Management Intelligence Guide

GoldMine Software Corporation

GoldMine® FrontOffice 2000™

10/99

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Management Intelligence

Overview

GoldMine's Management Intelligence consists of two powerful reporting and analysis tools that help managers do a better job of understanding how their business is 'really doing'. Often managers are left on their own to determine how their teams, operations or other areas in their business are performing. Now, with GoldMine's unique Management Intelligence, not only can managers analyze and report on how their business is doing in real-time, but they can also make decisions pro-actively—instead of re-actively. GoldMine's Management Intelligence includes Manager's Console and Answer Wizard, both of which provide you with an integrated solution that offers the flexibility necessary to monitor and analyze information from teams as diverse as sales and support.

The ability to make timely, sound business decisions is only possible when the information you need is relevant, accessible and accurate. GoldMine's Management Intelligence tools not only help you get to information quickly, they also present information that is both meaningful and accurate. As a result, GoldMine does more than just give you the data on which you can base decisions, it also -helps you determine the best course of action.

Whether you work in support, sales or marketing, GoldMine's Management Intelligence takes all the information collected from front line contacts and delivers it to the rest of the organization—including call histories, open support tickets, forecasts or credit issues. Not only does Management Intelligence track and disseminate information, it actually transforms the information in your company into an asset.

GoldMine's 'out of the box' approach means that we have already done the work for you, with easy to use metrics and reports that help you make better and more informed business decisions.

Manager’s Console for the Sales Manager and Support Manager

Manager’s Console provides at-a-glance summaries of the overall status of a support center or sales department. It allows managers to proactively review and manage critical business issues, and facilitate future responses to recurring problems. Through a wizard interface you define metrics to monitor issues, set threshold levels, and specify an action to take when threshold levels are reached. Managers are able to ***drill down*** from gauges, to a graph or to a call group. Manager’s Console also supports multiple statistics on a single graph, such as “open calls by tracker”. Managers can be assured that when a problem occurs or thresholds are crossed, it will automatically be brought to someone’s attention. This keeps managers aware of the current status of their operation. Use Manager’s Console to create metrics to stay on top of issues like high priority customers, overloaded staff, calls of abnormal durations, etc.

Managers must also address similar concerns from a historical perspective. This application allows the manager to capture information on metric activity to determine how many times during the month they came “close” to hitting ***critical*** status, or actually went into the “red zone”. By having the responsible team member document the cause and corrective action associated with a problem, the manager not only has a “suggested course of action” for future issues, but also has the necessary information to address any concerns management may have with overall performance. In addition, Managers Console provides statistical information to aid managers in justifying resource, technological and process changes.

Answer Wizard for the Sales Manager and Support Manager

GoldMine Answer Wizard is a management-reporting tool for the supervisor or manager. Answer Wizard not only provides immediate answers to the questions managers are asking, but also coaches them to understand the additional questions they should be asking. Through a wizard interface you are guided through the process of choosing reports that can provide answers to key business questions. Using GoldMine Answer Wizard’s query tools, you can choose from over 300 predefined reports built for your GoldMine database that focus on current and past performance. GoldMine Answer Wizard provides reports that can be viewed, printed, exported, or saved.

When you select a report, the GoldMine Answer Wizard makes running the reports easy. Selecting parameters for the report, such as date ranges, call types, or customer ID is performed with point-and-click simplicity. The parameters you choose are then passed to the report to get the information requested. Tactical questions such as “what is the current status of our support center calls” and “how many sales have we closed so far this month” can now be quickly answered. Strategic reports include answers to questions like “what are the top five causes for calls to the support center” and “what customers are in need of call backs.” If you find a report especially useful, you can copy that report into a Favorite Reports folder for quick and easy access. You can also add your own reports in Favorite Reports, letting you build your own Answer Wizard tree.

Service and Support categories of reports include:

- **Current Status** reports give you a pulse on how your staff is doing right now. Reports and graphs about active calls can be broken out, for example, by tracker, assignee, urgency, duration, priority, and many other groupings.
- **Call Analysis** reports provide a statistical perspective on the types of calls your support center handles over a given period.
- **Customer Information** reports show you active and historic calls by customer, as well as your most and least active customers.
- **Technician Statistics** reports are great for handing out work assignments or preparing for performance reviews.
- **Service Level Agreements** reports let you stay on top of your commitments, as well as provide an analysis to help you fine tune your goals.
- **Miscellaneous** reports provide information about your GoldMine system, such as all GMSS users in the Tracker table, security groups, table field definitions, and customer, configuration, and call types.

Sales and Marketing categories of reports include:

- **Account / Contact Information** - Managing contact information is core to any sales or marketing role. Whether you’re tracking prospects, customers or vendors, accessing this information when you need it, and how you need it, is critical to effective relationship management.

- **Personal and Team Calendars** - Day/Time planning is fundamental to any role. Whether you're scheduling work for yourself, delegating tasks to others or coordinating with an entire team, tracking and organizing your schedule is a basic requirement to ensure effective relationship management.
- **Past Activities -** Reviewing past activities allows you to get a summary of your or your team's progress, gather intelligence on specific events and better plan future activities. Accessing historical information is fundamental to building life-long customer relationships.
- **Sales Analysis -** Sales people spend a lot of their time calling, following up and trying to get various tasks done. Sales managers spend much of their time trying to understand and measure what their sales people do. Oftentimes, that means sales people have to stop selling to produce reports or information for management. Accessing timely and accurate sales information without generating increased administrative workloads, for both the sales person and sales manager, is critical to a sales team's success. With the appropriate information in hand, sales organizations can focus on selling and serving their customers to build profitable and lasting relationships.
- **Projects -** Account/contact management oftentimes requires more than just tracking names and conversations, it includes all of the tasks and responsibilities, as well as deadlines and inter-relationships between you, your team and the customer. Properly organizing and centralizing all the details related to a project is critical to effectively meeting the expectations of your customer relationships.

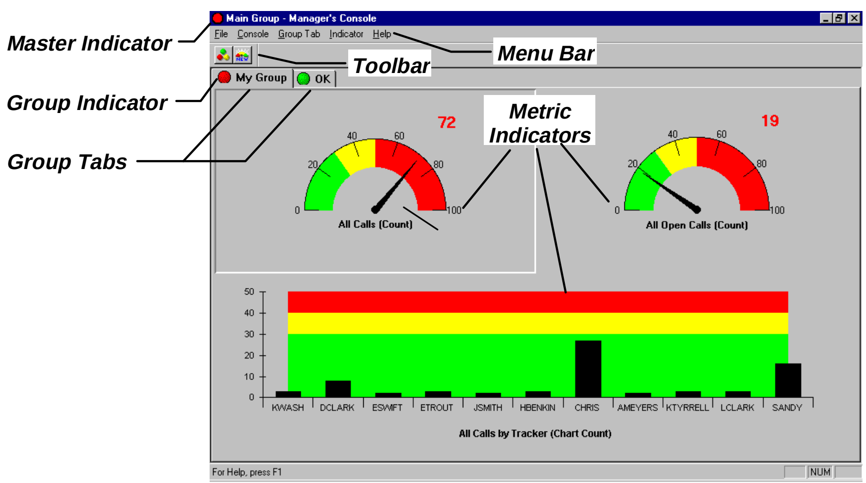
Manager's Console

Manager's Console

Introduction

Main Screen

The following graphics show the parts of the Manager's Console main screen.

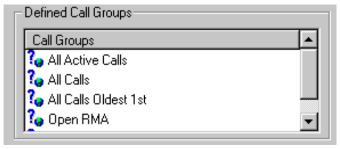


What is a Metric?

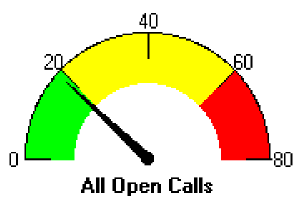
A Metric is a query that reflects the status of a monitored issue. For example, you can monitor the number of open calls by tracker or monitor the status of closed sales for a group. Results of the metric query are displayed as “indicators” (also called bar graphs or gauges).

With Manager's Console:

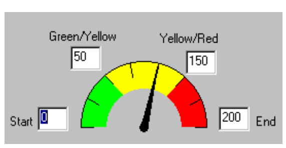
- You choose which Call Groups to monitor.



- Simple, easy-to-interpret graphics let you quickly determine if a monitored area is acceptable, needs some level of attention, or is in need of immediate attention. This high-level overview is an important aid that lets you manage proactively, addressing issues before they reach crisis stage.



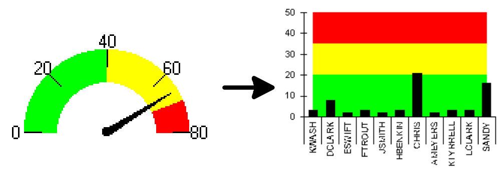
- You set the points of each gauge that display when a Call Group metric is 'normal' (green), 'questionable' (yellow), or 'unacceptable' (red).



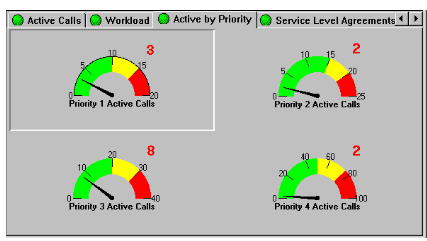
What is a Metric Indicator?

A graphical means of displaying the status of a Metric Query (a gauge or bar graph).

- Should you need more detail than the summary-level gauge provides, you can click on the gauge to see the data in bar graph form. If you need further detail, you can also choose to display the Call Log information from GMSS for that particular Call Group. This function is only available for GMSS users only.



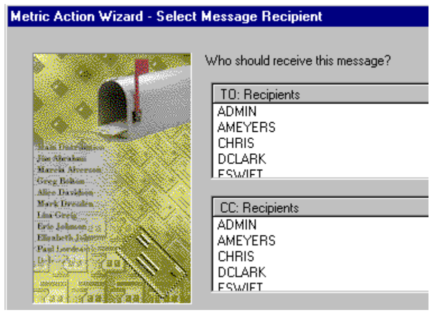
- You can group metrics into tabbed folders on screen, letting you view even more information at one time. A group status icon on the tab indicates whether one (or more) of the metrics has crossed a threshold.



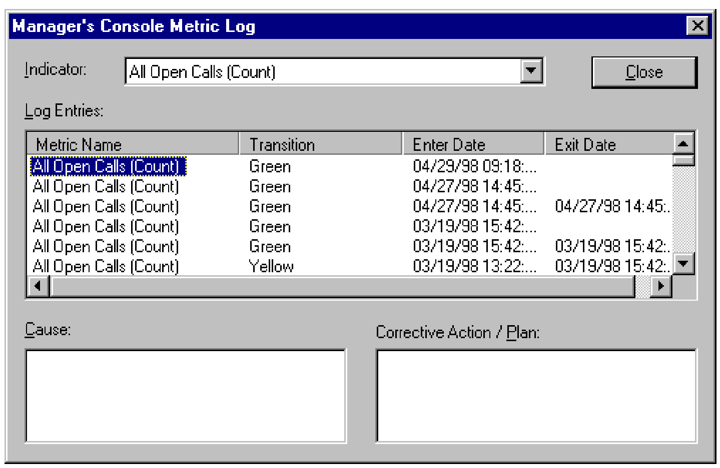
- Predefined metrics available for new customers get you up and running quickly in Manager's Console.

Implementing Solutions

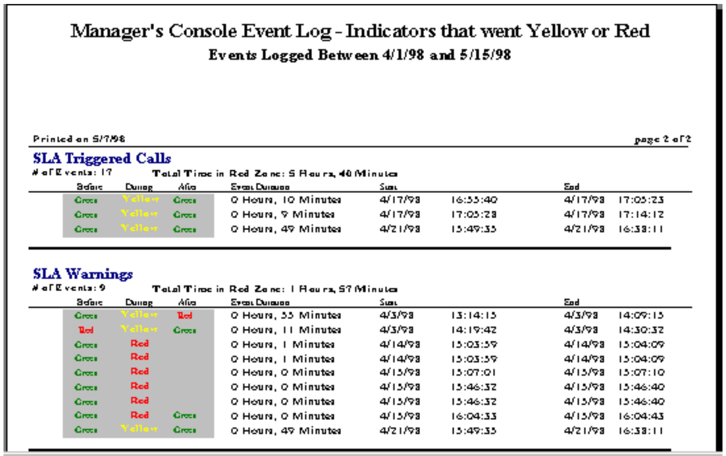
- If a metric crosses one of your set thresholds, for example, from normal to questionable (i.e., from green to yellow), it can notify you or someone you designate via e-mail. This means a response can be implemented automatically.



- The Metric Log gives you a written record of when (date and time) any of the chosen metrics crossed a threshold and how long they stayed there. You can record what caused the situation and the corrective action taken. This Metric Log is invaluable in helping you determine, "What did we do last time?" It can also aid you in determining whether you are over or under staffed, and provide objective information should you need justification for additional people. It can even help you get a handle on such intangibles as, "Do my people need additional training?"



The Metric Log information is used to generate Manager's Console reports in Answer Wizard product. Over 20 management reports are available to help you identify issues and plan for the future.



Manager's Console Event Log - Indicators that went Yellow or Red

Events Logged Between 4/1/98 and 5/15/98

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SLA Triggered Calls

of Events: 17 Total Time in Red Zone: 5 Hours, 40 Minutes

Before	During	After	Event Duration	Start		End	
Green	Yellow	Green	0 Hours, 10 Minutes	4/17/98	16:55:40	4/17/98	17:05:23
Green	Yellow	Green	0 Hours, 9 Minutes	4/17/98	17:05:28	4/17/98	17:14:12
Green	Yellow	Green	0 Hours, 49 Minutes	4/21/98	15:49:35	4/21/98	16:38:11

SLA Warnings

of Events: 9 Total Time in Red Zone: 1 Hours, 57 Minutes

Before	During	After	Event Duration	Start		End	
Green	Yellow	Red	0 Hours, 55 Minutes	4/3/98	13:14:15	4/3/98	14:09:15
Red	Yellow	Green	0 Hours, 11 Minutes	4/3/98	14:19:42	4/3/98	14:30:32
Green	Red		0 Hours, 1 Minutes	4/14/98	15:03:59	4/14/98	15:04:09
Green	Red		0 Hours, 1 Minutes	4/14/98	15:03:59	4/14/98	15:04:09
Green	Red		0 Hours, 0 Minutes	4/15/98	15:07:01	4/15/98	15:07:10
Green	Red		0 Hours, 0 Minutes	4/15/98	15:46:32	4/15/98	15:46:40
Green	Red		0 Hours, 0 Minutes	4/15/98	15:46:32	4/15/98	15:46:40
Green	Red	Green	0 Hours, 0 Minutes	4/15/98	16:04:33	4/15/98	16:04:43
Green	Yellow	Green	0 Hours, 49 Minutes	4/21/98	15:49:35	4/21/98	16:38:11

Manager's Console

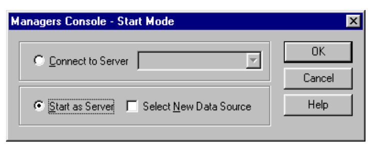
Chapter 1

Launching Manager's Console

To launch Manager's Console:

1. Click on **Start** in the Windows taskbar.
2. Select **Programs**, then **GoldMine**, then **Management Intelligence,** then **Manager's Console**.

   The **Start Mode** dialog box appears.



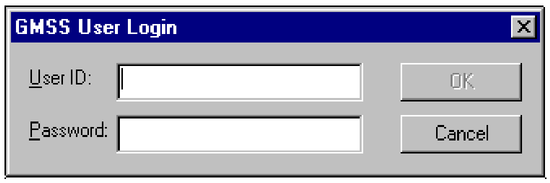
3. Select a **Start Mode** from the dialog box. The fields are explained below.

   Connect to Server – To connect to a server for the first time, you must select the **Connect to Server** radio button. In the field next to this option, type in the machine name of the PC acting as the server. For example, if the server machine name is **Server1**, type **Server1** in the **Connect to Server** field. When logging in after the first time, the server name you typed will be displayed in the drop-down list. Click **OK**.

Start as Server – When using this option, this machine will act as the server. Click the **Start as Server** radio button, then click **OK**.

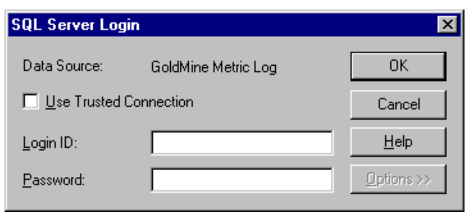
Select New Data Source – Check this box if you want to use a new data source for Manager's Console (this option is available only on the machine being used as the server). Click **OK**. If you select a new data source, you will be presented with the **Select Data Source** dialog box where you must select the **Machine Data Source** you want to use for Manager's Console

4. Click **OK**. The **User Login** dialog box appears.



5. Enter your **User ID** and **Password**. These are set initially by your System Administrator.

6. Enter your SQL Server **User ID** and **Password**. These are set initially by your System Administrator.



Sample Metrics

New Users

For new users, Mangers Console includes a starter database that you can use as a starting point for setting up your own information. The datasource, **GoldMine_Metric_log,** includes several tabs of predefined metrics that can be tailored to fit your specific needs. You can add and delete metrics to this starter database, as well as rename tabs, indicator labels, threshold settings, etc.

Manager's Console

Chapter 2

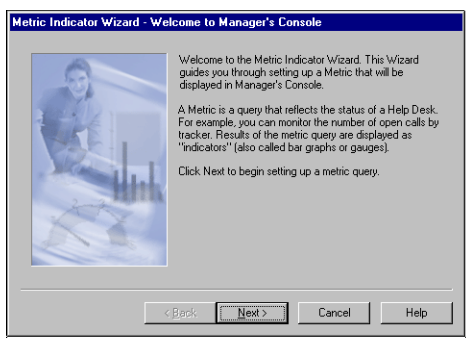
Using the Metric Indicator Wizard

Starting the Wizard

To start the Wizard:

1. Select the **New Indicator** button from the toolbar.

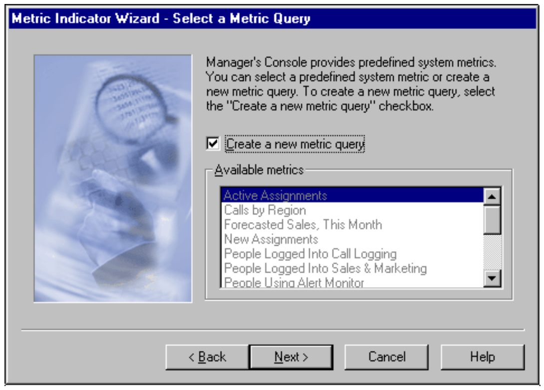
   The **Welcome to Manager's Console** dialog box introduces the **Metric Indicator Wizard**.



   Note: the following example demonstrates how to create a new Sales Metric. Other pre-defined based metrics differ slightly from the example given.

2. Click **Next**. The **Select a Metric Query** dialog box appears.

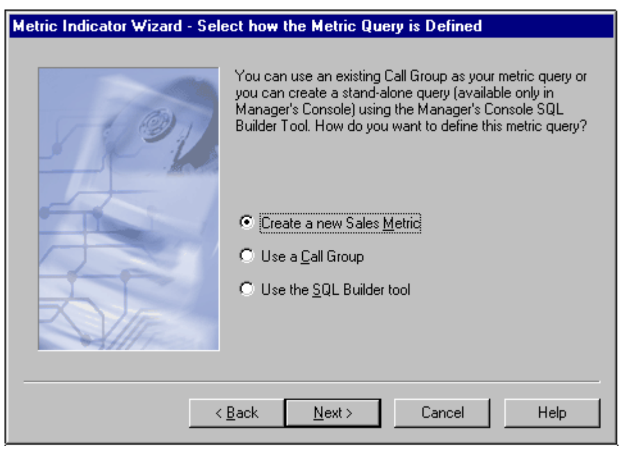
   This dialog box lets you create a new metric indicator.



3. If you choose to create a new metric, click on the **Create a new metric query** box.

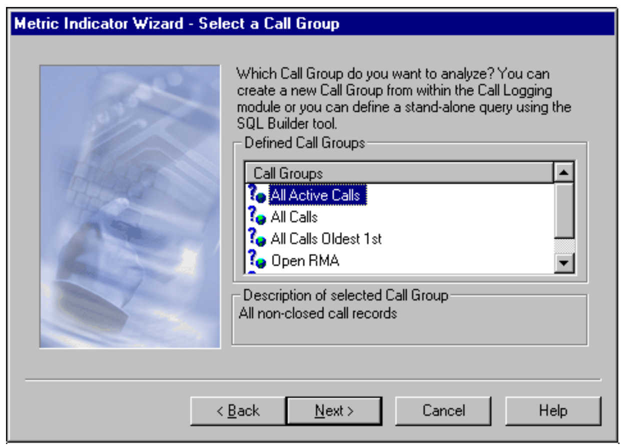
   If you want to monitor an existing Call Group, choose one from the **Available metrics** window. This window contains a list of all the groups already defined for Manger's Console.

4. Click **Next**. The **Select How the Metric Query is Defined** dialog box appears.



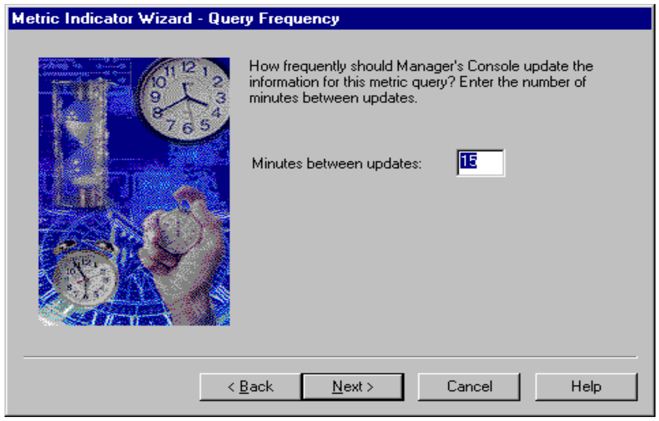
The **Select How the Metric Query is Defined** dialog box lets you tell Manager's Console whether you want to choose one of the pre-defined call groups or define one of your own. Generally you'll only want to select the **Use the SQL Builder tool** if you can't find a call group that defines what you want to measure.

5. Select a metric query definition.
   - Select the **Create a new Sales Metric** radio button if you want to use an existing GoldMine Sales and Marketing Call Group.
   - Select the **Use a Call Group** radio button if you want to use an existing Call Group.
   - Select the **Use the SQL Builder tool** radio button if you want to define a new Call Group.
6. Click **Next**. The **Select a Call Group** dialog box appears.



7. The **Defined Call Groups** window in the **Select a Call Group** dialog box displays a list of all the Call Groups defined in your system. Select a Call Group from the **Defined Call Groups** window.

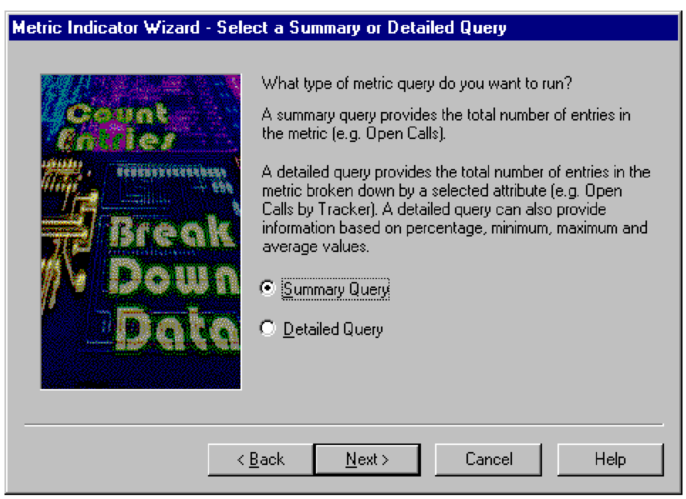
8. Click **Next**. The **Query Frequency** dialog box appears.



9. The **Query Frequency** dialog box lets you set how often Manager's Console will query your selected database. Enter a number to define the time between queries.

10. Click **Next**. The **Select a Summary or Detailed Query** dialog box appears.

    Manager's Console lets you display just the number of calls or break the information down according to fields. (Fields are specific sections of the data entries such as Date, Time, Call type, etc.)

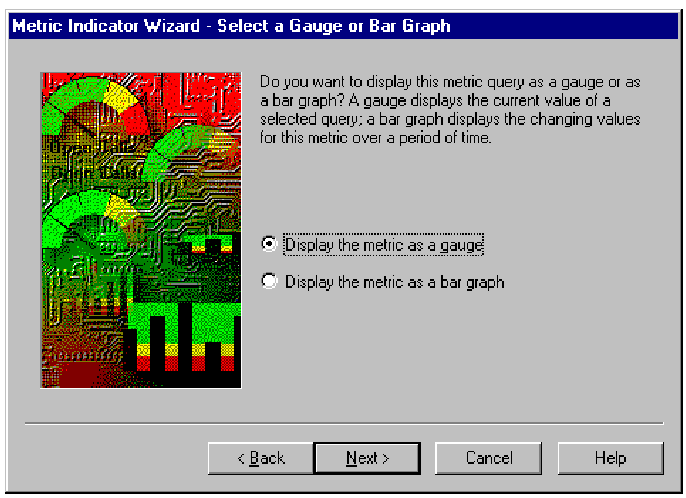


11. Select a radio button.

    - **Summary Query** – displays a simple count of the Call Group entries.
    - **Detailed Query** – displays a dialog box that lets you select the fields you want. Since this function displays a few different dialog boxes, it is covered in detail in the later section entitled ***Displaying Specific Data Fields***.

12. Click **Next**. The **Select a Gauge or Bar Graph** dialog box appears.

    A single-valued metric, like **All Open Calls**, can be displayed as a gauge that indicates the value the last time Manager's Console queried Call Logging. It can also be displayed as a bar graph that indicates the value over a range of times. For example, we could display **All Open Calls** as a bar graph of the number of calls at each query.

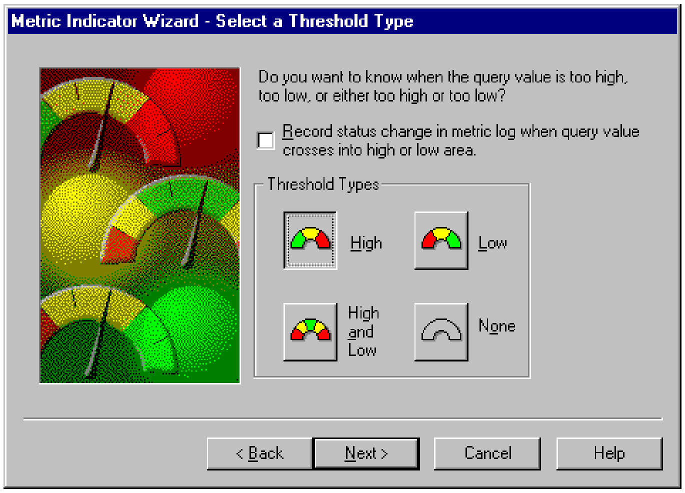


13. Select a radio button.

    - **Display the metric as a gauge** – select if you want a gauge.
    - **Display the metric as a bar graph** – select if you want a bar graph with values displayed at each query.

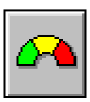
14. Click **Next**. The **Select a Threshold Type** dialog box appears.

    Gauges in Manager's Console may be displayed with no colors, or with green, yellow, and red to define thresholds. Thresholds are simply points you define to indicate when a metric is normal (green), questionable (yellow), or unacceptable (red).

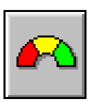


Record status change in metric log when query value crosses into high or low area – This button enables the Metric Log, into which each threshold crossing is recorded, along with the date, time, and other important data.

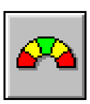
The threshold types are defined as follows:



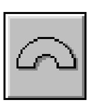
High – used for a metric that causes concern as it goes higher. An example would be **Open Calls**, since you want to monitor the number of calls as they go up.



Low – used for a metric that causes concern as it goes down. An example would be number of available GMSS licenses, since you would be concerned about running out of them.



High and Low – used for a metric that causes concern as it goes up or down from a set range. In other words, a metric that should stay in some middle range.

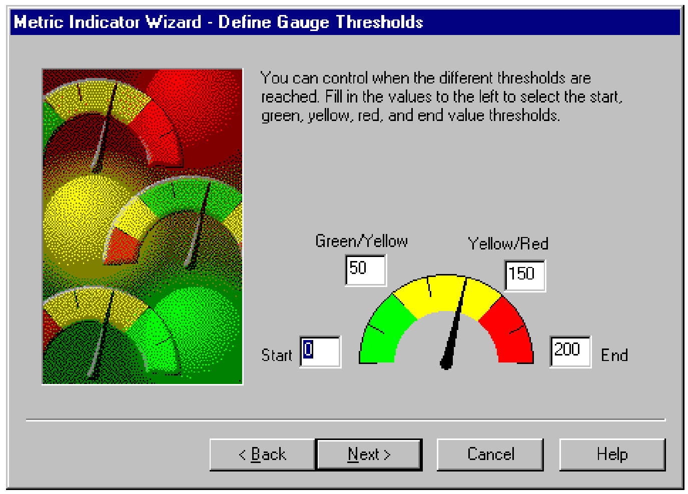


None – no defined thresholds, which also means no actions can be defined.

15. Select one of the **Threshold Type** buttons (i.e., **High**, **Low**, or **High and Low)**.

16. Click **Next**. The **Define Gauge Threshold** dialog box appears.

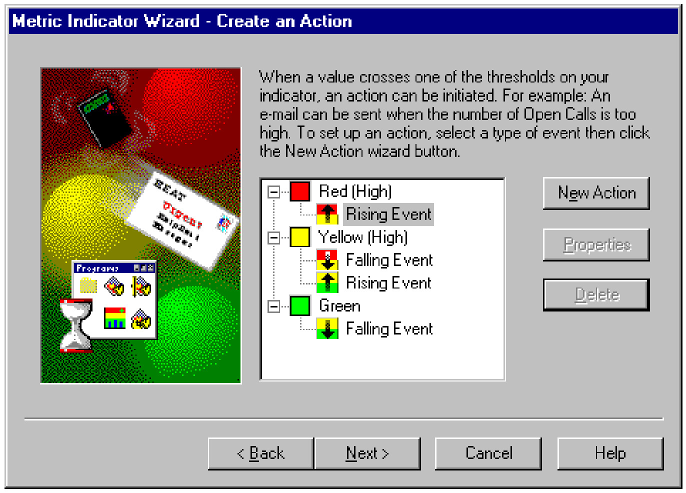
    The **Define Gauge Threshold** dialog box lets you define thresholds for your gauge, as well as the minimum and maximum values. Thresholds are those points that define the transition from green to yellow and yellow to red.



17. Use the default values or enter a number into each of the **Start**, **End**, **Green/Yellow**, **Yellow/Red** boxes.

18. Click **Next**. The **Create an Action** dialog box appears.

    Manager's Console has the ability to initiate actions when an indicator crosses a threshold. The **Create an Action** dialog box lists those actions.



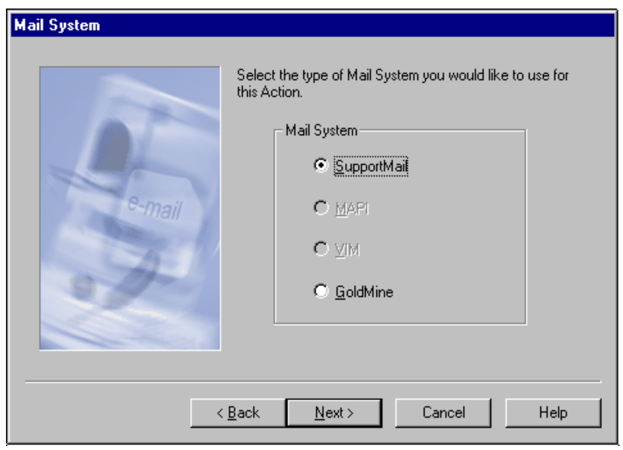
There are three buttons next to the **Action** window. The button functions are explained below.

- **New Action** – Lets you define a new action.
- **Properties** – Displays the properties of the selected action.
- **Delete** – Deletes the selected action.

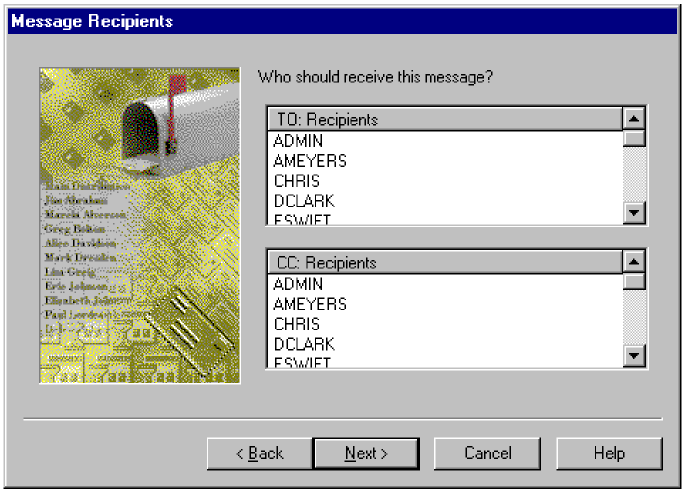
To Add a New Action

1. Click the **New Action** button to open the Metric Action Wizard which displays a series of dialog boxes (shown in sequence below) that let you send an e-mail message. The **Enter Action Name** dialog box displays.

2. Enter a name to describe the action. It can be anything descriptive of the action, e.g., E-mail to Karen. Click **Next**. The **Mail System** dialog box displays.



3. Select a mail system to use when sending the e-mail message.
4. Click **Next**. The **Message Recipients** dialog box appears.

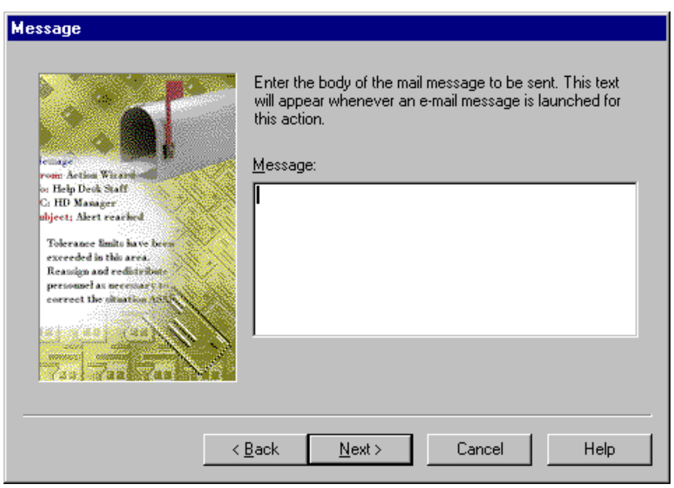


5. Select recipients for the message.

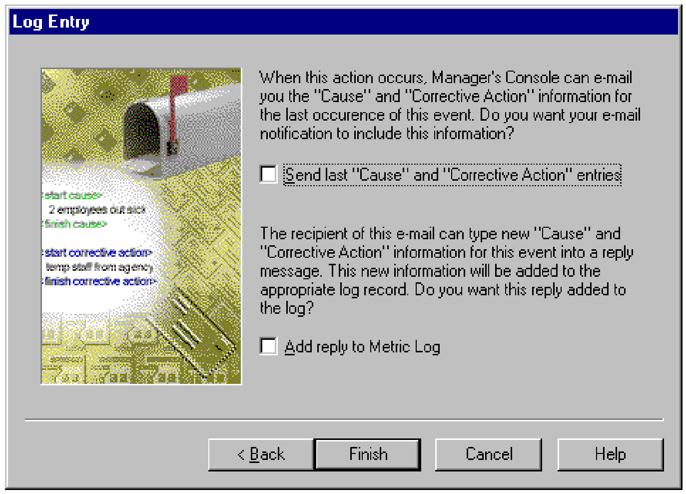
   TO: Recipients – The window displays a list of recipient's e-mail names (these are from your address book). Choose one or more recipients from this window.

   CC: Recipients – The window displays a list of recipient's e-mail names (these are from your address book). Choose one or more recipients from this window if you want to Carbon Copy them on the message.

6. Click **Next**. The **Message** dialog box appears.



7. Enter the contents of the message you want sent. This text will always appear when this action is triggered.
8. Click **Next**. The **Log Entry** dialog box appears.



- **Send last "Cause" and "Corrective Action" entries** – You can specify that the **Cause** and **Corrective Action** fields of the Metric Log (from the last time this transition occurred) be appended to the message.
- **Add Reply to Metric Log** – Takes the reply to this e-mail message and adds it to the **Cause** and **Corrective Action** fields in the Metric Log. This automates the process of filling in these fields and eliminates the possibility that someone will forget to fill in these fields.

Note: If you have not previously checked the **Record Status Change in Metric Log** box on the **Select a Threshold Type** wizard screen, this dialog box displays when you click **Add Reply to Metric Log**.

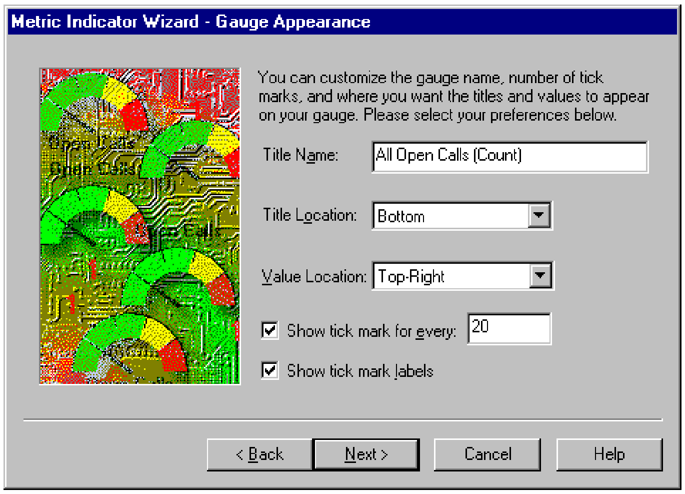
If you click on "yes," the **Record Status Change in Metric Log** box is automatically checked for you.

When you have specified an action for an event, the event will display a + (plus) sign to the left of its name. Clicking on the + symbol will display all actions defined for that event.

9. Click **Finish** to return to the **Create an Action** tab.

10. Click **Next**.

    The **Gauge Preferences** dialog box next lets you set characteristics of the gauge.



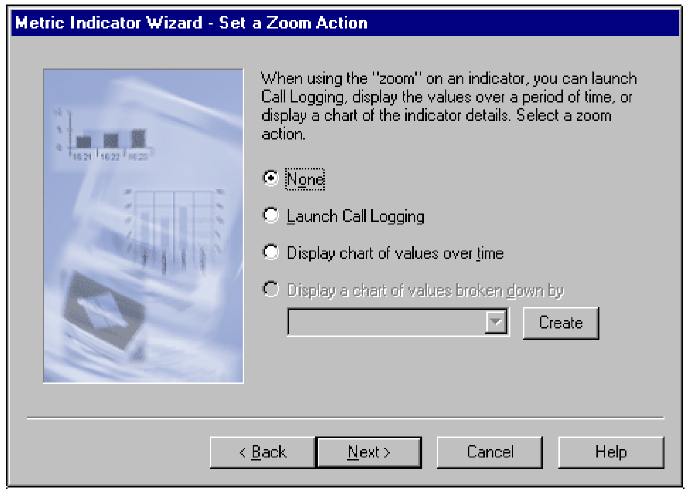
- **Title Name** – Enter a unique name to appear with the indicator gauge.
- **Title Location** – Select where the title will appear relative to the gauge. Choices are **None**, **Bottom**, and **Top**.
- **Value Location** – Lets you select where to display the value of the metric at the last query. Choices are **Bottom**, **Top**, **Top-Left**, and **Top-Right**.
- **Show tick mark for every** – Lets you specify how often tick marks will appear on the gauge.
- **Show tick mark labels** – Lets you specify whether tick marks should have their value displayed next to them.

11. Click **Next**. The **Set a Zoom Action** dialog box appears.

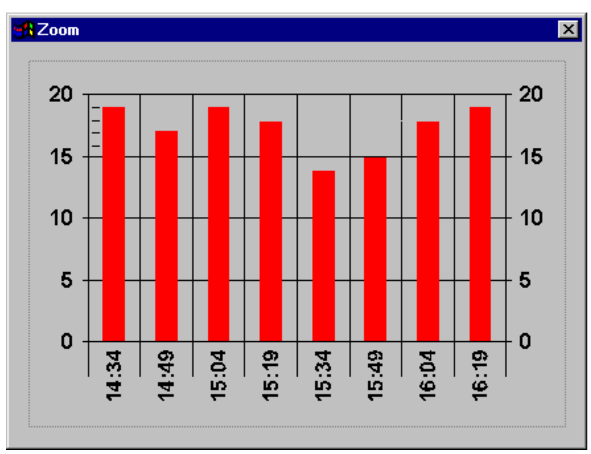
    Note: The Zoom Action feature is available with GMSS Metrics only. If you are creating new Sales Metrics, proceed to Setting Graph Preferences.

    Manager's Console lets you zoom in on any indicator in the event you want to see more detail. This feature can take you from the indicator, which displays information at a high level, to more detail with just a couple of clicks of the mouse. For example, if an indicator goes into the red zone, you may want to see the actual call record concerning that metric.

The **Set a Zoom Action** dialog box lets you set what will happen when you zoom in on an indicator. The radio buttons are explained below. **This feature is only available for GMSS users.**



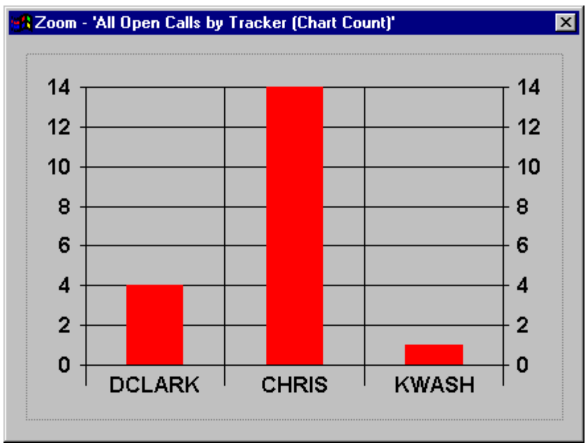
- **None** – Do nothing.
- **Launch Call Logging** – Launch Call Logging and display the Call Group log associated with the indicator.
- **Display chart of values over time** – Display the selected metric in a bar graph format that shows the values at specific sample times. The time is based on query frequency. A typical chart looks like the following:



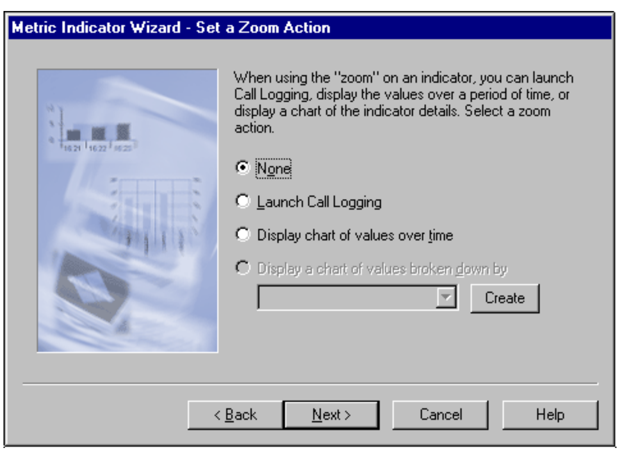
- **Display a chart of values broken down by** – Lets you display the value of a particular field from the Call Group. For example, you could select **Tracker** from the drop-down list to display a chart of **All Open Calls by Tracker**.

Note: This option is available only for User Defined Metrics and Call Groups. System metrics cannot use this option.

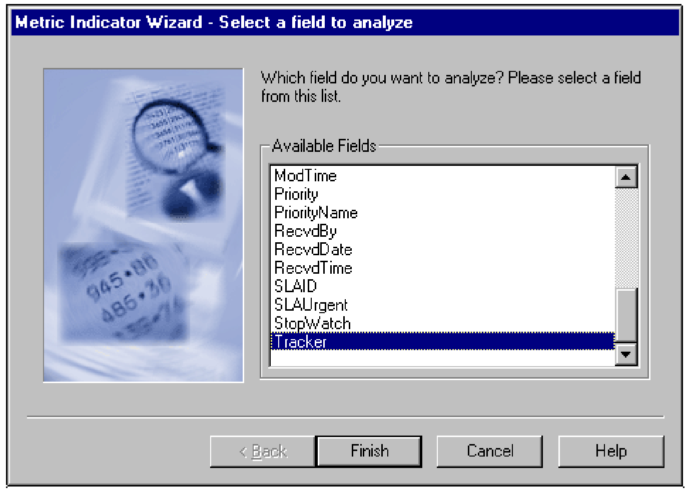
A typical chart looks like the following:



- To activate the **Display a chart of values broken down by** radio button, click the **Create** button next to the **Display a chart of values broken down by** field.

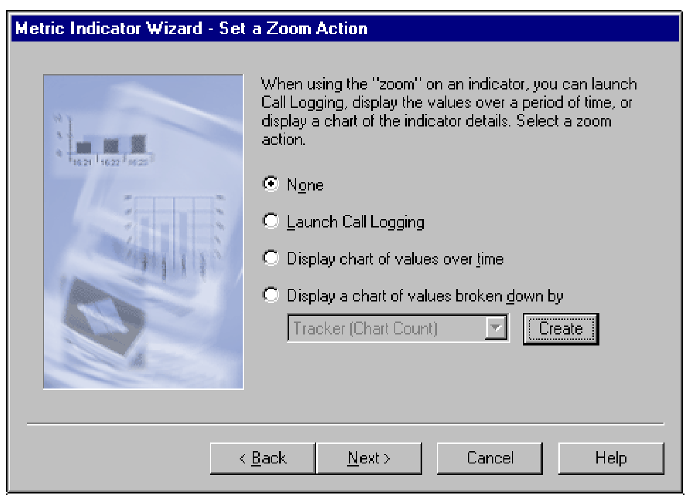


– The **Select a Field to analyze** dialog box appears.



– Select a field from the **Available Fields** window. Click **Finish**.

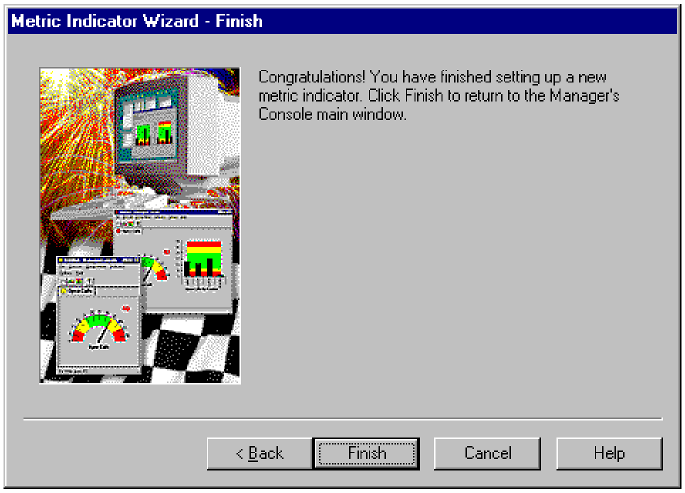
Note: To select additional fields, click the **Create** button and select another field from the list.



– Click the **Display a chart of values broken down by** radio button to activate the field list.

– Select a field from the list.

12. Select a Zoom action. **(GMSS Metrics only)**
13. Click **Next**. The **Finish** dialog box appears.

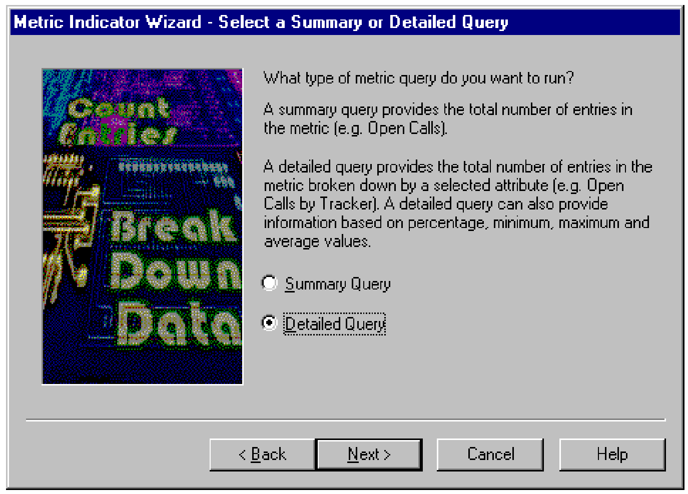


14. Select the **Finish** button to display the indicator you've just defined.

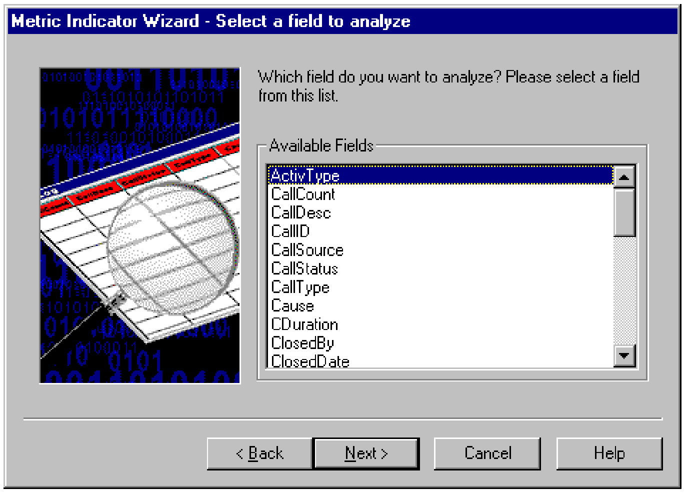
Displaying Specific Data Fields

This section covers a part of the Wizard used if you want to display specific fields within the metric (like Call Type, Priority, Time).

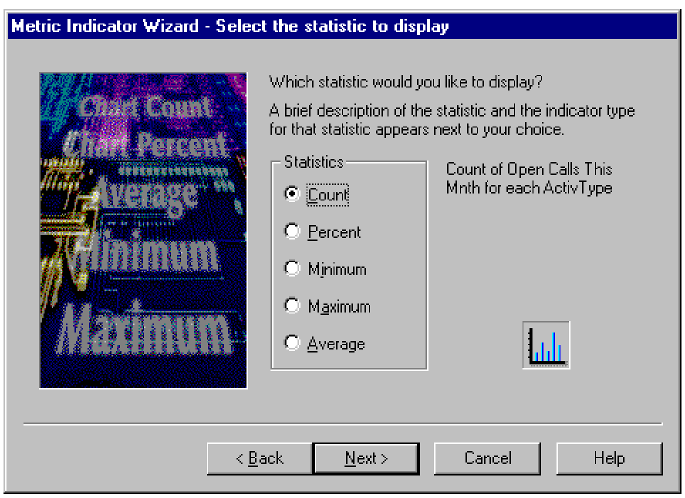
You will only see the following dialog boxes if you selected the **Detailed Query** radio button in the **Select a Summary or Detailed Query** dialog box (shown below) in the **Metric Indicator Wizard**.



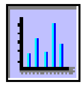
1. Select the **Detailed Query** radio button to display specific information from one of the fields in the Call Log. For example, select this button if you want the gauge or graph to display the number of Open Calls for a particular tracker or the number of Open Calls from a particular company.
2. Click **Next**. The **Select a field to analyze** dialog box appears.



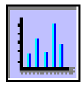
3. Select a field from the **Available Fields** window. This window displays all the fields for the selected Call Group.
4. Click **Next**. The **Select the statistic to display** dialog box appears.



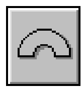
This dialog box lets you select the form (graph or gauge) the indicator should take as well as the type of statistic. The first two statistic types will display in graph form, while the last three will display in gauge form. The small window to the right of the **Statistics** box shows you the type of display as you click on the **Statistics** radio buttons.



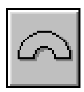
Count – Bar graph display with the total number of entries displayed by the 'break-down' field. For example, if you choose **Priority** as the 'break-down' field, the graph will display the number of calls in each priority.



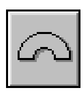
Percent – Bar graph display with the percentage of entries. For example, if you choose **Priority** as the 'break-down' field, the graph will display each priority as a percentage of the total number of calls.



Minimum – Gauge display that shows the minimum number of entries for the chosen 'break-down' field. For example, if you choose **Priority** as the 'break-down' field, the graph will display the minimum number of calls for each priority.



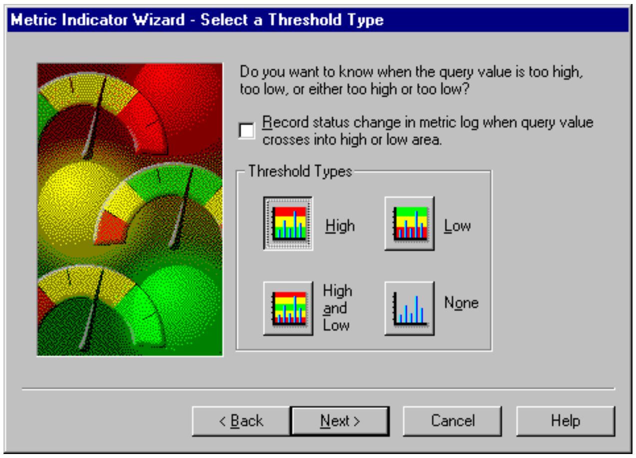
Maximum – gauge display that shows the maximum number of entries for the chosen 'break-down' field. For example, if you choose **Priority** as the 'break-down' field, the graph will display the maximum number of calls for each priority.



Average – gauge display that shows the average number of entries for the chosen 'break-down' field. For example, if you choose **Priority** as the 'break-down' field, the graph will display the average number of calls for each priority.

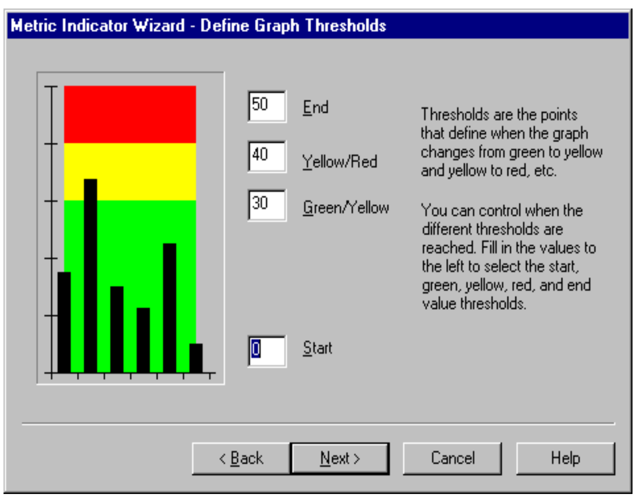
5. Click on a radio button in the **Statistics** window to select a statistics type.
6. Click **Next**. The **Select a Threshold Type** dialog box appears.

Note: If you selected a statistic that displays as a gauge, the four **Threshold Types** graphics in the dialog box will appear as gauges.



7. Select a **Threshold Type**.
8. Click **Next**. The **Define Graph Thresholds** dialog box appears.

Note: If you selected a statistic that displays as a gauge, the **Define Gauge Thresholds** dialog box appears.



9. Enter values for the thresholds, **Yellow/Red**, **Green/Yellow**, **Start**, and **End**. Click **Next**.

   At this point, you are returned to the **Create an Action** dialog box in the **Metric Indicator Wizard**.

Manager's Console

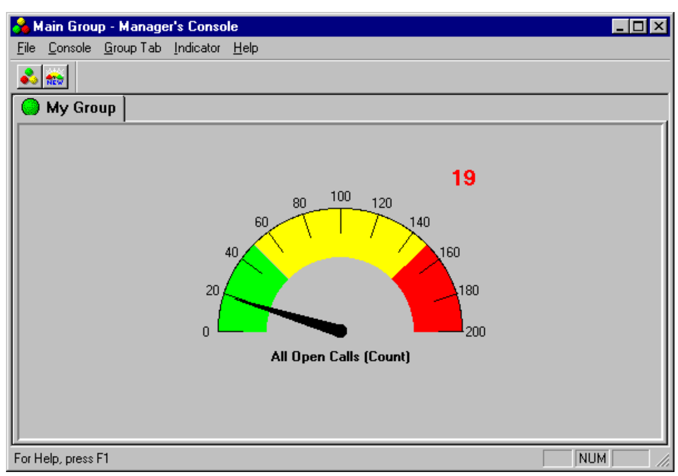
Chapter 3

Modifying an Existing Indicator

In this section, we'll demonstrate how to modify a metric indicator's properties. The process is simple and straightforward, and will give you the tools to modify an indicator without using the Metric Indicator Wizard.

This section also shows you how to define an action which Manager's Console will initiate when a threshold (green/yellow, yellow/red) is crossed.

Use the indicator created in the first section.

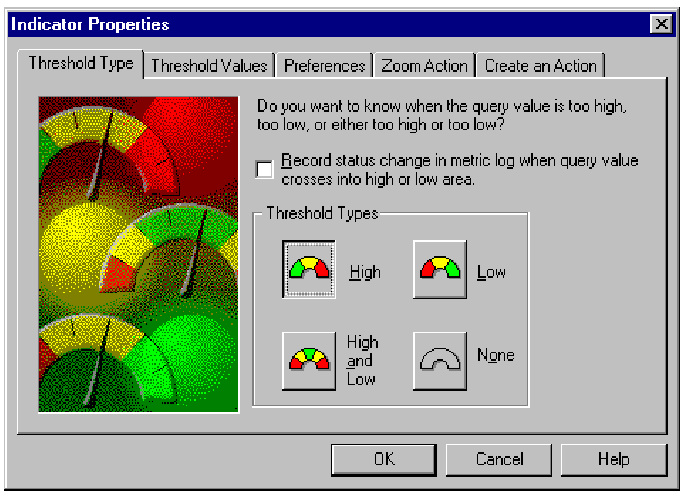


Setting the Zoom Characteristics

Zoom lets you 'drill down' from an indicator to get more detailed information with just a few mouse clicks.

1. Move the cursor to any part of the metric indicator and click the right mouse button.

2. From the drop-down menu, select **Properties**. You can also select **Indicator>>Properties** from the menu bar. Either action will display the **Indicator Properties** dialog box, shown below.



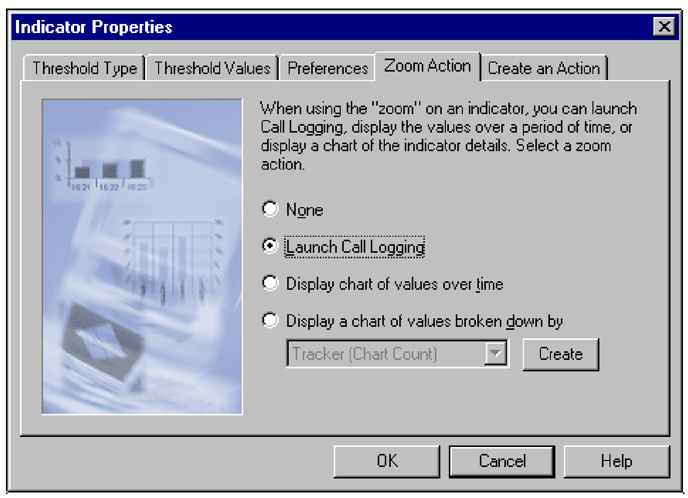
Note: The **Create an Action** tab appears only when you select **High**, **Low**, or **High and Low** in the **Select a Threshold Type** dialog box in the **Metric Indicator Wizard** or the **Threshold Type** tab in the **Indicator Properties** dialog box. If you select **None**, only four tabs display.

Each tab in the **Indicator Properties** dialog box deals with a different aspect of the metric indicator.

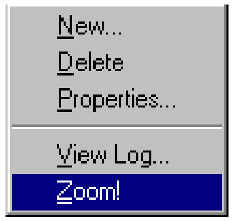
- **Threshold Type** – Select threshold types and whether to record threshold crossings in the Metric Log.
- **Threshold Values** – Set thresholds and minimum/maximum values for your gauge or graph.
- **Preferences** – Set preferences for display characteristics such as title name and location, value location, and tick marks.
- **Zoom Action** – Select what will happen when you zoom in on a metric indicator.(GMSS Metrics Only)
- **Create an Action** – Define the action Manager's Console will take when a threshold is crossed.

To Set the Zoom

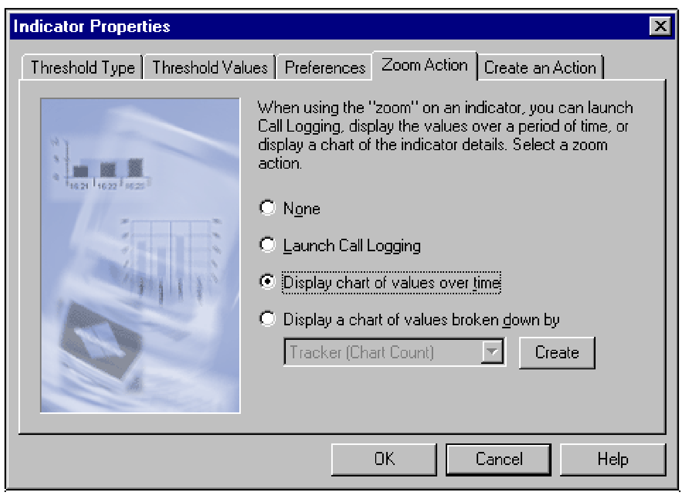
1. Select the **Zoom Action** tab.



2. Click on the **Launch Call Logging** radio button.
3. Click **OK** to close the dialog box and redisplay the indicator.
4. Click on the gauge with the right mouse button. This displays the following menu.



5. Select **Zoom** from the menu. Manager's Console will launch Call Logging and display the log of **All Open Calls**.
6. Close the **Call Log**.
7. Click on the indicator again with the right mouse button and select **Properties** from the menu. The **Indicator Properties** window appears.



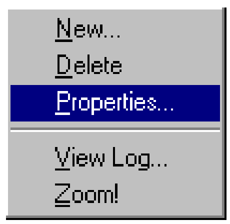
8. Select the **Zoom Action** tab and choose the **Display chart of values over time** radio button.
9. Close the **Indicator Properties** window by clicking **OK**.
10. Click on the gauge again with the right mouse button and select **Zoom** from the menu. Notice that Manager's Console now displays the value of **All Open Calls** at each query point in time in bar graph format. The longer you run, the more sample values will be displayed in the graph.

Setting Threshold Actions

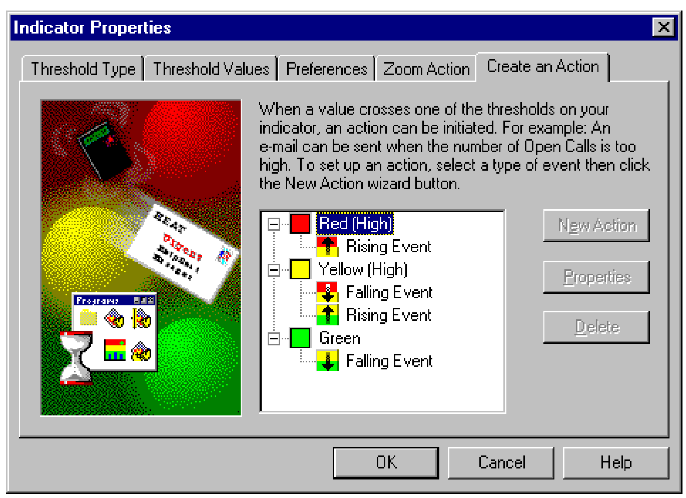
Another important feature of Manager's Console is its ability to let you define an action to take when a metric indicator threshold is crossed. For example, you may want to be notified (or have a member of your team notified) if the total number of incoming calls exceeds a pre-defined number. Manager's Console can notify you (or someone else) by sending an e-mail message. In this section, we'll show you how to define the action Manager's Console will take.

First, we'll need to tell Manager's Console the threshold on which to take action.

1. Click on the indicator gauge with the right mouse button and select **Properties** from the menu.



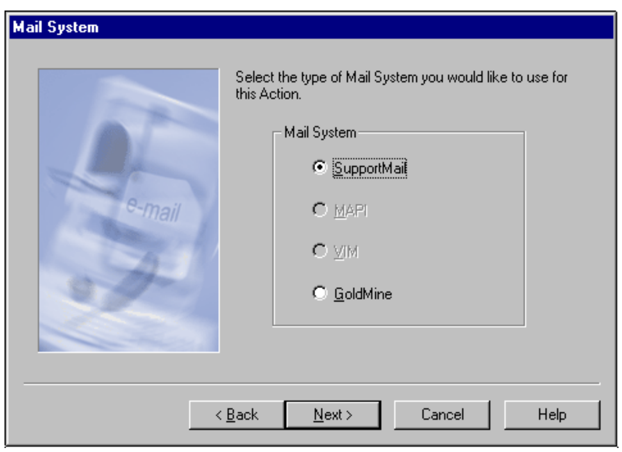
The **Indicator Properties** dialog box appears.



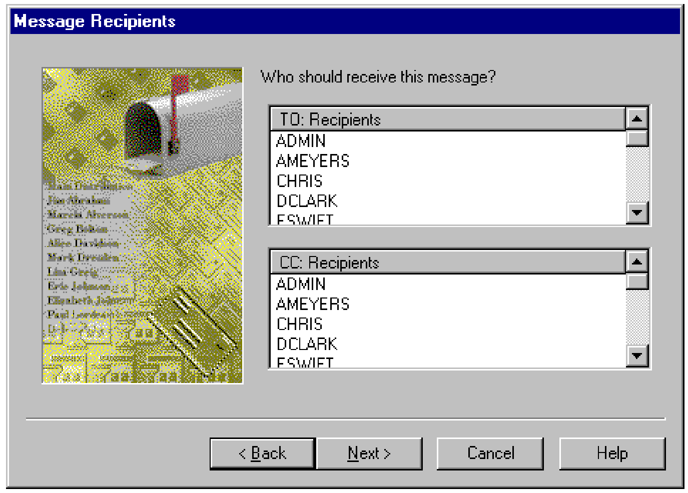
2. Select the **Create an Action** tab from the dialog box.
3. Click on the **Rising Event** item under **Red (High)**. This tells Manager's Console to react when the value is rising through the threshold between yellow and red (the graphic to the left of each event displays the threshold).

4. Click on the **New Action** button to the right of the window. This starts a wizard that lets you define an action that Manager's Console will take when the indicator crosses this threshold. The **Enter Action Name** dialog box appears.

5. Enter a name for the action. This name should be descriptive of the action (such as e-mail to Karen) since it will appear as the action in the **Create an Action** tab.
6. Select **Next**. The **Mail System** dialog box appears.

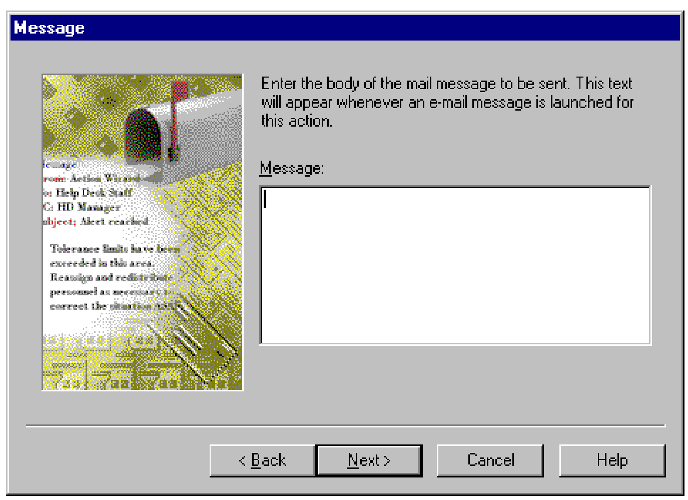


7. Select the **Support Mail** radio button. This tells Manager's Console to use the Support Mail system to send the message.
8. Select **Next**. The **Message Recipients** dialog box appears.



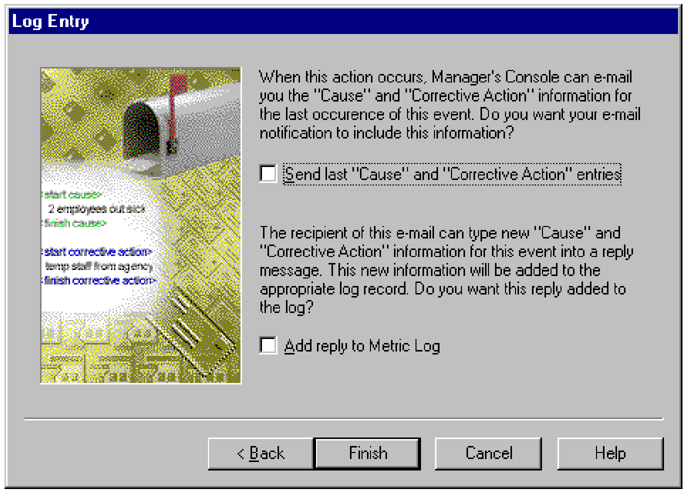
9. Select a name from the **TO: Recipients** window. Since this is the GMSS mail system, the names in the address list are derived from your GMSS system.

10. Select **Next**. The **Message** dialog box appears.

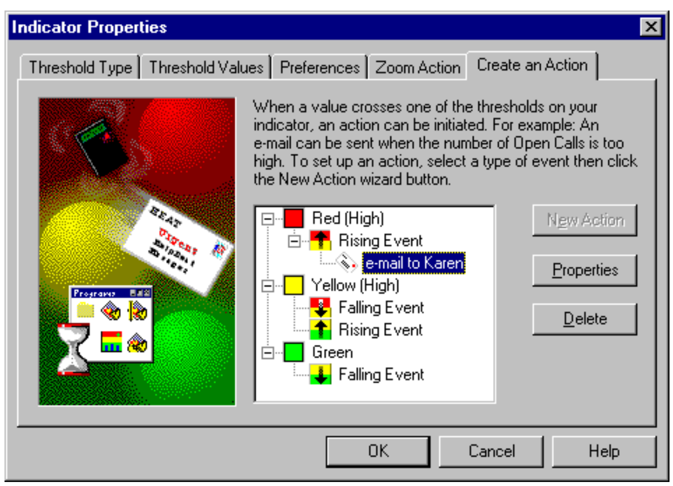


11. Enter the text of the message you want to send in the **Message** window. This is the text that will display in the e-mail that is triggered when the indicator crosses the threshold.

12. Select **Next**. The **Log Entry** dialog box appears.



13. The two check boxes in this screen let you append the **Cause** and **Corrective Action** information from the Metric Log onto the message you send, as well as letting the recipient send the **Cause** and **Corrective Action** information back to the Metric Log with their reply. Because there is no Metric Log for this example, we won't check either of these boxes.
14. Select **Finish** to return to the **Create an Action** dialog box.



15. Notice that the **Create an Action** dialog box now displays an action below the **Rising Event** item under **Red (High)**. This means that when the metric indicator crosses the threshold from yellow to

red, the e-mail message you defined will be sent to the specified person or persons.

Using the Metric Log

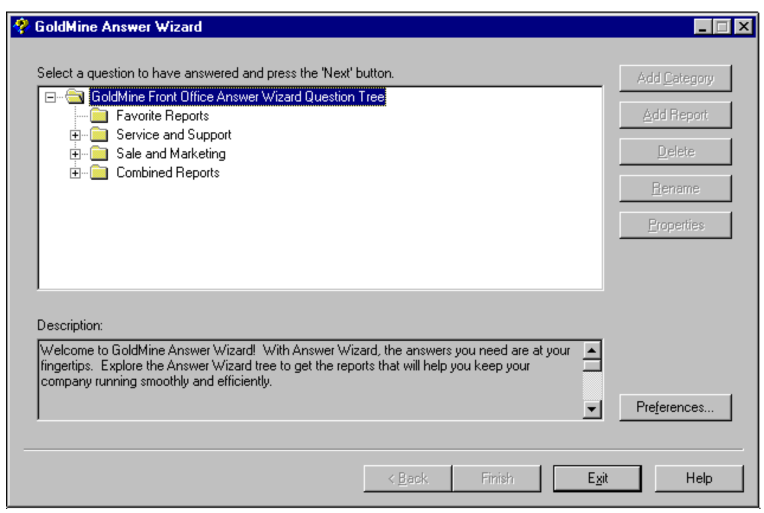
The Metric Log in Manager's Console gives you a stored record of all transitions that occur in indicators. It also includes sections that let you enter the cause of the problem and corrective action taken. This is especially useful to new managers, since they can review the causes and corrective actions taken on previous occasions. For an experienced manager, the Metric Log is the source of statistical information such as:

- How often a metric has gone into the red zone.
- Causes of recurring problems.
- Justification for additional resources.

Reporting

The Manager's Console Metric Log can automatically capture changes in Indicator status. The sum of this information provides managers with the ability to delegate responsibility, ensure accountability, justify resource requirements, and foster continuous process improvement.

Predefined Manager's Console reports, using information from the Metric Log can be found in the Answer Wizard product.



Answer Wizard provides a "question-tree" environment showing the different categories of reports and a description of the information contained in each report. You see which reports are available, not only to answer your present question, but other related questions that you may want to ask. This “consultant in a box” approach coaches you into asking the right questions, and helps you find the answers to those questions.

Examples of Answer Wizard options for Manager’s Console:

Manager’s Console

Show me events for all metrics

List by order of occurrence
List by metric
Graph by hour of day
Graph by day of week
Graph by day
Graph by week
Graph by month
Summarize how much time each metric spent in each state

Compare frequency and duration between metrics

Compare metrics by total duration in Red
Compare metrics by how often each entered Red
Compare metrics by total duration in Yellow without reaching Red
Compare metrics by how often each entered Yellow but not Red
Compare metrics by total duration in Yellow or Red
Compare metrics by how often each entered Yellow or Red

Show me events for a specific metric

List by order of occurrence
Graph by time of day
Graph by day of week
Graph by Day
Graph by Week
Graph by Month
Show me how much time a metric spent in each state

The Answer Wizard reports have assumptions about fields contained in the GoldMine database. Consequently, if your current database does not have those fields, you will want to add them in order for the report to run properly.

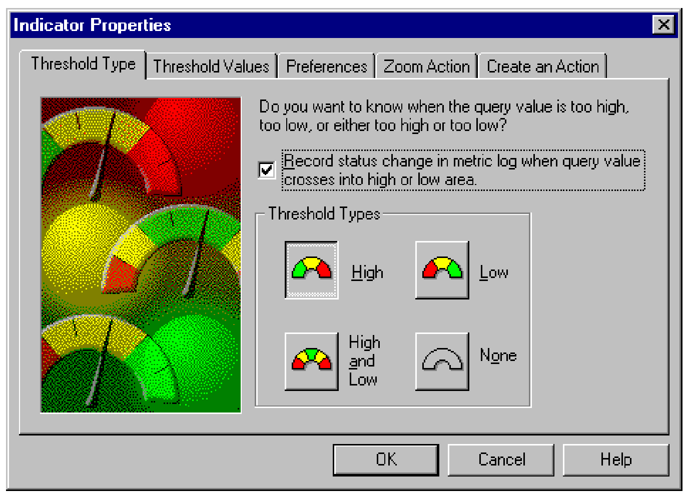
If you would like more information about Answer Wizard, please contact your local sales representative.

Enabling the Metric Log

To enable the Metric Log:

1. Click on the indicator gauge with the right mouse button and select **Properties** from the drop-down menu.

The **Indicator Properties** dialog box appears.

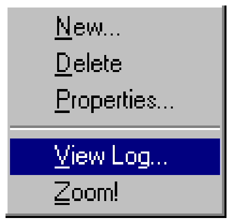


2. Click on the **Threshold Type** tab and select the **Record status changes in metric log when query value crosses into high or low area** check box. This tells Manager's Console to record any threshold crossing event in the Metric Log.

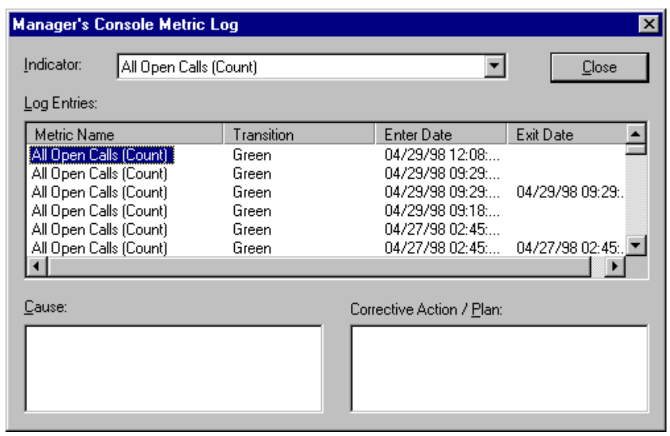
Viewing/Using the Metric Log

To view or use the Metric Log:

1. Click on the indicator gauge with the right mouse button and select **View Log** from the menu.



The **Manager's Console Metric Log** dialog box appears.



2. Select the metric you want to display from the **Metric** drop-down list. Manager's Console displays all the transitions that have occurred in the **Log Entries** window.

3. Select the log entry you are concerned about in the **Log Entries** window.

   The window contains a log of all transitions (i.e., every time the selected metric indicator crosses a set threshold) for the selected metric. Also logged are the date the transition crossed the threshold and the day it crossed the threshold in the opposite direction. Note that entries are made in this log by Manager's Console only if you have enabled logging.

4. You can enter text into the **Cause** and **Corrective Action/Plan** windows for each log entry.

- **Cause** – This window lets you enter text concerning the cause of the selected threshold crossing. This information can be especially helpful for future reference, particularly if the incident should occur again. The **Cause** can also be updated automatically by e-mail. Each time that log entry is selected in the future, the **Cause** and **Corrective Action** windows will display the information. The information in either of these windows can be updated at any time.
- **Corrective Action/Plan** – This window lets you enter text concerning the corrective action taken or plan instituted to prevent the problem in the future. As with the **Cause** window, this information is helpful should the problem occur again, especially if the manager is new and unfamiliar with previous events. This window can also be updated automatically by e-mail.

Manager's Console

Chapter 4

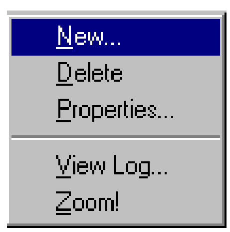
Creating Multiple Indicators and Groups

Displaying Multiple Indicators

You can add a gauge or graph to Manager's Console at any time. You can also change the appearance of multiple indicators by specifying the number of rows in which the indicators will be displayed.

To add an indicator:

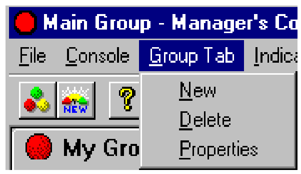
1. Click anywhere in the indicator area with the right mouse button. A menu appears.



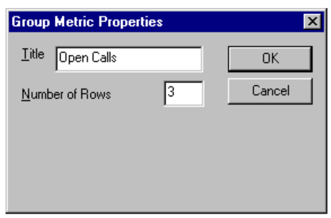
2. Select **New** from the menu.
3. Manager's Console will start the Metric Indicator Wizard, to guide you through defining the indicator. Simply fill in the fields in each dialog box to set the characteristics you want the indicator to have.

To change how indicators are displayed on a tab:

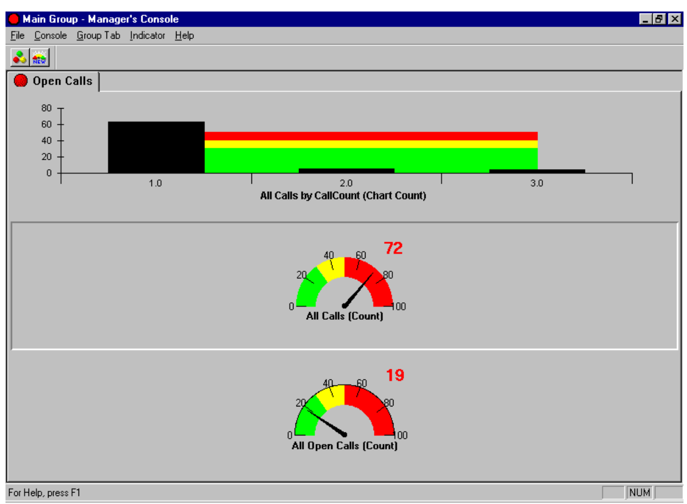
If you have a number of indicators and would like to display them in more than one row:



1. Select **Group Tab>>Properties** from the menu bar. The **Group Metric Properties** dialog box appears.



2. Enter the number of rows you want in the **Number of Rows** box.
3. Select **OK**. Notice that the display has changed to display the metrics in the number of rows you entered.

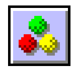


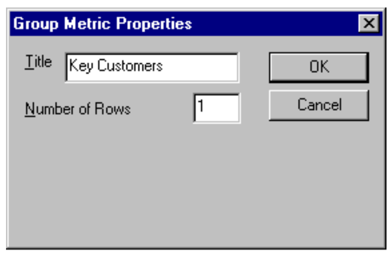
Grouping Indicators into Tabs

Manager's Console lets you group indicators into tabs, so you can place metrics of the same kind together. For example, you may want to see the number of open calls for your key customers together so you can view them all at a glance. In this last section, we'll show you how to create tabs and how to view their status.

Creating a New Tab

To create a new tab:

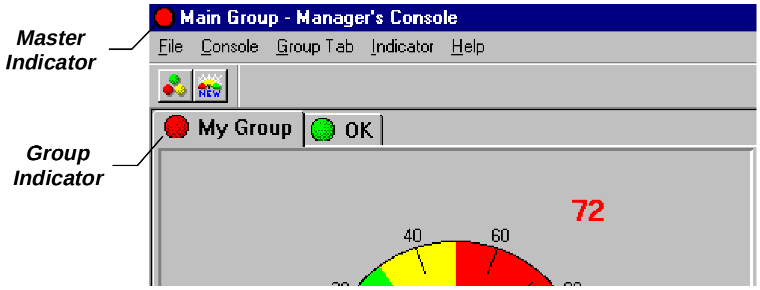
1. Select the **New Tab**  button from the toolbar. This brings up the **Group Metric Properties** dialog box.



2. Change the **Title** field to the new name (in this example, we've entered "Key Customers").
3. Click on **OK**.
4. Notice that a new tab entitled **Key Customers** is now displayed in Manager's Console. Each tab has an icon to the left of the name that shows the status of the indicator metrics in that tab. For example, if the icon is yellow, it means that one of the metrics in that tab is in the yellow zone. If the icon is flashing, it means that more than one of the metric indicators is in the yellow zone. This feature allows you to monitor metrics in those tabs, even if the tab itself is not visible (i.e., not on top).

Using the Group and Master Indicators

The Group Indicator lets you see the worst case status of all metric indicators in one tab. As an example, if you have three indicators in a tab, with two of them in the green section while one has crossed from green into yellow, the Group Indicator will display yellow (the worst case of all indicators).



The Master Indicator displays the worst-case condition of all tabs. This is particularly useful when the Manager's Console window is minimized (running in background). The worst-case of all indicators will be displayed in the Windows task bar.

Manager's Console

Chapter 5

Using the SQL Builder

Using the SQL Builder to Define a Call Group

The SQL Builder lets you define a Call Group using a combination of GoldMine tables, their fields, and SQL operators. Typically, the only time you would use the SQL Builder is if there is not a standard Call Group that meets your needs.

Tables are essentially a way of relating database information of similar type. For example, one of the tables is Call Types, which contains information about all the type of each call logged in Service and Support.

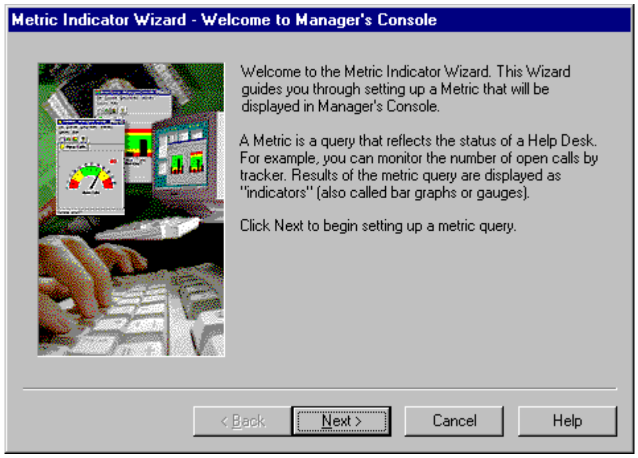
The fields within this table are specific database entries (e.g., Call Type, Cause, Priority).

To use the SQL Builder:

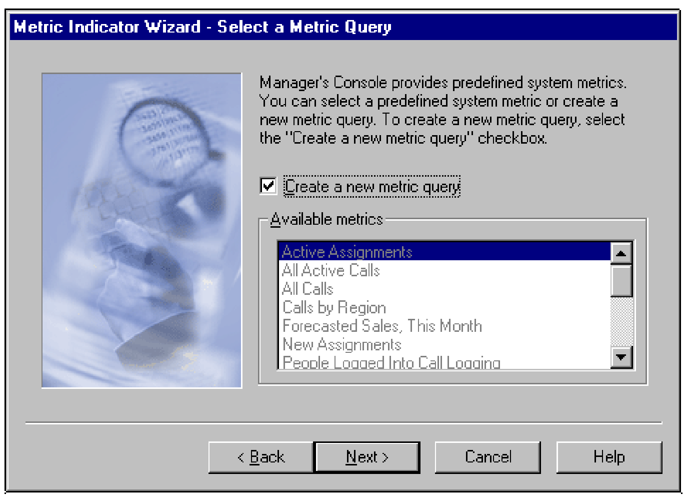
1. Select the **New Indicator** button from the toolbar. You can also select **Indicator>>New** from the menu bar or click on any indicator with the right mouse button.

   The **Welcome to Manager's Console** dialog box introduces the

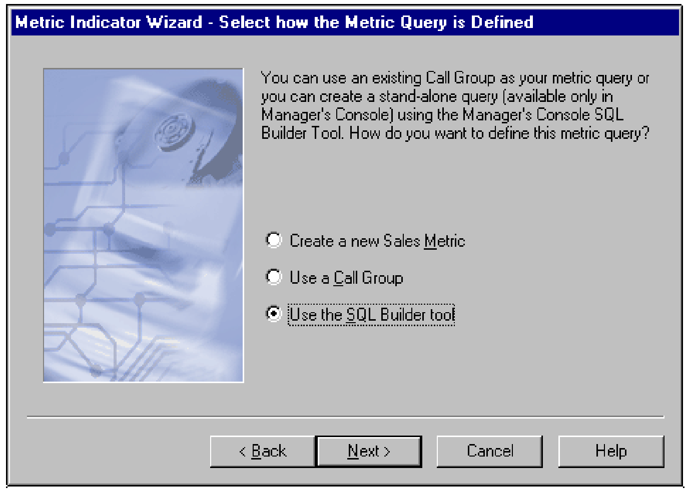
Metric Indicator Wizard.



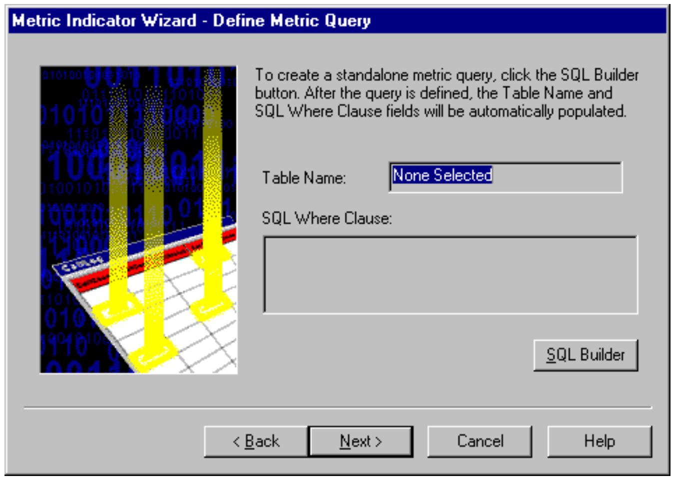
2. Click **Next**. The **Select a Metric Query** dialog box appears.



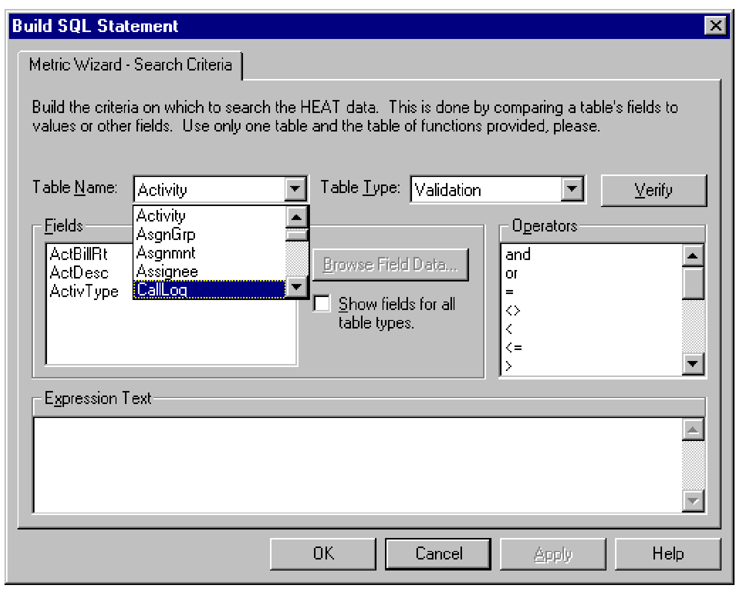
3. Check the **Create a new metric query** box.
4. Click **Next**. The **Select How the Metric Query is Defined** dialog box appears.



5. Select the **Use the SQL Builder tool** radio button. The **Define Metric Query** dialog box appears.



6. Click on the **SQL Builder** button. The **Build SQL Statement** dialog box appears.



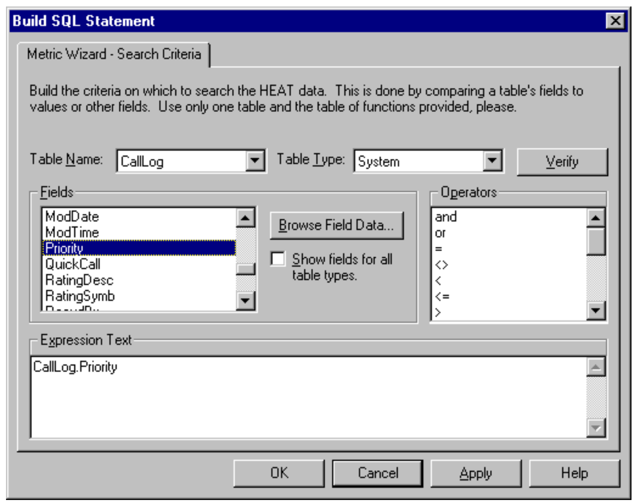
7. Select a **Table Name** (for example, **CallLog**) from the drop-down list. This drop-down list contains all available tables in this data source.

Note: The current version of Manager's Console does not allow for using more than one table in a query statement.

Suppose you are interested in seeing information on high priority calls received from specific customer. You can construct a simple SQL statement using the two fields **Priority** and **CustID**. The SQL statement is:

CallLog.Priority = '1' and CallLog.CustID = '35513'

We will use this example to take you through the rest of the SQL Builder fields.

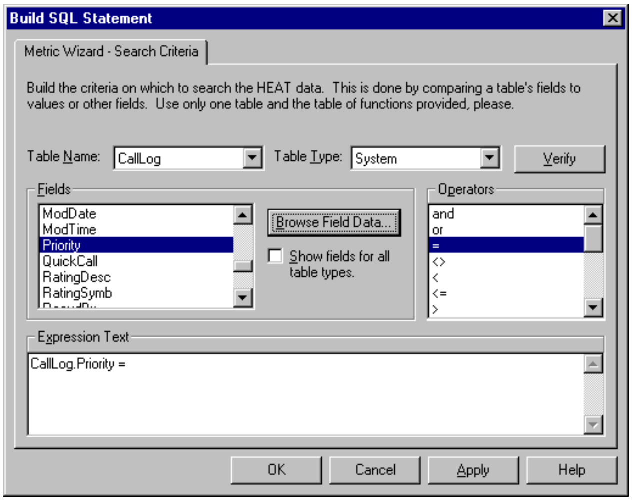


8. Double-click on **Priority** in the **Fields** window. When you double-click on the field, it appears in the **Expression Text** window. The **Expression Text** window displays the SQL statement you are building. You'll notice that the field is described in the format

TableName.FieldName

or

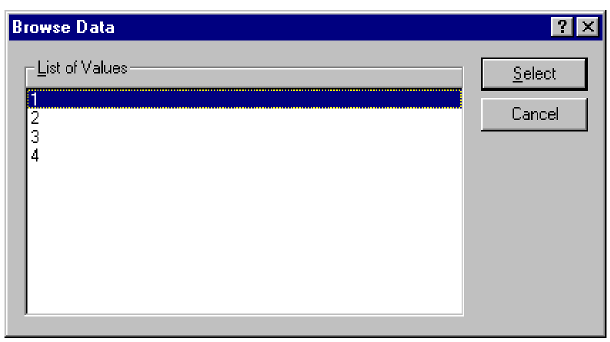
CallLog.Priority

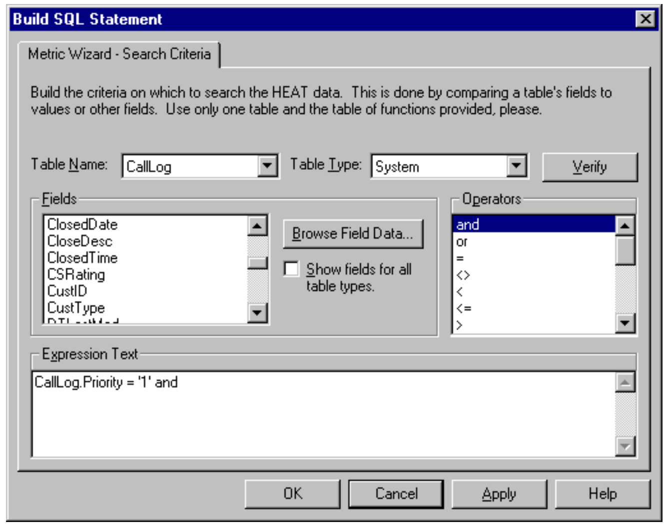


9. Next, double-click on the SQL operator in the **Operators** window. For this example, double-click on **=** (the equal sign). Notice that **=** is added to the statement in the **Expression Text** window.

10. Enter a value (i.e., '1' (be sure to include the single quotation marks)) or click the **Browse Field Data** button and select a value from the **Browse Data** dialog box.

    You can use the **Browse Field Data** button to look at the actual data for any field in the **Fields** window. If the button is grayed, it means there is no data available.

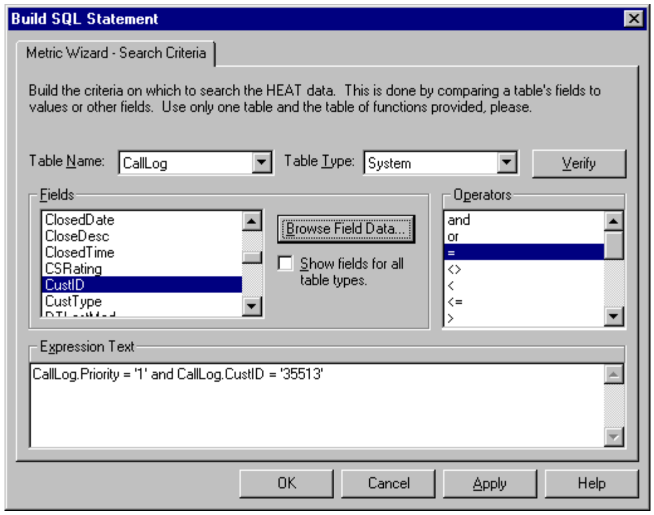




11. Next, double-click on the field **and** in the **Operators** window.
12. Double-click on the field **CustID** in the **Fields** window.
13. Double-click on **=** (the equal sign).
14. Enter a value (i.e., '35513' (be sure to include the single quotation marks)) or click the **Browse Field Data** button and select a value from the **Browse Data** dialog box.
15. To verify that the syntax of the statement is correct, click the **Verify** button in the **Build SQL Statement** dialog box. If the statement executes correctly, you will see an advisory dialog box. If the statement is incorrect, a dialog box will provide information about the error.

Note: Don’t forget to include the **and callstatus<>'closed'** statement where needed.

Note: If you are querying all calls in the system, consider using date ranges to limit your search criteria.



16. When you have completed the SQL statement, select the **Apply** button at the bottom of the SQL Builder dialog box and click **OK**. This takes you back to the **Metric Indicator Wizard** dialog box.

Manager's Console

Chapter 6

Administrator Section

Setting Up Manager's Console

The following high level steps provide an overview for your initial Manager's Console setup. Detailed information for installing Manager's Console is located in the beginning of this manual.

1. Decide which PC will run as the Manager's Console server.
2. Install Manager's Console to that machine.
3. Launch Manager's Console.
4. Create your Manager's Console mail distribution list. (See ***Creating a Mail Distribution List*** in the ***For the Administrator*** section of this chapter.)
5. Install Manager's Console on client machines.
6. Create your metric indicators.

Note: You will receive more consistent, accurate data if you start Manager's Console and leave it running. Shutting down the program and restarting it frequently may result in inaccurate data.

Note: Manager's Console is not supported by client workstations running Windows NT 3.51.

For the Administrator

Client/User IDs

The following are items concerning IDs and passwords for Manager's Console.

- If the user is logged on to Goldmine Service and Support or GoldMine Sales and Marketing, they must supply their User ID and password when logging in to Manager's Console.

Saving Files

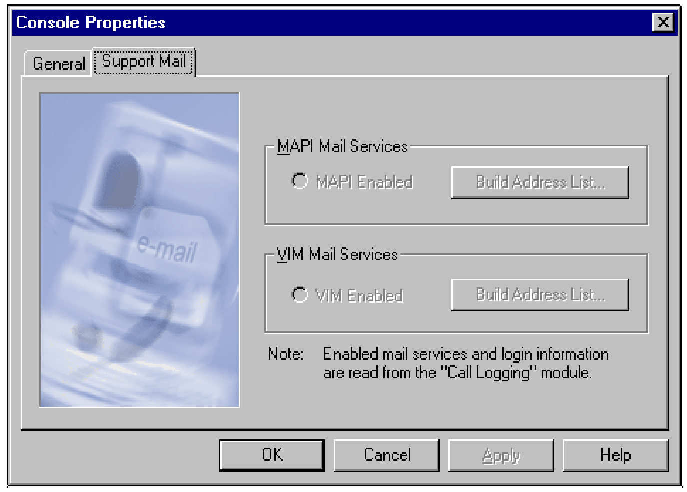
When a user saves changes from the **File>>Save** menu, the server stores the changes to the Main Group file. These changes can be seen by all users, regardless of whether the file was saved from a client PC or the server.

Note: When using Manager's Console in a multi-user environment, it's important to note that any user can make changes to the Manager's Console Main Group. Because Manager's Console resides on the server, the **Save** option will save the most recent changes and overwrite any other previously saved information.

Creating a Mail Distribution List

If you are running a VIM or MAPI-enabled mail system in GMSS or GMSM, use the following steps to create your Manager's Console mail distribution list. These are the individuals that you will want to notify when certain actions are initiated. (For information on enabling VIM or MAPI in GMSS or GMSM or creating Actions, see ***Setting Threshold Actions***.)

1. Launch Manager's Console.
2. If the Metric Indicator Wizard appears, click **Cancel** to exit.
3. Select **Console>>Properties** to display the **Console Properties** dialog box.
4. Click on the **Mail Settings** tab.



5. Click the **Build Address List** button to display your mail system's address book.
6. Select the e-mail addresses of individuals you want to add to your Manager's Console mail distribution list.
7. Click **OK.**

Viewing and Changing Manager's Console Group Setups via the Metric Administrator

The Metric Administrator in Manager's Console displays a dialog box from which you can:

- See all metrics defined for Manager's Console.
- View or change the properties of the metrics (except System Metrics).
- Add or delete metrics available to Manager's Console.

Launching Metric Administrator

To launch the Metric Administrator:

- Select **Console>>Metric Administration**. The **Metric**

Administrator window appears.

Viewing/Changing Group Setups

The Metric Administrator displays all Call Groups available as metrics to Manager's Console in a tree-directory format. There are four Call Group sections:

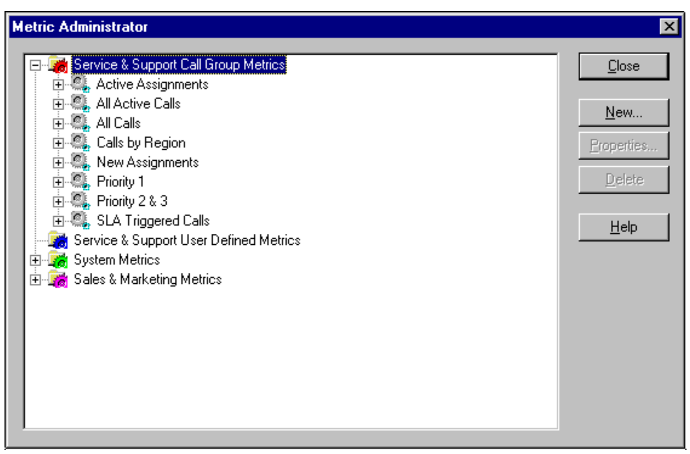
Service and Support Call Group Metrics – Metrics pre-defined in your GMSS system and selected for Manager's Console.

System Metrics – Metrics supplied for Manager's Console. You cannot add or delete System Metrics.

Service and Support User-Defined Metrics – Defined by the user with the SQL Builder. The SQL Builder lets a user define a Call Group using GMSS tables, fields, and SQL operators. The SQL Builder is part of the Metric Indicator Wizard, and is available to all users. Groups created this way are not available in GMSS.

Sales and Marketing Metrics - Metrics pre-defined in your GMSM system and selected for Manager's Console.

To View Call Groups Listed Under a Metric Query



Call Groups shown with a plus at the highest level in the **Group Metrics** or **User-Defined Metrics** are **Metric Queries**. Metric queries are those that can be further broken down into other, more detailed metrics. For example, the GMSS Group Metric, **All Calls** can be further broken down into **All Calls by CallType**, **All Calls by CustID**, **All Calls by Tracker**, etc.

To view a Call Group listed under a metric query, click on the plus symbol in the left column.

Defining a New Metric in Metric Administrator

The processes for adding a metric to the **Group Metrics** and to the **User-Defined Metrics** groups are slightly different. You can add a new metric to by selecting a Call Group from the list of available Call Groups. When adding a detailed metric to a metric query, the table is already defined, and you simply select the field you want to monitor. In the case of a **User-Defined Metric**, you must supply the table name and field(s).

Defining a new **User-Defined Metric** involves using the **SQL Builder** tool within Manager's Console. The **SQL Builder** lets you select a table and fields within that table. These fields can then be linked by SQL operators to create a new metric.

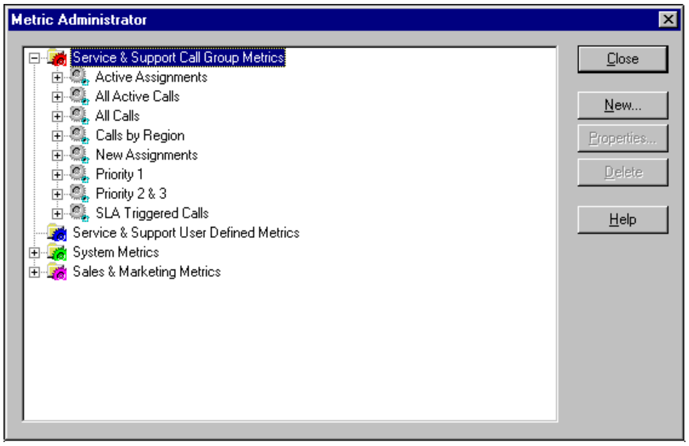
When you select the **New** button in Metric Administrator, a short series of wizard screens guide you through selecting the table and fields, which SQL operators to use (e.g., =, >, <>, etc.), naming and describing the new metric, and how often the table should be queried.

Note: You cannot add or delete metrics in the **System Metrics** group.

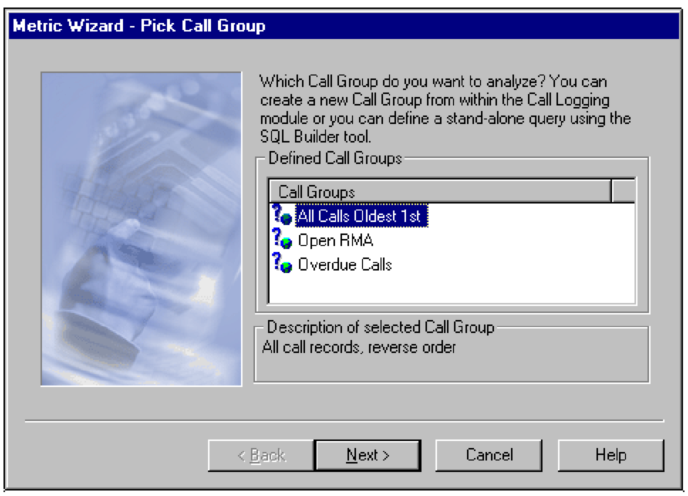
Note: Metrics added in the Metric Administrator window do not appear on the Group tab. To add the metric to the Group tab, use the Metric Indicator Wizard to define a gauge or graph for the metric.

To Add a New Call Group to the Group Metrics

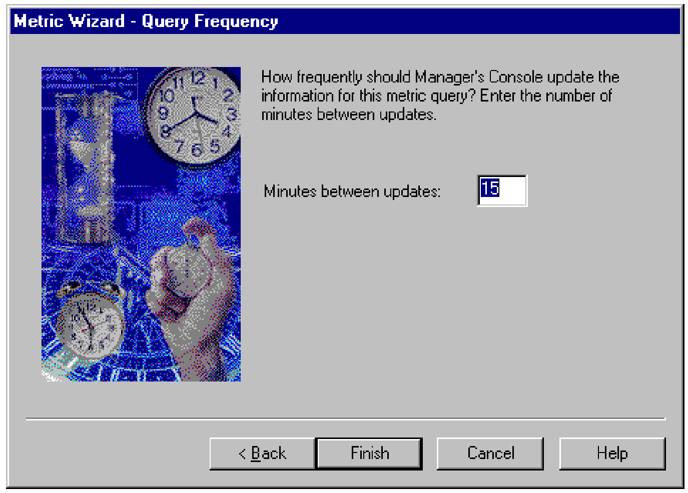
1. Select **Console>>Metric Administration>>Group Metrics.**



2. Click **New**. The **Pick a Call Group** dialog box appears.



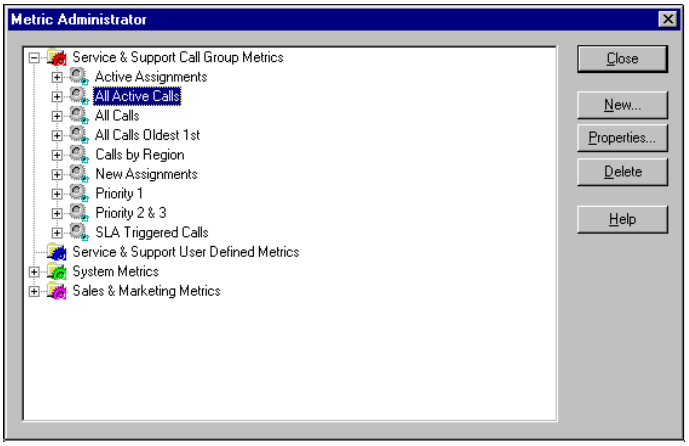
3. Select a Call Group (for example, **All Open Calls**) from the **Defined Call Groups** window. Select **Next**. The **Query Frequency** dialog box appears.



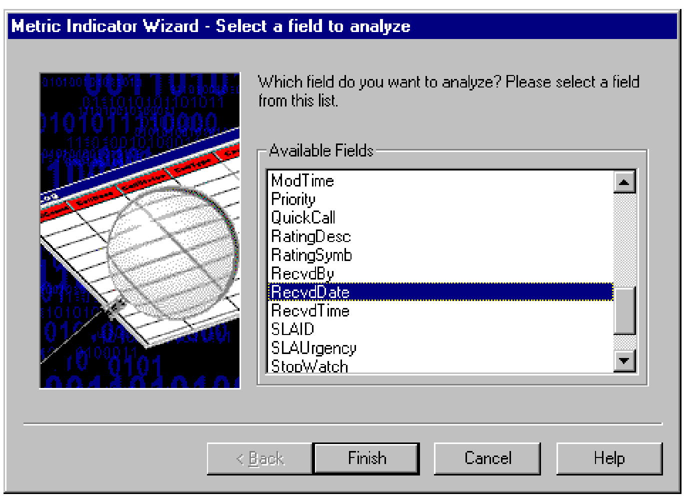
4. Enter a number to indicate how often you want Manager's Console to query the metric.
5. Click **Finish** to return to the **Metric Administrator** window.
6. To view a Call Group listed under a metric query, click on the plus sign in the left column.

To Define a New Metric for the Group Metric

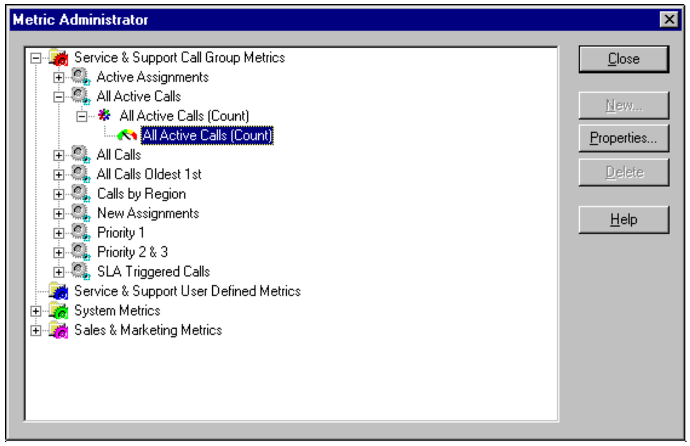
1. Select a metric query from Group Metrics. Metric queries are those that can be broken down further. For example, the metric query **All Active Calls** can be broken down into **All Active Calls by Count.**



2. Click **New**. The **Select a field to analyze** dialog box appears.



3. Select a field from the **Available Fields** window (for example, **RecvdDate**). The window contains a list of all the fields available for the selected metric query (in this example, **All Open Calls**).

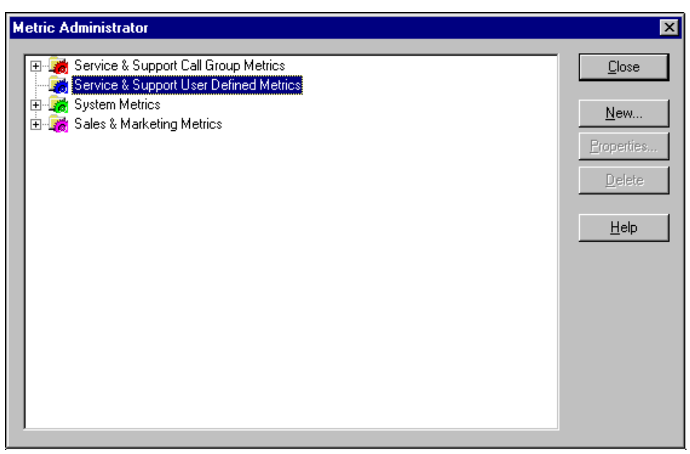


4. Click **Finish**. The new metric (**All Open Calls by RecvdDate**) will appear under the metric query (**All Open Calls**).

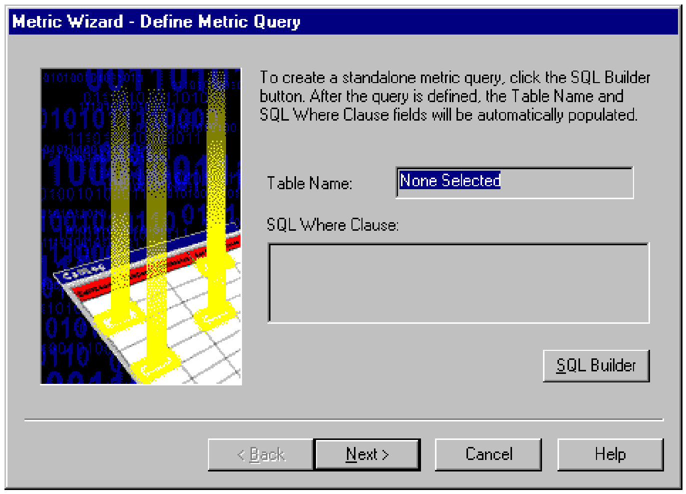
To Define a New Metric for the User-Defined Metrics Group

Note: Groups created with the SQL Builder tool are available in Manager's Console only. These groups are not available in Call Logging.

1. Select the **User-Defined Metrics** item in the **Metric Administrator** window.



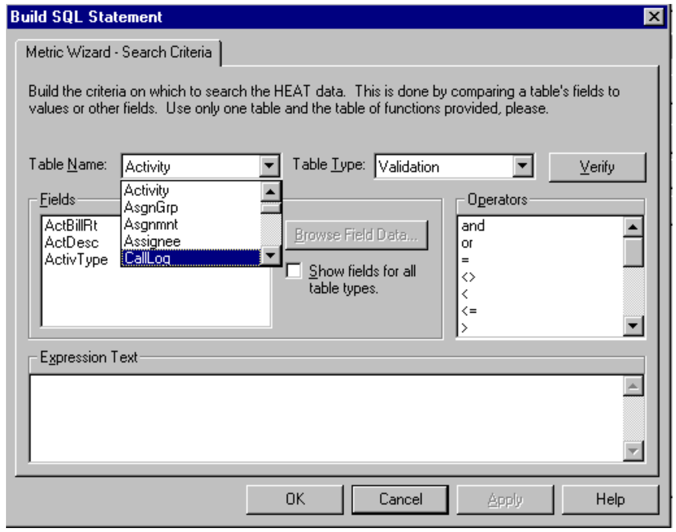
2. Click on the **New** button. A short series of wizard screens display to help you define the new metric using Manager's Console **SQL Builder** tool. The **Define Metric Query** dialog box appears.



Initially, there is no table or field information in the **Table Name** and **SQL Where Clause** fields. These fields are automatically populated after defining the query.

- **Table Name** – The name of the data table you want to query.
- **SQL Where Clause** – This window will contain the fields and any SQL operators you used to construct the query.

3. Select the **SQL Builder** button to define the table and fields you want to monitor. The **Build SQL Statement** dialog box appears.

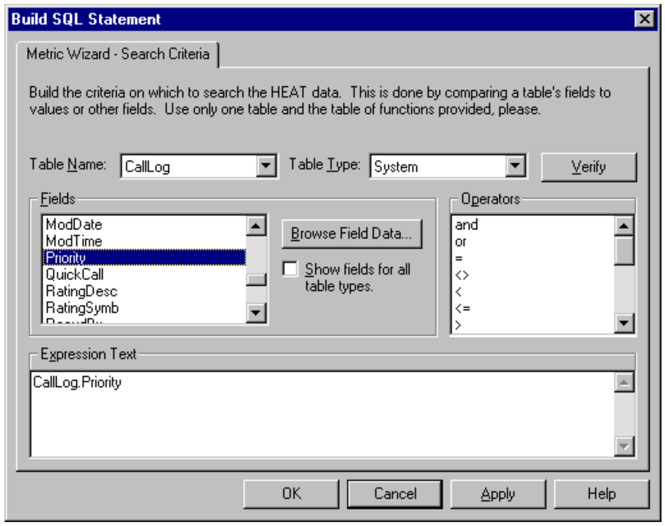


4. Select a **Table Name** (for example, **CallLog**) from the drop-down list. This drop-down list contains all available tables in this data source.

   For example, suppose you are interested in seeing information on high priority calls received from specific customer. You can construct a simple SQL statement using the two fields **Priority** and **CustID**. The SQL statement is:

   CallLog.Priority = '1' and CallLog.CustID = '35513'

   We will use this example to take you through the rest of the **SQL Builder** fields.

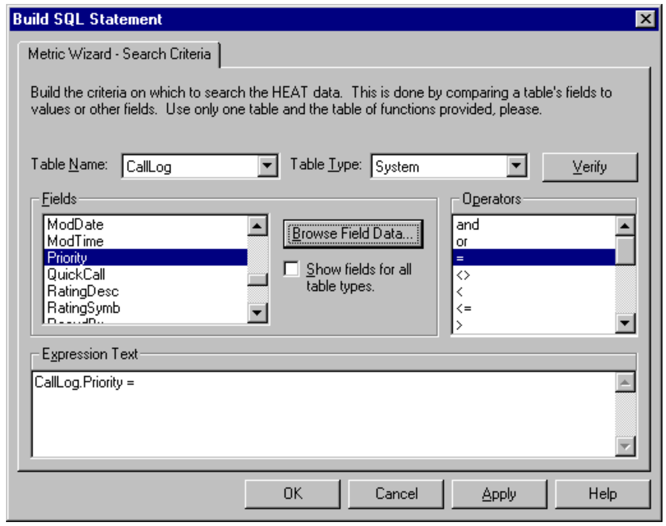


5. Double-click on **Priority** in the **Fields** window. When you double-click on the field, it appears in the **Expression Text** window. The **Expression Text** window displays the SQL statement you are building. You'll notice that the field is described in the format

   TableName.FieldName

   or in our example,

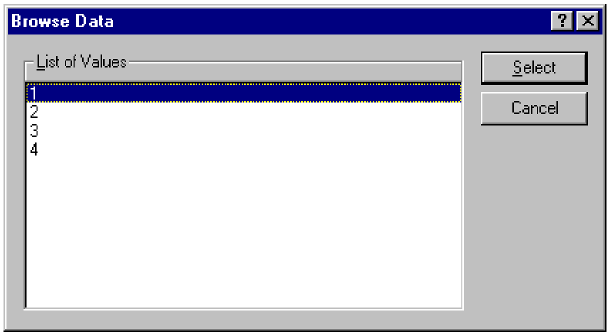
   CallLog.Priority

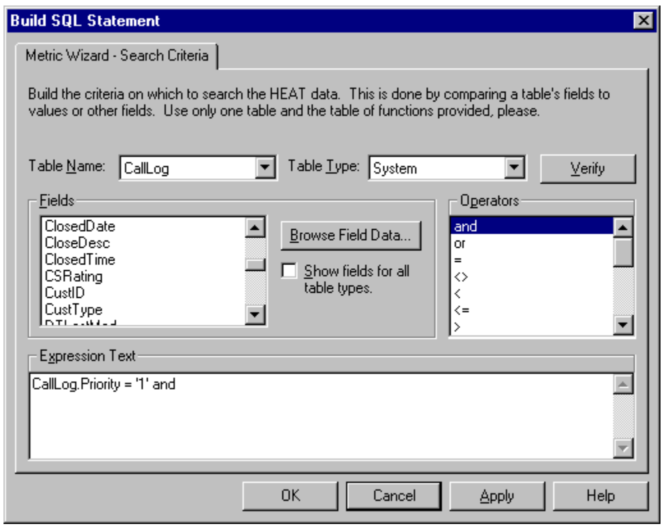


6. Next, double-click on the SQL operator in the **Operators** window. For this example, double-click on **=** (the equal sign). Notice that **=** is added to the statement in the **Expression Text** window.

7. Enter a value (i.e., '1' (be sure to include the single quotation marks)) or click the **Browse Field Data** button and select a value from the **Browse Data** dialog box.

   You can use the **Browse Field Data** button to look at the actual data for any field in the **Fields** window. If the button is grayed, it means there is no data available.





8. Next, double-click on the field **and** in the **Operators** window.

9. Double-click on the field **CustID** in the **Fields** window.

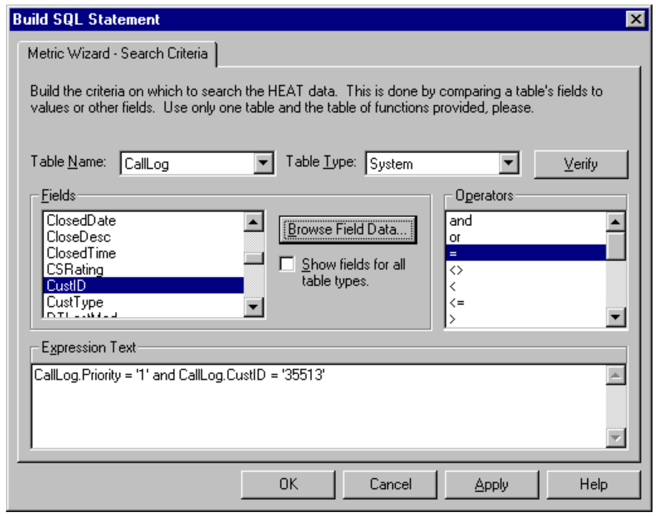
10. Double-click on **=** (the equal sign).

11. Enter a value (i.e., '35513' (be sure to include the single quotation marks)) or click the **Browse Field Data** button and select a value from the **Browse Data** dialog box.

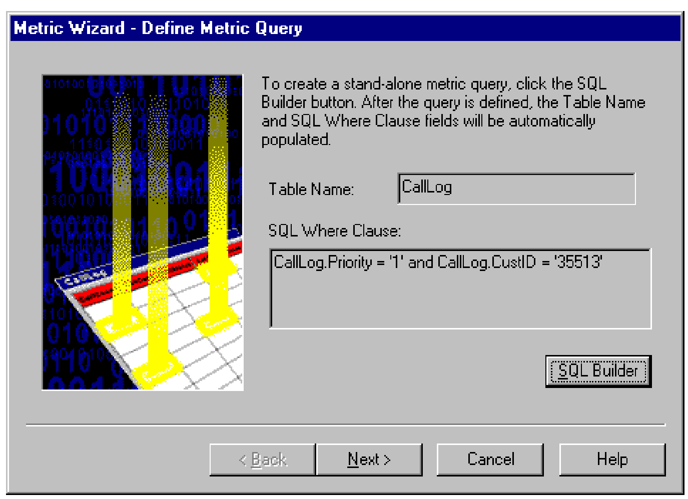
12. To verify that the syntax of the statement is correct, click the **Verify** button in the **Build SQL Statement** dialog box. If the statement executes correctly, you will see an advisory dialog box. If the statement is incorrect, a dialog box will provide information about the error.

Note: Don't forget to include the **and callstatus<>'closed'** statement where needed.

Note: If you are querying all calls in the system, consider using date ranges to limit your search criteria.

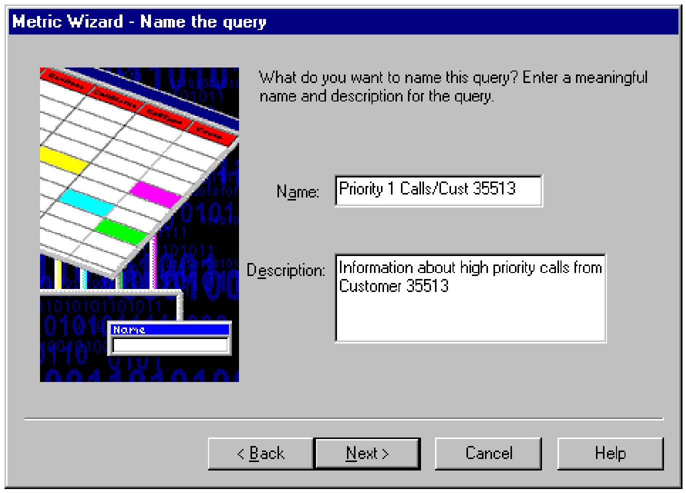


13. When you have completed the SQL statement, select the **Apply** button at the bottom of the SQL Builder dialog box and click **OK**. This takes you back to the **Metric Wizard** dialog box.



14. Notice that the **Table Name** and **SQL Where Clause** fields have been populated by SQL Builder.
15. Select **Next**.

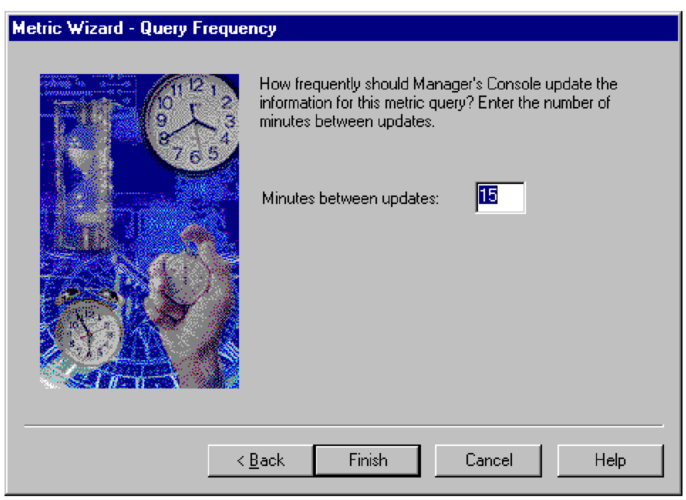
    The **Name the Query** dialog box has two fields to let you name and describe the new metric.



Name – What you want the new metric to be called.

Description – Enter a description of the metric.

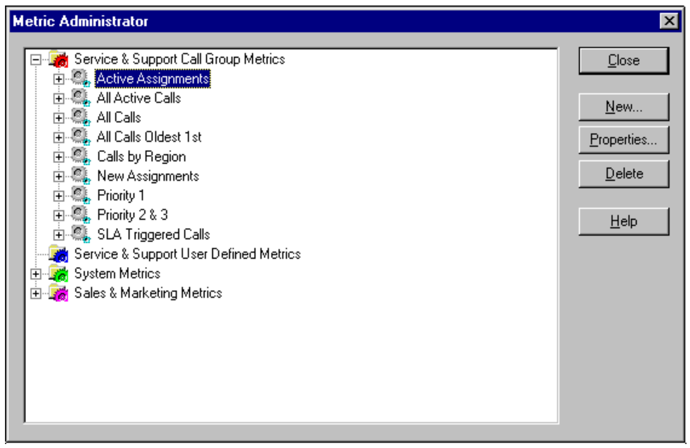
16. Select **Next**. The **Query Frequency** dialog box appears.



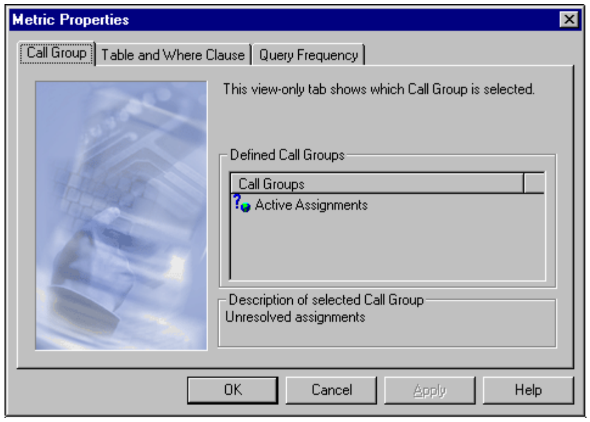
17. Enter a number to indicate how often you want Manager's Console to query the metric.
18. Select **Finish**.

Viewing or Changing a Group Metric's Properties

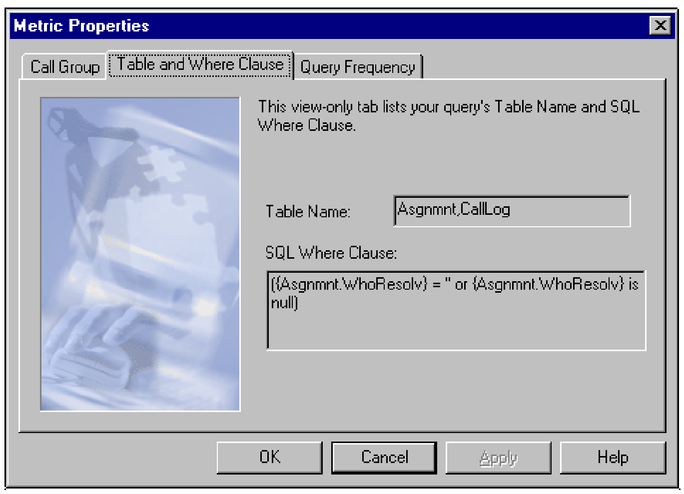
A metric's properties include its name, a brief description, the table and fields it monitors, and how frequently the table/fields are queried. If the **Properties** button is grayed out, you cannot view the selected metric's properties.



1. Select the metric you want to view or change.
2. Click on the **Properties** button. The **Metric Properties** dialog box with three tabs appears.



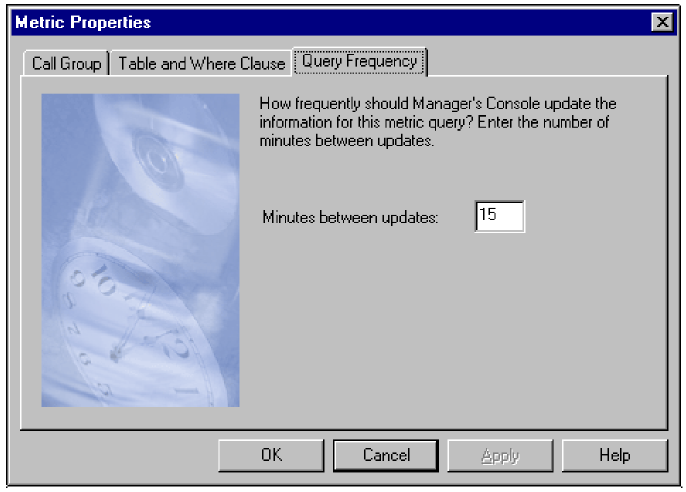
3. The **Call Group** tab displays the name of the selected Call Group. This screen is view-only.



4. Click on the **Table and Where Clause** tab.

   The **Table and Where Clause** tab identifies the table name and SQL Where Clause for the metric query. This screen is view-only.

   For more information on using the SQL Builder tool, refer to ***Defining New Metrics With the Metric Administrator***.

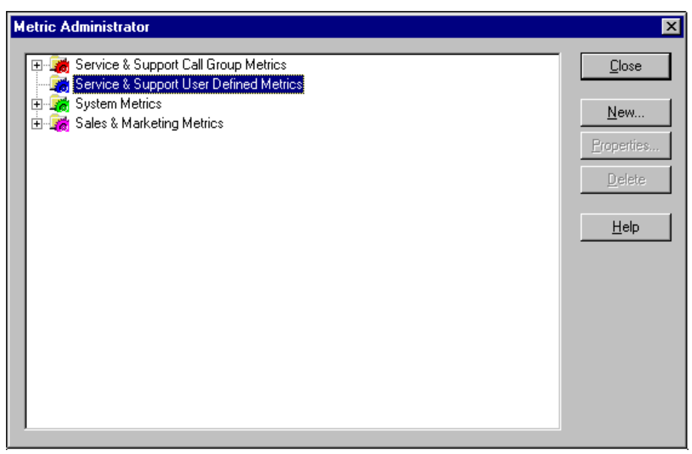


5. Click on the **Query Frequency** tab.

   The **Query Frequency** tab lets you change the time interval between queries.

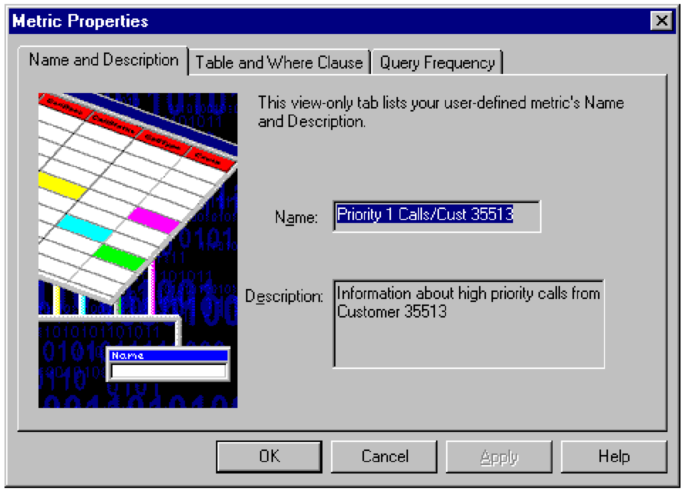
Viewing or Changing a User-Defined Metric's Properties

A metric's properties include its name, a brief description, the table and fields it monitors, and how frequently the table and fields are queried.

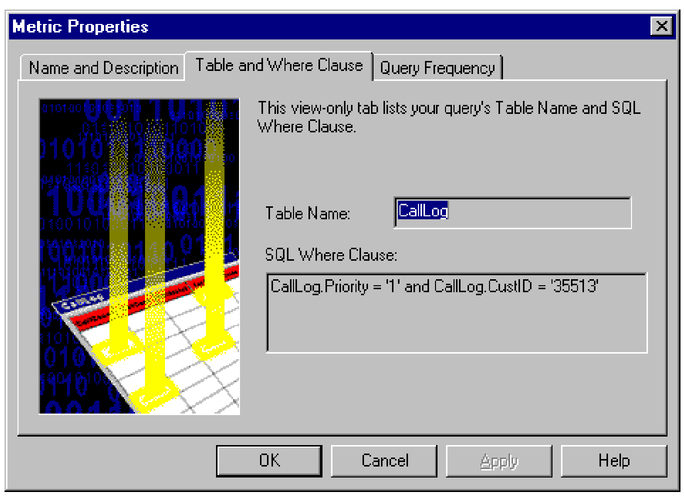


1. Select the metric you want to change.

2. Click on the **Properties** button. The **Metric Properties** dialog box with three tabs appears.



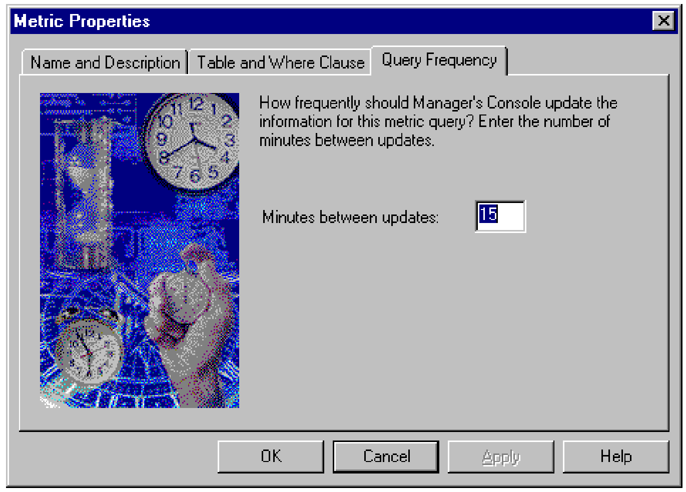
3. The **Name and Description** tab identifies the query. This screen is view-only.



4. Click on the **Table and Where Clause** tab.

   The **Table and Where Clause** tab lets you identify the table name and SQL Where Clause for the metric query. This screen is view-only.

For more information on using the SQL Builder tool, refer to ***Defining New Metrics With the Metric Administrator***.



5. Click on the **Query Frequency** tab.

   The **Query Frequency** tab lets you change the time interval between queries.

   Note: If you select a **System Metric**, only the **Query Frequency** tab is displayed.

Deleting a Metric

To delete a metric, highlight it in the **Metric Administrator** window and click on the **Delete** button.

Note: All indicators using this metric will also be deleted.

GoldMine Answer Wizard

Answer Wizard

Chapter 1

Overview

Answer Wizard for the Sales and Support Manager

GoldMine Answer Wizard is a management reporting tool for both sales and the support center supervisor or manager. It guides you through the process of choosing reports that can provide answers to key business questions. Using GoldMine Answer Wizard's query tools, you can choose from over 200 predefined reports built for your GoldMine database that focus on current and past performance. GoldMine Answer Wizard provides reports that can be viewed, printed, exported, or saved.

When you select a report, the GoldMine Answer Wizard makes running the reports easy. Selecting parameters for the report, such as date ranges, call types, or customer ID is performed with point-and-click simplicity. The parameters you choose are then passed to the report to get the information requested. Tactical questions such as "what is the current status of our support center calls" and "how many sales have we closed this week" can now be quickly answered. Strategic reports include answers to questions like "what are the top five causes for calls to the support center" and "what customers call need to be contacted in the near future."

Service and Support categories of reports include:

- **Current Status** reports give you a pulse on how your staff is doing right now. Reports and graphs about currently active calls can be broken out by tracker, assignee, urgency, duration, priority, and many other groupings.
- **Call Analysis** reports provide a statistical perspective on the types of calls your support center handles over a given period.
- **Customer Information** reports show you active and historic calls by customer, as well as your most and least active customers.
- **Technician Statistics** reports are great for handing out work assignments or preparing for performance reviews.
- **Service Level Agreements** reports let you stay on top of your commitments, as well as provide an analysis to help you fine tune your goals.
- **Miscellaneous** reports provide information about your GoldMine system, such as all GMSS users in the Tracker table, security groups, table field definitions, and customer, configuration, and call types.

Sales and Marketing categories of reports include:

- **Account / Contact Information** - Managing contact information is core to any sales or marketing role. Whether you're tracking prospects, customers or vendors, accessing this information when you need it, and how you need it, is critical to effective relationship management.
- **Personal and Team Calendars** - Day/Time planning is fundamental to any role. Whether you're scheduling work for yourself, delegating tasks to others or coordinating with an entire team, tracking and organizing your schedule is a basic requirement to ensure effective relationship management.
- **Past Activities -** Reviewing past activities allows you to get a summary of your or your team's progress, gather intelligence on specific events and better plan future activities. Accessing historical information is fundamental to building life-long customer relationships.
- **Sales Analysis -** Sales people spend alot of their time calling, following up and trying to get various tasks done. Sales managers spend much of their time trying to understand and measure what their sales people do. Oftentimes, that means sales people have to stop selling to produce reports or information for management. Accessing timely and accurate sales information without generating increased adminstrative workloads, for both the sales

person and sales manager, is critical to a sales team's success. With the appropriate information in hand, sales organizations can focus on selling and serving their customers to build profitable and lasting relationships.

- **Projects -** Account/contact management oftentimes requires more than just tracking names and conversations, it includes all of the tasks and responsibilities, as well as deadlines and inter-relationships between you, your team and the customer. Properly organizing and centralizing all the details related to a project is critical to effectively meeting the expectations of your customer relationships.

If you find a report to be especially useful, you can copy that report into a Favorite Reports folder for handy access. You can also add your own reports in Favorite Reports, letting you build your own Answer Wizard tree.

Answer Wizard

Chapter 2

Launching GoldMine Answer Wizard

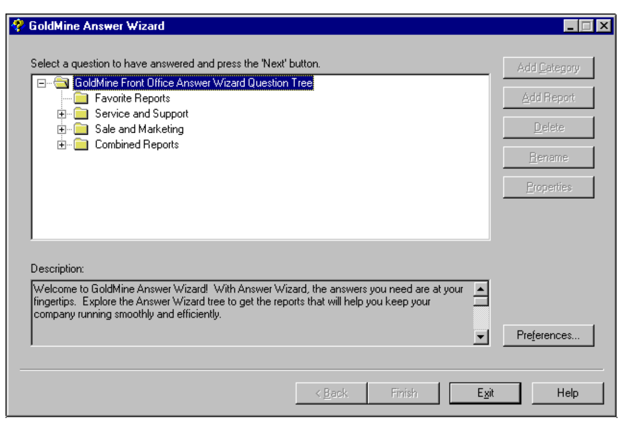
To start the program:

1. Select **GoldMine>>Management Intelligence>>Answer Wizard**

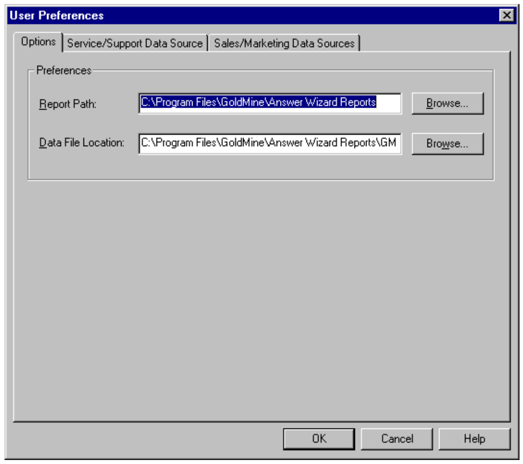
Setting up Answer Wizard Data Sources

Because Answer Wizard reports information from GoldMine Service and Support and and GoldMine Sales and marketing, you must specify a data source for each program. Answer Wizards must have a data source for GMSS, and a data source for GMSM.

When you first log into Answer Wizard for the first time, a User Preferences dialog box displays, where you specify the location of the data sources and other information used by Answer Wizard. You can also access User Preferences by clicking the Preferences button on the Answer Wizard main screen.



To Set Up the Report Path



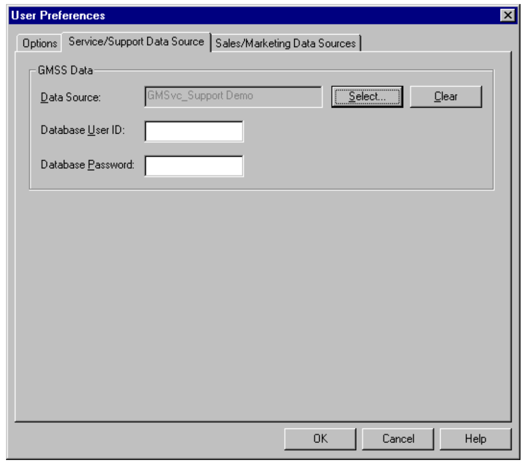
1. Type the report path name in the Report Path field or click Browse to navigate to that location. The Report Path is the location where Answer Wizard reports are stored when you save them.

To Set Up the Data File Location

2. Type the Data File location in the Data File Location field or click Browse to navigate to that location. The Data Field is the .dat file where the Answer Wizard templates are stored.

Setting up a Data Source for GoldMine Service and Support

1. From the User Preferences dialog box, click the Service/Support Data Source tab.

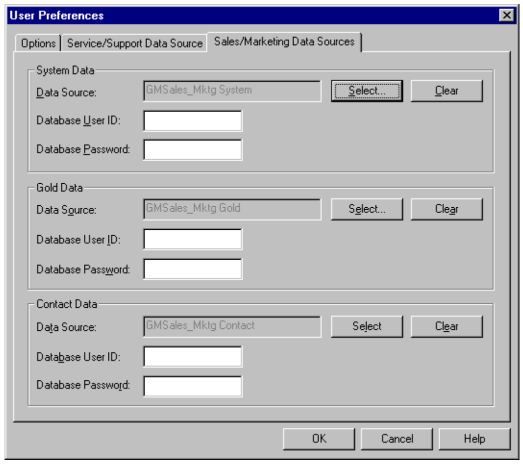


2. Click the Select button to choose a data source and then click OK.
3. Type the data source User ID in the Database User ID field.
4. Type the data source password in the Database Password field.
5. Click OK.

Setting up a Data Source for GoldMine Sales and Marketing

GoldMine Sales and Marketing uses three data sources (databases) from which it retrieves information. In this dialog box, you must specify the location of the GoldMine data sources.

If the data sources are not set up in the User Preferences dialog box, Answer Wizard prompts you for the location of the data source when you run a GMSM report.



Setting up the System Data

1. From the User Preferences dialog box, click the Sales/Marketing Data Source tab.
2. Click the Select button in the System Data area to choose the data source where The GMSM core system information is stored. Click OK.
3. Type the data source User ID in the Database User ID field.
4. Type the data source password in the Database Password field.
5. Click OK.

Setting up the Gold Data

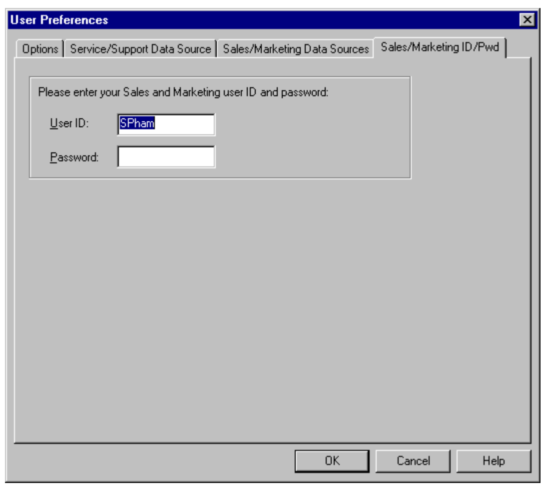
1. From the User Preferences dialog box, click the Sales/Marketing Data Source tab.
2. Click the Select button in the Gold Data area to choose the data source where the GMSM calendar information is stored. Click OK.
3. Type the data source User ID in the Database User ID field.
4. Type the data source password in the Database Password field.
5. Click OK.

Setting up the Contact Data

1. From the User Preferences dialog box, click the Sales/Marketing Data Source tab.
2. Click the Select button in the Contact Data area to choose the data source where your GMSM contact information is stored. Click OK.
3. Type the data source User ID in the Database User ID field.
4. Type the data source password in the Database Password field.
5. Click OK.

User ID and Password for Sales and Marketing Tab

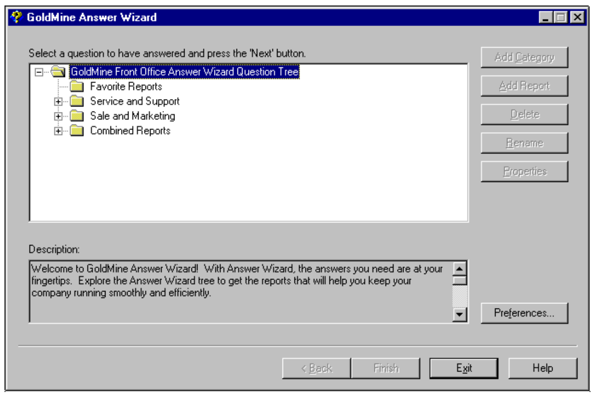
1. Enter your User ID/Password (same User ID/ Password used to login in to GoldMine Sales and Marketing.)



Selecting a Report

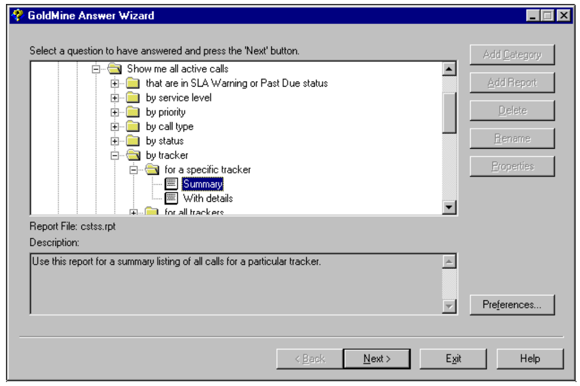
After you've selected a data source, you're ready to begin defining your report parameters. The Answer Wizard main window is where you will select the report you want to view. Reports are grouped by category and branch down into other related categories or reports. Categories are represented by a folder  icon; reports are represented by a paper  icon.

In order to define your report parameters, you must decide what type of information you are seeking. For example, suppose you were a support center manager and wanted to see a listing of all the active calls for technician, D. Clark. Use the **Answer Wizard Question Tree** to locate the report you want to view.

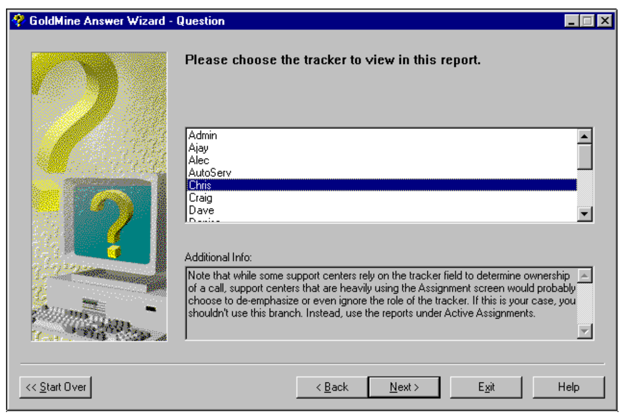


Navigate through the Question Tree:

1. Double-click the **Current Status** folder.
2. Double-click the **Show me all active calls** folder.
3. Double-click the **by tracker** folder.
4. Double-click the **for a specific tracker** folder.
5. Click the **Summary** report item to highlight it.



6. Click **Next**. A **Question** dialog box appears that lists the names of all trackers in the database.
7. Select **Chris** from the list displayed.



8. Click **Next**. You are now ready to print your report.

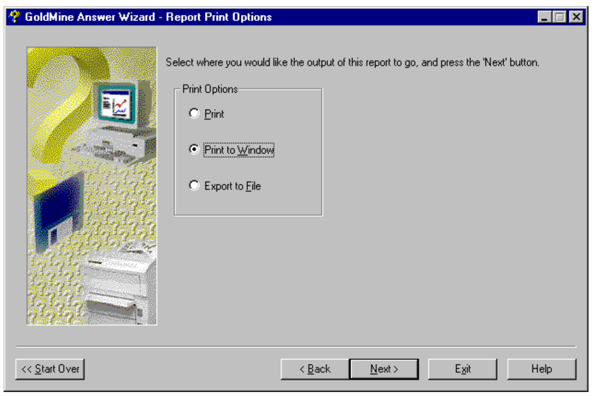
Printing Your Report

The **Report Print Options** window has several different options. From this window, you can:

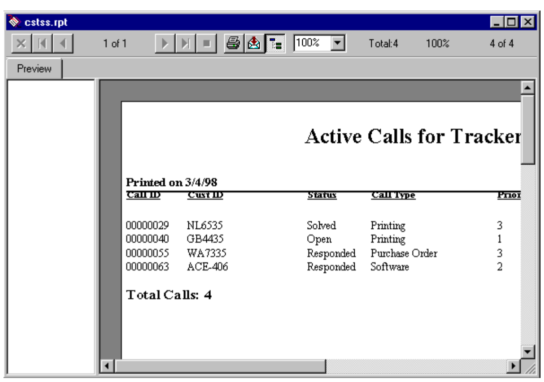
- Output your report to the printer
- View the report on your screen
- Export your report to a file

We will demonstrate how to view the report on your screen.

1. Click **Print to Window** from the **Report Print Options** screen.
2. Click **Next**. The report appears on your window.



3. After viewing your report, click the **Close** option to close the window.



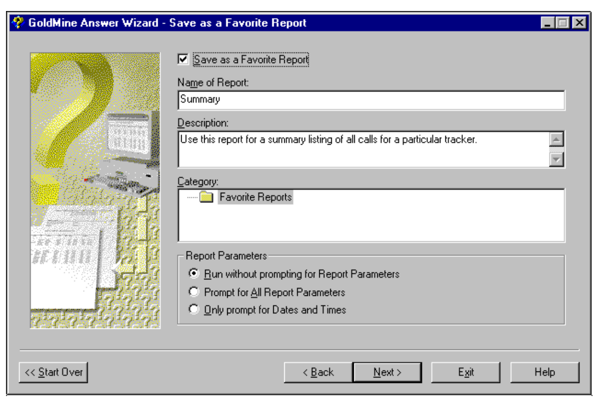
Saving a Favorite Report

At this point, we have viewed the report and want to save it in a place where it's easily accessible. This is where the **Favorite Reports** folder comes into play. The **Favorite Reports** folder is where you want to save the reports you'll use on a regular basis and where you'll add your custom reports.

After closing the report window, you have the option of saving your report to the **Favorite Reports** folder.

To save a favorite report:

1. Click the **Save as a Favorite Report** option.
2. Type in the name you want to give to your report in the **Name of Report** text field.
3. Type in a new description for the report in the **Description** text field or keep the predefined description provided.
4. Select the main **Favorite Reports** category as the category where you want the report saved.
5. Choose **Run without prompting for Report Parameters**.
6. Click **Next**. Your report is now saved in the **Favorite Reports** folder. You can either create another report or exit the program.



Answer Wizard

Chapter 3

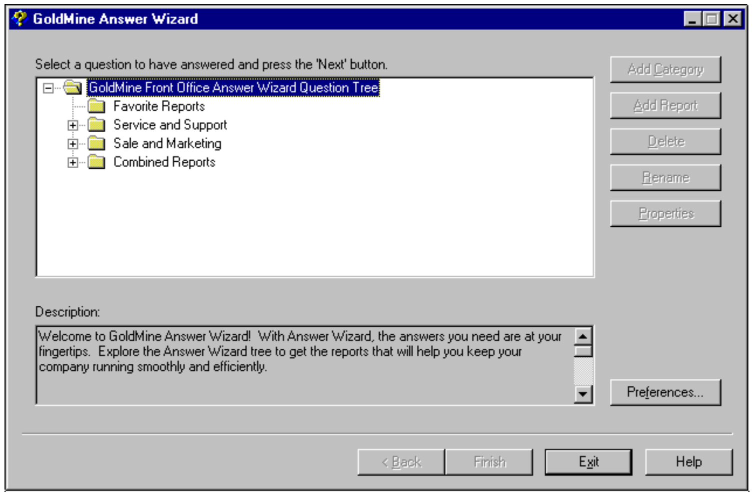
Answer Wizard Features

The GoldMine Answer Wizard Main Screen

Several different options are available in the Answer Wizard main window. From this screen, you can:

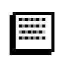
- Access any reports available in the data source
- Add a category to Favorite Reports
- Add a report to Favorite Reports
- Delete a Favorite Report
- Rename a Favorite Report
- View the properties of a Favorite Report

All reports are accessible from this window. To access a report, you must navigate through the **GoldMine Answer Wizard Question Tree**.



Navigating Through the Tree

The highest level available in the tree is the **GoldMine Answer Wizard Question Tree**. Other folders, also called "categories," branch down from the GoldMine Answer Wizard Question Tree. If a category contains related categories and reports, a **plus (+) sign** appears on its left. A **minus (-) sign** indicates that there are no other levels to access.

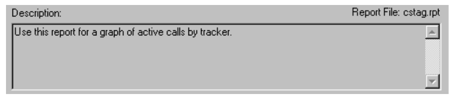
- A category is represented by a folder  icon.
- A report is represented by a paper  icon. This is the lowest level of information available.

To close a file folder:

1. Double-click the file folder, or
2. Click on the **minus (-) sign** located next to the folder.

Description Window

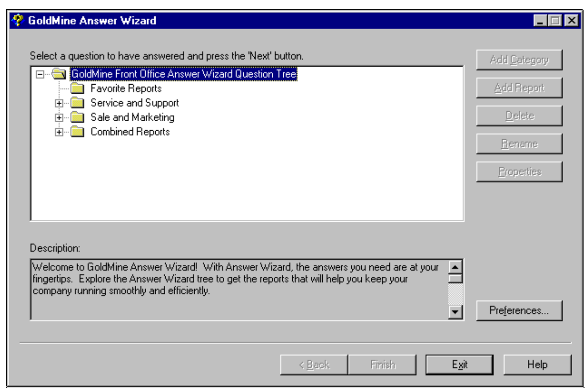
When any category or report is highlighted, a brief explanation of the item is displayed in the description window. If a report is selected in the tree, the name of the report appears above the window also, as shown below.



Preferences Button

The **Preferences** button resides on the Answer Wizard main window. Clicking this button displays the **Set Up Answer Wizard Data Sources**

- Select a **Data Source** for GoldMine Sales and Marketing and GoldMine Service and Support.
- Set up the **Report Path**



To access these options, click the **Preferences** button on the Answer Wizard main window.

Favorite Reports

The **Favorite Reports** folder is available to store commonly used reports. Items in the **Favorite Reports** folder are the only items that can be edited, deleted or renamed. From the **Favorite Reports** folder, you can do any of the following:

- Add a category to Favorite Reports
- Add a report to Favorite Reports
- Delete a Favorite Report
- Rename a Favorite Report
- View or change the properties of a report
- View or change the properties of a category

Adding a Category to Favorite Reports

Other folders, also called "categories," can be added to the **Favorite Reports** menu. Categories are used to organize information with the **Favorite Reports** folder. They can contain more categories and reports.

To add a category to Favorite Reports:

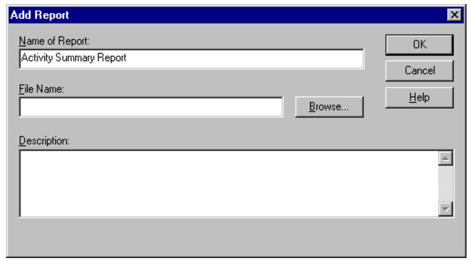
1. Click on the **Favorite Reports** folder to highlight it.
2. Select the **Add Category** button.
3. Enter the name of the new category in the highlighted text field.

Adding a Report to Favorite Reports

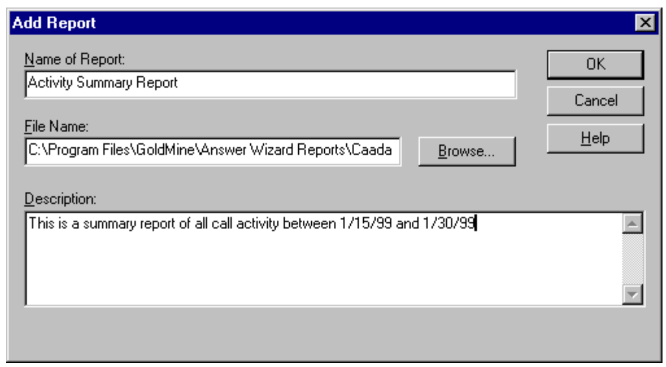
Any Answer Wizard report or custom report can be saved in the **Favorite Report** folder or any folder under the main **Favorite Reports** folder. The **Add Report** button is available only when the **Favorite Reports** folder (or folder within the **Favorite Reports** folder) has been selected and highlighted.

To add a report to Favorite Reports:

1. Click on the **Favorite Reports** folder to highlight it.
2. Select the **Add Report** button. The **Add Report** dialog box appears.
3. Enter the name of the new report in the **Name of Report** text field.



4. Type in the name of your report in the **File Name** field. Use the **Browse** button, if necessary.
5. Type a description of the report in the **Description** field.



6. Click **OK**. Your report has now been added to the **Favorite Reports** folder.

Creating and Modifying Reports

If you want to create custom reports to use with Answer Wizard, you can create your custom report in Crystal Reports.

If you want to customize an Answer Wizard report, first copy that report to a new location with a new name and modify the copy instead of the original. The Answer Wizard reports are read-only and should not be directly modified. If you modify the original report file, your changes will be overwritten if the report is updated in a future release of Answer Wizard.

Launching Crystal Reports

From GMSS, you can launch Crystal Reports to create or modify any report.

NOTE: To launch Crystal Reports, it must be installed on your system, and you must have special security rights. See your system administrator.

To launch Crystal Reports:

From the Call Logging module, select **Accessory>>Report Writer**.

If you haven't set the location of the program, GMSS will prompt you for it.

Setting Locations of Report Writer and Search Tools

If you record the locations of Crystal Reports, GMSS will not prompt you to find them each time you launch them.

To set locations of the report writer and search tools:

1. From the Call Logging module, select **Edit>>User Preferences**. The **User Preferences** dialog box appears.
2. Click the **Paths** tab.
3. In each of the following fields, enter a path OR click the **Browse** button to locate and select each application.

   Crystal: enter the path to Crystal Reports (CRW.EXE)

   Reports: enter the path to your reports directory.

   If you use the **Browse** button, select any report file in the reports directory, then click the **OK** button.
4. Click the **OK** button.

Deleting a Report or Category

The **Delete** option is available from the Answer Wizard main window.

To delete a report or category:

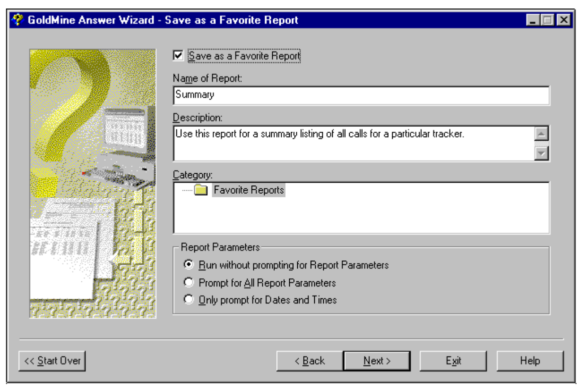
1. Click the report or category to highlight it.
2. Click the **Delete** button.
3. Click **Yes** in the confirmation box. The item is now deleted.

Renaming a Report or Category

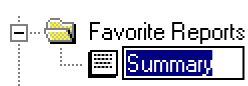
At times, you may want to rename a report or category. Any report or category within the **Favorite Reports** folder is available for renaming. (Predefined Answer Wizard reports categories and reports cannot be edited.) This option is available from the Answer Wizard main window.

To rename a report or category:

1. Click on a report in the **Favorite Reports** folder to highlight it.



2. Click the **Rename** button. A box appears around the name of your report.



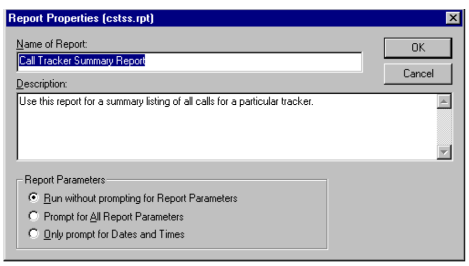
3. Type in the new name of your report.
4. Click anywhere to refresh the window. The new report name appears.

Viewing and Changing the Properties of a Favorite Report

Favorite Reports have properties that can be viewed and changed. The property information of a favorite report includes the report name, description and report parameters.

To view or change the properties of a favorite report:

1. Click on a report in the **Favorite Reports** folder to highlight it.
2. Click the **Properties** button. The name and description of the report appear in the **Report Properties** window. Any field within this window can be edited.



Report Parameters lets you assign different rules to a report when it is accessed. These parameters apply only to the predefined Answer Wizard reports that you have added to Favorite Reports. Any custom reports you may have created will only prompt for the Crystal Reports parameter function, not the Answer Wizard parameter features.

- Click **Run without prompting for Report Parameters** if you do not want to be prompted for new parameters.
- Click **Prompt for All Report Parameters** if you want the option of changing the report parameters each time it is run.
- Click **Only prompt for Dates and Times** if you want the opportunity to change the date or time range whenever the report is run.

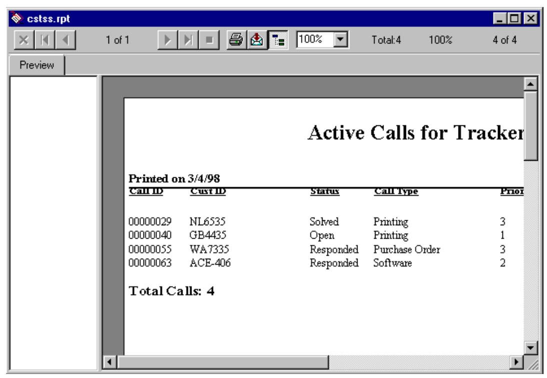
Printing Reports

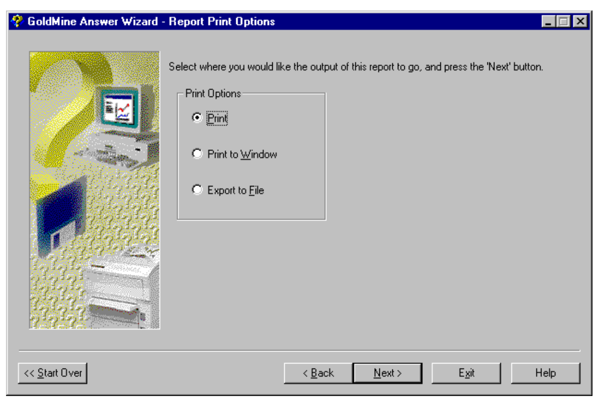
After selecting a report, you can use any of the print options available on the **Report Print Options** window. From this window, you can:

- Output your report to the printer
- View the report on your screen
- Export your report to a file

To print your report:

1. Click the **Print** radio button.
2. Click **Next**.





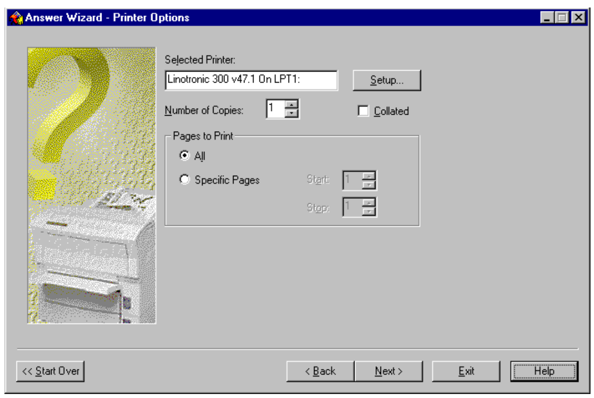
3. Click **Setup** to locate your network printer or use the default printer displayed in the **Selected Printer** field. From the **Printer Setup** dialog box, you can also select Paper Size, Source, and Orientation. Click **OK**.

4. From the **Printer Options** dialog box, enter the number of copies you want to print in the **Number of Copies** field.

5. Select **Collated** if you are printing several copies that you want to be collated during the print job.

6. Choose **All** from the **Pages to Print** window to print the entire report or choose a print range.

7. Click **Next** to send the report to your printer.



To view your report on your screen:

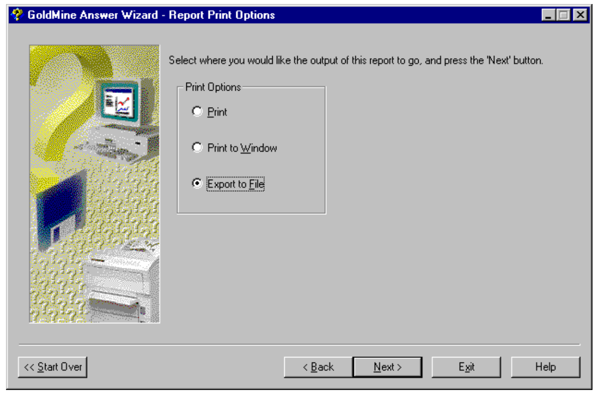
1. Choose **Print to Window** from the **Report Print Options** window.

2. Click **Next**. Your report appears on your screen.

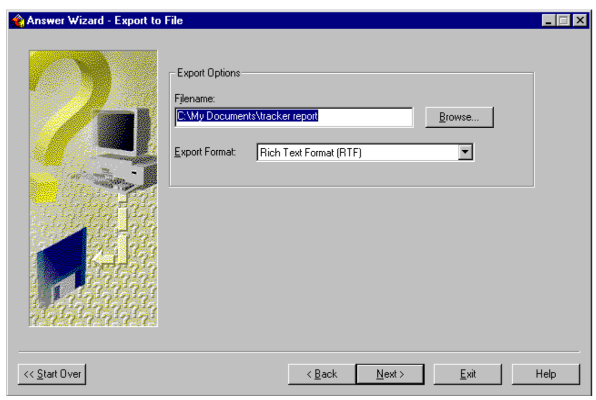
To export your report to a file:

1. Select **Export to File** from the **Report Print Options** window.

2. Click **Next**.



3. Enter the file name and directory information in the **File name** field. This is the location where you want the report saved. Use the **Browse** button if you prefer to navigate to that location.
4. Select a file format from the **Export Format** drop-down menu. Click **Next**. Your report has now been exported.

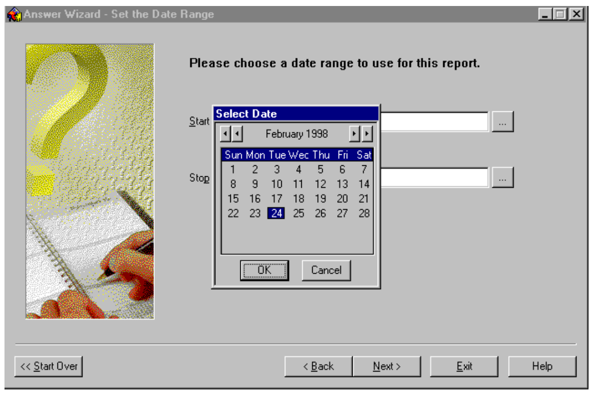


Choosing a Date Range

For certain reports, you may need to choose a date range. After selecting your report, a window appears in which you can define the date range you want to include in your report.

To set a date range:

1. Click the **Field Edit** ... button next to the **Start Date** field to open the pop-up calendar.
2. Click on a date in the calendar that will mark the beginning of your targeted date range. Months and years can be changed by clicking the left or right arrows at the top of the calendar.



3. Click the **Field Edit** ... button next to the **Stop Date** field to open the pop-up calendar.
4. Choose the date in the calendar that will mark the ending date for your targeted date range.
5. Click **Next**.

Choosing a Single Date

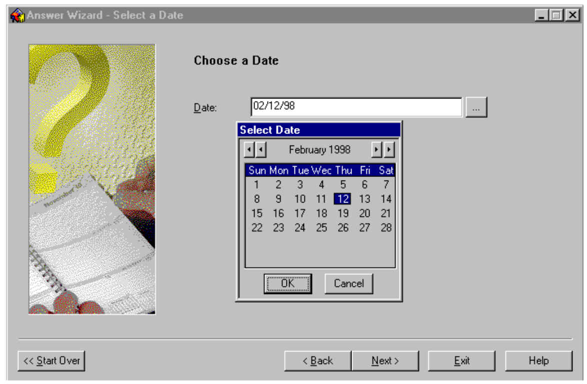
For certain reports, you must select a specific date before the Answer Wizard can collect the requested information. After selecting your report, a window appears in which you can choose a specific date for your report.

To select a date:

1. Click the **Field Edit** ... button next to the **Date** field to open the pop-up calendar.
2. Choose a date from the calendar. Months and years can be changed

by clicking the left or right arrows at the top of the calendar.

3. Click **Next**.

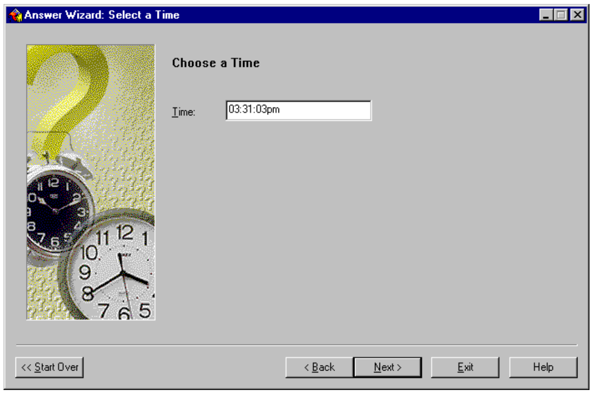


Choosing Time or a Time Range

For certain reports, you may need to choose a specific time or a time range. After selecting your report, a window appears in which you can choose the time or time range.

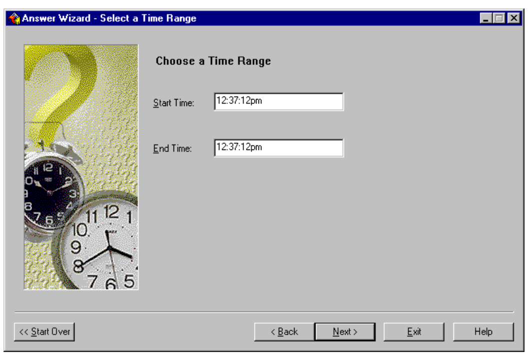
To choose a specific time:

- In the **Time** text box, type in the time. Make sure you specify whether it is a.m. or p.m. For example: 3:31:03pm



To define a time range:

1. In the **Start Time** text box, type in the beginning time of your range. Specify a.m. or p.m.
2. In the **End Time**, type in the end time of your range. Specify a.m. or p.m.
3. Click **Next**.

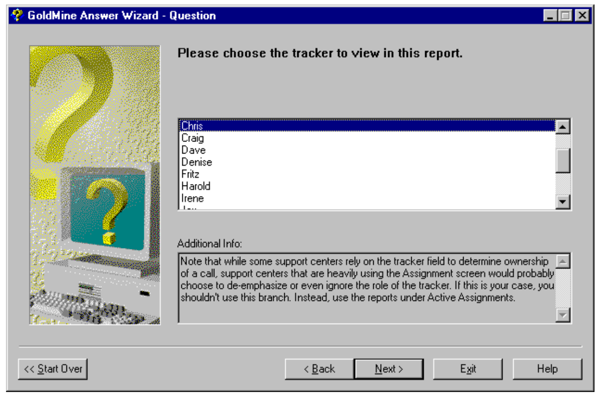


Choosing From a List

Some reports require further detail to produce the desired results. Lists are provided from which you can choose a particular technician, status, etc.

To select an item from a list:

1. Click on an item in the list to highlight it.
2. Click **Next**.



Responding to a GoldMine Answer Wizard Question

A few reports in Answer Wizard require another level of detail before the requested information can be produced. In these cases, Answer Wizard presents specific questions that must be answered. For example, some reports request that you type in the number of minimum hours or days to target a specific time-frame for your report; other reports request a customer identification number.

To respond to an Answer Wizard question:

1. Type in the specific information requested by Answer Wizard. In some screens, you may need to select the question from the drop-down menu provided in the window.
2. Click **Next**.

Drilling Down on a Chart

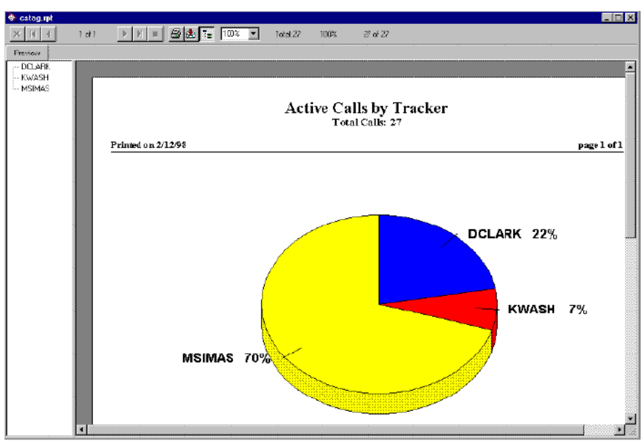
When accessing reports that appear in chart form, you can choose to drill down to a more granular level of information or use the report tree.

Drill Downs

Answer Wizard charts are summaries of information in the selected report. For example: A pie chart might represent the total number of calls for a specific day, but each slice is relative to a specific tracker. Charts in Answer Wizard are set up to provide a high level of information, as well as a more granular level of information. For example, you might want to see the calls for a specific tracker. By double-clicking on any portion of the chart, you can "drill down" to more specific information about that particular portion. The cursor will change to a magnifying glass whenever you are on an item that can be drilled down.

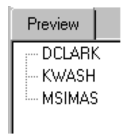
To drill down:

- Double-click on any portion of the graph. The specifics for that information will appear on a tab behind the main chart window. Each tab corresponds to a specific bar or slice on the graph and can be toggled by clicking on the tab.

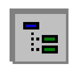


Using the Report Tree

The **Report Tree** is a navigational tool that allows you to move to a specific section of the report. The tree appears in the left hand side of the chart and represents specific sections of the chart. In the example below, there are three trackers represented on the chart. Therefore, the individual names from the chart appear on the tree.



To show or hide the tree:

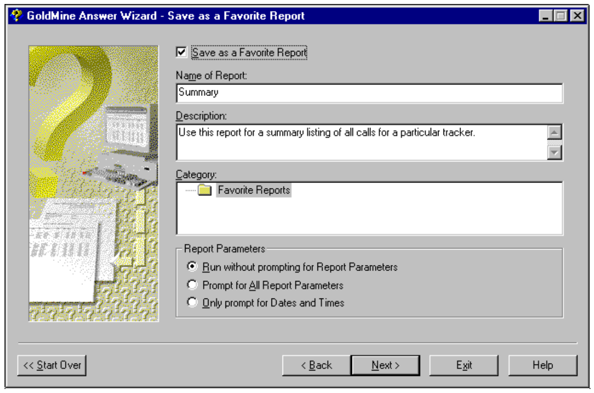
- Click on the **Tree**  button on the **Report** window toolbar to display the **Report Tree**.
- Select any information in the tree to view summary information related to that item. Your view will move to the section showing the selected information.

Saving a Report as a Favorite Report

After you've run a report, you may want to store it in the **Favorite Reports** folder where it's easily accessible. The **Save as a Favorite Report** screen is where you will accomplish this. This screen appears after you've run your report and print options. From the **Save as a Favorite Report** screen, take the following steps.

To save a favorite report:

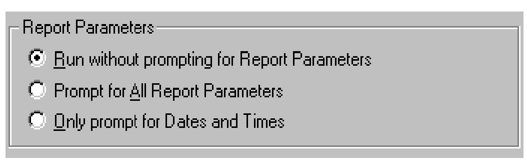
1. Click the **Save as a Favorite Report** option.
2. Type in the name you want to give to your report in the **Name of Report** text field.
3. Type in a new description for the report in the **Description** text field or keep the predefined description provided.
4. Select the category where you want the report to be saved.
5. Choose an option from the **Report Parameters** section.
6. Click **Next**. Your report is now saved in the **Favorite Reports** folder.



Setting Report Parameters

There are different rules you can give to a report when it is accessed. These report parameters are assigned to the report when it is saved. From the **Save as a Favorite Report** window, you can set up the following report parameters:

- Run without prompting for report parameters
- Prompt for all report parameters
- Prompt only for dates and times



Run Without Prompting for Report Parameters

If you want to run a report without being prompted for new parameters, use the **Run without prompting for Report parameters** option. This option is located in the **Save as a Favorite Report** window under the **Report Parameters** option.

To use the **Run without prompting for report parameters** option:

1. Select the **Run without prompting for Report Parameters** option in the **Report Parameters** box.
2. Define the report name, description, etc.

3. Click **Next**. The Answer Wizard completion window appears.
4. Choose **Finish**.

Prompt for All Report Parameters

Use the **Prompt for All Report Parameters** option if you want the option of changing the report parameters each time it is run.

To use the **Prompt for All Report Parameters** option:

1. Select the **Prompt for All Report Parameters** option in the Report Parameters box.
2. Define the report name, description, etc.
3. Click **Next**. The Answer Wizard completion window appears.
4. Choose **Finish**.

Only Prompt for Dates and Times

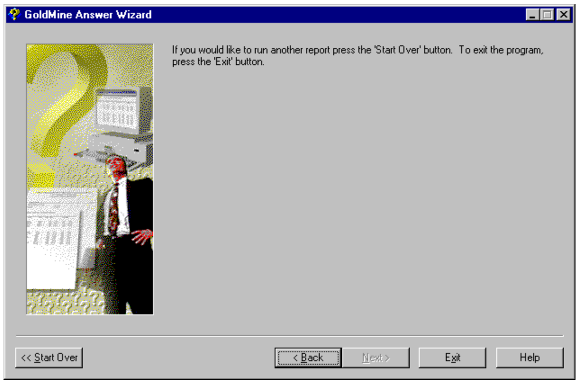
When saving a favorite report, the **Prompt for Dates and Times** option gives you the opportunity of changing a date or time range whenever the report is run. The option is located in the **Report Parameters** box on the **Save as a Favorite Report** window.

To use the **Only prompt for dates and times** option:

1. Select the **Only prompt for dates and times** option in the **Report Parameters** box.
2. Define the report name, description, etc.
3. Click **Next**. The Answer Wizard completion window appears.
4. Choose **Finish**.

Viewing Another Report

After viewing your report, you have the opportunity to create another report without having to restart the program. The **Run Another Report** window is used for this purpose. If you don't want to create a new report, click **Exit** to leave Answer Wizard.



To run another report:

- Select the **Start Over**  button. The Answer Wizard main window appears.

Answer Wizard

Glossary

Actions – What Manager's Console does when one of the metric indicators crosses a pre-defined threshold. For example, you might define an action as sending e-mail to one of your employees or co-workers when a metric indicator crosses from yellow to red.

Cause – A field in the Metric Log that lets you enter a cause for the metric crossing a threshold.

Console Properties – Properties (attributes) that control how Manager's Console operates. These properties include the data source it queries, the mail settings it uses to send e-mail, and the name of the PC from which you are running.

Corrective Action/Plan – A field in the Metric Log that lets you enter the action taken to move the indicator back into an 'acceptable' range.

Detailed Query – Query based on fields in a table, as opposed to a simple count of table entries.

Falling Event – A threshold crossing that occurs as the metric is falling in value.

Field – Fields are specific database entries (e.g., Call Type, Cause, Priority).

File Data Source – A file data source can be shared by other users unless marked otherwise (e.g., non-sharable).

Gauge – A metric indicator in the form of a gauge. The gauge may display thresholds (green, yellow, and red) indicating when a metric is 'acceptable', 'cause for concern', or 'unacceptable'.

Graph – A metric indicator in the form of a bar chart. The x-axis of this chart can be time, people, etc. The chart, like the gauge, can display thresholds (green, yellow, and red) indicating when a metric is 'acceptable,' 'cause for concern,' or 'unacceptable.'

Group Properties – Properties or characteristics that relate to Manager's Console Group tabs. These include the name of the tab and the number of indicator rows displayed for the tab.

Group Tab – A means of grouping similar metrics together into a folder. For example, you may want to group together all calls from a particular customer.

Group Indicator – A colored icon on each tab that lets you monitor the worst case of each indicator in the tab. For example, if two indicators in a tab are in the green region, and one is in the red region, the icon on the tab will display red. This lets you see at a glance the worst-case status of all indicators without having to display each tab individually.

Call Group – A set of Call Records that meet certain criteria. When you search a database, a Call Group is created of all Call records found in the search. An example of a Call Group is **All Open Calls**.

Call Log – A call record used to record all pertinent information about customer calls.

Call Record – A complete record of a customer call or service request. Each Call Record is linked to a Customer Record, where information about each customer is stored.

Indicator (also Metric Indicator) – A graphical means of displaying the status of a Metric Query (a gauge or chart).

Indicator Properties – Properties or characteristics that relate to graph or gauge indicators in Manager's Console. These include setting indicator thresholds, threshold values, the general appearance of the indicator, how the indicator behaves when you Zoom, and the actions taken when the indicator crosses a threshold.

Log Entries – A window in the Metric Log that contains a log of all transitions (i.e., every time the selected metric indicator crosses a set threshold) for the selected metric. Also logged are the date the transition crossed the threshold and the day it crossed the threshold in the opposite direction. Note that entries are made in this log by Manager's Console only if you have enabled logging.

Machine Data Source – A data source for this machine only. A machine data source cannot be shared.

Machine Name – A name given to your PC by your System Administrator. Names are used because they make each machine easier to remember and identify than using numbers.

MAPI – MAPI (Messaging Application Program Interface) is a standard developed by Microsoft that allows applications to communicate with one another through a common interface. Most mail applications use VIM or MAPI.

Master Group Indicator – A colored icon displayed at the upper left corner of the Manager's Console window, or beside the application name in the task bar (if Manager's Console is running in a minimized window (background mode)). This icon indicates the worst case status of all group tabs in the application. For example, if one or more of the indicators has crosses into the red area since the last query, the Master Group Indicator will be red.

Metric – Any issue or Call Group from that can be measured.

Metric Administrator – A single screen in Manager's Console that lets you display the settings for all indicators. The Metric Administrator is run by selecting **Console>>Metric Administration** in the menu bar.

Metric Indicator Wizard – Wizard that aids you in building a new metric indicator.

Metric Log – A log that tracks any threshold crossings for a selected metric. This log records the time and date that a metric crosses a threshold, either rising or falling.

Metric Query – A query of a database table that is displayed as a metric in Manager's Console.

Pre-defined metrics – A list of all the groups already defined for Manger's Console.

Property – An attribute, such as threshold values.

Query – A sample of values for a selected database table.

Query Frequency – How often the database you are using should be queried by Manager's Console for a particular metric indicator.

Query Value – The value of the selected metric when the database is queried.

Rising Event – A threshold crossing that occurs as the metric is rising in value.

Server Name – A name used to identify the server from which Manager's Console is running.

SQL Builder – A tool (accessible from the Metric Indicator Wizard) that lets you define a call group from tables and fields using SQL operators.

SQL Expression – An logical expression made up of table fields and SQL operators.

SQL Operator – A logical operator that lets you combine two or more table fields into a query. For example, The AND operator can be used to query the table about Date AND Time of entries.

Status Change – A threshold crossing by one of the metric indicators. In other words, when one of the metric indicators crosses from green to yellow, or from yellow to red.

Summary Query – A simple count of the Call Group entries.

System Metrics – Metrics supplied with Manager's Console that cannot be deleted or added to. An example of a system metric is 'People Logged into GMSS.'

Tab – A means of grouping similar metrics together into a folder. For example, you may want to group together all calls from a particular customer. Also called Group Tab.

Table – Tables are essentially a way of relating database information of similar type. For example, one of the tables is Call Types, which contains information about the type of each call logged in GMSS.

Threshold – A user-defined crossover point in a metric indicator that delineates green/yellow or yellow/red regions.

Threshold Types – One of three types of metric indicators. They are:

High – used for a metric that causes concern as it goes higher. An example would be **All Calls**, since you want to monitor the number of calls as they go up.

Low – used for a metric that causes concern as it goes down. An example would be number of trackers, since you would be concerned if it fell below a certain number.

High and Low – used for a metric that causes concern as it goes up or down from a set range. In other words a metric that should stay in some middle range.

Threshold Values – Defines thresholds for your gauge/chart, as well as the minimum and maximum values. Thresholds are those points that define the transition from green to yellow and yellow to red.

User-Defined Metrics – Metrics defined by the user with the SQL Builder. The SQL Builder lets a user define a Call Group using tables, fields, and SQL operators. The SQL Builder is part of the Metric Indicator Wizard, and is available to all users.

User Name – Your user name for and any of its modules. This is the name you use when you log onto Managers Console or Answer Wizard.

VIM – VIM (Vendor Independent Messaging) is a standard developed by Lotus Corporation that allows applications to communicate with one another through a common interface. Most mail applications use VIM or MAPI.

Zoom – This GMSS function lets you 'drill down' to more specific data on a metric indicator. For example, Zooming lets you see the actual call logs, or the historical values (displayed in bar chart form) of any indicator.

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