

Performance Management Advisors 8.0

Frontline Advisor

Agent User's Guide

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List of Procedures





Preface

Welcome to the Genesys *Performance Management Advisors 8.0 Frontline Advisor Agent User's Guide*. This document describes how to use the agent features of Frontline Advisor.

This document is valid only for the 8.0 release of this product.

Note: For versions of this document created for other releases of this product, visit the Genesys Technical Support website, or request the Documentation Library DVD, which you can order by e-mail from Genesys Order Management at orderman@genesyslab.com.

This preface contains the following sections:

- About Frontline Advisor, page 7
- Intended Audience, page 8
- Making Comments on This Document, page 8
- Contacting Genesys Technical Support, page 9
- Document History, page 9

For information about related resources and about the conventions that are used in this document, see the supplementary material starting on page 27.

About Frontline Advisor

Frontline Agent Advisor improves both agent performance and customer satisfaction by giving agents a real-time view of their activity. Customizable alerts draw immediate attention to performance-related activity, good, or otherwise.

The real-time data enables agents to correct problems and reinforce progress as it happens, not after the break or during the next shift. Frontline Agent Advisor puts everything agents need to pay attention to in a single location, so they can capture the priority issues and quickly direct their attention to areas that may require attention.

Current status, performance, behavioral- or activity-based data can be presented in customized views. Sophisticated, configurable business rules

Preface Intended Audience

> monitor key performance indicators and call attention to situations requiring immediate attention.

The alert activity in Frontline Agent Advisor makes agent activity trends more obvious.

Frontline Agent Advisor is designed to help agents raise their performance, allowing them to instantly identify activities that need correction or additional training, as well as areas where agents are performing optimally.

Intended Audience

This document is primarily intended for agent users of Frontline Advisor. It has been written with the assumption that you have a basic understanding of:

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

Making Comments on This Document

If you especially like or dislike anything about this document, feel free to e-mail your comments to Techpubs.webadmin@genesyslab.com.

You can comment on what you regard as specific errors or omissions, and on the accuracy, organization, subject matter, or completeness of this document. Please limit your comments to the scope of this document only and to the way in which the information is presented. Contact your Genesys Account Representative or Genesys Technical Support if you have suggestions about the product itself.

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India	000-800-100-7136 (toll-free) +91-(022)-3918-0537	support@genesyslab.com.au
Japan	+81-3-6361-8950	support@genesyslab.co.jp

Before contacting technical support, refer to the *Genesys Technical Support Guide* for complete contact information and procedures.

Document History

New in Document Version 8.0.001.02

Minor textual corrections have been made in this release of the document.

Preface **Document History**



Chapter



Agent Advisor

This chapter describes how agents can use Agent Advisor to view their activity in real time. It contains the following sections:

- Overview, page 11
- Agent Advisor, page 12
- How Agent Advisor Monitors Agents, page 13
- The Team View, page 16
- Customizing the Display, page 20

Overview

Introduction

Agent Advisor improves both agent performance and customer satisfaction by giving agents a real-time view of their activity. Customizable alerts draw immediate attention to performance-related activity, good or otherwise.

The real-time data enables agents to correct problems and reinforce progress as it happens, not after the break or during the next shift. Agent Advisor puts everything agents need to pay attention to in a single location, so they can capture the priority issues and quickly direct their attention to areas that may require attention.

Current status, performance, behavioral or activity-based data can be presented in customized views. Sophisticated, configurable business rules monitor key performance indicators and call attention to situations requiring immediate attention.

The alert activity in Agent Advisor makes agent activity trends more obvious.

Agent Advisor is designed to help agents raise their performance allowing them to instantly identify activities that need correction or additional training, as well as areas where agents are performing optimally. The essential capabilities of Agent Advisor are the following:

- Presentation of real-time agent metrics, states, and KPIs
- Presentation of real-time team metrics and KPIs
- Performance alerts based on current trending
- Threshold alerts based upon ranges of values
- Presentation of current agent's alerts
- Console personalization, per agent
- Multi-level monitoring hierarchy
- Monitoring hierarchy importer
- Link to and from external applications
- Hierarchical inheritance of threshold and rule parameters
- Hierarchical rollup of agent and team metrics and KPIs

Functionality

An instance of Agent Advisor is made available to each agent. A multilevel monitoring hierarchy defines the agent groupings that each agent is a member of.

The agent is presented with real-time agent-specific information in a succinct row-and-column format. The agent information is also rolled into team information. Colors and other indicators are used to quickly draw attention to items of significance.

Administrator-configured business rules, including thresholds, suggest which items are significant. Rules are used to issue alerts, further focusing agent attention on their performance and providing details as to what behavior produced each alert. Thresholds and rules are always in effect, always evaluating the most current information. Rules and threshold parameters are stored and inherited throughout the monitoring hierarchy.

Users can also navigate to Agent Advisor from external applications, as well as navigate from Agent Advisor to external applications, using World Wide Web URLs.

Agents can view the details of an alert, which include any annotations (called notes) that the agent's supervisor may have input. When a supervisor saves a note with an alert, that alert is marked as cleared. Each alert has a status of either cleared or uncleared. Only the existence of uncleared alerts affects the user display.

Alerts are saved into the Agent Advisor history, along with the timestamp, other alert details, and the saved note if there is one. The history of alerts is referred to as the Alert Log, which can be viewed and printed.

Agent Advisor

The Agent Advisor console is divided into four panes:



- Team pane—Displays your overall status in real time.
- My Current Alerts pane—Displays the details of your uncleared alerts.
- My Alert History pane—Displays the details of your cleared and uncleared alerts.
- Configure pane—Allows you to choose which columns are displayed.

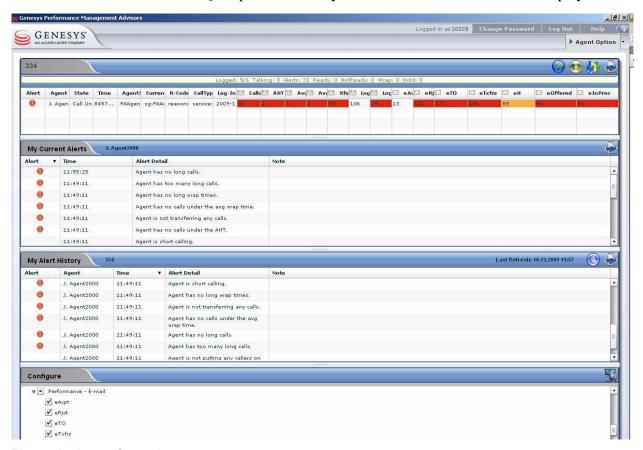


Figure 1: Agent Console

How Agent Advisor Monitors Agents

Thresholds, Rules and Metrics

Thresholds and rules are defined in the Administration Console by users with the admin role. Thresholds define the critical, warning, and acceptable conditions for each metric. Thresholds and rules can be used to find positive behavior as well.

Thresholds

A threshold compares a measured value at a point in time to a threshold range to determine the status. Depending on the metric, a value may be acceptable above or below a certain value. Some rules trigger an alert if the value is below or above defined values, as shown in Table 1 on page 14.

Table 1: Alert Thresholds

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

The four text boxes are colored to provide a visual cue for the status (Figure 2). Red indicates a critical value range. Yellow indicates a warning value range. No color displayed indicates an acceptable value range.

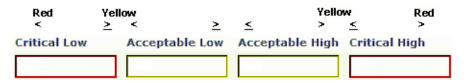


Figure 2: Threshold Bar

Examples

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

Example 1 For an average of three-minute calls, handling two or more calls but less than or equal to five calls is acceptable. Handling one call is yellow. Handling less than one call is red. Handling more than five calls but less than or equal to

eight calls (that is, the calls are too short) is yellow. And handling more than eight calls (that is, short-calling) is red (Figure 3) 5 8 NCH Figure 3: Threshold Acceptable Between Two Values Example 2 In the example in Figure 4, handling two or more calls but less than or equal to five calls is acceptable. Handling one call triggers a warning (yellow). Handling less than one call or more than five calls is a critical (red). NCH Figure 4: Threshold Without a High Yellow Warning In the example in Figure 5, handling one or more calls but less than or equal to Example 3 five calls is acceptable. Handling more than five calls but less than or equal to eight calls triggers a warning (yellow). Handling less than one call or more

NCH 1 1 5 8

than eight calls is a critical (red).

Figure 5: Threshold Without a Low Yellow Warning

Rules

Rules are conditions that continuously monitor statistics. For example, an agent has more than 10 agent calls transferred in the past 10 minutes. If a rule is triggered, an alert is generated. Alerts help to focus your attention on the most important issues affecting performance. Rules also count events throughout an interval of time, which allows them to trigger on the frequency of events. The frequency of an alert is a leading indicator of good or bad trends. It is good practice to learn to make use of alerts to quickly focus on Rules evaluate and trigger on agent metrics, but not for team metrics.

Types of Threshold and Rule

The five types of thresholds and rules are:

Table 2: Types of Threshold and Rule

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



Red indicates at least one critical alert.

Green indicates that no alerts are active: the value is normal. In addition, a gray icon indicates the agent is not logged into the ACD.

The Team View

The Team view (Figure 6 on page 17) is where you can focus on your overall status in real time. The information is updated and refreshed by default every 10 seconds for state data and 10 minutes for performance data. The refresh rate is configured in the Administration module. Some default columns include:

- Alert—The agent's current alert state is indicated by a colored icon. In addition to red and green, a gray icon indicates the agent is not logged into the ACD.
- Agent—The first initial and last name
- State—The agent's current state, including:
 - Not Monitored
 - Monitored
 - Logged On
 - On Hook
 - Call Conferenced
 - Call Dialing,

- Talking
- Call Internal
- Call Outbound.
- Call Held
- Call Initiated
- Call Unknown.
- Not Ready
- Off Hook
- Readv
- Logged Off,
- After Call Work
- Agent Work Not Ready.
- Time—The amount of time that the agent has been in the current state (minutes:seconds)
- R-Code—A code indicating the reason for the agent's most recent change of state.
- Agent ID—The agent's identification (Figure 6).
- Log-In—The login time of the agent.
- Current Skill—The agent's current skill (only visible with Cisco Adapter)
- Call Type—The current call type (applicable only with Cisco Adapter)



Figure 6: The Team View

Viewing Your Team's Status

Your team's status displays how many agents are logged in and other state information (for example, talking, ready, not ready, wrapping up, on hold, and the number of alerts).



Figure 7: Team Status

The information updates by default every 10 seconds.

My Current Alerts

The details of your uncleared alerts are displayed in the My Current Alerts view (Figure 8 on page 18). Your name displays beside the My Current Alerts view. The visible alerts are those generated on the current day since 12:00 a.m.

A procedure runs according to the Performance Calculation Interval set by the admin user and moves violations that are older than 24 hours to a violations archive table. Hence at any given time the violations that appear in this panel are violations generated on the current day since 12:00 a.m. Violations are displayed by default in reverse chronological order.

The details of the My Current Alerts view include:

- Alert—The alert's status (red). Values do not update in the My Current Alerts view until you log in.
- Time—The time when the alert was triggered on the current day (hh:mm:ss).
- Alert Detail—The rule description.
- Note—A note for the alert from your supervisor.



Figure 8: My Current Alerts

My Alert History

The details of your alerts display in the My Alert History view (Figure 9 on page 19). Your team's name is displayed beside the My Alert History tab. The visible alerts are those generated on the current day since 12:00 a.m. A procedure runs according to the Performance Calculation Interval set by the admin user and moves violations that are older than 24 hours to a violations archive table. Hence at any given time the violations that appear in this panel are violations generated on the current day since 12:00 a.m. The violations are displayed by default in reverse chronological order. You cannot view alerts that were generated 24 hours before the current time.

The details of the My Alert History view include:

- Alert—Your alert state is indicated by the color of icon.
- Agent—Your first initial and last name if you have had any alerts since 12:00:00 a.m.
- Time—The time when the alert was triggered on the current day (hh:mm:ss).
- Alert Detail—Explanatory text describing what situation triggered the alert.
- Note—The text a supervisor provides for the alert.

Update the list by clicking the Refresh button. The date and time of the last refresh display next to the Refresh button.





Figure 9: My Alert History

Printing Your Performance

You can view your performance in a formatted report.

The report is generated as a PDF file. Hence when you click the Print button for a particular pane in the dashboard the PDF file is generated. One of the following two things can happen:

- 1. If your machine has a default PDF Viewer (like Acrobat Reader), the data will appear in the PDF Viewer. You can then save or print the document using the PDF Viewer.
- 2. If your machine does not have a default PDF Viewer, an Opening FA.pdf window will appear. You can then select to open the PDF with a PDF Viewer application or save the PDF file on the disk.

One of the prerequisites to view the PDF file is to have a PDF viewer installed on the machine where the PDF document will be viewed.

Printing Your Current View of the My Current Alerts View

You can print the alerts from the My Current Alerts view in a formatted report by clicking the Print button. The data is formatted as a PDF report and can be saved or opened using the PDF Viewer. The PDF document can be printed using the PDF Viewer.

- Your name
- Alert detail
- Time the alert was issued
- A Supervisor note

Printing the Alerts Log in My Alert History

You can print the alerts from the My Alert History view in a formatted report by clicking the Print button. The data is formatted as a PDF report and can be saved or opened using the PDF Viewer. The PDF document can be printed using the PDF Viewer. The report includes all issued alerts since the last refresh that is currently being monitored. Each row displays:

- Alert status
- Your name

- Time the alert was issued
- Descriptive text associated with the rule triggering the alert
- A Supervisor note

Opening a Defined URL

You can open a Web site that your administrator defined by clicking the dynamic link button (the ToolTip for this button is called LinkOut.)

User Status/Violation Status Button

You can display the User Status/Violation Status button to monitor the status of alerts while Frontline Agent Advisor runs in the background. When you trigger an alert, the icon becomes red. You may want to keep the User Status/Violation Status button (Figure 10) on your desktop, then if/when it changes color, open Frontline Agent Advisor to see the details.



Figure 10: User Status/Violation Status Button

Customizing the Display

Choosing Metric Columns

You can select which of the optional metrics are displayed.

Procedure:

Choosing columns to display

Start of procedure

- 1. Expand the Configure view. The column chooser is then displayed (Figure 11 on page 21.)
- **2.** Select the relevant check boxes. Include all agent states or performance metrics by selecting the State or Performance check box. Exclude agent states or performance metrics by clearing check boxes or exclude all agent states or performance metrics by clearing the State or Performance check box.

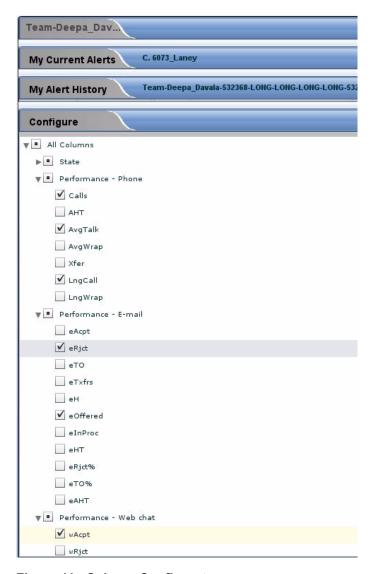


Figure 11: Column Configurator

3. Click Apply. The selected columns display in the Team view.

End of procedure

Ordering the Metrics

You can change the order the metrics display by dragging a column heading to another location in the view. The default columns always display to the left of the optional columns. You cannot hide or move the default columns.

Personalized settings are linked to your user ID, so will work wherever you log in.

Sorting the Views

You can sort a view by clicking a column heading. You can sort the view in ascending or descending order. Sorting by the Alerts column is a great way to see all red alerts first. A sort triangle indicates the direction. The sorting persists if you log out and back in.

Adjusting the Width of Columns

If one or more columns are selected to, or removed from, display, the width of the columns adjusts accordingly. There is a minimal default width. Adjust the width of individual columns, by dragging the pointer when it changes to a 💠 near the column break.

Resizing the Views

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

Persistent Settings

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

- Column selection, sorting and widths.
- Location of the splitters.
- Team performance or team statistics.



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Chapter

2

Genesys Advisors Browser

This chapter describes how to use the Advisors Browser. This chapter contains the following sections:

Using the Genesys Advisors Browser, page 23

Using the Genesys Advisors Browser

The Genesys Advisors Browser is installed in your Start folder or on your desktop, so when you log in to your computer you can click on the Advisors Browser button to bring up the browser. Only users with the admin role can access the Administration Console.

Procedure:

Logging in to the Advisors browser

Start of procedure

- 1. Double click on the Advisors Browser icon.
 The Login page is displayed (Figure 12 on page 24).
- **2.** Type a user name and password.
- 3. The host name is http://home.genesysadvisors.local by default. However, if the home.genesysadvisors.local server is not found while the Login page loads, you must type your server name in the Host Name field. The host name is configured by the installer. If it is incorrect, see your system administrator. The new host name will become the default server for subsequent logins.

- **4.** To save the user name and password on your local machine, check the Remember Me on this Computer check box. If selected, the user name and password will pre-populate when you start the Advisors Browser.
- 5. Click the Log In button. The Advisors Browser displays with the module tabs to which you have

Once logged in, you can display other modules to which you have access in other windows by clicking the w button.

End of procedure



Figure 12: Advisors Browser Login Page

Navigation

Only the modules to which you have access are displayed. The tab labels are configurable in the Contact Center Advisor Administration module on the System Configuration page.



Figure 13: Advisors Browser Tabs

Requesting a New Password

Procedure: Requesting a new password

Start of procedure

1. On the Login page, click Forgot Your Password? A Forgot Password? page is displayed (Figure 14).

Note: If your company uses LDAP, you must use your corporate tools to change your LDAP password.

- **2.** Type your user name.
- **3.** Type your e-mail address.
- **4.** Click Submit.

 A new password is sent to your e-mail address.



Figure 14: New Password Page

End of procedure

Changing a Password

Procedure: Changing a password

Prerequisites

You must be logged in to change your password.

Start of procedure

1. Click the Change Password button. A Change Password page displays (Figure 15).

Note: If your company uses LDAP, you must use your corporate tools to change your LDAP password.

- **2.** Type your current password.
- Type your new password.
- **4.** To confirm, retype your new password.
- To save, click Submit.

End of procedure



Figure 15: Change Password Page

Accessing Help

You can display this document in PDF form by clicking the Help button.

Logging Out

Log out of the Advisors Browser by clicking the Log Out button. This closes all instances of the application you are logged into.

Note: Using the browser Close button only closes the current instance of your application. Always log out before closing the browser.



Supplements

Related Documentation Resources

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

Performance Management Advisors

- Performance Management Advisors 8.0 Platform Deployment Guide describes how to install and configure the Advisor Platform.
- Performance Management Advisors 8.0 Frontline Advisor Deployment Guide describes how to install and configure Frontline Advisor.
- Performance Management Advisors 8.0 Cisco Adapter Deployment Guide describes how to configure and install the Cisco Adapter.
- Performance Management Advisors 8.0 Genesys Adapter Deployment Guide describes how to configure and install the Genesys Adapter.
- Performance Management Advisors 8.0 Contact Center Advisor & Workforce Advisor Deployment Guide describes how to configure and install Contact Center Advisor Workforce Advisor.
- Performance Management Advisors 8.0 Contact Center Advisor & Workforce Advisor Administrator User's Guide describes how to configure your enterprise hierarchy and set up threshold rules/goals and users.
- Performance Management Advisors 8.0 Contact Center Advisor User's Guide describes how to personalize your display of information for monitoring and root cause analysis.
- Performance Management Advisors 8.0 Workforce Advisor User's Guide describes how to personalize your display of information for monitoring and root cause analysis.
- Performance Management Advisors 8.0 Frontline Advisor Administrator User's Guide describes how to perform administration functions for Frontline Advisor.
- Performance Management Advisors 8.0 Frontline Advisor Manager User's Guide describes how to perform manager functions for Frontline Advisor.

- Performance Management Advisors 8.0 Frontline Advisor Agent Advisor User's Guide describes how to perform agent functions for Frontline Advisor.
- Performance Management Advisors 8.0 Alert Management User's Guide describes how to manage the actions taken to resolve alerts and use the database to learn and repeat successes.
- Performance Management Advisors 8.0 Resource Management User's Guide describes how to maintain skill levels and agents.
- Performance Management Advisors 8.0 Performance Monitor User's Guide summarizes how to personalize your display of information for monitoring.
- Performance Management Advisors 8.0 Workforce What-If Tool User's Guide describes and gives examples of scenarios that illustrate how to adjust resource levels to achieve optimal outcomes.

Genesys

- 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://qenesyslab.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

Consult these additional resources as necessary:

- Genesys Hardware Sizing Guide, which provides information about Genesys hardware sizing guidelines for Genesys releases.
- Genesys Interoperability Guide, which provides information on the compatibility of Genesys products with various Configuration Layer Environments; Interoperability of Reporting Templates and Solutions; and GPlus Adapters Interoperability.
- Genesys Licensing Guide, which introduces you to the concepts, terminology, and procedures relevant to the Genesys licensing system.



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.

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:

80fr ref 06-2008 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 3 describes and illustrates the type conventions that are used in this document.

Table 3: Type Styles

Type Style	Used For	Examples
Italic	 Document titles Emphasis Definitions of (or first references to) unfamiliar terms Mathematical variables 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 page 31). 	Please consult the <i>Genesys Migration Guide</i> for more information. Do <i>not</i> use this value for this option. A <i>customary and usual</i> practice is one that is widely accepted and used within a particular industry or profession. The formula, $x + 1 = 7$ where x stands for

Table 3: Type Styles (Continued)

Type Style	Used For	Examples
Monospace font (Looks like teletype or typewriter text)	 All programming identifiers and GUI elements. This convention includes: 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. The values of options. Logical arguments and command syntax. Code samples. Also used for any text that users must manually enter during a configuration or installation procedure, or on a command line. 	Select the Show variables on screen check box. In the Operand text box, enter your formula. Click OK to exit the Properties dialog box. T-Server distributes the error messages in EventError events. If you select true for the inbound-bsns-calls option, all established inbound calls on a local agent are considered business calls. Enter exit on the command line.
Square brackets ([])	A particular parameter or value that is optional	smcp_server -host [/flags]
Angle brackets (<>)	A placeholder for a value that the user must specify. This might be a DN or a port number specific to your enterprise. Note: 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.	smcp_server -host <confighost></confighost>

Document Conventions





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[] (square brackets)	font styles italic
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