.

The capacity rule that you name here is stored in the Scripts folder of the Configuration Manager when you complete the Wizard.

4. In the Creation Method screen, choose Create from scratch and click Next.
5. In the Media Types screen (shown in [Figure 4](#)):
  - a. Choose the media types for which you want to define a capacity rule by selecting or clearing the check box that precedes each media type. The Wizard displays the media types that have been previously configured for the current tenant, including custom media types.  
  
Under typical circumstances, you will need just three media types: voice, email, and chat.
  - b. For each selected media, in the Max Capacity field, specify a realistic maximum number of interactions that a corresponding resource can reasonably handle simultaneously, under the assumption that only interactions of this media type are present.  
  
The number that you specify must be a positive integer between 1 and 255. When you clear a media check box, the Wizard automatically clears the value in the Max Capacity field.
  - c. When you are done, click Next.

The media types and maximum values that you specify at this screen are used during the next step should you invoke the Capacity Rule Editor. [Figure 4](#), for example, shows three media types having been selected at this screen.



**Figure 4: Selecting Media Types for Your Capacity Rule**

6. In the Important Information screen, invoke the Capacity Rule Editor and refine the media rules if you want your capacity rule to consider resource workloads that consist of interactions of different media. Otherwise, the capacity rule will not consider that a resource's workload for one particular media can influence the resource's workload for other media types. When you exit the Capacity Rule Editor, the Wizard returns you to the Important Information screen. Click Next.

Refer to Chapter , which begins on [page 27](#), for instructions on how to operate the Capacity Rule Editor.

7. In the Summary screen, click Finish.

---

Note: If your capacity rule script contains errors, you must click the Back button to correct them before you terminate the Wizard. Otherwise, the Wizard will not save the script.

---

If you want to change the capacity rule after you have left the Wizard, right-click the name of the script in Configuration Manager. Then, from the context menu that appears, select Wizard > Configure to reinvoke the Wizard. Finally, open the Capacity Rule Editor that is accessible from the Advanced tab.

---

Note: You can also create a capacity rule by creating a Script object of Capacity Rule type within Configuration Manager. In this case, the Resource Capacity Wizard creates an empty, invalid rule. You must configure it by using the Resource Capacity Wizard, before Stat Server can use it.

---

---

## Creating a Capacity Rule from an Existing Rule

1. Invoke the Resource Capacity Wizard using one of the methods described on [page 20](#).
2. In the Welcome screen, click Next.
3. In the Capacity Rule Name screen, type a unique name for the capacity rule, provide a brief description if you want, and click Next.  
The Wizard does not allow you to advance to the next screen, if you have not provided a unique name.
4. In the Creation Method screen, choose Create from existing rule and click Next.
5. In the Existing Capacity Rules screen, choose the desired rule from the list and click Next.
6. In the Used Media screen, verify that the media types that are selected and the maximum capacities that are indicated are appropriate for your new capacity rule—or change them accordingly—and click Next. (Figure 11 on [page 36](#) shows this dialog box.)  
At this screen, the Wizard displays media types that have been previously configured for the current tenant, including custom media types.
7. At the Important Information screen, invoke the Capacity Rule Editor if you want to change the definitions of the constituent media-type rules. The Wizard copies these definitions from the existing capacity rule that you selected at [Step 5](#). When you are done, click Next.
8. In the Summary screen, click Finish.

---

## Reconfiguring Capacity Rules

You can reconfigure an existing capacity rule, after you have created it:

1. From Configuration Manager, right-click the specific capacity rule in the Scripts folder.
2. From the context menu that appears, select Wizard > Configure.

3. From the Script Properties dialog box that appears, click the Advanced tab. Figure 5 shows this dialog box for a sample script.
4. Choose the appropriate media, and specify the maximum capacity for those media.
5. Invoke the Capacity Rule Editor to change the definitions of constituent media-type rules. When you are done, exit the Capacity Rule Editor.
6. Click OK at the bottom of the Script Properties dialog box.

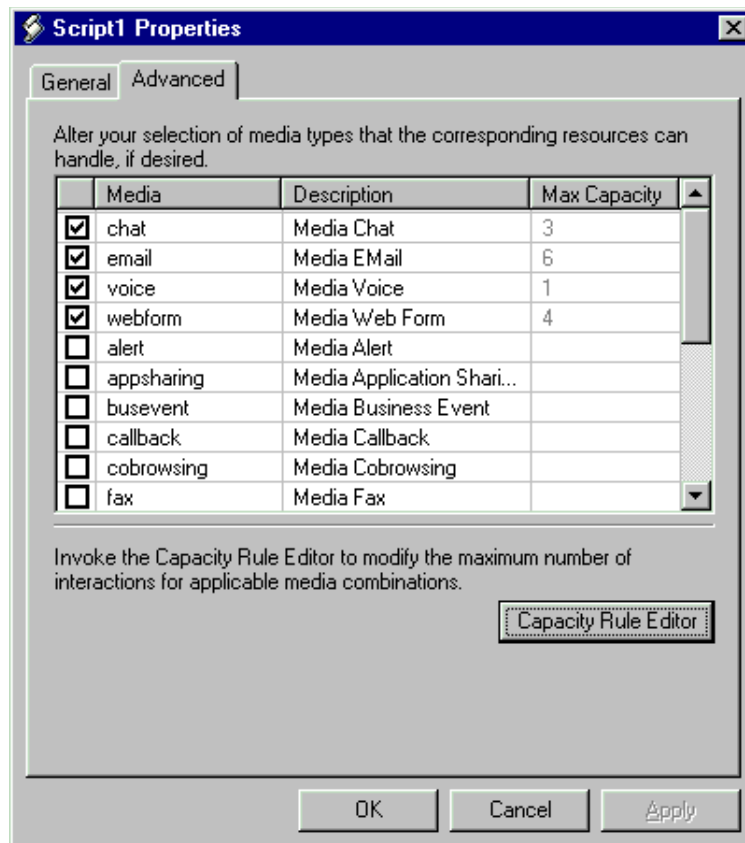


Figure 5: Properties of a Sample Capacity Rule Script

## Deleting Capacity Rules

You can remove a capacity rule script from the Configuration Layer by deleting the corresponding script object in Configuration Manager. You should exercise caution, however, when you perform this action. Make sure that the capacity rule that you are about to delete is no longer assigned to Person, Place, or Tenant objects. Deleting a capacity rule while it is still assigned to resources might render the resource unavailable to some or all media. Consult the *Multimedia Reference Manual for more information*. The software does not warn you of these circumstances. Deleting the script object automatically removes any assignments of the script to Person, Place, or Tenant objects.



---

# Uninstalling the Resource Capacity Wizard

Uninstalling RCW removes neither any capacity rule scripts from the Configuration Layer nor their assignments to resource objects. You are not required to uninstall RCW if you want to upgrade its version from a previous family.

## Uninstalling from the Control Panel

To uninstall the Resource Capacity Wizard from the Control Panel:

1. Select **Add/Remove Programs**.
2. Select **Genesys Resource Capacity Wizard 8.x** from the list, and click **Add/Remove**.
3. Click **Yes** in the **Confirm File Deletion** dialog box.

## Uninstalling from the Application Executable

To uninstall the Resource Capacity Wizard from the Wizard installation package:

1. Double-click **setup.exe**.
2. In the **Welcome** screen, mark the **Remove** button and click **Next**.
3. In the confirmation dialog box, click **Yes**.
4. In the **Maintenance Complete** screen, indicate when to reboot the computer, and click **Finish**.





Chapter

# 3

## Using the Capacity Rule Editor

The Capacity Rule Editor (CRE) is a special mode of the Resource Capacity Wizard (RCW). You use the Editor if you need to create a more complex capacity rule than the default rule that is created or if you must alter an existing, complex capacity rule. Complex capacity rules take into account the interdependencies among different media.

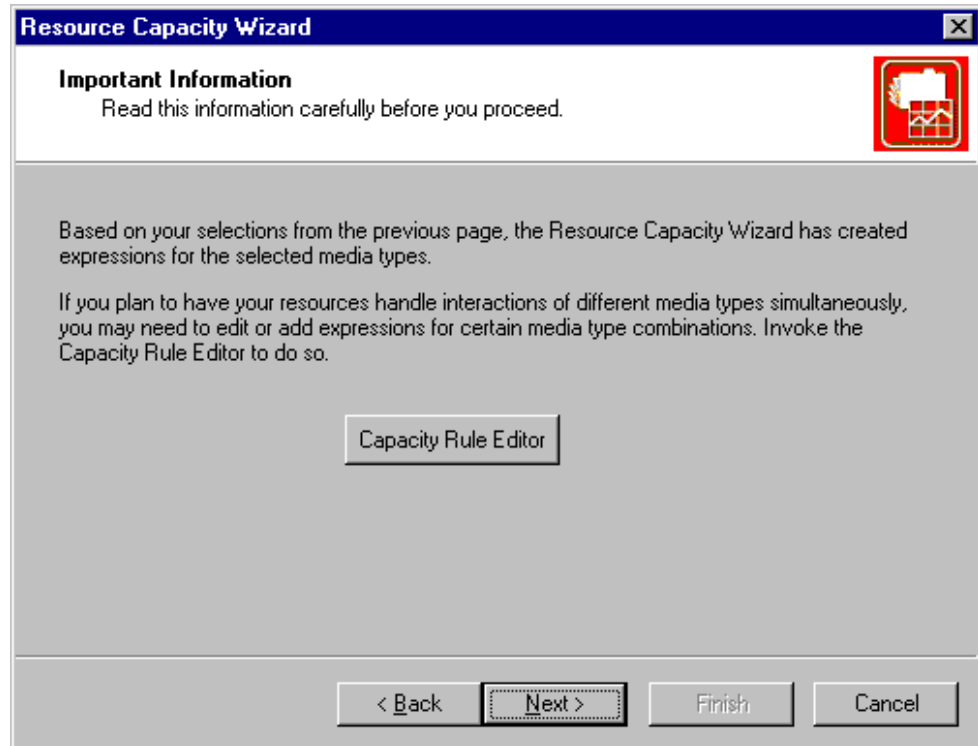
This chapter discusses the Capacity Rule Editor within the following contexts:

- [Invoking the Capacity Rule Editor, page 27](#)
- [Exploring the Interface, page 29](#)
- [Creating a Capacity Rule from Scratch, page 33](#)
- [Creating a Capacity Rule from an Existing Rule, page 35](#)
- [When Internal Logic Supersedes, page 36](#)

---

### Invoking the Capacity Rule Editor

The Important Information screen ([Figure 6](#)) of the Resource Capacity Wizard includes a button to invoke the Editor. To look at the capacity rule that the Resource Capacity Wizard has created, based on your selections in the Media Types screen ([Figure 4](#) on [page 22](#)) (or Used Media screen [[Figure 11](#) on [page 36](#)]), click this button. You should also invoke CRE if you want to create or edit a complex capacity rule that involves interdependencies among different media.



**Figure 6: Opening the Capacity Rule Editor from the Resource Capacity Wizard**

When you have created your capacity rule, perform the following steps to revisit its definition:

1. With your script object selected in Configuration Manager, right-click and select Wizard > Configure from the context menu that appears.
2. In the resulting dialog box, click the Advanced tab and select Capacity Rule Editor from the lower right-hand corner as shown in [Figure 7](#).

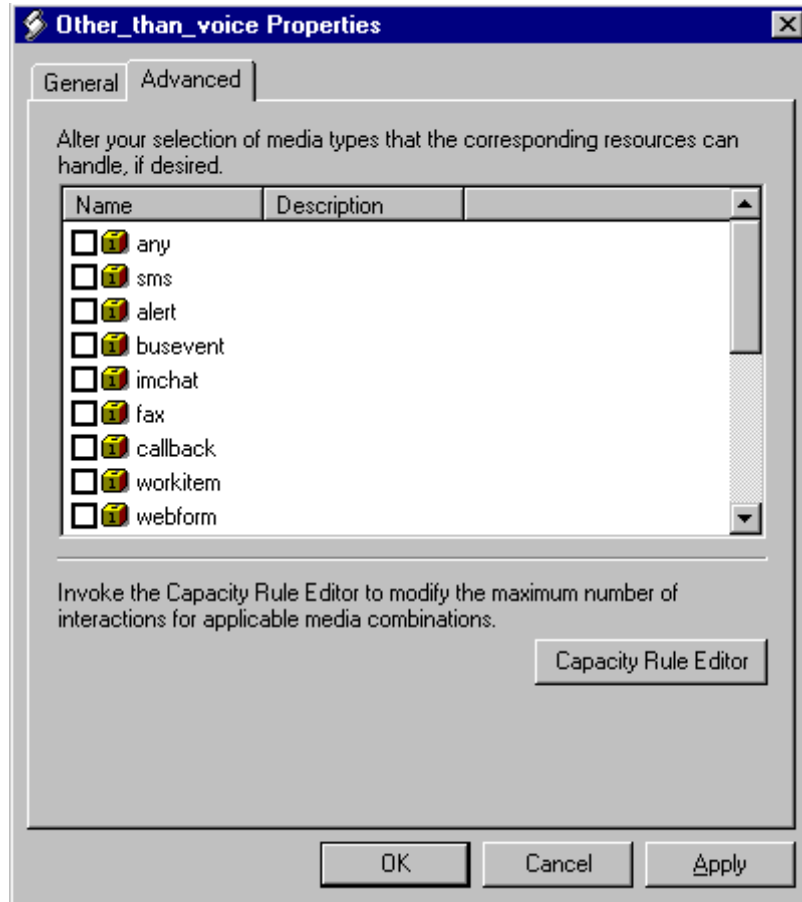


Figure 7: Opening the Capacity Rule Editor from the Properties Page

---

## Exploring the Interface

The Capacity Rule Editor interface does not use menus or menu items. Instead, you execute commands by clicking buttons that are positioned across the top of the Editor or by clicking the buttons or hyperlinks that are within the main window. [Figure 8](#) shows the main window and some of its hyper-elements for a capacity rule that is already developed.

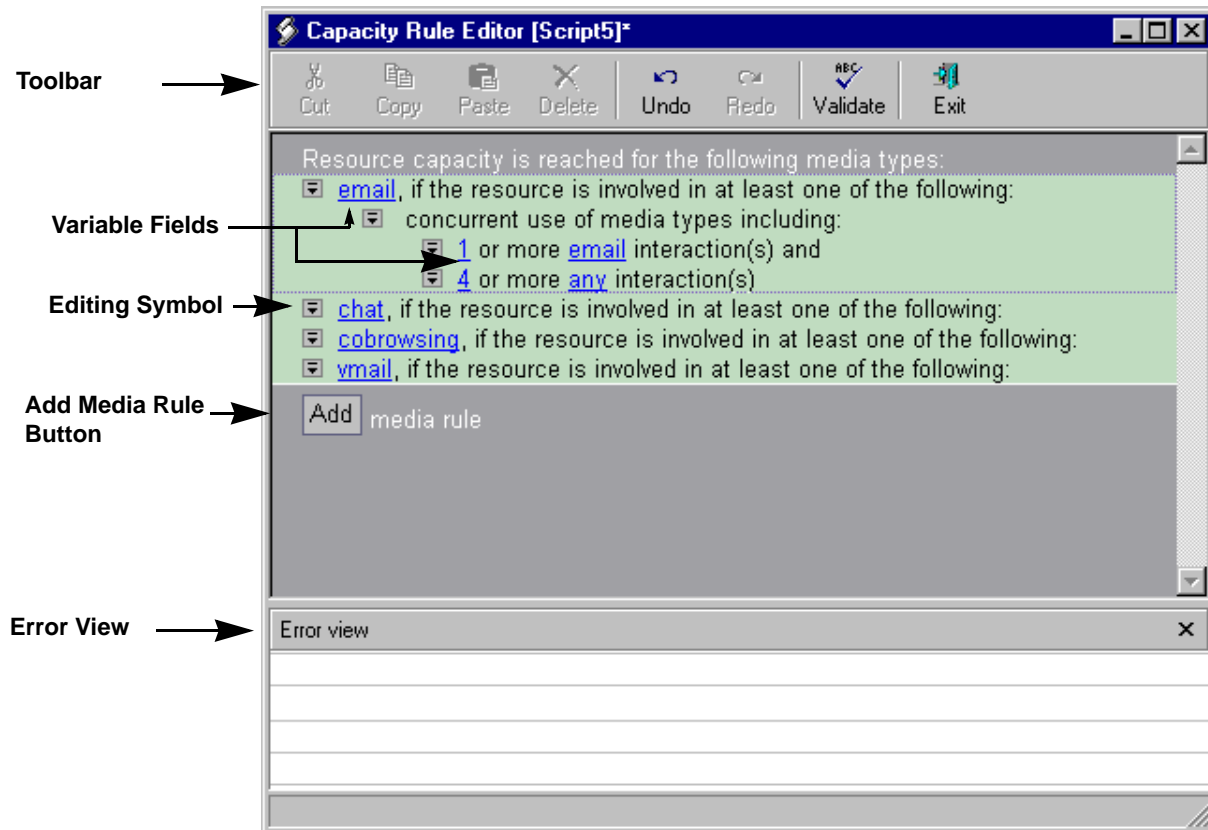


Figure 8: Capacity Rule Editor

## CRE Toolbar Buttons

Table 1 explains the functions of the CRE toolbar buttons.

**Table 1: Toolbar Buttons of the Capacity Rule Editor**


Button Name	Button Function
Cut	Copies the selected media rule to the clipboard and removes it from the equation. This button is disabled, if you have not selected a media rule.
Copy	Copies the selected media rule to the clipboard. This button is disabled if you have not selected a media rule
Paste	Appends the media rule that is stored in clipboard to the end of the media-rule list. This button is disabled, if the clipboard contains no media rule.
Delete	Deletes the selected media rule
Undo	Undoes the last command that was executed—only one level of undo
Redo	Re-executes the last Undo command.

**Table 1: Toolbar Buttons of the Capacity Rule Editor (Continued)**

Button Name	Button Function
Validate	Checks the rule for completeness. Exiting the Capacity Rule Editor in and of itself does not validate the capacity rule. To obtain validation results, you must explicitly validate the rule by clicking this button.
Exit	Prompts you to save or abandon your work and exits CRE. You can click the Windows control close button to perform the same action. There is no explicit save command. Any changes that are made to the script are temporary until they are saved.

## Hyper-Elements Within the Main Window

The Capacity Rule Editor is not a text editor. You can perform only a limited number of operations within the main window using three hyper-elements:

- The editing symbol  that precedes each line
- The blue-underlined variable fields
- The Add button

Refer to Figure 8 on [page 30](#).

### Editing Symbol

You can click the editing symbol to display a context menu that has one or two commands:

- **Add Condition**—Adds a new dependent condition immediately below the specific command icon that is clicked.

---

**Note:** The Resource Capacity Wizard automatically creates media rules for each media type that is selected in the **Media Types** dialog box. (Refer to Figure 7 on [page 29](#).) If you subsequently delete a media rule, you can click the **Add Condition** button to restore it.

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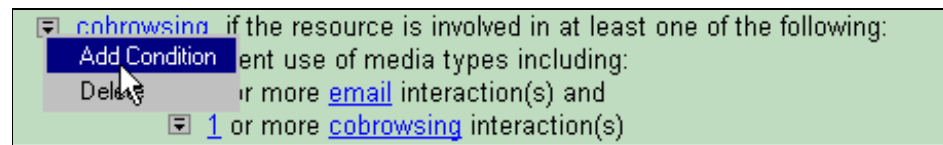
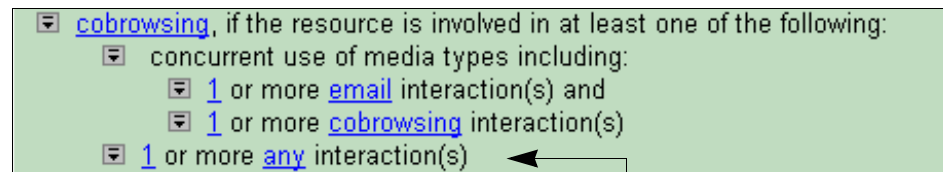
- **Delete**—Removes the condition that immediately follows (or that is on the same line as) the command icon that is clicked.

[Figure 9](#), for example, shows a snippet of a capacity rule both before and after the addition of a new condition to a media rule. In this figure, you could also add dependent conditions under the following level:

concurrent use of media types including:

However, you could not add dependent conditions under the following level:

1 or more email interaction(s) and

**Before****After**

← New dependent condition added to cobrowsing media rule

**Figure 9: Adding a Condition to Your Media Rule**

Note: Cobrowsing is a secondary media type that an agent initiates after a voice or chat session begins with a customer. Cobrowsing involves no routing of interactions and Interaction Server does not inform Stat Server that a cobrowsing session has begun. Although you can define a cobrowsing media rule within a capacity rule, Stat Server does not know the number of cobrowsing sessions in which a resource is involved—let alone whether any cobrowsing session is active at the resource. Its use in [Figure 9](#) is for illustration purposes only.

## Variable Fields


You can change the value that are shown in any of the blue-underlined fields by clicking the field and selecting an appropriate value from the context menu that appears. For number fields, select **More** from the context menu to specify a value that is larger than 5. In the fields where you specify media types, the Capacity Rule Editor only displays values in the context menu for the media types that you selected in the **Media Types** screen when you created the script object. Revisit [Step 5](#) on [page 21](#) to add or remove media types from the context menu.

## Add Button

Click the **Add** button above the **Error View** (see [Figure 8](#)) to add a new media rule to the capacity rule. This button is activated only if the number of media in the **Media Types** screen exceeds the number of media rules; otherwise, it is disabled. This button is useful if, for instance, you delete a media rule and later



decide to restore it to your capacity rule definition. The Capacity Rule Editor adds the following line under the last existing media rule:

 [<unknown>](#), if the resource is involved in at least one of the following:

You must both define the media type and add appropriate conditions under this line to complete the media rule's definition. The Editor provides no default definition for the media rules that you add.

## Error View

When you validate your capacity rule, the Capacity Rule Editor displays validation results in its Error View pane. (Refer to Figure 8 on [page 30](#).) You can click a particular error from this pane to select and highlight the erroneous media rule. You can save your capacity rule and exit the Editor, whether or not your script contains errors. However, if you invoked the Editor via the Resource Capacity Wizard, you will not be able to close the Wizard by clicking Finish in the Summary page. It is this closing action that permanently saves and writes the script to the Configuration Layer. If you attempt to apply an invalid capacity rule within your environment, Stat Server ignores it.

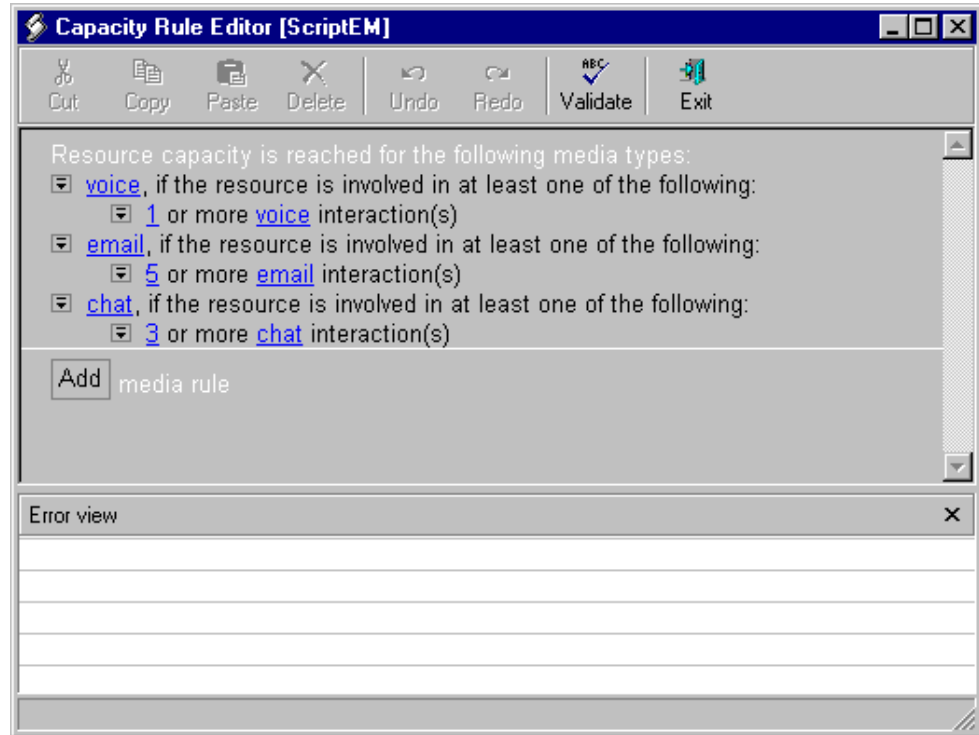
The Capacity Rule Editor does not validate whether media types still exist in Configuration Server. If a media type was subsequently deleted from Configuration Server after it was referenced in a media rule of a saved capacity rule, the capacity rule will pass the validity test, assuming that all other syntax is correct. Upon determining capacity, however, Stat Server will ignore the media rule if its media type no longer exists. Refer to [Chapter 7](#) for other troubleshooting tips for operating the Capacity Rule Editor.

---

## Creating a Capacity Rule from Scratch

When you create a capacity rule from scratch and invoke the Capacity Rule Editor, the Editor opens with a simple definition for each media type you selected in the Media Types screen. (Refer to Step [Step 5a](#) on [page 21](#).) The Resource Capacity Wizard populates the numeric fields with the maximum values that you specified in Step [Step 5b](#).

The example that is shown in [Figure 10](#), is the default display when you select the options that are shown in [Figure 4](#) on [page 22](#).



**Figure 10: Generated Capacity Rule Based on Simple Media Rules**

To refine media-type definitions, perform the following steps:

1. Click the editing symbol and select **Add Condition** from the context menu that appears to define the media rule.
2. Customize your media rule by adding as many subconditions as necessary to suit your environment and indicating the number and type of permissible concurrent interactions.
3. Click **Validate** to check the rule's syntax and to correct any problems noted in the **Error View**.
4. Click **Exit** to save the rule and exit the Capacity Rule Editor.

If you delete a media rule and then want to restore it:

1. Click the **Add** button.
2. Click **<unknown>** and select an appropriate media type from the context menu that appears.
3. Add the appropriate conditions to the media rule.

---

**Note:** The Capacity Rule Editor displays values only for the media types that you previously selected in the **Media Types** screen when you created the script object.

---

4. Add and define additional media rules by repeating these steps.

---

**Warning!** You must specify every applicable media type in your capacity rule. If, for example, you miss defining a chat media rule in your Multimedia environment (which employs chat sessions), application of the capacity rule to Person, Place, and Tenant objects will prevent Genesys software from routing a customer-requested chat session to an available agent even if s/he is currently handling no interactions at all. Furthermore, you should be aware of the ramifications of agents checking out a limited number of chat licenses, in this scenario and yet not being enabled to receive chat interactions.

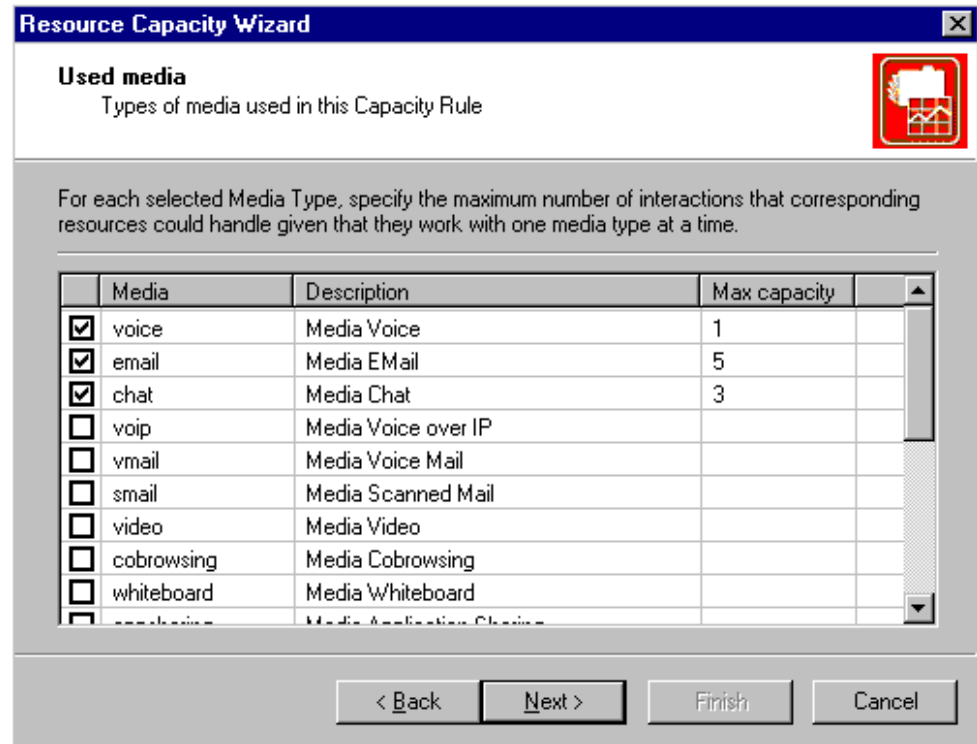
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## Creating a Capacity Rule from an Existing Rule

When you create a new capacity rule from an existing rule, the Resource Capacity Wizard displays the Used Media screen instead of the Media Types screen. [Figure 11](#) displays the capacity rule that was created earlier (on [page 22](#)) as the existing capacity rule.

The capacity rule definition is copied from the existing rule. From the Used Media screen, you can add media types to your capacity rule, remove them, or change capacity values in the Max Capacity field just as if you were creating a media rule from scratch. The changes that you introduce have no impact on the original, copied-from capacity rule; at this screen, you are modifying only the new capacity rule that you are creating. Click Next to arrive at the Important Information screen, where you can invoke the Capacity Rule Editor. The Editor opens with the same media-type definitions that are provided in the existing capacity rule. (Refer to [Figure 10](#) on [page 34](#)).



**Figure 11: Used Media Screen of Resource Capacity Wizard**

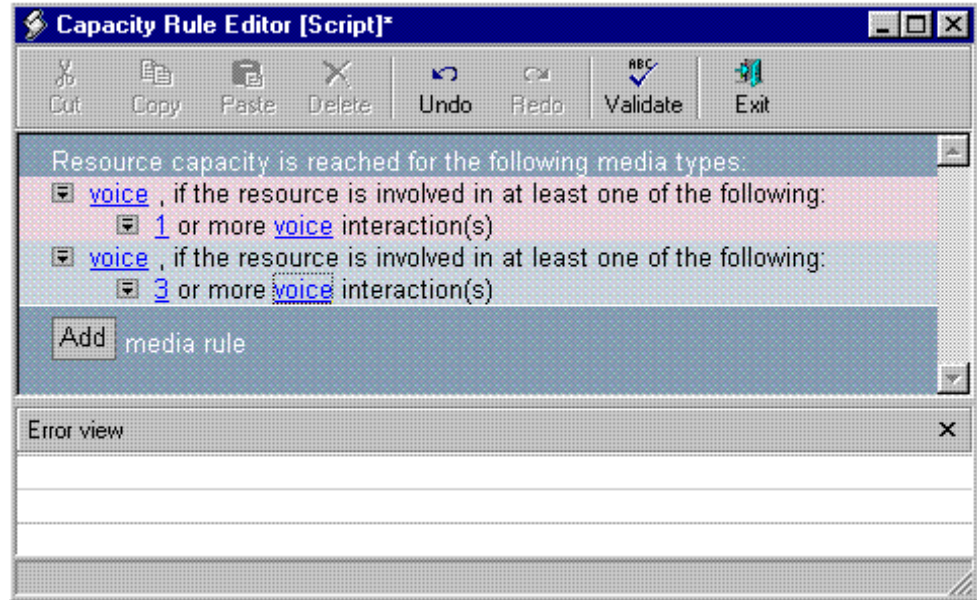
You can refine the media-type definitions of your new capacity rule by following the previous steps (Steps [Step 1](#) through [Step 4](#) on [page 34](#)).

---

## When Internal Logic Supersedes

Under some conditions, when the logic behind the media rules that you define conflict, the system's logic might interpret your capacity rule differently than what you intended. This occurs, for example, when you have specified redundant information in one or more media rules, as shown in [Figure 12](#).

Under most circumstances, the Capacity Rule Editor displays an appropriate warning message in the Error View. This message identifies the problem and provides a suggestion for how you can remedy it.



**Figure 12: Media Rule Defined with Redundant Information**

Internal logic selects the more restrictive clause and interprets this particular construction as having reached capacity if one or more voice interactions are currently in progress for a particular resource.

There are other similar misconstructions about which the Capacity Rule Editor will inform you in the Error View if you validate your capacity rule before you exit the Editor. Refer to [Chapter 7](#), for more information.





## Chapter

# 4

## Assigning Capacity Rules to Resources

This chapter describes how to assign capacity rules to Person, Place, or Tenant objects within Configuration Manager. It contains the following sections:

- [Assigning Capacity Rules to Agents, page 39](#)
- [Assigning Capacity Rules to Places, page 40](#)
- [Assigning Capacity Rules to Tenants, page 41](#)
- [Assigning Capacity Rules by Using the MCR Wizard, page 42](#)

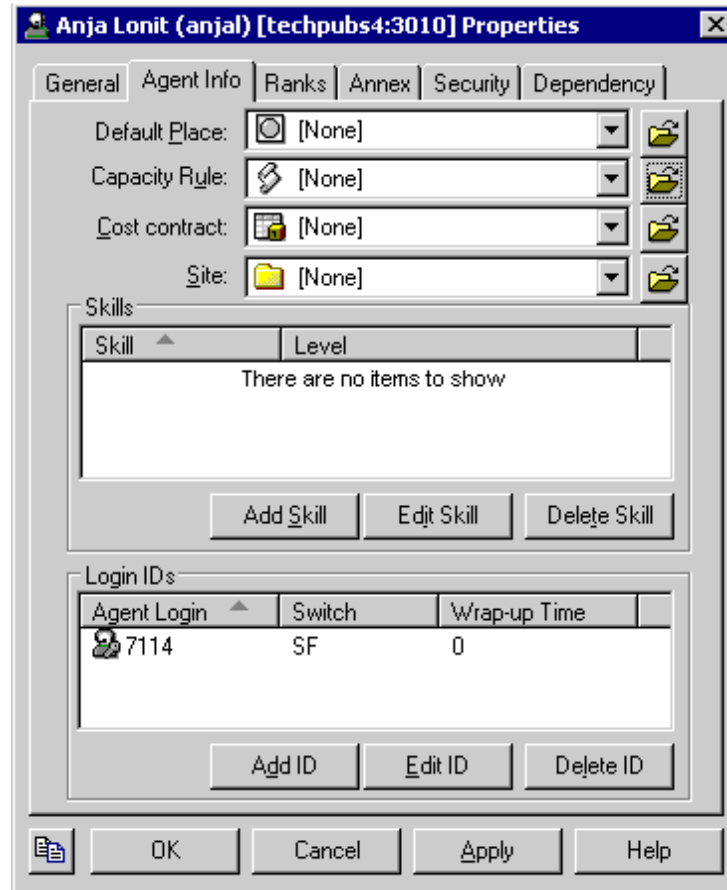
You cannot assign more than one capacity rule to a particular object. Also, at this time, there is no mechanism (such as a scheduler) for automatically changing capacity-rule assignments.

---

## Assigning Capacity Rules to Agents

You assign capacity rules to individual Person objects in the Configuration Layer. The router uses each of those rules to determine agent availability for assigning interactions. You use Configuration Manager to effect capacity-rule assignments.

1. In Configuration Manager, open the Properties dialog box of a Person object. [Figure 13](#), for example, shows the Properties dialog box for the Anja Lonit agent.



**Figure 13: Assigning a Capacity Rule to a Person Within Object Properties**

2. On the Agent Info tab, select the appropriate capacity rule from the Capacity Rule list box or click the Browse icon to search for and select a capacity rule from the Browse dialog box that opens.
3. Click OK to save and close the Properties dialog box of your object.

The valid capacity rules that you assign to agents in your contact-center environment take precedence over capacity-rule assignments to the places and tenants to which the agent belongs.

---

## Assigning Capacity Rules to Places

You can assign capacity rules to Place objects, as well as to Person objects, in the Configuration Layer. However, such an assignment applies to the logged-in entities (such as agents) that are attributed to that Place, and not to the Place itself. In other words, by assigning a particular capacity rule to a Place, you are not defining capacity for the number and mix of interactions that place can handle. Instead, you are defining the capacity for the number and mix of interactions that each entity (named or anonymous) that is logged in to that Place can handle.



Indeed, a quick way to assign a specific capacity rule to all agents who are logged in to a particular `Place` is to assign that capacity rule to that `Place`:

1. In Configuration Manager, open the `Properties` dialog box of a `Place` object.
2. On the `General` tab, select the appropriate capacity rule from the `Capacity Rule` list box or click the `Browse` icon to search for and select a capacity rule from the `Browse` dialog box that opens.
3. Click `OK` to save and close the `Properties` dialog box of your `Place` object.

The valid capacity rules that you assign to places in your contact-center environment take precedence over capacity-rule assignments to the `Tenant` to which the `Place` is a part. However, the assignments do not preempt valid assignments that are made directly to `Person` objects that might belong to the `Place`. This means that if capacity-rule assignments are made to both an agent and his corresponding place of that agent, Stat Server uses the rule that is assigned to the agent—if it is valid—over the capacity rule that is assigned to his place.

---

Note: At this time, you cannot assign capacity rules to agent or place groups.

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## Assigning Capacity Rules to Tenants

You can also assign capacity rules to `Tenant` objects, as well as to `Place` and `Person` objects, in the Configuration Layer. Such an assignment applies to all of the logged-in entities (such as agents) that belong to the tenant—not to the tenant itself—provided that you have assigned no superseding rule to the place or agent. By assigning a particular capacity rule to a tenant, you are defining the capacity for the number and mix of interactions that each entity (named or anonymous) that belongs to that tenant can handle. In no manner does this affect the number of interactions that can be processed within the tenant.

1. In Configuration Manager, open the `Properties` dialog box of a `Tenant` folder.
2. On the `General` tab, select the appropriate capacity rule from the `Default Capacity Rule` list box or click the `Browse` icon to search for and select a capacity rule from the `Browse` dialog box that opens.
3. Click `OK` to save and close the `Properties` dialog box of your `Tenant` folder.

The capacity rules that you assign to tenants do not preempt the assignments that are made directly to `Person` or `Place` objects that might belong to that tenant. If capacity-rule assignments are made to an agent, the corresponding place of the agent, and the corresponding tenant of that agent, Stat Server uses the rule that is assigned to the agent—if it is valid—over the capacity rule that is assigned to his place or to his tenant. If the capacity rule assigned to the agent is invalid, Stat Server considers the place-assigned capacity rule before it considers the rule that is assigned to the tenant.

# Assigning Capacity Rules by Using the MCR Wizard

Toward the end of the Multi-Channel Routing Solution (MCR) Wizard are two screens for deploying Genesys-provided capacity rules. From these screens, you can deploy three prebuilt capacity rules within your environment and assign one of them to your Tenant object.

Note: At this time, you can use the MCR Wizard to assign capacity rules to Tenant objects only.

1. In the Resource Capacity Rules Deployment screen (shown in Figure 14), specify the folder in Configuration Manager that is to store the Genesys-provided rules. The Scripts folder is the default location. Click the Browse icon, if you want to specify a different folder. Then, click Next.

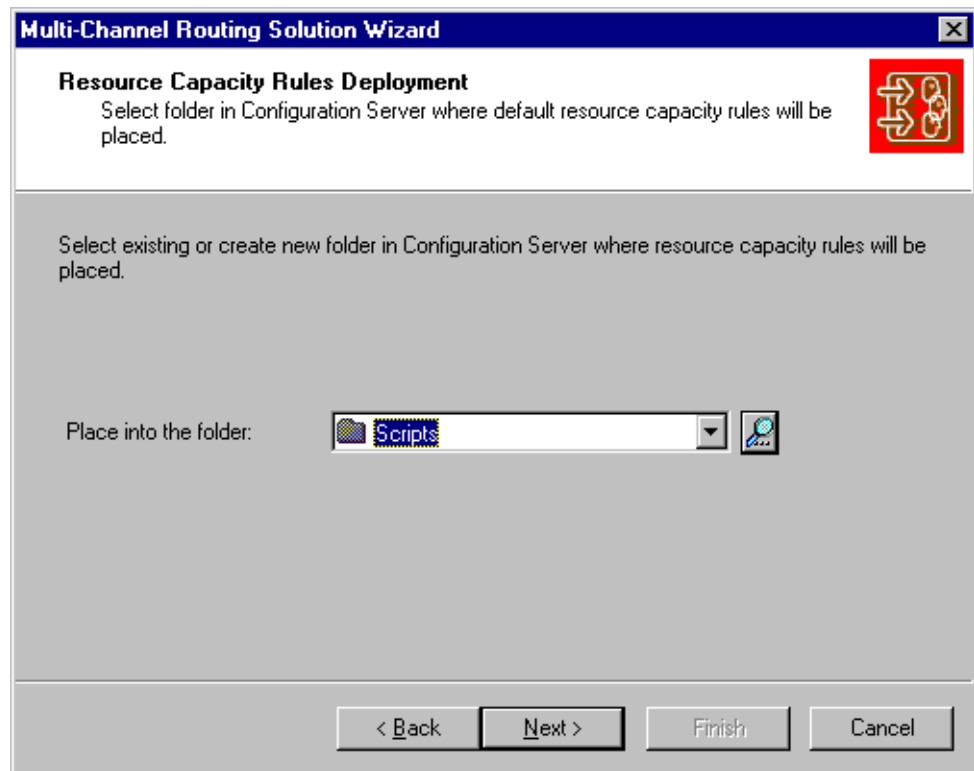


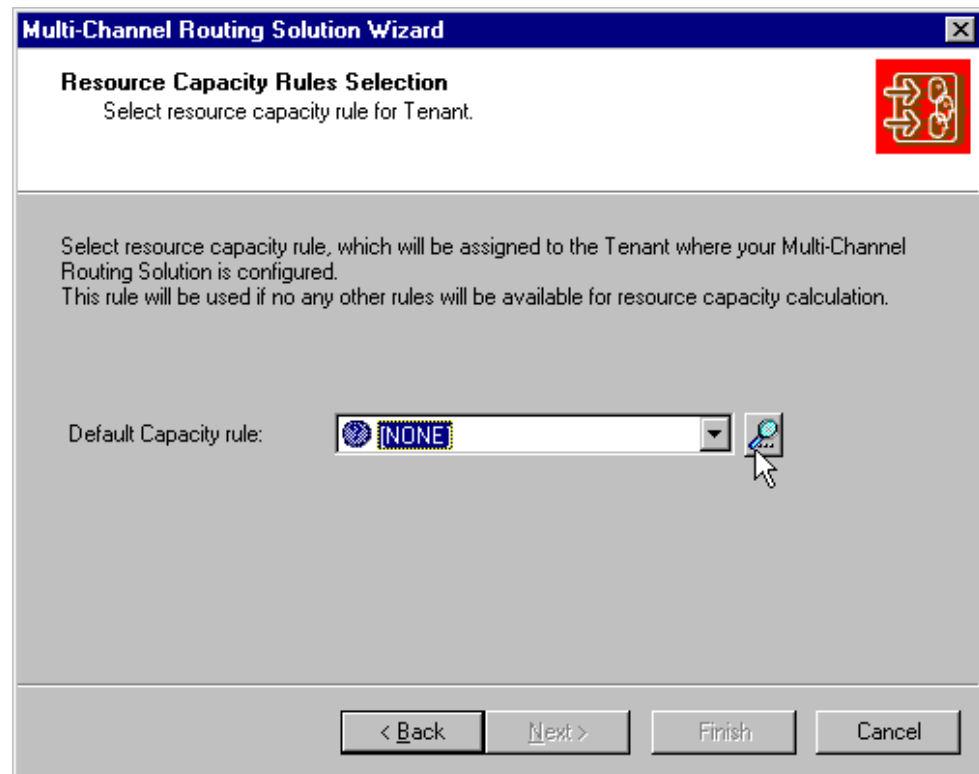
Figure 14: Deploying the Genesys-Provided Capacity Rules

The Wizard copies the three Genesys-provided capacity rules for the Multimedia solution to the folder that you specify:

- Default\_One\_interaction\_of\_any\_type\_only
- Default\_One\_media\_allows\_more\_than\_one\_interaction
- Default\_Voice\_interactions\_always\_allowed

See [Chapter 5](#) for more information about the definition of these rules.

2. In the Resource Capacity Rules Selection screen, from the drop-down list box, choose a default capacity rule to apply to your tenant. Alternatively, you can click the Browse icon, as shown in [Figure 15](#), to select a capacity rule from the Browse for Script dialog box. Then, click Next.



**Figure 15: MCR Wizard: Applying a Default Capacity Rule to the Tenant**

All agents who belong to the tenant automatically inherit the capacity rule that you assigned to the tenant. If you want to assign a different capacity rule to an individual Person or Place, refer to the first two sections of this chapter.

3. Complete the MCR Wizard.





## Chapter

# 5

## Genesys-Provided Capacity Rules

With the Multimedia 8.x release, Genesys supplies three out-of-box capacity rules for you to assign to Person, Place, or Tenant objects in Configuration Server. These rules are stored in the tenant's Solutions folder of Configuration Manager when deployed using the Multimedia Wizard. If you do not assign any capacity rule to these objects, then Stat Server's inherent Default capacity rule applies.

This chapter describes the Default and the three Genesys-provided rules:

- [Default Capacity Rule, page 45](#)
- [Default\\_One\\_interaction\\_of\\_any\\_type\\_only Capacity Rule, page 46](#)
- [Default\\_One\\_media\\_allows\\_more\\_than\\_one\\_interaction Capacity Rule, page 47](#)
- [Default\\_Voice\\_interactions\\_always\\_allowed Capacity Rule, page 48](#)

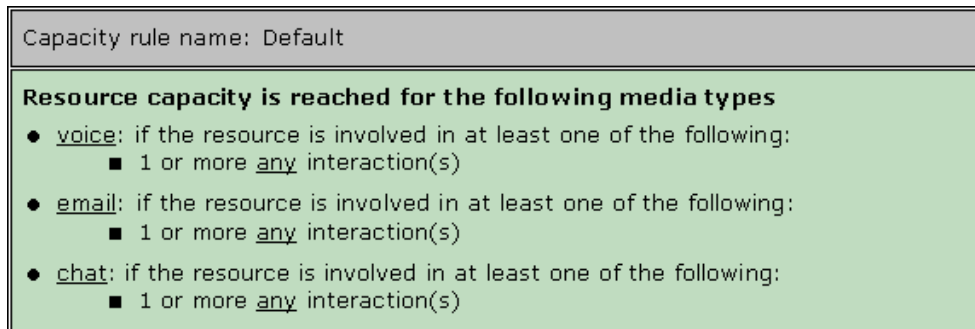
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### Default Capacity Rule

Stat Server uses the Default capacity rule when no capacity rule has been assigned directly or indirectly to an agent. This may occur when no capacity rule has been associated with the corresponding Person, Place, and Tenant objects in the Configuration Layer. This default rule is not accessible within the Configuration Layer and is uneditable as it is embedded within Stat Server logic.

The Default capacity rule allows an agent to receive one interaction each of any media type configured within the Configuration Layer. If, for example, Configuration Manager has the voice, email, and chat media types, then each agent can receive one voice interaction or one e-mail interaction or one chat interaction if he or she is not already working on an interaction of any type. If you configure an additional media type at a later time—fax for example—then

the Default capacity rule automatically allows an agent to receive one fax interaction or one voice interaction or one e-mail interaction or one chat interaction before the software determines that capacity is reached. Likewise, if you remove a configured media type from the Configuration Layer, the Default capacity rule applies and Stat Server no longer sends interactions of that media type to that agent. Figure 16 illustrates how this capacity rule is defined given three media types.



**Figure 16: Default Capacity Rule**

To define it another way, the rule states that if an agent has at least one interaction that he or she is already working on, a new inbound interaction of that type will not be distributed to him/her.

---

## Default\_One\_interaction\_of\_any\_type\_only Capacity Rule

This capacity rule states that new e-mail, chat, or voice interactions cannot be distributed to an agent if he or she is already participating in any other interaction. This differs from the Default capacity rule just described in that three media rules for these media types are the only three comprising the capacity rule; whereas, the Default capacity rule will automatically formulate a media rule for each configured media type.

Figure 17 shows the definition of the Default\_One\_interaction\_of\_any\_type\_only capacity rule.

Capacity rule: Default_One_interaction_of_any_type_only
<p><b>Resource capacity is reached for the following media types</b></p> <ul style="list-style-type: none"> <li>● <u>voice</u>: if the resource is involved in at least one of the following: <ul style="list-style-type: none"> <li>■ 1 or more <u>any</u> interaction(s)</li> </ul> </li> <li>● <u>email</u>: if the resource is involved in at least one of the following: <ul style="list-style-type: none"> <li>■ 1 or more <u>any</u> interaction(s)</li> </ul> </li> <li>● <u>chat</u>: if the resource is involved in at least one of the following: <ul style="list-style-type: none"> <li>■ 1 or more <u>any</u> interaction(s)</li> </ul> </li> </ul>

**Figure 17: Default\_One\_interaction\_of\_any\_type\_only Capacity Rule**

---

Note: This rule does not prevent an agent from participating in more than one interaction. The rule merely prevents the routing of new interactions to the agent under the stated circumstances.

---

Participation in an interaction includes those instances where the agent initiates customer contact, accepts an interaction that is transferred to him/her, and is involved in interactions other than voice, e-mail, and chat.

---

## Default\_One\_media\_allows\_more\_than\_one\_interaction Capacity Rule

This capacity rule prevents an agent from simultaneously handling more than one interaction of each media type, except e-mail, for which the rule allows for no more than five simultaneous interactions. Maximum capacity using this rule is one voice, five e-mail, and one chat interactions. [Figure 18](#) shows how this capacity rule is defined.

Capacity rule: Default_One_media_allows_more_than_one_interaction
<p><b>Resource capacity is reached for the following media types</b></p> <ul style="list-style-type: none"> <li>● <u>voice</u>: if the resource is involved in at least one of the following: <ul style="list-style-type: none"> <li>■ 1 or more <u>voice</u> interaction(s)</li> </ul> </li> <li>● <u>email</u>: if the resource is involved in at least one of the following: <ul style="list-style-type: none"> <li>■ 5 or more <u>email</u> interaction(s)</li> </ul> </li> <li>● <u>chat</u>: if the resource is involved in at least one of the following: <ul style="list-style-type: none"> <li>■ 1 or more <u>chat</u> interaction(s)</li> </ul> </li> </ul>

**Figure 18: Default\_One\_media\_allows\_more\_than\_one\_interaction Capacity Rule**

---

## Default\_Voice\_interactions\_always\_allowed Capacity Rule

This capacity rule favors voice interactions over other interaction types in allowing agents to handle one voice interaction plus one interaction of any other type. Maximum capacity is reached when the agent participates in any of the following interactions:

- One voice interaction
- One voice and one chat interactions
- One voice and one e-mail interactions

Figure 19 shows how this capacity rule is defined.

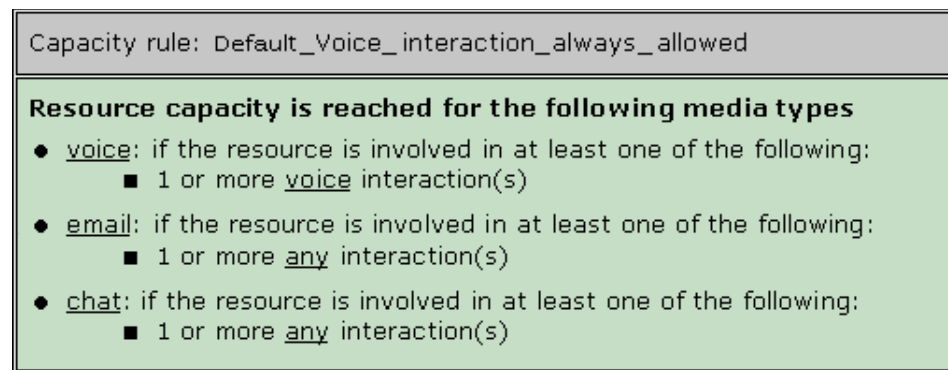


Figure 19: Default\_Voice\_interactions\_always\_allowed Capacity Rule





Chapter

# 6

## Capacity Snapshot

Stat Server’s interpretation of the capacity rules you define are manifested in *capacity snapshots* which Stat Server logs whenever certain events take place, including:

- Any time a place is added to your configuration.
- When the state of readiness changes at a particular place for a particular media from NotReady to Ready or from Ready to NotReady.
- When assigned capacity rules are created, altered, or deleted.
- As the number of concurrent or assignable interactions for each media type changes at a particular place.

This capacity snapshot appears in the Stat Server log following this general format:

```
<date> <time> <loglevel>: Capacity snapshot for place '<placeID>' ('<tenant>'), agent
'<agentID>' ('<tenant>') (CR='<CapacityRuleName>')
```

```
media_state  current_number  max_number  routable
-----
[ S          N1          N2          N3 ] <-- <mediatype>
```

where [ S N<sub>1</sub> N<sub>2</sub> N<sub>3</sub> ] is a *capacity vector* relating to one particular media type. The four dimensions of this vector represent:

- The state of readiness, S, of a particular media at a particular place—either NR or R for NotReady and Ready respectively.
- The number of interactions, N<sub>1</sub>, currently in progress at a specific target for the particular media.
- The maximum number of interactions, N<sub>2</sub>, of the particular media that can be routed to a specific target according to the current capacity rule given the condition that the number of interactions on each of other medias remains unchanged. This calculation does not take into account the physical capacity of the multimedia DN, but rather this value corresponds to the value defined in the capacity rule for the person, place, or tenant resource.

- The number of additional interactions,  $N_3$ , of a particular media that can be routed without violating the capacity rule given the condition that the number of interactions on each of the other medias remains unchanged.

## Media State

The Ready/NotReady media state recorded in the capacity vector differs from Ready/NotReady status of Place objects, which is documented in the *Stat Server User's Guide*. The Ready media state, as specified within a capacity vector, signifies that the Genesys router can route an interaction of a particular media type to a DN at a Genesys Place, whereas the NotReady media state signifies that the Genesys router cannot route the interaction.

Stat Server derives a place's media state from the independent media states of all of the DNs located at that place. This DN media state can take on different interpretations depending on the DN type and switch type:

- The media state on a voice treatment port (VTP) DN is considered to be Ready if and only if the status of the VTP DN is WaitForNextCall.
- A paired Position-Extension Meridian DN is Ready if any of the following apply:
  - The status of the Extension DN is WaitForNextCall.
  - An agent is logged in to the Position DN.
  - The Position DN holds any status other than AfterCallWork or NotReadyForNextCall.

---

Note: The media state of a DN configured on a Meridian 1 or Meridian Link Symposium switch takes into account the pairing of Position and Extension DNs on the Meridian switch. For purposes of determining capacity, Stat Server considers each pairing of Position and Extension DNs as one DN.

---

- The media state for most other DN types is Ready if and only if:
  - An agent is logged in to the DN and
  - The DN's status is WaitForNextCall.

A Place's media state, then, is defined to be Ready if the media state of at least one DN (or one pairing of Position-Extension Meridian DNs) at that Place is Ready. A Place's media state for other-than-voice media is equivalent to the Place's status.

## Capacity Vector Examples

The [ NR 0 1 0 ] capacity vector for target PlaceX and Voice media type signifies that PlaceX is in NotReady state, no voice interactions are currently registered at PlaceX, and that Stat Server can assign no interactions to PlaceX. From this information, you can surmise that Stat Server has not yet connected

to T-Server and because of this, it is not possible to know whether or not a voice interaction is currently underway.

Capacity vector [ R 1 2 1 ] at P laceY for emedia type signifies that P laceY is in Ready state, one e-mail interaction is currently underway at P laceY, and one additional e-mail interaction can be routed to P laceY .

---

Note:  $N_1$  may exceed  $N_2$  in situations where the agents themselves initiate interactions.

---

Review your own Stat Server log for additional capacity vector examples to better understand the mechanics of how Stat Server applies your capacity rules to resources.





## Chapter

# 7

## Troubleshooting Capacity Rules

When you validate a capacity rule, you might encounter errors or warnings on the Error View pane of the Capacity Rule Editor (CRE) that require resolution before the rule can be used. You might also encounter messages that indicate capacity rule–related problems in your Stat Server log or the Message Server if you have set up alarm conditions.

This chapter lists some common errors in configuration and describes how to resolve them. It contains the following sections:

- [No Media Rules, page 53](#)
- [Missing Media Rule, page 54](#)
- [Cannot Make Any Changes Within CRE, page 55](#)
- [Rule Changes Are Not Saved, page 56](#)
- [Infinite Capacity, page 56](#)
- [No Conditions, page 58](#)
- [Undefined Media, page 58](#)
- [Duplicated Media Rule, page 59](#)
- [Media Rule Too Complex, page 60](#)
- [How Stat Server Handles Invalid Rules, page 61](#)

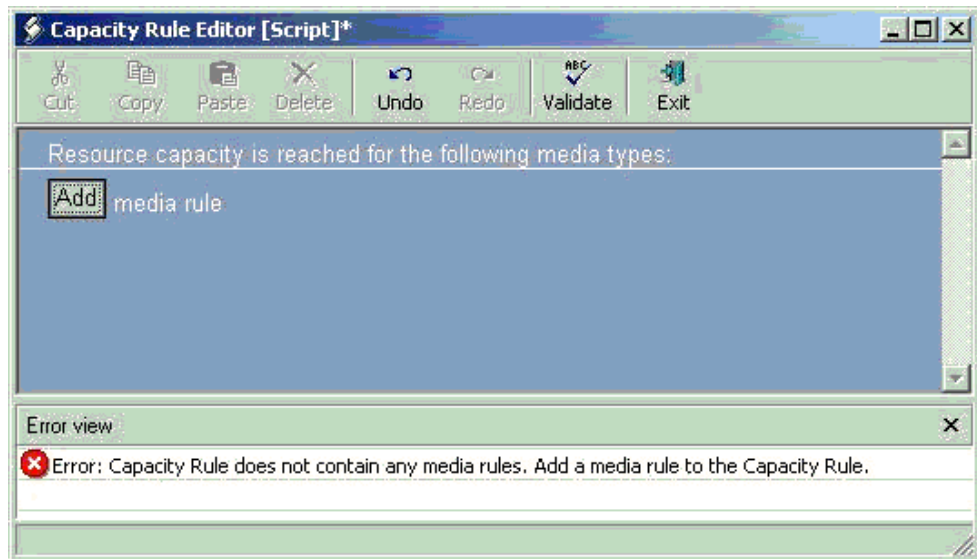
---

### No Media Rules

The Error View of the Capacity Rule Editor displays the following message when you attempt to save or validate a capacity rule while it is empty:

```
Error: Capacity Rule does not contain any media rules. Add a media rule to the Capacity Rule.
```

The Capacity Rule Editor does not allow you to save empty capacity rules. Each capacity rule must contain at least one media rule, which itself specifies at least one condition. [Figure 20](#) illustrates an empty capacity rule.



**Figure 20: Empty Capacity Rule**

To correct this error:

1. Add a media rule to a capacity rule by clicking the Add button. CRE inserts a media rule that is labeled <unknown>.
2. Click the editing symbol preceding <unknown> and select Add Condition from the context menu that appears to define the media rule.
3. Add and define additional conditions and/or media rules as necessary.
4. Validate the rule.

## Missing Media Rule

The Error View displays the following message when you attempt to validate a capacity rule and the Capacity Rule Editor determines that a media rule is missing:

Error: Media X is used in media rule for media Y but Capacity Rule does not contain a media rule for media X. Create a media rule for X.

The capacity rule must contain a dedicated media rule for each media type that is used in the capacity rule. [Figure 21](#) illustrates a capacity rule that limits vmail interactions when a resource is involved in one or more chat interactions; however, the capacity rule fails to define a chat media rule.

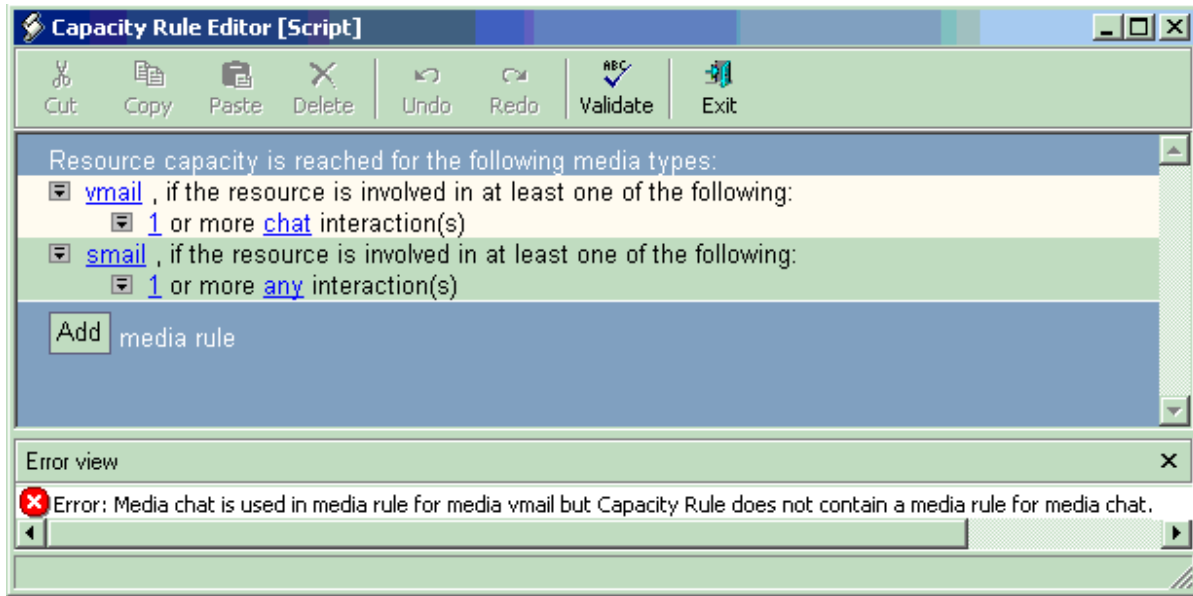


Figure 21: Example of Missing Media Rule

1. To correct this error, either click the Add button to add a media rule or define the media rule for the media type that is missing.
2. Repeat this action for each media type that is used in the capacity rule and is not already defined.
3. Validate the rule.

Alternatively, you can remove any condition from the existing media rules for which no dedicated media rule exists.

---

## Cannot Make Any Changes Within CRE

Upon first use of Internet Explorer (IE), the configuration of your host's IE application might block your ability to edit a capacity rule by using the Capacity Rule Editor. If the dialog box in [Figure 22](#) appears, click Add... to add the security\_CfgWzLoader executable to the listing of trusted sites. Then, close and reopen CRE to edit the rule.



Figure 22: Trusted Site

---

## Rule Changes Are Not Saved

You can view *and seemingly edit* capacity rule definitions from the Annex tab of a capacity rule Application object in Configuration Manager. The `_CRWizardMediaCapacityList_` section displays the selected media and their assigned values for the capacity rule. Configuration Manager also allows you to change values that are visible from this tab; however, Stat Server does not read information from this location when it determines capacity. To save changes to capacity rule definitions, you must execute the changes within the Resource Capacity Wizard or within the Capacity Rule Editor, which you can access from the Wizard. Invoking this Wizard is described on [page 20](#).

---

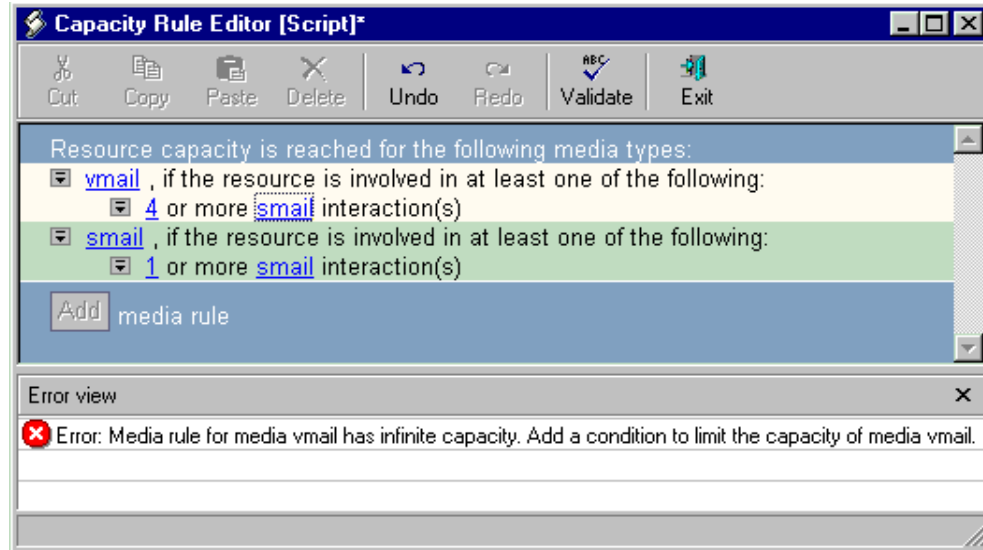
## Infinite Capacity

The Error View displays the following message when you attempt to validate a capacity rule and the Capacity Rule Editor detects media rules that have potentially infinite capacity:

Error: Media rule for media X has infinite capacity. Add a condition to limit the capacity of media X.

Each media rule must have a restrictive condition for its media type. [Figure 23](#), for example, illustrates an infinite-capacity situation. There is no limit to the number of `vmail` interactions that could be assigned to a resource when the number of scanned mail (`smail`) interactions is fewer than four.



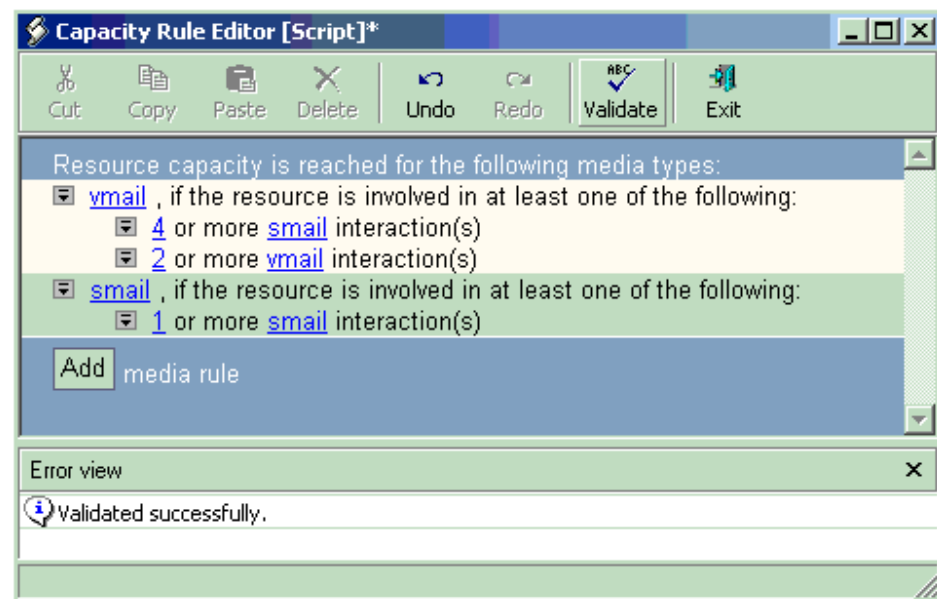


**Figure 23: Example Illustrating Infinite Capacity**

To correct this error:

1. Click the editing symbol that precedes the erroneous media rule.
2. Select **Add Condition** from the context menu that appears.
3. Define the condition to address interactions of the media rule's own type (or any type).
4. Validate the rule.

Figure 24, for example, shows that a condition that addresses `vmail` interactions has been added to the `vmail` media rule.



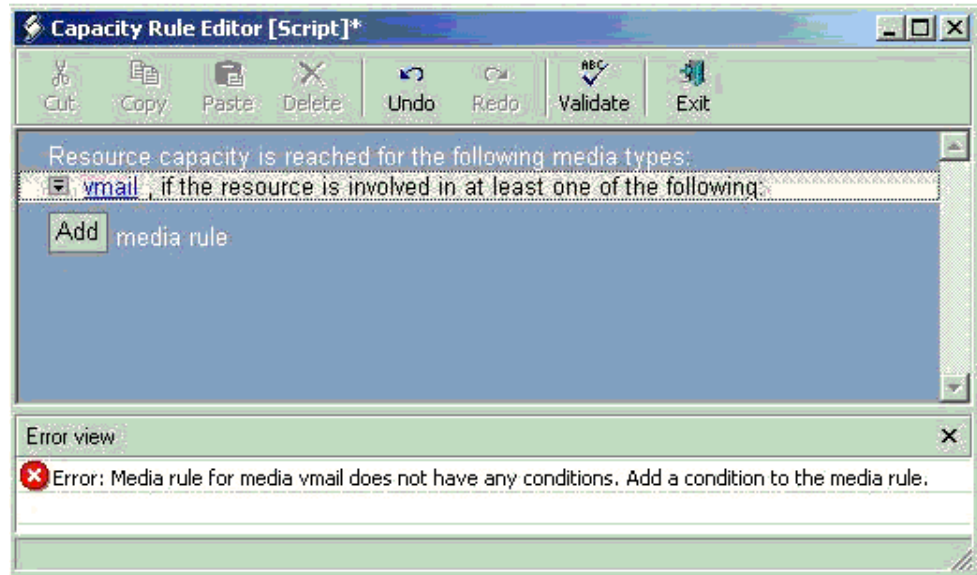
**Figure 24: Infinite Capacity Resolved**

## No Conditions

The Error View displays the following message when you validate a capacity rule and no conditions have been created for a media rule:

Error: Media rule for media X does not have any conditions. Add a condition to the media rule.

Each media rule must have at least one condition. [Figure 25](#) illustrates a capacity rule with one media rule that specifies no conditions.



**Figure 25: Example of a Media Rule Without Conditions**

To correct this error:

1. Click the editing symbol preceding the erroneous media rule.
2. Select **Add Condition** from the context menu that appears.
3. Define the condition.
4. Repeat [Steps 2](#) and [3](#) for the number of conditions you want to ascribe.
5. Validate the rule.

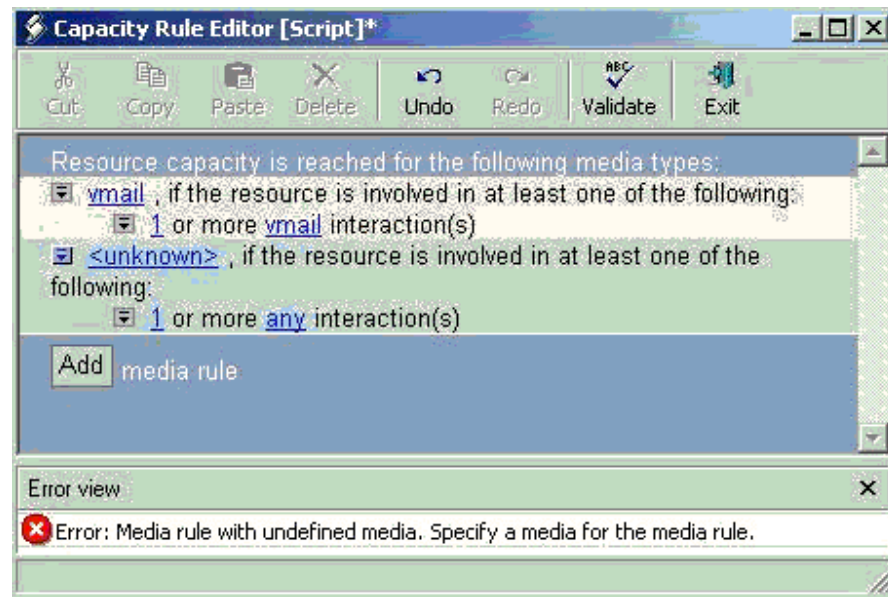
## Undefined Media

The Error View displays the following message when you attempt to validate a capacity rule that contains an undefined media rule:

Error: Media rule with undefined media. Specify a media for the media rule.

When you click the **Add** button, CRE inserts a temporary structure which it names <unknown>. The unknown media does not hold any significance to router

and you should change this to a meaningful media, such as voip, chat, or email before leaving the Editor. Figure 26 illustrates a capacity rule that has an unknown media type.



**Figure 26: Example of Media Rule with Unspecified Media**

To correct this error:

1. Click the <unknown> link, and select an appropriate media from the pop-up that appears.
2. Make sure that the media rule includes a restrictive condition that limits the number of interactions of the media's type.
3. Validate the rule.

## Duplicated Media Rule

The Error View displays the following message when you attempt to validate a capacity rule that contains two or more media rules of the same type:

Error: Media rule duplicated. Remove duplicate media rule.

Capacity rules should contain a single media rule only for each media type.

Figure 27 illustrates this error in defining two media rules for vmail.



**Figure 27: Example of Two Identical Media Rules Present for One Media Type**

To correct this error, perform the following:

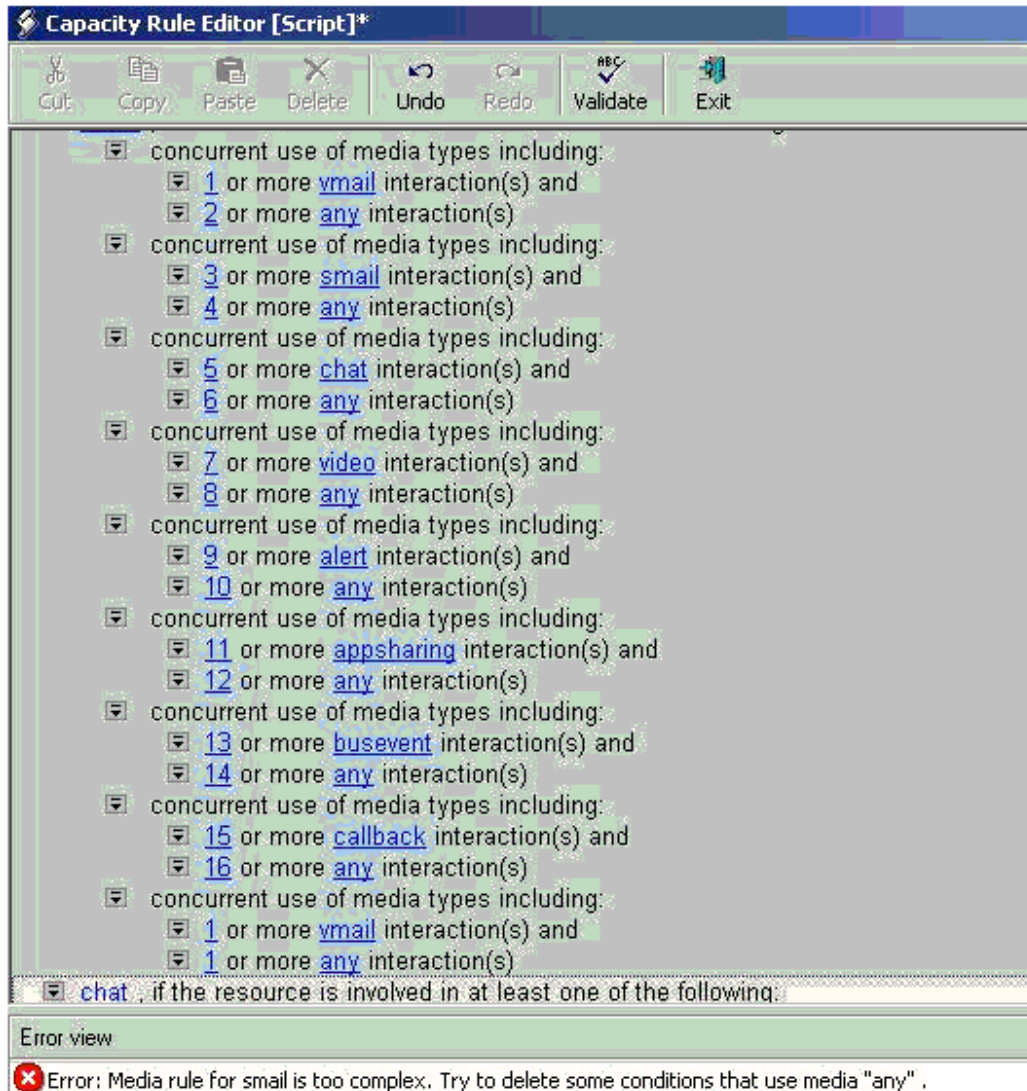
1. Either delete the redundant media rule or change the redundant media rule to a medium that has not already been defined for the capacity rule.
2. Validate the rule.

## Media Rule Too Complex

The Error View displays the following message when you validate a capacity rule that contains two or more media rules of the same type:

Error: Media rule for <media\_name> is too complex. Try to delete some conditions that use media "any"

The Capacity Rule Editor has some internal limitations for the number of concurrent conditions and conditions that specify any interaction that it can handle. [Figure 28](#) illustrates a capacity rule that surpasses these internal limitations.



**Figure 28: Example of Too Complex Media Rule**

To correct this error:

1. Remove from your media rule some of the **any** interaction(s) used in concurrent conditions.
2. Validate the rule.

## How Stat Server Handles Invalid Rules

If an agent capacity rule is invalid or missing, the place capacity rule applies to the agent. If the place capacity rule is invalid or missing, then the tenant capacity rule applies to the agent. If the tenant capacity rule is invalid or missing, then the Default capacity rule applies to the agent.





## Supplements

# Related Documentation Resources

The following resources provide additional information that is relevant to this software. Consult these additional resources as necessary.

## Management Framework

- *Framework 8.0 Stat Server User's Guide*
- *Framework 8.0 Stat Server Deployment Guide*
- *Framework 8.0 SIP Server Deployment Guide*
- *Framework Combined Log Events Help*

## Multimedia

- *Multimedia 8.0 Deployment Guide*

## Genesys

- *Genesys 8.0 Instant Messaging Solution Guide*
- *Genesys Technical Publications Glossary*, which ships on the Genesys Documentation Library DVD and which provides a comprehensive list of the Genesys and computer-telephony integration (CTI) terminology and acronyms used in this document.
- *Genesys Migration Guide*, which ships on the Genesys Documentation Library DVD, and which provides documented migration strategies for Genesys product releases. Contact Genesys Technical Support for more information.
- Release Notes and Product Advisories for this product, which are available on the Genesys Technical Support website at <http://genesyslab.com/support>.

Information about supported hardware and third-party software is available on the Genesys Technical Support website in the following documents:

- *[Genesys Supported Operating Environment Reference Manual](#)*
- *[Genesys Supported Media Interfaces Reference Manual](#)*

For additional system-wide planning tools and information, see the release-specific listings of System Level Documents on the Genesys Technical Support website, accessible from the [system level documents by release](#) tab in the Knowledge Base Browse Documents Section.

Genesys product documentation is available on the:

- Genesys Technical Support website at <http://genesyslab.com/support>.
- Genesys Documentation Library DVD, which you can order by e-mail from Genesys Order Management at [orderman@genesyslab.com](mailto:orderman@genesyslab.com).



# Document Conventions

This document uses certain stylistic and typographical conventions—introduced here—that serve as shorthands for particular kinds of information.

## Document Version Number

A version number appears at the bottom of the inside front cover of this document. Version numbers change as new information is added to this document. Here is a sample version number:

80g\_pg\_rescap\_10-2009\_v8.0.001.00

You will need this number when you are talking with Genesys Technical Support about this product.

## Screen Captures Used in This Document

Screen captures from the product graphical user interface (GUI), as used in this document, may sometimes contain minor spelling, capitalization, or grammatical errors. The text accompanying and explaining the screen captures corrects such errors *except* when such a correction would prevent you from installing, configuring, or successfully using the product. For example, if the name of an option contains a usage error, the name would be presented exactly as it appears in the product GUI; the error would not be corrected in any accompanying text.

## Type Styles

[Table 2](#) describes and illustrates the type conventions that are used in this document.

Table 2: Type Styles

Type Style	Used For	Examples
Italic	<ul style="list-style-type: none"> <li>Document titles</li> <li>Emphasis</li> <li>Definitions of (or first references to) unfamiliar terms</li> <li>Mathematical variables</li> </ul> <p>Also used to indicate placeholder text within code samples or commands, in the special case where angle brackets are a required part of the syntax (see the note about angle brackets on <a href="#">page 66</a>).</p>	<p>Please consult the <i>Genesys Migration Guide</i> for more information.</p> <p>Do <i>not</i> use this value for this option.</p> <p>A <i>customary and usual</i> practice is one that is widely accepted and used within a particular industry or profession.</p> <p>The formula, <math>x + 1 = 7</math> where <math>x</math> stands for . . .</p>
Monospace font (Looks like teletype or typewriter text)	<p>All programming identifiers and GUI elements. This convention includes:</p> <ul style="list-style-type: none"> <li>The <i>names</i> of directories, files, folders, configuration objects, paths, scripts, dialog boxes, options, fields, text and list boxes, operational modes, all buttons (including radio buttons), check boxes, commands, tabs, CTI events, and error messages.</li> <li>The values of options.</li> <li>Logical arguments and command syntax.</li> <li>Code samples.</li> </ul> <p>Also used for any text that users must manually enter during a configuration or installation procedure, or on a command line.</p>	<p>Select the Show variables on screen check box.</p> <p>In the Operand text box, enter your formula.</p> <p>Click OK to exit the Properties dialog box.</p> <p>T-Server distributes the error messages in EventError events.</p> <p>If you select true for the inbound-bsns-calls option, all established inbound calls on a local agent are considered business calls.</p> <p>Enter exit on the command line.</p>
Square brackets ([ ])	<p>A particular parameter or value that is optional within a logical argument, a command, or some programming syntax. That is, the presence of the parameter or value is not required to resolve the argument, command, or block of code. The user decides whether to include this optional information.</p>	<pre>smcp_server -host [/flags]</pre>
Angle brackets (< >)	<p>A placeholder for a value that the user must specify. This might be a DN or a port number specific to your enterprise.</p> <p><b>Note:</b> In some cases, angle brackets are required characters in code syntax (for example, in XML schemas). In these cases, italic text is used for placeholder values.</p>	<pre>smcp_server -host &lt;confighost&gt;</pre>



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