

# **GENESYS**

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## Genesys Customer Experience Insights User's Guide

Genesys Customer Experience Insights 9.0.0

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## Genesys CX Insights 9.0 User's Guide

Welcome to the *Genesys CX Insights User's Guide*. Genesys Customer Experience Insights (Genesys CX Insights) provides reports that summarize contact center activity. This document is valid only for the 9.0.x releases of Genesys CX Insights, and is intended for on-premise deployments of Genesys CX Insights. If you have Genesys CX Insights in the Genesys Engage cloud, see the *Reporting in the cloud* guide.

This guide picks up where the *Genesys CX Insights Deployment Guide* leaves off. Begin to use this document only after you have:

- configured Genesys Info Mart and its supporting applications to measure and record contact center activity (not required for iWD reporting).
- configured iWD Datamart and its supporting applications to measure and record contact center activity (not required for Genesys Info Mart reporting).
- installed and set up Reporting and Analytic Aggregates (RAA) (not required for iWD reporting).
- installed and set up your MicroStrategy environment.
- installed and imported the appropriate reports and CX Insights Project.

This document describes the reports, metrics, attributes, and prompts that you will encounter in Genesys CX Insights, and describes:

- how to manage the out-of-box reports that are deployed with Genesys CX Insights.
- how to create or modify reports and the supporting project elements using MicroStrategy Web.
- how project elements are organized to paint a picture of contact center activity within your enterprise.

This document describes the 9.0.x release(s) of Genesys CX Insights. For other releases of Genesys CX Insights, visit the Genesys Customer Care website, or request the Documentation Library DVD, which you can order by email from Genesys Order Management at Genesys Order Management.

Genesys CX Insights requires a compatible release of MicroStrategy software as described in the Genesys CX Insights Deployment Guide, and in the Product Alert.

## About Genesys CX Insights

Genesys CX Insights provides reports and dashboards that summarize contact center activity. Reports display contact center activity using easy-to-read grids, while dashboards summarize a wider range of information using a variety of visual devices. Beginning with release 9.0, Genesys CX Insights replaces Genesys Interactive Insights (GI2), the historical reporting tool used in previous Genesys releases.

#### MicroStrategy software

This document does not describe in detail how to operate MicroStrategy software, because that

information is provided in documentation provided by MicroStrategy. For more information about the operation of MicroStrategy Web, MicroStrategy Developer, or other tools provided by MicroStrategy, refer to the MicroStrategy Platform Documentation CD, or go directly to MicroStrategy product documentation online.

#### Tip

Because you can customize the appearance and functionality of MicroStrategy user interfaces, screens shown in this guide might differ from what you see in your environment.

## New In This Release

This section describes the changes that have been incorporated within this guide since the 9.0.0 release of Genesys CX Insights.

## Genesys CX Insights 9.0.019

- Beginning with release 9.0.019.01, some pod names are changed to reflect Genesys' commitment to
  diversity, equality, and inclusivity. This document refers to "gcxi-master" and "gcxi-slave", which were
  pod names used in release 9.0.019.00 and earlier, however, beginning with release 9.0.019.01, these
  pod names are changed to "gcxi-primary" and "gcxi-secondary".
- New dashboards provide enhanced analysis of Designer-application usage:
  - Milestone Path Analysis Dashboard Explore the first and last milestones customers traversed, and the number of sessions that ended in each final disposition. (GCXI-4285)
  - ANI Details Dashboard Explore outcomes of customer interactions based on Automatic Number Identification (ANI). (GCXI-4624)
- New dashboards provide weekly views of contact center activity. These dashboards are found in the Dashboards folder, and are duplicated in the Agents, Business Results, Designer, and Queues folders, as appropriate:
  - Weekly Agent Group Performance Dashboard Explore weekly interaction handling at the group level on a weekly basis.
  - Weekly Agent Group Utilization Dashboard Understand how agents used their time over the course of a week.
  - Weekly Business Attribute Dashboard Explore interaction business-result categorization on a weekly basis.
  - Weekly Queue Summary Dashboard Assess the weekly performance of configured gueues.
  - Weekly Self Service Containment Dashboard Explore the volume of interactions that are (or are not) contained in Self-Service. (GCXI-4742)
- **SAML support** Genesys CX Insights now supports SAML. When configured, this feature allows you to use SAML server to provide authentication to Genesys CX Insights. This functionality is provided as a preview feature. For more information, see *SSO for Genesys CX Insights*. (GCXI-4081)
- Several attributes and prompts are renamed for greater clarity. Attributes and prompts that were previously referred to as *Resource ID* and *Last Resource ID* are now referred to as *Employee ID* and *Last Employee ID*, respectively, in the following reports:
  - Resource Performance Report
  - Resource Performance Dashboard
  - Task Detail Report
  - Task Work Detail Report

For more information, see the Genesys CX Insights 9.0 Projects Reference Guide. (GCXI-4757)

## Genesys CX Insights 9.0.016

#### · iWD Reporting enhancements

- The Media Type attribute is used to distinguish different media types (such as workitem or email). It is added to the following reports: Capture Point Business Value, Capture Point Task Duration, Customer Segment Service Level, Intraday Process, Resource Performance, Task Age, Task Detail, Task Work Detail Report.
- The **Media Type** prompt enables users to filter by different media types. It is added to reports containing the **Media Type** attribute and to the following dashboards: Capture Point, Customer Segment Service Level, Intraday Process, Resource Performance, Task Age Dashboard.
- The **Interaction Type** and **Interaction Subtype** attributes enable data to be organized by interaction type and interaction subtype. It is added to Task Detail, Task Work Detail Resource Performance Report.
- The **Interaction Type** prompt allows Task Detail, Task Work Detail and Resource Performance Report to be filtered by Interaction Type.

For more information, see CX Insights for iWD reports and dashboards. (CIWD-784)

#### Designer reporting enhancements:

- **Bot Analytical Dashboard** This new dashboard appears in the Dashboards and Designer folders. It provides detailed reporting on bot activity during interaction flows that involve Genesys Designer applications, and contrasts self service sessions with and without bot participation, which can help you understand how bots impact the customer experience. (GCXI-3669)
- **Final Disposition Dashboard** This new dashboard appears in the Dashboards and Designer folders. It provides detailed information that you can use to understand trends in interaction outcomes by exploring how key KPIs change over time. (GCXI-3447)

For more information, see the Designer reports page.

 LDAP support — Genesys CX Insights now supports LDAP. This functionality is provided as a preview feature. For more information, see the SSO for Genesys CX Insights page. (GCXI-4080)

## Genesys CX Insights 9.0.014

- Support is added for two additional Language Packs: Dutch and Polish. See Supported Languages.
- Added new report descriptions:
  - Capture Point Business Value Report
  - · Queue Priority Range Report
  - Task Age Report

- Updated the Task Work Detail Report description, including a change in the name of a metric ("Last Resource ID" is renamed as "Resource ID").
- Updated the Task Age Dashboard description, including a change in the name of a metric ("Pending Underdue" is renamed as "Pending pre SLA").
- Added a revised Troubleshooting project sources section, with information about Direct Connections.

### Genesys CX Insights 9.0.013

- iWD reporting enhancements the following new iWD reports and dashboards are added:
  - Customer Segment Service Level Dashboard
  - · Queue Duration and Priority Dashboard
  - · Task Age Dashboard
  - Task Age Report
- Chat reporting enhancements A new report and dashboard in the Chat folder provide detailed reporting about Interaction acceptance rates and percentages:
  - Interactions Acceptance Report
  - Interactions Acceptance Dashboard
- **Designer reporting enhancements** Three new reports are added to provide detailed reporting about Activities, Assisted-service interactions, and Self-service interactions respectively:
  - Activity Summary Report
  - Assisted Service Interactions by Last Milestone Report
  - Self Service Statistics Report
- **Genesys Predictive Routing enhancements** The following enhancements and corrections are introduced in the Predictive Routing reports:
  - A new metric, Result, is added to the the Predictive Routing Operational Report.
  - In the Predictive Routing Operational Report, the metric "Turnaround Time" is renamed as "Avg Turnaround Time (Fmt)".

## Genesys CX Insights 9.0.012

- Agent Details Activity Report performance enhancements The definition of Free Form SQL in the Agent Details Report is enhanced to provide better database guery performance.
- Predictive Routing Operational Report enhancements Genesys CX Insights now provides more
  detailed reporting about the time that interactions waited for predictive routing scoring to be
  completed, including a new metric (Avg Turnaround Time) in the Predictive Routing Operational Report.

## Genesys CX Insights 9.0.011

- Chat reporting enhancements Two reports, Chat Session Report and Chat Engagement Report, are enabled in the Chat folder.
- Co-browse reporting support Two reports, Co-browse Detail Report and Co-browse Summary Report, are enabled in the Co-browse folder.
- Enhancement to Genesys intelligent Workload Distribution (iWD) reporting including:
  - A new Intraday Process Dashboard, which provides four intraday overviews built on nearly twenty
    metrics, allowing you to view detailed information about completed iWD tasks that were overdue,
    as well as counts, percentages, and averages of completed iWD tasks.
  - Enhancements to the Task Detail Report, including new attributes and metrics that provide more detailed information about many aspects of task handling, including task source, customer segment, product, type, and task status.

## Genesys CX Insights 9.0.010

This release contains the following new features and enhancements:

- **iWD reporting** Eight new reports provide information about contact center interactions involving Genesys Info Mart and intelligent Workload Distribution (iWD): CX Insights for iWD reports:
  - Capture Point Business Value Report
  - Capture Point Task Duration Report
  - Customer Segment Service Level Report
  - Intraday Process Report
  - Queue Priority Range Report
  - Queue Task Duration Report
  - Resource Performance Report
  - Task Detail Report
- Omnichannel reporting A new report is added to provide detailed agent activity reporting across all media channels:
  - · Agent Omnichannel Activity Report
- **Enhanced agent group reporting** A new report is added to provide information about how agents are distributed among agent groups:
  - Agent Group Membership Details Report
- **Expanded Localization Support** GCXI now supports displaying the reports and user interface in two additional languages: Arabic and Korean. See Supported Languages.
- **New logging capabilities** Genesys CX Insights now provides detailed logging information for selected components. For more information, see Accessing log information.
- Focus Time reporting Two new metrics, Focus and Focus Time, are added to the following CX

Insights project folders: GCXI/Agent/Activity, GCXI/Agent/Activity/Queue, and GCXI/Business Attribute/BA Customer. These metrics can be used in Agents and Business Results reports.

## Genesys CX Insights 9.0.009

This release contains the following new features and enhancements:

- **Genesys Task Routing reporting** This release adds support for reporting on Genesys Task Routing (GTR), including two new dashboards:
  - · Task Volume Dashboard
  - · Agent Task Dashboard
- **Co-browse reporting** This release adds support for reporting on Co-browse sessions, including more than twenty new metrics, and two new reports:
  - · Co-browse Detail Report
  - Co-browse Summary Report

Reports in the Co-browse folder are on supported for Genesys Engage cloud deployments only.

- **Enhanced Queues reporting** A new report, Speed of Accept (Seconds), is added. This is similar to the existing Speed of Accept (Hours) report, but is more appropriate for media types for which contact center responses are expected to be fast, such as voice and chat.
- **Localization Support** GCXI now supports displaying the reports and user interface in several languages in addition to US English.
- The Interaction Flow Report now provides two new prompts: Target Agent and Target Queue.

## Genesys CX Insights 9.0.007

This is the initial release of Genesys Customer Experience Insights (CX Insights).

## Other Changes

For information about other changes since the initial release, refer to the *New in 9.0.0* and *9.0 Product Alerts* links on the Genesys CX Insights page.

## Managing the MicroStrategy environment



MicroStrategy Developer

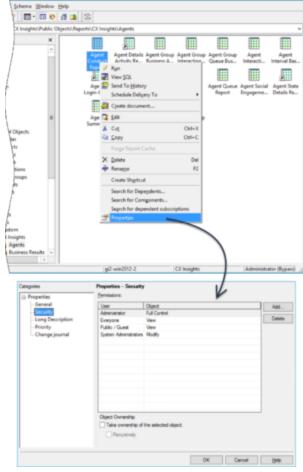
This page describes the MicroStrategy environment, and introduces MicroStrategy Developer, a web-based application that you can use to perform management activities. Other pages in this document discuss using MicroStrategy Developer to customize or create metrics or attributes. This page describes key administrative tasks you can perform using MicroStrategy Developer. For more information, or for information about other administrative tasks, see the MicroStrategy System Administration Help.

#### **Important**

In keeping with Genesys' commitment to diversity, equality, and inclusivity, beginning with release 9.0.019.01, some pod names are changed; this document refers to "gcxi-primary" and "gcxi-secondary" pods. In release 9.0.019.00 and earlier, these pods were named "gcxi-master" and "gcxi-slave".

The figure *MicroStrategy Developer* shows the MicroStrategy Developer Welcome screen, which summarizes the most popular tasks that administrators perform with this tool.

## Managing Folders



Setting Folder Permissions Within Developer

MicroStrategy software uses a hierarchy of folders to organize repository documents. You control access to these folders, and to specific items within them, by setting permissions. Subfolders of the CX Insights root folder house report and documentation subfolders. To set security permissions for an object or folder, right click and choose **Properties**, as shown in the figure *Setting Folder Permissions Within Developer*.

A MicroStrategy installation deploys many default folders that are not used by all GCXI report users. As the MicroStrategy administrator, you can optionally hide these folders to avoid confusion. To hide folders from select groups of users, apply **no-access** levels to those groups within the security profile of the folder's properties.

For additional information, refer to the Setting Access at the object level section of the Genesys CX Insights Deployment Guide.

## Managing Connections

The Genesys CX Insights installation routine copies a database connection object when it imports the CX Insights Project into the MicroStrategy repository. Genesys recommends that you modify this connection connection so that it links the CX Insights Project with your data source (your Info Mart database). Refer to the Post-Installation steps section of the Genesys CX Insights Deployment Guide for step-by-step instructions on how to link the CX Insights Project to your Data Mart.

## Managing the CX Insights Project

You control which users have write access to the CX Insights Project by setting user permissions appropriately in MicroStrategy Developer. Extend this permission only to those users who need it; editing the project can affect report results for all who receive them. See the reports descriptions for information about which metrics of the CX Insights Project are directly used in the Genesys CX Insights reports.

## Managing Users, Groups, and Privileges

To control what objects in the MicroStrategy repository are available to other *users* in your contact center, set up MicroStrategy accounts for users who will access the system, and assign the users to *groups*, which causes the users to inherit *privileges* from the groups. Assign users using either of the following methods:

- Assign users to the predefined CX Insights user groups using the predefined access levels.
- Assign users to groups that you create with custom permissions.

For instructions on how to assign users in a MicroStrategy environment, refer to Managing MicroStrategy Users and MicroStrategy Security Roles. For more information about access restrictions, see About Integrated Data Access Restrictions.

Video: Changing your own password

#### Link to video

This video describes how to change your own password, if your permissions allow it. Note that some steps shown in this video can vary slightly depending on the release of Genesys CX Insights you have installed.

Video: Managing users

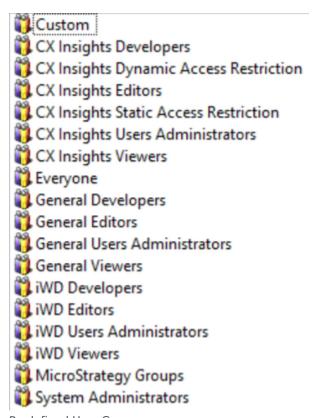
#### Link to video

This video describes how to manage users, including how to:

- · create users
- · delete users
- change users' passwords
- · change users' permissions

Note that some steps shown in this video can vary slightly depending on the release of Genesys CX Insights you have installed.

## Predefined User Groups



Predefined User Groups

When you create a user, you must add them to at least one user group, thereby controlling the user's ability to work with reports and dashboards. Normally, you can do this by assigning users to the predefined user groups described in this section.

#### Predefined user groups and privileges

If you require permissions different from those assigned to the predefined groups, Genesys recommends that you avoid modifying privileges for the predefined user groups, because these user groups are overwritten during upgrades. Instead, create custom groups by duplicating the user group you wish to modify, and edit the duplicate group. Note that the group structure in release 9.0.011 and later is unlike earlier releases of the software, and each group contains only users (and does not contain other groups).

Groups	Summary	Project Access Level*
Custom	Customer-defined user groups.	User-defined
CX Insights Developers	Members of this groups can create, edit, or view objects in the Genesys CX Insights project.	Genesys CX Insights
CX Insights Dynamic Access Restrictions	Security Filter you can use to restrict access to data based on user name, geographical location, line of business, or organizational role.	Genesys CX Insights
CX Insights Editors	Members of this groups can edit or view objects in the Genesys CX Insights project.	Genesys CX Insights
CX Insights Static Access Restrictions	Security Filter you can use you prevent members of specified user groups from viewing data for a list of objects you specify.	Genesys CX Insights
CX Insights User Administrators	Members of this group can manage users in the Genesys CX Insights project.	Genesys CX Insights
CX Insights Viewers	Members of this groups can view objects in the Genesys CX Insights project.	Genesys CX Insights
Everyone	The Everyone group provides a way for you to easily apply privileges, security role memberships, or permissions to all users. All users are automatically members of this group.	none
General Developers	Members of this group can create, edit, and view objects in any project.	all
General Editors	Members of this group can edit and view objects in any project.	all
General User Administrators	Members of this group can manage users in any project.	all
General Viewers	Members of this group can view objects in any project.	all
iWD Developers	Members of this group can create, edit, and view objects in	iWD

Groups	Summary	Project Access Level*
	the CX Insights for iWD project.	
iWD Editors	Members of this group can edit and view objects in the CX Insights for iWD project.	iWD
iWD User Administrators	Members of this group can manage users in the CX Insights for iWD project.	iWD
iWD Viewers	Members of this group can view objects in the CX Insights for iWD project.	iWD
MicroStrategy Groups	Built-in groups that are included in all MicroStrategy deployments.	none
System Administration	Members of this group have unrestricted management capabilities.	all

Some groups provide access only to a specific project:

- 'CX Insights' membership in groups with this prefix allows users to work within the Genesys CX Insights project only.
- 'General' membership in groups with this prefix allows users to work in any project.
- 'iWD' membership in groups with this prefix allows users to work within the iWD project only.

## Permissions needed to manage other users

To manage the accounts of other users, you must be a member of one of the *Administrator* user groups described in the following table, which describes the types of accounts each of the Administrator types can manage, and the actions they can carry out on each.

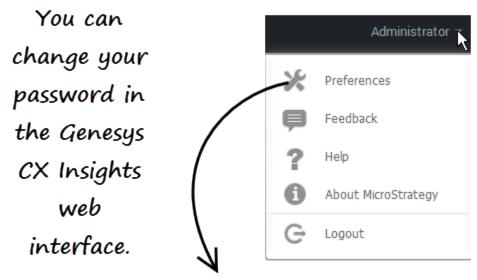
The following table describes the permissions needed to manage users.

Table: User management capabilities

Managing Group	Administrator	General Users Administrators	CX Insights Users Administrators	iWD Users Administrators
Managed Group				
Custom	Full Control	Full Control	Full Control	Full Control
MicroStrategy Groups	Full Control	No Access	No Access	No Access
System Administrators	Full Control	No Access	No Access	No Access
Everyone	Full Control	View / Modify / Modify children	View / Modify / Modify children	View / Modify / Modify children
General	Full Control	View / Modify /	No Access	No Access

Developers		Modify children		
General Editors	Full Control	View / Modify / Modify children	No Access	No Access
General Viewers	Full Control	View / Modify / Modify children	No Access	No Access
General Users Administrators	Full Control	View / Modify / Modify children	No Access	No Access
CX Insights Static Access Restriction	Full Control	View / Modify / Modify children	View / Modify children	No Access
CX Insights Dynamic Access Restriction	Full Control	View / Modify / Modify children	View / Modify children	No Access
CX Insights Developers	Full Control	View / Modify / Modify children	View / Modify / Modify children	No Access
CX Insights Editors	Full Control	View / Modify / Modify children	View / Modify / Modify children	No Access
CX Insights Viewers	Full Control	View / Modify / Modify children	View / Modify / Modify children	No Access
CX Insights Users Administrators	Full Control	View / Modify / Modify children	View / Modify / Modify children	No Access
iWD Developers	Full Control	View / Modify / Modify children	No Access	View / Modify / Modify children
iWD Editors	Full Control	View / Modify / Modify children	No Access	View / Modify / Modify children
iWD Viewers	Full Control	View / Modify / Modify children	No Access	View / Modify / Modify children
iWD Users Administrators	Full Control	View / Modify / Modify children	No Access	View / Modify / Modify children

## Changing your own password





Use the following steps to change your password. Not all users are permitted to change their password; contact your administrator to find out if the functionality described on this page is available for your use.

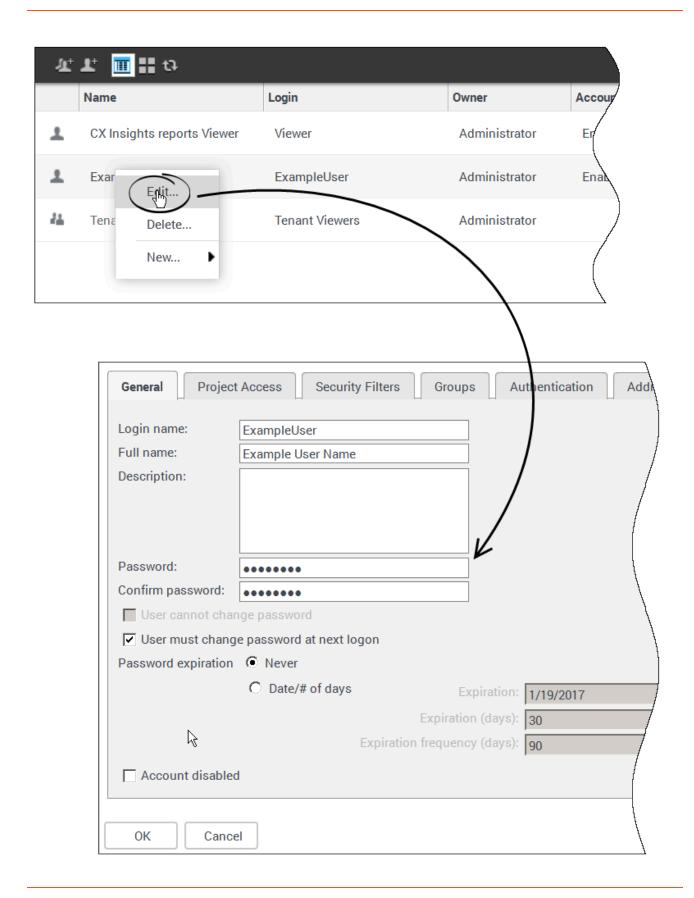
### **Important**

If you have forgotten your password, or otherwise cannot log in in, contact your

administrator / next level of support.

- 1. Log in to MicroStrategy Web.
- 2. On the menu bar, click your user name, and click **Preferences**.
- 3. Click **Change Password**.
- 4. In the **Old Password** field, type your current password.
- 5. In the **New Password** field, type your new password, and re-type it in the **New Password Verification** field.
- 6. Click **Change Password**.

Changing another user's password



Use the following steps to change a password for another user (for example when they have forgotten their password) or to otherwise manage an existing user account.

To edit another user's account, you must log in as a member of a group that has the **Create And Edit Users And Groups** privilege.

#### Tip

For users who are created without membership in any group other than Everyone, only the administrator who created the user can change the user's password. New users must always be members of at least one group, other than Everyone.

1. In your web browser, open the MicroStrategy Web Administrator page:

http://<hostname>:<port>/MicroStrategy/servlet/mstrServerAdmin

- 2. On the page that appears, select your server.
- 3. On the MicroStrategy Web Administrator login screen, enter your user name and current password, and click **Login**. The **Tools** page opens.
- 4. Click **User Manager**.
- 5. Click a group of which the user is a member. A list appears, showing all the users in that group.
- 6. Right-click the user's name, and in the menu, click Edit.
- 7. In the **Password** field, enter the new password, and enter it again in the **Confirm Password** field.
- 8. Select User must change password at next login, and make any other changes if required.
- 9. Click **OK**.

### Change administrator passwords

Genesys recommends that you change the default administrator password.

## Procedure: Changing the MicroStrategy Administrator password

**Purpose:** Use this procedure to create a new password for the default MicroStrategy Administrator account.

#### Steps

- Open the gcxi.properties file for editing. Note: If you use gcxi-secrets.yaml to store secrets, edit it instead of gcxi.properties in this procedure, and, after step 3, delete and recreate your secrets, by executing kubectl delete -f k8s/gcxi-secrets.yaml and kubectl create -f k8s/gcxi-secrets.yaml.
- 2. Enter values in the following fields:

```
MSTR_PASSWORD_OLD=<old_password>
```

MSTR\_PASSWORD=<new\_password>

where:

password> is the existing password.

<new\_password> is a the password.

3. Enter the following commands to delete and reload configmap gcxi-config

```
kubectl delete configmap gcxi-config
```

kubectl create configmap gcxi-config --from-env-file=<path>/gcxi.properties -namespace genesys

where:

<path> is the path to the directory where your **gcxi.properties** file is stored.

4. Enter the following commands to stop currently running containers:

```
kubectl scale deploy/gcxi-secondary --replicas=0
kubectl scale deploy/gcxi-primary --replicas=0
```

5. Enter the following commands to start the containers:

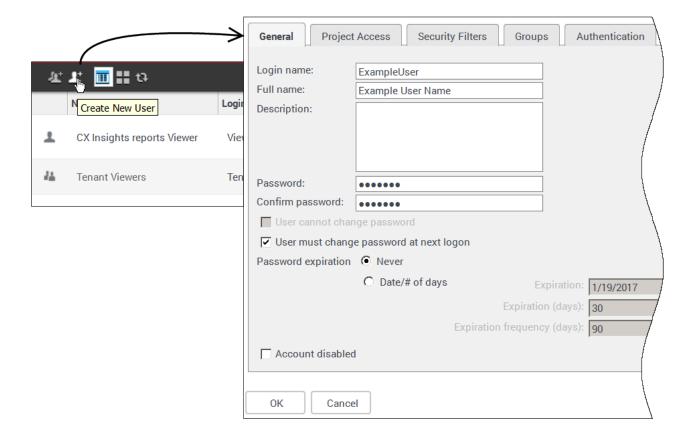
```
kubectl scale deploy/gcxi-primary--replicas=1
kubectl scale deploy/gcxi-secondary --replicas=1
```

- 6. Open the **gcxi.properties** file for editing.
- 7. Once both pods are running, log in the Genesys CX Insights web interface with the new password.

## Creating a new user

To simplify the process of creating a new user, select the group (for example, CX Insights reports Viewers) - before you click Create New User.





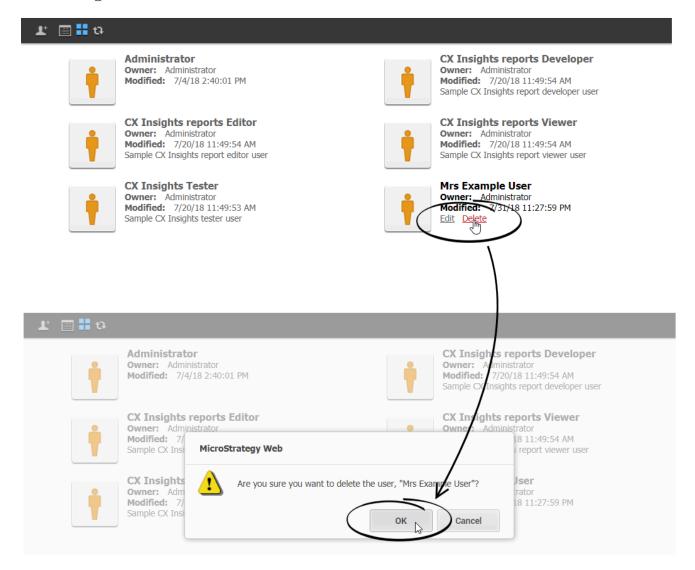
Use the following steps to create a new user account.

To edit another user's account, you must log in as a member of a group that has the Create And

#### **Edit Users And Groups** privilege.

- 1. In your web browser, open the MicroStrategy Web Administrator page:
  - http://<hostname>:<port>/MicroStrategy/servlet/mstrServerAdmin
- 2. On the page that appears, select your server.
- 3. On the MicroStrategy Web Administrator login screen, enter your user name and current password, and click **Login**. The **Tools** page opens.
- 4. Click User Manager.
- 5. On the menu, click Create New User.
- 6. Specify user information as appropriate, on each tab in the editor. If you need more information about any field, see the MicroStrategy Web Administrator Help. Be sure to:
  - 1. Include a **Login Name**, **Full Name**, **Password**, **Confirm Password** and other selections in accordance with your password policies (on the **General** tab).
  - 2. Assign at least one **Group** (on the **Groups** tab). By default, all users are also members of the group **Everyone**, but you must assign at least one group, or the new user account will not be editable by other administrators.
- 7. Click **OK**.
- 8. To verify that the user was created, open one of the groups to which you added the user (or open the group **Everyone**).

### Deleting a user



Use the following steps to delete a user account.

To edit another user's account, you must log in as a member of a group that has the **Create And Edit Users And Groups** privilege.

- 1. In your web browser, open the MicroStrategy Web Administrator page:
  - http://<hostname>:<port>/MicroStrategy/servlet/mstrServerAdmin
- 2. On the page that appears, select your server.
- 3. On the MicroStrategy Web Administrator login screen, enter your user name and current password, and click **Login**. The **Tools** page opens.
- 4. Click User Manager.

- 5. Open a group of which the user is a member, for example **Everyone**.
- 6. Hover over the user you plan to delete, and click **Delete**.
- 7. Click **OK**.

For more information, see the MicroStrategy web site.

## SSO for Genesys CX Insights

### Warning

**Special Support Statement** LDAP and SAML functionality is provided as a preview feature. Genesys will support it to the best of our efforts, however we cannot guarantee it works in all configurations. The customer is responsible for testing everything in a lab/test environment before making any plans for production deployment.

#### **Important**

In keeping with Genesys' commitment to diversity, equality, and inclusivity, beginning with release 9.0.019.01, some pod names are changed; this document refers to "gcxi-primary" and "gcxi-secondary" pods. In release 9.0.019.00 and earlier, these pods were named "gcxi-master" and "gcxi-slave".

You can optionally configure Genesys CX Insights to use LDAP or SAML. Single sign-on (SSO) allows logged-in users to navigate across multiple applications without re-entering their credentials. This page provides example steps that may require modification to suit your environment; contact Genesys Professional Services if you need further assistance:

- Enable and configure SAML / Manage SAML
- Enable and configure LDAP / Manage LDAP

## Enable and configure SAML

To enable SAML, complete one of the procedures in this section:

- Enable SAML in deployments that use Helm
- Enable SAML in deployments that use Kubernetes descriptors

## Procedure: Enable SAML in deployments that use Helm

**Purpose:** Enable SAML in scenarios where you deploy Genesys CX Insights with Kubernetes using Helm or OpenShift using Helm.

#### Prerequisites

#### Before you begin:

- GCXI release 9.0.019.00 or later is deployed in your environment. GCXI serves as the SAML service provider (SP).
- You have access to a SAML Identity provider (IdP).
- This procedure assumes that the default namespace is **gcxi**. (If yours is not, then you must add **-n gcxi** to all kubectl commands.)

#### Steps

1. Execute the following command to back up the GCXI meta database:

```
helm upgrade <release_name> <path_to_chart> --reuse-values --set gcxi.deployment.deployJobBackup=true where:
```

- <release\_name> GCXI Helm release name.
- <path\_to\_chart> the path to the Helm chart files.

#### For example:

helm upgrade gcxi-helm gcxi/ --reuse-values --set gcxi.deployment.deployJobBackup=true

- 1. Wait until job gcxi-backup is finished.
- 2. Execute the following command to stop one container:

```
helm upgrade -f <values_file> --set gcxi.replicas.worker=1 <release_name> <path_to_chart>
where:

<values_file> — the name of your values YAML file. This is typically the same file you used when you deployed using the instructions on:
Genesys CX Insights - Kubernetes using Helm.

<release_name> — GCXI Helm release name.

<path_to_chart> — the path to the Helm chart files.

For example:
```

helm upgrade -f values-test.yaml --set gcxi.replicas.worker=0 gcxi-helm gcxi/

3. Generate SAML configuration files — follow the instructions on the MicroStrategy website: How to Generate configuration files, but note the

- following:
- Where the instructions on the MicroStrategy website ask for an entity base URL, use: http://<server>:<port>/MicroStrategy/saml/config/open. This URL works in many scenarios, but if it does not for example, because your environment uses a reverse proxy or load balancer see the MicroStrategy documentation.
- You must connect using the Tomcat administrator credentials that you set using the gcxi.env.TOMCAT\_ADMINPWD variable during installation. If you did not set a password, you can set one during upgrade, or contact Customer Care for assistance.
- 4. Execute the following command and examine the results to ensure that SAML-related files appear inside the running pod:

```
kubectl exec gcxi-0 -- ls /opt/tomcat/webapps/MicroStrategy/WEB-INF/classes/resources/SAML
```

5. In a convenient location, create an empty directory called **saml\_folder**. (You can optionally use another name, but this procedure assumes you used the name **saml\_folder**.)

6. Copy the SAML configuration files from the pod to the saml folder directory:

```
kubectl cp gcxi-0:/opt/tomcat/webapps/MicroStrategy/WEB-INF/classes/resources/SAML/ saml_folder
Check that files are copied successfully into the saml_folder, and that no other files are present in the directory.
```

- 7. Using the saml folder/SPMetadata.xml file, register with the IdP the exact steps vary depending on your IdP.
- 8. Copy the **IDPMetadata.xml** file provided by your IdP into the **saml\_folder**.
- 9. Ensure that the **saml\_folder** directory contains the following files:

custom
IDPMetadata.xml
MstrSamlConfig.xml
SamlKeystore.jks
SPMetadata.xml
SpringSAMLConfig.xml

Genesys CX Insights does not use the custom folder.

10. Execute the following command to create a new config map - gcxi-saml:

```
kubectl create cm gcxi-saml --from-file saml folder
```

Once this is complete, delete the **saml\_folder** as it is no longer required.

11. Edit the **gcxi.properties** file add the following variables to enable SAML and set it as default login mode:

```
MSTR_WEB_SAML_ON=true
MSTR_WEB_DEFAULT_LOGIN_MODE= 1048576
```

12. Execute the following commands to stop the gcxi pod:

```
helm upgrade -f <values_file> --set gcxi.replicas.worker=0 <release_name> <path_to_chart>
where:
```

```
<values_file> — the name of your values YAML file. This is typically the same file you used when you deployed using the instructions on:
         Genesys CX Insights - Kubernetes using Helm.
         <release name> — GCXI Helm release name.
         <path_to_chart> — the path to the Helm chart files.
         For example:
         helm upgrade -f values-test.yaml --set gcxi.replicas.worker=0 gcxi-helm gcxi/
         Wait until pods are stopped before proceeding.
13. Execute the following commands to upgrade GCXI (using values from gcxi.properties to set container variables):
         helm upgrade -f <values file> --set-file gcxi.envext=gcxi.properties <release name> <path to chart>
         where:
         <values file> — the name of your values YAML file. This is typically the same file you used when you deployed using the instructions on:
         Genesys CX Insights - Kubernetes using Helm.
         <release name> — gcxi helm release name.
         <path_to_chart> — the path to the Helm chart files.
         For example:
         helm upgrade -f values-test.yaml --set-file gcxi.envext=gcxi.properties gcxi-helm gcxi/
         Wait while GCXI is installed.
14. Open MicroStrategy Web (http://<server>:<port>/MicroStrategy/servlet/mstrWeb); you will be automatically forwarded to the SAML IdP login page.
```

## Procedure: Enable SAML in deployments that use Kubernetes descriptors

Purpose: Enable SAML in environments where you deploy GCXI using Kubernetes descriptors.

#### Prerequisites

#### Before you begin:

- GCXI release 9.0.019.00 or later is deployed in your environment. GCXI serves as the SAML service provider (SP).
- You have access to a SAML Identity provider (IdP).
- This procedure assumes that the default namespace is **genesys**. (If yours is not, then you must add -n genesys to all kubectl commands.)

#### Steps

1. Execute the following command to back up the GCXI meta database:

```
kubectl apply -f k8s/gcxi-backup.yaml
```

Wait until job gcxi-backup is finished.

2. Execute the following command to stop one GCXI container:

```
kubectl scale --replicas=0 deployment gcxi-secondary
```

- 3. Generate SAML configuration files follow the instructions on the MicroStrategy website: How to Generate configuration files, but note the following:
  - Where the instructions on the MicroStrategy website ask for an *entity base URL*, use: http://<server>:<port>/MicroStrategy/saml/config/open.
  - You must connect to http://<server>:<port>/MicroStrategy/saml/config/open using Tomcat administrator credentials. You can change the

Tomcat admin password by setting the variable TOMCAT\_ADMINPWD (see Procedure: Configuring Kubernetes Secrets) or contact Customer Care for assistance.

4. Execute the following command and examine the results to ensure that SAML-related files appear inside the running pod:

```
kubectl exec $(kubectl get po -o name | grep gcxi-primary) -- ls /opt/tomcat/webapps/MicroStrategy/WEB-INF/classes/
resources/SAML
```

- 5. In a convenient location, create an empty directory called **saml\_folder**. (You can optionally use another name, but this procedure assumes you used the name **saml\_folder**.)
- 6. Copy the SAML configuration files from the pod to the saml folder directory:

```
kubectl cp $(kubectl get pod -l role=gcxi-primary -o jsonpath="{.items[0].metadata.name}"):/opt/tomcat/webapps/
MicroStrategy/WEB-INF/classes/resources/SAML/ saml folder
```

Check that files are copied successfully into the saml\_folder, and that no other files are present in the directory.

- 7. Using the saml folder/SPMetadata.xml file, register with the IdP the exact steps vary depending on your IdP.
- 8. Copy the **IDPMetadata.xml** file provided by your IdP into the saml\_folder.
- 9. Ensure that the saml folder directory contains the following files:

custom
IDPMetadata.xml
MstrSamlConfig.xml
SamlKeystore.jks
SPMetadata.xml
SpringSAMLConfig.xml

Genesys CX Insights does not use the custom folder.

10. Execute the following command to create a new config map - gcxi-saml:

kubectl create cm gcxi-saml --from-file saml\_folder

Once this is complete, delete the saml folder as it is no longer required.

11. Edit the **gcxi.properties** file add the following variables to enable SAML and set it as default login mode:

```
MSTR_WEB_SAML_ON=true
MSTR_WEB_DEFAULT_LOGIN_MODE= 1048576
```

12. Execute the following commands to recreate the **gcxi-config** configmap:

```
kubectl delete cm gcxi-config
kubectl create cm gcxi-config --from-env-file k8s/gcxi.properties
```

13. Edit the **gcxi.yaml** file and add gcxi-saml volume and volumeMount to definition of gcxi-secondary and gcxi-primary deployments:

14. Execute the following commands to recreate the gcxi pods and thereby apply the **gcxi.yaml** changes:

```
kubectl delete -f k8s/gcxi.yaml
kubectl create -f k8s/gcxi.yaml
```

Wait while GCXI is installed.

15. Open MicroStrategy Web (http://<server>:<port>/MicroStrategy/servlet/mstrWeb); you will be automatically forwarded to the SAML IdP login page.

## Manage SAML

If you've enabled SAML, use the information in this section to manage it.

- Disable SAML in deployments that use Helm
- Disable SAML in deployments that use Kubernetes descriptors

Procedure: Disable SAML in deployments that use Helm

**Purpose:** Disable SAML when GCXI is deployed using Helm.

Prerequisites

This procedure assumes that the default namespace is **gcxi**. (If yours is not, then you must add **-n gcxi** to all kubectl commands.)

### Steps

1. Execute the following commands to stop GCXI:

```
helm upgrade -f <values_file> --set gcxi.replicas.worker=0 <release_name> <path_to_chart>
where:

<values_file> — the name of your values YAML file. This is typically the same file you used when you deployed using the instructions on:
Genesys CX Insights - Kubernetes using Helm.

<release_name> — GCXI Helm release name.

<path_to_chart> — the path to the Helm chart files.
```

#### For example:

```
helm upgrade -f values-test.yaml --set gcxi.replicas.worker=0 gcxi-helm gcxi/
```

2. Execute the following commands to upgrade GCXI (using values from **gcxi.properties** to set container variables) and restart the pods:

```
helm upgrade -f <values_file> <release_name> <path_to_chart>
```

#### where:

<values\_file> — the name of your values YAML file. This is typically the same file you used when you deployed using the instructions on:
Genesys CX Insights - Kubernetes using Helm.

<release\_name> — GCXI Helm release name.

<path\_to\_chart> — the path to the Helm chart files.

#### For example:

helm upgrade -f values-test.yaml gcxi-helm gcxi/

Wait while GCXI is upgraded.

Procedure: Disable SAML in deployments that use Kubernetes descriptors

Purpose: Disable SAML when GCXI is deployed using Kubernetes descriptors.

### **Prerequisites**

This procedure assumes that the default namespace is **gcxi**. (If yours is not, then you must add **-n gcxi** to all kubectl commands.)

### Steps

1. Edit the **gcxi.properties** file, and remove the following variables:

```
MSTR_WEB_SAML_ON=true
MSTR_WEB_DEFAULT_LOGIN_MODE= 1048576
```

2. Execute the following commands to recreate the gcxi-config configmap:

```
kubectl delete cm gcxi-config
kubectl create cm gcxi-config --from-env-file k8s/gcxi.properties
```

3. Execute the following commands to recreate the gcxi pods:

```
kubectl delete -f k8s/gcxi.yaml
kubectl create -f k8s/gcxi.yaml
```

## Update SAML

If you enabled SAML in Genesys CX Insights 100.0.026.0000 or earlier, follow the instructions in this section before upgrading Genesys CX Insights. If you enabled SAML in Genesys CX Insights 100.0.026.0001 or later, ignore this section.

- UpdateSAML in deployments that use Helm
- Update SAML in deployments that use Kubernetes descriptors

Procedure: Update SAML in deployments that use Helm

**Purpose:** Update SAML when GCXI is deployed using Helm.

Prerequisites

This procedure assumes that the default namespace is **gcxi**. (If yours is not, then you must add **-n gcxi** to all kubectl commands.)

Steps

If **SpringSAMLConfig.xml** *is not* customized in your existing deployment:

1. Execute the following command to edit **gcxi-saml** ConfigMap file:

```
kubectl edit cm gcxi-saml
```

- 2. Remove SpringSAMLConfig.xml, and save the file.
- 3. Execute the following command to verify that **gcxi-saml** contains now four variables:

```
kubectl get cm gcxi-saml
```

The output should be similar to the following:

```
NAME DATA AGE gcxi-saml 4 127m
```

- 4. Upgrade Genesys CX Insights using the steps in Upgrade GCXI using Helm.
- OR, if **SpringSAMLConfig.xml** is customized in your existing deployment, use the following steps:
- 1. Execute the following command to back up the **SpringSAMLConfig.xml** file:

kubectl cp gcxi-0:/opt/tomcat/webapps/MicroStrategy/WEB-INF/classes/resources/SAML/SpringSAMLConfig.xml
SpringSAMLConfig.xml backup

2. Execute the following command to edit **gcxi-saml** ConfigMap file:

```
kubectl edit cm gcxi-saml
```

- 3. Remove SpringSAMLConfig.xml, and save the file.
- 4. Execute the following command to verify that **gcxi-saml** contains now four variables:

```
kubectl get cm gcxi-saml
```

The output should be similar to the following:

```
NAME DATA AGE gcxi-saml 4 127m
```

- 5. Complete the steps in **Upgrade GCXI using Helm**. Wait until pods are running before your continue with this procedure. Note that the updated version of **SpringSAMLConfig.xml** is created inside gcxi containers.
- 6. Execute the following command to copy the SAML configuration files from the pod to a temporary location:

```
kubectl cp gcxi-0:/opt/tomcat/webapps/MicroStrategy/WEB-INF/classes/resources/SAML/ <saml_folder_upgrade>
where < saml_folder_upgrade> is a temporary folder.
```

7. Verify that the destination folder contains the following files (the custom folder is not used):

```
custom
IDPMetadata.xml
MstrSamlConfig.xml
SamlKeystore.jks
SPMetadata.xml
SpringSAMLConfig.xml
```

8. Using the instructions in <a href="Upgrade">Upgrade</a> a Customized SAML System, edit <saml\_folder\_upgrade>/SpringSAMLConfig.xml.

9. Execute the following commands to recreate **gcxi-saml** ConfigMap:

```
kubectl delete cm gcxi-saml
kubectl create cm gcxi-saml --from-file saml folder upgrade
```

This adds SpringSAMLConfig.xml to the gcxi-saml file.

10. Restart the pod.

Procedure: Update SAML in deployments that use Kubernetes

Purpose: Update SAML when GCXI is deployed using Kubernetes descriptors.

**Prerequisites** 

This procedure assumes that the default namespace is **gcxi**. (If yours is not, then you must add **-n gcxi** to all kubectl commands.)

Steps

If **SpringSAMLConfig.xml** *is not* customized in your existing deployment:

1. Execute the following command to edit **gcxi-saml** ConfigMap file:

```
kubectl edit cm gcxi-saml
```

2. Remove SpringSAMLConfig.xml, and save the file.

3. Execute the following command to verify that **gcxi-saml** contains now four variables:

```
kubectl get cm gcxi-saml
```

The output should be similar to the following:

```
NAME DATA AGE gcxi-saml 4 127m
```

- 4. Upgrade Genesys CX Insights using the steps in Upgrading Genesys CX Insights.
- OR, if **SpringSAMLConfig.xml** is customized in your existing deployment, use the following steps:
- 1. Execute the following command to back up the **SpringSAMLConfig.xml** file:

kubectl cp gcxi-0:/opt/tomcat/webapps/MicroStrategy/WEB-INF/classes/resources/SAML/SpringSAMLConfig.xml
SpringSAMLConfig.xml backup

2. Execute the following command to edit **gcxi-saml** ConfigMap file:

- 3. Remove SpringSAMLConfig.xml, and save the file.
- 4. Execute the following command to verify that **gcxi-saml** contains now four variables:

```
kubectl get cm gcxi-saml
```

The output should be similar to the following:

5. Complete the steps in Upgrading Genesys CX Insights. Wait until pods are running before your continue with this procedure. Note that the updated version of **SpringSAMLConfig.xml** is created inside the gcxi container.

6. Execute the following command to copy the SAML configuration files from the pod to a temporary location:

```
kubectl cp gcxi-0:/opt/tomcat/webapps/MicroStrategy/WEB-INF/classes/resources/SAML/ <saml_folder_upgrade>
where < saml_folder_upgrade> is a temporary folder.
```

7. Verify that the destination folder contains the following files (the custom folder is not used):

custom
IDPMetadata.xml
MstrSamlConfig.xml
SamlKeystore.jks
SPMetadata.xml
SpringSAMLConfig.xml

- 8. Using the instructions in <a href="Upgrade">Upgrade</a> a <a href="Customized SAML System">Customized SAML System</a>, edit <saml\_folder\_upgrade>/SpringSAMLConfig.xml.
- 9. Execute the following commands to recreate **gcxi-saml** ConfigMap:

```
kubectl delete cm gcxi-saml
kubectl create cm gcxi-saml --from-file saml_folder_upgrade
```

This adds SpringSAMLConfig.xml to the gcxi-saml file.

10. Restart the pods.

## Enable and configure LDAP

To enable LDAP, complete one of the procedures in this section:

- Enable LDAP in deployments that use Helm
- Enable LDAP in deployments that use Kubernetes descriptors

In either case, you must then complete the section Configure LDAP.

Procedure: Enable LDAP in deployments that use Helm

**Purpose:** Enable LDAP when GCXI is deployed using Helm.

Prerequisites

Ensure that GCXI release 9.0.014.00 or later is deployed in your environment. This procedure assumes that the default namespace is **gcxi**. (If yours is not, then you must add **-n gcxi** to all kubectl commands.)

Steps

Before you begin, complete the following steps to configure GCXI:

- 1. Locate the OpenLDAP library inside the container:
  - 1. Execute the following command to ensure that the OpenLDAP library is installed, and locate the library's path:

```
kubectl exec gcxi-0 -- ldconfig -p | grep ldap
```

- 2. Copy or note the path, for example /usr/lib64/libldap-2.4.so.2.
- 2. Execute the following command to back up the GCXI meta database:

```
helm upgrade <release_name> <path_to_chart> --reuse-values --set gcxi.deployment.deployJobBackup=true where:
```

<release\_name> — GCXI Helm release name.

```
<path_to_chart> — the path to the Helm chart files.
       For example:
       helm upgrade gcxi-helm gcxi/ --reuse-values --set gcxi.deployment.deployJobBackup=true
       Wait until job gcxi-backup is finished.
3. Execute the following command to prevent the backup job from running every time release is upgraded:
       helm upgrade <release_name> <path_to_chart> --reuse-values --set gcxi.deployment.deployJobBackup=false
        where:
        <release_name> — GCXI Helm release name.
        <path_to_chart> — the path to the Helm chart files.
       For example:
       helm upgrade gcxi-helm gcxi/ --reuse-values --set gcxi.deployment.deployJobBackup=false
4. Execute the following command to stop gcxi pods:
       helm upgrade <release name> <path to chart> --reuse-values --set gcxi.replicas.worker=0
       where:
        <release name> — GCXI Helm release name.
        <path to chart> — the path to the Helm chart files.
       For example:
       helm upgrade gcxi-helm gcxi/ --reuse-values --set gcxi.replicas.worker=0
```

Wait until pods are stopped before proceeding.

5. Edit the **gcxi.properties** file and add the following variables to enable LDAP and set it as default login mode:

```
MSTR_WEB_LDAP_ON=true
MSTR_WEB_DEFAULT_LOGIN_MODE=16
```

Add no comments, extra spaces, or blank lines.

6. Execute the following command to upgrade and restart GCXI (using values from gcxi.properties to set container variables) and restart the pods:

```
helm upgrade <release_name> <path_to_chart> --reuse-values --set-file gcxi.envext=gcxi.properties --set
gcxi.replicas.worker=2
```

where:

<release\_name> — GCXI Helm release name.

<path to chart> — the path to the Helm chart files.

For example:

helm upgrade gcxi-helm gcxi/ --reuse-values --set-file gcxi.envext=gcxi.properties --set gcxi.replicas.worker=2

Wait while GCXI is upgraded.

LDAP is now enabled in GCXI, and remains enabled after container restart.

Procedure: Enable LDAP in deployments that use Kubernetes descriptors

Purpose: Gather information you will need to configure LDAP, and enable LDAP in GCXI.

### Prerequisites

- GCXI release 9.0.014.00 or later is deployed in your environment
- This procedure assumes that the default namespace is **genesys**. (If yours is not, then you must add **-n genesys** to all kubectl commands.)

### Steps

Before you begin, complete the following steps to configure GCXI:

- 1. Locate the OpenLDAP library inside the container:
  - 1. Execute the following command to ensure that the OpenLDAP library is installed and locate the library's path:

```
kubectl exec $(kubectl get po -o name | grep gcxi-primary) -- ldconfig -p | grep ldap
```

- 2. Copy or note the path, for example /usr/lib64/libldap-2.4.so.2.
- 2. Enable LDAP:
  - 1. Execute the following command to back up the GCXI meta database:

```
kubectl apply -f k8s/gcxi-backup.yaml
```

Wait until job gcxi-backup is finished.

1. Execute the following commands to stop currently running containers:

```
kubectl scale --replicas=0 deployment gcxi-secondary
kubectl scale --replicas=0 deployment gcxi-primary
```

2. Edit the gcxi.properties file, and set MSTR\_WEB\_LDAP\_ON=true.

- 3. To make LDAP the default login mode, edit the gcxi.properties file, and set MSTR\_WEB\_DEFAULT\_LOGIN\_MODE=16
- 4. Execute the following commands to load gcxi.properties into Kubernetes:

```
kubectl delete configmap gcxi-config
kubectl create configmap gcxi-config --from-env-file=k8s/gcxi.properties
```

5. Execute the following command to start the PRIMARY container:

```
kubectl scale --replicas=1 deployment gcxi-primary
```

Wait until PRIMARY is done (wait until Tomcat is up, and MicroStrategyWeb page is available).

6. Execute the following command to start the SECONDARY container:

```
kubectl scale --replicas=1 deployment gcxi-secondary
```

LDAP is now enabled in GCXI, and remains enabled after container restart.

If you plan to use LDAP, you must also mount the folder where your certificates reside. See LDAP with SSL for more information.

## Configure LDAP

For both Helm and Kubernetes deployments, use the instructions in this section to configure LDAP.

Procedure: Configure LDAP connection settings

**Purpose:** To set up a connection to the LDAP server.

### Steps

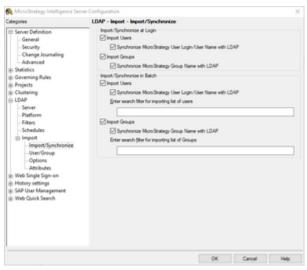
- 1. Log in to MicroStrategy Developer.
- 2. Click Administration > Server > Configure MicroStrategy Intelligence Server.
- 3. Click **LDAP**, and in the **Server** section, fill in the following parameters:
  - Host: <hostname\_or\_ip\_of\_ldap\_server>
  - Port: <port\_of\_ldap\_server>
  - Security connection: Cleartext
  - Authentication method: Binding
  - Authentication User (This user account is used when GCXI has to access Active Directory, make a search, list all users, and so on. It is a 'service user'.)

For example:

- DN: CN=<user\_cn>,OU=<ou>,..., DC=<dc>,...
- Password: <domain password>
- 4. Click **LDAP** > **Platform**, and fill in the following parameters:
  - LDAP server vendor name: <your\_vendor> (for example, Microsoft Active Directory)
  - LDAP Connectivity Driver: <your connectivity driver> (for example, Open LDAP)
  - Intelligence Server platform: Linux
  - LDAP connectivity file names: <path\_to\_openldap\_lib> (This is the path inside the gcxi container, which you discovered in Enable LDAP in deployments that use Kubernetes descriptors.)

- 5. Click **LDAP** > **Filters**, and fill in the following parameters:
  - **Root DN**: DC=<dc>, DC=<dc>... (This is the starting point of the LDAP search.)
  - **User search filter**: <user\_search> (The value you enter here depends on LDAP settings. For example, (&(objectclass= person)(sAMAccountName=#LDAP\_LOGIN#)).)
  - **Group search filter**: <group\_search> (The value you enter here depends on LDAP settings. For example, (&(objectclass=group) (member= #LDAP\_DN#)))
  - Number of group levels above to import: 1
- 6. To verify that the connection between the LDAP server and Intelligence server can be established, attempt to log in to MicroStrategy Web (<IP>/MicroStrategy/servlet/mstrWeb) using LDAP credentials. Note that even when you successfully log in, user privileges are not yet set. Privileges can be manually assigned to each user in mstrServerAdmin, or imported and configured as described in LDAP Import, synchronization and linking.

## LDAP Import, synchronization and linking



LDAP - Import

You must configure privileges for users who log in using LDAP credentials. Detailed information about this step is available in the following MicroStrategy document: KB18506: Importing and linking users using LDAP integration with the MicroStrategy Intelligence Server 9.x and newer.

#### LDAP with SSL

To support SSL with LDAP, you must run the container with a mounted folder containing LDAP certificates, and ensure that the folder is mounted on all servers in the cluster. For more information, see How to configure LDAP connectivity using Clear text.

## Manage LDAP

If you've enabled LDAP, use the information in this section to manage it.

- Disable LDAP in deployments that use Helm
- Disable LDAP in deployments that use Kubernetes descriptors

Procedure: Disable LDAP in deployments that use Helm

**Purpose:** Disable LDAP when GCXI is deployed using Helm.

Prerequisites

This procedure assumes that the default namespace is **gcxi**. (If yours is not, then you must add **-n gcxi** to all kubectl commands.)

### Steps

1. Execute the following commands to stop GCXI:

```
helm upgrade <release_name> <path_to_chart> -n gcxi --reuse-values --set gcxi.replicas.worker=0
where:
<release_name> — GCXI Helm release name.
<path_to_chart> — the path to the Helm chart files.
For example:
```

```
helm upgrade gcxi-helm gcxi/ -n gcxi --reuse-values --set gcxi.replicas.worker=0
```

2. Execute the following commands to start the GCXI pods without LDAP enabled:

```
helm upgrade <release_name> <path_to_chart> -n gcxi --reuse-values --set gcxi.replicas.worker=2 --set-file gcxi.envext= where:
    <release_name> — GCXI Helm release name.
    <path_to_chart> — the path to the Helm chart files.
    For example:
helm upgrade gcxi-helm gcxi/ -n gcxi --reuse-values --set gcxi.replicas.worker=2 --set-file gcxi.envext=
```

Procedure: Disable LDAP in deployments that use Kubernetes descriptors

Purpose: Disable LDAP when GCXI is deployed using Kubernetes descriptors.

Prerequisites

This procedure assumes that the default namespace is **genesys**. (If yours is not, then you must add **-n genesys** to all kubectl commands.)

Steps

1. Edit the **gcxi.properties** file, and remove the following variables:

```
MSTR_WEB_LDAP_ON=true
MSTR_WEB_DEFAULT_LOGIN_MODE=16
```

2. Execute the following commands to recreate the gcxi-config configmap:

```
kubectl delete cm gcxi-config
kubectl create cm gcxi-config --from-env-file k8s/gcxi.properties
```

3. Execute the following commands to recreate the gcxi pods:

```
kubectl delete -f k8s/gcxi.yaml
kubectl create -f k8s/gcxi.yaml
```

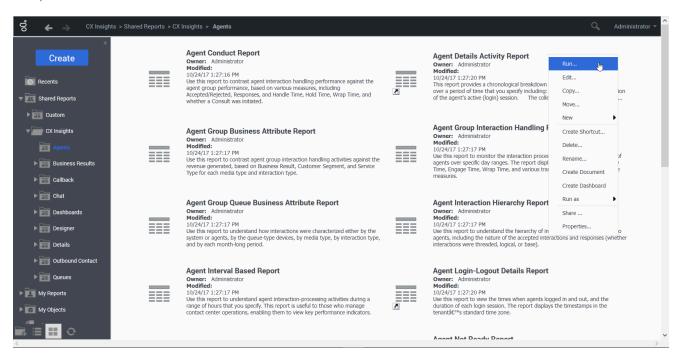
# Understanding and using reports

This page helps you understand Genesys Customer Experience Insights (Genesys CX Insights) reports and dashboards. The Genesys CX Insights reports and dashboards for Genesys Info Mart compile historical contact center interaction activity and agent-summarized states for telephony and multimedia DNs.

### **Important**

In keeping with Genesys' commitment to diversity, equality, and inclusivity, beginning with release 9.0.019.01, some pod names are changed; this document refers to "gcxi-primary" and "gcxi-secondary" pods. In release 9.0.019.00 and earlier, these pods were named "gcxi-master" and "gcxi-slave".

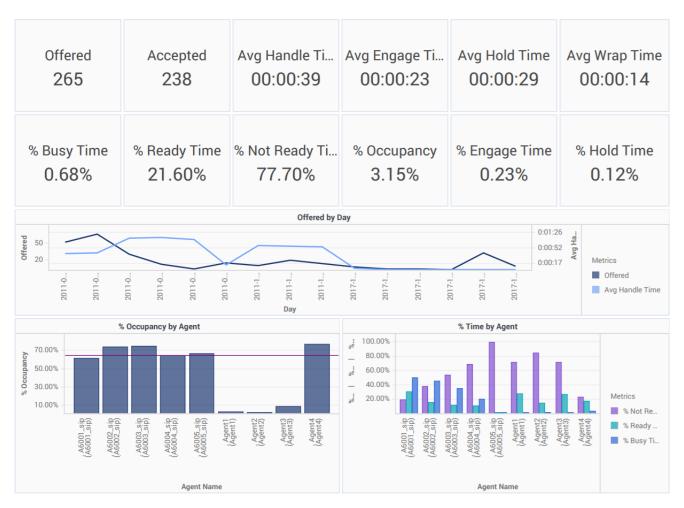
## Reports



Genesys CX Insights includes several dozen reports out-of-the-box, which are available in subfolders within the **CX Insights** folder. The data in the reports represents a snapshot of the database at a given point in time; to view current data, you must run the report to display the latest data. The reports use the hierarchies, metrics, attributes, prompts, details, and filters that are defined in the CX Insights Project.

Reports are designed using MicroStrategy Web. The figure shown here illustrates the organization of some of the reports in the Agents folder and some of the operations that you can perform within MicroStrategy Web. For more information about customizing the reports, see Customizing reports and dashboards

### Dashboards



Genesys CX Insights includes several dashboards out-of-the-box. While some dashboards are available in the **CX Insights** > **Dashboards** folder, many are found in other folders, where they are grouped with reports based on the type of content they provide -- see the latest list of **Dashboards** for more information.

The Genesys CX Insights dashboards provide visual summaries of information that would otherwise be displayed across several reports. The data in the dashboards represents a snapshot of the database at a given point in time; to view current data, you must run refresh the dashboard to display the latest data. For optimal viewing of the dashboards, set your screen resolution to a the highest resolution that is practical, and in any case, to a width of at least 1280 pixels.

Dashboards are designed using MicroStrategy Web. For more information about customizing the

dashboards, see Customizing reports and dashboards

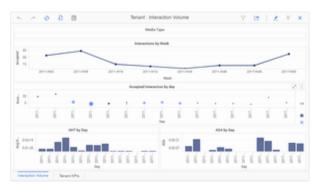
## CX Insights interfaces

Your interaction with CX Insights will usually take place in one of two GUIs:

• MicroStrategy Web — When you view, run on-demand, or modify a report or dashboard, you do so using MicroStrategy Web, the primary Genesys CX Insights GUI, which you access using the URL (<yourserver>/MicroStrategy/servlet/mstrWeb) provided by your administrator. Administrators can configure permissions that determine which operations each user can perform in MicroStrategy Web. MicroStrategy Web is discussed on this page.

MicroStrategy certifies the latest versions, at the time of release, for the following web browsers:

- · Apple Safari
- · Google Chrome (Windows and iOS)
- Microsoft Edge
- Microsoft Internet Explorer (Versions 9 and 10 are supported, but are not certified)
- Mozilla Firefox
- **MicroStrategy Developer** Reserved for administrator use, MicroStrategy Developer is a standalone application you access on the computer where MicroStrategy software is deployed. Use Developer to create and manage projects, objects and users, and to perform other administrative actions. MicroStrategy Developer is discussed in more detail on the **Understanding the Project** page.



The Contact Center Dashboard on a mobile device

### Mobile support

You can also access Genesys CX Insights dashboards from your Apple iPad. Genesys supports accessing the dashboards in this fashion, but does not recommend using reports from a mobile device, as they are not designed for small screens. See the Genesys CX Insights Deployment Guide for more information, and the MicroStrategy website.

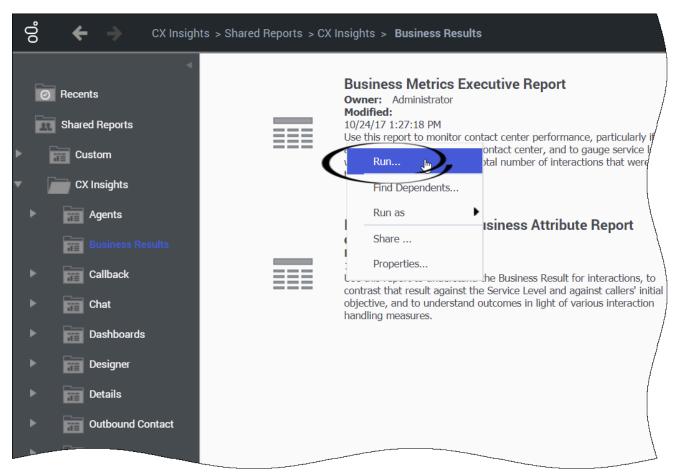
Genesys documentation, including this document, also supports mobile devices. In most cases, it easier to use Genesys CX Insights, and the documentation, in landscape mode.

## Video: Generate reports in Genesys CX Insights

### Link to video

This video describes how to generate reports in Genesys CX Insights.

## Accessing and running reports and dashboards



- 1. Go to the Genesys CX Insights (MicroStrategy Web) link provided by your administrator.
- 2. If a page appears where you can select a server, choose the server on which to view reports (you probably have only one, but if more than one appears, and you are not sure which one to select, contact your administrator).
- 3. If prompted, enter your user name and password.
- 4. The Genesys CX Insights page appears. Click **Shared Reports** > **CX Insights**. In most cases, the reports you need are found in the **Shared Reports** folder:

- **Shared Reports**—Reports and dashboards stored in the **Shared Reports** are available to other users (access privileges permitting).
- **My Reports**—Reports stored in your private folders, such as **My Reports**, are visible only to you. This folder is visible only to users who have sufficient privileges to edit or save reports.
- Reports are divided into subfolders based on function; select a sub-folder, for example Business Results.
- 6. From the listed reports, either double-click a report, or right-click and choose **Run**. For example, **Business Metrics Executive Report**. The prompts for that report appear.
- 7. Select a date or date range, and optionally make selections for other prompts.

  To generate meaningful reports, choose dates for which your environment has data. Note that, if you are working in a demo/development environment, data is available for a limited period:
  - For Genesys CX Insights reports, data is available for the period September 2015 to October 2016.
  - For Genesys CX Insights for iWD reports, data is available for the period February 12, 2019 to February 21, 2019.

When you run reports in such environments, choose dates within that range, or simply remove the default value from the first prompt (Pre-set Date/Day) before you run the report.

#### [+] More about prompts

Many reports offer a long list of prompts, but you don't have to make selections at all those prompts. For most reports, you can simply select a date or date range, and click **Run Report** to generate the report. Before you do, note that the default **Start Date** and **End Date** encompass the entire current year; depending on your environment, this may not be a suitable range. For more information about prompts, see **How do I control what data appears in a report?** 

8. Click Run Report.

The report appears. You can filter, drill, and otherwise interact with many report values.

As you browse in Genesys CX Insights, clickable breadcrumbs are displayed at the top and bottom of the page:

Shared Reports > CX Insights > Business Results

Click any word in the breadcrumb to return to that folder.

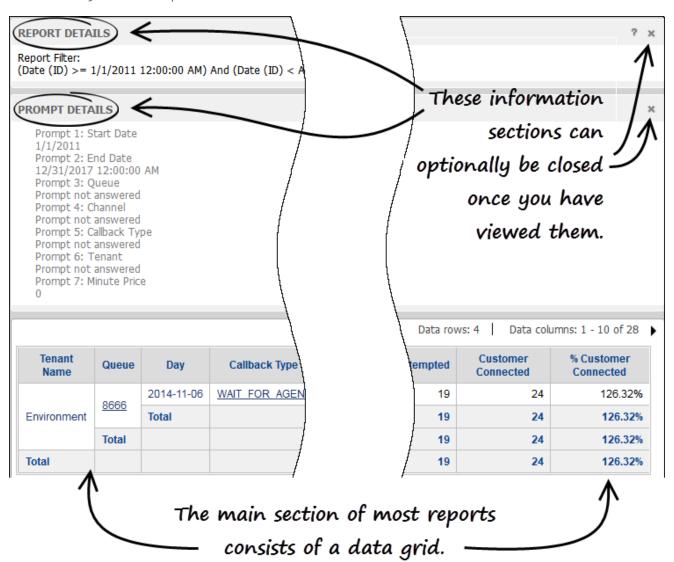
Help finding reports



You can use the search feature to easily find all reports with a given word or phrase in the report name:

- 1. Select the top level **CX Insights** folder (to search the entire folder).
- 2. At the top of the page, click the magnifying glass to open the search window.
- 3. Select a folder (for example **Shared Reports**) in which to search, enter a search term (for example **Callback**), and press **Enter** (or click the magnifying glass).
- 4. For more powerful search options, click **Refine**. Advanced search options appear, which you can use to refine your search based on various criteria, such as object type, owner, date, or description.

## Anatomy of a report

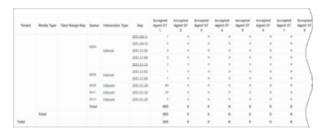


Each report is divided into several sections (except for the main section of the report, each section is called an 'editor'):

- **Report Details Editor** provides information about the data in the report. You can optionally close this editor by clicking **x**.
- **Prompt Details Editor** provides information about the prompt values used to run the report. You can optionally close this editor by clicking **x**.
- The report grid In most cases, reports consist of a simple grid, illustrating the selected data. Some prompt and metric names shown in reports are self-explanatory, but some may require explanation; see the individual report descriptions (see the list of reports) for more information about specific prompts and metrics.
- Other editors appear if you open them, such as the View Filter Editor.

### What zero signifies in a report

Whenever the underlying query for a Genesys CX Insights report returns no rows, the report displays no data. For example, a query to retrieve activity for a particular agent for a shift that the agent did not work returns no data.



Zero Values in the Speed of Accept Report

For those Genesys CX Insights reports that do return rows, but in which a particular field is not applicable, the reports return a value of 0.

For example, this occurs when all interactions for a particular day are accepted within the first four service time intervals that are defined for a tenant, but none are accepted beyond the fourth interval. As a result, the Speed of Accept (seconds) Report—a portion of which is shown in the figure Zero Values in the Speed of Accept Report—displays 0 values for the each of the fifth through tenth intervals.

The reports also return 0 for measures when the underlying database columns on which measures are based hold 0 values. Additionally, when a report is based on a query that gathers data from more than one aggregation table, empty cells in reports are possible where other cells contain data.

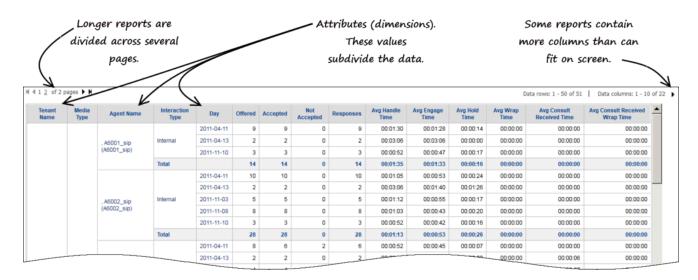
For composite measures, such as percentages and averages, wherever a 0 count or 0 duration ensues, the reports display 0 for such measures. The average duration of calls placed on hold, for instance, is 0 in the circumstances where either no calls were placed on hold during the interval, or where the duration of held calls was 0 seconds (or a fraction of 1 second).

The custom reports that you create might behave differently depending on their design.

## The report grid

The main area of a typical report consists of a simple grid, optimized for on-screen viewing, but also easily printed to PDF, XLS or other formats. (For reports with a lot of columns or rows, you may find it easiest to view your reports as PDFs.)

The first few columns of each report represent Attributes (also known as Dimensions). These are values that divide up the data, and their impact is cumulative, from left-to-right. For example, in the Agent Utilization Report (shown here), the first column divides the data by Tenant Name, the second column subdivides the tenant data by Media Type, the third column subdivides the tenant/media data by Agent Name, the fourth column subdivides the individual agent data by Interaction Type, and the fifth further breaks that down by Day.



Depending on your access role and the report you are viewing, you can manipulate a report in several ways:

- Sort—Right-click in a column, and choose an option from the **Sort** menu, to sort the table by the order
  of that column. Or, choose **Sort Grid** to sort the table by more than one column. Not all columns can
  be sorted.
- Drill—Right-click in a column, and choose an option from the **Drill** menu, to drill up or down on the data in that column. For example, to change from viewing data for the Month, to viewing it for the Day, Hour, or even the Year. See Drilling in report data. Not all columns can be drilled.
- Filter—Right-click in a column, and choose an option from the **Filter on** menu, to open the View Filter Editor, where you can select one or more conditions. See Filtering report data.

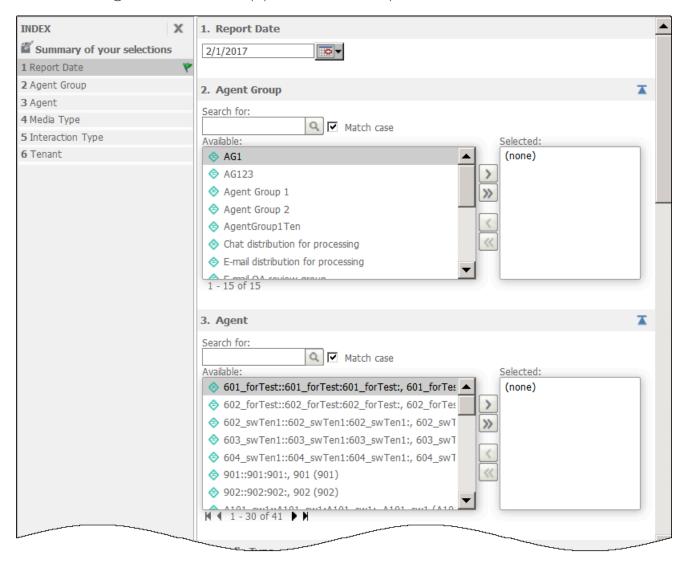
Agent-based reports do not contain data that summarizes virtual interactions, virtual agent activity, and Interactive Voice Response (IVR) port activity. However, if IVRs are configured as handling resources in your environment, data that pertains to IVR ports is included in the business attribute and interaction detail reports.

## Video: Drill or filter in reports

### Link to video

This video describes how to read, drill, and filter historical reports in Genesys CX Insights.

## Controlling what data appears in a report



In many cases, you may want to restrict what data is gathered into a report; for example:

• if your environment contains a large amount of data, some reports can become very long.

• if you want to see a report about just one aspect of the contact center, such as single agent group.

When you open any report, the report prompts appear, where you can customize the data that is taken into the report. The prompts available are specific to each report—the example shown here pertains to the Agent Conduct Report:

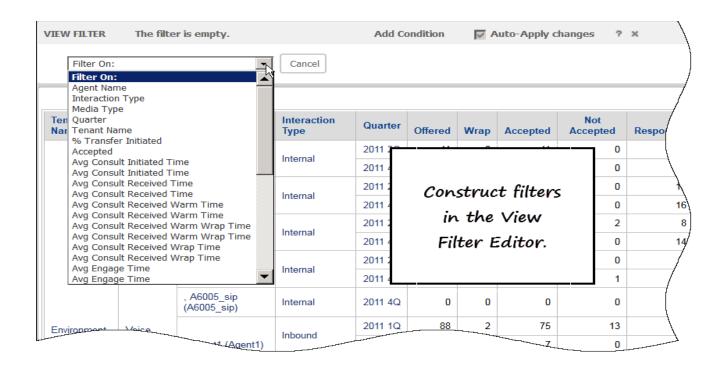
- For each prompt, enter or select appropriate values. Each prompt provides either a drop-down list or a search field and accompanying button.
- Use the Index, to the left of the prompts input area, to quickly jump to any section of the prompts.

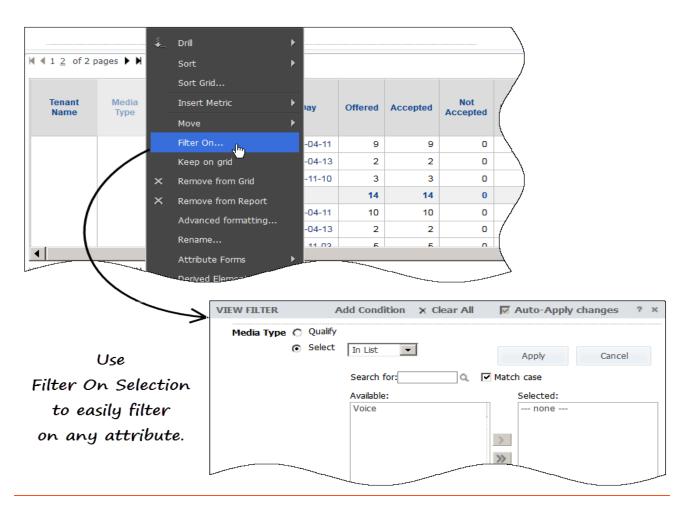
In many cases, the default values are appropriate; if in doubt about a given prompt's effect, see the descriptions given below, or try running the report with default values to get a better idea of the result. Each report has a unique set of prompts from which you can select values for the attributes used in the report. For example, in the **Agents / Agent Conduct Report**, you can make the following prompt selections:

### [+] Show: Prompts in the Agent Conduct Report

Prompt	Description
Report Date	Select the day for which to generate a report. (This report describes activity for a single day).
Agent Group	Optionally, restrict the report to show information about specific groups.
Agent Name	Optionally, restrict the report to show information about specific agents.
Media Type	Optionally, restrict the report to show information only for specific Media Types.
Interaction Type	Optionally, restrict the report to show information only for specific Interaction Types.
Tenant Name	In multi-tenant environments, you can optionally restrict the report to show information only for the selected tenant.

Filtering report data





After running a report, you can further filter the data that appears in the report. These filtering options are powerful, and let you make more selections than those you made on the prompts page when you ran the report. You can add more than one filter on a report.

Use either of the following to methods to filter a report:

### Creating a filter using the View Filter Editor

Open the View Filter Editor to manually construct a filter.

- 1. Open and run a report. For example, **Agents > Agent Utilization Report**.
- 2. Click **Tools** > **View Filter**. The View Filter Editor appears.
- 3. Click **Add Condition**. The **Filter On** drop down list appears.
- Click Filter On, and select a value on which to filter. For example, Agent Name will allow you to show only specified agent in the report.
   A list of Available agent data appears.
- Double-click the name of each Agent to include (you can include one, several, or even all), and click Apply.

You can add more than one filter on a report.

### Filtering on selections

Use **Filter On** to build a filter more guickly.

- 1. Open and run a report. For example, Agents > Agent Utilization Report.
- 2. Right-click a value that you'd like to filter on (a value in one of the attribute columns, such as an agent name)
- 3. Click Filter on Selections.

The View Filter Editor appears, where you can modify the filter as needed.

Drilling in report data

Agent Name	Interaction Type	Day	Offered	Accepted	Not Accepted	Responses	Avg Handle Time	Avg Engage Time	Avg Hold Time	V 1
		2011-04-11	9	9	0	9	00:01:30	00:01:28	00:00:14	91
, A6001_sip	Internal	2011-04-13	2	2	0	2	00:03:06	00:03:06	00:00:00	
(A6001_sip)		2011-11-10	3	3	0	3	00:00:52	00:00:47	00:00:17	_[
	Total		14	14	0	14	00:01:35	00:01:33	00:00:16	
	/	2011-04-11	10	10	0	10	00:01:05	00:00:53	00:00:24	g
		2011-04-13	2	2	0	2	00:03:06	00:01:40	00:01:26	00
, A6002_sip	Internal	2011-11-03	5	5	0	5	00:01:12	00:00:55	00:00:17	00
(A6002_sip)		2011-11-08	8	8	0	8	00:01:03	00:00:43	00:00:20	0)
		2011-11-10	3	3	0	3	00:00:52	00:00:42	00:00:16	
	Total		28	28	0	28	00:01:13	00:00:53	00:00:26	
	\	2011-04-11	8	6	2	6	00:00:52	00:00:45	00:00:07	
	1	2011-04-13	2	2			<del></del> 0:00:10	00:00:04	00:00:00	$\Delta$
Agent Name	Interaction Type	4	) Prill		Not	Rasnonsas	Avg Handle ime	Avg Engage Time	Avg Hold Time	!
		201	Sort		→ <u>a</u> p	lour 🛵	:01:30	00:01:28	00:00:14	9
A6001_sip	Internal	201	Sort Grid			lore options	:03:06	00:03:06	00:00:00	7
A6001_sip)		201	nsert Metri	r	<b>,</b>	-	:00:52	00:00:47	00:00:17	1
	Total			_	0	14	00:01:38	00:01:33	00:00:16	
		201	love		0	10	00:07:05	00:00:53	00:00:24	d
		201 F	ilter On		0	2	00:03:06	00:01:40	00:01:26	0
A6002_sip	Internal	201	Keep on gri	d	0	5/	00:01:12	00:00:55	00:00:17	0
(A6002_sip)		201 × F	Remove fro	m Grid	0	8	00:01:03	00:00:43	00:00:20	0
		201 × F	Remove fro	m Report	0	3	00:00:52	00:00:42	00:00:16	1
	Total		Advanced fo	ormatting	<b>6</b>	28	00:01:13	00:00:53	00:00:26	/
		201	Rename		2	6	00:00:52	00:00:45	00:00:07	
		201	Attribute Fr	nrme				00:00:04	00:00:00	
Agent Name	Interaction Type	Hour	Offered	Accepted	Not Accepted	Responses	Avg Handle Time	Avg Engage Time	Avg Hold Time	A W Ti
	-	2011-04-11 12	3	3	0	3	00:03:14	00:03:09	00:00:14	00/
46001 sin	Internal	2011-04-11 13	6	6	0	6	00:00:38	00:00:38	00:00:00	
, A6001_sip (A6001_sip)	-	2011-04-13	2	2	0	2	00:03:06	00:03:06	00:00:00	9
		2011-11-10	3	3	0	3	00:00:52	00:00:47	00:00:17	00:0
	Total	2044 24 11	14	14	0	14	00:01:35	00:01:33	00:00:16	00:0
		2011-04-11	4	4	0	4	00:02:03	00:01:33	00:00:29	00/
		2011-04-11	6	6	0	6	00:00:27	00:00:26	00:00:04	
		2011-04-13	2	2			-00:03:06	00:01:40	00:01:26	0/7

You can drill on report data to see more detailed (or more general) information.

- 1. To drill on a report, first open and run the report.
- 2. Right-click a heading in the report; a context menu opens. If it is possible to drill on the metric on which you have clicked, **Drill** appears in the menu. The choices available vary depending on the type of data on which you click ('Drill down to Agent Name', 'Drill up to Month', 'Drill down to Interaction subtype', and so on). Not all data can be drilled. For example, right clicking the heading **Day** (in reports where that heading appears, such as **Agents** > **Agent Utilization Report**) gives you the option to drill to another time period, such as Month or Year. Arrows in the menu indicate whether a drill option is drilling 'Up' or drilling 'Down'.
- 3. Select one of the drill actions that appear. The report automatically updates to account for the change. Open the Drill menu again; the available options have now changed.

For more comprehensive drill options, click the **Data** menu, and select **Drill**. The **Drill Editor** appears, where you can drill on multiple columns, and access advanced options.

### **Drill considerations**

The ability to drill up or drill down within a report allows you to view results from a wider or narrower perspective, but it's important to understand the logic that Genesys CX Insights applies when you drill, as there are some cases where data can seem to disappear after you drill, or you see data that is not what you might expect.

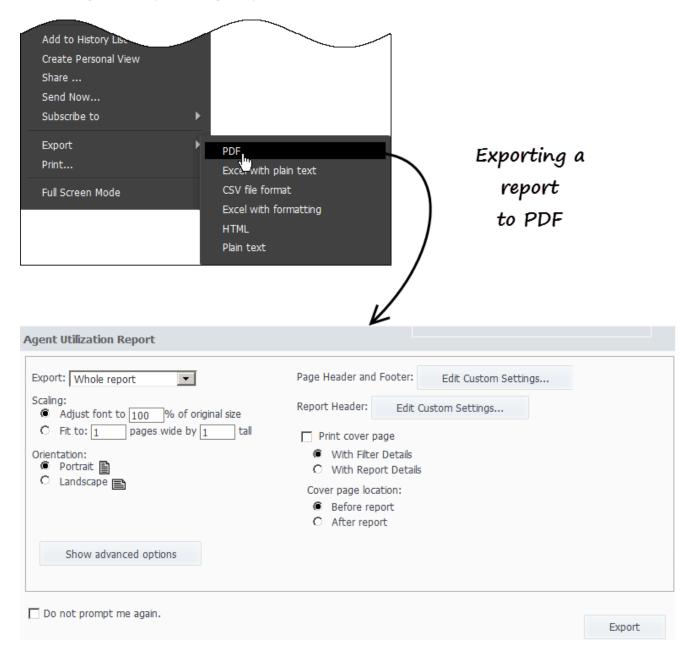
Drilling occurs along the attribute hierarchies, for example, **up** from Agent to Agent Group, or **down** from Agent Group to Agent:

- Agent hierarchy: Agent Group ←→ Agent Name
- Campaign Group hierarchy: Campaign Group ←→ Campaign
- Interaction hierarchy: Interaction Type ←→ Interaction Subtype
- Service Type hierarchy: Service Type ←→ Service Subtype
- Time Interval hierarchy: Year ←→ Quarter ←→ Month ←→ Day ←→ Hour ←→ 30 minutes
- Queue hierarchy: **Queue Group** ←→ **Queue**

Unexpected results can occur in various situations, such as:

- When you run a report with date prompts for a specific sequence of days, and then drill up to a longer period of time, the report shows data for the entirety of of the new period; however, this works only if the specific sequence of days includes the starting DATE\_TIME\_KEY for the time period to which you drill. Otherwise, the report can return no data. For example, if you initially run a report over a the 1st 5th of the month, and then drill up to the month level, the report takes in data from the rest of the month. However, if you run it over another five day period -- say the 5th 10th, and then drill up, the report returns no data.
- When agent-campaign results are displayed, drilling down from campaign to campaign group and then drilling up from agent to agent group can result in duplicate rows.
- Drilling down from aggregated results to the interaction- or interaction-segment level is not supported. (This is different from drilling along the Interaction hierarchy, which is based on interaction type and subtype (for example, Inbound/InboundNew), not on the legs of the interaction.)

# Printing or exporting report data



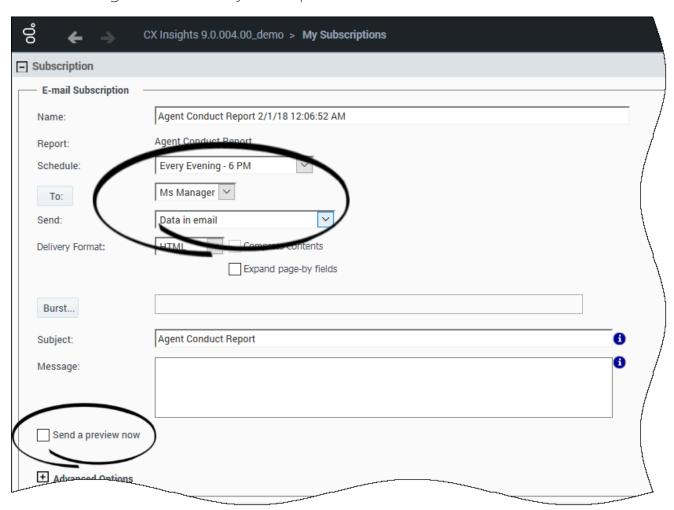
You can easily export your reports to a variety of formats, including PDF (useful for printing) or Excel/CSV (useful if you want to take the data into other applications or manually edit the output).

Click Report Home > Export > PDF.
 The PDF options page appears in a new browser tab.

- Optionally, select options to control how the report will be exported, such as page size, orientation, or other aspects of formatting. For many reports, it is a good idea to select **Fit to 1 Pages Wide** and **Landscape**.
- 3. Click **Export**. The PDF opens automatically in the browser tab. If you are happy with the output, you can click **Download** (to save the file) or **Print**.

Some users find it useful to export data to a spreadsheet format, as it is then possible to more easily sort and view the data, particularly if there is a lot of data in your report, due to the larger screen area available in a spreadsheet application, such as Microsoft Excel. This is particularly true if you have a great deal of data in your report, or in the case of reports that just can't easily fit in a browser window because they contain many columns or rows.

# Scheduling the delivery of reports



You can run a report regularly--every day, or every week, for example. Genesys CX Insights enables you to create Subscriptions, which schedule the delivery of one or more reports into your Genesys CX

Insights History List, or send them to you automatically by email or SFTP.

### **Important**

You must be an administrator (or a member of the group "CX Insights report developers" or "CX Insights report editors") to configure an email address. Otherwise, contact your administrator to complete steps 2 and 3 for you (steps are provided by MicroStrategy, in the article KB30581).

### Schedule email delivery

To schedule the delivery of a report by email, first define an email address, and then subscribe to the report using that address:

- 1. Log in to CX Insights.
- 2. Click your user name, select **Preferences**, and click **E-mail Addresses**.
- In the Email Addresses list, click Add a New Address. Enter the Address Name (a short name to identify the account), the Physical Address (the email address), and choose the Device. This is the email type, such as Outlook.
- 4. Click Save.
- 5. In the breadcrumbs, click **CX Insights** to return to the Home page.
- 6. Open the **Shared Reports** folder, and navigate to the report you want to schedule.
- 7. Hover over the report name/description, and several options appear below the description. Click **Subscriptions**.
- 8. On the **My Subscriptions** page, scroll down and click **Add email subscription**. The **E-mail Subscription** options appear, as shown in the adjoining figure.
- 9. Choose an option from the **Schedule**, and **To** lists. You can add more than one recipient in the **To** list.
- 10. Optionally, test the subscription by selecting **Send a preview now** (if you do, an email typically arrives within a few minutes). Click **OK**.

### Tip

In some scenarios, email messages that notify users of scheduled reports can contain unexpected characters in the email subject line. If you encounter this issue, see the Known Issue GCXI-2327

If you create a subscription for a user who is, or later becomes, disabled, MicroStrategy does not send the report to that user, though it continues to send it to other subscribers.

In release 9.0.010 or later, if you have created subscriptions for a user, use the following steps to transfer those subscriptions to another user (without having to recreate them from scratch):

- 1. Open MicroStrategy Products > Command Manager. A log-in dialog appears.
- 2. Log in as user who is a member of both the **General Developers** group and the **General Users Administrators** group.
- 3. Enter the following command into a script:

```
ALTER EMAILSUBSCRIPTION "<subscription_name>" OWNER "<user_name>" IN PROJECT ""project_name>";
For example:

ALTER EMAILSUBSCRIPTION "Agent Conduct Report 3/21/19 2:30:15 PM" OWNER "Administrator" IN PROJECT "CX Insights";
```

4. On the menu, click **Connection** > **Execute**.

For information about user groups (including **General Developers** group and the **General Users Administrator**) see the *Genesys CX Insights Deployment Guide*. If you have difficulty, contact Genesys Customer Care for assistance.

### Schedule FTP delivery

Beginning with release 100.0.021.00, Genesys CX Insights supports scheduled delivery of the standard reports using FTP / SFTP.

# Important

This feature is not intended to be used as a data dump tool to reliably extract large volumes of data. This is because report export can fail, or can occur not-on-schedule, due to maintenance activities, or simply due to a large volume of data. If you need to reliably transport Genesys Info mart data, use the Genesys Info Mart Data Export feature (also known as BI Data Feed), which is described Genesys Info Mart Physical Data Model documentation for your RDBMS (Microsoft SQL Server, PostgreSQL, Oracle).

1. Configure FTP delivery by setting FTPDEF\* variables in gcxi.properties, for example:

```
FTPDEF1=DeviceName=myFTP1;Protocol=2;ServerName=ftp_server_name_1;Port=22;RemoteDir=/subs/
files/
location;UserName=user_name_with_access;FTPServerPassword=password;CreateFolders=true;AppendUserPath=t
FTPDEF2=DeviceName=myFTP2;Protocol=2;ServerName=ftp_server_name_2;Port=22;RemoteDir=/GCXi/
files/
```

location;UserName=user name with access;FTPServerPassword=;CreateFolders=true;AppendUserPath=true;Over

2. In MicroStrategy Developer:

- 1. From the Developer **Folder List**, expand **Administration**, expand **Delivery Managers**, and select **Devices**.
- 2. Right-click in the **Device List** area, select **New**, and then **Device**.
- 3. Select FTP and click OK.

- 4. Select **SFTP** as the protocol type, and enter the information required to connect to your SFTP server.
- 5. Click OK.
- 6. If you are previously authenticated into Genesys CX Insights, you must refresh your login session to make the device available.
- 3. In Genesys CX Insights:
  - 1. Open the **Shared Reports** folder, and navigate to the report you want to schedule.
  - 2. Hover over the report name/description, and several options appear below the description. Click **Subscriptions**.
  - On the My Subscriptions page, scroll down and click Add FTP subscription. The FTP Subscription options appear.
  - 4. Enter appropriate values for **Schedule**, **Location**, **Delivery Format**, and other values as required.
  - Click OK.
- 4. Optionally, you can provide FTP credentials using the file **gcxi-secrets.yaml**. For example:

```
FTPDEF1_FTPServerPassword: <password1>
FTPDEF2_FTPServerPassword: <passwords>
FTPDEF1_UserName: <username>
where <password1>, <passwords>, and <username> are appropriate values. Note that two underscores are required after the prefix (FTPDEF*_).
```

For example:

```
FTPDEF1__FTPServerPassword: R2VuZXN5c18w
FTPDEF2__FTPServerPassword: R2VuZXN5czE=
FTPDEF1__UserName: Z2N4aQ==
```

# Enabling Languages on the server

Several languages are supported by Genesys CX Insights, and the files to support them are included in the IP. However, before users can select a language, an administrator must enable it on the server.

Use the following steps to enable a language on the server.

1. Execute the following command to back up the GCXI meta db:

```
kubectl apply -f k8s/gcxi-backup.yaml
```

2. Execute the following command to stop currently running containers:

```
kubectl scale deploy/gcxi-secondary --replicas=0
kubectl scale deploy/gcxi-primary --replicas=0
```

3. Edit the **gcxi.properties** file, and add the LANGS variable:

```
LANGS=<lang_code_1>,<lang_code_2>,..<lang_code_N>
```

where each <lang\_code> is a value from the table in Supported languages. The first value added (<lang\_code\_1>) becomes the default language. For example, to make Chinese (simplified) the default language, and enable both German (Germany) and Japanese:

LANGS=zh-CN,de-DE,ja-JP

#### Note the following:

- If no value is set for the LANGS variable, en-US is used.
- The default language is controlled by the the first value added to the LANGS variable, and can be any language other than en-US. If you wish to use en-US as the default, make any other language the default, and then change the language using the steps in Changing the language used in the reports.
- When upgrading to a later GCXI release in scenarios where you have set a default value other then en-US, you must set a value for the LANGS variable in **gcxi-properties**, or GCXI will revert to en-US for the default language. However, user preferences (as set in Changing the language used in the reports) are preserved after an upgrade.
- The format of the <lang\_code> variables changed beginning in release 9.0.010.
- 4. Execute the following command to load gcxi.properties into Kubernetes:

```
kubectl delete configmap gcxi-config
kubectl create configmap gcxi-config --from-env-file=k8s/gcxi.properties --namespace
genesys
```

5. Execute the following commands to start the PRIMARY container:

```
kubectl scale deploy/gcxi-primary --replicas=1
```

Wait until PRIMARY is done (wait until Tomcat is up, and MicroStrategyWeb page is available).

6. Execute the following command to start the SECONDARY container:

```
kubectl scale deploy/gcxi-secondary --replicas=1
```

Users can now change the language. (See Changing the language used in the reports.)

#### Note the following:

- When you enable a language on the server, the reports and GUI are automatically switched to that language.
- When non-administrative users change language preferences, they will see a list of language choices that includes languages you have not enabled; to avoid confusion, if users will need to switch languages, you should notify them about what language you have enabled for them to use.
- As an administrator, you can optionally change language default settings for all users; log in as an administrator, and click **Preferences** -> **Project Defaults** -> **General**.

### Supported languages

Genesys CX Insights provides support to translate (localize) the GUI and Genesys CX Insights reports.

See the appropriate table to match your deployment:

- Language support for the Genesys CX Insights project
- Language support for the Genesys CX Insights for iWD project

#### Language support for the Genesys CX Insights project

Language	LANGS variable value
Arabic (release 9.0.010.04 and later)	ar-SA
Chinese (simplified)	zh-CN
Dutch (release 9.0.014 and later)	nl-NL
French (Canada)	fr-CA
French (France)	fr-FR
German (Germany)	de-DE
Italian	it-IT
Japanese	ja-JP
Korean (release 9.0.010.04 and later)	ko-KR
Polish (release 9.0.014 and later)	pI-PL
Portuguese (Brazil)	pt-BR
Russian	ru-RU
Spanish (Latin America)	es-419
Turkish	tr-TR

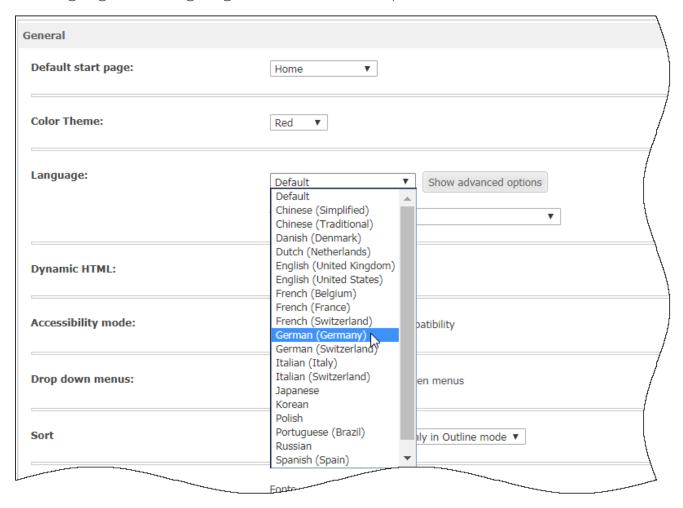
Support for localization of the Genesys CX Insights for iWD is available in release 9.0.014 and later.

# Language support for the Genesys CX Insights for iWD project

Language	LANGS variable value
Chinese (People's Republic of China)	zh-CN
German (Germany)	de-DE
French (Canada)	fr-CA
French (France)	fr-FR
Japanese (Japan)	ja-JP
Portuguese (Brazil)	pt-BR
Russian (Russia)	ru-RU
Spanish (Mexico)	es-MX

In release 9.0.013 and earlier, you cannot change the language used in  $Gensys\ CX\ Insights\ for\ iWD\ reports.$ 

# Changing the language used in the reports



Before you can select a language, an administrator must enable it on the server. Only one language, in addition to US English, is enabled at any time. Talk to your administrator to find out what language is available for your use (or see <a href="Enabling Languages">Enabling Languages</a> on the server). Changes described in this procedure apply only to your own sessions, not to other users.

Use the following steps to change the language used in the GUI and reports.

- 1. Log in to Genesys CX Insights.
- 2. Click the drop-down menu next to your user name, and select **Preferences**.
- 3. On the **User Preferences** > **General** page:
  - 1. Change the language used in the GUI: In the Language section, select a language from the list.
  - Change the language used in the reports: Click Show advanced options, from the Metadata list, select a language.
- 4. Scroll to the bottom of the page, and click **Apply**.

5. Use the browser's back arrow, or click in the breadcrumbs, to continue.

# **Important**

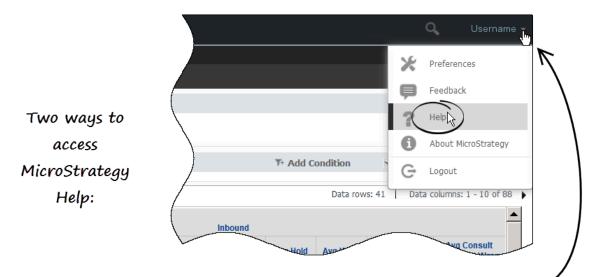
Not all languages listed in the GUI are enabled for your use. Check with your administrator.

# Video: Change the language used in reports

#### Link to video

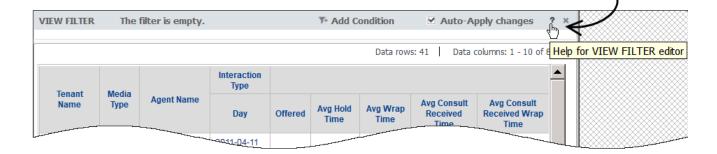
This video describes how to change the language used in reports in Genesys CX Insights.

## Where can I learn more?



Select Help from the menu to access MicroStrategy user guides.

Click? to access context-sensitive help.



In addition to the Genesys CX Insights documentation, extensive MicroStrategy Product Documentation is available. (MicroStrategy is the engine that drives Genesys CX Insights.) See links to specific MicroStrategy wiki pages on the Additional Resources page in this document.

- For context-sensitive help to explain the options you see on the Genesys CX Insights GUI, click the ? next to the editor for which you want more information.
- For advanced users seeking detailed information, click the menu next to your user name, and click **Help** to access the latest online MicroStrategy user guides and manuals.

# Understanding the project

Report users interact with Genesys Customer Experience Insights (Genesys CX Insights) exclusively through MicroStrategy Web, which enables users to connect seamlessly to the CX Insights Project to run queries against their data mart. Report users can view reports and, if assigned the necessary access rights, create or modify reports, choosing objects from the CX Insights project. All of this is possible without ever seeing or having to understand the complex queries or data structures of the underlying data mart.

## **Important**

In keeping with Genesys' committment to diversity, equality, and inclusivity, beginning with release 9.0.019.01, some pod names are changed; this document refers to "gcxi-primary" and "gcxi-secondary" pods. In release 9.0.019.00 and earlier, these pods were named "gcxi-master" and "gcxi-secondary".

# **Important**

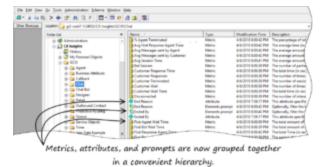
This page describes the standard CX Insights project. Beginning with release 9.0.010, a second project, **CX Insights for iWD** is included for iWD customers. It has structure and features similar to the CX Insights project described on this page. See About the CX Insights for iWD project below, and additional information on the CX Insights for iWD reports page.

This page discusses the underlying project that operates behind the scenes to support the reports, and briefly discusses MicroStrategy Developer, the interface that is used to create and manage objects. For detailed instructions about how to use MicroStrategy Developer, see the MicroStrategy product documentation.

# Tip

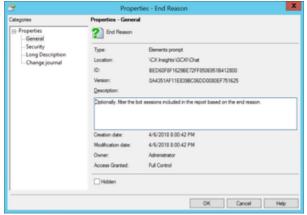
If you are familiar with Genesys Interactive Insights (GI2), which is replaced by Genesys CX Insights, think of the CX Insights project as conceptually similar to the GI2 Universe.

# About the CX Insights project

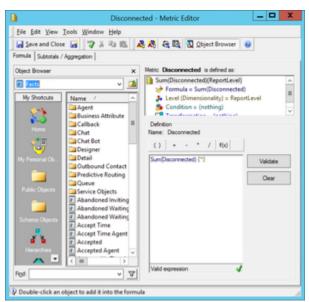


Objects in any subfolder are compatible with each other.

The project hierarchy in MicroStrategy Developer



The Properties dialog



The Metric Editor

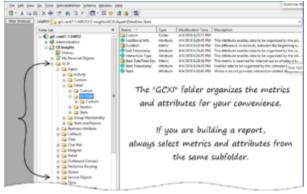
Genesys CX Insights is built on the MicroStrategy BI platform, which uses the concept of a *project* — an environment containing the elements that are necessary for historical reporting. The Genesys CX Insights Project defines what database tables are used in your environment, stores the schema and reporting objects in a hierarchical fashion, and defines the security scheme that controls access to the objects. Among the objects stored in this hierarchy are application objects, such as filters, prompts, metrics, and reports, as well as schema objects such as attributes and facts. The content within the Genesys CX Insights Project is defined by the MicroStrategy metadata repository, an object-oriented model that stores information in a relational database, and defines the various objects:

- Schema objects Objects created in the application, that correspond to database objects, such as tables, views, and columns. Schema objects include facts, hierarchies, and other objects that are stored in the MicroStrategy Developer **Schema Objects** folder.
- Application objects Objects used in data analysis. Application objects include reports, documents, filters, templates, custom groups, metrics, and prompts.
- Configuration objects Objects that provide information about connectivity, user privileges, and project administration. Configuration objects include database instances, users, and groups.

Genesys supports the <u>creation of customized reports</u>, but does not support customization of the underlying metadata.

For detailed information about the objects you can use to customize reports, see the *Genesys CX Insights Projects Reference Guide*, which describes metrics and attributes, and the folders that are used to organize them.

## The project hierarchy



The GCXI folder

- **GCXI** folder open this folder to browse objects, such as prompts, attributes, and metrics, organized in a convenient hierarchy. When you are creating or modifying reports, select metrics and attributes from a given subfolder, to ensure compatibility.
- **Public Objects** folder open this folder to browse reports.

To learn more about any object, right-click the object and select **Properties**. The **Properties** dialog appears, providing information, including a description of the object, as shown in the figure **The Properties dialog**.

To edit a metric, or view the formula, right-click the metric, and select **Edit**. The **Metric Editor** appears, providing detailed information as shown in the figure **The Metric Editor**.

For more information about creating your own custom reports, see Customizing reports.

# Metric naming in the Genesys CX Insights project

Metrics are organized in a hierarchical structure that parallels the reports that the metrics support. In many cases, metrics in different folders/reports share the same name, but the metrics often do not have identical descriptions (see the **Properties** dialog) or definitions (see the **Metric Editor**).

Detail metrics are sourced from the following Genesys Info Mart tables:

- SM\_RES\_STATE\_FACT
- SM\_RES\_STATE\_REASON\_FACT
- MEDIATION SEGMENT FACT
- INTERACTION RESOURCE FACT

All interval metrics are sourced from aggregation tables that contain "\_I\_" in the database object name — for example:

- AG2\_I\_AGENT\_SUBHR
- AG2 I STATE RSN SUBHR
- AG2\_I\_SESS\_STATE\_SUBHR

No special naming convention identifies a table as one that contains disposition metrics, other than disposition metrics are all sourced from AG2\_\* tables that do not to use "\_I\_" in the table name—for instance:

- AG2\_AGENT\_CAMPAIGN\_HOUR
- AG2\_AGENT\_QUEUE\_HOUR
- AG2 CAMPAIGN HOUR
- AG2 QUEUE HOUR
- AG2\_QUEUE\_ABN\_HOUR
- AG2\_QUEUE\_ACC\_AGENT\_HOUR
- AG2\_QUEUE\_GRP\_HOUR
- AG2 ID HOUR
- AG2\_AGENT\_HOUR
- AG2 AGENT GRP HOUR

Each hierarchy contains seven tables and/or views, which have the following suffixes:

• SUBHR

- \_HOUR
- DAY
- WEEK
- MONTH
- QRTR
- YEAR.

# Classification of metrics

All metrics are classified as one of three types:

- Detail
- Interval
- Disposition

Metrics can also be described as measuring either *customer* or *consult* interactions, and for consult interactions, as either *warm* or *simple* consultations. The following subsections describe each of these classifications.

#### **Detail metrics**

Detail metrics provide the measure of one and only one activity, in contrast to interval and disposition metrics, which aggregate information about a number of interactions that occur over a period of time. The following are examples of detail metrics:

- Session\Active Time
- State\Reason Time
- Ixn State\Duration
- Handling Attempt\Queue Time

#### Interval metrics

*Interval metrics* measure the activities occurring within the reporting interval as they occur, regardless of whether the interactions complete during the interval and whether the interval completes.

Counts and durations of such metrics are clipped where interactions cross over multiple intervals and are attributed to each of the intervals in which the activities occur. In scenarios in which an interaction is waiting in queue when the interval changes, the time that the interaction actually waited in queue during the first interval is attributed to the first interval. For example, if an interaction is waiting in queue from 3:58–4:03 PM, two minutes is attributed to the first interval (3:30–3:59 PM), and the remaining three minutes is attributed to the second interval (4:00–4:29 PM).

Furthermore, a count is attributed to each interval in which the interaction persists—that is, a count

of 1 for the interaction that is waiting in queue during the first interval, and another count of 1 for the same interaction, waiting in queue, during the second interval.

Interval metrics provide an interpretation of the activity that occurred during an interval. The following are examples of interval metrics:

- Interaction State\Consult Received Time
- Interaction State\Hold
- Summarized State\Active Time
- Summarized State\Busy
- · Metrics in the Ixn State folder

### Disposition metrics

Disposition metrics provide an interpretation of the count and duration of contact center activity, attributing their metrics to the interval in which an interaction was received by the contact center resource—whether the resource is a mediation DN or a handling resource, such as an agent.

In scenarios in which an agent talks to a customer over day boundaries, all of the talk time is attributed to the first reporting interval and no time is attributed to the latter interval. For example, if an agent talks to a customer over day boundaries (11:45 PM –12:15 AM), all of the talk time (30 minutes) is attributed to the first reporting interval (Day 1) and no time is attributed to the latter interval(s) (Day 2).

Likewise, the count (of 1 interaction) is attributed to the first interval; no count at all is attributed to the second. As such, disposition metrics are additive; their counts from one interval can be added to the counts of other intervals to obtain a total count of activity across all intervals, without double counting.

The following are examples of disposition metrics:

- Activity\Avg Consult Received Time
- BA Customer\% Transfer Initiated Agent
- Q Customer\Hold
- Agent Contact\Preview

## Tip

Special Note about Campaign Disposition Metrics — For metrics that are associated with outbound campaigns, counts and durations are attributed to the interval in which contact attempts were made.

# Customer versus Consult Interactions

The CX Insights Project contains objects that measure only the customer-related legs of interactions or the consultation-related legs of interactions; these objects are described in this document as *customer interaction* and *consult interaction*, respectively. This distinction enables you to create reports that summarize activities that better align with a contact center's core business.

Some metrics mix together these different parts of an interaction life cycle, notably, those that are in the Q Customer & Consults class. Some metrics co-mingle customer interactions with a subset of consult interactions, or warm consultations.

The following table summarizes whether metrics in each project folder incorporate customer-related activity or consultation-related activity; and, if the latter, what type of consultation activity is measured. A few metrics are related neither to customer nor consultation activity; this is indicated in the N/A column. (The Bound metrics in the Service Objects class, for example, do not measure contact center activity; they are provided in an administrative capacity for the derivation of other metrics.)

Table: Customer vs. Consult Interactions in the CX Insights Project

Folder path \ Metric	Customer	Simple Consult	Warm Consult	Warm & Simple	N/A
Queue\Q Customer & Q Consults\ Abandoned Waiting STI\*	<b>✓</b>	<b>√</b>			
Queue\Q Customer & Q Consults\ Accepted Agent STI\*	1				
Agent\Activity: All Consult Warm metrics			<b>√</b>		
Agent\Activity: All other Consult metrics		<b>√</b>			
Agent\Activity: All Accepted, Offered, Responses metrics	1		1		
Agent\Activity: Handle	✓			✓	
Agent\Activity: All other metrics	<b>√</b>				
Outbound Contact\Agent Contact: All Consult Warm			1		

metrics				
Outbound Contact\Agent Contact: All other Consult metrics		1		
Outbound Contact\Agent Contact: All other metrics	/			
Business Attribute\BA Consults: All Consult Warm metrics			1	
Business Attribute\BA Consults: All other Consult metrics		<b>,</b>		
Business Attribute\BA Customer\*: All Accepted metrics	/		1	
Business Attribute\BA Customer\*: All other metrics	/			
Queue\Q Consults: All Consult Warm metrics			/	
Queue\Q Consults class: All other Consult metrics		1		
Outbound Contact\ Contact Attempt \*	/			
Queue\Q Customer: All Accepted metrics (but not the Accept metrics)	/		1	
Queue\Q Customer: All Entered, Distribute(d),	/		/	

and Offered metrics				
Queue\Q Customer: All other metrics	/			
Queue\Q Customer & Consults\*	1		<b>√</b>	
Detail\Handling Attempt: All Customer metrics	1			
Detail\Handling Attempt: All Conference metrics	1			
Detail\Handling Attempt: Revenue, Satisfaction	1		/	
Detail\Handling Attempt: Queue Time, Response Time, Routing Point Time, and Total Duration metrics	1		<b>√</b>	
Agent\State and Reason\ Interaction State	1		✓	
Agent\Detail\ Ixn State class\*	1		1	
Service Objects\*				✓
Agent\Detail\ Session\*	1		✓	
Agent\Detail\ State\*	1		✓	
Agent\State and Reason\*	✓		✓	
Agent\State and Reason\ Summarized State\*	<b>/</b>		<b>/</b>	

# Available Media Types

The **Applicable Media Types Within the Project** table summarizes the applicable media types for groupings of metrics across all of the folders in which they are found. "All Abandon metrics", for instance, applies to all metrics that measure the abandonment of interactions, whether they be consultations that were abandoned, abandoned inviting and waiting metrics, short-abandoned metrics, standard abandons, or abandoned-within-a-service-time-interval metrics including durations, counts, maximums, averages, and percentages thereof.

**Table: Applicable Media Types Within the Project** 

	Voice Media	Sync Media	All Media	N/A
All Abandon metrics		✓		
All Accepted/Not Accepted metrics			1	
All Active Time metrics			1	
All Bound metrics and Is Current Data				✓
All Busy metrics			✓	
All Clear metrics			✓	
All Conference metrics (Note that email media is not applicable to Conference metrics)			1	
All Consult metrics (Note that chat media is not applicable to Consult metrics			/	
All Dial metrics	✓			
All Distributed metrics			/	
All Duration metrics (not to be confused with all metrics that measure duration)			1	
All Engage metrics			✓	
All Entered metrics			✓	
All Finish metrics			✓	
All Handle metrics			✓	
All Hold metrics	✓			
All Invite metrics			✓	

All Offered metrics		✓	
All Outbound metrics	✓		
All Ready/Not Ready/Occupancy metrics		✓	
All Redirected metrics		✓	
All Rejected metrics		✓	
All Response, No Response, and Responded metrics		1	
All Revenue and Satisfaction metrics		1	
All Routed Other metrics		✓	
All Skill metrics		✓	
All Stuck metrics		✓	
All Transfer metrics		✓	
All Unknown metrics		✓	
All Warm metrics	✓		
All Wrap metrics	✓		

Where the listed applicable media types for a particular metric within the group differ from the norm, the differences are noted above (chat media is not applicable to Consult metrics, and email media is not applicable to Conference metrics).

For those metrics that can be classified as belonging to more than one grouping (that is, represented by two or more rows in the table), the most restrictive media-type rule applies. For example, the Consult Received Warm Wrap Time metrics can be classified under:

- "All Consult metrics", which apply to all but chat media.
- "All Warm metrics", which apply only to voice media.
- "All Wrap metrics", which apply only to voice media.

The last two media rules are the most restrictive of the three; therefore, they apply to the Consult Received Warm Wrap Time metrics.

# Source of Info Mart aggregated information

The tables that are created and populated by the aggregation engine are the immediate source of aggregated contact center data for Genesys CX Insights reports. This aggregation engine, Reporting

and Analytics Aggregates (RAA), is deployed during Genesys CX Insights installation, and is described in the RAA documentation.

CX Insights reports are built on data drawn from the aggregated tables, thereby enabling you to view the performance of contact center resources as interactions pass through the resources or are handled by them. The following Info Mart dimension tables provide descriptive attributes:

CALLING_LIST	USER_DATA_CUST_DIM
• CAMPAIGN	• TENANT
DATE_TIME	TIME_RANGE
• RESOURCE_	INTERACTION_TYPE
RESOURCE_GROUP_COMBINATION	INTERACTION_DESCRIPTOR
• GROUP_	RESOURCE_STATE
MEDIA_TYPE	RESOURCE_STATE_REASON

For information about business views of each aggregate subject area, see the *Reporting and Analytics Aggregates User's Guide*. To learn how data is populated to the Info Mart database, see the *Genesys Info Mart User's Guide*.

# Media-neutral metric mapping

Genesys CX Insights reports internal, outbound, and inbound interactions across chat, email, and voice media channels. In order for metrics to apply to media other than voice media, Genesys CX Insights uses media-neutral object names (instead of replicating them, and assigning media-identifying names).

This may be different from what you expect if you are accustomed to voice-centric terminology that is commonly used in contact centers that monitor voice-only interactions. For example, "Avg Engage Time" describes the average length of an active telephone conversation, but you might be more familiar with the name "Avg Talk Time".

# Mapping media-neutral metrics to voice terminology

The table **Mapping media-neutral metrics to voice terminology** can help you to make the transition to media-neutral terminology by providing a mapping of industry-common terms to the names of Genesys CX Insights' media-neutral metrics:

Table: Mapping media-neutral metrics to voice terminology

Voice-Centric Term	Media-Neutral Term in GCXI
Abandoned while Ringing	Abandoned Inviting
ACW (after-call work)	Wrap
Answer	Accept (for chat)

	Response (for email)
Answered in Threshold	Accepted in Threshold
ASA (Average Speed of Answer)	Average Accept Time
Dialing	Inviting or Invite
Login Time	Active Time
Ringing	Alerting or Alert Inviting or Invite (Both Ringing and Dialing constitute Inviting metrics.)
Talk	Engage

## Mapping of Genesys Info Mart Ixn States to Genesys CX Insights Ixn States

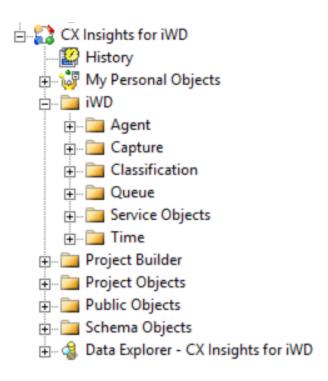
The following table illustrates how Genesys Info Mart prescribes some media-neutral states to interactions that differ slightly from how Genesys CX Insights reflects interaction (ixn) states in the names of some metrics:

<b>Genesys Info Mart Classification</b>	GCXI Classification
Initiate	This is reflected in the Dialing component of Inviting metrics.
Alert	Alerting. This is reflected in the Alerting component of Inviting metrics.
Connect	Engaged.
Hold	Hold.
Wrap	Wrap.
Unknown	Unknown.

This difference is most visible in data that is retrieved by the Agent Details Activity Report. For online media, for example, the report describes the state of an interaction as connected (Connect), whereas you might otherwise expect to see it classified as Engaged. Read more about Genesys Info Mart's classification of interaction states in the relevant reference manual (available in the Genesys Info Mart documentation set); they are described under the INTERACTION RESOURCE STATE table.

# About the CX Insights for iWD project

You can access or edit the the CX Insights for iWD project using the same interfaces described for Genesys CX Insights (above).



### The project hierarchy

- **iWD** folder open this folder to browse objects, such as prompts, attributes, and metrics, organized in a convenient hierarchy. When you are creating or modifying reports, select metrics and attributes from a given subfolder, to ensure compatibility.
- **Public Objects** folder open this folder to browse reports.

To learn more about any object, right-click the object and select **Properties**. The **Properties** dialog appears, providing information, including a description of the object, as shown in the figure **The Properties dialog**. To edit a metric, or view the formula, right-click the metric, and select **Edit**. The **Metric Editor** appears, providing detailed information as shown in the figure **The Metric Editor**. For more information, see **About the CX Insights Project**.

# Metric naming in the Genesys CX Insights for iWD project

Metrics are organized in a hierarchical structure that parallels the reports that the metrics support. In many cases, metrics in different folders/reports share the same name, but the metrics often do not have identical descriptions (see the **Properties** dialog) or definitions (see the **Metric Editor**). Metrics and attributes are grouped by and stored by aggregation views.

Each folder contains all attributes and metrics available for using in appropriate aggregation view. However, attributes and metrics are not duplicated in GCXI Meta model and presented in different folders as shortcuts.

Metrics are sourced from the following aggregation views:

- IWD\_AGG\_TASK\_AGENT\_<time postfix>
- IWD\_AGG\_TASK\_CAPT\_<time postfix>
- IWD\_AGG\_TASK\_CLASSIF\_<time postfix>
- IWD\_AGG\_TASK\_QUEUE\_<time postfix>

Each aggregated view in the Data Mart is suffixed with a time interval:

- \_SUBHR
- HOUR
- DAY
- WEEK
- MONTH
- QRTR
- YEAR.

Metrics for Task Detail Report are sourced from the following iWD Data Mart table:

TASK FACT

### Source of iWD aggregated information

The tables that are created and populated by the iWD Data Mart are the immediate source of aggregated contact center data for Genesys CX Insights for iWD reports.

CX Insights for iWD reports are built on data drawn from the aggregated blended views, thereby enabling you to view the performance of contact center resources as interactions pass through the resources or are handled by them. The following pre-built metrics are available:

<ul> <li>% Finished</li> <li>% Finished Overdue</li> <li>Accept Time</li> <li>Avg Accept Time</li> <li>Avg Finish Time</li> <li>Avg Handle Time</li> <li>Avg Pre Source System Time</li> <li>Avg Source System Time</li> </ul>	<ul> <li>Finish Time</li> <li>Finished</li> <li>Finished Overdue</li> <li>New</li> <li>Pending</li> <li>Pending Overdue</li> <li>Pre Source System Time</li> <li>Source System Time</li> </ul>	<ul> <li>Accepted</li> <li>Avg Handle Time</li> <li>Handle Time</li> <li>Max Handle Time</li> <li>Min Handle Time</li> <li>Entered</li> <li>Exited</li> </ul>
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For more information about iWD aggregate tables, see the iWD Data Mart Reference Guide.

# Troubleshooting project sources

MicroStrategy project sources represent a connection to the metadata database that is used to run the project, and are used to create, manipulate, and administer MicroStrategy projects. Genesys does not provide information about modification at the project level, and it should be attempted only by advanced users. In certain scenarios, the project source can become locked. This section provides information to help you fix this issue by creating a connection to the project source using the **Direct** connection mode, as described in the MicroStrategy documentation. You must:

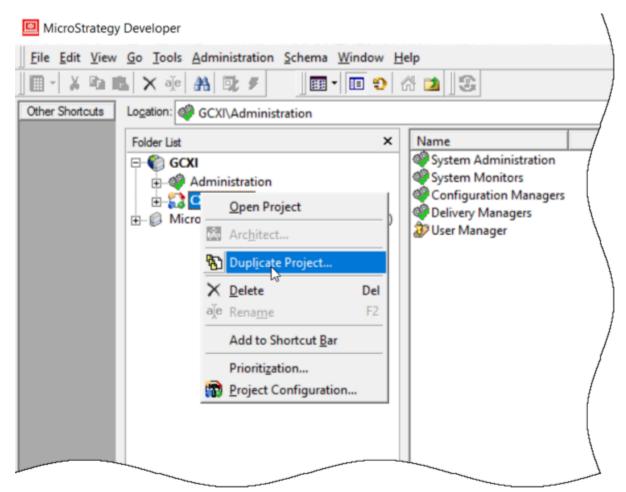
- 1. Create ODBC DSN for the meta database using standard Windows tools (ODBC Datasources).
- To create the connection, you must have Developer installed under Windows. In Developer, click New Project Source, and under Connection Mode, choose Direct. Configure the connection to use the ODBC DSN you created at the previous step.
- 3. If you are running the pre-packaged PostgresSQL server provided in the Installation Package, use the following terminal command to obtain host / port values for the host where the cluster master-node is deployed:

kubectl get services

This allows you to connect to the meta database with limited capabilities (sufficient to unlock the schema).

# Customizing reports

This page provides general information to help you customize the CX Insights Project and reports to achieve additional functionality. The out-of-box historical reports are flexible enough for most business needs. However, Genesys Customer Experience Insights (Genesys CX Insights) is highly customizable, and you can modify the reports to meet your specific needs. Modifying reports can be an involved process, and is recommended for advanced users only. For help, contact your Genesys representative.



Duplicating the Project

Genesys does not recommend modifying the provided reports, as your changes are lost when you upgrade or reinstall. Instead, the easiest way to create custom reports is by starting with a *copy* of a report or project:

You can customize a copy of the project. If you use this method, your changes will be saved in the event
that you upgrade Genesys CX Insights to a later release. This method also ensures that, if you have
trouble with your customizations, you can easily restore the original project. See the figure
Duplicating the Project for information about making a copy of the project using MicroStrategy

#### Developer.

• You can customize a copy of a *report* within the default project or within a duplicated project. If you customize a copy of a report within the default project, your changes are preserved when you upgrade Genesys CX Insights to a later release. See Creating a new report based on an existing report.

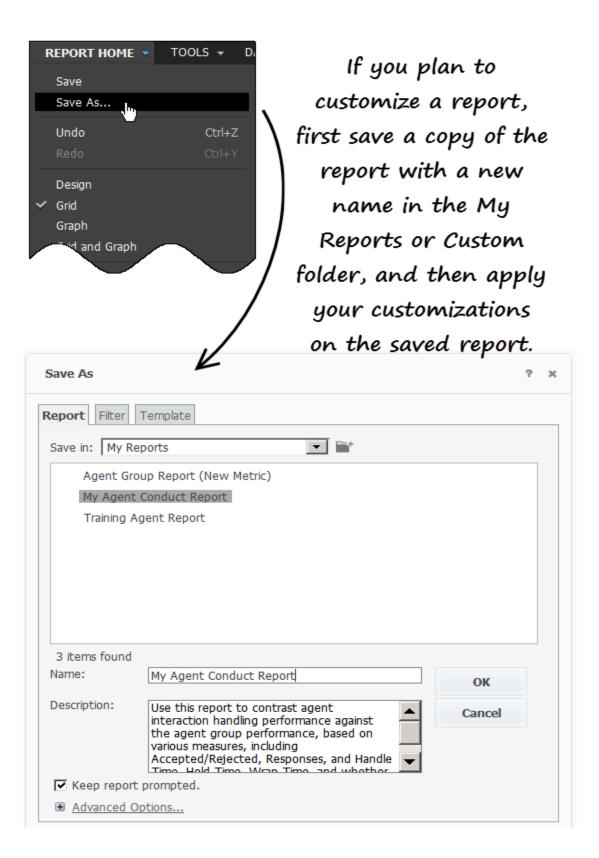
• For detailed information about objects you can add to reports, see the *Genesys CX Insights Projects Reference Guide*, which describes metrics and attributes that are available in Genesys CX Insights.

## Video: Customize reports

#### Link to video

This video describes how to customize historical reports in Genesys CX Insights. Always employ metrics and attributes from a single subfolder — avoid mixing them from multiple subfolders.

Creating a new report based on an existing report



The easiest way to create a new report is to save a copy of an existing report to edit. Begin by browsing through the reports that are provided out-of-box, and select the one that most closely resembles what you'd like to create.

- 1. Log in with an account having Administrator privileges.
- 2. Open and run the report you want to modify.
- 3. In the Save As editor:
  - 1. Click Report Home > Save As.
  - In the Save in field, choose either: Shared Reports > Custom to make the new report
    accessible to other users, or My Reports to make the new report accessible only to you.
  - 3. Enter a Name for the report, and optionally modify the Description, or Advanced Options.
  - 4. Click OK.
- 4. In the Report Saved editor, click Run newly saved report.
- 5. The prompts page opens; make appropriate selections and click **Run Report**. You can now modify the report:
- 6. In the menu, click **Grid** > **Design** to view the Report Objects Editor (if it's not already visible).
- 7. Once you have finished editing the report, click **Save**.

In addition to the many options available when you right-click various areas of the report, you can reorganize the data already in the report by dragging and dropping, add new objects by dragging them into the report from the editor on the left, and so on. It is helpful to enable on-screen buttons (**Tools** > **Search Buttons** / **Pivot Buttons**, for example).

# Removing objects from reports

As you customize the Genesys CX Insights reports to meet your business's needs, there are some specific rules that you should observe with regard to removing undesired attributes and/or metrics from the reports. If you do not follow these recommendations, then under some circumstances, you might encounter database and/or other errors when you run reports.

### Remove Objects from the Presentation Layer

If you remove a metric or attribute from the report's query, you must also remove it from the presentation layer. The converse is not necessarily true, however; if you remove a metric from the presentation layer, you need not remove it from the report's query—though doing so can improve report performance.

### Remove Objects from report templates

When you remove an object from a report, it is still present in the underlying template. If you have removed an object from the report, then you can remove it from the underlying template, which may

improve performance.

A report template is the underlying structure upon which MicroStrategy reports are constructed. The templates specify the layout and formatting of information on the reports, and specifies what information the report should retrieve from which data sources. Templates also define formatting, including fonts, color, alignment, and additional report characteristics such as totals/subtotals, metric thresholds, and so on.

# Blending data from other sources

Genesys CX Insights supports data blending with third-party sources. Using MicroStrategy Web, you can import data, such as a report stored on Salesforce.com or web site statistics data from your Google Analytics account, or from files (Excel or CSV) from your local computer, and use it to create reports or dashboards. Note that data blending requires advanced knowledge, specific account privileges, and an environment configured to support data import from the specified source. For detailed information about importing Salesforce or Google Analytics data, see the following resources, and talk to your administrator about enabling this functionality for your use:

- · Importing data from Google Analytics
- Importing data from a Salesforce.com report

Note that you cannot blend data between Genesys Info Mart and iWD data sources.

# Troubleshooting Incompatibility

It is possible for your custom reports to generate results that are difficult to interpret, to generate errors, or to require excessively long query-processing times when certain combinations of metrics and attributes are included in the report. These conditions can occur under several circumstances, such as:

- Improperly combining incompatible attributes—such as the Queue and State Name attributes—in the same report.
- Improperly combining disposition and interval metrics in the same report.

For this reason, Genesys recommends that when you create or customize new reports, observe the following rules, to minimize problems:

- In any report, employ metrics and attributes from a single subfolder.
- Select one or more Time attribute in every report.

Finally, as is the case with any report design, study the SQL expressions of your generated custom report to ensure that the MicroStrategy engine joins data in the correct way, and that the returned data makes sense.

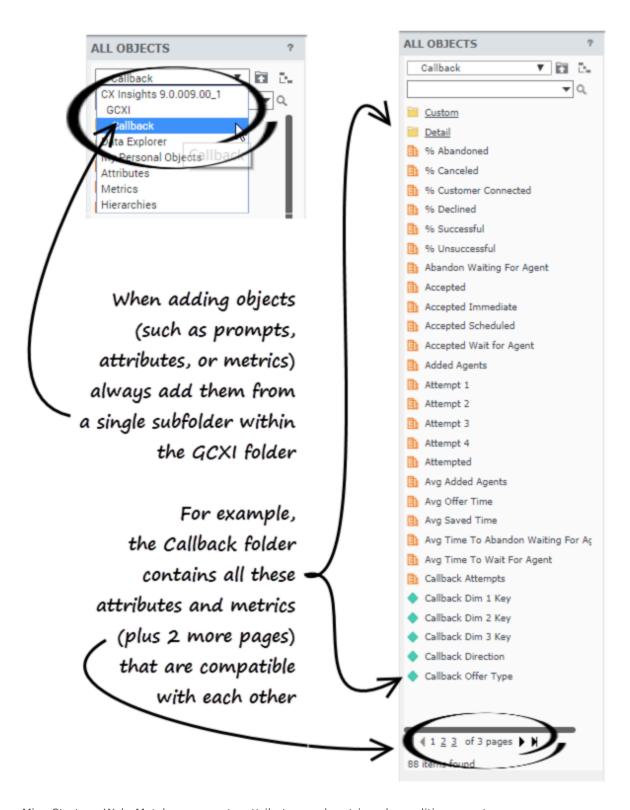
### Double-counting

Interactions pertaining to an object are attributed to each group of which the object is a member. So, in scenarios where an agent is a member of more than one Agent Group, interactions are counted against each group, and can therefore appear more than once in historical reports. The same holds true for Queues that are members of more than one Queue Group; interactions that are attributed to such a queue are reported against both queue groups. This can cause unexpected results in your custom reports.

Customizing reports New In This Release

Incompatible Objects

Customizing reports New In This Release

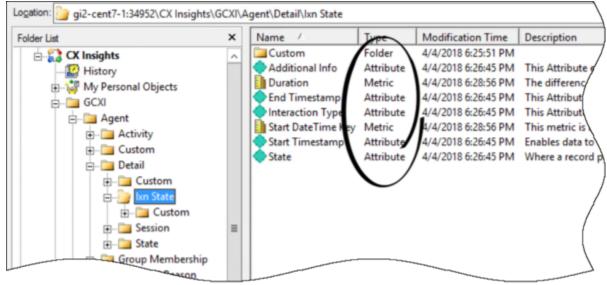


MicroStrategy Web: Match up prompts, attributes, and metrics when editing reports

Customizing reports New In This Release

Incompatibilities can occur if you build a report using metrics and attributes from mismatched folders.

To avoid Incompatibility problems, Genesys strongly recommends that you add objects (prompts, attributes, and metrics) from a given subfolder within the **GCXI** folder. Each subfolder contains a set of attributes and metrics that are designed to work together. Never mix in objects from another folder — even though they may have the same name, they are not compatible.



MicroStrategy Developer: Match up prompts, attributes, and metrics when editing reports

# Using Attached Data

Use the information on this page to customize the GCXI projects and reports, to provide results that are organized based on your own business's user data.

# Configuring Social Media User Data

The Social Engagement Report relies on how user data is configured in your environment, and on the strategies you use to route interactions. This section describes how to set up your environment to report on social media user data. The Social Engagement Report and the objects that directly support it are described on the Agent Social Engagement Report page. Perform the following steps to configure social media user data:

1. Review the routing strategies in your environment with respect to user data and update them as appropriate.

The default Genesys-provided routing strategies do not set the **Sent** reason when responses are sent. You must design your strategy to change the **StopProcessing** reason from Normal to Sent when this event occurs. If you do not do so, the GCXI third-party media reports generate results for transfers only—not for responses.

2. The Genesys Info Mart installation package includes a sample attached-data specification file, ccon\_adata\_spec\_GIM\_example.xml, that controls which user data KVPs Interaction Concentrator (ICON) stores. In it, the required social media KVPs are listed, but commented out. If you base your ICON attached-data specification file on ccon\_adata\_spec\_GIM\_example.xml, uncomment the appropriate rows to enable ICON to record the required data.

In the attached-data specification file, ensure that the following keys are specified:

- Classify\_Actionability\_CtgRelevancy
- · Classify\_Sentiment\_CtgRelevancy
- KloutScore
- CtgName
- · Screen Sentiment CtgName
- · Screen Actionability CtgName
- Classify\_Actionability\_CtgName
- Classify\_Sentiment\_CtgName
- · desktop influence

Place this file in ICON's root directory. Refer to Steps 1 and 2 of Enabling Reporting on User Data in the *Genesys Info Mart Deployment Guide* for detailed instructions.

3. Run make\_gim\_UDE\_template\_<rdbms>.sql against the Info Mart database to create the database objects for social media detail reporting. This SQL script is deployed in the \script subfolder as part of a GCXI installation. Refer to the Application Files chapter of the Reporting and Analytics Aggregates Deployment Guide for more information.

4. Run aggregation in autonomous mode and specify the **setFeature** runtime parameter as follows: -setFeature=eServicesSM

This parameter enables RAA to aggregate social media data, including mapping GEN\_ES\_KEY (in the IRF\_USER\_DATA\_KEYS table) to USER\_DATA\_KEY1 in the H\_ID, H\_AGENT, and H\_AGENT\_QUEUE hierarchies.

Note that USER\_DATA\_KEY1 can be mapped only once per hierarchy. If you previously mapped this field to CUSTOM\_KEY\_10 (as instructed in step 2 of <a href="Example-Custom Handling Attempt Report">Example - Custom Handling Attempt Report</a>) for the <a href="Product Line">Product Line</a> example, then consider mapping USER\_DATA\_KEY2 to CUSTOM\_KEY\_10 instead.

Refer to the *Reporting and Analytics Aggregates User's Guide* to learn how to run aggregation in this autonomous mode.

Your environment is ready to process social media user data for each interaction, and RAA is equipped to aggregate this data. You can now use the Agent Social Engagement and Social Engagement reports to retrieve meaningful data.

The following section describes additional objects, some of which indirectly support social media user data reporting.

# User Data Objects in Project

The Predefined User Data Objects table lists key objects that are related to user data.

#### **Predefined User Data Objects**

Agent\Activity				
	ame (M=Metric, A = Dimension)	User Data Table and Field	Char or Numeric	
М	Actionability	AG2_AGENT_*.ACTIONABILITY AG2_AGENT_GRP_*.ACTIONABILITY AG2_AGENT_QUEUE_*.ACTIONABILITY AG2_AGENT_QUEUE_*.ACTIONABILITY	T'Numeric	
М	Influence Score	AG2_AGENT_*.INFLUENCE AG2_AGENT_GRP_*.INFLUENCE AG2_AGENT_QUEUE_*.INFLUENC	Numeric	
М	Offered with Actionability	AG2_AGENT_*.ACTIONABILI AG2_AGENT_GRP_*.  ACTIONABILI AG2_AGENT_QUEUE_*.  ACTIONABILI	TN9FFEPEP	
М	Offered with Influence	AG2_AGENT_*.INFLUENCE	OFFERED	

Agent\Activity				
		AG2_AGENT_GRP_*.INFLUENCE_C		
М	Offered with Sentiment	AG2_AGENT_*.SENTIMENT AG2_AGENT_GRP_*.SENTIMENT_ AG2_AGENT_QUEUE_*.SENTIMEN	- ONEMeric	
М	SentimentScore	AG2_AGENT_*.SENTIMENT AG2_AGENT_GRP_*.SENTIMENT AG2_AGENT_QUEUE_*.SENTIMEN	Numeric	
		ty User Data Example		
А	Dimension 1 Dimension 2 Dimension 5	USER_DATA_CUST_DIM_1.I  USER_DATA_CUST_DIM_1.DIM_AT  USER_DATA_CUST_DIM_1.DIM_AT	TRIBUTE_2 Char	
А	Dimension 6 Dimension 10	USER_DATA_CUST_DIM_2.I  USER_DATA_CUST_DIM_2.DIM_AT	Char	
А	Screen Actionability Category	USER_DATA_GEN_ES.SCRE ACTIONABILITY_CTGNAM	_	
А	Screen Sentiment Category	USER_DATA_GEN_ES.SCRE SENTIMENT_CTGNAME	EN_ Char	
	Business Attribu	ıte\BA Customer		
M	Actionability Score	AG2_ID_*.ACTIONABILITY	Numeric	
M	Entered with Actionability	AG2_ID_*.ACTIONABILITY_	ENUERED	
M	Entered with Influence	AG2_ID_*.INFLUENCE_ENT	E <b>NE</b> Dneric	
M	Entered with Sentiment	AG2_ID_*.SENTIMENT_ENT	<b>ER</b> MEDIC	
M	Influence Score	AG2_ID_*.INFLUENCE	Numeric	
М	Sentiment Factor	a factor of BA User Data Example\Classify Sentiment Category	Numeric	
M	Sentiment Score	AG2_ID_*.SENTIMENT	Numeric	
Business Attribute\BA User Data Example				
A	Dimension 1	USER_DATA_CUST_DIM_1.I	DIMI_AATTRIBUTE_1	

Agent\Activity				
	Dimension 2 Dimension 5	USER_DATA_CUST_DIM_1.DIM_ATTRIBUTE_2 USER_DATA_CUST_DIM_1.DIM_ATTRIBUTE_5		
А	Dimension 6 Dimension 10	USER_DATA_CUST_DIM_2.DIM_ATTRIBUTE_1 Char USER_DATA_CUST_DIM_2.DIM_ATTRIBUTE_5		
А	Screen Actionability Category	USER_DATA_GEN_ES.SCREEN_ ACTIONABILITY_CTGNAME  Char		
А	Screen Sentiment Category	USER_DATA_GEN_ES.SCREE®har SENTIMENT_CTGNAME		
De	etail\Handling Attempt\H	andling User Data Example		
Α	Detail 1  Detail 2  Detail 14  Detail 15  Detail 16	IRF_USER_DATA_CUST_1.CUST@M_DATA_1 IRF_USER_DATA_CUST_1.CUSTOM_CHATIA_2 IRF_USER_DATA_CUST_1.CUSTOM_CHATIA_14 IRF_USER_DATA_CUST_1.CUSTOM_CDATIA_ric5 IRF_USER_DATA_CUST_1.CUSTOM_CDATIA_ric6		
А	Dimension 1 Dimension 2 Dimension 5	USER_DATA_CUST_DIM_1.DIM_ATTRIBUTE_1  USER_DATA_CUST_DIM_1.DIM_ATTRIBUTE_2 Char  USER_DATA_CUST_DIM_1.DIM_ATTRIBUTE_5		
А	Dimension 6 Dimension 10	USER_DATA_CUST_DIM_2.DIM_ATTRIBUTE_1 Char USER_DATA_CUST_DIM_2.DIM_ATTRIBUTE_5		
Queue\Queue User Data Example				
А	Dimension 1 Dimension 2 Dimension 5	USER_DATA_CUST_DIM_1.DIM_ATTRIBUTE_1  USER_DATA_CUST_DIM_1.DIM_ATTRIBUTE_2 Char  USER_DATA_CUST_DIM_1.DIM_ATTRIBUTE_5		
А	Dimension 6	USER_DATA_CUST_DIM_2.DIM_ATTRIBUTE_1 Char		

Agent\Activity				
	Dimension 10	USER_DATA_CUST_DIM_2.DIM_ATTRIBUTE_5		
	Detail\Transfer\Source	ce User Data Example		
А	Dimension 1 Dimension 2 Dimension 5	USER_DATA_CUST_DIM_1.DIM_ATTRIBUTE_1  USER_DATA_CUST_DIM_1.DIM_ATTRIBUTE_2 Char  USER_DATA_CUST_DIM_1.DIM_ATTRIBUTE_5		
А	Dimension 6 Dimension 10	USER_DATA_CUST_DIM_2.DIM_ATTRIBUTE_1 Char USER_DATA_CUST_DIM_2.DIM_ATTRIBUTE_5		
	Detail\Transfer\Targe	et User Data Example		
А	Dimension 1 Dimension 2 Dimension 5	USER_DATA_CUST_DIM_1.DIM_ATTRIBUTE_1  USER_DATA_CUST_DIM_1.DIM_ATTRIBUTE_2 Char  USER_DATA_CUST_DIM_1.DIM_ATTRIBUTE_5		
А	Dimension 6 Dimension 10	USER_DATA_CUST_DIM_2.DIM_ATTRIBUTE_1  Char  USER_DATA_CUST_DIM_2.DIM_ATTRIBUTE_5		
	Queue\Queue Us	ser Data Example		
А	Dimension 1 Dimension 2 Dimension 5	USER_DATA_CUST_DIM_1.DIM_ATTRIBUTE_1  USER_DATA_CUST_DIM_1.DIM_ATTRIBUTE_2 Char  USER_DATA_CUST_DIM_1.DIM_ATTRIBUTE_5		
А	Dimension 6 Dimension 10	USER_DATA_CUST_DIM_2.DIM_ATTRIBUTE_1 Char USER_DATA_CUST_DIM_2.DIM_ATTRIBUTE_5		

# User data key table mapping

The following tables — Low Cardinality — Key table mapping and High Cardinality — Key table mapping — describe the default / recommended mapping for user data tables.

## Low Cardinality — Key table mapping

		w caramancy	key table mappi	9	
	Key table mapping				
GCXI / Object name	Genesys Info Mart database table name	Dimension table PK name	UDE key name <-> IRF_USER_DATA	GCXI Schema LKEYS	Comments
CX Insights\ GCXI\Business Attribute \Business Result	INTERACTION_DE	SIGNERACTION_DE	ESI <b>CIRIERA</b> CRI_IICEN_DE	SAB2PT&RLMEERA	CTION_DESCRIPTC This table is provided with
CX Insights\ GCXI\Business Attribute \Customer Segment					the default schema to store Genesys- defined, low- cardinality KVPs, such as
CX Insights\ GCXI\Business Attribute \Service Type					service type and customer segment. This table requires
CX Insights\ GCXI\Business Attribute \Service SubType					no customization.
CX Insights\ GCXI\User Data Example \Dimension 1- Dimension 5	USER_DATA_CUS	T <u>I</u> DIM_1	CUSTOM_KEY_1	AG2_xxx.USER_D	DATA_KEY1
CX Insights\ GCXI\User Data Example \Dimension 1- Dimension 5	USER_DATA_CUS	T <u>I</u> DIM_2	CUSTOM_KEY_2	AG2_xxx.USER_D	OATA_KEY2
CX Insights\ GCXI\User Data Example \GSW Call Type, Dimension 2 Gen - Dimension 5 Gen	USER_DATA_GEN	_DDM_1	USER_DATA_GEN	_DANGN2_KAGXKDUSER_D	OATA_GEN_KEY1
CX Insights\ GCXI\User Data Example \Dimension 6 Gen - Dimension 10 Gen	USER_DATA_GEN	_DDM_2	USER_DATA_GEN	_DANGN2_KAEXK_DISER_D	OATA_GEN_KEY2

**High Cardinality** — Key table mapping

	Key table mapping					
GCXI / Object name	Genesys Info Mart database table name	Dimension table PK name	UDE key name <-> IRF_USER_DATA	GCXI Schema LKEYS	Comments	
CX Insights\ GCXI\Detail\ Handling Attempt\ Handling User Data Example \Detail 1 - Detail 16	IRF_USER_DATA_	C <b>USI</b> TIOM_DATA_[:	1-1 <b>1</b> 6]	IRF_USER_DATA_	CUST_1.CUSTOM_[	DATA_[1-16]
CX Insights\ GCXI\Detail\ Handling Attempt \Case ID	IRF_USER_DATA_	GEM <u>s</u> e_Id	na	IRF_USER_DATA_	GEN_1.CASE_ID	
CX Insights\ GCXI\Detail\ Handling Attempt \Customer_ID	IRF_USER_DATA_	g <b>en</b> stomer_id	na	IRF_USER_DATA_	GEN_1.CUSTOMER	_ID
CX Insights\ GCXI\Detail\ Handling Attempt \Revenue	IRF_USER_DATA_	G <b>R®</b> ⊻ <b>E</b> NUE	na	IRF_USER_DATA_	GEN_1.REVENUE	
CX Insights\ GCXI\Detail\ Handling Attempt \Satisfaction	IRF_USER_DATA_	G <b>EN</b> TIBFACTION	na	IRF_USER_DATA_	GEN_1.SATISFACTI	ON

# Using the Predefined User Data Objects

If the user data that you configured within your environment exactly matches the sample tables that have been imported into the Project—as well as their structure—all you have to do to use the predefined user data objects in custom reports is make visible the corresponding objects, and save the project. The objects will be revealed to report designers and can be used in reports. If, however, your user data configuration employs different tables or table structure, perform the following steps:

- 1. If necessary, add the appropriate user data table(s) to the GCXI schema. (See step 4 of Example Custom Handling Attempt Report.)
- 2. Alter user data object definitions if you want. For example::
  - Fields in the IRF USER DATA CUST \* tables could be numeric or character.
  - If your user data table is named differently from that which is used in the table above.

• If you want the attribute to reference a field different from that which is already defined for the object.

- If you want to have the attribute available as a user prompt on a custom report. (See step 5 of Example Custom Handling Attempt Report)
- If you want to rename the predefined folders, attributes, or metrics.
- 3. Save the project.

# Special Note about Numeric User Data

The Customer Perspective Report includes four measures that are based on numeric user data—**Revenue**, **Satisfaction**, **Avg Revenue**, and **Avg Satisfaction**. Running aggregation (to populate the data for this report) will yield errors if users are permitted to attach non-numeric data for these business attributes to interactions. You must ensure that the resources that set the values of Revenue and Satisfaction user data keys are configured or trained, as applicable, to record numerical values only. Refer to Check for Incorrect Data Type in the *Reporting and Analytics Aggregates User's Guide* to learn how to recover from this situation.

In addition to the information on this page, see:

Example - Custom Handling Attempt Report

# Example - Custom Handling Attempt Report

This customization example shows how you can modify the Handling Attempt report to show your custom data.

# 1. Creating User Data Dimension Tables

Create and populate one or more user data tables in the Info Mart database — Within the Info Mart database, create and populate a custom user data dimension table (for example, USER\_DATA\_CUST\_DIM\_10). The USER\_DATA\_CUST\_DIM\_x tables store information about changes in data that accompany telephony events that are recorded by Interaction Concentrator (ICON) and further processed by Genesys Info Mart ETL runtime processes. Genesys Info Mart writes to these tables up to five descriptors of your business data. This example populates two fields: PRODUCT\_LINE with product line data and PRODUCT\_CODE with product code data.

Refer to the relevant Genesys Info Mart Physical Data Model Documentation for your RDBMS (available on docs.genesys.com) for the complete data model of the USER DATA CUST DIM \* tables.

# 2. Mapping User Data Keys and Columns

Configure user data keys in the aggregation tables to point to your user data table(s) and populate the aggregation tables. — The information in this section describes how to configure user data keys and columns in the Info Mart database Mapping and Aggregation tables.

#### User Data Mapping Tables in Info Mart

Deployment-specific attributes, in the form of user-defined attached data, are represented in the Genesys Info Mart model both by low-cardinality data (in string format) and high-cardinality data (in numeric, date/time, and string formats). Low-cardinality-string user data that is associated with an interaction resource—such as automobile models and product codes—is stored in the IRF\_USER\_DATA\_KEYS and USER\_DATA\_CUST\_DIM\_x dimension tables. High-cardinality user data that is associated with an interaction resource—such as prices, number of widgets sold, and dates—is stored in the IRF\_USER\_DATA\_GEN\_1 and IRF\_USER\_DATA\_CUST\_x fact extension tables. In addition to these tables are the CTL\_UD\_TO\_UDE\_MAPPING and CTL\_UDE\_KEYS\_TO\_DIM\_MAPPING tables that you must update:

- CTL\_UD\_TO\_UDE\_MAPPING ties in user data keys that are defined in the underlying ICON application with user data columns that are defined in the tables mentioned above.
- CTL\_UDE\_KEYS\_TO\_DIM\_MAPPING maps the user data dimension tables (USER\_DATA\_CUST\_DIM\_x) to IRF USER DATA KEYS.

Execute the sample script (Sample SQL Script for Creating and Mapping User Data) to set up user data mapping and recording in your environment. Also, refer to the:

- Interaction Concentrator Deployment Guide.
- make\_gim\_UDE\_template.sql script, provided with Genesys Info Mart deployment. Note that RAA deploys scripts with similar names—make\_gim\_UDE\_template\_<rdbms>.sql. These scripts, however, hold entirely different content and are designed to configure user data for social media measures.
- Mapping User Data Worksheet in the *Genesys Info Mart Deployment Guide*. This worksheet contains several columns that you can use to record information about the specific attached data keys in use in your environment. Consider adding each custom attached data table in use within your environment to this worksheet.
  - Refer to Special Note about Numeric User Data for information about configuring keys for Revenue and Satisfaction user data.
  - The instructions in step 4 (below) for adding user data dimensions to the project and customizing the reports apply to all of the fields in this document, and is required only if you plan to use tables other than the default Genesys Info Mart tables.

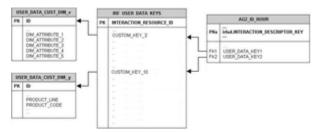
Predefined attached data also appears in other Info Mart database tables, including the following:

- INTERACTION\_DESCRIPTOR (fields CUSTOMER\_SEGMENT, SERVICE\_TYPE, SERVICE\_SUBTYPE, BUSINESS\_RESULT)
- STRATEGY
- REQUESTED\_SKILL
- ROUTING\_TARGET

Using the attached data from these tables falls outside the scope of this section. Several reports, however, are provided for all of the attached data-related fields in the INTERACTION\_DESCRIPTOR table.

## Configuring User Data Keys in the Aggregation Tables

The AG2\_AGENT, AG2\_AGENT\_CAMPAIGN, AG2\_AGENT\_QUEUE, AG2\_CAMPAIGN, and AG2\_ID aggregate tables provide two key columns each that you can configure to join to two user data dimension tables of your choice. The AG2\_QUEUE, QUEUE\_ACC, and QUEUE\_ABN tables are also configured to support USER\_DATA\_KEY1 and USER\_DATA\_KEY2. The user data dimension tables store low-cardinality, string data only. The AG2\_AGENT\_GRP aggregate tables also provide two such columns, but their values are inherited from the AG2\_AGENT tables. The USER\_DATA\_KEY fields are not available in the agent session, agent states, agent interval, and queue-only aggregate tables.



Mapping User Data Keys in the Aggregate Tables/ Views to User Data Dimensions

#### These columns are:

 USER\_DATA\_KEY1—A key that points to one dimension table, such as USER\_DATA\_CUST\_DIM\_10, storing five dimensions

• USER\_DATA\_KEY2—A key that points to a second dimension table, storing another five dimensions

These two fields provide access to a total of 10 attached data dimensions—or two hierarchies—for each aggregate table and view, as shown in the figure to the right. You must configure the aggregation job to aggregate and populate these fields.

Our product-line example uses the business attribute aggregate set, AG2\_ID\_\*, which consists of four tables and three views. We must configure the USER\_DATA\_KEY1 column in each to point to the custom user data dimension table, USER\_DATA\_CUST\_DIM\_10. For more information about how to map the USER\_DATA\_KEY2 field, see How Do I Configure User Data for Aggregation? in the Reporting and Analytics Aggregates User's Guide.

1. Create a text file having the following content on a single line:

```
(map-user-data-key (hierarchy: H_{ID}) (dimension: USER_DATA_KEY1) (expression: irfud.CUSTOM_KEY_10))
```

2. Save the file in the Genesys Info Mart root directory with the name user-data-map.ss.

The next time Genesys Info Mart Server restarts, the aggregation process detects this file, and aggregation begins.

Refer to the relevant Reporting and Analytics Aggregates physical data model documentation (available on docs.genesys.com) for a data model of the aggregation tables in the Info Mart database, and the relevant Genesys Info Mart physical data model documentation (available on docs.genesys.com) for information about the structure of the USER DATA CUST DIM \* tables.

# 3. Configuring User Data Storage

Set Genesys Info Mart and Interaction Concentrator configuration options for collection of user data.

— Several options are available that you can use to configure what data is written to the Info Mart database, and how long data is retained. In particular, you can configure storage of user data as follows:

- On Interaction Concentrator, by means of the attached data specification file (adata\_spec.xml) and ICON configuration options, such as **EventData**, for event-based user data.
- On Genesys Info Mart, by means of customizable SQL scripts to create mapping and storage tables in the Info Mart database.

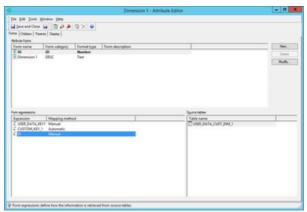
Some of these options apply specifically to user data. Interim releases of Genesys Info Mart and Interaction Concentrator might also introduce new configuration options that affect results. Review the following documents for a listing and description of these options:

- · Genesys Info Mart Deployment Guide
- Genesys Info Mart Release Notes

- · Interaction Concentrator Deployment Guide
- Interaction Concentrator Release Notes

# 4. Modifying the Project warehouse

If you plan to configure attached data based on tables other than the default Genesys Info Mart tables, use the following procedure to modify the project warehouse.



The Attribute Editor

- 1. Open MicroStrategy Developer, and open the CX Insights project. This requires a login account with appropriate credentials.
- 2. In the main menu, click **Schema > Warehouse Catalog**. The **Warehouse Catalog** dialog appears:
  - 1. In the **Tables available in the database instance** list, select USER\_DATA\_CUST\_DIM\_10 table, and click > to move it to the **Tables being used in the project** list.
  - 2. Click Save and Close
- 3. In the MicroStrategy Developer folder list, navigate to the folder **CX Insights** > **Schema Objects** > **Tables**, and verify that the USER\_DATA\_CUST\_DIM\_10 table is now visible.
- 4. In the MicroStrategy Developer folder list, open the folder CX Insights > GCXI > User Data Example, right-click one of the standard attributes Dimension 1 Dimension10, and choose Edit. The Attribute Editor appears:
  - 1. Modify the attribute to use the USER DATA CUST DIM 10 table in the ID attribute form.
  - 2. Change Dimension x form to link it to the custom column PRODUCT\_LINE or PRODUCT\_CODE:

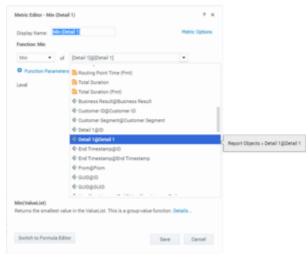
```
( PRODUCT_LINE VARCHAR(170) NOT NULL DEFAULT 'none', PRODUCT_CODE VARCHAR(170) NOT NULL DEFAULT 'none',)
```

- Repeat the previous two steps for each of the remaining **Dimension 1 Dimension10** attributes.
   Note that if attached data is previously configured (using default GCXI project objects), changes you make here can affect data in reports.
- 4. Click Save and Close.
- 5. Click **Schema** > **Update Schema** to update the project schema.

The attributes are now ready to be used in reports.

# 5. Modifying the Handling Attempt Report

In Genesys CX Insights / MicroStrategy, you can easily add attached data as attributes, and then display the results either as attributes, or as metrics. This procedure shows how you can customize the Handling Attempt Report to display the data from custom attributes as metrics.



The Metric Editor

- 1. Open the Handling Attempt Report in edit mode.
- 2. Click ALL OBJECTS, and navigate to GCXI\Detail\Handling Attempt\Handling User Data Example.
- 3. Drag an attribute into the report, for example **Detail 1**.
- 4. Right-click the column where the Detail 1 attribute appears in the report, and select **Insert Metric**\ **Maximum**.
- 5. Click **REPORT OBJECTS**.
- 6. Right-click the metric Min (Detail 1), and select Edit. The Metric Editor appears.
- 7. Optionally, rename the metric.
- 8. Correct the function so that it uses the **Detail 1** form of the Detail 1 attribute, instead of ID form Detail 1@Detail 1.
- 9. Click Save.
- 10. Right-click the Detail 1 attribute, and select **Remove from Grid**.
- 11. Optionally, reorganize the order of the columns by dragging the Detail 1 metric column to the preferred position in the report.
- 12. Save and run the report to validate the data.

# Sample SQL Script for Creating and Mapping User Data

The following sample script provides the SQL code that is used for this example (in step 2. Mapping User Data Keys and Columns). Note that this is a sample script only. You should validate it for use within your environment.

```
IF EXISTS ( SELECT 1
    FROM sysobjects
    WHERE id = object id('USER DATA CUST DIM 10') AND type = 'U')
    DROP TABLE USER_DATA_CUST_DIM_10
CREATE TABLE USER DATA CUST DIM 10 (
    ID
                    INT identity
    TENANT KEY
                     INT NOT NULL
    CREATE AUDIT KEY INT NOT NULL
    PRODUCT_LINE PRODUCT_CODE
                     VARCHAR(170) NOT NULL DEFAULT 'none',
                     VARCHAR(170) NOT NULL DEFAULT 'none'
    DIM_ATTRIBUTE_3 VARCHAR(170) NOT NULL DEFAULT 'none',
    DIM ATTRIBUTE 4 VARCHAR(170) NOT NULL DEFAULT 'none',
    DIM_ATTRIBUTE_5 VARCHAR(170) NOT NULL DEFAULT 'none',
    CONSTRAINT PK_USER_DATA_CUST_DIM_10 PRIMARY KEY(ID) )
SET IDENTITY_INSERT USER_DATA_CUST_DIM_10 ON;
-- This row is for the predefined key 'UNKNOWN'. It is
-- mandatory. Do not remove it!
INSERT INTO USER DATA CUST DIM 10 (
    TENANT KEY,
    CREATE AUDIT KEY )
VALUES (-1, -1, -1);
-- This row is for the predefined key 'NO VALUE'. It is
-- mandatory. Do not remove it!
INSERT INTO USER DATA CUST DIM 10 (
    TENANT KEY,
    CREATE_AUDIT_KEY )
VALUES (-2, -2, -1);
SET IDENTITY_INSERT USER_DATA_CUST_DIM_10 OFF;
-- Add a foreign key reference column from IRF_USER_DATA KEYS
-- to the user data dimension table.
-- Note: Adding columns to a sizeable IRF USER DATA KEYS table
-- could consume significant DBMS resources and time. Consider the
-- tradeoff between:
-- (1) adding redundant columns initially and adding/activating
     mapping later and
-- (2) adding columns later.
ALTER TABLE IRF USER DATA KEYS
   ADD CUSTOM KEY 10 INT NOT NULL DEFAULT -2
-- Add mapping between user data dimension table and
```

```
-- IRF USER DATA KEYS to CTL UDE KEYS TO DIM MAPPING
INSERT INTO CTL_UDE_KEYS_TO_DIM_MAPPING (
    DIM TABLE NAME,
    DIM_TABLE_PK_NAME,
    UDE_KEY_NAME )
VALUES (
    'USER_DATA_CUST_DIM_10',
    'ID',
    'CUSTOM_KEY_10' )
G0
-- Add mapping between user data keys and user data tables to
-- CTL_UD_TO_UDE_MAPPING.
-- Note: ICON should be configured to record these user data keys.
INSERT INTO CTL_UD_TO_UDE_MAPPING (
    UD KEY NAME
    UDE TABLE NAME
    UDE_COLUMN_NAME
    PROPAGATION RULE,
    DEFAULT VALUE
    ACTIVE_FLAG )
VALUES (
    103
    'CustomProductLine'
    'USER_DATA_CUST_DIM_10',
    'PRODUCT_LINE'
    'CALL'
    1)
G0
INSERT INTO CTL_UD_TO_UDE_MAPPING (
    UD_KEY_NAME
    UDE_TABLE_NAME ,
UDE_COLUMN_NAME ,
    PROPAGATION_RULE,
    DEFAULT VALUE
    ACTIVE_FLAG )
VALUES (
    104
    'CustomProductCode'
    'USER_DATA_CUST_DIM_10',
    'PRODUCT_CODE'
    'CALL'
    1 )
G0
```

# Managing performance

This page describes steps you can take to improve the performance of Genesys Customer Experience Insights (Genesys CX Insights).

# Optimizing report filtering

Filtering in Genesys CX Insights reports has been optimized to improve report performance. Two types of filters are used, depending on different data sampling approaches:

- **Optimized filters** In order to optimize performance in most scenarios, a special report is used as a filter. The results of the special filter report are loaded into memory, and used as a filter for the main report. Most reports use these date and time filters (see Reports that use the standard filter for a list of the ones that do not).
- **Standard filters** These filters are part of the SQL expression, and fall into the WHERE operator in the main SQL expression for receiving the report dataset.

The **optimized** filter reports are stored in a folder — **CX Insights\Public Objects\Reports\CX Insights\Service** — that is visible only to reports Developers:

- Pre-set and Date
- · Pre-set and Date Range
- · Pre-set and Day and Time Range

The **standard** filters are stored in the **CX Insights\GCXI\Time** folder, and include:

- Pre-set and Date
- · Pre-set and Date Range
- Pre-set and Day and Time Range

#### Reports that use the standard filter

The following reports use the standard date and time report filter:

- CX Insights\Details\Transfer Detail Report
- CX Insights\Details\Interaction Handling Attempt Report
- CX Insights\Predictive Routing\Predictive Routing Detail Report
- CX Insights\Callback\Callback Details Report
- CX Insights\Co-browse\Co-browse Summary Report
- CX Insights\Agent\Agent Group Business Attribute Report

- CX Insights\Agent\Agent Group Interaction Handling Report
- CX Insights\Agent\Agent Group Membership Details Report
- CX Insights\Agent\Agent Interaction Hierarchy Report
- CX Insights\Agent\Agent Utilization Report
- CX Insights for iWD\all reports

All other reports use the optimized date time filters.

# Procedure: Resolving timeout problems

**Purpose:** The performance of SQL-based reports can vary depending on the data in your database, so in some circumstances, reports that use the optimized filters can run more slowly than expected, and, in some cases, timeouts can occur. To resolve this issue, Genesys recommends changing the affected report to use the standard date and time filters. Use the steps in this procedure to remove the special optimized filter from a report, and replace it with a standard filter.

#### Steps

- · Log in to MicroStrategy Web using an account with Developer or Administrative rights.
- · Open the report.
- Run the report, and click "Design" to open Design mode.
- In the Report Filter panel, click the **X** next to the optimized filter you want to remove (for example **Pre-set and Date**).
- At the bottom-left corner of the screen, click **ALL OBJECTS**.
- Open the **GCXI/Time** folder, find the standard filter object with the same name as the one you removed (for example, **Pre-set and Date**), and drag it into the Report Filter panel to replace the one you removed.
- Using the **Shift Up** arrow next to the newly added filter, move it to the top of the list (into the same position as the one you removed).
- Save and close the report.

# Optimal time to run reports

The Genesys CX Insights historical reports provide a snapshot of contact center and enterprise activity as of the most recent transformation and aggregation in the Info Mart database. For completed interactions in completed reporting intervals that occurred prior to the last transformation and aggregation runs, the reports provide consistent results each time the reports are run. However,

results can differ for interactions that are still active, or for intervals that are incomplete. For example, running a month-type report mid-month yields results that differ from those that are obtained by running the same monthly report at the end of the month.

## **Important**

As with other Genesys applications, Genesys CX Insights requires that your system GMT (Greenwich Mean Time) setting be accurate and synchronized among the servers in your environment.

The headers of each report display the report date (which is the date and time when the report was run) rather than the date and time when the most recent transformation job was run. In fact, the date and time when the most recent transformation job was run are not reflected in the report, even though it is that date and time at which contact center activity is reflected by the report data.

For the smaller aggregation levels, the variances in report results are more pronounced, given the configuration within the Genesys Info Mart application of the data chunk size that is to be transformed. Genesys Info Mart is an historical-reporting application, therefore you must give care to the interpretation of report results when you use Genesys CX Insights as a near real-time tool to obtain daily reports (for example, when the day has not yet completed or has only recently completed).

Many factors contribute to latency in data availability between the date and time of the most recent transformation and aggregation run, and the date and time when the report is run, including the following:

- Scheduling of ETL jobs and job performance.
- Interaction volume, and the number of segments per interaction.
- Number of configured key-value pairs.
- Hardware and RDBMS that are used in your environment.
- Performance of ICON's merge procedure.

Read more about these factors in the Genesys Info Mart documentation, and in the Genesys Hardware Sizing Guide.

# Accessing log information

MicroStrategy provides detailed diagnostic logging capabilities that can help you to troubleshoot problems you may encounter. By default, these logs are stored in subfolders below /mnt/log. The path is specified in the volumeMounts section of qcxi.yaml:

mountPath: /mnt/log

name: log

Genesys CX Insights logs certain components by default; other are logged only if you enable them.

Depending on the release of MicroStrategy in your environment, the list of what logging is enabled varies; for example, in MicroStrategy 2021 Update 4.1, the following logs are generated:

```
Authentication Server@@Warning, Distribution Service@@Create Job Details@DS Request Details@DS Trigger Details@Delivery Details@Info@Persist Result Details@Scheduler Details@Summary, Odbc@@Error, Query Engine@@Warning, SMTPSender@@Trace
```

Each log file has a specified maximum size. When a MicroStrategy log file reaches its maximum size, the file is renamed with a .bak extension, and a new log file is created using the same file name.

For example, if the **DSSErrors.log** file reaches its maximum size, MicroStrategy renames it as **DSSErrors.bak**, and creates a new **DSSErrors.log** file. **DSSErrors.log** is the main error log recorded by the MicroStrategy Intelligence Server, and is the first log file you should examine when troubleshooting an issue with MicroStrategy Intelligence Server.

#### Check the log configuration

To find out what logs are configured in your environment, execute the following command inside the GCXI container

```
/var/opt/MicroStrategy/bin/mstrctl -s IntelligenceServer gsc \mid xmlstarlet sel -t -c "//configuration/log_destinations" \mid xmlstarlet fo
```

By default, a limited set of MicroStrategy logs are preconfigured. For example, in MicroStrategy 2021 Update 4.1, the following logs are configured in the file **mstr log.xml**:

```
<log_destinations>
    <log_destination n="SystemLog" tp="2" callstack_message_ids="0x800438C7"/>
    <log_destination n="ServerControl" tp="3" max_size="2048" max_backup="1"
callstack_message_ids=""/>
    <log_destination n="Query_Merge" tp="3" max_size="200" callstack_message_ids=""/>
    <log_destination n="MigrationSQL" tp="3" max_size="51200"
callstack_message_ids="0x800438C7"/>
    <log_destination n="MetadataObjectTelemetry" tp="3" max_size="2048"
callstack_message_ids=""/>
    <log_destination n="LicenseSummary" tp="3" max_size="4000" callstack_message_ids=""/>
    <log_destination n="DebugOutput" tp="1" callstack_message_ids=""/>
    <log_destination n="DSSPerformanceMonitor" tp="4" max_size="2000" callstack_message_ids=""/>
    <log_destination n="DSSErrors" tp="3" max_size="131072" max_backup="1"
callstack_message_ids="0x800438C7"/>
    <log_destination n="DSSCap" tp="3" max_size="2048" callstack_message_ids=""/>
    <log_destination n="BlockedURL" tp="3" max_size="2048" callstack_message_ids=""/>
    </log_destination n="BlockedURL" tp="3" max_size="2048" callstack_message_ids=""/>
    </log_destinations>
```

For more information about parameters in mstr log.xml, see the MicroStrategy website.

## Modify logging

Use the information in this section to control what components are logged.

Procedure: Configuring logging

**Purpose:** Use the steps in this procedure to capture logs for additional components.

#### Steps

- 1. Edit the **gcxi.properties** file.
- 2. Add the following parameters:

```
{MSTR LOG CONF EXT:=}
```

For example:

{MSTR\_LOG\_CONF\_EXT="Database Classes@@Connection Instances@Connection Management@Error@Info@SQL Trace"}

3. {MSTR LOG MAX BACKUP:=}

The value you enter here sets the **max\_backup** value in the **mstr\_log.xml** file. The default value is 2. This controls the maximum number of back-up files that MicroStrategy will store for this log.

For example:

```
{MSTR LOG MAX BACKUP:=3}
```

4. {MSTR LOG MAX SIZE:=}

The value you enter here sets the **max\_size** value in the **mstr\_log.xml file**. The default value is 2048 KB. This controls the maximum size that a log file can reach before MicroStrategy moves it to the backup location and creates a new file.

For example:

```
{MSTR_LOG_MAX_SIZE:=4096}
```

5. Deploy or redeploy Genesys CX Insights.

You can also configure logging by using the MSTR\_LOG\_XML variable to pass custom xml that explicitly overwrites the entire **mstr\_log.xml** file. For more information about this advanced feature, contact your Genesys representative.

# Procedure: Reset logging to default values

**Purpose:** Use the steps in this procedure to reset all logs to default settings:

#### Steps

- 1. Edit the **gcxi.properties** file.
- 2. Add the following parameter:

3. Deploy or redeploy Genesys CX Insights.

For more information about diagnostic logging in MicroStrategy, including the commands discussed above, see the MicroStrategy website, including:

- KB15868: How to modify diagnostics logging...
- Configuring What is Logged.
- Explanation of parameters given for logging locations.

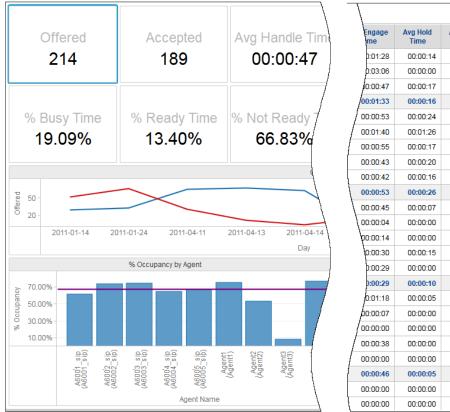
# Report descriptions

This page lists the historical reports and dashboards, organized by folder, that are included with Genesys Customer Experience Insights (Genesys CX Insights). This document is valid only for the 9.0.x releases of Genesys CX Insights, and is intended for on-premise deployments of Genesys CX Insights. If you have Genesys CX Insights in the Genesys Engage cloud, see the *Reporting in the cloud* guide.

To view a sample of the output from a report, follow the relevant link on the tabs below, then on the report description page, click 'Sample XXX Report.pdf'.

To view more detailed information about each report, including sample report output, click the report name.

# Reports and dashboards



	Data rows: 1 - 50 of 51 Data columns: 1 - 10 of				
Engage me	Avg Hold Time	Avg Wrap Time	Avg Consult Received Time	Avg Consult Received Wrap Time	
0:01:28	00:00:14	00:00:00	00:00:00	00:00:00	
0:03:06	00:00:00	00:00:00	00:00:00	00:00:00	
0:00:47	00:00:17	00:00:00	00:00:00	00:00:00	
00:01:33	00:00:16	00:00:00	00:00:00	00:00:00	
00:00:53	00:00:24	00:00:00	00:00:00	00:00:00	
00:01:40	00:01:26	00:00:00	00:00:00	00:00:00	
00:00:55	00:00:17	00:00:00	00:00:00	00:00:00	
00:00:43	00:00:20	00:00:00	00:00:00	00:00:00	
00:00:42	00:00:16	00:00:00	00:00:00	00:00:00	
00:00:53	00:00:26	00:00:00	00:00:00	00:00:00	
00:00:45	00:00:07	00:00:00	00:00:00	00:00:00	
00:00:04	00:00:00	00:00:00	00:00:06	00:00:00	
00:00:14	00:00:00	00:00:00	00:02:07	00:00:00	
0:00:30	00:00:15	00:00:00	00:03:04	00:00:00	
0:00:29	00:00:00	00:00:00	00:00:00	00:00:00	
0:00:29	00:00:10	00:00:00	00:01:21	00:00:00	
0:01:18	00:00:05	00:00:00	00:00:00	00:00:00	
0:00:07	00:00:00	00:00:00	00:00:00	00:00:00	
00:00:00	00:00:00	00:00:00	00:01:03	00:00:00	
00:00:38	00:00:00	00:00:00	00:00:39	00:00:00	
00:00:00	00:00:00	00:00:00	00:00:24	00:00:00	
00:00:46	00:00:05	00:00:00	00:00:45	00:00:00	
00:00:00	00:00:00	00:00:00	00:00:17	00:00:00	
00:00:00	00:00:00	00:00:00	00:00:11	00:00:00	

Reports and dashboards are found in the **Shared Reports** > **CX Insights** folder, and are organized into the following sub folders:

- Agents
- · Billing Data
- · Business Results
- Callback
- Chat
- · Chat Bot
- Co-browse
- · CX Insights for iWD
- Dashboards
- Designer
- Details
- Email
- Outbound Contact
- · Predictive Routing
- Queues

# Video: Navigate and find reports in GCXI

#### Link to video

This video describes how to navigate in Genesys CX Insights, and find relevant reports.

# The Agents folder

The **Agents** folder contains reports that enable you to gather various contact center statistics that pertain to monitored agents (configured as Person objects in Configuration Server) who process voice, chat, SMS, email, social media, and third-party-media type interactions:

#### Agent Conduct Report

Use this report to contrast agent interaction handling performance against the agent group performance, based on various metrics, including Accepted/Rejected, Responses, and Handle Time, Hold Time, Wrap Time, and whether a Consult was initiated.

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### Agent Details Activity Report

Use this report to view a chronological breakdown of agent activities, including times and duration of login sessions and status of agent devices / DNs, and relevant interaction states.

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#### Agent Group Business Attribute Report

Use this report to contrast agent group interaction handling activities against the revenue generated, based on Business Result, Customer Segment, and Service Type for each media type and interaction type. This report is stored in the Details folder.

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#### Agent Group Interaction Handling Report

Use this report to monitor the interaction processing performance of groups of agents over specific day ranges. The report displays information about Handle Time, Engage Time, Wrap Time, and various transfer initiation and acceptance metrics.

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### Agent Group Membership Details Report

Use this report to generate a detailed view of how agents are distributed among Agent Groups, including information about when each Agent entered and exited each group.

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### Agent Group Queue Business Attribute Report

Use this report to understand agent-activity results categorized by a wide range of attributes, including Agent Group, Business Result, Customer Segment, Interaction Type, Media Type, Queue, and Service Type.

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## Agent Interaction Hierarchy Report

Use this report to understand the hierarchy of interactions that were offered to agents, including the nature of the accepted interactions and responses (whether interactions were threaded, logical, or base).

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# Agent Interval Based Report

Use this report to view key performance indicators related to the agents, and thereby assess agent productivity.

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## Agent Login-Logout Details Report

Use this report to review the times when agents logged in and out and the duration of each login

session during a range of hours that you specify within a day. The report is stored within the Details folder.

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#### Agent Not Ready Report

Use this report to understand the reasons given for the time agents spent in a NotReady state.

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### Agent Not Ready Reason Code Report

Use this report to monitor the counts, durations, and percentages of calls that are made and received by an agent, while that agent's state is NotReady, during a range of hours that you specify within a particular day.

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#### Agent Omnichannel Activity Report

This report provides a breakdown of the duration of the different states that an agent can be in (Ready, Not Ready, Busy, and Other), across all media channels, fully accounting for the agent's interaction time (time spent handling interactions).

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#### Agent Outbound Campaign Report

Use this report to understand the success of your outbound campaigns, by reviewing total and average durations of call handling activities (including Handle Time, Wrap Time, Preview Time, Engage Time, and Hold Time) for each agent.

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#### Agent Queue Report

Use this report to understand agent interaction-processing on a queue-by-queue basis, based on Engage, Hold, and Wrap times and percentages.

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#### Agent Social Engagement Report

Use this report to view, for each agent and day, detailed information about average social media scores in each configured standard response, or category. The report includes averaged Sentiment, Influence, and Actionability scores.

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#### Agent State Details Report

Use this report for monitoring an agent's noncall-related activities, especially under those circumstances in which the agent is paid by the minute. The report is stored in the Details folder.

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#### Agent Summary Activity Report (Active)

Use this report to understand how much of agents' total active time was spent in each state, broken down by media type. The report breaks down agent time based on both the Active Time (the amount of active time) and the % Active Time (the percentage of active time) in each state.

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## Agent Summary Activity Report (Interaction)

Use this report to understand how much of agents' interaction time was spent in each state, broken down by media type.

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#### Agent Utilization Report

Use this report to understand how agents perform on a daily basis by analyzing interaction volumes, call times, and consult data.

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### Agent Wrap Report

Use this report to monitor the after-call work (wrap) call-related activities that agents (or agent groups) perform after processing calls.

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# Weekly Agent Group Performance Dashboard

Visualizations that illustrate weekly interaction handling at the group level.

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# Weekly Agent Group Utilization Dashboard

Visualizations you can use to understand how much of agent total active time was spent in each state.

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# The Billing Data folder

The **Billing Data** folder contains reports that provide statistics about your consumption of billable Genesys services.

#### IVR Usage Report

View information about Genesys Voice Platform (GVP) usage, as represented by daily and monthly totals of IVR Minutes and IVR Ports. This report is available in two versions: Daily and Monthly. If you have enabled the BDS metrics for GVP minutes or ports (gvp\_minutes and gvp\_ports), these reports provide summary information about Designer usage details tied to these metrics, over the indicated time period.

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#### Inbound Voice User Report

View information about Named and Concurrent Users Count usage. This report provides detailed information about the Named and Concurrent Users Count usage during the selected period. You can drill on the Named User metric to see the discrete users associated with the count.

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#### The Business Results folder

The **Business Results** folder contains reports that provide statistics that pertain to business results, customer segment, and service type/subtype business attributes:

#### **Business Metrics Executive Report**

Use this report to monitor contact center performance, particularly if you are outside of the immediate contact center, and to gauge service level within the perspective of the total number of interactions that were offered to resources, by day.

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## Customer Perspective Executive Report

Use this report to understand such key indicators as how much time elapsed before customers were connected to agents or received responses, how satisfied customers were with their transactions, and how much money they spent.

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# Interaction Volume Business Attribute Report

Use this report to understand the Business Result for interactions, to contrast that result against the Service Level and against callers' initial objective, and to understand outcomes in light of various interaction handling metrics.

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## Weekly Business Attribute Dashboard

Detailed information and visualizations illustrating how interactions that enter the contact center are categorized into the business-result attributes that are configured in your environment.

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#### The Callback folder

The **Callback** folder contains reports that provide information about callback usage, including information about success rates, scheduling, and wait times:

#### Callback Details Report

Use this report to view a detailed picture of how Callback is used in your contact center, including information about the volume of callback calls, success rates, resulting savings, and customer wait times.

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#### Callback Summary Report

Use this report to view a comprehensive picture of how Callback is used in your contact center, including detailed information about the volume of callback calls, success rates, resulting savings, and customer wait times.

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# The Chat folder

The **Chat** folder contains reports that provide detailed information about chat activities in the contact center.

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# Asynchronous Chat Dashboard

Use this dashboard to view detailed information about asynchronous chat sessions in the contact center. Asynchronous (Async) chat sessions are single chat sessions between a customer and a contact center that last for a long period of time (potentially several days). Agents can return a chat session back into the workflow (into a dormant state), and then reconnect to the session later.

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# Chat Message Statistics Report

Use this report to learn more about how chat is used in the contact center.

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#### **Chat Termination Report**

Use this report to learn more about how chat calls that terminated.

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#### Interaction Acceptance Dashboard

Use this dashboard to understand how long it takes for agents to accept customer interactions, and to identify what percentage of interactions are accepted promptly, or with some delay.

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### Interaction Acceptance Report

Use this report to view statistics about the acceptance of interactions by agents, including the amount of time it takes for agent to accept interactions, and the number and percentage of interactions that were accepted quickly, or with a delay.

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#### **Pre-Agent Termination Report**

Use this report to learn more about calls that terminated before connecting to an agent.

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## The Chat bot folder

Reports in the **Chat Bot** folder are ready-to-use, but as always, can be modified to suit your specific business needs.

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#### Bot Dashboard

The Bot Dashboard provides a dashboard-style summary that you can use to evaluate the impact of Chat Bot, including visualizations of session and message volumes, and breaks down sessions based on whether bots, agents, or both, were involved.

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## The Co-browse folder

The **Co-browse** folder contains reports you can use to learn more about agent handling of contact center interactions involving Co-browse sessions.

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#### Co-browse Detail Report

Use this report to view segment-related details pertaining to agent handling of contact center

interactions that include Co-browse sessions. The report provides detailed information about Co-browse sessions, including durations, browsing modes, and pages visited.

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#### Co-browse Summary Report

Use this report to learn how each agent handles interactions involving Co-browse sessions, by contrasting Co-browse session counts, session durations, and the percentage of interactions that include Co-browse.

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# The CX Insights for iWD folder

The **CX Insights for iWD** folder contains reports that provide information about contact center interactions involving Genesys Info Mart and intelligent Workload Distribution (iWD).

### Capture Point Business Value Report

Use this report to understand the distribution of tasks by process and point of entry (capture point) into the iWD system, and thereby assess whether the time to complete tasks correlates with the desired business value and time to complete for a busy enterprise, which can help you to better tune priority schema and priority levels for processes, capture points and departments.

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## Capture Point Dashboard

Use this dashboard to understand the business value driven through capture points, and the volume of work processed through each capture point. The dashboard breaks down the overall average duration time that is spent to complete tasks (from inception within the presource system to termination within iWD) into average task durations at defined milestones along a task's routed path for each capture point. The dashboard also displays the business value range into which the tasks fall, the average time that it took to complete the tasks, and plots the total number of finished tasks against their assigned business value range.

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## Capture Point Task Duration Report

Use this report to identify and plan remediation for bottlenecks in the system. The technical business user can then tune routing strategies and associated business rules in order to reduce bottlenecks and routing milestones. This is particularly useful if you base distribution strategies or business operations around the point (the capture point) through which tasks enter the iWD system.

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## Customer Segment Service Level Report

Use this report to learn more about the number of new tasks, number of completed tasks and percentage of all tasks that were completed during the reporting interval, by day, by customer

segment, and by business process.

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#### Customer Segment Service Level Dashboard

Use this dashboard to learn more about the fulfillment of Service Level Agreements, by exploring the percentage of tasks that were completed during a specified interval. The dashboard illustrates the handling volumes by customer segment and business process, allowing you to compare achievements against your business objectives with a focus on each customer segment's progress over time.

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#### ETL Audit Dashboard

Use this dashboard to view a historical overview of iWD Datamart job execution statistics, including duration and status, and to explore other, more detailed information from the ETL\_AUDIT table.

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#### Intraday Process Dashboard

Use this dashboard to see an intraday overview of the completed iWD tasks that were overdue, along with the counts, percentages, and averages of completed iWD tasks, breaking down the average amount of time it took to complete tasks using three key metrics: Avg Finish Time — measuring the average time it took for tasks to be completed after entering the system, Avg Accept Time — measuring the average amount of time that tasks were backlogged before they reached a handling resource, and Avg Handle Time — measuring the average amount of time that resources worked on tasks. The dashboard also provides an overview of the task backlog for a day or reporting interval, providing summary information about how many tasks are pending, how many tasks are overdue, and how many of the completed tasks were overdue. Data is organized by day, tenant, department, and business process.

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## Intraday Process Report

Use this report to view information about the performance of historical and pending work items, to learn more about sources of backlog, about throughput, and to understand how often tasks become overdue before they are finished.

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## Queue Duration and Priority Dashboard

Use this dashboard to track tasks from inception within the presource system, through to completion within iWD, and gain insight into average task durations at defined milestones along a task's distribution path. The dashboard also allows you to analyse tasks based on ranges of queue priorities and, various processing milestones from which tasks were distributed or proceeded through prior to completion.

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## Queue Priority Range Report

Use this report to tune the priorities in the rules system and routing strategies in order to reduce average durations at processing milestones. This report is particularly useful if you manage your operations around service level-based or business outcome-based priorities.

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#### Queue Throughput Report

Use this report to examine a holistic view of tasks in queues (New, Cancel, Rejected, Completed, etc). You can view tasks by processes within departments to analyze how tasks pass through business process steps associated with queues in a given time interval.

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#### Queue Task Duration Report

Use this report to gain insight into the movement of tasks through the iWD system, thereby troubleshooting business rules and routing strategies.

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#### Resource Performance Dashboard

Use this dashboard to quickly identify which day of the month, department, and process is occupying resource time.

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## Resource Performance Report

Use this report to understand how resources handle tasks over specific time periods. Gaining insights and the variability of performance for each process, department, and days the resource worked.

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# Task Age Dashboard

Use this dashboard to better understand how well each department and process is meeting Service Level Agreements. The dashboard provides detailed information about the volume of tasks that are handled within the defined Service Level interval, and the volume that breach the Service Level Agreement for departments and processes.

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# Task Age Report

Use this report to better understand how well each department and process is meeting Service Level Agreements. This report provides detailed information about the volume of tasks that are handled within the defined Service Level interval, and the volume that breach the Service Level Agreement for departments and processes.

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#### Task Detail Report

Use this report to understand the raw details of individual work items when viewed from the customer perspective. Many filters are provided to facilitate troubleshooting, identification, and validation of the results.

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#### Task Work Detail Report

Use this report to understand the employees who helped solve a task where the task involved more than one employee, the names of the gueues that distributed the tasks to the employees and more

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#### The Dashboards folder

The **Dashboards** folder contains out-of-box dashboards, each of which collects two or more quasirelated GCXI reports into visual summaries using charts, graphs, other diagrammatic devices.

#### ANI Details Dashboard

Provides detailed information about the outcomes of customer interactions, based on Automatic Number Identification (ANI), enabling you to identify frequent callers and the result of their interactions.

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#### Agent Performance Dashboard

Use this dashboard to view detailed information about agent activity in the contact center, including information about handle time, interaction volume, and relative ranking compared to other agents.

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## Bot Analytical Dashboard

Use this dashboard to learn more about bot activity, and how bots can help you improve customer experience with Genesys Designer.

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#### Contact Center Dashboard

Use this dashboard to view detailed information about interaction volumes and KPIs for the whole contact center.

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#### Final Disposition Dashboard

Use this dashboard to analyze trends in interaction outcomes by viewing detailed information over

time periods you specify, about the number and percentage of interactions that enter the Designer Application and conclude in the Self-Service phase, compared to the number that enter the Assisted-Service phase and are routed to a DN or agent.

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## Milestone Path Analysis Dashboard

Provides detailed information and visualizations illustrating the first and last milestones customers traversed, and the number of sessions that ended in each final disposition.

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#### Queue Dashboard

Use this dashboard to compare the performance of queues by viewing detailed information about agent performance on a queue-by-queue basis.

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#### **TransferDashboard**

A dashboard-style summary that you can use to track a wide variety of metrics related to transfers, consult, and conference calls.

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#### Supervisor Dashboard

Use this dashboard to evaluate interaction handling and agent performance at a glance. It includes both key information about interaction volume and customer experience, and charts to illustrate each agent's activity during the reporting period.

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## Weekly Agent Group Performance Dashboard

Visualizations that illustrate weekly interaction handling at the group level.

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## Weekly Agent Group Utilization Dashboard

Visualizations you can use to understand how much of agent total active time was spent in each state.

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### Weekly Business Attribute Dashboard

Detailed information and visualizations illustrating how interactions that enter the contact center are categorized into the business-result attributes that are configured in your environment.

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### Weekly Queue Summary Dashboard

Visualizations that help you assess the weekly performance of configured queues, to understand what percentage of interactions in each queue were accepted within the defined service level, to detect high rates of abandonment, and to compare the performance of each queue in handling interactions.

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#### Weekly Self Service Containment Dashboard

Detailed information and visualizations that you can use to learn about the number and percentage of interactions that enter each Designer Application and conclude in the Self-Service phase, compared to the number that enter the Assisted-Service phase and are routed to a DN or agent.

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## The Designer folder

The **Designer** folder contains reports that provide information about user experiences in self-service and assisted-service Interactive Voice Response (IVR) / Genesys Designer application sessions.

## **Activity Summary Report**

Use this report to view summary information about activities in Designer applications, including the number of activities within a given time period, and the number and percentage of those activities that were complete or incomplete.

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## **Application Duration Report**

Use this report to learn more about Designer application session durations, either for full sessions, or separately for self-service and assisted-service.

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## **Application Summary Report**

Use this report to learn more about the final outcome of IVR Designer application sessions.

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## Assisted Service Interactions by Last Milestone Report

Use this report to learn more about calls that move from Self-Service into Assisted Service. Interactions are included in this report based on the last milestone where the interaction was routed to assisted service.

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### **Blocks Summary Report**

Use this report to learn more about the traffic in each block, and to assess the rate and type of errors in each block.

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### Bot Analytical Dashboard

Use this dashboard to learn more about bot activity, and how bots can help you improve customer experience with Genesys Designer.

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### Final Disposition Dashboard

Use this dashboard to analyze trends in interaction outcomes by viewing detailed information over time periods you specify, about the number and percentage of interactions that enter the Designer Application and conclude in the Self-Service phase, compared to the number that enter the Assisted-Service phase and are routed to a DN or agent.

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### Milestone Summary Report

Use this report to learn more about the frequency with which each milestone is hit, and the dispositions for calls that contained each milestone.

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## Self-Service Statistics Report

Use this report to learn about the number and percentage of interactions that enter the Designer Application and and concluded in the Self-Service phase, compared to the number that enter the Assisted-Service phase and are routed to a DN or agent.

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## Survey Answer Report

Use this report to learn more about how customers answer post-call survey questions, including the number and percentage of times that each answer was selected, organized by application, agent group, question, or answer, over various time-periods.

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## Survey Statistics Report

Use this report to learn more about post-call surveys, such as how many surveys were offered, accepted, or not accepted, and how many No Input and No Match errors were generated.

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## Weekly Self Service Containment Dashboard

Detailed information and visualizations that you can use to learn about the number and percentage

of interactions that enter each Designer Application and conclude in the Self-Service phase, compared to the number that enter the Assisted-Service phase and are routed to a DN or agent.

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#### The Details folder

The **Details** folder contains reports that provide detailed information about low-level interactions and agent.

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#### Agent Details Activity Report

Use this report to understand the activities of particular agents over time, including login, status, and interaction details.

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### Agent Group Membership Details Report

Use this report to generate a detailed view of how agents are distributed among Agent Groups, including information about when each Agent entered and exited each group.

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### Agent Login-Logout Details Report

Use this report to view detailed information about the start times, end times, and durations of agent login sessions.

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## Agent State Details Report

Use this report to understand how agents use their noncall time, and understand the reasons given for various agent states.

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## Interaction Handling Attempt Report

Use this report to analyze detailed information about how much time interactions spend in each stage of their progorss through the contact center.

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## The Email folder

The **Email** folder contains reports you can use to learn more about email interaction volumes, statistics, and outcomes in your contact center. Reports in the Email folder are ready-to-use, but as always, can be modified to suit your specific business needs.

## Agent Summary Activity Email Report

Use this report to view detailed information about how each agent's active time was used when handling email interactions.

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#### Agent Utilization Email Report

Use this report to view detailed information about how each agent's active time was used when handling email interactions.

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#### Interaction Volume Business Attribute Email Report

Use this report to understand the Business Result for interactions, to contrast that result against the Service Level and against callers' initial objective, and to understand outcomes in light of various interaction handling metrics.

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#### The Outbound Contact folder

The **Outbound Contact** folder contains reports that provide information about the progress of outbound campaigns, including summaries of campaign activity, campaign callbacks, and contact list performance:

#### Campaign Callbacks Summary Report

Use this report to understand the frequency with which Callback was used in your Outbound campaigns, and the overall Callback success rates.

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#### Campaign Summary Report

Use this report to understand the disposition of Outbound campaign contact dialing attempts; whether calls connected, were dropped, or failed (together with the reason for failure).

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## Contact List Effectiveness Report

Use this report to determine which calling lists are working efficiently, and which need to be adjusted. The report contrasts, for each list, the number of outbound call attempts to the number of times the call failed to connect (a SIT tone was detected).

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## The Predictive Routing folder

The **Predictive Routing** folder contains reports and dashboards that enable you to learn more about how Genesys Predictive Routing (GPR) is used in your contact center, including information about how it impacts customer experience, wait times, issue resolution rates, and other key metrics.

#### Predictive Routing AHT & Queue Dashboard

The Predictive Routing - AHT & Queue Dashboard provides a dashboard-style summary that you can use to evaluate the impact on contact center efficiency of enabling Genesys Predictive Routing (GPR).

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#### Predictive Routing Model Efficiency Dashboard

The Predictive Routing — Model Efficiency Dashboard provides a bubble-graph summary that you can use to evaluate the impact on contact center efficiency of enabling Genesys Predictive Routing (GPR), and compare the effectiveness of various GPR prediction models.

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## Predictive Routing A/B Testing Report

Use the Predictive Routing A/B Testing Report to track A/B testing results for predictive models and predictors. This report includes a First Contact Resolution Rate calculation, which allows you to quickly see how often customer concerns were resolved on the first attempt, and allows you to contrast interactions that were processed when Predictive Routing was switched ON compared to when it was OFF. The report also profiles response time, engage time, wrap time, and other relevant Key Performance Indicators (KPI).

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## Predictive Routing Agent Occupancy Dashboard

The Predictive Routing Agent Occupancy Dashboard provides a summary that you can use to evaluate the impact on contact center efficiency of enabling Genesys Predictive Routing (GPR).

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## Predictive Routing Detail Report

Use the Predictive Routing Detail Report to view detailed interaction-level data about how Genesys Predictive Routing (GPR) is used in your contact center, and to understand how it impacts Key Performance Indicators (KPI), including detailed metrics that profile agent scoring, and allow you to compare different models or predictors.

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## Predictive Routing Operational Report

Use the Predictive Routing Operational Report to track key Genesys Predictive Routing (GPR) operational statistics, including the number of interactions Offered and Accepted, and measures that indicate how long interactions waited to be scored, and how long they waited in queue.

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#### Predictive Routing Queue Statistics Report

Use the Predictive Routing Queue Statistics Report to track KPIs for each Queue when Genesys Predictive Routing (GPR) is used to optimize routing. The report allows you to monitor overall interaction-processing performance of queues, including contrasting, for each Model and Predictor, the number of Offered and Accepted interactions, Accept, Handle, and Engage Time, as well as abandoned and service level measures.

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## The Queues folder

The **Queues** folder contains reports that enable you to gather data that pertains to interaction flows through monitored ACD queue, virtual-queue, interaction queue, workbin, and queue-group objects:

#### Abandon Delay Report

Use this report to evaluate the number and percentage of interactions that were abandoned (or disconnected) while queued at a specific queue, and the percentage abandoned by service time interval.

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### Interaction Traffic Group Report

Use this report to better understand the efficiency of interaction handling in each queue group, at a high level, including summaries of interactions offered, accepted, and abandoned, and the average times to accept or abandon.

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## Interaction Traffic Report

Use his report to evaluate the efficiency of queues by assessing the volume of interactions accepted in a given period, along with the average speed of answer (Avg Accept Time), maximum delays experienced before acceptance (Max Accept Time), and abandonment (Max Abandoned Waiting Time) from the perspective of the mediation DN.

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## Queue Outline Report

Use this report to see the interrelation of various queue-related metrics relevant to customer and consult interactions, and to understand how the metrics contribute to the sum total of all interactions that entered a queue resource.

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#### Queue Summary Report

Use this report to assess the performance of configured queues, to understand what percentage of interactions in each queue were accepted within the defined service level, and to compare the performance of each queue in handling interactions.

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## Speed Of Accept (Hours) Report

Use this report to understand how long interactions (such as email or other media types with slower response times) waited in queue before being accepted.

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### Speed Of Accept (seconds) Report

Use this report to understand how brief interactions (such as voice and chat — media types with faster response times) waited in queue before being accepted.

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## Weekly Queue Summary Dashboard

Visualizations that help you assess the weekly performance of configured queues, to understand what percentage of interactions in each queue were accepted within the defined service level, to detect high rates of abandonment, and to compare the performance of each queue in handling interactions.

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# Agents reports

This page describes reports you can use to learn more about the performance of agents in your contact center. The reports in the **Agents** folder are ready-to-use, but as always, can be modified to suit your specific business needs.

#### Tip

Interactions pertaining to an agent are attributed to each group of which the agent is a member. So, in scenarios where an agent is a member of more than one agent group, interactions are counted against each group, and can therefore appear more than once in historical reports. Similarly, interactions that are attributed to queues that are members of more than one queue group are reported against both queue groups.

## About Agents reports



The following reports are available in the **CX Insights** > **Agents** folder:

- Agent Conduct Report
- Agent Details Activity Report
- · Agent Group Business Attribute Report

- Agent Group Interaction Handling Report
- Agent Group Membership Details Report
- Agent Group Queue Business Attribute Report
- Agent Interaction Hierarchy Report
- Agent Interval Based Report
- Agent Login-Logout Details Report
- Agent Not Ready Report
- Agent Not Ready Reason Code Report
- · Agent Omnichannel Activity Report
- Agent Outbound Campaign Report
- Agent Queue Report
- Agent Social Engagement Report
- Agent State Details Report
- Agent Summary Activity Report (Active)
- Agent Summary Activity Report (Interaction)
- Agent Utilization Report
- Agent Wrap Report
- Weekly Agent Group Performance Dashboard
- Weekly Agent Group Utilization Dashboard

#### **Related Topics:**

- Go back to the complete list of available reports.
- Learn how to understand and use reports.
- · Learn how to create or customize reports.

# Agent Conduct Report

This page describes how you can use the (**Agents** folder) Agent Conduct Report to learn more about agent performance, including detailed call handling information for each agent.

# Understanding the Agent Conduct Report

											Ager	nt Conduc	t Report
Tenant		t	Media Type		Agent Name		Interaction Type		Hour	Accepted	Responses	Consult Initiate	
							Internal		2016-10-17 15	1	1	{	
					, Ag	, Agnt1 (Agnt1)		Total			1	1	
			Voice				Outbou			2016-10-17 15	1	1	
Envir	onme	ent			410	0 4100 (/			nd	2016-10-17 16	1	1	0
_						4100, 4100 (4100)				2016-10-17 18	1	1	ø
16	ent	Cor	nduct	Repo	ort								
Туе	d F	Resp	onses	Cons Initia		Short		ndoned riting	Rejected	Agent Disconnect First	Avg Hold Time (Fmt)	Avg Handle Time (Fmt)	Avg Wrap Time (Fmt)
	1		1		0	0		0	0	0	00:00:00	00:00:00	00:00:00
	1		1		0	0		0	0	0	00:00:00	00:00:00	00:00:00
	1		1		0	1		0	0	0	00:00:00	00:00:05	00:00:00
	1		1		0	1		0	0	0	00:00:00	00:00:05	00:00:00
	1		1		0	1		0	0	0	00:00:00	00:00:05	00:00:00
	3		3		0	3		0	0	0	00:00:00	00:00:05	00:00:00
	4		4		0	3		0	0	0	00:00:00	00:00:04	00:00:00
	4		4		0	3		0	0	0	00:00:00	00:00:04	00:00:00

This report describes agent performance in handling interactions, focusing on metrics that demonstrate the possible mishandling of interactions a high number of unaccepted interactions, excessive hold and aftercall work (wrap) times, and shorter-than-usual engage (talk) durations with

customers. It compares the number of interactions that were abandoned while alerting at the agent's DN to the number of interactions that fall within the shorttalk threshold, and the number of interactions that were rerouted from the agent's DN because the agent did not accept them. These metrics provide relative performance and should be analyzed carefully before conclusions are drawn or corrective action is taken.

You can Drill Up / Drill Down on the following metrics:

- Agent Group-Agent
- Ixn Type-Ixn Subtype
- H-D-M-Q-Y

To get a better idea of what this report looks like, view sample output from the report: SampleAgentConductReport.pdf

The following tables explain the prompts you can select when you generate the report, and the metrics and attributes that are represented in the report:

## Prompts in the Agent Conduct Report

Prompt	Description
Pre-set Day Filter	Choose from the convenient list of predefined rolling time ranges, spanning one day or more, over which to run the report.
Report Date	Choose a day for which to run the report.
From Hour	The first hour* to include in the report.
To Hour	The last hour* to include in the report.

\*For both From Hour and To Hour:

- 0 represents the first hour, from 12:00:00 AM to 12:59:59 AM.
- 1 represents the second hour, from 01:00:00 AM to 01:59:59 AM.

. . .

- 23 represents the twenty-fourth hour, from 23:00:00 AM to 11:59:59 PM.
- 24 also represents the twenty-fourth hour, from 23:00:00 AM to 11:59:59 PM

Agent Group	Optionally, select one or more groups from which to gather data for the report.
Agent	Optionally, select one or more agents from which to gather data for the report.
Media Type	Optionally, select the type of media to include in the report—for example, VOICE, EMAIL, and CHAT.
Interaction Type	Optionally, select the type of interaction to include in the report—for example, Inbound, Outbound, and Internal.

Prompt	Description
Tenant	For multi-tenant environments, optionally select the tenant(s) for which to include data in the report.

# Attributes in the Agent Conduct Report

Attribute	Description	Data Mart Table.Column
Tenant	This attribute enables data within the reporting interval to be organized by tenant.	TENANT.TENANT_NAME
Media Type	This attribute enables data to be organized by the interaction's media type—for example, VOICE, EMAIL, and CHAT.	MEDIA_TYPE.MEDIA_NAME
Agent Name	This attribute enables data to be organized by certain attributes of the agent who is associated with the interaction.	RESOURCE_GI2.AGENT_NAME
Interaction Type	This attribute enables data to be organized by the interaction's type—for example, Inbound, Outbound, and Internal.	INTERACTION_TYPE_GI2.INTERACTI
Hour	This attribute enables data within the reporting interval to be organized by a particular hour within a day. Hour values are presented in YYYY-MM-DD-HH24 format.	FORECAST_DATE_TIME.LABEL_YYYY DATE_TIME.LABEL_YYYY_MM_DD_H

# Metrics in the Agent Conduct Report

Metric	Description	Source or Calculation
Accepted	The total number of times that customer interactions or warm consultations were accepted, answered, pulled, or initiated by this agent.	AG2_AGENT_[*].ACCEPTED
Responses	For voice and chat media, this metric represents the total number of times that customer interactions or warm consultations were accepted by this agent. For email, this metric represents the total number of times that the agent prepared an	AG2_AGENT_[*].RESPONSES

Metric	Description	Source or Calculation
	outbound reply.  Note: For voice media, this metric is identical to Activity\Accepted; it returns positive values when agents initiate calls.	
Consult Initiated	The total number of times that this agent initiated requests for collaboration or simple consultation, where the collaborations/consultations were established and associated with customer interactions.	AG2_AGENT_[*].CONSULT_INITIATED
Short	The total number of times that customer interactions were accepted by this agent and then released, transferred, or stopped within the short-engagement threshold.  This metric relies on the value of the short-engagement (short-talk) option as configured in the [agg-gim-thld-AGENT-IXN] section.	AG2_AGENT_[*].SHORT
Abandoned Inviting	The total number of interactions of this business attribute that were abandoned or dropped for any reason while they were alerting/ringing at the first handling resource. This count includes short-abandoned interactions.	AG2_AGENT_[*].ABANDONED_INVITE
Rejected	The total number of times that customer interactions alerted at this agent and were not accepted.	AG2_AGENT_[*].REJECTED
Agent Disconnect First	For voice interactions, the total number of times during the reporting interval that this agent released customer interactions before the other party did. For multimedia interactions, serves as a flag to indicate whether the interaction was stopped by one of the parties or by some outside entity (for example, Interaction Server or a Media Server).  The value represented by this metric is incremented only when the system (such as the switch) provides such information.	AG2_AGENT_[*].AGENT_DISCONNECT_FIRST
Avg Hold Time (Fmt)	The average amount of time (HH:MM:SS) that this agent had customer interactions on hold.	Calculated based on the Hold and Hold Time Activity metrics.

Metric	Description	Source or Calculation
	This metric is attributed to the interval in which interactions arrived at the agent (which can differ from the interval in which the interactions were placed on hold).	
Avg Handle Time (Fmt)	Agent Attribute: The average amount of time (HH:MM:SS) that this agent spent handling interactions that the agent received.  This metric is computed as handle time divided by the sum of accepted interactions and received consultations.	Calculated based on the Handle Time, Accepted, and Consult Received Accepted Activity metrics.
Avg Wrap Time (Fmt)	The average amount of time (HH:MM:SS) that this agent spent on customer interactions while in ACW (Wrap) state.	Calculated based on the Wrap Time and Wrap Activity metrics.

# Agent Details Activity Report

This page describes how you can use the (**Agents** folder and **Details** folder) Agent Details Activity Report to learn more about specific agents.

## Understanding the Agent Details Activity Report

					Ag	ent Details Activ	vity Report										
Tenant	Media Type	Session Key	Active Flag	Start Timestamp Sess	End Timestamp Sess	Start Timestamp State	End Timestamp State	Interaction Type	State Name	Active Time (Fmt)	Duration	Additional Info					
		3	0	1/14/2011 12:30:45 PM	1/14/2011 12:30:48 PM	1/14/2011 12:30:45 PM	1/14/2011 12:30:48 PM		NotReady	00:00:03	3	Reason Code: NO REASON					
						1/14/2011 12:36:51 PM	1/14/2011 12:37:17 PM		NotReady	00:10:45	26	Reason Code: NO REASON					
						1/14/2011 12:37:17 PM	1/14/2011 12:37:18 PM		Ready	00:10:45	1	Reason Code: RC_soft=8					
						1/14/2011 12:37:18 PM	1/14/2011 12:37:21 PM	Inbound	INBOUND Receiver Alert	00:10:45	3	Ixn ID: 1					
							1/14/2011 12:37:36 PM		Busy	00:10:45	18	Reason Code: NO REASOI					
						1/14/2011 12:37:21 PM	1/14/2011 12:37:25 PM	Inbound	INBOUND Receiver Connect	00:10:45	4	Ixn ID: 1					
						1/14/2011 12:37:25 PM	1/14/2011 12:37:28 PM	Inbound	INBOUND Receiver Hold	00:10:45	3	Ixn ID: 1					
						1/14/2011 12:37:28 PM	1/14/2011 12:37:32 PM	Inbound	INBOUND Receiver Connect	00:10:45	4	Ixn ID: 1					
											1/14/2011 12:37:32 PM	1/14/2011 12:37:34 PM	Inbound	INBOUND Receiver Hold	00:10:45	2	Ixn ID:
		5	0	1/14/2011 12:36:51 PM	1/14/2011 12:47:36 PM	1/14/2011 12:37:34 PM	1/14/2011 12:37:36 PM	Inbound	INBOUND Receiver Connect	00:10:45	2	Ixn ID:					
		-				1/14/2011 12:37:36 PM	1/14/2011 12:37:41 PM		Ready	00:10:45	5	Reason Code: RC_soft=89					
						1/14/2011 12:37:41 PM	1/14/2011 12:39:24 PM		NotReady	00:10:45	103	Reason Code: RC_soft=89					
nvironmen	Voice						1/14/2011 12:39:24 PM		Ready	00:10:45	0	Reason Code: RC_soft=89					
	voice					1/14/2011 12:39:24 PM	1/14/2011 12:39:28 PM	Inbound	INBOUND Receiver Alert	00:10:45	4	Ixn ID: 3					
									Busy	00:10:45	4	Reason Code: NO REASON					
						1/14/2011 12:39:28 PM	1/14/2011 12:39:36 PM		Ready	00:10:45	8	Reason Code: RC_soft=89					
										00:10:45	45	_ lxp.ipo					

This report provides a chronological breakdown of the activities of one agent over a period of time that you specify including:

- The timestamp and duration of the agent's active (login) session.
- The collective status of the agent's devices or DNs (for example, Ready, NotReady, or Busy), when each status began for that DN, and its duration.
- The interaction state when it was offered to or being processed by the agent.

The Agent Summary Activity Reports complement this report by summarizing the durations of agent sessions, agent states, and interaction states over one day.

For those rows related to agent status, the Additional Information column provides the reason code selected for why the agent was in a particular state—if software and/or hardware reason codes are configured within your environment.

To get a better idea of what this report looks like, view sample output from the report:

## SampleAgentDetailsActivityReport.pdf

The following tables explain the prompts you can select when you generate the report, and the metrics and attributes that are represented in the report:

## Prompts for the Agent Details Activity Report

Prompt	Description
Pre-set Day Filter	Choose from the convenient list of predefined rolling time ranges, spanning one day or more, over which to run the report.
Start Time	Choose the first day and time from which to gather report data.
End Time	Choose the last day and time from which to gather report data.
Single Agent (Required)	Select one or more agents from which to gather data for the report.
Media Type	Optionally, select the type of media to include in the report—for example, VOICE, EMAIL, and CHAT.
Interaction Type	Optionally, select the type of interaction to include in the report—for example, Inbound, Outbound, and Internal.
Tenant	For multi-tenant environments, optionally select the tenant(s) for which to include data in the report.

## Attributes used in the Agent Details Activity Report

Attribute	Description
Tenant	This attribute enables data within the reporting interval to be organized by tenant.
Media Type	This attribute enables data to be organized by the interaction's media type—for example, VOICE, EMAIL, and CHAT.
Session Key	This attribute enables data to be organized by the agent's active session for a particular media type.
Start Timestamp Sess	This attribute enables data to be organized by the calendar date and time when the agent session began.
End Timestamp Sess	This attribute enables data to be organized by the calendar date and time when the agent session ended. If the agent has not logged out, the value of this attribute is NULL.
Start Timestamp State	This attribute enables data to be organized by the

Attribute	Description			
	calendar date and time when the agent entered a specific state.			
End Timestamp State	This attribute enables data to be organized by the calendar date and time when the agent state ended.			
Interaction Type	This attribute enables data to be organized by the interaction's type—for example, Inbound, Outbound, and Internal.			
State Name	This attribute enables data to be organized by the state, such as UNKNOWN, NOTREADY, READY, BUSY, or INBOUND.			

## Metrics used in the Agent Details Activity Report

Metric	Description
Active Time (Fmt)	The total amount of time, in seconds, between the beginning and end of this agent's login session(s) on a particular media channel, irrespective of the intervals in which the resource session occurs. If an agent logs into multiple DNs, login duration is measured from the moment at which the agent logs in to the first DN to the moment at which the agent is no longer logged in to any DN. If the agent's session was still active when the data was compiled, the agent's session duration appears as null in the reports.  If the agent is not forcibly logged out when the calendar dates ends, login duration is split over both days.
Duration	The difference, in seconds, between the beginning and end of the agent's interaction-related state.
Additional Info	This attribute enables data to be organized by the primary key of the INTERACTION_FACT table. For voice interactions, the Interaction ID is the call's connection ID, which is assigned by the telephony server. This ID remains unchanged for as long as the telephony server processes the interaction. For multimedia interactions originating from an Interaction Server, this value is the assigned Interaction ID.

Because of the volume of data that this report could potentially generate, Genesys recommends that you restrict the start and end dates to the narrowest range that satisfies your report criteria. The default date selections span one day, and the Single Agent prompt is required.

Because this report weaves in the results from several Info Mart FACT tables to recount the story of the agent's activities, some of the report's records hold null values for columns that do not apply. For example, interaction types do not apply to agent status; therefore, no values will appear under the Interaction Type column for agent-state (or agent-session) records.

Many column headers in this report are generated from variables.

Data pertaining to interaction states is pulled directly from the Info Mart database. Refer to **The SM\_RES\_STATE\_FACT Table** section in the *Genesys Info Mart User's Guide* for special considerations regarding very short duration (>0 and <1 sec) states.

# Agent Group Business Attribute Report

This page describes how you can use the (**Agents** folder) Agent Group Business Attribute Report to compare agent group interaction handling activities against the revenue generated by each group.

## Understanding the Agent Group Business Attribute Report

											Agent	Grou	p Bu	sine	1	
Tenant	Media Type	Ag	Agent Group		Business Result		Customer Segment		s	ervice Type	Interaction Type	e Day	Accepte	d Respons	S	
									2016-05-2	5		4	1			
							Chat_CS		Chat_S	Т	Inbound	2016-06-0	1	1		
	įr	ness	Attri	bute	Repo	rt						0046060				
	Re	esponses	Handle Time (Fmt)	Avg Handle Time (Fmt)	Engage Time (Fmt)	Avg Engage Time (Fmt)	Hold Time (Fmt)	Avg Hold Time (Fmt)	Consult Received Accepted	Consult Received Time (Fmt)	Avg Consult Received Time (Fmt)	Wrap Time (Fmt)	Avg Wrap Time (Fmt)	Transfer Initiated Agent	% Transfer Initiated	Revenue
		4	00:23:41	00:05:55	00:23:41	00:05:55	00:00:00	00:00:00	0	00:00:00	00:00:00	00:00:00	00:00:00	0	0.00%	0
		1	00:00:11	00:00:11	00:00:11	00:00:11	00:00:00	00:00:00	0	00:00:00	00:00:00	00:00:00	00:00:00	0	0.00%	0
		1	00:00:59	00:00:59	00:00:59	00:00:59	00:00:00	00:00:00	0	00:00:00	00:00:00	00:00:00	00:00:00	1	100.00%	0
		1	00:00:13	00:00:13	00:00:13	00:00:13	00:00:00	00:00:00	0	00:00:00	00:00:00	00:00:00	00:00:00	0	0.00%	0
		5	00:21:36	00:04:19	00:21:36	00:04:19	00:00:00	00:00:00	0	00:00:00	00:00:00	00:00:00	00:00:00	1	20.00%	0
		1	00:16:34	00:16:34	00:16:34	00:16:34	00:00:00	00:00:00	0	00:00:00	00:00:00	00:00:00	00:00:00	0	0.00%	0
		1	00:07:43	00:07:43	00:07:43	00:07:43	00:00:00	00:00:00	0	00:00:00	00:00:00	00:00:00	00:00:00	0	0.00%	0
	1	14	01:10:57	00:05:04	01:10:57	00:05:04	00:00:00	00:00:00	0	00:00:00	00:00:00	00:00:00	00:00:00	2	14.29%	0
		4	00:23:41	00:05:55	00:23:41	00:05:55	00:00:00	00:00:00	0	00:00:00	00:00:00	00:00:00	00:00:00	0	0.00%	0
		1	00:00:11	00:00:11	00:00:11	00:00:11	00:00:00	00:00:00	0	00:00:00	00:00:00	00:00:00	00:00:00	0	0.00%	0
		1	00:00:13	00:00:13	00:00:13	00:00:13	00:00:00	00:00:00	0	00:00:00	00:00:00	00:00:00	00:00:00	0	0.00%	0
	/	1	00:16:34	00:16:34	00:16:34	00:16:34	00:00:00	00:00:00	0	00:00:00	00:00:00	00:00:00	00:00:00	0	0.00%	0
		7	00:40:39	00:05:48	00:40:39	00:05:48	00:00:00	00:00:00	0	00:00:00	00:00:00	00:00:00	00:00:00	0	0.00%	0
		4	00:23:41	00:05:55	00:23:41	00:05:55	00:00:00	00:00:00	0	00:00:00	00:00:00	00:00:00	00:00:00	0	0.00%	0
		1	00:00:11	00:00:11	00:00:11	00:00:11	00:00:00	00:00:00	0	00:00:00	00:00:00	00:00:00	00:00:00	0	0.00%	0
		1	00:00:13	00:00:13	00:00:13	00:00:13	00:00:00	00:00:00	0	00:00:00	00:00:00	00:00:00	00:00:00	0	0.00%	0
	\					00:16:34	00:00:00	00:00:00						0	0.00%	

This report contrasts each agent group's collective interaction handling activities against the revenue generated, based on Business Result, Customer Segment, and Service Type for each media type (such as voice, chat) and interaction type (such as inbound, internal).

Use this report to contrast agent group interaction handling activities against the revenue generated, based on Business Result, Customer Segment, and Service Type for each media type and interaction type.

To get a better idea of what this report looks like, view sample output from the report: AgentGroupBusinessAttributeReport.pdf

The following tables explain the prompts you can select when you generate the report, and the metrics and attributes that are represented in the report:

# Prompts for the Agent Group Business Attribute Report

Prompt	Description
Pre-set Date Filter	From the list, choose a time period on which to report, and move it to the Selected list.
Start Date	Choose the first day from which to gather report data.
End Date	Choose the last day from which to gather report data.
Agent Group	Optionally, select one or more groups from which to gather data for the report.
Business Result	Optionally, specify what business results to include in the report (based on configured business results).
Customer Segment	Optionally, specify what customer segments to include in the report (based on customer-segment attribute(s) that are configured for a given tenant).
Service Type	Optionally, specify what type of service to include in the report (based on the type of service that was assigned to the interaction).
Media Type	Optionally, select the type of media to include in the report—for example, VOICE, EMAIL, and CHAT.
Interaction Type	Optionally, select the type of interaction to include in the report—for example, Inbound, Outbound, and Internal.
Tenant	For multi-tenant environments, optionally select the tenant(s) for which to include data in the report.

# Attributes used in the Agent Group Business Attribute Report

Attribute	Description
Tenant	This attribute enables data within the reporting interval to be organized by tenant.
Media Type	This attribute enables data to be organized by the interaction's media type—for example, VOICE, EMAIL, and CHAT.
Agent Group	This attribute enables data within the reporting interval to be organized by the groups to which agents belong.  An agent can belong to more than one agent group.
Business Result	This attribute enables data to be organized by the configured business result.
Customer Segment	This attribute enables data to be organized by the

Attribute	Description
	configured customer segment.
Service Type	This attribute enables data to be organized by the type of service that was assigned to the interaction.
Interaction Type	This attribute enables data to be organized by the interaction's type—for example, Inbound, Outbound, and Internal.
Day	This attribute enables data within the reporting interval to be organized by a particular day within a month and year. Day values are presented in YYYY-MM-DD format.

# Metrics used in the Agent Group Business Attribute Report

Metric	Description
Accepted	Agent Group Attribute: The total number of times that customer interactions or warm consultations were accepted, answered, pulled, or initiated by agents who belong to this agent group.
Responses	For voice and chat media, this metric represents the total number of times that customer interactions or warm consultations were accepted by agents who belong to this agent group. For email, this metric represents the total number of times that agents who belong to this agent group prepared an outbound reply.  For voice media, this metric is identical to Activity\Accepted; it returns positive values when agents initiate calls.
Handle Time (Fmt)	The total amount of time (HH:MM:SS) that agents who belong to this agent group spent handling interactions that the agents received.  Handle time is measured as the sum of engagement time (for example, talk time), hold time, ACW (Wrap) time, all consult time for interactions that the agent received, and all ACW time for consultations the agent received. Some of these components return zero values for some media types.
Avg Handle Time (Fmt)	The average amount of time (HH:MM:SS) that agents who belong to this agent group spent handling interactions that the agents received.  This metric is computed as handle time divided by the sum of accepted interactions and received consultations.
Engage Time (Fmt)	The total amount of time (HH:MM:SS) that agents who belong to this agent group were engaged with customers on interactions that the agents received.
Avg Engage Time (Fmt)	The average amount of time (HH:MM:SS) that

Metric	Description
	agents who belong to this agent group were engaged with customers.
Hold Time (Fmt)	The total amount of time (HH:MM:SS) that agents, who belong to this agent group, had customer interactions on hold.
Avg Hold Time (Fmt)	The average amount of time (HH:MM:SS) that agents who belong to this group had customer interactions on hold.  This metric is attributed to the interval in which interactions arrived at the agent (which can differ from the interval in which the interactions were placed on hold).
Consult Received Accepted	The total number of times that agents who belong to this agent group received and accepted collaborations or simple consultations that were associated with customer interactions.
Consult Received Time (Fmt)	The total amount of time (HH:MM:SS) that agents who belong to this agent group were engaged as recipients in collaboration or simple consultation, including related hold durations, where the collaborations/consultations were associated with customer interactions.
	This metric is attributed to the interval in which this agent was offered the collaboration/consultation request.
Avg Consult Received Time (Fmt)	The average amount of time, in seconds, that agents who belong to this agent group were engaged on collaboration calls or simple consultations that agents received, where the collaborations/consultations were associated with customer interactions.
Wrap Time (Fmt)	The total amount of time (HH:MM:SS) that agents who belong to this agent group spent in ACW state for customer interactions that the agents received.  This metric is attributed to the interval in which the agent was offered the interaction for which ACW was invoked.
Avg Wrap Time (Fmt)	The average amount of time (HH:MM:SS) that agents who belong to this agent group, spent on customer interactions while in ACW state.
Transfer Initiated Agent	The total number of times that agents, who belong to this agent group, transferred customer interactions.
	Both warm and blind transfers are reflected in this metric.
% Transfer Initiated	The percentage of accepted customer interactions that were transferred (warm or blind) by this agent.
Revenue	The total revenue that is generated during the interval by customer interactions handled by agents who belong to this agent group.

# Agent Group Interaction Handling Report

This page describes how you can use the (**Agents** folder) Agent Group Interaction Handling Report to see detailed information about the interaction-processing performance of one or more groups of agents during a specific range of days.

## Understanding the Agent Group Interaction Handling Report

						Agent G	roup	inte	action	Handii	ng Rep	oort
enant	Media Type	ype Agent Group		Interaction Typ	oe Day	/ Acce	Accepted		nses	Avg Handle Time (Fmt)	Avg Engage Time (Fmt)	Avg Hold Time (Fmt)
					2016-0	5-25	5		5	00:04:47	00:04:	47 00:00:0
					2016-0	5-27	5		5	00:04:19	00:04:	19 00:00:
				Inbound	2016-0	6-01	01 1		1	00:00:11	00:00:	11 00:00:
Ag	gent Group	Interaction	on Hand	ling Report	ł							
Day	Accepted	Responses	Avg Handle Time (Fmt)	Avg Engage Time (Fmt)	Avg Hold Time (Fmt)	Avg Wrap Time (Fmt)	Ini	ansfer tiated gent	% Transfe Initiate		eived	% Transfer Received Accepted
2016-05-2	5 5	5	00:04:47	00:04:47	00:00:00	00:00:00		0	0.00	%	0	0.00
2016-05-2	7 5	5	00:04:19	00:04:19	00:00:00	00:00:00		1	20.00	%	0	0.00
2016-06-0	1 1	1	00:00:11	00:00:11	00:00:00	00:00:00		0	0.00	%	0	0.00
016-06-0	2 1	1	00:16:34	00:16:34	00:00:00	00:00:00		0	0.00	%	0	0.00
16-06-0	8 2	2	00:04:21	00:04:21	00:00:00	00:00:00		1	50.00	%	0	0.00
	14	14	00:05:04	00:05:04	00:00:00	00:00:00		2	14.29	%	0	0.00
16-05-2	5 5	5	00:04:47	00:04:47	00:00:00	00:00:00		0	0.00	%	0	0.00
016-06-0	1 1	1	00:00:11	00:00:11	00:00:00	00:00:00		0	0.00	%	0	0.00
2016-06-0	2 1	1	00:16:34	00:16:34	00:00:00	00:00:00		0	0.00	%	0	0.00
	7	7	00:05:48	00:05:48	00:00:00	00:00:00		0	0.00	%	0	0.00
2016-05-2	5 5	5	00:04:47	00:04:47	00:00:00	00:00:00		0	0.00	%	0	0.00
\				00.00.11						-	n	

This report displays information about various aspects of interaction processing, including the number of interactions where a transfer is initiated and the number of interactions that are received by agent groups. This information is helpful when evaluating whether agent groups are transferring too many interactions.

Interaction processing (or handling) involves accepting interactions, placing interactions on hold, consultations, transfers, aftercall work, and conversing with customers.

Use this report to monitor the interaction processing performance of groups of agents over specific day ranges. The report displays information about Handle Time, Engage Time, Wrap Time, and various transfer initiation and acceptance metrics.

To get a better idea of what this report looks like, view sample output from the report: HRCXIAgentGroupInteractionHandlingReport.pdf

The following tables explain the prompts you can select when you generate the report, and the metrics and attributes that are represented in the report:

## Prompts for the Agent Group Interaction Handling Report

Prompt	Description
Pre-set Date Filter	Choose from the convenient list of predefined rolling time ranges, spanning one day or more, over which to run the report.
Start Date	Choose the first day from which to gather report data.
End Date	Choose the last day from which to gather report data.
Agent Group	Optionally, select one or more groups from which to gather data for the report.
Media Type	Optionally, select the type of media to include in the report—for example, VOICE, EMAIL, and CHAT.
Interaction Type	Optionally, select the type of interaction to include in the report—for example, Inbound, Outbound, and Internal.
Tenant	For multi-tenant environments, optionally select the tenant(s) for which to include data in the report.

## Attributes used in the Agent Group Interaction Handling Report

Attribute	Description
Tenant	This attribute enables data within the reporting interval to be organized by tenant.
Media Type	This attribute enables data to be organized by the interaction's media type—for example, VOICE, EMAIL, and CHAT.
Agent Group	This attribute enables data within the reporting interval to be organized by the groups to which agents belong. An agent can belong to more than one agent group.

Attribute	Description
Interaction Type	This attribute enables data to be organized by the interaction's type—for example, Inbound, Outbound, and Internal.
Day	This attribute enables data within the reporting interval to be organized by a particular day within a month and year. Day values are presented in YYYY-MM-DD format.

# Metrics used in the Agent Group Interaction Handling Report

Metric	Description
Accepted	The total number of times that customer interactions or warm consultations were accepted, answered, pulled, or initiated by agents who belong to this agent group.
Responses	For voice and chat media, this metric represents the total number of times that customer interactions or warm consultations were accepted by agents who belong to this agent group. For email, this metric represents the total number of times that agents who belong to this agent group prepared an outbound reply.  For voice media, this metric is identical to Activity\Accepted; it returns positive values when agents initiate calls.
Avg Handle Time (Fmt)	The average amount of time, in seconds, that agents who belong to this agent group spent handling interactions that the agents received.  This metric is computed as handle time divided by the sum of accepted interactions and received consultations.
Avg Engage Time (Fmt)	The average amount of time, in seconds, that agents who belong to this agent group were engaged with customers.
Avg Hold Time (Fmt)	The average amount of time, in seconds, that agents who belong to this group had customer interactions on hold.  This metric is attributed to the interval in which interactions arrived at the agent (which can differ from the interval in which the interactions were placed on hold).
Avg Wrap Time (Fmt)	The average amount of time, in seconds, that agents who belong to this agent group, spent on customer interactions while in ACW state.
Transfer Initiated Agents	The total number of times that agents, who belong to this agent group, transferred customer interactions.

Metric	Description
	Both warm and blind transfers are reflected in this metric.
% Transfer Initiated	The percentage of accepted customer interactions
Transfer Received Accepted	The total number of times that agents who belong to this agent group, received customer interactions that were successfully transferred to the agents.  Both warm and blind transfers are reflected in this metric.
%Transfer Received Accepted	The percentage of accepted customer interactions that were successfully transferred (warm or blind) to agents who belong to this agent group.

# Agent Group Membership Details Report

This page describes how you can use the (**Agents** and **Details** folders) **Agent Group Membership Details Report** to understand how agents are distributed among Agent Groups.

## Understanding the Agent Group Membership Details Report

Agent Group Membership Details Report							
Agent Group	Agent Name	Date Added	Date Remove				
	, A101_sw1 (A101_sw1)	1/14/2011 11:43:39 AM					
AG1	, A102_sw1 (A102_sw1)	1/14/2011 11:43:39 AM					
	Last A601_sw1, First A601_sw1 (A601_sw1)	1/14/2011 11:43:39 AM					
AG123	, User_Tenant (User_Tenant2)	1/14/2011 11:43:39 AM					
Name Comment	, Agent1 (Agent1)	1/14/2011 11:43:39 AM					
Agent Group 1	, Agent2 (Agent2)	1/14/2011 11:43:39 AM					
	, Agent1 (Agent1)	1/14/2011 11:43:39 AM					
Agent Group 2	, Agent2 (Agent2)	1/14/2011 11:43:39 AM					
AgentGroup1Ten	601_swTen1, 601_swTen1 (601_swTen1)	1/14/2011 11:43:39 AM					
	, MMAgent1 (MMAgent1)	1/14/2011 11:43:39 AM					
	, MMAgent10 (MMAgent10)	1/14/2011 11:43:39 AM					
	, MMAgent2 (MMAgent2)	1/14/2011 11:43:39 AM					
Chat distribution for processing	, MMAgent3 (MMAgent3)	1/14/2011 11:43:39 AM					
	, MMAgent4 (MMAgent4)	1/14/2011 11:43:39 AM					
	, MMAgent5 (MMAgent5)	1/14/2011 11:43:39 AM					
	, MMAgent6 (MMAgent6)	1/14/2011 11:43:39 AM					
	, MMAgent7 (MMAgent7)	1/14/2011 11:43:39 AM					
	, MMAgent8 (MMAgent8)	1/14/2011 11:43:39 AM					
	, MMAgent9 (MMAgent9)	1/14/2011 11:43:39 AM					
	, MMAgent1 (MMAgent1)	1/14/2011 11:43:39 AM					
	, MMAgent10 (MMAgent10)	1/14/2011 11:43:39 AM					
	, MMAgent2 (MMAgent2)	1/14/2011 11:43:39 AM					
	, MMAgent3 (MMAgent3)	1/14/2011 11:43:39 AM					
	, MMAgent4 (MMAgent4)	1/14/2011 11:43:39 AM					
E-mail distribution for processing	, MMAgent5 (MMAgent5)	1/14/2011 11:43:39 AM					
	, MMAgent6 (MMAgent6)	1/14/2011 11:43:39 AM					
	, MMAgent7 (MMAgent7)	1/14/2011 11:43:39 AM					
	, MMAgent8 (MMAgent8)	1/14/2011 11:43:39 AM					
	, MMAgent9 (MMAgent9)	1/14/2011 11:43:39 AM					
3-mail QA review group	, MMAgent5 (MMAgent5)	1/14/2011 11:43:39 AM					
	, 601_forTest (601_forTest)	1/14/2011 11:43:39 AM					
forTest	, 602 forTest /co	1/14/2011 11:43:39 AM					

Use the Agent Group Membership Details report to generate a detailed view of how agents are distributed among Agent Groups, including information about when each Agent entered and exited each group.

You can specify the Date, Agent Group, and Agent.

To get a better idea of what this report looks like, view sample output from the report: HRCXIAgentGroupMembershipDetails.pdf

The following tables explain the prompts you can select when you generate the report, and the metrics and attributes that are represented in the report:

## Prompts for the Agent Group Membership Details Report

Prompt	Description
Pre-set Day Filter	Choose a day from the list of preset options. This prompt overrides the Report Date value.
Report Date	Choose the starting date for the agent membership. Only agents who were added to the group after this date are included in the report.
Agent Group	Select one or more Agent Groups from which to gather data into the report.
Agent	Select one or more Agents from which to gather data into the report.

## Attributes used in the Agent Group Membership Details Report

Attribute	Description
Agent Group	This attribute enables data to be organized by Agent Group.
Agent Name	This attribute enables data to be organized by Agent Name.

## Metrics used in the Agent Group Membership Details Report

Metric	Description
Group Membership \ Date Added	The date and time when the agent joined the group.
Group Membership \ Date Removed	The date and time when the agent left the group.

# Agent Group Queue Business Attribute Report

This page describes how you can use the (**Agents** folder) Agent Group Queue Business Attribute Report to learn more about agent performance, including detailed call handling information for each agent.

## Understanding the Agent Group Queue Business Attribute Report



This report summarizes how interactions were characterized by:

- the system or by the agents who accepted and/or transferred them (through the groups to which the agents belonged).
- the queue-type device through which the interactions were distributed.
- the interaction media type (such as voice or chat) and interaction type (such as inbound or internal).
- each month-long period throughout the designated reporting interval.

Drilled results are provided only for month- or higher-level aggregations and for queue to queue group (and queue group to queue) actions.

Use this report to understand agent-activity results categorized by a wide range of attributes, including Agent Group, Business Result, Customer Segment, Interaction Type, Media Type, Queue, and Service Type.

To get a better idea of what this report looks like, view sample output from the report: SampleAgentGroupQueueBusinessResultReport.pdf

The following tables explain the prompts you can select when you generate the report, and the metrics and attributes that are represented in the report:

## Prompts for the Agent Group Queue Business Attribute Report

Prompt	Description
Pre-set Date Filter	Choose from the convenient list of predefined rolling time ranges, spanning one day or more, over which to run the report.
Start Date	Choose the first day from which to gather report data.
End Date	Choose the last day from which to gather report data.
Queue	Optionally, select one or more queues to include in the report.
Agent Group	Optionally, select one or more groups from which to gather data for the report.
Business Result	Optionally, specify what business results to include in the report (based on configured business results).
Customer Segment	Optionally, specify what customer segments to include in the report (based on customer-segment attribute(s) that are configured for a given tenant).
Service Type	Optionally, specify what type of service to include in the report (based on the type of service that was assigned to the interaction).
Media Type	Optionally, select the type of media to include in the report—for example, VOICE, EMAIL, and CHAT.
Interaction Type	Optionally, select the type of interaction to include in the report—for example, Inbound, Outbound, and Internal.
Tenant	For multi-tenant environments, optionally select the tenant(s) for which to include data in the report.

## Attributes for the Agent Group Queue Business Attribute Report

Attribute	Description
Tenant	This attribute enables data within the reporting interval to be organized by tenant.
Month	This attribute enables data within the reporting interval to be organized by a particular month within a year. Month values are presented in YYYY-MM format.
Agent Group	This attribute enables data within the reporting interval to be organized by the groups to which agents belong.
	An agent can belong to more than one agent group.
Queue	This attribute enables data within the reporting interval to be organized by the name of the ACD queue, virtual queue, interaction queue, or workbin.
Media Type	This attribute enables data to be organized by the interaction's media type—for example, Voice, Email, and Chat.
Interaction Type	This attribute enables data to be organized by the interaction's type—for example, Inbound, Outbound, and Internal.
Service Type	This attribute enables data to be organized by the type of service that was assigned to the interaction.
Customer Segment	This attribute enables data to be organized by the configured customer segment.
Business Result	This attribute enables data to be organized by the configured business result.

# Metrics used in the Agent Group Queue Business Attribute Report

Metric	Description
	The total number of times that interactions were received or initiated by agents who belong to this agent group.
Offered	The count includes interactions that were abandoned while inviting, handling attempts that the agent rejected, and warm consultations and conferences that the agent received. This count excludes simple consultations, whether they were initiated or received. For AGT_AGENT_QUEUE records, this metric relies on the value of the short-abandoned threshold as configured in the [agg-gim-thld-ID-IXN] section.

Metric	Description
Accepted	The total number of times that customer interactions or warm consultations were accepted, answered, pulled, or initiated by agents who belong to this agent group.  For voice media, this metric is identical to Activity\Responses.
Transfer Initiated Agent	The total number of times that agents, who belong to this agent group, transferred customer interactions.  Both warm and blind transfers are reflected in this metric.
Transfer Received Accepted	The total number of times that agents who belong to this agent group, received customer interactions that were successfully transferred to the agents.  Both warm and blind transfers are reflected in this metric.

If a resource (for example, an agent or a queue) was added to a group during the reporting interval, the activities that the resource performed while it was not a group member are excluded from measurements in the reports. This report includes only those activities that resources perform while they are part of the group.

# Agent Interaction Hierarchy Report

This page describes how you can use the (**Agents** folder) Agent Interaction Hierarchy Report to learn more about the hierarchy of interactions that were offered to agents.

## Understanding the Agent Interaction Hierarchy Report

enant	Media Type	Agent Name	Day	Offered	Accepted Thread	Accepted Unique	Accepted	Responded Unique	Responses	Avg Handle Time (Fmt)
		Sqa_15556667770_2275, Sqa_15556667770_2275 (Sqa_15556667770_2275)	2016-05-25	1	0	0	0	0	0	00:00:
		34a_13330001710_2213,34a_13330001710_2213 \34a_13330001710_2213)	Total	1	0	0	0	0	0	00:00:
			2016-05-25	5	0	5	5	0	5	00:04
		Sqa_15556667778_2275, Sqa_15556667778_2275 (Sqa_15556667778_2275)	2016-06-01	2	0	1	1	0	1	00:00
Chat	Chat		2016-06-02	1	0	1	1	0	1	00:16
			Total	8	0	7	7	0	7	00:05
		voice_2275_1, voice_2275_1 (voice_2275_1)	2016-05-27	6	0	5	5	0	5	00:04
Email			2016-06-08	3	0	2	2	0	2	00:04
			Total	9	0	7	7	0	7	00:04
		Sqa_15556667777_2275, Sqa_15556667777_2275 (Sqa_15556667777_2275)	2016-05-25	1	0	0	0	0	0	00:00
			2016-06-02	1	0	1	1	0	0	23:59
			Total	2	0	1	1	0	0	23:59
		Sqa_15556667771_2275, Sqa_15556667771_2275 (Sqa_15556667771_2275)	2016-06-02	1	0	1	1	0	0	00:00
	Email		2016-06-13	2	0	2	2	0	0	00:00
			Total	3	0	3	3	0	0	00:00
			2016-05-25	2	0	1	2	1	1	00:0

Use this report to understand the hierarchy of interactions that were offered to agents, including the nature of the accepted interactions and responses (whether interactions were threaded, logical, or base).

To get a better idea of what this report looks like, view sample output from the report: HRCXIAgentInteractionHierarchyReport.pdf

The following tables explain the prompts you can select when you generate the report, and the metrics and attributes that are represented in the report:

## Prompts for the Agent Interaction Hierarchy Report

Prompt	Description
Pre-set Date Filter	Choose from the convenient list of predefined rolling time ranges, spanning one day or more,

Prompt	Description
	over which to run the report.
Start Date	Choose the first day from which to gather report data.
End Date	Choose the last day from which to gather report data.
Agent Group	Optionally, select one or more groups from which to gather data for the report.
Agent	Optionally, select one or more agents from which to gather data for the report.
Media Type	Optionally, select the type of media to include in the report—for example, VOICE, EMAIL, and CHAT.
Interaction Type	Optionally, select the type of interaction to include in the report—for example, Inbound, Outbound, and Internal.
Tenant	For multi-tenant environments, optionally select the tenant(s) for which to include data in the report.

# Attributes used in the Agent Interaction Hierarchy Report

Attribute	Description
Tenant	This attribute enables data within the reporting interval to be organized by tenant.
Media Type	This attribute enables data to be organized by the interaction's media type—for example, Voice, Email, and Chat.
Agent Name	This attribute enables data to be organized by certain attributes of the agent who is associated with the interaction.
Day	This attribute enables data within the reporting interval to be organized by a particular day within a month and year. Day values are presented in YYYY-MM-DD format.

# Metrics used in the Agent Interaction Hierarchy Report

Metric	Description
Offered	The total number of times that interactions were received or initiated by an agent.  The count includes interactions that were abandoned while

Metric	Description
	inviting, handling attempts that the agent rejected, and warm consultations and conferences that the agent received. This count excludes simple consultations, whether they were initiated or received.
	For AG2_AGENT_QUEUE records, this metric relies on the value of the <b>short-abandoned threshold</b> option as configured in the <b>[agg-gim-thld-ID-IXN]</b> section.
Accepted Thread	The total number of customer-interaction threads that were accepted, pulled, or initiated for the first time by this agent.
	The total number of logical interactions that were accepted, initiated, or pulled by this agent.
Accepted Unique	This metric includes an agent's first participation in outbound replies to inbound interactions.
Accepted	The total number of times that customer interactions or warm consultations were accepted, answered, pulled, or initiated by this agent.
Responded Unique	The total number of first-time outbound replies in which this agent participated in response to customer interactions.  Any number of replies could be prepared in response to a customer interaction. This metric attributes only the first-connected reply to this agent, regardless of whether the reply was sent. This metric excludes outbound replies to consultations, outbound replies that the agent pulled from his/her personal workbin or rejected, and system-generated responses.
Responses	For voice and chat media, this metric represents the total number of times that customer interactions or warm consultations were accepted by this agent. For email, this metric represents the total number of times that the agent prepared an outbound reply.  For voice media, this metric is identical to Activity\Accepted; it returns positive values when agents initiate calls.
Avg Handle Time (Fmt)	The average amount of time, in seconds, that this agent spent handling interactions that the agent received.  This metric is computed as handle time divided by the sum of accepted interactions and received consultations.

# Agent Interval Based Report

This page describes how you can use the (**Agents** folder) Agent Interval Based Report to learn more about key agent performance indicators during specific time intervals.

#### Understanding the Agent Interval Based Report

enant	Media Type	a A	gent Nam	е	Hour	r	Interaction Type	Active Time (Fmt)	Accepted	Enga Tim (Fmt	e I	% Engage Time	
							Inbound	00:17:27		00:00	:00	0.00%	
					2011-04-11 12		Internal	00:17:27	3	00:09	:28	54.25%	
					2011-04-	11 12	Outbound	00:17:27		00:00	:00	0.00	
							IInknown	00.17.27		00.00	.00	0.00	
	nterv	al Ba	ased	Rep	ort								
	cepted	Engage Time (Fmt)	% Engage Time	Hold	Hold Time (Fmt)	% Hold Time		Consult Received Time (Fmt)	% Cons Receiv	ved	Ixn Wrap	Ixn Wrap Time (Fmt)	% Ixr Wrap Time
		00:00:00	0.00%		00:00:00	0.00	%	00:00:0	00 0	0.00%		00:00:00	0.00
	3	00:09:28	54.25%	1	00:00:14	1.34	% 0	00:00:0	00 0	0.00%	0	00:00:00	0.00
		00:00:00	0.00%		00:00:00	0.00	96	00:00:0	00 0	0.00%		00:00:00	0.00
		00:00:00	0.00%		00:00:00	0.00	0/0	00:00:0	00 0	0.00%		00:00:00	0.00
		00:00:00	0.00%		00:00:00	0.00	્રે જ	00:00:0	00 0	0.00%		00:00:00	0.00
	6	00:03:45	29.68%	0	00:00:00	0.00	% 0	00:00:0	00 0	0.00%	0	00:00:00	0.00
		00:00:00	0.00%		00:00:00	0.00	%	00:00:0	00 0	0.00%		00:00:00	0.00
		00:00:00	0.00%		00:00:00	0.00	9	00:00:0	00 0	0.00%		00:00:00	0.00
		00:00:00	0.00%		00:00:00	0.00	%	00:00:0	00 0	0.00%		00:00:00	0.00
	4	00:06:11	45.13%	6	00:01:57	14.23	% 1	00:00:0	)4 (	0.49%	0	00:00:00	0.00
		00:00:00	0.00%		00:00:00	0.00	%	00:00:0	00 0	0.00%		00:00:00	0.00
		00:00:00	0.00%		00:00:00	0.00	%	00:00:0	00 0	0.00%		00:00:00	0.00
		00:00:00	0.00%		00:00:00	0.00	9	00:00:0	00 0	0.00%		00:00:00	0.00
	6	00:02:37	21.72%	2	00:00:04	0.55	% 0	00:00:0	00 0	0.00%	0	00:00:00	0.00
					00:00:00	0.00				0.00%		00:00:00	0.00

This report generates a snapshot of agent interaction-processing activities during a range of hours that you specify within a particular day. This report is useful to those who manage contact center operations enabling them to view key performance indicators that are related to the agents they supervise and to assess agent productivity. No distinction is made between interactions that are routed directly from a switch and those that are routed via a mediation DN object. Use this report to understand agent interaction-processing activities (including Accepted, Consult, Hold, and Wrap times and percentages) during a specified range of hours.

This is an interval-based report, which means that counts and durations for the bulk of metrics are recognized in each interval in which interactions occur, regardless of when the interaction began or ended.

This report shows data only about interactions that occur at agent DNs during active sessions, and about the status of DNs associated with active agent sessions. To expand the report to include interactions that occur at DNs not associated with the agent, and the status of DNs not associated with the agent, contact your Genesys representative.

To get a better idea of what this report looks like, view sample output from the report: SampleAgentIntervalBasedReport.pdf

The following tables explain the prompts you can select when you generate the report, and the metrics and attributes that are represented in the report:

#### Prompts for the Agent Interval Based Report

Prompt	Description
Pre-set Day Filter	Choose from the convenient list of predefined rolling time ranges, spanning one day or more, over which to run the report.
Report Date	Choose the day from which to gather report data.
Agent Group	Optionally, select one or more groups from which to gather data for the report.
Agent	Optionally, select one or more agents to include in the report.
Media Type	Optionally, select the type of media to include in the report—for example, VOICE, EMAIL, and CHAT.
Interaction Type	Optionally, select the type of interaction to include in the report—for example, Inbound, Outbound, and Internal.
Tenant	For multi-tenant environments, optionally select the tenant(s) for which to include data in the report.

#### Attributes used in Agent Interval Based Report

Attribute	Description
Tenant	This attribute enables data within the reporting interval to be organized by tenant.
Media Type	This attribute enables data to be organized by the interaction's media type—for example, VOICE, EMAIL, and CHAT.
Agent Name	This attribute enables data to be organized by certain attributes of the agent who is associated with the interaction.

Attribute	Description
Hour	This attribute enables data within the reporting interval to be organized by a particular hour within a day. Hour values are presented in YYYY-MM-DD-HH24 format.
Interaction Type	This attribute enables data to be organized by the interaction's type—for example, Inbound, Outbound, and Internal.

# Metrics used in the Agent Interval Based Report

Metric	Description
Active Time (Fmt)	The total amount of time, in seconds, attributable to the interval between the beginning and end of this agent's login session(s) on a particular media channel.  In the scenarios where an agent logs into multiple switches, DNs, and/or queues, this measure starts the moment at which the agent logs in to the first switch/DN/queue (if this login falls within the interval) and ends at the moment at which the agent is no longer logged in to any switch/DN/queue (if logout falls within the interval). Note: If the agent is not forcibly logged out when the calendar day ends, login duration is split over both days.
Accepted	The total number of customer interactions and warm consultations that were accepted, answered, pulled, or initiated by this agent within the interval or accepted, answered, pulled, or initiated in a prior interval but that ensued in this interval.
Engage Time (Fmt)	The total amount of time (HH:MM:SS) that this agent was engaged with customers on interactions that the agent received within the interval or within a prior interval and that ensued 'in this interval.  This metric might include engagement time for interactions that the agent made or received while in the Not Ready or ACW (Wrap) states (if the underlying ICON application supplying data to Genesys Info Mart is configured appropriately). This metric excludes engagement time that is associated with collaborations, consultations, and other interaction-related durations, such as hold time, ACW time, and alert (ring) time.
% Engage Time	The percentage of time within the interval that this agent was engaged with customers, relative to the total duration within the interval of the agent's active session on a particular media channel.
Hold	The total number of times within the interval that this agent had customer calls on hold.
Hold Time (Fmt)	The total amount of time (HH:MM:SS) within the interval that this agent had customer interactions on hold. This metric counts all held durations for interactions, whether they were placed on hold

Metric	Description
	once or more than once.
% Hold Time	The percentage of time that this agent had customer interactions on hold within the interval, relative to the total duration of the agent's active session within the interval.
Consult Received Accepted	The total number of times within the interval that this agent received and accepted requests for collaboration or consultation where the collaborations/consultations were associated with customer interactions or where the agent accepted the interactions after the customer left the interaction.
Consult Received Time (Fmt)	The total amount of time (HH:MM:SS) within the interval that this agent as a recipient spent in collaborations or consultations, where the collaborations/consultations were associated with customer interactions. This time includes any hold duration that occurred within the interval and during the collaboration/consultation.
% Consult Received Time	The percentage of time within the interval that this agent spent on collaborations or consult interactions that the agent received, relative to the total duration within the interval of this agent's active session on a particular media channel.
Ixn Wrap	The total number of times within the interval that this agent was in ACW (Wrap) state for customer interactions that the agent received.
Ixn Wrap Time (Fmt)	The total amount of time (HH:MM:SS) within the interval that this agent spent in ACW (Wrap) state for customer calls that the agent received.
% Ixn Wrap Time	The percentage of time within the interval that this agent spent in ACW (Wrap) state associated with customer calls, relative to the total duration of the agent's active session within the interval.

This report provides results based on hour-level aggregation.

If a resource (for example, an agent or a queue) was added to a group during the reporting interval, the activities that the resource performed while it was not a group member are excluded from measurements in the reports. This report includes only those activities that resources perform while they are part of the group.

# Agent Login-Logout Details Report

This page describes how you can use the (**Agents** folder and **Details** folder) Agent Login-Logout Details Report to learn more about agent login sessions.

#### Understanding the Agent Login-Logout Details Report

Agent Login-Logout Details Report							
Tenant	Media Type	Agent Name	Start Timestamp	End Timestamp	Active Time (Fmt)		
			4/11/2011 12:30:34 PM	4/11/2011 12:40:38 PM	00:10:0		
		, A6001_sip (A6001_sip)	4/11/2011 12:40:44 PM	4/11/2011 12:44:49 PM	00:04:0		
			4/11/2011 12:48:30 PM	4/11/2011 12:51:48 PM	00:03:1		
			4/11/2011 1:03:16 PM	4/11/2011 1:15:54 PM	00:12:3		
		, A6002_sip (A6002_sip)	4/11/2011 12:31:08 PM	4/11/2011 12:38:02 PM	00:06:		
			4/11/2011 12:41:01 PM	4/11/2011 12:44:47 PM	00:03:4		
			4/11/2011 12:48:44 PM	4/11/2011 12:51:46 PM	00:03:		
			4/11/2011 1:03:28 PM	4/11/2011 1:08:23 PM	00:04:		
			4/11/2011 1:08:44 PM	4/11/2011 1:15:52 PM	00:07:		
			4/11/2011 12:31:38 PM	4/11/2011 12:38:04 PM	00:06:		
		, A6003 sip (A6003 sip)	4/11/2011 12:41:40 PM	4/11/2011 12:44:45 PM	00:03:		
		, A6003_sip (A6003_sip)	4/11/2011 12:49:19 PM	4/11/2011 12:50:50 PM	00:01:		
nvironment	Voice		4/11/2011 1:03:51 PM	4/11/2011 1:15:50 PM	00:11:		
Environment	VOICE		4/11/2011 12:32:09 PM	4/11/2011 12:38:06 PM	00:05:		
		, A6004_sip (A6004_sip)	4/11/2011 12:42:28 PM	4/11/2011 12:44:44 PM	00:02:		
			4/11/2011 12:51:08 PM	4/11/2011 12:51:44 PM	00:00:		
				05.17 PM	٥٥٠٠٥		

This report shows the times when agents logged in and out and the duration of each login session during a range of hours that you specify within a day. The report displays the timestamps in the tenant's standard time zone.

If an agent logs in to multiple DNs, the duration of the agent's overall login session, which is captured by the Active Time metric, begins with the first login event and ends with the last logout event. If the agent continues to be logged in over a two-day time span (or longer) and is not forcibly logged out by the system, login duration is split over each calendar day.

To get a better idea of what this report looks like, view sample output from the report: SampleHRCXIAgntLogInOutReport.pdf

The following tables explain the prompts you can select when you generate the report, and the metrics and attributes that are represented in the report:

## Prompts for the Agent Login-Logout Details Report

Prompt	Description
Pre-set Day Filter	Choose from the convenient list of predefined days for which to run the report.
•	The default selection for this report is Today.
Report Date	Choose a day for which to run the report.
Agent Group	Optionally, select one or more groups from which to gather data for the report.
Agent	Optionally, select one or more agents from which to gather data for the report.
Media Type	Optionally, select the type of media to include in the report; for example, VOICE, EMAIL, and CHAT.
Tenant	For multi-tenant environments, optionally select the tenant(s) for which to include data in the report.

## Attributes used in the Agent Login-Logout Details Report

Attribute	Description
Tenant	This attribute enables data within the reporting interval to be organized by tenant.
Media Type	This attribute enables data to be organized by the interaction's media type—for example, VOICE, EMAIL, and CHAT.
Agent Name	This attribute enables data to be organized by certain attributes of the agent who is associated with the interaction.
Start Timestamp	This attribute enables data to be organized by the calendar date and time when the agent session began.
End Timestamp	This attribute enables data to be organized by the calendar date and time when the agent session ended. If the agent has not logged out, the value of this attribute is NULL.

# Metrics used in the Agent Login-Logout Details Report

Metric	Description
beging on a intermagen meast logs agen agen componull i	total amount of time (HH:MM:SS) between the inning and end of this agent's login session(s) a particular media channel, irrespective of the rvals in which the resource session occurs. If an int logs into multiple DNs, login duration is assured from the moment at which the agent in to the first DN to the moment at which the int is no longer logged in to any DN. If the int's session was still active when the data was applied, the agent's session duration appears as in the reports.

# Agent Not Ready Reason Code Report

This page describes how you can use the (**Agents** folder) Agent Not Ready Reason Code Report to learn more about agent performance, including detailed call handling information for each agent.

### Understanding the Agent Not Ready Reason Code Report

			Age	ent Not Ready F	Reason Coo	le Report					
Tenant	Media Type	Agent Name	Hour	Reason Code	Not Ready Time (Fmt)	% Not Ready Time	Not Ready Reason Count	Not Ready Reason Time (Fmt)	% Not Ready Reason Time		
				NO REASON	00:00:00	0.00%		00:00:00	0.009		
			0011 04 11 10	RC_soft_2=71	00:00:00	0.00%		00:00:00	0.009		
			2011-04-11 12	RC_soft_3=81	00:00:00	0.00%		00:00:00	0.009		
		ACOO1 -i- (ACOO1 -i-)	2011-04-11 13	RC_soft=89	00:00:00	0.00%		00:00:00	0.009		
		, A6001_sip (A6001_sip)		NO REASON	00:06:19	50.00%		00:00:00	0.009		
				RC_soft_2=71	00:06:19	50.00%		00:00:00	0.009		
				2011 04 11 10	2011 04 11 10	RC_soft_3=81	00:06:19	50.00%		00:00:00	0.009
				RC_soft=89	00:06:19	50.00%		00:00:00	0.009		
			2011-04-11 12	NO REASON	00:00:10	1.22%		00:00:00	0.009		
		ce , A6002_sip (A6002_sip)		RC_soft_2=71	00:00:10	1.22%		00:00:00	0.009		
Environment	Voice			RC_soft_3=81	00:00:10	1.22%		00:00:00	0.009		
Environment	voice			RC_soft=89	00:00:10	1.22%		00:00:00	0.009		
				NO REASON	00:05:33	46.06%		00:00:00	0.009		
			2011-04-11-10-	RC_soft_2=71				00:00:00	0.00		

This report provides counts, durations, and percentages for each NotReady reason code during the range of hours that you specify within a particular day. The reason codes that are provided by this report are not necessarily tied to specific interactions.

Use this report to understand the time agents spent in a NotReady state, and to identify the most common reasons given, the longest durations, and to identify those agents who spend the most or least amount of time in the NotReady state.

This report shows data only about interactions that occur at agent DNs during active sessions, and about the status of DNs associated with active agent sessions. To expand the report to include interactions that occur at DNs not associated with the agent, and the status of DNs not associated with the agent, contact your Genesys representative.

To get a better idea of what this report looks like, view sample output from the report: SampleAgentNtRdyRsnCdReport.pdf

The following tables explain the prompts you can select when you generate the report, and the metrics and attributes that are represented in the report:

### Prompts for the Agent Not Ready Reason Code Report

Prompt	Description
Pre-set Day Filter	Choose from the convenient list of predefined rolling time ranges, spanning one day or more, over which to run the report.
Report Date	Choose a day for which to run the report.
Agent Group	Optionally, select one or more groups from which to gather data for the report.
Agent	Optionally, select one or more agents from which to gather data for the report.
Reason Code Type	Optionally, select the type of reason code on which to gather data.
Media Type	Optionally, select the type of media to include in the report—for example, VOICE, EMAIL, and CHAT.
Tenant	For multi-tenant environments, optionally select the tenant(s) for which to include data in the report.

## Attributes used in the Agent Not Ready Reason Code Report

Attribute	Description
Tenant	This attribute enables data within the reporting interval to be organized by tenant.
Media Type	This attribute enables data to be organized by the interaction's media type—for example, VOICE, EMAIL, and CHAT.
Agent Name	This attribute enables data to be organized by certain attributes of the agent who is associated with the interaction.
Hour	This attribute enables data within the reporting interval to be organized by a particular hour within a day. Hour values are presented in YYYY-MM-DD-HH24 format.
Reason Code	This attribute enables data within the reporting interval to be organized by the reason that the agent selected.

## Metrics used in the Agent Not Ready Reason Code Report

Metric	Description		
Reason Code	The reason code key of the agent's not-ready state, and the key's value. You can customize this report to display only the key values, if values are distinct in your environment.		
Not Ready Time (Fmt)	The total amount of time (HH:MM:SS) within the interval that this agent was in the NotReady state for a particular media channel (including Do Not Disturb duration, if configured) regardless of whether a reason was indicated.		
% Not Ready Time	The percentage of time within the interval that this agent's state was NotReady, relative to the total duration within the interval of the agent's active session on a particular media channel.		
Not Ready Reason Count	The total number of times within the interval that this agent was in the NotReady state on a particular media channel (including instances of Do Not Disturb, if configured) for this reason.		
Not Ready Reason Time (Fmt)	The total amount of time (HH:MM:SS) within the interval that this agent was in the NotReady state on a particular media channel (including Do Not Disturb duration, if configured) for the specified reason.		
% Not Ready Reason Time	The percentage of time within the interval that this agent was in the NotReady state that can be attributed to a specific hardware or software reason code, relative to the agent's total NotReady duration within the interval for a particular media channel. If no reason codes have been set up in your environment, this metric returns 0.		

For this report to be useful, your environment must both configure hardware and/or software reason codes, and enable contact center operators to assign hardware- or software-related reasons for placing their voice-specific DNs in a NotReady state.

Software reason codes have a higher priority than hardware reason codes. When reason codes of both types occur simultaneously, Genesys Info Mart records the software reason to the Info Mart database.

# Agent Not Ready Report

This page describes how you can use the (**Agents** folder) Agent Not Ready Report to learn more about the time agents spend in the Not Ready State.

### Understanding the Agent Not Ready Report

				Ager	nt Not Re	ady Repo	rt						
Tenant	Media Type	Agent Name	Interaction Type	Hour	Active Time (Fmt)	Not Ready Time (Fmt)	Not Ready In	Not Ready In Time (Fmt)	Not Ready Out	Not Ready Out Time (Fmt)	% Not Ready Time	% Not Ready In Time	% Not Ready Out Time
			Inbound	2011-04-11 12	00:17:27	00:00:00		00:00:00		00:00:00	0.00%	0.00%	0.00%
			IIIDoulia	2011-04-11 13	00:12:38	00:06:19		00:00:00		00:00:00	50.00%	0.00%	0.00%
			Internal	2011-04-11 12	00:17:27	00:00:00	0	00:00:00	0	00:00:00	0.00%	0.00%	0.00%
		46001 sin (46001 sin)	internal	2011-04-11 13	00:12:38	00:06:19	0	00:00:00	3	00:01:45	50.00%	0.00%	27.70%
		, A6001_sip (A6001_sip)	Outbound	2011-04-11 12	00:17:27	00:00:00		00:00:00		00:00:00	0.00%	0.00%	0.00%
			Outbound	2011-04-11 13	00:12:38	00:06:19		00:00:00		00:00:00	50.00%	0.00%	0.00%
			Unknown	2011-04-11 12	00:17:27	00:00:00		00:00:00		00:00:00	0.00%	0.00%	0.00%
			Unknown	2011-04-11 13	00:12:38	00:06:19		00:00:00		00:00:00	50.00%	0.00%	0.00%
		, A6002_sip (A6002_sip)	Inbound	2011-04-11 12	00:13:42	00:00:10		00:00:00		00:00:00	1.22%	0.00%	0.00%
				2011-04-11 13	00:12:03	00:05:33		00:00:00		00:00:00	46.06%	0.00%	0.00%
			Internal	2011-04-11 12	00:13:42	00:00:10	0	00:00:00	0	00:00:00	1.22%	0.00%	0.00%
				2011-04-11 13	00:12:03	00:05:33	0	00:00:00	0	00:00:00	46.06%	0.00%	0.00%
Environment	Voice		Outbound	2011-04-11 12	00:13:42	00:00:10		00:00:00		00:00:00	1.22%	0.00%	0.00%
Environment	Voice			2011-04-11 13	00:12:03	00:05:33		00:00:00		00:00:00	46.06%	0.00%	0.00%
			Unknown	2011-04-11 12	00:13:42	00:00:10		00:00:00		00:00:00	1.22%	0.00%	0.00%
				2011-04-11 13	00:12:03	00:05:33		00:00:00		00:00:00	46.06%	0.00%	0.00%
		Inbound	Inhound	2011-04-11 12	00:11:02	00:01:47		00:00:00		00:00:00	16.16%	0.00%	0.00%
			IIIDOUIIU	2011-04-11 13	00:11:59	00:10:41		00:00:00		00:00:00	89.15%	0.00%	0.00%
				2011-04-11 12	00:11:02	00:01:47	0	00:00:00	0	00:00:00	16.16%	0.00%	0.00%
			IIIterriai	2011-04-11 13	00:11:59	00:10:41	0	00:00:00	0	00:00:00	89.15%	0.00%	0.00%
		(A6003_sip)		2011-04-11_12							16.16%	0.00%	

This report provides detailed information about the time agents spend in the NotReady state.

Use this report to monitor the counts, durations, and percentages of calls that are made and received by an agent, while that agent's state is NotReady, during a range of hours that you specify within a particular day.

This report shows data only about interactions that occur at agent DNs during active sessions, and about the status of DNs associated with active agent sessions. To expand the report to include interactions that occur at DNs not associated with the agent, and the status of DNs not associated with the agent, contact your Genesys representative.

To get a better idea of what this report looks like, view sample output from the report: SampleAgentNotRdyReport.pdf

The following tables explain the prompts you can select when you generate the report, and the metrics and attributes that are represented in the report:

### Prompts for the Agent Not Ready Report

Prompt	Description
Pre-set Day Filter	Choose from the convenient list of predefined rolling time ranges, spanning one day or more, over which to run the report.
Report Date	Choose a day for which to run the report.
Agent Group	Optionally, select one or more groups from which to gather data for the report.
Agent	Optionally, select one or more agents to include in the report.
Media Type	Optionally, select the type of media to include in the report—for example, VOICE, EMAIL, and CHAT.
Interaction Type	Optionally, select the type of interaction to include in the report—for example, Inbound, Outbound, and Internal.
Tenant	For multi-tenant environments, optionally select the tenant(s) for which to include data in the report.

## Attributes used in the Agent Not Ready Report

Attribute	Description
Tenant	This attribute enables data within the reporting interval to be organized by tenant.
Media Type	This attribute enables data to be organized by the interaction's media type—for example, VOICE, EMAIL, and CHAT.
Agent Name	This attribute enables data to be organized by certain attributes of the agent who is associated with the interaction.
Interaction Type	This attribute enables data to be organized by the interaction's type—for example, Inbound, Outbound, and Internal.
Hour	This attribute enables data within the reporting interval to be organized by a particular hour within a day. Hour values are presented in YYYY-MM-DD-HH24 format.

# Metrics used in the Agent Not Ready Report

Metric	Description
Active Time (Fmt)	The total amount of time, in seconds, attributable to the interval between the beginning and end of this agent's login session(s) on a particular media channel. In the scenario in which an agent logs into multiple switches, DNs, and/or queues, this metric starts at the moment when the agent logs in to the first switch/DN/queue (if this login falls within the interval) and ends at the moment when the agent is no longer logged in to any switch/DN/queue (if logout falls within the interval).  If the agent is not forcibly logged out when the calendar day ends, login duration is split over both days.
Not Ready Time (Fmt)	The total amount of time (HH:MM:SS) within the interval that this agent was in the NotReady state for a particular media channel (including Do Not Disturb duration, if configured) regardless of whether a reason was indicated.
Not Ready In	The total number of times that this agent was handling customer calls that were accepted while the agent was in the NotReady state.
Not Ready In Time (Fmt)	The total amount of time (HH:MM:SS) that this agent was handling customer interactions that the agent received while the agent was in the NotReady state. This time includes the alert (ring) time of the accepted interactions.
Not Ready Out	The total number of times that this agent initiated outbound or internal interactions while in the NotReady state. The count excludes consultations that the agent participated in while in NotReady state.
Not Ready Out Time (Fmt)	The total amount of time (HH:MM:SS) that this agent spent handling outbound or internal interactions that the agent initiated while in the NotReady state. This duration includes dial time, engagement time, and hold time and excludes consultations that the agent participated in while in NotReady state.
% Not Ready Time	The percentage of time within the interval that this agent's state was NotReady, relative to the total duration within the interval of the agent's active session on a particular media channel.
% Not Ready In Time	The percentage of time that this agent spent on customer interactions that were accepted within the interval while the agent was in the NotReady state, relative to the agent's total NotReady duration within the interval for a particular media channel.  Consultations and collaborations that the agent receives while in the NotReady state are excluded from this percentage.
% Not Ready Out Time	The percentage of time that this agent spent on customer interactions that were dialed within the interval while the agent was in the NotReady state, relative to the agent's total NotReady duration within the interval.

This report provides meaningful data for the In and Out metrics only if the ICON application that is supplying data to the Info Mart database is configured to recognize uninterrupted ACW and NotReady states (**gls-enable-acwbusy**). In situations where agents indicate they are ready when in fact they are handling calls, the % Not Ready In Time and % Not Ready Out Time metrics may exceed 100%.

# Agent Omnichannel Activity Report

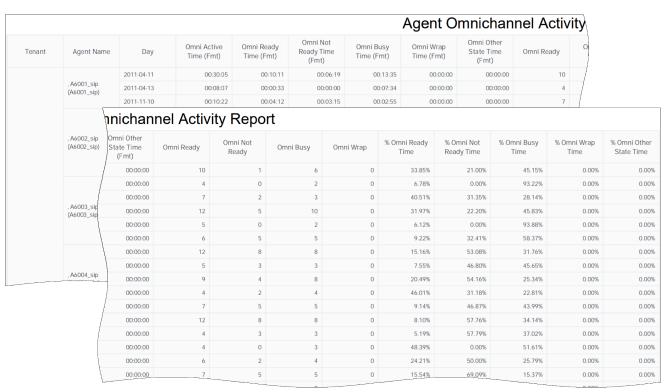
This page describes how you can use the (**Agents** folder) Agent Omnichannel Activity Report to see detailed information about how each agent's active time was used.

This report requires that the RAA option enable-media-neutral be enabled. For more information, see the *Genesys CX Insights Deployment Guide*.

#### Tip

This report is similar to the Agent Summary Activity Report (Active), with the notable difference that this report does not distinguish between different media channels.

### Understanding the Agent Omnichannel Activity Report



This report provides a breakdown of the duration of the different states that an agent can be in (Ready, Not Ready, Busy, and Other), across all media channels, fully accounting for the agent's interaction time (time spent handling interactions).

Use this report to understand how much of agent total active time was spent in each state, summarized for all media types. The report tracks a wide range of metrics that break down both the *amount* and *percentage* of active time spent in each state, and the number of times the agent was in each state.

To get a better idea of what this report looks like, view sample output from the report: HRCXIAgentOmnichannelActivityReport.pdf

The following tables explain the prompts you can select when you generate the report, and the metrics and attributes that are represented in the report:

#### Prompts for the Agent Omnichannel Activity Report

Prompt	Description
Pre-set Date Filter	Choose from the convenient list of predefined rolling time ranges, spanning one day or more, over which to run the report.
Start Date	Choose the first day from which to gather report data.
End Date	Choose the last day from which to gather report data.
Agent Group	Optionally, select one or more groups from which to gather data for the report.
Agent	Optionally, select one or more agents from which to gather data for the report.
Tenant	For multi-tenant environments, optionally select the tenant(s) for which to include data in the report.

#### Attributes used in the Agent Omnichannel Activity Report

Attribute	Description
Tenant	This attribute enables data within the reporting interval to be organized by tenant.
Agent Name	This attribute enables data to be organized by certain attributes of the agent who is associated with the interaction.
Day	This attribute enables data within the reporting interval to be organized by a particular day within a month and year. Day values are presented in YYYY-MM-DD format.

# Metrics used in the Agent Omnichannel Activity Report

Metric	Description
Omni Active Time (Fmt)	The total amount of time (HH:MM:SS) attributable to the interval between the beginning and end of this agent's login session(s), irregardless of media channel. In the scenario in which an agent logs into multiple switches, DNs, and/or queues, this metric starts the moment at which the agent logs in to the first switch/DN/queue (if this login falls within the interval) and ends at the moment at which the agent is no longer logged in to any switch/ DN/queue (if logout falls within the interval).
Omni Ready Time (Fmt)	The total amount of time (HH:MM:SS) that this agent was in the Ready state, irregardless of media channel.
Omni Not Ready Time (Fmt)	The total amount of time (HH:MM:SS) within the interval that this agent was in the NotReady state, irregardless of media channel (including Do Not Disturb duration, if configured) regardless of whether a reason was indicated.
Omni Busy Time (Fmt)	The total duration (HH:MM:SS) of all of interaction-processing activities, including the time that is associated with requests for consultation that the agent received and excluding the time spent processing after-call work, irregardless of media channel.
Omni Wrap Time (Fmt)	The total amount of time (HH:MM:SS) within the interval that this agent spent in ACW (Wrap) state whether or not the reason for entering this state was related to an interaction, irregardless of media channel.
Omni Other State Time (Fmt)	The total amount of time (HH:MM:SS) that the state of this agent was neither Ready nor NotReady after login, irregardless of media channel. The situation in which the state of an agent is neither Ready nor NotReady usually occurs upon first login if the switch, for instance, does not force agents into the Ready state upon login.
Omni Ready	The number of times the agent entered the Ready state, irregardless of media channel.
Omni Not Ready	The number of times the agent entered the Not Ready state, irregardless of media channel.
Omni Busy	The number of times the agent entered the Busy state, irregardless of media channel.
Omni Wrap	The number of times the agent entered the Wrap state, irregardless of media channel.
% Omni Ready Time	The percentage of time within the interval that this agent's state was Ready, relative to the total duration within the interval of the agent's active session, irregardless of media channel.
% Omni Not Ready Time	The percentage of time within the interval that this agent's state was NotReady, relative to the total duration within the interval of the agent's active session, irregardless of media channel.
% Omni Busy Time	The percentage of time of all interaction-processing activities, irregardless of media channel.

Metric	Description
% Omni Wrap Time	The percentage of time that this agent spent in ACW (Wrap) state within the interval, relative to the total duration of the agent's active session within the interval, irregardless of media channel.
% Omni Other State Time	The percentage of time that the state of this agent was neither Ready nor NotReady after login, irregardless of media channel.

# Agent Outbound Campaign Report

This page describes how you can use the (**Agents** folder) Agent Outbound Campaign Report to see detailed information about agent performance in your outbound campaigns.

### Understanding the Agent Outbound Campaign Report

Agent Outbound Campaign Report								
Tenant	Agent Name	Campaign	Business Result	Day				
Sqa_15556667777_2275, Sqa_15556667777_2275 (Sqa_15556667777	Sqa_15556667777_2275, Sqa_15556667777_2275 (Sqa_15556667777_2275)	C_2275.June_1_2.1550C88360A14C6100A14017200000000000	DEFAULT_BUSINESS_RESULT	2016-06-01				
		C_2275.May_25_1.154E7F0364D5B51430A14017200000000000	DEFAULT_BUSINESS_RESULT	2016-05-25				
		C_2275.May_27_1.154F21604BC0C07550A14017200000000000	DEFAULT_BUSINESS_RESULT	2016-05-27				
	Total							
Total								

Agent Outbound Campaign Report											
Campaign	Business Result	Day	Avg Handle Time (Fmt)	Engage Time (Fmt)	Avg Engage Time (Fmt)	Hold Time (Fmt)	Avg Hold Time (Fmt)	Wrap Time (Fmt)	Avg Wrap Time (Fmt)	Preview Time (Fmt)	Avg Preview Time (Fmt)
3360A14C6100A140172000000000000	DEFAULT_BUSINESS_RESULT	2016-06-01	00:00:07	00:00:07	00:00:07	00:00:00	00:00:00	00:00:00	00:00:00	00:00:00	00:00:00
64D5B51430A14017200000000000	DEFAULT_BUSINESS_RESULT	2016-05-25	00:00:25	00:00:50	00:00:25	00:00:00	00:00:00	00:00:00	00:00:00	00:00:00	00:00:00
04BC0C07550A14017200000000000	DEFAULT_BUSINESS_RESULT	2016-05-27	00:00:14	00:00:14	00:00:14	00:00:00	00:00:00	00:00:00	00:00:00	00:00:00	00:00:00
			00:00:18	00:01:11	00:00:18	00:00:00	00:00:00	00:00:00	00:00:00	00:00:00	00:00:00
			00:00:18	00:01:11	00:00:18	00:00:00	00:00:00	00:00:00	00:00:00	00:00:00	00:00:00

This report provides total and average durations of call-handling activities (including Handle Time, Wrap Time, Preview Time, Engage Time, and Hold Time) for agents who participate in outbound campaigns.

Use this report in conjunction with the reports in the Outbound Campaign folder to understand agent performance in your outbound campaigns, by reviewing total and average durations of call handling activities (including Handle Time, Wrap Time, Preview Time, Engage Time, and Hold Time) for each agent.

To get a better idea of what this report looks like, view sample output from the report: HRCXIAgentOutboundCampaignReport.pdf

The following tables explain the prompts you can select when you generate the report, and the metrics and attributes that are represented in the report:

## Prompts for the Agent Outbound Campaign Report

Prompt	Description
Pre-set Date Filter	Choose from the convenient list of predefined rolling time ranges, spanning one day or more, over which to run the report.
Start Date	Choose the first day from which to gather report data.
End Date	Choose the last day from which to gather report data.
Business Result	Optionally, select one or more Business Results to include in the report.
Campaign	Optionally, select one or more campaigns from which to gather data for the report.
Agent Group	Optionally, select one or more groups from which to gather data for the report.
Agent	Optionally, select one or more agents from which to gather data for the report.
Tenant	For multi-tenant environments, optionally select the tenant(s) for which to include data in the report.

## Attributes used in the Agent Outbound Campaign Report

Attribute	Description
Tenant	This attribute enables data within the reporting interval to be organized by tenant.
Agent Name	This attribute enables data to be organized by certain attributes of the agent who is associated with the interaction.
Campaign	This attribute enables data to be organized by the name of the outbound campaign.
Business Result	This attribute enables data to be organized by the configured business result.
Day	This attribute enables data within the reporting interval to be organized by a particular day within a month and year. Day values are presented in YYYY-MM-DD format.

# Metrics used in the Agent Outbound Campaign Report

Metric	Description
Avg Handle Time (Fmt)	The average amount of time (HH:MM:SS) that this agent spent handling interactions that the agent received.
	This metric is computed as handle time divided by the sum of accepted interactions and received consultations.
Engage Time (Fmt)	The total amount of time (HH:MM:SS) that this agent was engaged with customers on interactions that the agent received.
Avg Engage Time (Fmt)	The average amount of time (HH:MM:SS) that this agent was engaged with customers.
Hold Time (Fmt)	The total amount of time (HH:MM:SS) that this agent had customers on hold for interactions that were associated with this campaign.
	The average amount of time (HH:MM:SS) that this agent had customer interactions on hold.
Avg Hold Time (Fmt)	This metric is attributed to the interval in which interactions arrived at the agent (which can differ from the interval in which the interactions were placed on hold).
Wrap Time (Fmt)	The total amount of time (HH:MM:SS) that this agent spent in ACW (Wrap) state for customer interactions that the agent received and that were associated with this campaign.
Avg Wrap Time (Fmt)	The average amount of time (HH:MM:SS) that this agent spent on customer interactions while in ACW (Wrap) state.
Preview Time (Fmt)	The total amount of time (HH:MM:SS) that this agent spent previewing customer interactions that are associated with this campaign that the agent requested or that Interaction Server pushed to the agent's desktop.
Treview Time (Time)	This metric also includes the time spent sending the request from OCS to the Interaction Server, and Interaction Server routing the call to the Agent and as a result, for OCS Push-Preview campaigns, this metric sometimes has a larger-than-expected value.
	The average amount of time (HH:MM:SS) that this agent spent previewing interactions that the agent requested or that Interaction Server pushed to the agent's desktop.
Avg Preview Time (Fmt)	This metric also includes the time spent sending the request from OCS to the Interaction Server, and Interaction Server routing the call to the Agent and as a result, for OCS Push-Preview campaigns, this metric sometimes has a larger-than-expected value.

# Agent Queue Report

This page describes how you can use the (**Agents** folder) Agent Queue Report to learn more about agent performance, including detailed call handling information for each agent.

#### Understanding the Agent Queue Report

						A	gent	Queue 1	Report	
Tenant	Media Type	Media Type Agent Na		Queue	Queue Type	Interaction Type		Day	Accepted	
		7.0001	- (36001 sin)	UNKNOWN	UNKNOWN	Internal		2011-04-11	0/	
		, A6001_S1	p (A6001_sip)	UNKNOWN	UNKNOWN	incernal		2011-11-10	1	
	gent	Queue 1	Report						,	
	Туре	Day	Accepted	Avg Handle Time (Fmt)	Engage Time (Fmt)	Avg Engage Time (Fmt)	Hold Time (Fmt)	Avg Hol Time (Fmt)	d Wrap Time (Fmt)	Avg Wra Time (Fmt)
		2011-04-11	0	00:00:00	00:00:00	00:00:00	00:00:0	00:00:0	00:00:00	00:00:0
		2011-11-10	0	00:00:00	00:00:00	00:00:00	00:00:0	00:00:0	00:00:00	00:00:0
		2011-04-13	2	00:03:06	00:03:20	00:01:40	00:02:5	00:01:2	00:00:00	00:00:0
		2011-04-11	10	00:01:05	00:08:48	00:00:53	00:02:0	00:00:2	00:00:00	00:00:0
		2011-11-03	5	00:01:12	00:04:36	00:00:55	00:01:2	00:00:1	00:00:00	00:00:0
		2011-11-08	8	00:01:03	00:05:42	00:00:43	00:02:4	10 00:00:2	20 00:00:00	00:00:0
		2011-11-10	3	00:00:52	00:02:06	00:00:42	00:00:3	00:00:1	00:00:00	00:00:0
		2011-04-11	3	00:00:39	00:01:24	00:00:28	00:00:1	00:00:0	00:00:00	00:00:0
		2011-04-11	3	00:01:06	00:03:04	00:01:01	00:00:0	00:00:0	00:00:00	00:00:0
		2011-04-13	2	00:00:10	00:00:08	00:00:04	00:00:0	00:00:0	00:00:00	00:00:0
		2011-11-03	4	00:00:44	00:00:56	00:00:14	00:00:0	00:00:0	00:00:00	00:00:0
		2011-11-08	7	00:01:00	00:03:29	00:00:30	00:00:4	14 00:00:1	00:00:00	00:00:0
		2011-11-10	3	00:00:33	00:01:26	00:00:29	00:00:0	00:00:0	00:00:00	00:00:0
		2011-04-11	2	00:01:13	00:02:12	00:01:06	00:00:0	00:00:0	00:00:00	00:00:0
		2011-04-11	1	00:01:52	00:01:43	00:01:43	00:00:0	00:00:0	00:00:00	00:00:0
		2011-04-13	2	00:00:13	00:00:13	00:00:07	00:00:0	00:00:0	00:00:00	00:00:0
		2011-11-03	0	00:01:03	00:00:00	00:00:00	00:00:0	00:00:0	00:00:00	00:00:0
	1		-		00-0					

This report enables supervisors to monitor the interaction-processing performance of an agent (or all agents) by the queue from which interactions were distributed during a range of days that you specify. The report plots average handle time by agent and by queue (or virtual queue). Interaction processing (or handling) involves accepting interactions, placing calls on hold, consultations, transfers, after-call work, and conversing.

Genesys supports customization of the Avg Handle Time metric to align it with your business's own

definition of this term. For the supported alternate definition(s), open the properties of this metric in the universe and read its description.

Use this report to understand agent interaction-processing on a queue-by-queue basis, based on Engage, Hold, and Wrap times and percentages.

To get a better idea of what this report looks like, view sample output from the report: SampleAgentQueueReport.pdf

The following tables explain the prompts you can select when you generate the report, and the metrics and attributes that are represented in the report:

### Prompts for the Agent Queue Report

Prompt	Description
Pre-set Date Filter	Choose from the convenient list of predefined rolling time ranges, spanning one day or more, over which to run the report.
Start Date	Choose the first day from which to gather report data.
End Date	Choose the last day from which to gather report data.
Queue Group	Optionally, select one or more queue groups to include in the report.
Queue	Optionally, select one or more queues to include in the report.
Agent Group	Optionally, select one or more groups from which to gather data for the report.
Agent	Optionally, select one or more agents to include in the report.
Media Type	Optionally, select the type of media to include in the report—for example, VOICE, EMAIL, and CHAT.
Interaction Type	Optionally, select the type of interaction to include in the report—for example, Inbound, Outbound, and Internal.
Tenant	For multi-tenant environments, optionally select the tenant(s) for which to include data in the report.

### Attributes used in the Agent Queue Report

Attribute	Description
Tenant	This attribute enables data within the reporting interval to be organized by tenant.

Attribute	Description
Media Type	This attribute enables data to be organized by the interaction's media type—for example, VOICE, EMAIL, and CHAT.
Agent Name	This attribute enables data to be organized by certain attributes of the agent who is associated with the interaction.
Queue	This attribute enables data within the reporting interval to be organized by the name of the ACD queue, virtual queue, interaction queue, or workbin.
Queue Type	This attribute enables data within the reporting interval to be organized by the type of queue, such as ACDQueue, VirtualQueue, InteractionQueue, or InteractionWorkBin.
Interaction Type	This attribute enables data to be organized by the interaction's type—for example, Inbound, Outbound, and Internal.
Day	This attribute enables data within the reporting interval to be organized by a particular day within a month and year. Day values are presented in YYYY-MM-DD format.

# Metrics used in the Agent Queue Report

Metric	Description
Accepted	The total number of times that customer interactions or warm consultations were accepted, answered, pulled, or initiated by this agent.  For voice media, this metric is identical to Activity\Responses.
Avg Handle Time (Fmt)	The average amount of time (HH:MM:SS) that this agent spent handling interactions that the agent received and were distributed or pulled from this queue.  This metric is computed as handle time divided by the sum of accepted interactions and received consultations.
Engage Time (Fmt)	For interactions that were distributed or pulled from this queue, the total amount of time (HH:MM:SS) that this agent was engaged with customers on interactions that the agent received.  This metric excludes other interaction-related durations, such as hold time, ACW (Wrap) time, alert (ring) time, and time that is spent in collaboration or consultation.

Metric	Description
Avg Engage Time (Fmt)	For interactions that were distributed or pulled from this queue, the average amount of time (HH:MM:SS) that this agent was engaged with customers.
Hold Time (Fmt)	The total amount of time (HH:MM:SS) that this agent had customer interactions, distributed from this queue, on hold.
Avg Hold Time (Fmt)	The average amount of time (HH:MM:SS) that this agent had customer interactions, that were distributed from this queue, on hold. This metric is attributed to the interval in which interactions arrived at the agent (which can differ from the interval in which the interactions were placed on hold).
Wrap Time (Fmt)	The total amount of time (HH:MM:SS) that this agent was in ACW state for customer interactions that the agent received from this queue.  This metric is attributed to the interval in which the agent was offered the interaction for which ACW was invoked.
Avg Wrap Time (Fmt)	The average amount of time (HH:MM:SS) that this agent spent on customer interactions while in ACW state, where the interactions were distributed from this queue.

For multiple-switch environments that share the same queue names across switches, you can customize this report to recognize a particular switch-queue combination (instead of the queue alone) to retrieve the desired results.

This report also provides results for interaction-flow scenarios where the interactions do not flow through any queue device.

# Agent Social Engagement Report

This page describes how you can use the (**Agents** folder) Agent Social Engagement Report to learn more about average agent social media scores.

This report requires that the RAA option eServicesSM be enabled. For more information, see the *Genesys CX Insights Deployment Guide*.

#### Understanding the Agent Social Engagement Report

				Agent S	Social Engagem	ent Report					
Tenant	Media Type	Agent Name	Category	Classify Sentiment Category	Influence Category	Classify Actionability Category	Day	Accepted	Avg Sentiment Score	Avg Influence Score	Avg Actionability Score
							2011-04-11	9	1.05	1.00	2.50
		, A6001_sip (A6001_sip)	blue	positive	wide	positive	2011-04-13	2	2.50	2.50	1.05
							2011-11-10	3	1.00	1.50	2.50
							2011-04-11	10	2.50	2.50	1.00
							2011-04-13	2	1.50	3.00	2.50
		, A6002_sip (A6002_sip)	blue neutral	neutral	wide	neutral	2011-11-03	5	2.50	2.50	1.50
							2011-11-08	8	3.00	1.00	2.50
							2011-11-10	3	2.50	2.50	3.00
		, A6003_sip (A6003_sip)	) green (	positive	wide	positive	2011-04-11	6	1.00	1.50	2.50
							2011-04-13	2	2.50	0.00	1.00
							2011-11-03	4	1.50	3.00	2.50
							2011-11-08	7	0.00	2.50	1.50
							2011-11-10	3	3.00	1.00	2.50
			_sip) none neutral				2011-04-11	3	2.50	2.50	3.00
Environment	Voice			wide	positive	2011-04-13	2	1.00	1.50	2.50	
Littioiiiicit	*0100	, A6004_sip (A6004_sip)				2011-11-03	0	2.50	3.00	1.00	
						2011-11-08	2	1.50	2.50	2.50	
							2011-11-10	0	4.50	1.00	1.50
		, A6005_sip (A6005_sip)	blue	neutral	none	positive	2011-11-03	0	3.00	2.50	0.00
		,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,	Dide				2011-11-08	0	1.00	1.50	1.00

Use this report to view, for each agent and day, detailed information about average social media scores in each configured standard response, or category. The report includes averaged Sentiment, Influence, and Actionability scores.

#### HRCXIAgentSocialEngagementReport.pdf

The following tables explain the prompts you can select when you generate the report, and the metrics and attributes that are represented in the report:

## Prompts for the Agent Social Engagement Report

Prompt	Description
Pre-set Date Filter	Optionally, select a date on which to report.
Start Date	Choose the first day from which to gather report data.
End Date	Choose the last day from which to gather report data.
Agent Group	Optionally, select one or more groups from which to gather data for the report.
Agent	Optionally, select one or more agents from which to gather data for the report.
Category	Optionally, select one or more categories from which to gather data for the report.
Classify Sentiment Category	Optionally, select a value to filter the report based on customer sentiment; generally positive, negative, or neutral.
Classify Actionability Category	Optionally, select a value to filter the report based on the degree to which interactions require agent attention—their actionability.
Influence Category	Optionally, select a value to filter the report based on the customer's clout (amassed on social networks at the time that interactions entered or began within the contact center).
Media Type	Optionally, select the type of media to include in the report—for example, VOICE, EMAIL, and CHAT.
Tenant	For multi-tenant environments, optionally select the tenant(s) for which to include data in the report.

## Attributes used in the Agent Social Engagement Report

Attribute	Description
Tenant	This attribute enables data within the reporting interval to be organized by tenant.
Media Type	This attribute enables data to be organized by the interaction's media type—for example, VOICE, EMAIL, and CHAT.
Agent Name	This attribute enables data to be organized by certain attributes of the agent who is associated with the interaction.
Category	This attribute enables data to be organized by the standard responses to interactions that are configured in your environment.
Classify Sentiment Category	This attribute enables data to be organized by the

Attribute	Description
	characteristic of interactions that reflects the attitude expressed therein, generally positive, negative, or neutral.
Influence Category	This attribute enables data to be organized by the customer's clout that has amassed on social networks at the time that interactions entered or began within the contact center.
Classify Actionability Category	This attribute enables data to be organized by the characteristic of interactions that reflects the attitude expressed therein, generally positive, negative, or neutral.
Day	This attribute enables data within the reporting interval to be organized by a particular day within a month and year. Day values are presented in YYYY-MM-DD format.

# Metrics used in the Agent Social Engagement Report

Metric	Description
Accepted	<ul> <li>The description of this metric varies according to the attributes and filters in the report query:</li> <li>Agent Attribute: The total number of times that customer interactions or warm consultations were accepted, answered, pulled, or initiated by this agent.</li> <li>Agent Group Attribute: The total number of times that customer interactions or warm consultations were accepted, answered, pulled, or initiated by agents who belong to this agent group.</li> <li>Agent and Queue Attributes: The total number of times that customer interactions or warm consultations that were distributed from this queue were accepted, answered, pulled, or initiated by this agent.</li> </ul>
Avg Sentiment Score	<ul> <li>The description of this metric varies according to the attributes and filters in the report query:</li> <li>Agent Attribute: The average score reflecting the attitude expressed by customers for interactions that were handled by this agent.</li> <li>Agent Group Attribute: The average score reflecting the attitude expressed by customers for interactions that were handled by agents belonging to this agent group.</li> </ul>

Metric	Description
	Agent and Queue Attributes: The average score reflecting the attitude expressed by customers for interactions that were distributed from this queue and handled by this agent.  The average considers only those interactions for which a sentiment score was assigned.
Avg Influence Score	<ul> <li>The description of this metric varies according to the attributes and filters in the report query:</li> <li>Agent Attribute: The average score representing the clout amassed on social networks for interactions handled by this agent.</li> <li>Agent Group Attribute: The average score representing the clout amassed on social networks for interactions handled by agents belonging to this agent group.</li> <li>Agent and Queue Attributes: The average score representing the clout amassed on social networks for interactions that were distributed from this queue and handled by this agent.</li> <li>The average considers only those interactions for which an actionability score was assigned.</li> </ul>
Avg Actionability Score	<ul> <li>The description of this metric varies according to the attributes and filters in the report query:</li> <li>Agent Attribute: The average score, assigned to interactions that were handled by this agent, measuring the degree to which interactions required agent attention.</li> <li>Agent Group Attribute: The average score, assigned to interactions that were handled by agents belonging to this agent group, measuring the degree to which interactions required agent attention.</li> <li>Agent and Queue Attributes: The average score, assigned to interactions that were distributed from this queue and handled by this agent, measuring the degree to which interactions required agent attention.</li> <li>The average considers only those interactions for which an actionability score was assigned.</li> </ul>

# Agent State Details Report

This page describes how you can use the (**Agents** folder and **Details** folder) Agent State Details Report to learn more about how agents use their time when not in a call.

#### Understanding the Agent State Details Report

			Agent State	Details	Report				
Tenant	Media Type	Agent Name	Start Timestamp	State	Reason Timestamp	Reason Code	Duration (Fmt)	Reason Time (Fmt)	Activ
		4/11/2011 12:30:34 PM	Ready			00:00:20	00:00:00		
			4/11/2011 12:30:54 PM	Busy			00:03:35	00:00:00	
			4/11/2011 12:34:29 PM	Ready			00:06:09	00:00:00	
			4/11/2011 12:40:44 PM	Ready			00:00:11	00:00:00	
			4/11/2011 12:40:55 PM	Busy			00:03:45	00:00:00	
			4/11/2011 12:44:40 PM	Ready			00:00:09	00:00:00	
	4/11/2011 12:48:30 PM	Ready			00:00:10	00:00:00			
		4/11/2011 12:48:40 PM	Busy			00:03:01	00:00:00		
		, A6001_sip (A6001_sip)	4/11/2011 12:51:41 PM	Ready			00:00:07	00:00:00	
			4/11/2011 1:03:16 PM	Ready			00:00:06	00:00:00	
			4/11/2011 1:03:22 PM	Busy			00:01:02	00:00:00	
			4/11/2011 1:04:24 PM	Ready			00:01:34	00:00:00	
			4/11/2011 1:05:58 PM	Busy			00:01:16	00:00:00	
Environment Voice		4/11/2011 1:07:14 PM	Ready			00:01:16	00:00:00		
		4/11/2011 1:08:30 PM	Busy			00:00:56	00:00:00		
		4/11/2011 1:09:26 PM	Ready			00:00:09	00:00:00		
			4/11/2011 1:09:35 PM	NotReady			00:06:19	00:00:00	
			4/11/2011 12:31:09 Div	Ready			00:00:00	00:00:00	

This report displays the timestamps and durations of the various agent-state changes during a range of hours that you specify within a given day. This information enables supervisors to track how an agent spent his or her time in various non call-related states and to make assessments about how well this time was spent. If a hardware- or software-related reason was logged for any state, this reason also appears in the report.

Use this report for monitoring an agent's noncall-related activities, especially under those circumstances in which the agent is paid by the minute.

If the agent continues to be logged in over a two-day time span (or longer) and is not forcibly logged out by the system, state duration is split over each calendar day.

To get a better idea of what this report looks like, view sample output from the report:

#### SampleAgntStatReport.pdf

The following tables explain the prompts you can select when you generate the report, and the

metrics and attributes that are represented in the report:

## Prompts for the Agent State Details Report

Prompt	Description
Pre-set Day Filter	From the convenient list of predefined days, choose a day for which to run the report.
Report Date	Choose a day for which to run the report.
Agent Group	Optionally, select one or more groups from which to gather data for the report.
Agent	Optionally, select one or more agents from which to gather data for the report.
Reason Code Type	Optionally, select the reason code to include in the report.
Media Type	Optionally, select the type of media to include in the report—for example, VOICE, EMAIL, and CHAT.
Tenant	For multi-tenant environments, optionally select the tenant(s) for which to include data in the report.

## Attributes used in the Agent State Details Report

Attribute	Description
Tenant	This attribute enables data within the reporting interval to be organized by tenant.
Media Type	This attribute enables data to be organized by the interaction's media type—for example, VOICE, EMAIL, and CHAT.
Agent Name	This attribute enables data to be organized by certain attributes of the agent who is associated with the interaction.
Start Timestamp	This attribute enables data to be organized by the moment that the agent entered a specific state.
State	This attribute enables data within the reporting interval to be organized by the agent's state. Status values depend on the Genesys application (for example, Interaction Concentrator) that provides source data to Genesys Info Mart. For state values, refer to the description of this Info Mart table column in the Genesys Info Mart Physical Data Model documentation for your RDBMS (available from Genesys Info Mart documentation).
Reason Timestamp	This attribute enables data to be organized by the

Attribute	Description
	moment when the agent entered a specific state- reason combination.
Reason Code	This attribute enables data within the reporting interval to be organized by the reason that the agent selected.

#### Metrics used in the Agent State Details Report

Metric	Description
Duration (Fmt)	The difference (HH:MM:SS) between the beginning and end of the agent's state.
Reason Time (Fmt)	The total amount of time (HH:MM:SS) that this agent was in a specific state for a specific reason, irrespective of the interval(s) in which the state-reason combination endures. This time is measured from the moment at which the agent enters this state-reason combination to the moment at which the agent exits this state or state-reason combination. If the agent's state was still active when the data was compiled, the duration of the agent in this state appears as null in the reports.
Active	The Active column is a report variable based on the values of the Active Reason and Active State attributes.

For this report to provide reason codes that might be associated with an agent's state, your environment must configure hardware and/or software reason codes. When configured, one report instance will provide either hardware- or software-related reasons, but not both in the same report.

For this report to provide uninterrupted ACW and NotReady state details, you must appropriately configure the underlying ICON application supplying data to Genesys Info Mart (gls-enable-acw-busy). Refer to The SM\_RES\_STATE\_FACT Table section in the Genesys Info Mart User's Guide for special considerations regarding very short duration (>0 and <1 sec) states.

The Active column is a report variable based on the values of the Active Reason and Active State attributes.

# Agent Summary Activity Report (Active)

This page describes how you can use the (**Agents** folder) Agent Summary Activity Report (Active) to see detailed information about how each agent's active time was used.

### Understanding the Agent Summary Activity Report (Active)

					I	Agent Su	ımmary	Activit	y Repo	rt (Ac	tive)	١	
Tenant	Media Type	A	gent Name		Day	% Occupancy	Active Time (Fmt)	Ready Time (Fmt)	Not Ready Time (Fmt)	Busy Time (Fmt)	Wrap Tim (F	)	
		, A6001	_sip (A6001	_sip) 2	2011-04-11	57.15%	00:30:05	00:10:11	00:06:19	00:13:35	00:0		
		, A6002	_sip (A6002	2_sip) 2	2011-04-11	58.90%	00:25:45	00:08:14	00:05:43	00:11:48	00:00		
		, A6003	_sip (A6003	3_sip) 2	2011-04-11	55.29%	00:23:01	00:04:43	00:12:28	00:05:50	00:00:0	)	
Environment		ent Su	Active Time (Fmt)	Activ Ready Time (Fmt)	Not	Time (Emt)	Wrap Time (Fmt)	Other State Time (Fmt)	% Ready Time	% Not Ready Time	% Busy Time	% Wrap Time	% Other State Time
		57.15%	00:30:05	00:10:1	1 00:06	:19 00:13:35	00:00:00	00:00:	00 33.85%	21.00%	45.15%	0.00%	0.00%
		58.90%	00:25:45	00:08:1	4 00:05	:43 00:11:48	00:00:00	00:00:	00 31.97%	22.20%	45.83%	0.00%	0.00%
	)	55.29%	00:23:01	00:04:4	3 00:12	:28 00:05:50	00:00:00	00:00:	00 20.49%	54.16%	25.34%	0.00%	0.00%
		51.61%	00:08:49	00:04:1	6 00:00	:00 00:04:33	00:00:00	00:00:	00 48.39%	0.00%	51.61%	0.00%	0.00%
		99.73%	01:41:03	00:00:1	6 00:01	:10 01:39:37	7 00:00:00	00:00:	00 0.26%	1.15%	98.58%	0.00%	0.00%
		70.15%	00:01:50	00:00:2	0 00:00	:43 00:00:47	7 00:00:00	00:00:	00 18.18%	39.09%	42.73%	0.00%	0.00%
					00:01	:42 00:00:00	00:00.00			76%	0.00%	0.00%	0.00%

This report provides a breakdown of the duration of the different states that an agent can be in (Ready, Not Ready, Busy, and Other) for a specific media type, fully accounting for the agent's interaction time (time spent handling interactions). Use this report to understand how much of agent total active time was spent in each state, broken down by media type. The report tracks a wide range of metrics, broken down based on both the *amount* and *percentage* of active time spent in each state.

To get a better idea of what this report looks like, view sample output from the report: HRCXIAgentSummaryActivityReport(Active).pdf

The following tables explain the prompts you can select when you generate the report, and the metrics and attributes that are represented in the report:

## Prompts for the Agent Summary Activity Report (Active)

Prompt	Description
Pre-set Date Filter	Choose from the convenient list of predefined rolling time ranges, spanning one day or more, over which to run the report.
Start Date	Choose the first day from which to gather report data.
End Date	Choose the last day from which to gather report data.
Agent Group	Optionally, select one or more groups from which to gather data for the report.
Agent	Optionally, select one or more agents from which to gather data for the report.
Media Type	Optionally, select the type of media to include in the report—for example, VOICE, EMAIL, and CHAT.
Tenant	For multi-tenant environments, optionally select the tenant(s) for which to include data in the report.

## Attributes used in the Agent Summary Activity Report (Active)

Attribute	Description
Tenant	This attribute enables data within the reporting interval to be organized by tenant.
Media Type	This attribute enables data to be organized by the interaction's media type—for example, VOICE, EMAIL, and CHAT.
Agent Name	This attribute enables data to be organized by certain attributes of the agent who is associated with the interaction.
Day	This attribute enables data within the reporting interval to be organized by a particular day within a month and year. Day values are presented in YYYY-MM-DD format.

## Metrics used in the Agent Summary Activity Report (Active)

Metric	Description
% Occupancy	The percentage of time that this agent's state was Busy within the interval, relative to the total duration within the interval of the agent's active session on a particular media channel.

Metric	Description
	This metric reflects the percentage of time that agents actually spent handling interactions against their available or idle time. This metric is computed as active time minus ready and notready time divided by the difference of active and not-ready time.
Active Time (Fmt)	The total amount of time (HH:MM:SS) attributable to the interval between the beginning and end of this agent's login session(s) on a particular media channel. In the scenario in which an agent logs into multiple switches, DNs, and/or queues, this metric starts the moment at which the agent logs in to the first switch/DN/queue (if this login falls within the interval) and ends at the moment at which the agent is no longer logged in to any switch/ DN/ queue (if logout falls within the interval).  Note: If the agent is not forcibly logged out when the calendar day ends, login duration is split over both days.
Ready Time (Fmt)	The total amount of time (HH:MM:SS) that this agent was in the Ready state for a particular media type.
Not Ready Time (Fmt)	The total amount of time (HH:MM:SS) within the interval that this agent was in the NotReady state for a particular media channel (including Do Not Disturb duration, if configured) regardless of whether a reason was indicated.
Busy Time (Fmt)	The total duration (HH:MM:SS) of all of interaction- processing activities including the time that is associated with requests for consultation that the agent received and excluding the time spent processing after-call work.
Wrap Time (Fmt)	The total amount of time (HH:MM:SS) within the interval that this agent spent in ACW (Wrap) state whether or not the reason for entering this state was related to an interaction.
Other State Time (Fmt)	The total amount of time (HH:MM:SS) that the state of this agent was neither Ready nor NotReady after login to a particular media channel. The situation in which the state of an agent is neither Ready nor NotReady usually occurs upon first login if the switch, for instance, does not force agents into the Ready state upon login.
% Ready Time	The percentage of time within the interval that this agent's state was Ready, relative to the total duration within the interval of the agent's active session on a particular media channel.
% Not Ready Time	The percentage of time within the interval that this agent's state was NotReady, relative to the total duration within the interval of the agent's active session on a particular media channel.
% Busy Time	The percentage of time of all interaction-processing

Metric	Description
	activities.
% Wrap Time	The percentage of time that this agent spent in ACW (Wrap) state within the interval, relative to the total duration of the agent's active session within the interval.
% Other State Time	The percentage of the agent's time spent in a state other than those listed in the report.

# Agent Summary Activity Report (Interaction)

This page describes how you can use the (**Agents** folder) Agent Summary Activity Report (Interaction) to see detailed information about how much time agents spent on interactions.

### Understanding the Agent Summary Activity Report (Interaction)

enant	Media Type		Agent N	ame		Day	Interaction Typ	lxn Busy be Time (Fmt)	Invite Time (Fmt)	Engage Time (Fmt)	Tir	me	n Wrap Time (Fmt)
							Inbound	00:00:00	00:00:00	00:00:00	00:0	0:00	0:00:00
							INBOUND	00:00:00	00:00:00	00:00:00	00:0	0:00	0:00:00
2			20	17-02-08	Internal	00:00:00	00:00:00	00:00:00	00:0	0:00	0:00:00		
							Outbound	00:00:00	00:00:00	00:00:00	00:0	0:00	0:00:00
					Unknown	00:00:00	00:00:00	00:00:00	00:0	0:00	0:00:00		
		, ExampleUser1 (ExampleUser1)			Inb	nbound 00:00:	00:00:00	00:00 00:00:00	00:00:00	00:00:00	0:00	0:00:00	
					INBOUND	00:00:00	00:00:00	00:00:00	00:0	0:00	0:00:00		
Day	Interaction		Ixn Busy Time	Invite Time	Engage Time	Hold Time	raction)	Consult Received	% Invite	% Engage	% Hold	% lxn Wrap	% Consu
		,,	(Fmt)	(Fmt)	(Fmt)	(Fmt)	(Fmt)	Time (Fmt)	Time	Time	Time	Time	Time
	Inbound		00:00:00	00:00:00	00:00:00	00:00:00	00:00:00	00:00:00	0.00%	0.00%	0.00%	0.00%	0.0
/	INBOUND		00:00:00	00:00:00	00:00:00	00:00:00	00:00:00	00:00:00	0.00%	0.00%	0.00%	0.00%	0.0
2017-02-	08 Internal		00:00:00	00:00:00	00:00:00	00:00:00	00:00:00	00:00:00	0.00%	0.00%	0.00%	0.00%	0.0
	Outbound		00:00:00	00:00:00	00:00:00	00:00:00	00:00:00	00:00:00	0.00%	0.00%	0.00%	0.00%	0.0
	Unknown		00:00:00	00:00:00	00:00:00	00:00:00	00:00:00	00:00:00	0.00%	0.00%	0.00%	0.00%	0.0
	Inbound		00:00:00	00:00:00	00:00:00	00:00:00	00:00:00	00:00:00	0.00%	0.00%	0.00%	0.00%	0.0
\	INBOUND		00:00:00	00:00:00	00:00:00	00:00:00	00:00:00	00:00:00	0.00%	0.00%	0.00%	0.00%	0.0
2017-02-	10 Internal		00:00:00	00:00:00	00:00:00	00:00:00	00:00:00	00:00:00	0.00%	0.00%	0.00%	0.00%	0.0
}	Outbound		00:00:00	00:00:00	00:00:00	00:00:00	00:00:00	00:00:00	0.00%	0.00%	0.00%	0.00%	0.0
	Unknown		00:00:00	00:00:00	00:00:00	00:00:00	00:00:00	00:00:00	0.00%	0.00%	0.00%	0.00%	0.0
	Inbound		00:00:00	00:00:00	00:00:00	00:00:00		00:00:00	0.00%		0.00%	0.00%	0.0
2017-01-0	INBOUND		00:00:00	00:00:00	00:00:00	00:00:00		00:00:00	0.00%		0.00%	0.00%	0.0
			00:00:00	00:00:00	00:00:00	00:00:00		00:00:00	0.00%		0.00%	0.00%	0.0
	Outbound		00:00:00	00:00:00	00:00:00	00:00:00		00:00:00	0.00%		0.00%	0.00%	0.0
	Unknown		00:00:00	00:00:00	00:00:00	00:00:00		00:00:00	0.00%		0.00%	0.00%	0.0
	Inbound		00:00:00	00:00:00	00:00:00	00:00:00		00:00:00	0.00%		0.00%	0.00%	0.0
	INBOLIND		00:00:00	00:00:00	00:00:00	00:00:00	00:00:00	00:00:00	0.00%	0.00%	0.00%	0.00%	0.0

This report provides a breakdown of the duration of the different states that an agent can be in (Ready, Not Ready, Busy, and Other) for a specific media type, fully accounting for the agent's interaction time (time spent handling interactions). The report breaks down the agent's time based on how much active time is spent processing interactions, and also shows each value as a percentage of active time.

Use this report to understand how much of agent interaction time was spent in each state. The report tracks a wide range of metrics, broken down based on both the *amount* and *percentage* of interaction time spent in each state.

This report shows data only about interactions that occur at agent DNs during active sessions, and about the status of DNs associated with active agent sessions. To expand the report to include interactions that occur at DNs not associated with the agent, and the status of DNs not associated with the agent, contact your Genesys representative.

To get a better idea of what this report looks like, view sample output from the report: HRCXIAgentSummaryActivityReport(Interaction).pdf

The following tables explain the prompts you can select when you generate the report, and the metrics and attributes that are represented in the report:

### Prompts for the Agent Summary Activity Report (Interaction)

Prompt	Description
Pre-set Date Filter	Choose from the convenient list of predefined rolling time ranges, spanning one day or more, over which to run the report.
Start Date	Choose the first day from which to gather report data.
End Date	Choose the last day from which to gather report data.
Agent Group	Optionally, select one or more groups from which to gather data for the report.
Agent	Optionally, select one or more agents from which to gather data for the report.
Media Type	Optionally, select the type of media to include in the report—for example, VOICE, EMAIL, and CHAT.
Interaction Type	Optionally, select the type of interaction to include in the report—for example, Inbound, Outbound, and Internal.
Tenant	For multi-tenant environments, optionally select the tenant(s) for which to include data in the report.

# Attributes used in the Agent Summary Activity Report (Interaction)

Attribute	Description
Tenant	This attribute enables data within the reporting interval to be organized by tenant.
Media Type	This attribute enables data to be organized by the interaction's media type—for example, VOICE, EMAIL, and CHAT.

Attribute	Description
Agent Name	This attribute enables data to be organized by certain attributes of the agent who is associated with the interaction.
Day	This attribute enables data within the reporting interval to be organized by a particular day within a month and year. Day values are presented in YYYY-MM-DD format.
Interaction Type	This attribute enables data to be organized by the interaction's type—for example, Inbound, Outbound, and Internal.

## Metrics used in the Agent Summary Activity Report (Interaction)

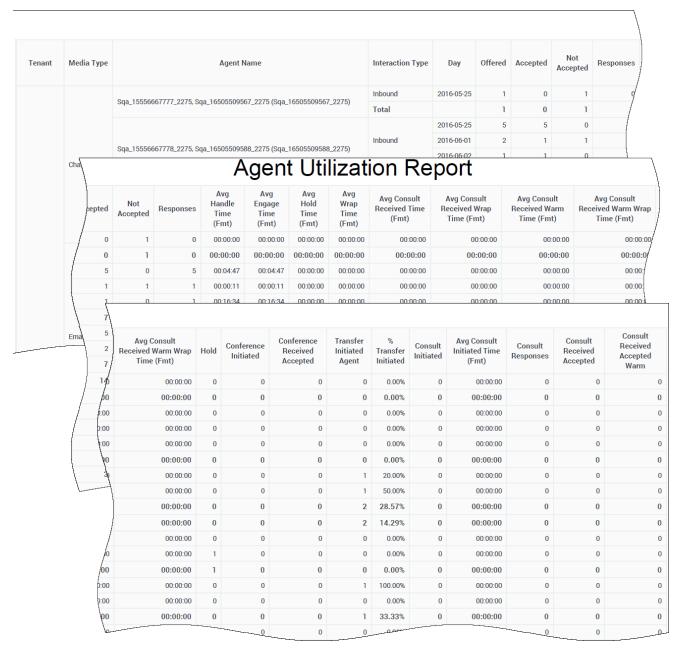
Metric	Description		
Ixn Busy Time (Fmt)	The total amount of time (HH:MM:SS) within the interval that this agent was busy processing interactions. The time that an agent is busy is calculated as the sum of dialing for established interactions and alerting duration (Invite Time), engage/talk duration, hold duration, ACW (Wrap) duration (for interaction-related ACW), and amount of time that the agent spent processing consult interactions that the agent received. This metric excludes Ringing Time, Consult Ixn Wrap Time, Consult Invite Time, and Invite Time for Abandoned Inviting.		
Invite Time (Fmt)	The total amount of time (HH:MM:SS) attributable to the interval that customer interactions alerted or rang at agents plus the total duration of the dialing that agents performed. For the alerting component of this metric, interactions do not have to be established for this metric to be incremented. For the dialing component, dial duration is measured for established calls only.		
Engage Time (Fmt)	The total amount of time (HH:MM:SS) that this agent was engaged with customers on interactions that the agent received within the interval or within a prior interval and ensued in this interval. This metric might include engagement time for interactions that the agent made or received while in the Not Ready or ACW (Wrap) states (if the underlying ICON application supplying data to Genesys Info Mart is configured appropriately.) This metric excludes engagement time that is associated with collaborations, consultations, and other interaction-related durations, such as hold time, ACW time, and alert (ring) time.		
Hold Time (Fmt)	The total amount of time (HH:MM:SS) within the interval that this agent had customer interactions		

Metric	Description
	on hold. This metric counts all held durations for interactions, whether they were placed on hold once or more than once.
Ixn Wrap Time (Fmt)	The total amount of time (HH:MM:SS) within the interval that this agent spent in ACW (Wrap) state for customer calls that the agent received.
Consult Received Time (Fmt)	The total amount of time (HH:MM:SS) within the interval that this agent as a recipient spent in collaborations or consultations, where the collaborations/consultations were associated with customer interactions. This time includes any hold duration that occurred within the interval and during the collaboration/consultation.
% Invite Time	The percentage of time that customer interactions spent in Invite Time, relative to the total duration of the agent's active session within the interval.
% Engage Time	The percentage of time within the interval that this agent was engaged with customers, relative to the total duration within the interval of the agent's active session on a particular media channel.
% Hold Time	The percentage of time that this agent had customer interactions on hold within the interval, relative to the total duration of the agent's active session within the interval.
% Ixn Wrap Time	The percentage of time within the interval that this agent spent in ACW (Wrap) state related to customer calls, relative to the total duration of the agent's active session within the interval.
% Consult Received Time	The percentage of time within the interval that this agent spent on collaborations or consult interactions that the agent received, relative to the total duration within the interval of this agent's active session on a particular media channel.

# Agent Utilization Report

This page describes how you can use the (**Agents** folder) Agent Utilization Report to see detailed information about agent time utilization.

### Understanding the Agent Utilization Report



This report provides detailed information about agent performance with respect to the customer and consults interactions that are processed within the contact center for a range of days that you specify, and illustrates the percentage of interactions accepted by agents. Metrics include the total number of interactions that were offered or accepted, the number and percentage that were subsequently transferred, consult times, and so on. The report includes interactions from a mediation DN object and those directly routed from a switch.

Use this report to understand how agents perform on a daily basis by analyzing interaction volumes,

call times, and consult data.

To get a better idea of what this report looks like, view sample output from the report: HRCXIAgentUtilizationReport.pdf

The following tables explain the prompts you can select when you generate the report, and the metrics and attributes that are represented in the report:

### Prompts for the Agent Utilization Report

Prompt	Description
Pre-set Date Filter	Choose from the convenient list of predefined rolling time ranges, spanning one day or more, over which to run the report.
Start Date	Choose the first day from which to gather report data.
End Date	Choose the last day from which to gather report data.
Agent Group	Optionally, select one or more groups from which to gather data for the report.
Agent	Optionally, select one or more agents from which to gather data for the report.
Media Type	Optionally, select the type of media to include in the report—for example, VOICE, EMAIL, and CHAT.
Interaction Type	Optionally, select the type of interaction to include in the report—for example, Inbound, Outbound, and Internal.
Tenant	For multi-tenant environments, optionally select the tenant(s) for which to include data in the report.

### Attributes used in the Agent Utilization Report

Attribute	Description
Tenant	This attribute enables data within the reporting interval to be organized by tenant.
Media Type	This attribute enables data to be organized by the interaction's media type—for example, VOICE, EMAIL, and CHAT.
Agent Name	This attribute enables data to be organized by certain attributes of the agent who is associated with the interaction.
Interaction Type	This attribute enables data to be organized by the interaction's type—for example, Inbound,

Attribute	Description
	Outbound, and Internal.
Day	This attribute enables data within the reporting interval to be organized by a particular day within a month and year. Day values are presented in YYYY-MM-DD format.

## Metrics used in the Agent Utilization Report

Metric	Description
	The total number of times that interactions were received or initiated by an agent.
Offered	The count includes interactions that were abandoned while inviting, handling attempts that the agent rejected, and warm consultations and conferences that the agent received. This count excludes simple consultations, whether they were initiated or received. For AG2_AGENT_QUEUE records, this metric relies on the value of the short-abandoned threshold option as configured in the [agg-gim-thld-ID-IXN] section.
	The description of this metric varies according to the attributes and filters in the report query:
Accepted	<ul> <li>The total number of times that customer interactions or warm consultations were accepted, answered, pulled, or initiated by this agent.</li> </ul>
	For voice media, this metric is identical to Activity\Responses.
Not Accepted	The total number of times that customer interactions were redirected to another resource upon no answer by this agent or were otherwise not accepted by this agent.
	This metric includes interactions that the customer abandoned while they were alerting at the agent.
Responses	For voice and chat media, this metric represents the total number of times that customer interactions or warm consultations were accepted by this agent. For email, this metric represents the total number of times that the agent prepared an outbound reply.
	For voice media, this metric is identical to Activity\Accepted; it returns positive values when agents initiate calls.
Avg Handle Time (Fmt)	The average amount of time (HH:MM:SS) that this agent spent handling interactions that the agent received.
	This metric is computed as handle time divided by the sum of

Metric	Description
	accepted interactions and received consultations.
Avg Engage Time (Fmt)	The average amount of time (HH:MM:SS) that this agent was engaged with customers.
	The average amount of time (HH:MM:SS) that this agent had customer interactions on hold.
Avg Hold Time (Fmt)	This metric is attributed to the interval in which interactions arrived at the agent (which can differ from the interval in which the interactions were placed on hold).
Avg Wrap Time (Fmt)	The average amount of time (HH:MM:SS) that this agent spent on customer interactions while in ACW (Wrap) state.
Avg Consult Received Time (Fmt)	The average amount of time (HH:MM:SS) that this agent was engaged on collaborations or simple consultations that the agent received, where the collaborations/consultations were associated with customer interactions.
Avg Consult Received Wrap Time (Fmt)	The average amount of time (HH:MM:SS) that this agent was in ACW (Wrap) state following simple consultations that the agent accepted, where the consultations were associated with customer calls.
Avg Consult Received Wrap Time (Fint)	This duration does not stop if the agents received or made calls while in ACW state. This metric is attributed to the interval in which this agent was offered the consult interaction for which ACW was invoked.
Avg Consult Received Warm Time (Fmt)	The average amount of time (HH:MM:SS) that this agent was engaged as a recipient in collaborations or consultations, including related hold durations, where the collaborations/consultations were associated with customer interactions.
	This metric is attributed to the interval in which the consult interaction is offered to the receiving agent. This metric excludes alert (ring) and ACW (Wrap) durations associated with the consult interactions.
Avg Consult Received Warm Wrap Time (Fmt)	The average amount of time (HH:MM:SS) that this agent spent in ACW (Wrap) state following consultations that the agent requested and received, where the consultations were associated with customer interactions that were transferred to or conferenced with this agent.  This metric includes:
And consult received warm wrap time (time)	<ul> <li>ACW durations that were associated with conferences where the customer leaves the interaction.</li> </ul>
	<ul> <li>Internal interactions that were transferred to the agent.</li> </ul>

Metric	Description
Hold	The total number of customer interactions that this agent had on hold.
Conference Initiated	The total number of times that this agent initiated conferences for customer interactions that the agent received, where the conferences were established.
	The count includes the number of established conferences that were initiated for transferred interactions that the agent received.
Conference Received Accepted	The total number of times that this agent joined conferences to participate in customer interactions.
Transfer Initiated Agent	The total number of times that this agent transferred customer interactions.
general manager general	Both warm and blind transfers are reflected in this metric.
% Transfer Initiated	The percentage of accepted customer interactions that were transferred (warm or blind) by this agent.
Consult Initiated	The total number of times that this agent initiated requests for collaboration or simple consultation, where the collaborations/consultations were established and associated with customer interactions.
Avg Consult Initiated Time (Fmt)	The average amount of time (HH:MM:SS) that this agent was engaged on collaborations or simple consult interactions that the agent initiated, where the collaborations/consultations were associated with customer interactions.
	For email, the total number of collaboration replies that were initiated by this agent.
Consult Responses	For voice, this metric is the same as Activity\Consult Received Accepted.
Consult Received Accepted	The total number of times that this agent received and accepted collaborations or simple consultations that were associated with customer interactions.
Consult Received Accepted Warm	The total number of times that this agent participated in consultations that the agent received, where the consultations were associated with customer interactions that were transferred to or conferenced with the agent.

# Agent Wrap Report

This page describes how you can use the (**Agents** folder) Agent Wrap Report to learn more about agent performance, including detailed call handling information for each agent.

### Understanding the Agent Wrap Report

						Age	ent Wra	ap Rej	port	
Tenant	Age	nt Name	Inte	raction	n Type	Hour	T	tive ime 'mt)	Wrag Tim (Fm)	
			T 1			2011-04-11	12 00:	17:27	00:0	
				Inbound		2011-04-11	13 00:	12:38	00:0	
	\gent	Wrap Re	port						1	
	, A6	Active Time (Fmt)	Wrap Time (Fmt)	% Wrap Time	Wrap In	Wrap In Time (Fmt)	% Wrap In Time	Wrap Out	Wrap Out Time (Fmt)	% Wrap Out Time
	-11 12	00:17:27	00:00:00	0.00%		00:00:00	0.00%		00:00:00	0.00%
	-11 13	00:12:38	00:00:00	0.00%		00:00:00	0.00%		00:00:00	0.00%
	11 12	00:17:27	00:00:00	0.00%	0	00:00:00	0.00%	0	00:00:00	0.00%
	1 13	00:12:38	00:00:00	0.00%	0	00:00:00	0.00%	0	00:00:00	0.00%
	1 12	00:17:27	00:00:00	0.00%		00:00:00	0.00%		00:00:00	0.00%
	1 13	00:12:38	00:00:00	0.00%		00:00:00	0.00%		00:00:00	0.00%
	11 12	00:17:27	00:00:00	0.00%		00:00:00	0.00%		00:00:00	0.00%
	-11 13	00:12:38	00:00:00	0.00%		00:00:00	0.00%		00:00:00	0.00%
	-11 12	00:13:42	00:00:00	0.00%		00:00:00	0.00%		00:00:00	0.00%
	2.0			0.00%					00:00:00	0,002

This report enables supervisors to monitor the after-call work (wrap) call-related activities that an agent (or agent group) performs after processing calls and during a range of hours that you specify within a particular day. This report displays a roll-up of data that is related to the number, duration, and percentage of calls that were made and received while the DNs that are associated with the agent were in ACW state (WORKMODE=WRAP).

This report does not apply to media types other than voice.

The Wrap In and Wrap Out percentage metrics relate to the overall ACW duration for all activities—both call- and noncall-related—not to the duration of the agent's login session. Measurements do not differentiate between whether interactions are routed directly from a switch or

via a mediation DN.

This report is especially useful for viewing the progress of new agents as they make more (or fewer) calls to complete aftercall work than more established agents. With this data, you can determine whether you need to fine-tune Genesys Info Mart configuration to, for instance, send more information about a customer (that is, attached data) to the agent's desktop.

This report shows data only about interactions that occur at agent DNs during active sessions, and about the status of DNs associated with active agent sessions. To expand the report to include interactions that occur at DNs not associated with the agent, and the status of DNs not associated with the agent, contact your Genesys representative.

To get a better idea of what this report looks like, view sample output from the report: SampleAgentWrapReport.pdf

The following tables explain the prompts you can select when you generate the report, and the metrics and attributes that are represented in the report:

### Prompts for the Agent Wrap Report

Prompt	Description
Pre-set Day Filter	Choose from the convenient list of predefined days, select one over which to run the report.
Report Date	Choose the day from which to gather report data.
Agent Group	Optionally, select one or more groups from which to gather data for the report.
Agent	Optionally, select one or more agents to include in the report.
Interaction Type	Optionally, select the type of interaction to include in the report—for example, Inbound, Outbound, and Internal.
Tenant	For multi-tenant environments, optionally select the tenant(s) for which to include data in the report.

### Attributes used in the Agent Wrap Report

Attribute	Description
Tenant	This attribute enables data within the reporting interval to be organized by tenant.
Agent Name	This attribute enables data to be organized by certain attributes of the agent who is associated with the interaction.
Interaction Type	This attribute enables data to be organized by the interaction's type—for example, Inbound,

Attribute	Description
	Outbound, and Internal.
Hour	This attribute enables data within the reporting interval to be organized by a particular hour within a day. Hour values are presented in YYYY-MM-DD-HH24 format.

## Metrics used in the Agent Wrap Report

Metric	Description
Active Time (Fmt)	The total amount of time, in seconds, attributable to the interval between the beginning and end of this agent's login session(s) on a particular media channel. In the scenario in which an agent logs into multiple switches, DNs, and/or queues, this metric starts at the moment at which the agent logs in to the first switch/DN/queue (if this login falls within the interval) and ends at the moment at which the agent is no longer logged in to any switch/DN/queue (if logout falls within the interval).  If the agent is not forcibly logged out when the calendar day ends, login duration is split over both days.
Wrap Time (Fmt)	The total amount of time (HH:MM:SS) within the interval that this agent spent in ACW (Wrap) state, whether or not the reason for entering this state was related to an interaction.
% Wrap Time	The percentage of time that this agent spent in ACW (Wrap) state within the interval, relative to the total duration of the agent's active session within the interval.
Wrap In	The total number of times that this agent received customer calls while in ACW (Wrap) state.
Wrap In Time (Fmt)	The total amount of time (HH:MM:SS) that this agent spent handling customer calls that the agent answered while in ACW (Wrap) state. This duration includes alert (ring) time, hold time, and time of engagement.
% Wrap In Time	The percentage of time that this agent spent on customer interactions received within the interval while the agent DNs were in ACW (Wrap) state, relative to the DN's total ACW state duration within the interval.
Wrap Out	The total number of times that this agent placed calls while in ACW (Wrap) state. Consultations that the agent participated in while in ACW state are excluded from this metric.

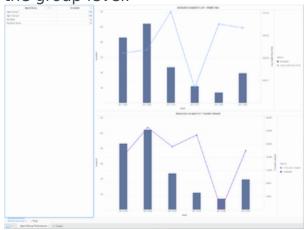
Metric	Description
Wrap Out Time (Fmt)	The total amount of time (HH:MM:SS) that this agent spent handling internal or outbound interactions that the agent initiated while in ACW (Wrap) state. This duration includes dial time, hold time, and time of engagement and excludes consultations that the agent participated in while in ACW state.
% Wrap Out Time	The percentage of time that this agent spent on customer interactions that the agent dialed within the interval while the agent's DNs were in ACW (Wrap) state, relative to the DNs' total duration in the ACW summarized state within the interval.

This report provides meaningful data for the Wrap In and Wrap Out metrics only if the ICON application supplying data to the Info Mart database is configured to recognize uninterrupted ACW and NotReady states (**gls-enable-acw-busy**).

Although this report allows you to drill beyond day-level aggregation, drill-up / drill-down results are supported only for subhour-hour-to-day or day-to-hour-subhour operations.

# Weekly Agent Group Performance Dashboard

The (**Dashboards** and **Agents** folders) Weekly Agent Group Performance Dashboard provides visualizations that illustrate weekly interaction handling at the group level.



Weekly Agent Group Performance Dashboard

### Understanding the Weekly Agent Group Performance Dashboard

The Weekly Agent Group Performance Dashboard provides two views that you can use to monitor the interaction processing performance of agent groups:

- Interaction Accepted Vs AHT Weekly View Charts the number of Interactions Accepted against the Average Handle Time for the selected groups.
- Interaction Accepted Vs % Transfers Initiated Charts the number of Interactions Accepted against the percentage of interactions that were transferred from the selected groups.

The report shows data for all the groups, or for the ones you select on the prompts page. Once you have run the report, you can make a selection in the Agent Group / Accepted list to dynamically focus on a specific group. To get a better idea of what this dashboard looks like, view sample output from the dashboard:

#### Sample Weekly Agent Group Performance Dashboard

#### Link to video

The following tables explain the prompts you can select when you generate the dashboard, and the metrics and attributes that are represented in the dashboard:

# Prompts available for the Weekly Agent Group Performance Dashboard

The following table describes prompts available for the the Weekly Agent Group Performance Dashboard:

Prompt	Description
Pre-set Date Filter	From the convenient list of predefined dates, choose a date for which to run the report.
Start Date	Choose the first day from which to gather data into the dashboard.
End Date	Choose the last day from which to gather data into the dashboard.
Agent Group	Optionally, select one or more agent groups on which to focus the report.
Media Type	Optionally, select one or more media types to include in the report—for example, VOICE, EMAIL, and CHAT.
Interaction Type	Optionally, select the type of interaction to include in the report—for example, Inbound, Outbound, and Internal.
Tenant	For multi-tenant environments, optionally select one or more tenants on which to focus the report.

### Attributes used in the Weekly Agent Group Performance Dashboard

The following table describes attributes used on the Weekly Agent Group Performance Dashboard:

Attribute	Description
Agent Group	Click values in this column to focus the report on specific groups.
Week	Enables data within the reporting interval to be organized by a particular week (1-53).

### Metrics used in the Weekly Agent Group Performance Dashboard

The following table describes metrics used on the Weekly Agent Group Performance Dashboard:

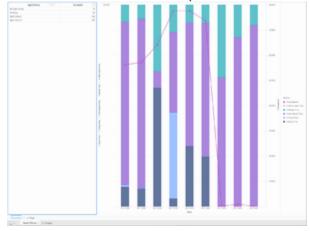
Metric	Description
Accepted	The total number of times that customer

Metric	Description
	interactions or warm consultations were accepted, answered, pulled, or initiated by agents who belong to this agent group.
Avg Handle Time (Fmt)	The average amount of time, in seconds, that agents who belong to this agent group spent handling interactions that the agents received.  This metric is computed as handle time divided by the sum of accepted interactions and received consultations.
% Transfer Initiated	The percentage of accepted customer interactions

To view more detailed information about the metrics and attributes in this dashboard, and other metrics and attributes that can be used to customize reports, see the *Genesys CX Insights Projects Reference Guide*.

# Weekly Agent Group Utilization Dashboard

The (**Dashboards** and **Agents** folders) Weekly Agent Group Utilization Dashboard provides visualizations you can use to understand how much of agent total active time was spent in each state.



Weekly Agent Group Utilization Dashboard

### Understanding the Weekly Agent Group Utilization Dashboard

The Weekly Agent Group Utilization Dashboard charts agent occupancy against a breakdown of the duration of the different states that an agent can be in (Ready, Not Ready, Busy, Other, and Wrap) as percentages, fully accounting for the interaction time (time spent handling interactions) for the agents in the group.

To get a better idea of what this dashboard looks like, view sample output from the dashboard:

SampleWeekly Agent Group Utilization Dashboard .pdf

#### Link to video

The following tables explain the prompts you can select when you generate the dashboard, and the metrics and attributes that are represented in the dashboard:

# Prompts available for the Weekly Agent Group Utilization Dashboard

The following table lists the prompts available for the Weekly Agent Group Utilization Dashboard:

Prompt	Description
Pre-set Date Filter	From the convenient list of predefined dates, choose a date for which to run the report.
Start Date	Choose the first day from which to gather data into the dashboard.
End Date	Choose the last day from which to gather data into the dashboard.
Agent Group	Optionally, select one or more agent groups on which to focus the report.
Media Type	Optionally, select one or more media types to include in the report—for example, VOICE, EMAIL, and CHAT.
Interaction Type	Optionally, select the type of interaction to include in the report—for example, Inbound, Outbound, and Internal.
Tenant	For multi-tenant environments, optionally select one or more tenants on which to focus the report.

### Attributes used on the Weekly Agent Group Utilization Dashboard

The following table lists the attributes used on the Weekly Agent Group Utilization Dashboard:

Attribute	Description
Agent Group	Click values in this column to focus the report on specific groups.
Week	Enables data within the reporting interval to be organized by a particular week (1-53).

### Metrics used on the Weekly Agent Group Utilization Dashboard

The following table lists the metrics used on the Weekly Agent Group Utilization Dashboard:

Metric	Description		
Accepted	The total number of times that customer interactions or warm consultations were accepted, answered, pulled, or initiated by agents who belong to this agent group.		
% Occupancy	The percentage of time that this agent's state was Busy within the interval, relative to the total duration within the interval of the agent's active session on a particular media channel.  This metric reflects the percentage of time that agents actually spent handling interactions against their available or idle time.		

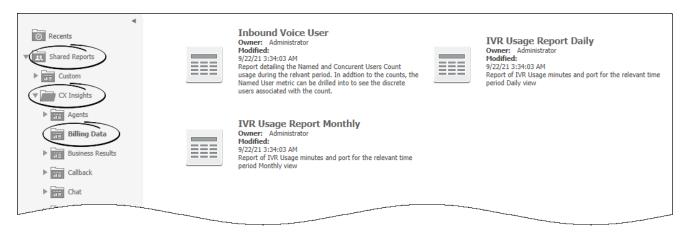
Metric	Description
	This metric is computed as active time minus ready and not- ready time divided by the difference of active and not-ready time.
% Other State Time	The percentage of the agent's time spent in a state other than those listed in the report.
% Ready Time	The percentage of time within the interval that this agent's state was Ready, relative to the total duration within the interval of the agent's active session on a particular media channel.
% Not Ready Time	The percentage of time within the interval that this agent's state was NotReady, relative to the total duration within the interval of the agent's active session on a particular media channel.
% Wrap Time	The percentage of time that this agent spent in ACW (Wrap) state within the interval, relative to the total duration of the agent's active session within the interval.
% Busy Time	The percentage of time of all interaction-processing activities.

To view more detailed information about the metrics and attributes in this dashboard, and other metrics and attributes that can be used to customize reports, see the *Genesys CX Insights Projects Reference Guide*.

# Billing Data reports

This page describes reports you can use to learn more about customer billing data.

### About Billing Data reports



The following reports are available in the **CX Insights** > **Billing Data** folder:

- Inbound Voice User
- IVR Usage Report

#### **Related Topics**:

- · Go back to the complete list of available reports.
- Learn how to understand and use reports.
- · Learn how to create or customize reports.

# Inbound Voice Report

View information about Named and Concurrent Users Count usage.

### Understanding the Inbound Voice User Report

Inbound Voice User			
Day	Named User Count	Concurrent User Count	
2021-06-14	0	0	
2021-06-15	0	0	
2021-06-16	0	0	
2021-06-17	0	0	
2021-06-18	0	0	
2021-06-19	1	1	
2021-06-20	3	2	
2021-06-21	3	2	

This report provides detailed information about the Named and Concurrent Users Count usage during the selected period. You can drill on the Named User metric to see the discrete users associated with the count.

To get a better idea of what this report looks like, view sample output from the report: SampleInboundVoiceUserReport.pdf

The following tables explain the prompts you can select when you generate the report, and the metrics and attributes that are represented in the report:

### Prompts for the Inbound Voice User Report

Prompt	Description
Pre-set Day Filter	Choose from the convenient list of predefined rolling time ranges, spanning one day or more, over which to run the report.
Start Date	Choose the first day from which to gather data into the report.
End Date	Choose the last day from which to gather data into the report.

## Attributes in the Inbound Voice User Report

Attribute	Description		
Day	This attribute enables data within the reporting interval to be organized by a particular day.		
Region	This attribute enables data within the reporting interval to be organized based on the geographic classification of the call. Possible values include: us, eu, ap.		
Business Unit	This attribute enables data within the reporting interval to be organized based on business unit.		

### Metrics in the Inbound Voice User Report

Metric	Description
Named User Count	The number of agents that logged in for a voice media type at least once during the selected month. This value represents a running total of the number of agents who logged in since the beginning of the calendar month. It resets at the beginning of each month.
Concurrent User Count	The peak number of unique agents that were concurrently logged in for a voice media type, during the selected period. Note that, if you run the report over a single day, this value shows you the highest value for that day. If you run the report over a longer period, (month, quarter, year) represents the maximum daily peak within the interval.

To view more detailed information about the metrics and attributes in this report, and other metrics and attributes that can be used to customize reports, see the *Genesys CX Insights 9.0 Projects Reference Guide*.

# IVR Usage Report

View information about Genesys Voice Platform (GVP) usage, as represented by daily and monthly totals of IVR Minutes and IVR Ports.

### Understanding the IVR Usage Report

### IVR Usage Report Daily

Day	IVR Minutes (Fmt)	Peak IVR Ports
2021-06-14	00:00:23	1
2021-06-15	00:00:28	1
2021-06-16	00:00:11	1
2021-06-17	00:00:51	1
2021-06-18	00:00:34	2
2021-06-19	00:00:41	2
2021-06-20	00:00:25	4
2021-06-21	00:00:46	6
2021-06-22	00:00:45	6
2021-06-23	00:00:50	6
2021-06-24	00:00:31	6
2021-06-25	00:00:39	6
	00:00:54	6

### IVR Usage Report Monthly

Month	IVR Minutes (Fmt)	Peak IVR Ports	
2021-06	00:10:30	10	
2021-07	00:19:17	28	
2021-08	00:07:55	8	
Total	00:37:42	28	

This report is available in two versions: Daily and Monthly. If you have enabled the BDS metrics for GVP minutes or ports (gvp\_minutes and gvp\_ports), these reports provide summary information about Designer usage details tied to these metrics, over the indicated time period.

To get a better idea of what this report looks like, view sample output from the report:

- SampleIVRUsageReportDaily.pdf
- · SampleIVRUsageReportMonthly.pdf

The following tables explain the prompts you can select when you generate the report, and the metrics and attributes that are represented in the report:

### Prompts for the IVR Usage Report

Prompt	Description		
Pre-set Day Filter	Choose from the convenient list of predefined rolling time ranges, spanning one day or more, over which to run the report.		
Start Date	Choose the first day from which to gather data into the report.		
End Date	Choose the last day from which to gather data into the report.		

### Attributes in the IVR Usage Report

Attribute	Description		
Day (Appears only on the Daily report)	This attribute enables data within the reporting interval to be organized by a particular day.		
Month (Appears only on the Monthly report)	This attribute enables data within the reporting interval to be organized by a particular month.		
Region (Does not appear in the report by default, but you can add it if desired.)	This attribute enables data within the reporting interval to be organized based on the geographic classification of the call. Possible values include: us, eu, ap.		
Business Unit (Does not appear in the report by default, but you can add it if desired.)	This attribute enables data within the reporting interval to be organized based on business unit.		

### Metrics in the IVR Usage Report

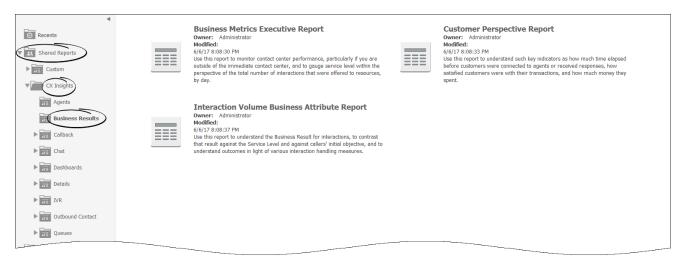
Metric	Description		
IVR Minutes (Fmt)	The total number of minutes for all self-service applications used by GVP, for the specified tenant. This metric includes time spent in queue.		
Peak IVR Ports	Peak usage of GVP treatment applied to calls within GVP, for the specified tenant.		

To view more detailed information about the metrics and attributes in this report, and other metrics and attributes that can be used to customize reports, see the *Genesys CX Insights 9.0 Projects*\*Reference Guide\*. For information about how to customize reports, see Customizing reports.

# Business Results reports

This page describes reports you can use to learn more about the business outcomes resulting from activity in your contact center. The reports in the **Business Results** folder are ready-to-use, but as always, can be modified to suit your specific business needs.

### About Business Results reports



The following reports are available in the **CX Insights** > **Business Results** folder:

- Business Metrics Executive Report
- Customer Perspective Report
- Interaction Volume Business Attribute Report
- Weekly Business Attribute Dashboard

#### **Related Topics:**

- Go back to the complete list of available reports.
- Learn how to understand and use reports.
- Learn how to create or customize reports.

# Business Metrics Executive Report

This page describes how you can use the (**Business Results** folder) Business Metrics Executive Report to review adherence to service level.

### Understanding the Business Metrics Executive Report

			Business Me	trics Executive Repo	ort		
Tenant	Media Type	Business Result	Customer Segment	Service Type	Day	% First Response Time Service Level	Entered with Objective
					2016-05-25	80.00%	5
					2016-05-26	0.00%	1
					2016-05-27	0.00%	2
			Chat_CS	Chat_ST	2016-06-01	50.00%	2
					2016-06-02	0.00%	1
	Chat	DEFAULT_BUSINESS_RESULT			2016-06-08	50.00%	2
					2016-06-13	0.00%	5
					2016-05-25	0.00%	1
			default	default	2016-05-27	0.00%	5
			deladit	deradit	2016-06-02	0.00%	1
					2016-06-08	0.00%	1
			default	default	2016-06-01	100.00%	1
			DEFAULT_CUSTOMER_SEGMENT	DEFAULT_SERVICE_TYPE	2016-06-13	0.00%	2
Environment					2016-05-25	25.00%	4
Environment	Email	DEFAULT_BUSINESS_RESULT	T Email_CS	Email_ST	2016-05-26	0.00%	3
					2016-06-01	100.00%	1
					2016-06-02	0.00%	1
					2016-06-07	0.00%	3
					2016-05-25	93.94%	99
Voice DEF/				2016-05-26	97.22%	36	
		oice DEFAULT_BUSINESS_RESULT	default	default	2016-05-27	95.00%	60
					2016-05-30	96.97%	33
	Maia				2016-05-31	93.33%	30
	Voice				2016-06-01	100.00%	4
				2016-06-02	100.00%	3	
				2016-06-03	100.00%	1	
		and the same of th			2016-06-06	50.00%	2

This report highlights exceptions to service level by business result, customer segment, and service type for those interactions that have defined a baseline service objective that is greater than zero (0).

The *Entered with Objective* metric enables you to gauge service level within the perspective of the total number of interactions that were offered to resources, by day, over the reporting interval.

Use this report to monitor contact center performance, particularly if you are outside of the immediate contact center, and to gauge service level within the perspective of the total number of interactions that were offered to resources, by day.

To get a better idea of what this report looks like, view sample output from the report: HRCXIBusinessMetricsExecutiveReport.pdf

The background color of data cells in this report serve to alert you to values that are outside of configured threshold ranges.

The following tables explain the prompts you can select when you generate the report, and the metrics and attributes that are represented in the report:

### Prompts for the Business Metrics Executive Report

Prompt	Description
Pre-set Date Filter	From the list, choose a time period on which to report, and move it to the Selected list.
Start Date	Choose the first day from which to gather report data.
End Date	Choose the last day from which to gather report data.
Business Result	Optionally, select a configured Business Result on which to report.
Customer Segment	Optionally, select a configured Customer Segment on which to report.
Service Type	Optionally, select the type of service to include in the report.
Media Type	Optionally, select the type of media to include in the report—for example, VOICE, EMAIL, and CHAT.
Interaction Type	Optionally, select the type of interaction to include in the report—for example, Inbound, Outbound, and Internal.
Tenant	For multi-tenant environments, optionally select the tenant(s) for which to include data in the report.

### Attributes used in the Business Metrics Executive Report

Attribute	Description
Tenant	This attribute enables data within the reporting interval to be organized by tenant.
Media Type	This attribute enables data to be organized by the interaction's media type—for example, VOICE, EMAIL, and CHAT.
Business Result	This attribute enables data to be organized by the configured business result.
Customer Segment	This attribute enables data to be organized by the configured customer segment.
Service Type	This attribute enables data to be organized by the type of service that was assigned to the interaction.
Day	This attribute enables data within the reporting interval to be organized by a particular day within a month and year. Day values are presented in YYYY-MM-DD format.

### Metrics used in the Business Metrics Executive Report

Metric	Description			
% First Response Time Service Level	The service level that is delivered for this business attribute measured as a percentage of customer interactions that were accepted within a user-defined threshold, relative to all customer interactions that were offered to handling resources.			
Entered with Objective	The total number of customer interactions that entered or began within the contact center, were assigned this business attribute, and either had a baseline service objective or a <b>response threshold</b> (defined in the <b>[agg-gim-thld-QUEUE-IXN]</b> section) that was greater than zero.			

# Customer Perspective Report

This page describes how you can use the (**Business Results** folder) Customer Perspective Report to review key metrics of the customer experience in the contact center.

### Understanding the Customer Perspective Report

										Cı	uston	ner Pers	pective	Rep	ort \		
Tenant	Media Type		e	Day Customer S		Segment Service Type		e E	Entered	Response Ratio	% Accept Service Level	% First Response Time Service Level					
					Chat	_CS		Cha	t_ST		5	1.00	0.00%		80.00%	f	
				6-05-25	defa	ult		defa	nult		1	1.00	100.00%		0.00%		
			201	C 05 0C	Obset	-00		Oha	- OT		4	0.00	0.000		0.000		
		\ C	ustor	ner P	ers	pective	Report										
	Chat		Entered	Respo Rati		% Accept Service Level	% First Response Tir Service Leve		% Finished Service Level	Avg Acc Time Ac (Fmt	gent	Avg First Response Time (Fmt)	Avg Fin Respoi Time (F	ise	Avg Satisfaction	Avg Revenue	
	Onat		5		1.00	0.00%	80.0	00%	100.00%	00:	00:35	00:00:35	00	:06:31	0.00	0.0	
			1		1.00	100.00%	0.0	00%	100.00%	00:	00:05	00:00:05	00	:00:19	0.00	0.00	
			1		0.00	0.00%	0.0	00%	100.00%	00:	00:00	00:00:00	00	:00:00	0.00	0.00	
	- /	1	2		0.00	0.00%	0.0	00%	100.00%	00:	00:00	00:00:00	00	:00:00	0.00	0.00	
	- [		5		1.00	100.00%	0.0	00%	100.00%	00:	00:03	00:00:03	00	:15:49	0.00	0.00	
			2		1.00	50.00%	50.0	00%	100.00%	00:	00:05	00:00:05	00	:00:17	0.00	0.00	
			1		0.00	0.00%	0.0	00%	100.00%	00:	00:00	00:00:00	00	:00:00	0.00	0.00	
			1		1.00	100.00%	0.0	00%	100.00%	00:	00:04	00:00:04	00	:16:39	0.00	0.00	
			2		1.00	0.00%	50.0	00%	100.00%	00:	00:26	00:00:26	00	:15:50	0.00	0.00	
	Email		1		1.00	100.00%	0.0	00%	100.00%	00:	00:04	00:00:04	00	:07:48	0.00	0.00	
	Cilidii	Liliali		5		0.00	0.00%	0.0	00%	100.00%	00:	00:00	00:00:00	00	:00:00	0.00	0.00
Environment					26	1	.00	34.62%	23.0	08%	100.00%	00:0	0:14	00:00:14	00:	10:26	0.00
			4		1.00	0.00%	25.0	00%	100.00%	00:	00:35	00:00:05	00	:00:49	0.00	0.00	
			3		0.00	0.00%	0.0	00%	100.00%	00:	00:00	00:00:00	00	:00:00	0.00	0.00	
	ı		1		1.00	100.00%	100.0	00%	100.00%	00:	00:02	00:00:08	00	:00:15	0.00	0.0	
			1		1.00	100.00%	100.0	00%	100.00%	00:	00:12	00:00:05	00	:00:25	0.00	0.0	
			1		0.00	100.00%	0.0	00%	0.00%	00:	00:05	00:00:00	00	:00:00	0.00	0.0	
	{		3		0.00	0.00%	0.0	00%	100.00%	00:	00:00	00:00:00	00	:00:00	0.00	0.0	
	1	YPE	2	(	0.00	100.00%	0.0	00%	100.00%	00:	00:00	00:00:00	00	:00:00	0.00	0.0	
		\					20.0	00%	93.33%				<u></u> 00:	00:30	0.00	0.00	

This report summarizes contact center milestones from a customer perspective, providing the average response times, revenue and customers satisfaction scores, and various service level percentages of interactions that enter or begin with the contact center. This report also provides such summary values as the average revenues generated by each customer segment, by media type, and to evaluate the average customer satisfaction scores. Attributes applied to these metrics include

customer segment, service type, and media type.

Use this report to understand such key indicators as how much time elapsed before customers were connected to agents or received responses, how satisfied customers were with their transactions, and how much money they spent.

To get a better idea of what this report looks like, view sample output from the report: HRCXICustomerPerspectiveReport.pdf

The following tables explain the prompts you can select when you generate the report, and the metrics and attributes that are represented in the report:

### Prompts for the Customer Perspective Report

Prompt	Description
Pre-set Date Filter	From the list, choose a time period on which to report, and move it to the Selected list.
Start Date	Choose the first day from which to gather report data.
End Date	Choose the last day from which to gather report data.
Customer Segment	Optionally, select a configured Customer Segment on which to report.
Service Type	Optionally, select the type of service to include in the report.
Media Type	Optionally, select the type of media to include in the report—for example, VOICE, EMAIL, and CHAT.
Tenant	For multi-tenant environments, optionally select the tenant(s) for which to include data in the report.

### Attributes used in the Customer Perspective Report

Attribute	Description
Tenant	This attribute enables data within the reporting interval to be organized by tenant.
Media Type	This attribute enables data to be organized by the interaction's media type—for example, VOICE, EMAIL, and CHAT.
Day	This attribute enables data within the reporting interval to be organized by a particular day within a month and year. Day values are presented in YYYY-MM-DD format.
Customer Segment	This attribute enables data to be organized by the

Attribute	Description
	configured customer segment.
Service Type	This attribute enables data to be organized by the type of service that was assigned to the interaction.

### Metrics used in the Customer Perspective Report

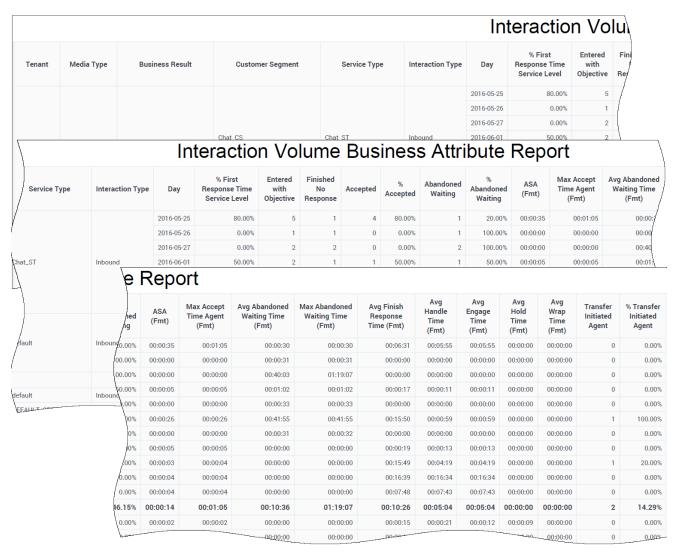
Metric	Description
Entered	The total number of customer interactions that entered or began within the contact center and were assigned this business attribute. This count includes abandoned interactions.
Response Ratio	The ratio of interactions of this business attribute for which an outbound reply was created to customers to all accepted interactions of this business attribute.  For all media types, this ratio could be greater than 1:1.
% Accept Service Level	The service level, measured as a percentage of interactions that entered this tenant and were accepted within a user-defined threshold, relative to all interactions that entered this tenant and were offered to a resource.
% First Response Time Service Level	The service level that is delivered for this business attribute measured as a percentage of customer interactions that were accepted within a user-defined threshold, relative to all customer interactions that were offered to handling resources.
% Finished Service Level	The percentage of time within the interval that this agent was engaged with customers, relative to the total duration within the interval of the agent's active session on a particular media channel.
Avg Accept Time Agent (Fmt)	The average amount of time (HH:MM:SS) it took agents to accept customer interactions of this business attribute.  This metric is identical to BA Customer\ASA.
Avg First Response Time (Fmt)	The average amount of time (HH:MM:SS) including mediation duration that elapsed before a first response to a customer interaction, that was assigned this business attribute was created.  For synchronous media, a response is considered to have been created when the interaction was accepted by a handling resource. For asynchronous media, the first reply to a given interaction must be sent in order to increment this metric.

Metric	Description
Avg Finish Response Time (Fmt)	The average duration (HH:MM:SS) of completed customer interactions that both had a response by a handling resource and were assigned this business attribute. This duration includes the entire lifespan of the interaction including processing, queueing, and handling.
Avg Satisfaction	The average customer-satisfaction score of interactions assigned this business attribute. The average considers only those interactions for which customer satisfaction was recorded.
Avg Revenue	The average amount of revenue that is generated for interactions assigned this business attribute. The average considers only those interactions for which revenue was generated.

# Interaction Volume Business Attribute Report

This page describes how you can use the (**Business Results** folder) Interaction Volume Business Attribute Report to understand the Business Result for interactions, to contrast that result against the Service Level and against callers' initial objective, and to understand outcomes in light of various interaction handling metrics.

### Understanding the Interaction Volume Business Attribute Report



This report provides detailed information about how interactions that enter the contact center are categorized into the business-result attributes that are configured in your environment, including analysis (based on the Entered with Objective metric) of the service level within the perspective of the total number of interactions that are offered to resources by day over the reporting interval.

If the business-result classification changes during an interaction, Genesys Info Mart attributes the business result that is in effect when interaction handling ends to the business result that is attached to the interaction. More accurately, the business result that is associated with the interaction at the end of the segment with the first handling resource is attached to the interaction.

If the interaction does not reach a handling resource, the last associated business result is attached to the interaction. Percentages that yield zero (0) values indicate either 0 duration or 0 count. So, for example, % Abandoned Waiting could signify either that no interactions of this business result were abandoned, or that no interactions of this business result entered the contact center at all.

All of the metrics in this report are disposition metrics, which means that interaction total counts are attributed to the interval in which the interaction arrives, and only when interaction processing is complete. Genesys supports customization of the % First Response Time Service Level metric to align its definition with your business.

Use this report to understand the Business Result for interactions, to contrast that result against the Service Level and against callers' initial objective, and to understand outcomes in light of various interaction handling metrics.

To get a better idea of what this report looks like, view sample output from the report:

#### HRCXIInteraction Volume Business Attribute Report.pdf

The following tables explain the prompts you can select when you generate the report, and the metrics and attributes that are represented in the report:

### Prompts for the Interaction Volume Business Attribute Report

Prompt	Description
Pre-set Date Filter	From the list, choose a time period on which to report, and move it to the Selected list.
Start Date	Choose the first day from which to gather report data.
End Date	Choose the last day from which to gather report data.
Business Result	Optionally, select a configured Business Result on which to report.
Customer Segment	Optionally, select the customer segment to include in the report.
Service Type	Optionally, select the type of service to include in

Prompt	Description
	the report.
Media Type	Optionally, select the type of media to include in the report—for example, VOICE, EMAIL, and CHAT.
Interaction Type	Optionally, select the type of interaction to include in the report—for example, Inbound, Outbound, and Internal.
Tenant	For multi-tenant environments, optionally select the tenant(s) for which to include data in the report.

# Attributes used in the Interaction Volume Business Attribute Report

Attribute	Description
Tenant	This attribute enables data within the reporting interval to be organized by tenant.
Media Type	This attribute enables data to be organized by the interaction's media type—for example, VOICE, EMAIL, and CHAT.
Business Result	This attribute enables data to be organized by the configured business result.
Customer Segment	This attribute enables data to be organized by the configured customer segment.
Service Type	This attribute enables data to be organized by the type of service that was assigned to the interaction.
Interaction Type	This attribute enables data to be organized by the interaction's type—for example, Inbound, Outbound, and Internal.
Day	This attribute enables data within the reporting interval to be organized by a particular day within a month and year. Day values are presented in YYYY-MM-DD format.

# Metrics used in the Interaction Volume Business Attribute Report

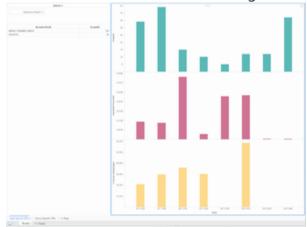
Metric	Description
% First Response Time Service Level	The service level that is delivered for this business attribute, measured as a percentage of customer interactions that were accepted within a user-defined threshold, relative to all customer interactions that were offered to handling

Metric	Description
	resources.
Entered With Objective	The total number of customer interactions that entered or began within the contact center, were assigned this business attribute, and either had a baseline service objective or a <b>response threshold</b> (defined in the <b>[agg-gim-thld-QUEUE-IXN]</b> section) that was greater than zero.
Finished No Response	The total number of completed interactions for which no response was created. This count includes interactions that were abandoned or otherwise stopped for any reason.  This metric is calculated as the difference between finished interactions (Finished) and finished interactions that had a response (Finished Response).
Accepted	The total number of customer interactions of this business attribute that were accepted, answered, pulled, or initiated by a handling resource.
% Accepted	The percentage of customer interactions of this business attribute that were accepted, relative to the total number of interactions of this business attribute that were offered to a handling resource.
	This metric relies on the value of the <b>short-abandoned threshold</b> as configured in the <b>[agg-gim-thld-ID-IXN]</b> section.
Abandoned Waiting	The total number of customer interactions of this business attribute that were abandoned or stopped for any reason while the interactions were waiting for the first handling resource. The count includes customer interactions that were abandoned while they were ringing at the agent's desktop or alerting at the handling resource as well as shortabandoned interactions.
% Abandoned Waiting	The percentage of customer interactions of this business attribute that were abandoned, relative to the total number of customer interactions of this business attribute that entered or began within the contact center during the interval.
ASA (Fmt)	The average amount of time (HH:MM:SS) it took agents to accept, answer, or pull customer interactions assigned this business attribute.  This metric is identical to BA Customer\Avg Accept Time Agent.
Max Accept Time Agent (Fmt)	The longest amount of time (HH:MM:SS) that customer interactions of this business attribute spent in a queue before the interactions were accepted by the first handling resource. The duration starts when the interaction enters or begins within the contact center and ends when the interaction is accepted. This metric includes alert (ring) time.

Metric	Description
Avg Abandoned Waiting Time (Fmt)	The average amount of time (HH:MM:SS) that interactions of this business attribute waited within the contact center before customers abandoned the interactions or before they were dropped for any reason. This average includes interactions that were abandoned or dropped within the shortabandoned threshold and excludes interactions that were abandoned or dropped while they were alerting (ringing) at an agent's desktop.
Max Abandoned Waiting Time (Fmt)	The maximum amount of time (HH:MM:SS) that customer interactions that entered or began within the contact center and were assigned this business attribute spent in a queue and/or alerting/ringing at the first target before the interactions were abandoned or stopped for any reason.
Avg Finish Response Time (Fmt)	The average duration, (HH:MM:SS) of completed customer interactions that both had a response by a handling resource and were assigned this business attribute. This duration includes the entire lifespan of the interaction including processing, queueing, and handling.
Avg Handle Time (Fmt)	The average amount of time (HH:MM:SS) that agents spent handling interactions assigned this business attribute.
Avg Engage Time (Fmt)	The average amount of time (HH:MM:SS) that agents were engaged with customers on interactions assigned this business attribute.
Avg Hold Time (Fmt)	The average amount of time (HH:MM:SS) that customers spent on hold for interactions assigned this business attribute. This metric is attributed to the interval in which the interactions were accepted by a resource.
Avg Wrap Time (Fmt)	The average amount of time (HH:MM:SS) that agents spent performing after call work for customer interactions that were assigned this business attribute.
Transfer Initiated Agent	The total number of customer interactions of this business attribute that agents transferred.  Both warm and blind transfers are reflected in this metric.
% Transfer Initiated Agent	The percentage of customer interactions of this business attribute that agents transferred.  Both warm and blind transfers are reflected in this metric.

# Weekly Business Attribute Dashboard

The (**Dashboards** and **Business Results** folders) Weekly Business Attribute Dashboard provides detailed information and visualizations illustrating how interactions that enter the contact center are categorized into the business-result attributes that are configured in your environment.



Weekly Business Attribute Dashboard

#### Understanding the Weekly Business Attribute Dashboard

The Weekly Business Attribute Dashboard has a tab for each tenant, which is further subdivided into two tabs:

- **Agent-Specific KPIs** tab Visualizations of the weekly volume of interactions agents accepted, average handle time, and the percentage of interactions that were transferred. Use the Business Result list to quickly focus the visualization on one result.
- Queue-Specific KPIs tab Visualizations of the weekly values representing critical queue KPIs: Entered with Objective, ASA, First Response Time, and Abandoned Waiting. Use the Business Result list to quickly focus the visualization on one result.

If the business-result classification changes during an interaction, Genesys Info Mart attributes the business result that is in effect when interaction handling ends to the business result that is attached to the interaction. More accurately, the business result that is associated with the interaction at the end of the segment with the first handling resource is attached to the interaction.

To get a better idea of what this dashboard looks like, view sample output from the dashboard:

SampleWeekly Business Attribute Dashboard .pdf

Link to video

The following tables explain the prompts you can select when you generate the dashboard, and the metrics and attributes that are represented in the dashboard:

#### Prompts available the Weekly Business Attribute Dashboard

The following table lists prompts available for the Weekly Business Attribute Dashboard:

Prompt	Description
Pre-set Date Filter	From the convenient list of predefined dates, choose a date for which to run the report.
Start Date	Choose the first day from which to gather data into the dashboard.
End Date	Choose the last day from which to gather data into the dashboard.
Business Result	Optionally, select one or more business results on which to focus the report.
Customer Segment	Optionally, select one or more customer segments on which to focus the report.
Service Type	Optionally, select one or more service types on which to focus the report.
Media Type	Optionally, select one or more media types to include in the report—for example, VOICE, EMAIL, and CHAT.
Interaction Type	Optionally, select the type of interaction to include in the report—for example, Inbound, Outbound, and Internal.
Tenant	For multi-tenant environments, optionally select one or more tenants on which to focus the report.

#### Attributes used on the Weekly Business Attribute Dashboard

The following table lists attributes used on the Weekly Business Attribute Dashboard:

Attribute	Description
Business Result	Click values in this column to focus the report on specific business results.
Week	Enables data within the reporting interval to be organized by a particular week (1-53).

### Metrics used on the Weekly Business Attribute Dashboard

The following table lists metrics used on the Weekly Business Attribute Dashboard:

Metric	Description
Accepted	The total number of customer interactions of this business attribute that were accepted, answered, pulled, or initiated by a handling resource.
Avg Handle Time (Fmt)	The average amount of time (HH:MM:SS) that agents spent handling interactions assigned this business attribute.
% Transfer Initiated Agent	The percentage of customer interactions of this business attribute that agents transferred.
J	Both warm and blind transfers are reflected in this metric.
Entered With Objective	The total number of customer interactions that entered or began within the contact center, were assigned this business attribute, and either had a baseline service objective or a <b>response threshold</b> (defined in the <b>[agg-gim-thld-QUEUE-IXN]</b> section) that was greater than zero.
ASA (Fmt)	The average amount of time (HH:MM:SS) it took agents to accept, answer, or pull customer interactions assigned this business attribute.
	This metric is identical to BA Customer\Avg Accept Time Agent.
% First Response Time Service Level	The service level that is delivered for this business attribute, measured as a percentage of customer interactions that were accepted within a user-defined threshold, relative to all customer interactions that were offered to handling resources.
% Abandoned Waiting	The percentage of customer interactions of this business attribute that were abandoned, relative to the total number of customer interactions of this business attribute that entered or began within the contact center during the interval.

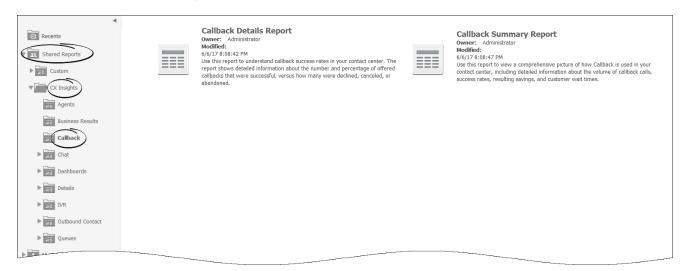
To view more detailed information about the metrics and attributes in this dashboard, and other metrics and attributes that can be used to customize reports, see the *Genesys CX Insights Projects Reference Guide*.

# Callback reports

This page describes reports you can use to learn more about the performance of Callback in your contact center. Reports in the **Callback** folder are ready to use, but as always, can be modified to suit your specific business needs.

Reports in this folder require that specific RAA options be enabled: enable-callback. For more information, see the *Genesys CX Insights Deployment Guide*.

### About Callback reports



The following reports are available in the **CX Insights** > **Callback** folder:

- Callback Details
- Callback Summary

#### **Related Topics:**

- Go back to the complete list of available reports.
- Learn how to understand and use reports.
- Learn how to create or customize reports.

# Callback Summary Report

This page describes how you can use the (**Callback** folder) Callback Summary Report to understand overall callback success rates in your contact center. It shows, at a glance, the number and percentage of offered callbacks that were successful, versus how many were declined, canceled, or abandoned.

### Understanding the Callback Summary Report

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This report provides detailed information about callbacks that were processed by the contact center, allowing you to analyse callback performance based on nearly thirty metrics, including:

- Total number of accepted, declined, attempted, connected, cancelled, abandoned, and successful callbacks.
- Percentages of callbacks that were successful, unsuccessful, declined, or connected.

• Savings resulting from callbacks, including the total amount time and money saved and the average time and money saved per callback.

• The number of attempts made to complete callbacks, the time customers spent waiting for an agent, and time customers waited before abandoning a call.

Use this report to view a comprehensive picture of how Callback is used in your contact center, including detailed information about the volume of callback calls, success rates, resulting savings, and customer wait times.

To get a better idea of what this report looks like, view sample output from the report: HRCXICallbackSummaryReport.pdf

The following tables explain the prompts you can select when you generate the report, and the metrics and attributes that are represented in the report:

### Prompts for the Callback Summary Report

Prompt	Description
Pre-set Date Filter	From the list, choose a time period on which to report, and move it to the Selected list.
Start Date	Choose the first day from which to gather report data.
End Date	Choose the last day from which to gather report data.
Queue	Optionally, select a queue on which to report.
Channel	Optionally, select a media channel on which to report.
Callback Type	Optionally, select the Callback Type to include in the report—for example, IMMEDIATE, WAIT_FOR_AGENT, SCHEDULE.
Tenant	For multi-tenant environments, optionally select the tenant(s) for which to include data in the report.
Minute Price	Enter a per-minute price, which is used to calculate cost savings.

### Attributes used in the Callback Summary Report

Attribute	Description
Tenant	This attribute enables data within the reporting interval to be organized by tenant.
Queue	This attribute enables data within the reporting

Attribute	Description				
	interval to be organized based on the type of the virtual queue				
Day	This attribute enables data within the reporting interval to be organized by a particular day within a month and year. Day values are presented in YYYY-MM-DD format.				
Callback Type	This attribute enables data to be organized based on the type of callback.				
cumback type	Values: {IMMEDIATE,WAIT_FOR_AGENT, SCHEDULE}				
	This attribute enables data to be organized based on the type of callback offer that was presented to the customer.				
	Values: {SCHEDULED, WAIT_FOR_AGENT, COMBINED_SCHEDULED_AND_WAIT_FOR_AGENT} For example:				
Callback Offer Type	<ul> <li>During off-hours, only the scheduled option is available.</li> </ul>				
	<ul> <li>Business rules can also allow only wait_for_agent option during on-hours, or a combination of scheduled and</li> </ul>				
	wait_for_agent.				
Channel	This attribute enables data to be organized based on the Callback origination channel.				
	Values={ivr, web}.				

# Metrics used in the Callback Summary Report

Metric	Description
Offered	The total number of times that callback was offered to a customer.
Accepted	The total number of times that callbacks were accepted by a customer.
Forced Dialed	The total number of calls that were force-dialed (or pushed) regardless of actual agent availability, because the callback queue was being flushed.
Accepted Wait for Agent	The total number of times that WAIT FOR AGENT callback was accepted by a customer.
Accepted Scheduled	The total number of times that SCHEDULED callback was accepted by a customer.
Accepted Immediate	The total number of times that IMMEDIATE callback was accepted by a customer.

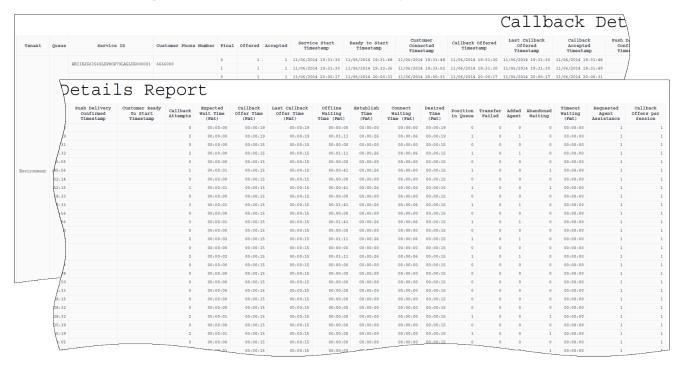
Metric	Description
Declined	The total number of customer callback offers that were declined by the customer.
% Declined	The percentage of customer callback offers that were declined by the customer.
Attempted	The total number of callback attempts, including the one that succeeded.
Customer Connected	The total number of times a customer was connected after callback dialout, including instances where no agent was connected.
% Customer Connected	The percentage of customer calls that connected after callback dialout, including instances where no agent was connected.
% Canceled	The percentage of callback customer interactions that were canceled before completion. Includes all canceled callbacks, whether canceled manually by the customer, manually by an administrator, or automatically because the customer called again before the callback was completed.
% Abandoned	The percentage of callback customer interactions that were abandoned by the customer while waiting for an agent to connect.
Successful	The total number of callbacks that successfully connected the customer with an agent.
% Successful	The percentage of callbacks that successfully connected the customer with an agent.
% Unsuccessful	The percentage of callback customer interactions that were not completed successfully (because they were abandoned, declined, or canceled).
Saved Time (Fmt)	The amount of call time (HH:MM:SS) that was saved because of callback.
Avg Saved Time (Fmt)	The average amount of call time (HH:MM:SS) that was saved because of callback.
Money Saved	The amount of money saved due to callback, calculated based on the Minute Price.
Avg Money Saved	The average amount of money that was saved per callback.
Attempt 1	The total number of callback connections that were successfully completed on the first callback attempt.
Attempt 2	The total number of callback connections that were successfully completed on the second callback attempt.
Attempt 3	The total number of callback connections that were successfully completed on the third callback attempt.
Attempt 4	The total number of callback connections that were successfully completed on the forth callback

Metric	Description
	attempt.
Time To Abandon Waiting For Agent (Fmt)	After successful callback, the total amount of time (HH:MM:SS) all customers spent waiting for agents before abandoning the call.
Max Time To Abandon Waiting For Agent (Fmt)	After a successful callback, the maximum amount of time (HH:MM:SS) any customer spent waiting before abandoning the call.
Avg Time To Abandon Waiting For Agent (Fmt)	After successful callback, the average amount of time (HH:MM:SS) customers spent waiting for agents before abandoning the call.
Time To Wait For Agent (Fmt)	After successful callbacks, the total amount of time (HH:MM:SS) all customers spent waiting for an agent.
Max Time To Wait For Agent (Fmt)	After a successful callback, the maximum amount of time (HH:MM:SS) any customer spent waiting for an agent.
Avg Time To Wait For Agent (Fmt)	After a successful callback, the average amount of time (HH:MM:SS) a customer spent waiting for an agent.

# Callback Details Report

This page describes how you can use the (**Callback** folder) **Callback Details Report** to understand overall callback success rates in your contact center. It shows detailed information about the number and percentage of offered callbacks that were successful, versus how many were declined, canceled, or abandoned. Reporting on declined callback offers is available in Genesys Engage cloud deployments only.

### Understanding the Callback Details Report



This report provides detailed information about callbacks that were processed by the contact center, allowing you to analyse callback performance based on nearly 30 metrics. Use this report to view a detailed picture of how Callback is used in your contact center, including information about the volume of callback calls, success rates, resulting savings, and customer wait times.

To get a better idea of what this report looks like, view sample output from the report: HRCXICallbackDetailsReport.pdf

The following tables explain the prompts you can select when you generate the report, and the metrics and attributes that are represented in the report:

# Prompts for the Callback Details Report

Prompt	Description
Pre-set Day Filter	Choose a day from the list of preset options. This prompt overrides the Start Time and End Time values.
Start Time	Choose the day and time from which to begin collecting data into the report. This prompt has no effect if Pre-set Day Filter is set to anything except <b>None</b> .
End Time	Choose the day and time at which to stop collecting data into the report.
Final or Not	Enter 1 to restrict the report to only those calls where callback was dialed, or enter 0 to include all scheduled Callbacks, even if they were never dialed.
Queue	Select one or more queues from which to gather data into the report. Default: <b>ALL</b>
Customer Phone Number	Select one or more customer phone numbers for which to gather data into the report. Default: <b>ALL</b>
Tenant	Select one or more tenants to include in the report. Default: <b>ALL</b>

# Attributes used in the Callback Details Report

Attribute	Description					
Tenant	Enables data within the reporting interval to be organized by tenant. For multi-tenant environments, the universe connection that you define points to only one tenant schema in the Info Mart. New connections are required for access to other tenant schemas.					
Queue	Enables data within the reporting interval to be organized based on the name of the virtual queue.					
Service ID	Enables data within the reporting interval to be organized based on the original SCXML/GMS session ID.					
Customer Phone Number	Enables data to be organized based on the phone number provided by the customer for callback.  This number is used to dial out (CUSTOMER_TERMINATED scenario) or used to execute match by ANI (CUSTOMER_ORIGINATED scenario).					
Forced Dialed	Enables data to be organized based on whether the callback queue is being flushed, and dialing (or push notification) is being forced regardlss of actual agent availability. $(0 = No, 1 = Yes)$ .					

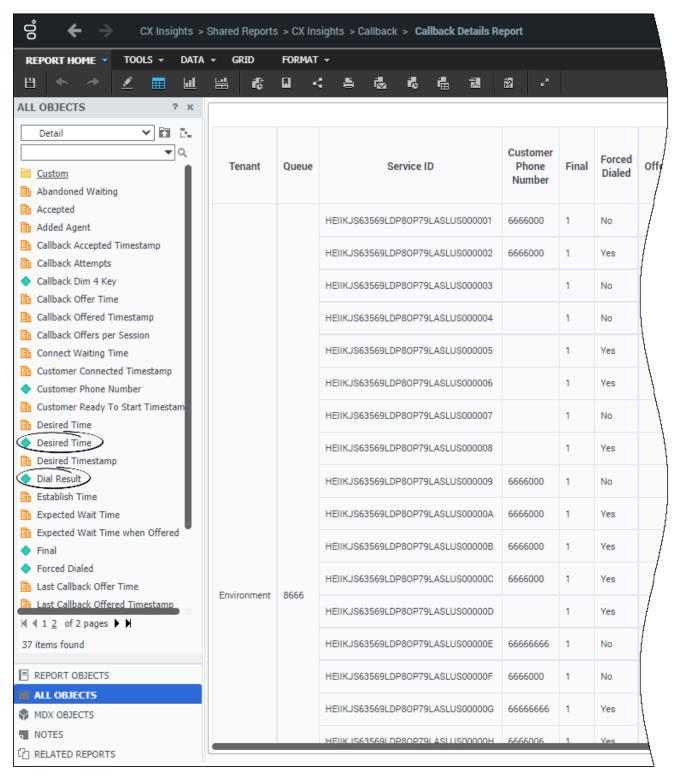
Attribute	Description
	A value of 1 (yes) might occur at the end of the day, when contact center personnel are trying to close the queue for the day and do not want to leave any callbacks for the next day.

# Metrics used in the Callback Details Report

Metric	Description
Offered	Indicates whether callback was offered to the customer. $(0=no, 1=yes)$
Accepted	Indicates whether callback was accepted by the customer. $(0=no, 1=yes)$
Service Start Timestamp	The date and time (UTC) when the Callback service started.
	Either:
Ready To Start Timestamp	The time when the contact center was ready to start the outbound dial attempt for CUSTOMER_TERMINATED scenarios. or: The time when the contact center sent push notification to the user device in CUSTOMER_ORIGINATED scenarios.
Customer Connected Timestamp	The time when the customer started waiting to be connected to an agent.
Callback Offered Timestamp	The time when the customer was first offered callback during the session.
Last Callback Offered Timestamp	The date and time of the last callback offered to a customer during the session.
Callback Accepted Timestamp	The time when the customer accepted callback during the session.
Push Delivery Confirmed Timestamp	The time when the application confirmed that push notification was received. This is used for CUSTOMER_ORIGINATED scenarios.
	The time when the customer was ready to start media interaction for CUSTOMER_ORIGINATED scenarios.
Customer Ready to Start Timestamp	This value is typically set when the application sends a request for an access number to dial and access code for match function.
Desired TimeStamp	The callback time that was promised to the customer when callback was scheduled.
Callback Attempts	The number of times the system attempted to call the customer back.
Expected Wait Time (Fmt)	The customer expected wait time when the callback dial attempt was ready to begin.
Callback Offer Time (Fmt)	The amount of time that elapsed between the

Metric	Description
	instant when a callback was offered to the customer, and the instant when the customer accepted or declined the offer.
Last Callback Offer Time (Fmt)	The duration (in seconds) of the last callback offered to a customer during the session.
Offline Waiting Time (Fmt)	The amount of time that elapsed between when the customer accepted a callback offer and the time when they were connected to an agent after callback.
Establish Time (Fmt)	The amount of time required to establish the outbound call.
Connect Waiting Time (Fmt)	The amount of time that elapsed between when the customer connected to the callback call and when an agent was connected.
Position in Queue	The customer's position in the queue when the callback outbound dial attempt was ready to begin.
Transfer Failed	The number of failed attempts to transfer the callback interaction to the agent.
Added Agent	Indicates whether an agent was successfully added to the callback call. $(0=no, 1=yes)$
Abandon Waiting	Indicates whether the call was abandoned by the customer while waiting for an agent to connect. $(0=no,\ 1=yes)$
Timeout Waiting (Fmt)	The number of times that a customer was disconnected because the max timeout limit was reached.
Requested Agent Assistance	The number of callbacks that were offered to customers who had requested agent assistance. $(0=no, 1=yes)$
Callback Offers per Session	The number of times callback was offered, per single interaction.

# Customize the report to filter by Desired Time and Dial Result



Use this procedure to customize this report to organize callback information based on the callback time customers requested, and result of the callback attempt.

#### **Important**

Note that filtering by Desired Time can decrease SQL performance. Genesys recommends running a report with this modification over a limited period of time, such as one day or less.

- 1. Log in with an account having Administrator privileges.
- 2. Open and run the Callback Details report.
- 3. In the **Save As** editor:
  - 1. Click Report Home > Save As.
  - 2. In the **Save in** field, choose either: **Shared Reports** > **Custom** to make the new report accessible to other users, or **My Reports** to make the new report accessible only to you.
  - 3. Enter a **Name** for the report, such as **Callback Details By Desired Time**, and optionally modify the **Description**, or **Advanced Options**.
  - 4. Click OK.
- 4. In the Report Saved editor, click Run newly saved report.
- 5. The prompts page opens; make appropriate selections and click **Run Report**. You can now modify the report:
- 6. In the menu, click **Grid** > **Design** to view the Report Objects Editor (if it's not already visible).
- 7. Click **All Objects**, and browse to **GCXI** > **Callback**. Note that objects in the folder are sorted alphabetically; use the controls at the bottom of the list to see additional objects.
- 8. To organize the data based on the callback time that customers requested:
  - 1. From the list of available objects, drag the attribute **Desired Time** into the filter panel, and set the input value for it to **Between (enter value 1;value2)**.
  - 2. Drag the existing Pre-set and Day and Time Range and Pre-set and Day and Time Range(Callback) filters out of the panel, to remove them from the report.
- 9. To organize the data based on the result of the callback attempt:
  - 1. From the list of available objects, drag the attribute **Dial Result** into the report grid.
  - 2. Select forms if required.
- 10. Once you have finished editing the report, click **Save**, and re-run the report to test your changes.

For more information about customizing Genesys CX Insights, see Customizing reports.

#### Attributes used in this procedure

Attribute	Description
Dial Result	Enables data to be organized based on the dialing result. Values=BUSY, NO_ANSWER, ANSWERING_MACHINE, ERROR_TONE, FAX, PERSON, REDIAL_LIMIT_REACHED.
Desired Time	Enables data to be organized based on the callback time requested by the customer.

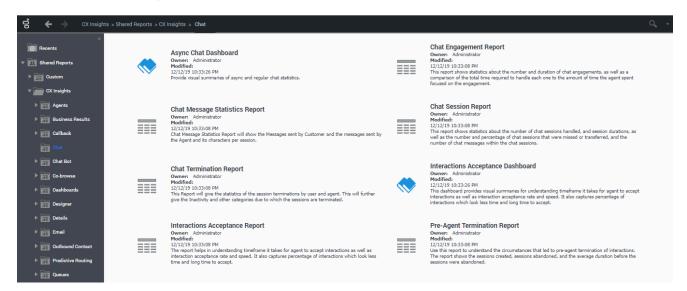
For more information about objects you can use to customize Callback reports, see Callback in the Genesys CX Insights Projects Reference Guide.

# Chat reports

This page describes reports you can use to learn more about chat volumes, statistics, and outcomes in your contact center. For information about provisioning Chat reporting, see Chat Server Administration and User Data Sources and KVPs in the Genesys Info Mart Deployment Guide.

Reports in this folder require that specific RAA options be enabled: enable-chat, and in some cases enable-chat-thread. For more information, see the *Genesys CX Insights Deployment Guide*.

#### About Chat reports



The following reports and dashboards are available in the **CX Insights** > **Chat** folder:

- · Asynchronous Chat Dashboard
- · Chat Engagement Report
- Chat Message Statistics Report
- Chat Session Report
- · Chat Termination Report
- · Interaction Acceptance Dashboard
- Interaction Acceptance Report
- · Pre-Agent Termination Report

#### Related Topics:

- Go back to the complete list of available reports.
- Learn how to understand and use reports.
- Learn how to create or customize reports.

# Chat Engagement Report

This page describes how you can use the (**Chat** folder) Chat Engagement Report to learn more about the number of chat engagements agents had, and the duration of each. Sessions can contain more than one *engagement*; each engagement represents an agent's participation in that part of a session.

#### Understanding the Chat Engagement Report

Chat Engagement Report																
Tenant	Media Type	Media Origin	Agent Group	Agent Name		Day	Offered	Accepted	Acceptance Rate	Engagement Handle Time (Fmt)	Focus Time (Fmt)					
		facebook	No Group	a1001	surname01	name01	e1001	2019-02-20	1	1	100.00%	00:05:55	00:00:00			
								2019-01-30	1	1	100.00%	00:00:59	00:00:00			
						2019-02-11	2	2	100.00%	00:01:43	00:00:00					
Environment	Chat			a1001	surname01	name01	e1001	2019-02-20	2	2	100.00%	00:01:04	00:00:00			
Bilvii Oliment	Ciiac	unknown	No Group	21001	Surname vi	Surnamevi	Surnamevi	Sullidilevi	Halle VI	21001	2019-02-22	2	0	0.00%	00:00:00	00:00:00
														2019-03-01	2	0
									2019-03-04	6	4	66.67%	00:15:22	00:00:00		
				a1002	surname02	name02	e1002	2019-03-04	3	1	33.33%	00:39:18	00:00:00			

This report shows statistics about the number and duration of chat engagements, as well as a comparison of the total time required to handle each one to the amount of time the agent spent focused on the engagement.

To get a better idea of what this report looks like, view sample output from the report: SampleChatEngagementReport.pdf

The following tables explain the prompts you can select when you generate the report, and the metrics and attributes represented in the report:

#### Prompts for the Chat Engagement Report

All prompts in this report are optional; run them with no value to return all available data.

Prompt	Description
Pre-set Date Filter	From the list, choose a time period on which to report and move it to the <b>Selected</b> list. Default: Current month. If this prompt is set to anything other than <b>none</b> , the Date prompts are ignored.
Start Date	Choose the first day from which to gather report data. If the Pre-set Date Filter is set to any value except <b>none</b> , this prompt has no effect, unless the time period selected for Pre-set Date Filter contains no data.
End Date	Choose the last day from which to gather report

Prompt	Description
	data. If the Pre-set Date Filter is set to any value except <b>none</b> , this prompt has no effect, unless the time period selected for Pre-set Date Filter contains no data.
Media Type	Optionally, select the type of media to include in the report—for example, CHAT, Facebook, Twitter, or SMS. See the table Media Type vs Media Origin for more information.
Tenant	Optionally, select a tenant on which to report.
Agent Group	Optionally, select or or more agent groups on which to report.
Media Origin	Optionally, select the chat session place of origin—for example, CHAT, Facebook, Twitter, or SMS. See the table Media Type vs Media Origin for more information.

The following table explains how Media Type differs from Media Origin.

#### Media Type vs Media Origin

Media	Media Type	Media Origin
Chat	CHAT	Chat
Facebook private messaging	CHAT	Facebook
Facebook public messaging	Facebook	Facebook
Twitter direct message	CHAT	Twitter
Twitter	Twitter	Twitter
SMS	SMS	SMS
WhatsApp	CHAT	WhatsApp

# Attributes used in Chat Engagement Report

Attribute	Description	Data Mart Column
Tenant	Enables data within the reporting interval to be organized by tenant.	TENANT.TENANT_NAME
Media Type	Enables data within the reporting interval to be organized by media type—for example, CHAT, Facebook, Twitter, or SMS. See the table Media Type vs Media Origin for more information.	MEDIA_TYPE.MEDIA_NAME
Media Origin	Enables data to be organized by where the chat session originated—for example, CHAT, Facebook, Twitter, or SMS. See	CHAT_SESSION_DIM.MEDIA_ORIGIN

Attribute	Description	Data Mart Column
	the table Media Type vs Media Origin for more information.	
Agent Group	Enables data to be organized by the groups to which agents belong. An agent can belong to more than one agent group.	GROUPGROUP_NAME  WHERE GROUPGROUP_TYPE_CODE in ('AGENT', 'UNKNOWN','NO_VALUE')
Agent Name	Enables data to be organized by certain attributes of the agent who is associated with the interaction.	RESOURCE_GI2.AGENT_NAME
Day	Enables data within the reporting interval to be organized by a particular day.	DATE_TIME.LABEL_YYYY_MM_DD

# Metrics used in the Chat Engagement Report

Metric	Description	Source or Calculation
Offered	Total number of engagement which were offered to the agents.	AG2_AGENT_[*].OFFERED
Accepted	Total number of assigned engagements which were accepted by the agents.	AG2_AGENT_[*].ACCEPTED
Acceptance Rate	Percentage of accepted engagements / assigned engagements.	Offered / Accepted
Engagement Handle Time (Fmt)	Total duration (HH:MM:SS) of the agent engagement. Calculated as the difference between the time when the agent joins the chat and the time when the agent leaves the chat (or the time the chat ends).	
Focus Time (Fmt)	The total amount of time (HH:MM:SS) spent handling chat interactions received by agent(s) or agent group(s). This metric excludes dormant time.	

# Chat Message Statistics Report

This page describes how you can use the (**Chat** folder) Chat Message Statistics Report to learn more about how chat is used in the contact center.

#### Understanding the Chat Message Statistics Report

#### Chat Message Statistics Report

Day	Tenant	Media Type	Avg Messages sent by Agent	Avg Messages sent by Customer	Avg Characters per Session typed by Agent
2018-02-19	Environment	Chat	3.52	4.03	176.07
2010-02-19	Total		3.52	4.03	176.07
2018-02-20	Environment	Chat	3.15	3.71	157.61
2018-02-20	Total		3.15	3.71	157.61
Total			3.36	3.89	167.94

This report provides detailed information about the number and duration of chat messages exchanged between customers and agents.

To get a better idea of what this report looks like, view sample output from the report: Sample Chat Message Statistics Report.pdf

The following tables explain the prompts you can select when you generate the report, and the metrics and attributes represented in the report:

#### Prompts for the Chat Message Statistics Report

All prompts in this report are optional; run them with no value to return all available data.

Prompt	Description
Pre-set Date Filter	From the list, choose a time period on which to report, and move it to the <b>Selected</b> list. Default: Current month. If this prompt is set to anything other than <b>none</b> , the Date prompts are ignored.
Start Date	Choose the first day from which to gather report data. If the Pre-set Date Filter is set to any value

Prompt	Description
	except <b>none</b> , this prompt has no effect, unless the time period selected for Pre-set Date Filter contains no data.
End Date	Choose the last day from which to gather report data. If the Pre-set Date Filter is set to any value except <b>none</b> , this prompt has no effect, unless the time period selected for Pre-set Date Filter contains no data.
End Reason	Optionally, show only chat sessions that ended for a given reason.
Media Type	Optionally, select the type of media to include in the report—for example, VOICE, EMAIL, and CHAT.
Tenant	Optionally, select a tenant on which to report.

# Attributes used in Chat Message Statistics Report

Attribute	Description
Day	This attribute enables data within the reporting interval to be organized by a particular day.
Tenant	This attribute enables data within the reporting interval to be organized by tenant.
Media Type	This attribute enables data within the reporting interval to be organized by media type.

# Metrics used in the Chat Message Statistics Report

Metric	Description
Avg Messages sent by Agent	The average number of messages sent by agents, per chat session.
Avg Messages sent by Customer	The average number of messages sent by callers / customers, per chat session.
Avg Characters per Session typed by Agent	The average number of characters typed by agents, per session.

# Chat Session Report

This page describes how you can use the (**Chat** folder) Chat Session Report to learn more about the volume of chat sessions handled in your contact center within a specific time period, including details about the number of messages within chat sessions, and about how often chat sessions were missed or transferred.

#### Understanding the Chat Session Report

					Chat Ses	sion Report																	
Tenant	Media Type	Media Origin	Day	Chats	Chats Missed	Chats Transferred	% Chats Missed	% Chats Transferred	Messages From Customer	Messages From Agent	Avg Session Time (Fmt)												
		facebook	2019-02-20	1	0	0	0.00%	0.00%	0	1	00:00:20												
		racebook	Total	1	0	0	0.00%	0.00%	0	1	00:00:20												
			2019-01-30	1	0	0	0.00%	0.00%	3	3	00:01:06												
							2019-02-11	1	0	1	0.00%	100.00%	2	1	00:02:12								
	Chat un	Chat			2019-02-20	2	0	0	0.00%	0.00%	1	2	00:22:47										
Environment				CHac		unknown	unknown	unknown	unknown	unknown	unknown	unknown	unknown	unknown	unknown	unknown	2019-02-22	1	0	0	0.00%	0.00%	0
			2019-03-01	5	1	0	20.00%	0.00%	3	0	00:01:14												
			2019-03-04	6	0	0	0.00%	0.00%	3	3	00:09:38												
			Total	16	1	1	6.25%	6.25%	12	9	00:10:28												
		Total		17	1	1	5.88%	5.88%	12	10	00:09:52												
	Total			17	1	1	5.88%	5.88%	12	10	00:09:52												
Total				17	1	1	5.88%	5.88%	12	10	00:09:52												

This report shows statistics about the number of chat sessions handled, and session durations, as well as the number and percentage of chat sessions that were missed or transferred, and the number of chat messages within the chat sessions.

To get a better idea of what this report looks like, view sample output from the report: SampleChatSessionReport.pdf

The following tables explain the prompts you can select when you generate the report, and the metrics and attributes represented in the report:

#### Prompts for the Chat Session Report

All prompts in this report are optional; run them with no value to return all available data.

Prompt	Description
Pre-set Date Filter	From the list, choose a time period on which to report and move it to the <b>Selected</b> list. Default: Current month. If this prompt is set to anything other than <b>none</b> , the Date prompts are ignored.
Start Date	Choose the first day from which to gather report

Prompt	Description
	data. If the Pre-set Date Filter is set to any value except <b>none</b> , this prompt has no effect, unless the time period selected for Pre-set Date Filter contains no data.
End Date	Choose the last day from which to gather report data. If the Pre-set Date Filter is set to any value except <b>none</b> , this prompt has no effect, unless the time period selected for Pre-set Date Filter contains no data.
Media Type	Optionally, select the type of media to include in the report—for example, CHAT, Facebook, Twitter, or SMS. See the table Media Type vs Media Origin for more information.
Tenant	Optionally, select a tenant on which to report.
Media Origin	Optionally, select the chat session place of origin—for example, CHAT, Facebook, Twitter, or SMS. See the table Media Type vs Media Origin for more information.

The following table explains how Media Type differs from Media Origin.

#### Media Type vs Media Origin

Media	Media Type	Media Origin
Chat	CHAT	Chat
Facebook private messaging	CHAT	Facebook
Facebook public messaging	Facebook	Facebook
Twitter direct message	CHAT	Twitter
Twitter	Twitter	Twitter
SMS	SMS	SMS
WhatsApp	CHAT	WhatsApp

# Attributes used in Chat Session Report

Attribute	Description	Data Mart Column
Tenant	This attribute enables data within the reporting interval to be organized by tenant.	TENANT.TENANT_NAME
Media Type	This attribute enables data within the reporting interval to be organized by media type—for example, CHAT, Facebook, Twitter, or SMS. See the table Media Type vs Media Origin for more information.	MEDIA_TYPE.MEDIA_NAME

Attribute	Description	Data Mart Column
Media Origin	This attribute enables data to be organized by where the chat session originated—for example, CHAT, Facebook, Twitter, or SMS. See the table Media Type vs Media Origin for more information.	CHAT_SESSION_DIM.MEDIA_ORIGIN
Day	This attribute enables data within the reporting interval to be organized by a particular day.	DATE_TIME.LABEL_YYYY_MM_DD

# Metrics used in the Chat Session Report

Metric	Description	Source or Calculation
Chats	The total number of chat sessions.	
Chats Missed	Total number of chats requested by clients that were not answered by agents during the reporting period.	SESSIONS_MISSED = sum(case when sf.MSG_FROM_CUSTOMERS_COUNT > 0 and sf.MSG_FROM_AGENTS_COUNT = 0 then 1 else 0 end))
Chats Transferred	Total number of chats that were transferred to an agent during the reporting period.	SESSIONS_TRANSFERRED = sum(case when sf.AGENTS_COUNT> 1 then 1 else 0 end)
% Chats Missed	Percentage of chats requested by clients that were not answered by agents.	Total Missed Chats / Total Chats
% Chats Transferred	Percentage of chats requested by clients that were transferred to an agent.	Total Transferred Chats / Total Chats
Messages From Customer	Total number of customer messages in all chat sessions within the reporting period.	AG2_CHAT_STATS_x.MSG_FROM_CU
Messages From Agent	Total number of agent messages in all chat sessions within the reporting period.	AG2_CHAT_STATS_x.MSG_FROM_AG
Avg Session Time (Fmt)	The average duration (HH:MM:SS) of chat sessions within the reporting period.	Session Time / Media Session

# Chat Termination Report

This page describes how you can use the (**Chat** folder) Chat Termination Report to learn more about how chat calls terminated.

### Understanding the Chat Termination Report

#### **Chat Termination Report**

Day	Tenant	Media Type	Media Sessions	Avg Session Time	Customer Terminated	% Customer Terminated	Agent Terminated	% Agent Terminated	Sessions Inactive	% Sessions Inactive
2018-02-19	Environment	Chat	117	00:00:36	0	0.00%	117	100.00%	0	0.00%
2016-02-19	Total		117	00:00:36	0	0.00%	117	100.00%	0	0.00%
2018-02-20	Environment	Chat	92	00:00:32	0	0.00%	92	100.00%	0	0.00%
2018-02-20	Total		92	00:00:32	0	0.00%	92	100.00%	0	0.00%
Total			209	00:00:34	0	0.00%	209	100.00%	0	0.00%

This report shows statistics about how interactions were terminated; whether by the client, by the agent, due to inactivity, or for some other reason.

To get a better idea of what this report looks like, view sample output from the report: SampleChatTerminationReport.pdf

The following tables explain the prompts you can select when you generate the report, and the metrics and attributes represented in the report:

#### Prompts for the Chat Termination Report

All prompts in this report are optional; run them with no value to return all available data.

Prompt	Description
Pre-set Date Filter	From the list, choose a time period on which to report, and move it to the <b>Selected</b> list. Default: Current month. If this prompt is set to anything other than <b>none</b> , the Date prompts are ignored.
Start Date	Choose the first day from which to gather report data. If the Pre-set Date Filter is set to any value except <b>none</b> , this prompt has no effect, unless the time period selected for Pre-set Date Filter contains no data.
End Date	Choose the last day from which to gather report data. If the Pre-set Date Filter is set to any value

Prompt	Description
	except <b>none</b> , this prompt has no effect, unless the time period selected for Pre-set Date Filter contains no data.
End Reason	Optionally, show only chat sessions that ended for a given reason.
Media Type	Optionally, select the type of media to include in the report—for example, VOICE, EMAIL, and CHAT.
Tenant	Optionally, select a tenant on which to report.

# Attributes used in Chat Termination Report

Attribute	Description
Day	This attribute enables data within the reporting interval to be organized by a particular day.
Tenant	This attribute enables data within the reporting interval to be organized by tenant.
Media Type	This attribute enables data within the reporting interval to be organized by media type

# Metrics used in the Chat Termination Report

Metric	Description
Media Sessions	The total number of media sessions.
Avg Session Time	The average session duration (HH:MM:SS).
Customer Terminated	The total number of sessions that were terminated by the caller.
% Customer Terminated	The percentage of sessions that were terminated by the caller.
Agent Terminated	The total number of sessions that were terminated by the agent.
% Agent Terminated	The percentage of sessions that were terminated by the agent.
Sessions Inactive	The total number of sessions that were terminated due to inactivity.
% Sessions Inactive	The percentage of sessions that were terminated due to inactivity.
Terminated Due to Other Reasons	The total number of sessions that terminated for any reason other than interruption by the agent, abandonment or interruption by the caller, or inactivity.

# Interactions Acceptance Dashboard

This page describes how you can use the (**Chat** folder) Interactions Acceptance Dashboard to understand how long it takes for agents to accept customer interactions, and to identify what percentage of interactions are accepted promptly, or with some delay.

Note that the term 'dashboard' is used interchangeably with the term 'dossier'. Dashboards / dossiers provide an interactive, intuitive data visualization, summarizing key business indicators (KPIs). You can change how you view the data by using interactive features such as selectors, grouping, widgets, and visualizations, and explore data using multiple paths, through text, data filtering, and layers of organization.

#### Understanding the Interactions Acceptance Dashboard



The Interactions Acceptance Dashboard

The **Interactions Acceptance Dashboard** shows detailed statistics about the speed and rate of agent acceptance of customer interactions. The report displays the time it takes for agents to accept interactions, and the percentage of interactions that are accepted promptly, or with some delay. Use this report to understand interaction acceptance rate and speed, which you can use to optimize agent performance and, by monitoring the time that customers wait before connecting to an agent, help to improve customer experience.

To get a better idea of what this dashboard looks like, view sample output from the report: Sample Interactions Acceptance Dashboard.pdf

The following table explains the prompts you can select when you generate the Interactions Acceptance Dashboard:

#### **Prompts on the Interactions Acceptance Dashboard**

Prompt	Description
Pre-set Date Filter	Choose a time period from the list of preset options

	and move it to the Selected list. If this prompt is set to anything other than <b>none</b> , the Date prompts are ignored. Default: <b>Year to Date</b>
Start Date	Choose the first day from which to gather report data. If the Pre-set Date Filter is set to any value except none, this prompt has no effect, unless the time period selected for Pre-set Date Filter contains no data.
End Date	Choose the last day from which to gather report data. If the Pre-set Date Filter is set to any value except none, this prompt has no effect, unless the time period selected for Pre-set Date Filter contains no data.
Media Type	Optionally, select the type of media to include in the report—for example, CHAT, Facebook, Twitter, or SMS. See the table Media Type vs Media Origin for more information.
Tenant	Optionally, select one or more tenants to include in the report.
Agent Group	Optionally, select one or more Agent Groups from which to gather data into the report.
Media Origin	Optionally, select the chat session place of origin—for example, CHAT, Facebook, Twitter, or SMS. See the table Media Type vs Media Origin for more information.

The following table explains how Media Type differs from Media Origin.

#### Media Type vs Media Origin

Media	Media Type	Media Origin
Chat	CHAT	Chat
Facebook private messaging	CHAT	Facebook
Facebook public messaging	Facebook	Facebook
Twitter direct message	CHAT	Twitter
Twitter	Twitter	Twitter
SMS	SMS	SMS
WhatsApp	CHAT	WhatsApp

The following table explains the attributes used on the Interactions Acceptance Dashboard:

#### Attributes on the PR Performance Dashboard / Queue tab

Attribute	Description	Source Table
Tenant	Enables data within the reporting interval to be organized by tenant. For multi-tenant environments, the GCXI Project connection points to only one Info Mart tenant schema. New	AG2_*.TENANT.KEY???

	connections are required for access to other tenant schemas.	
Media Type	Enables data to be organized based on the media type of the interaction; for example, Voice, Email, or Chat.	MEDIA_TYPE.MEDIA_NAME???
Media Origin	Enables data to be organized based on where the chat session originated; for example, Chat, Facebook, Twitter, or SMS.	CHAT_SESSION_DIM.MEDIA_ORIGIN
Agent Group	Enables data within the reporting interval to be organized by the groups to which agents belong. An agent can belong to more than one agent group.	GROUP_A.GROUP_NAME
Agent Name	Enables data to be organized by certain attributes of the agent who is associated with the interaction.	RESOURCE_A.AGENT_NAME
Day	Enables data within the reporting interval to be organized by a particular day within a month and year. Day values are presented in YYYY-MM-DD format.	FORECAST_DATE_TIME.LABEL_YYYY DATE_TIME.LABEL_YYYY_MM_DD

The following table explains the metrics used on the Interactions Acceptance Dashboard:

### **Metrics on the Interactions Acceptance Dashboard**

Metrics	Description	Source Table or Calculation
Offered	The total number of engagements that were offered to agents. Identical to the metric 'Interactions Initiated by Consumers'.	AG2_CHAT_AGENT_*.OFFERED
Accepted	The total number of assigned engagements that were accepted by agents. Identical to the metric 'Interactions Accepted'.	AG2_CHAT_AGENT.ACCEPTED, AG2_CHAT_AGENT_GRP.ACCEPTED
Acceptance Rate	The percentage of engagements that were accepted by agents. Identical to the metric '% Interactions Accepted'.	Calculated as the value of the Chat > Agent > Offered metric divided by the value of the Chat > Agent > Accepted metric.
Avg Duration for Accepting Interactions	The average amount of time ([H]:MM:SS) that passed after an engagement was offered, before it was accepted by an agent.	Calculated as the value of the Chat > Agent > Alert Duration metric divided by the value of the Chat > Agent > Accepted metric.
Max Duration for Accepting Interactions	The maximum amount of time ([H]:MM:SS) that passed after an engagement was offered, before it was accepted by an agent.	AG2_CHAT_AGENT.INVITE_ACC_TIM AG2_CHAT_AGENT_GRP.INVITE_ACC

% Interactions Less Time to Accept	The percentage of interactions that were accepted by an agent before the amount of time configured as the value of the option accepted-duration-threshold in the agg-gim-thld-CHAT-ACC section.	Calculated as the value of the Chat > Agent > Interactions Less Time to Accept metric divided by the value of the Chat > Agent > Accepted metric.
% Interactions Long Time to Accept	The percentage of interactions that were accepted by an agent after the amount of time configured as the value of the option accepted-duration-threshold in the agg-gim-thld-CHAT-ACC section.	Calculated as the value of the Chat > Agent > Interactions LongTime to Accept metric divided by the value of the Chat > Agent > Accepted metric.

# Interactions Acceptance Report

Use this report to view statistics about the acceptance of interactions by agents, including the amount of time it took for agents to accept interactions, and the number and percentage of interactions that were accepted quickly, or with a delay.

### Understanding the Interactions Acceptance Report

						11	nteractio	ns Accepta	ance Repor	t												
Tenant	Media Type	Media Origin	Agent Group		Agent Name		Day	Interactions Accepted	% Interactions Accepted	Avg Duration for Accepting Interactions (Fmt)	Max Duration for Accepting Interactions (Fmt)	% Interactions Less Time to Accept	% Interactio Long Time t Accept									
							2019-09-18	4	100.00%	00:00:06	00:00:09	100.00%	0.									
				a1002_4002	a1002_4002			2019-09-26	5	100.00%	00:00:08	00:00:13	80.00%	20.								
						a1002_4002	a1002_4002	2019-10-08	6	100.00%	00:00:04	00:00:06	100.00%	0								
			Agnet_grp-2				2019-10-09	4	100.00%	00:00:07	00:00:13	75.00%	25									
							Total	19	100.00%	00:00:06	00:00:41	89.47%	10									
				Total				19	100.00%	00:00:06	00:00:41	89.47%	10.									
							2019-09-13	1	100.00%	00:00:02	00:00:02	100.00%	0									
							2019-09-16	9	90.00%	00:00:20	00:01:05	33.33%	66									
							2019-09-17	2	100.00%	00:00:07	00:00:08	100.00%	(									
							2019-09-18	12	100.00%	00:00:07	00:00:16	75.00%	25									
							2019-09-19	2	100.00%	00:00:08	00:00:12	50.00%	50									
							2019-09-20	3	100.00%	00:00:05	00:00:08	100.00%										
							2019-09-23	6	75.00%	00:00:15	00:00:59	83.33%	10									
		Chat		a1001_4002	a1001	a1001_4002	2019-09-26	7	100.00%	00:00:05	00:00:11	85.71%	1-									
							2019-09-27	1	100.00%	00:00:06	00:00:06	100.00%										
	Customer4					2019-10-01	1	100.00%	00:00:02	00:00:02	100.00%											
		Customer40-02_AgentGrp				2019-10-03	4	100.00%	00:00:09	00:00:11	75.00%	2										
																2019-10-08	18	100.00%	00:00:06	00:00:13	83.33%	1
						2019-10-09	13	92.86%	00:00:07	00:00:14	76.92%	2										
							Total	79	95.18%	00:00:09	00:03:47	75.95%	24									
				a1008_4002 a1008		08_4002 a1008 a			2019-09-19	1	100.00%	00:00:03	00:00:03	100.00%								
ironment	Chat				a1008 a100			2019-09-20	1	100.00%	00:00:08	00:00:08	100.00%									
							8_4002 a1008	a1008_4002	2019-10-08	1	100.00%	00:00:24	00:00:24	0.00%	10							
							2019-10-09	2	100.00%	00:00:11	00:00:16	50.00%	9									
								Total	5	100.00%	00:00:11	00:00:51	60.00%	4								
						Total				84	95.45%	00:00:09	00:04:38	75.00%	25							
			Total					103	96.26%	00:00:08	00:05:19	77.67%	22									
							2019-10-03	1	100.00%	00:00:09	00:00:09	100.00%										
			a10	a1002_4002 a1	002_4002 a1002_4002 a100	002 a1002 4002	2019-10-10	2	100.00%	00:00:08	00:00:13	50.00%	5									
	Agnet_grp-2	Agnet_grp-2				Total	3	100.00%	00:00:08	00:00:22	66.67%	3:										
				Total				3	100.00%	00:00:08	00:00:22	66.67%	3:									
							2019-09-16	1	100.00%	00:00:11	00:00:11	0.00%	10									
		Facebook	Facebook	Facebook				2019-09-30	1	100.00%	00:00:04	00:00:04	100.00%									
				a1001 4002	a1001		2019-10-03	1	100.00%	00:08:14	00:08:14	0.00%	10									
			Customer40-02_AgentGrp		_	2019-10-10	6	100.00%	00:00:07	00:00:11	83.33%	1										

Customer experience is directly impacted if there is a delay before an agent accepts an interaction. Use this report to understand interaction acceptance rate and speed, which can help you to optimize the agent performance and consumer experience.

To get a better idea of what this report looks like, view sample output from the report: InteractionsAcceptanceReport.pdf

The following tables explain the prompts you can select when you generate the report, and the metrics and attributes represented in the report:

## Prompts for the Interactions Acceptance Report

All prompts in this report are optional; run them with no value to return all available data.

Prompt	Description
Pre-set Date Filter	From the list, choose a time period on which to report and move it to the <b>Selected</b> list. Default: Current month. If this prompt is set to anything other than <b>none</b> , the Date prompts are ignored.
Start Date	Choose the first day from which to gather report data. If the Pre-set Date Filter is set to any value except <b>none</b> , this prompt has no effect, unless the time period selected for Pre-set Date Filter contains no data.
End Date	Choose the last day from which to gather report data. If the Pre-set Date Filter is set to any value except <b>none</b> , this prompt has no effect, unless the time period selected for Pre-set Date Filter contains no data.
Media Type	Optionally, select the type of media to include in the report—for example, CHAT, Facebook, Twitter, or SMS. See the table Media Type vs Media Origin for more information.
Tenant	Optionally, select a tenant on which to report.
Agent Group	Optionally, select one or more Agent Groups from which to gather data into the report.
Media Origin	Optionally, select the chat session place of origin—for example, CHAT, Facebook, Twitter, or SMS. See the table Media Type vs Media Origin for more information.

The following table explains how Media Type differs from Media Origin.

### Media Type vs Media Origin

Media	Media Type	Media Origin
Chat	CHAT	Chat
Facebook private messaging	CHAT	Facebook
Facebook public messaging	Facebook	Facebook
Twitter direct message	CHAT	Twitter
Twitter	Twitter	Twitter
SMS	SMS	SMS
WhatsApp	CHAT	WhatsApp

# Attributes used in Interactions Acceptance Report

Attribute	Description	Data Mart Column
Tenant	Enables data within the reporting interval to be organized by tenant.	TENANT.TENANT_NAME
Media Type	Enables data within the reporting interval to be organized by media type—for example, CHAT, Facebook, Twitter, or SMS. See the table Media Type vs Media Origin for more information.	MEDIA_TYPE.MEDIA_NAME
Media Origin	Enables data to be organized by where the chat session originated—for example, CHAT, Facebook, Twitter, or SMS. See the table Media Type vs Media Origin for more information.	MEDIA_ORIGIN.MEDIA_ORIGIN
Agent Group	Enables data within the reporting interval to be organized by the groups to which agents belong. An agent can belong to more than one agent group.	GROUP_A.GROUP_NAME
Agent Name	Enables data to be organized by certain attributes of the agent who is associated with the interaction.	RESOURCE_A.AGENT_NAME
Day	Enables data within the reporting interval to be organized by a particular day.	DATE_TIME.LABEL_YYYY_MM_DD

# Metrics used in the Interactions Acceptance Report

Metric	Description	Source or Calculation
Interactions Accepted	The number of interactions accepted during the reporting period. This metric is identical to Chat > Agent > Accepted.	AG2_CHAT_AGENT.ACCEPTED, AG2_CHAT_AGENT_GRP.ACCEPTED
% Interactions Accepted	Percentage of interactions which were accepted, relative to the total number of interactions initiated by customers. This metric is identical to Chat > Agent > Acceptance Rate.	Calculated as the value of Chat > Agent > Accepted divided by the value of Chat > Agent > Offered.
Avg. Duration for Accepting Interaction	Average amount of time ([H]:MM:SS) that elapsed before agents accepted interactions.	Calculated as the value of Chat > Agent > Alert Duration divided by the value of Chat > Agent > Accepted.

Metric	Description	Source or Calculation
Max. Duration for Accepting Interaction	The maximum amount of time ([H]:MM:SS) that elapsed before an agent accepted an interaction.	AG2_CHAT_AGENT.INVITE_ACC_TIME AG2_CHAT_AGENT_GRP.INVITE_ACC
% Interactions Less Time to Accept	The percentage of interactions that were accepted by an agent before the amount of time configured as the value of the option accepted-duration-threshold in the agg-gim-thld-CHAT-ACC section.	Calculated as the value of the Chat > Agent > Interactions Less Time to Accept metric divided by the value of the Chat > Agent > Accepted metric.
% Interactions Long Time to Accept	The percentage of interactions that were accepted by an agent after the amount of time configured as the value of the option accepted-duration-threshold in the agg-gim-thld-CHAT-ACC section.	Calculated as the value of the Chat > Agent > Interactions LongTime to Accept metric divided by the value of the Chat > Agent > Accepted metric.

# Pre-Agent Termination Report

This page describes how you can use the (**Chat** folder) Pre-Agent Termination Report to learn more about calls that terminated without connecting to an agent.

### Understanding the Pre-Agent Termination Report

Pre-Agent Termination Report

			_			
Day	Sessions Created	Sessions Abandoned	Sessions Offered	Avg Duration Before Abandonment (Fmt)	Max Duration Before Abandonment (Fmt)	% Abandoned Sessions
2011-01-14	56	4	56	00:00:37	00:01:49	7.14%
2011-01-24	162	16	160	00:00:16	00:00:31	9.88%
2011-04-11	23	2	23	00:00:39	00:01:00	8.70%
2011-04-13	8	0	8	00:00:00	00:00:00	0.00%
2011-04-14	3	0	3	00:00:00	00:00:00	0.00%
2011-04-25	2	0	2	00:00:00	00:00:00	0.00%
2011-11-03	9	0	9	00:00:00	00:00:00	0.00%
2011-11-08	18	0	18	00:00:00	00:00:00	0.00%
2011-11-10	8	0	8	00:00:00	00:00:00	0.00%
Total	289	22	287	00:00:22	00:01:49	7.61%

This report shows statistics for interactions that were terminated before connecting to an agent, including:

- · Sessions created
- · Sessions abandoned
- · The average duration before the sessions were abandoned

Use this report to understand the circumstances that led to pre-agent termination of interactions.

To get a better idea of what this report looks like, view sample output from the report: SamplePreAgentTerminationReport.pdf

The following tables explain the prompts you can select when you generate the report, and the metrics and attributes represented in the report:

## Prompts for the Pre-Agent Termination Report

Prompt	Description
Pre-set Date Filter	From the list, choose a time period on which to report, and move it to the <b>Selected</b> list.
Start Date	Choose the first day from which to gather report data.
End Date	Choose the last day from which to gather report data.
Tenant	For multi-tenant environments, optionally select the tenant(s) for which to include data in the report.

# Attributes used in Pre-Agent Termination Report

Attribute	Description
Day	This attribute enables data within the reporting interval to be organized by a particular day.

## Metrics used in the Pre-Agent Termination Report

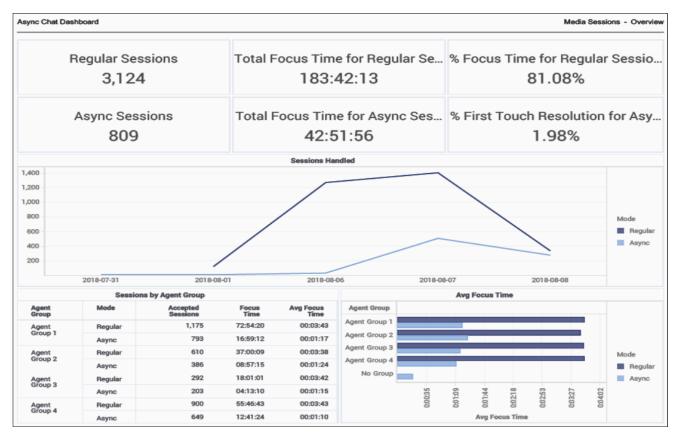
Metric	Description
Sessions Created	The total number of sessions created during the reporting period.
Sessions Abandoned	The number of sessions during the reporting period that were abandoned by the caller before connecting to an agent.
Sessions Offered	The total number of sessions offered during the reporting period.
Avg Duration Before Abandonment (Fmt)	The average duration (HH:MM:SS) of sessions that were subsequently abandoned by the caller without connecting to an agent.
Max Duration Before Abandonment (Fmt)	The maximum length of time(HH:MM:SS) that any caller waited before abandoning the call without connecting to an agent.
% Abandoned Sessions	The percentage of sessions that were abandoned without connecting to an agent, relative to the total number of sessions that were established.

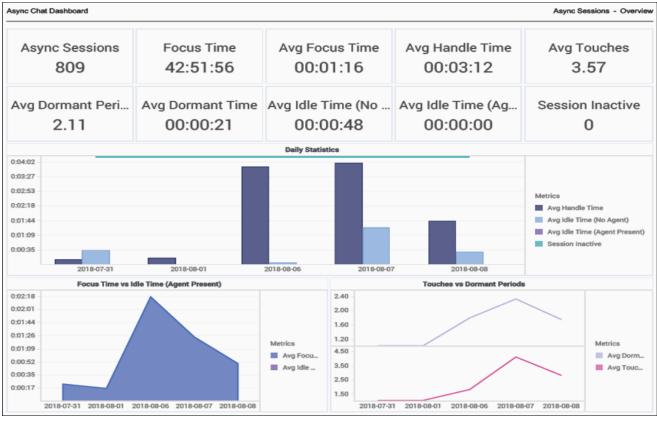
# Asynchronous Chat Dashboard

Use the (**Chat** >) Asynchronous Chat Dashboard to see detailed information about asynchronous (async) chat sessions in the contact center. Async chat sessions are single chat sessions between a customer and a contact center that last for a long period of time (potentially several days). Agents can return a chat session back into the workflow (into a dormant state), and then reconnect to the session later.

Note that this dashboard, like many other reports and dashboards, can provide useful information only if your environment is configured to provide it.

Understanding the Asynchronous Chat Dashboard





Specially designed to capture information about async chat sessions, the dashboard is divided into two tabs:

Media Sessions — This tab provides several tools you can use to compare the number and relative focus
time for regular versus Async chat sessions, and to compare the relative performance of agent groups.
It includes three handy charts illustrating the number of sessions handled over a period of days,
comparing the number of sessions handled by various agent groups, and comparing the average focus
time for various agent groups.

Async Sessions — This tab provides more detailed information about Async sessions, helping you to
understand how customers experience Async chat sessions. It includes charts that illustrate several
statistics, including Handle Time, Session Inactive Time, Idle Time (as compared to Focus Time), and
compares Touches to Dormant Periods.

Note that this dashboard displays information only about *completed* async chat sessions. You can view not-yet-completed chat sessions in other Genesys CX Insights chat reports, which combine metrics for regular or async sessions without distinguishing between the two.

Use this dashboard to evaluate the relative efficiency of async chat sessions, compared to regular chat sessions, and to understand how agents interact with Async chat sessions in your contact center.

To get a better idea of what this dashboard looks like, view sample output from the dashboard: HRCXIAsynchronousChatDashboard.pdf

The following tables explain the prompts you can select when you generate the dashboard, and the attributes and metrics that are represented in the dashboard:

### Prompts for the Asynchronous Chat Dashboard

Prompt	Description
Pre-set Date Filter	From the list, choose a time period on which to report, and move it to the Selected list.
Start Date	Choose the first day from which to gather report data.
End Date	Choose the last day from which to gather report data.
Media Type	Optionally, select the type of media to include in the dashboard — for example, VOICE, EMAIL, and CHAT.
Tenant	For multi-tenant environments, optionally select the tenant(s) for which to include data in the dashboard.

# Attributes used in the Asynchronous Chat Dashboard

Attribute	Description
Day	This attribute enables data within the reporting interval to be organized by a particular day within a month and year. Day values are presented in YYYY-MM-DD format.
Media Type	This attribute enables data to be organized by the interaction's media type—for example, Voice, Email, and Chat.
Mode	This attribute enables data to be organized by the mode (Regular or Async).
Tenant	This attribute enables data within the reporting interval to be organized by tenant.

## Metrics used in the Asynchronous Chat Dashboard

The Asynchronous Chat Dashboard is divided into two tabs:

- Media Sessions
- Async Sessions

Metric	Description
Media Sessions tab	
Regular Sessions	The total number of online chat sessions started within the reporting period.
Total Focus Time for Regular Sessions	The total amount of time (HH:MM:SS), during the reporting period, that agents spent handling regular chat interactions received by the agent or agent group.
% Focus Time for Regular Sessions	The percentage of agent time, during the reporting period, that agents spent handling Async chat interactions received by the agent or agent group.
Async Sessions	The total number of Async chat sessions started within the reporting period.
Total Focus Time for Async Sessions	The total amount of time (HH:MM:SS), during the reporting period, that agents spent working on Async chat sessions.
% First Touch Resolution for Async Sessions	The percentage of Async chat sessions that were handled with one touch. This metric counts sessions that were either never placed in dormant state, were placed in a dormant state once, and never woken from that state, and includes sessions whether ended by agent, customer, or by timeout.
Sessions Handled	The total number of online chat sessions started

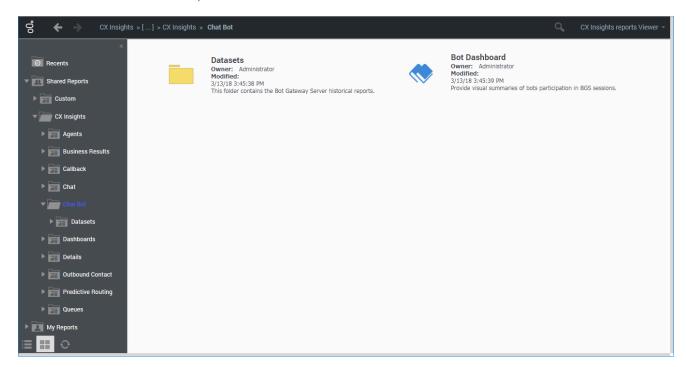
Metric	Description
	within reported period.
Avg Focus Time	The average amount of time (HH:MM:SS), spent handling chat interactions received by agent(s).
Async Sessions tab	
Async Sessions	The total number of Async chat sessions started within the reporting period.
Focus Time	The total amount of time (HH:MM:SS) spent handling Async chat interactions received by Agent(s) or Agent Group(s). This metric excludes dormant time.
Avg Focus Time	The average amount of time (HH:MM:SS), spent handling Async chat interactions received by Agent(s).
Avg Handle Time	The average duration (HH:MM:SS) of Async chat sessions.
Avg Touches	The average number of times sessions were in active state (not dormant).
Avg Dormant Period	The average number of times sessions entered a dormant state during the reporting period.
Avg Dormant Time	The average amount of time (HH:MM:SS) that customer interactions ware in the dormant state or on hold (with no Agent participant). Routing time is excluded from dormant time.
Avg Idle Time (no Agent)	The average amount of time (HH:MM:SS), exceeding the configured threshold, with no activity when interaction was in the active state and no agents were participating in the chat.
Avg Idle Time (Agent Present)	The average amount of time (HH:MM:SS), exceeding the configured threshold, with no activity when interaction was in the active state and at least one agent was participating in the chat.
Session Inactive Time	The total amount of time that sessions were inactive during the reporting period.
Focus Time	The total amount of time (HH:MM:SS) spent handling (excluding dormant time) Async chat interactions received by Agent(s) or Agent Group(s).
Idle Time (Agent Present)	The total amount of time (HH:MM:SS), with no activity, when interaction was in the active state and at least one agent was participating in the chat. This metric counts only the time that exceeds the configured threshold.

# Chat Bot reports and dashboards

This page describes reports or dashboards you can use to learn more about chat bot volumes, statistics, and outcomes in your contact center. Reports in the **Chat Bot** folder are ready-to-use, but as always, can be modified to suit your specific business needs.

Reports in this folder require that specific RAA options be enabled: enable-bgs. For more information, see the *Genesys CX Insights Deployment Guide*.

### About Chat Bot reports



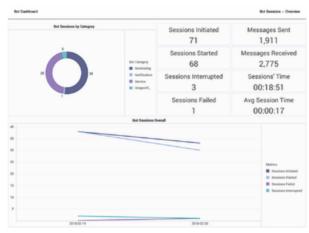
The following reports / dashboards are available in the **CX Insights** > **Chat Bot** folder:

Bot Dashboard

#### **Related Topics:**

- Go back to the complete list of available reports.
- Learn how to understand and use reports.
- Learn how to create or customize reports.

# Bot Dashboard



Bot Dashboard — Bot Sessions

The Bot Dashboard provides a dashboard-style summary that you can use to evaluate the impact of Chat Bot, including visualizations of session and message volumes, and breaks down sessions based on whether bots, agents, or both, were involved. The dashboard report organizes data on the following tabs:

- The Bot Sessions tab provides an overall view of bot sessions, including information about:
  - · Session durations
  - · How many sessions were initiated, started, interrupted, or failed
  - Information about the number of messages sent and received by bots.
- The Media Sessions tab focuses on media sessions, contrasting the number of media sessions with the number (and percentage) of sessions with bots, and with the number of sessions (and percentage) with bots only.

Note that the term 'dashboard' is used interchangeably with the term 'dossier'. Dashboards / dossiers provide an interactive, intuitive data visualization, summarizing key business indicators (KPIs). You can change how you view the data by using interactive features such as selectors, grouping, widgets, and visualizations, and explore data using multiple paths, though text, data filtering, and layers of organization.



Bot Dashboard — Media Sessions

To get a better idea of what this dashboard looks like, view sample output from the report: Sample Bot Dashboard.pdf

The following table explains the prompts you can select when you generate the Bot Dashboard:

#### **Prompts on the Bot Dashboard**

Prompt	Description
Pre-set Date Filter	Choose a date from the list of preset options. If this prompt is set to anything other than <b>none</b> , the Report Date prompt is ignored.
Start Date	Choose the first date on which to report. This prompt has no effect if Pre-set Date Filter is set to anything other than <b>none</b> .
End Date	Choose the last date on which to report. This prompt has no effect if Pre-set Date Filter is set to anything other than <b>none</b> .
Bot Category	Select one or more generic bot categories to include in the report.
Media Type	Select one or more media types for which to gather data into the report.
Tenant	Select one or more tenants to include in the report.

### Bot Sessions tab

The Bot Sessions tab provides an overall view of bot sessions, including information about session durations, about how many sessions were initiated, started, interrupted, or failed, as well as information about the number of messages sent and received by bots.

The following table explains the metrics used on the Bot Sessions tab:

#### Metrics on the Bot Dashboard / Bot Sessions tab

Metric	Description
Sessions Initiated	The total number of initiated BGS sessions. Includes all sessions where an initial request was sent from Ixn/workflow to BGS.
Sessions Started	The total number of BGS sessions where a connection was established between Bot and Chat Session.
	The total number of bot sessions interrupted by the client (for example, because the chat session had no human participants).
Sessions Interrupted	<ul> <li>In deployments with RAA release 9.0.001.10 or later, this metric is defined as: ENDED_BY = 'CBP' and ENDED_REASON = 'ALL_CLIENTS_LEFT'.</li> </ul>
	<ul> <li>In deployments with RAA release 9.0.001.07 or earlier, it was defined as: ENDED_BY = 'Client'.</li> </ul>
Sessions Failed	The total number of failed bot sessions that were interrupted during execution, due to technical issues. (ENDED_ABNORMALLY = 1).
Messages Sent	The total number of messages sent by bots during BGS sessions.
Messages Received	The total number of messages received by bots during BGS sessions.
Sessions' Time	The total duration of bot sessions within the reporting period.
Avg Session Time	The average duration of bot sessions.

### Media Sessions tab

The Media Sessions tab focuses on media sessions, contrasting the number of media sessions with the number (and percentage) of sessions with bots, and with the number of sessions (and percentage) with bots only.

The following table explains the metrics used on the Media Sessions tab:

#### Metrics on the Bot Dashboard / Media Sessions tab

Metric	Description
Media Sessions	The total number of media sessions.
Bot Sessions	The total number of bot sessions.
Sessions with Bots	The total number of media sessions in which bots participated.
Avg Bots per Session with Bots	Avg Number of Bot Gateway Server (BGS) sessions

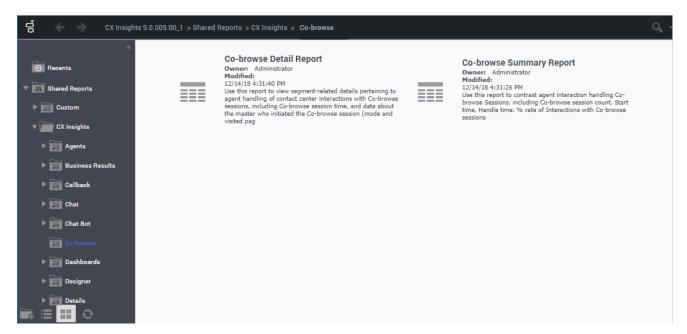
	per Media session in which bots participated.
% Sessions with Bots	The percentage of media sessions in which bots participated.
% Sessions Only with Bots	The percentage of media sessions handled by bots, without agent involvement.

Report descriptions Co-browse reports

# Co-browse reports

This page describes reports you can use to learn more about agent handling of contact center interactions involving Co-browse sessions. Reports in the **Co-browse** folder are ready-to-use, but as always, can be modified to suit your specific business needs.

### About Co-browse reports



The following reports are available in the **CX Insights** > **Cobrowse** folder:

- · Co-browse Detail Report
- Co-browse Summary Report

#### **Related Topics**:

- Go back to the complete list of available reports.
- · Learn how to understand and use reports.
- · Learn how to create or customize reports.

Report descriptions Co-browse reports

# Co-browse Detail Report

Use this report to view segment-related details pertaining to agent handling of contact center interactions that include Co-browse sessions. The report provides detailed information about Co-browse sessions, including durations, browsing modes, and pages visited.

### Understanding the Co-browse Detail Report

								Co-bro	wse De	tail Repo	ort									
Media Type	Handling Agent Name	Queue	VQueue	Interaction ID	Interaction Start Time	Interaction End Time	Interaction Duration	Co-browse Session ID	Co-browse Start Time	Co-browse End Time	Co-browse Duration	Mode Start Time	Mode	Mode End Time	Page Start Time	Page Title	Page Url	Page End Time		
							00:00:57	505545278	9/10/2018 4:01:18 PM		7/10/2018 00:00:32	9/10/2018 4:01:18 PM	POINTER	9/10/2018 4:01:30 PM	9/10/2018 4:01:18 PM	simplestyle_b anner - contact us	http://127.0. 0.1:8091/cont act.html	9/10/2018 4:01:30 PM		
				219350	9/10/2018 4:00:59 PM	9/10/2018 4:01:56 PM						9/10/2018	WRITE	9/10/2018	9/10/2018 4:01:30 PM	simplestyle_b anner - contact us	http://127.0. 0.1:8091/cont act.html	9/10/2018 4:01:45 PM		
												4:01:30 PM	MALLE	4:01:50 PM	9/10/2018 4:01:45 PM	simplestyle_b anner - examples	http://127.0. 0.1:8091/exam ples.html	9/10/2018 4:01:50 PM		
												9/11/2018	DOINTER	9/11/2018	9/11/2018 2:06:58 PM	simplestyle_b anner - contact us	http://127.0. 0.1:8091/cont act.html	9/11/2018 2:07:17 PM		
													2:06:58 PM	POINTER	2:08:15 PM	9/11/2018 2:07:17 PM	simplestyle_b anner - a page	http://127.0. 0.1:8091/page .html	9/11/2018 2:08:15 PM	
		225350 9/11/2018 9/11/2018 00:02:41 541168927 9/11/2018 9/11/2018 2:08:59 FM 2:08:40 FM 25	9/11/2018 2:08:32 PM					9/11/2018 2:08:15 PM	simplestyle_b anner - a page	http://127.0. 0.1:8091/page .html	9/11/2018 2:08:22 PM									
Chat	, Agent2 E-mail (Agent2) distribution	E-mail distribution										9/11/2018 2:08:15 PM	WRITE	9/11/2018 2:08:32 PM	9/11/2018 2:08:22 PM	anner -	http://127.0. 0.1:8091/anot her_page.html	9/11/2018 2:08:27 PM		
															9/11/2018 2:08:27 PM	simplestyle_b anner - examples	http://127.0. 0.1:8091/exam ples.html	9/11/2018 2:08:32 PM		
								577527996	9/13/2018 11:27:08 AM	9/13/2018 11:34:35 AM	00:07:27	9/13/2018 11:27:08 AM	POINTER	9/13/2018 11:34:35 AM	9/13/2018 11:27:08 AM	simplestyle_b anner	http://127.0. 0.1:8091/	9/13/2018 11:34:35 AM		
				227350	9/13/2018 11:19:43 AM	9/13/2018 2:38:45 PM	03:19:02	03:19:02	03:19:02	645918851	9/13/2018 11:35:01 AM	9/13/2018 11:37:45 AM	00:02:44	9/13/2018 11:35:01 AM	POINTER	9/13/2018 11:37:45 AM	9/13/2018 11:35:01 AM	simplestyle_b anner	http://127.0. 0.1:8091/	9/13/2018 11:37:45 AM
								883284854	9/13/2018 11:20:36 AM	9/13/2018 11:20:51 AM	00:00:15	9/13/2018 11:20:36 AM	POINTER	9/13/2018 11:20:51 AM	9/13/2018 11:20:36 AM	simplestyle_b	http://127.0. 0.1:8091/	9/13/2018 11:20:51 AM		
				265350	9/17/2018 12:15:53 PM	9/17/2018 1:47:09 PM	01:31:16	415180427	9/17/2018 12:16:25 PM	9/17/2018 12:16:35 PM	00:00:10	9/17/2018 12:16:25 PM	POINTER	9/17/2018 12:16:35 PM	9/17/2018 12:16:25 PM	simplestyle_b	http://127.0. 0.1:8091/	9/17/2018 12:16:35 PM		
																	9/17/2018 1:48:18 PM	simplestyle_b	http://127.0. 0.1:8091/	9/17/2018 1:48:30 PM
	· ·	267350	9/17/2018 1:47:30 PM	10/17/2018 1:47:30 PM	720:00:00	876359987	9/17/2018 1:48:18 PM	9/17/2018 1:48:35 PM	00:00:17	9/17/2018 1:48:18 PM	POINTER	9/17/2018 1:48:35 PM	9/17/2018 1:48:30 PM	simplestyle_b anner - examples	http://127.0. 0.1:8091/exam ples.html	9/17/2018 1:48:35 PM				
Voice	, Agent3	3		NONE	40149	9/12/2018	9/12/2018		534718679	9/12/2018 9:11:35 AM	9/12/2018 9:11:45 AM	00:00:10	9/12/2018 9:11:35 AM	POINTER	9/12/2018 9:11:45 AM	9/12/2018 9:11:35 AM	simplestyle_b anner - examples	http://127.0. 0.1:8091/exam ples.html		
10100	(Agent3) NORE NORE 40147 9:10:43 AM 9:12:34 AM 00101:31	629427843	9/12/2018 9:12:04 AM	9/12/2018 9:12:14 AM	00:00:10	9/12/2018 9:12:04 AM	POINTER	9/12/2018 9:12:14 AM	9/12/2018 9:12:04 AM	simplestyle_b anner - examples	http://127.0. 0.1:8091/exam ples.html	9/12/2018 9:12:14 AM								

This report provides detailed information about Co-browse sessions, on an agent-by-agent bases, including Interaction durations, Co-browse session durations, Co-browse modes, and details about the pages visited.

To get a better idea of what this report looks like, view sample output from the report: Sample Co-browse Detail Report.pdf

The following tables explain the prompts you can select when you generate the report, and the metrics and attributes represented in the report:

### Prompts for the Co-browse Detail Report

All prompts in this report are optional; run them with no value to return all available data.

Prompt	Description
Pre-set Day Filter	Choose a day from the list of preset options. This

Prompt	Description
	prompt overrides the Start Time and End Time values.
Start Time	Choose the day and time from which to begin collecting data into the report. This prompt has no effect if <b>Pre-set Day Filter</b> is set to anything except <b>None</b> .
End Time	Choose the day and time at which to stop collecting data into the report. This prompt has no effect if <b>Pre-set Day Filter</b> is set to anything except <b>None</b> .
Agent Name	Choose an agent on which to focus the report.
Last Queue	From the list, choose a queue on which to focus the report. The report will include only interactions that traveled through the selected queue immediately before the interaction was handled.
Last VQueue	From the list, choose a virtual queue on which to focus the report. The report will include only interactions that traveled through the selected queue immediately before the interaction was handled.
Media Type	Optionally, select the type of media to include in the report—for example, VOICE or CHAT.
Interaction ID	Optionally, select an Interaction ID on which to focus the report.

# Attributes used in Co-browse Detail Report

Attribute	Description
Media Type	This attribute enables data within the reporting interval to be organized by the media type from which the Co-browse session was initiated (voice or chat).
Handling Agent Name	This attribute enables data within the reporting interval to be organized by the name of the Agent who assisted the customer in the co-browse session.
Queue	This attribute enables data within the reporting interval to be organized by the Queue from where the Co-browse interaction was routed to an agent. Co-browse is a part of the voice or chat interaction, so technically the primary interaction routed is voice or chat.
VQueue	This attribute enables data within the reporting interval to be organized by the Queue from where the Co-browse interaction was routed to an agent. Co-browse is a part of the voice or chat interaction, so technically the primary interaction routed is

Co-browse reports

Attribute	Description
	voice or chat.

# Metrics used in the Co-browse Detail Report

Metric	Description	Metric source
Interaction ID	Interaction ID of the voice or chat.	INTERACTION_FACT_GI2.INTERACTION_ID
Interaction Start Time	Interaction Start Time of the voice or chat.	INTERACTION_FACT_GI2.START_TS_TIME
Interaction End Time	Interaction End Time of the voice or chat.	INTERACTION_FACT_GI2.END_TS_TIME
Interaction Duration	The duration of the interaction that started and ended.	Calculated as interaction end time minus interaction start time (END_TS - START_TS).
Co-browse Session ID	The unique identifier of the Cobrowse session.	COBROWSE_FACT_GI2.SESSION_TOKEN
Co-browse Start Time	The time when the Co-browse session started. Each interaction can contain multiple Co-browse sessions.	COBROWSE_FACT_GI2.SESSION_START_TIME
Co-browse End Time	The time when the Co-browse session ended. Each interaction can contain multiple Co-Browse sessions.	COBROWSE_FACT_GI2.SESSION_END_TIME
Co-browse Duration	The duration of the co-browse session.	Calculated as Co-browse session end time minus Co-browse session start time (SESSION_END_TIME_TS - SESSION_START_TIME_TS).
Mode Start Time	The start time of the mode in the Co-browse session. A Co-browse session can contain multiple mode sessions.	COBROWSE_FACT_GI2.SEGMENT_START_TIM
Mode	The mode (POINTER or WRITE) that was used in the session. In POINTER sessions, the agent observes while the caller browses the web page, whereas in WRITE sessions, the agent can actively click or enter data on the web page.	COBROWSE_MODE.SEGMENT_MODE
Mode End Time	The end time of the mode in the Co-browse session. A Co-browse session can contain multiple mode sessions.	COBROWSE_FACT_GI2.SEGMENT_END_TIME

Metric	Description	Metric source	
	loaded or reloaded during the Co-browse session.		
Page Title	The title of the Web page on which the Co-browse session happens. The report shows one entry for each page co-browsed during the session.	COBROWSE_PAGE.PAGE_TITLE	
Page URL	The URL of the Web page on which the Co-browse session happens. The report shows one entry for each page co-browsed during the session.	COBROWSE_FACT_GI2.PAGE_START_	_TIME
Page End Time	The time when the Co-browse session moved to the next page, or ended.	COBROWSE_FACT_GI2.PAGE_END_TI	IME

Report descriptions Co-browse reports

# Co-browse Summary Report

Use this report to learn how each agent handles interactions involving Co-browse sessions, by contrasting Co-browse session counts, session durations, and the percentage of interactions that include Co-browse.

### Understanding the Co-browse Summary Report

				Co-browse Su	ımmary Report				
Media Type	Agent Name	Day	Interaction Count	Interaction s with Co- browse	Co-browse Sessions	% Rate of Co-browse	Co-browse Write Sessions	Avg Before Co-browse Started Time (Fmt)	Avg Handle Time (Fmt)
	, Agent1 (Agent1)	2018-09-17	1	0	0	0.00%	0		
		2018-09-10	2	2	2	100.00%	1	00:00:18	00:00:
		2018-09-11	3	1	1	33.33%	1	00:00:59	00:01:
Chat	, Agent2 (Agent2)	2018-09-13	1	1	3	100.00%	0	00:00:53	00:03:
		2018-09-15	3	0	0	0.00%	0		
		2018-09-17	16	2	2	12.50%	0	00:00:40	00:00:
	Total		26	6	8	23.08%	2	00:00:38	00:01:
		2011-04-11	9	0	0	0.00%	0		
	, A6001_sip (A6001_sip)	2011-04-13	2	0	0	0.00%	0		
		2011-11-10	3	0	0	0.00%	0		
		2011-01-14	35	0	0	0.00%	0		
		2011-01-24	44	0	0	0.00%	0		
		2011-04-13	1	0	0	0.00%	0		
		2011-04-14	2	0	0	0.00%	0		
		2011-04-25	4	0	0	0.00%	0		
	, Agent1 (Agent1)	2011-11-10	1	0	0	0.00%	0		
<i>l</i> oice		2017-12-04	6	0	0	0.00%	0		
0100		2017-12-05	1	0	0	0.00%	0		
		2017-12-06	3	0	0	0.00%	0		
		2017-12-15	17	0			0		

This report provides a summary view of Co-browse session volumes, by agent, including interaction volumes, the number and percentage of interactions that included Co-browse sessions, handle times, and other key metrics.

To get a better idea of what this report looks like, view sample output from the report: Sample Co-browse Summary Report.pdf

The following tables explain the prompts you can select when you generate the report, and the attributes and metrics represented in the report:

Report descriptions Co-browse reports

# Prompts for the Co-browse Summary Report

All prompts in this report are optional; run them with no value to return all available data.

Prompt	Description
Pre-set Date Filter	From the list, choose a time period on which to report, and move it to the <b>Selected</b> list. Default: Current month. If this prompt is set to anything other than <b>none</b> , the Date prompts are ignored.
Start Date	Choose the first day from which to gather report data. If the Pre-set Date Filter is set to any value except <b>none</b> , this prompt has no effect, unless the time period selected for Pre-set Date Filter contains no data.
End Date	Choose the last day from which to gather report data. If the Pre-set Date Filter is set to any value except <b>none</b> , this prompt has no effect, unless the time period selected for Pre-set Date Filter contains no data.
Agent	Optionally, select an agent on which to focus the report.
Media Type	Optionally, select the type of media to include in the report—for example, VOICE or CHAT.

## Attributes used in the Co-browse Summary Report

Attribute	Description
Media Type	This attribute enables data within the reporting interval to be organized by the media type where Co-browse was provided (voice or chat).
Agent Name	This attribute enables data within the reporting interval to be organized by the name of the agent who assisted the customer in the Co-browse session.
Day	This attribute enables data within the reporting interval to be organized by the day on which the Co-browse session was initiated. You can drill on this attribute to Hour, 30 Min, or 15 Min.

# Metrics used in the Co-browse Summary Report

Metric	Description	Metric source
Interaction Count	The total number of voice or chat interactions that were accepted by the agent (regardless of	AG2_COBROWSE_AGENT.ENTERED

Metric	Description	Metric source
	whether Co-browse sessions were part of the interaction).	
Interactions with Co-browse	The total number of voice or chat interactions that were accepted by the agent, and which included one or more Co-browse sessions.	AG2_COBROWSE_AGENT.INTERACTIONS
Co-browse Sessions	The total number of Co-browse sessions. One interaction with Co-browse can be counted as many Co-browse sessions.	AG2_COBROWSE_AGENT.SESSIONS
% Rate of Co-browse	The percentage of interactions with Co-browse, compared to the total number of interactions. Note that the total number of Cobrowse interactions is a count of interactions, not sessions.	Calculated as the total number of Co-browse interactions divided by the total number of accepted interactions (INTERACTIONS / ENTERED).
Co-browse Write Sessions	The total number of Co-browse sessions with WRITE mode. Sessions are in either POINTER or WRITE mode. In POINTER sessions, the agent observes while the caller browses the web page, whereas in WRITE sessions, the agent can actively click the web page or enter data.	AG2_COBROWSE_AGENT.RW_SESSIONS
Avg Before Co-browse Started Time (Fmt)	The average amount of time between the beginning of an interaction and the initiation of the first Co-browse session.	Calculated as the Co-browse first wait time (first Co-browse session start time minus the interaction start time), divided by the number of Co-browse sessions (FIRST_WAIT_TIME / SESSIONS).
Avg Handle Time (Fmt)	The average amount of time (HH:MM:SS) that this agent spent handling Co-browse sessions	Calculated as the handle time divided by the number of Cobrowse sessions (HANDLE_TIME / SESSIONS).

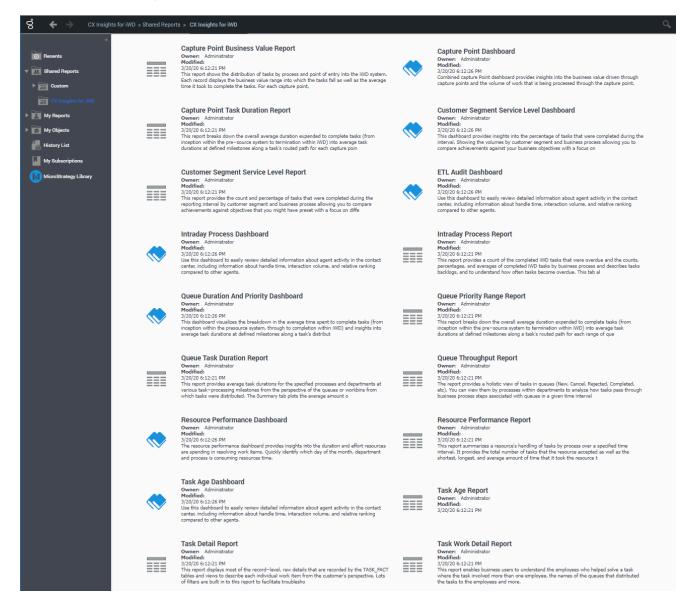
# CX Insights for iWD reports

This page describes reports in the **CX Insights for iWD** project, which is separate from the regular **CX Insights** project.

The **CX Insights for iWD** project **Shared Reports** folder contains just two folders: **Custom** and **CX Insights for iWD**, the latter of which contains reports you can use to learn more about contact center interactions involving Genesys Info Mart and intelligent Workload Distribution (iWD).

Reports in the **CX Insights for iWD** folder are ready-to-use, but as always, can be modified to suit your specific business needs.

## About iWD reports



The following reports and dashboards are available in the CX Insights for iWD folder:

- Capture Point Business Value Report
- Capture Point Dashboard
- · Capture Point Task Duration Report
- Customer Segment Service Level Report
- Customer Segment Service Level Dashboard
- · ETL Audit Dashboard

- · Intraday Process Dashboard
- Intraday Process Report
- · Queue Throughput Report
- Queue Duration and Priority Dashboard
- · Queue Priority Range Report
- Queue Task Duration Report
- · Resource Performance Dashboard
- Resource Performance Report
- · Task Age Dashboard
- Task Age Report
- Task Detail Report
- Task Work Detail Report

### Before using the iWD reports

The Genesys CX Insights reporting solution for iWD Data Mart uses an abstract model pre-built on Microstrategy server, which requires that underlying aggregate plug-in tables exist in the iWD Data Mart database schema.

Before you can use Genesys CX Insights for iWD reports, you must:

- 1. Enable five plugins: Classification, Capture, Queue, Age and Agent. For more information, see the following sections in the *intelligent Workload Distribution Data Mart Reference Guide*:
  - Release 9.0.0: Activating iWD Aggregate Plugins
  - Release 8.5.1: Activating iWD Aggregate Plugins
- 2. Restart the iWD Runtime Node. The appropriate database objects are automatically created.

### General comments about the iWD reports

The information in this section can help you understand the CX Insights for iWD reports.

#### Averages

Averages in the reports that report 0 (zero) values indicate either 0 duration or 0 count. For example, an average hold time of 0 could signify either that interactions were placed on hold for 0 seconds, or that no interactions were placed on hold at all during the reporting interval. AverageHoldTime = Activity(HoldTime)/Activity(Hold) = 0

#### Definition of queue

When used for intelligent Workload Distribution (iWD), the term *queue* refers to the following mediation DN types:

- Interaction queue
- Workbin
  - · Agent workbin
  - · Agent group workbin
  - Place workbin
  - · Place group workbin

### Viewing the day's activities

The accuracy of the reports for viewing the current day's activities depends on when transformation and aggregation completes throughout a day and how soon you run the reports. Refer to Optimal Time to Run Reports for additional information about the timing of running reports.

#### **Related Topics**:

- Go back to the complete list of available reports.
- Learn how to understand and use reports.
- · Learn how to create or customize reports.

# Capture Point Business Value Report

This page describes how you (as a business user) can use the (**CX Insights for iWD** folder) **Capture Point Business Value Report** to understand the distribution of tasks by process and point of entry (capture point) into the iWD system. You can use this information to assess whether the time to complete tasks correlates with the desired business value and time to complete for a busy enterprise, which can help you to better tune priority schema and priority levels for processes, capture points and departments.

### Understanding the Capture Point Business Value Report

Tenant	Capture Point	Department	Process	Media Type	Business Value Range 100	Day	Entered	Finished	Avg Accept Time (Fmt)	Avg Finish Time (Fmt)								
					2020-07-31	16	0	00:00:00	00:00:00									
					401-500	2020-08-01	0	0	00:00:00	00:00:00								
			3.3	workitem	401-500	2020-08-02	0	16	48:00:40	48:03:0								
			Advertising			2020-08-03	0	16	48:00:40	72:00:1								
					Total		16	32	48:00:40	60:01:4								
				Total			16	32	48:00:40	60:01:4								
					501 700	2020-07-31	17	17	07:00:16	07:02:4								
				workitem	601-700	2020-08-01	0	17	07:00:16	24:00:0								
			Newsletter		Total		17	34	07:00:16	15:31:2								
En	Email Marketing		Total			17	34	07:00:16	15:31:2									
			Promotion  Retention	workitem	401-500	2020-07-31	15	30	04:00:19	07:01:2								
					Total		15	30	04:00:19	07:01:2								
				Total			15	30	04:00:19	07:01:2								
selenium	inx_server_1_jmscp					2020-07-31	10	10	00:25:18	00:28:2								
				Retention	Retention	Retention	Retention	workitem	801-900	2020-08-01	0	10	00:25:18	12:00:2				
										Retention	Recention		Total		10	20	00:25:18	06:14:2
										Total			10	20	00:25:18	06:14:2		
			Total				58	116	16:24:22	24:00:0								
							2020-07-31	11	11	08:00:16	08:03:4							
					workitem	1501-1600 rkitem	2020-08-01	0	11	08:00:16	24:00:2							
			Blogs / News Portals		Total		11	22	08:00:16	16:02:0								
				Total			11	22	08:00:16	16:02:0								
		Online Presence	ce			2020-07-31	10	10	02:00:18	02:03:3								
				Forums	Forums				workitem	701-800	2020-08-01	0	10	02:00:18	12:00:2			
			Forums				Total		10	20	02:00:18	07:02:0						
				Total			10	20	02:00:18	07:02:0								
			Online Advertisements	workitem			10	0	00:00:00	00:00:0								

For each record, the report displays the business value range into which the tasks fall as well as the average time that it took to complete the tasks. For each capture point, the report plots the total number of finished tasks against their assigned business value range.

Although this report is defined using the Business Value Range attribute, you can drill along this attribute to display larger ranges in which business value of the task capture falls.

To get a better idea of what this report looks like, view sample output from the report: SampleCapturePointBusinessValueReport.pdf

The following tables explain the prompts you can select when you generate the report, and the metrics and attributes that are represented in the report:

### Prompts in the Capture Point Business Value Report

Prompt	Description
Pre-set Date Filter	Choose from the convenient list of predefined rolling time ranges, spanning one day or more, over which to run the report.
Start Time	Choose the first day and time from which to gather report data.
End Time	Choose the last day and time from which to gather report data.
Department	Optionally, select a department on which to focus the report.
Process	Optionally, select a business process on which to focus the report.
Capture Point	Optionally, select a Capture Point on which to focus the report.
Tenant	Optionally, select a tenant on which to focus the report.
Media Type	Optionally, select one or more media types for which to gather data into the report.

### Attributes in the Capture Point Business Value Report

Attribute	Description	Data Mart Table.Column
Tenant	Enables data within the reporting interval to be organized by tenant.	TENANT.TENANT_NAME
Department	Enables data to be organized by the name of the department for which iWD prioritizes and routes tasks.	DEPARTMENT.DEPARTMENT_NAME
Capture Point	Enables data to be organized by the name of the capture point that acquired tasks from the source system.	CAPTURE_POINT.CAPTURE_POINT_NA

Attribute	Description	Data Mart Table.Column
Process	Enables data to be organized by the name of the business process, which is a core attribute of tasks and work items that define strategies for how to route them.	PROCESS_PROCESS_NAME
Media Type	Enables data to be organized by media type.	MEDIA_TYPE.MEDIA_TYPE_NAME
Business Value Range 100	Enables data to be organized by the range in which the business value of the task capture falls.  Ranges are character values that have a granularity of 100—for example: 1–100, 101–200, 201–300.	BUSINESS_VALUE.BUSINESS_VALUE
Day	Enables data within the reporting interval to be organized by a particular day within a month and year. Day values are presented in YYYY-MM-DD format.	DATE_TIME.LABEL_YYYY_MM_DD

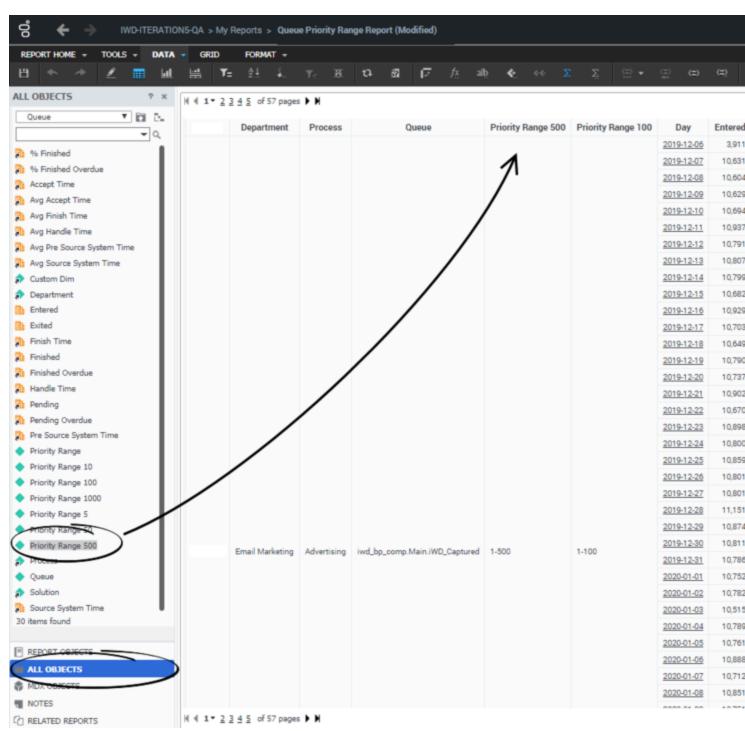
# Metrics in the Capture Point Business Value Report

Metric	Description	Source or Calculation
Entered	The total number of new tasks that entered the iWD system through this capture point during the reporting interval.	IWD_AGG_TASK_CAPT_[Y,Q,M,W,D,H,15].NEW
Finished	The total number of tasks that entered the iWD system through this capture point and were completed during the reporting interval.	IWD_AGG_TASK_CAPT_[Y,Q,M,W,D,H,15].CMP
Avg Finish Time (Fmt)	The average amount of time that elapsed before tasks that entered the iWD system through this capture point were completed. This measure includes the time that tasks were backlogged as well as work time.	Calculated based on the value of the Finish Time and Finished metrics, where:  • Finish Time is:  IWD_AGG_TASK_CAPT_[Y,Q,M,W,D,H,15].0  • Finished is:  IWD_AGG_TASK_CAPT_[Y,Q,M,W,D,H,15].0
Avg Accept Time (Fmt)	For completed tasks, the average amount of time that elapsed before tasks that entered the iWD system through this capture point were assigned to a resource for the first time. This	Calculated based on the value of the Accept Time and Finished metrics, where:  • Accept Time is:  IWD_AGG_TASK_CAPT_[Y,Q,M,W,D,H,15].0

Metric	Description	Source or Calculation
	metric reflects how long, on average, tasks were backlogged.	<ul> <li>Finished is: IWD_AGG_TASK_CAPT_[Y,Q,M,W,</li> </ul>

## Customizing the report

Some dashboards contain attributes representing different granularity of an attribute, such as Priority Range, or Business Value. You can change the granularity of the data shown in the report by replacing this attribute with another; this procedure uses Business Value Range in the Capture Point Business Value Report as an example.



Changing the granularity of the report data

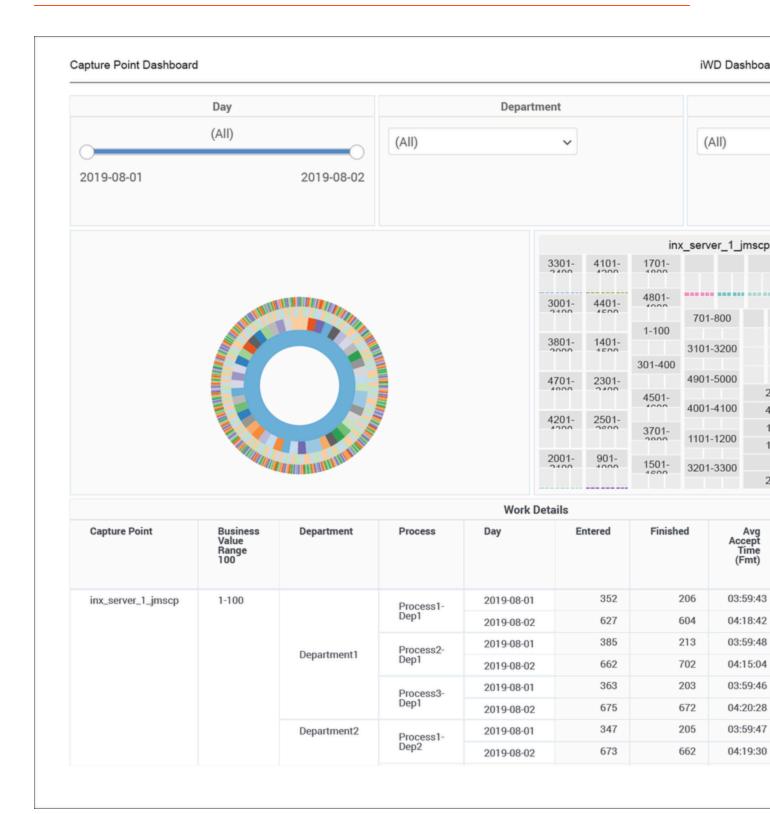
### Procedure: Changing the granularity of the report data

**Purpose:** Change the granularity range of an attribute. In this example, we change the Capture Point Business Value Report, which by default is configured to use the "Business Value Range 100" attribute.

#### Steps

- 1. Log in with an account having Administrator privileges.
- 2. Open and run the report. It's best to modify a copy of the report, rather than the original:
  - 1. Click **Report Home > Save As**.
  - 2. In the Save As editor:
    - 1. In the **Save in** list, choose one of the following paths:
      - **Shared Reports** > **Custom** to make the modified report accessible to other users.
      - My Reports to make the modified report accessible only to you.
    - 2. Enter a **Name** for the report, and optionally modify the **Description**.
    - 3. Click **OK**.
  - 3. In the **Report Saved** editor, click **Run newly saved report**, and answer the prompts to generate the report.
- 3. You can now modify the report:
  - From the Report Objects menu, click All Objects.
     In the All Objects hierarchy, drag the new attribute (for example Business Value Range 1000) into the report, releasing the left mouse button when over the appropriate location in the report.
  - 2. Drag the unwanted attribute (for example **Business Value Range 100**) out of the report grid.
- 4. Click **Report Home** > **Save**. Rerun the report to verify the results.

# Capture Point Dashboard

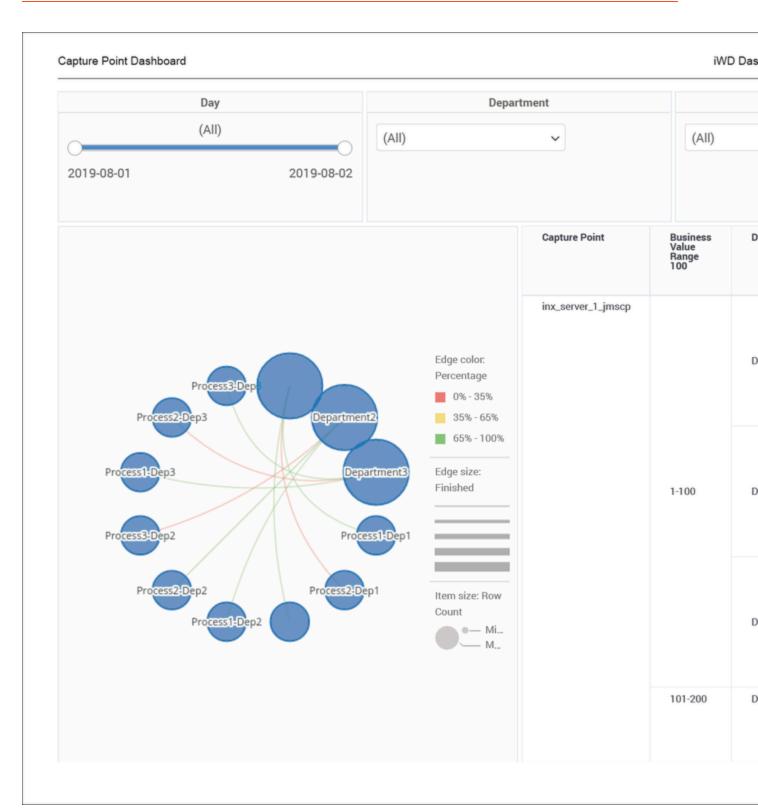


Work Arrival Business Value tab

The Capture Point Dashboard provides insights into the business value driven through capture points, and the volume of work processed through each capture point.

The dashboard report organizes data on the following tabs:

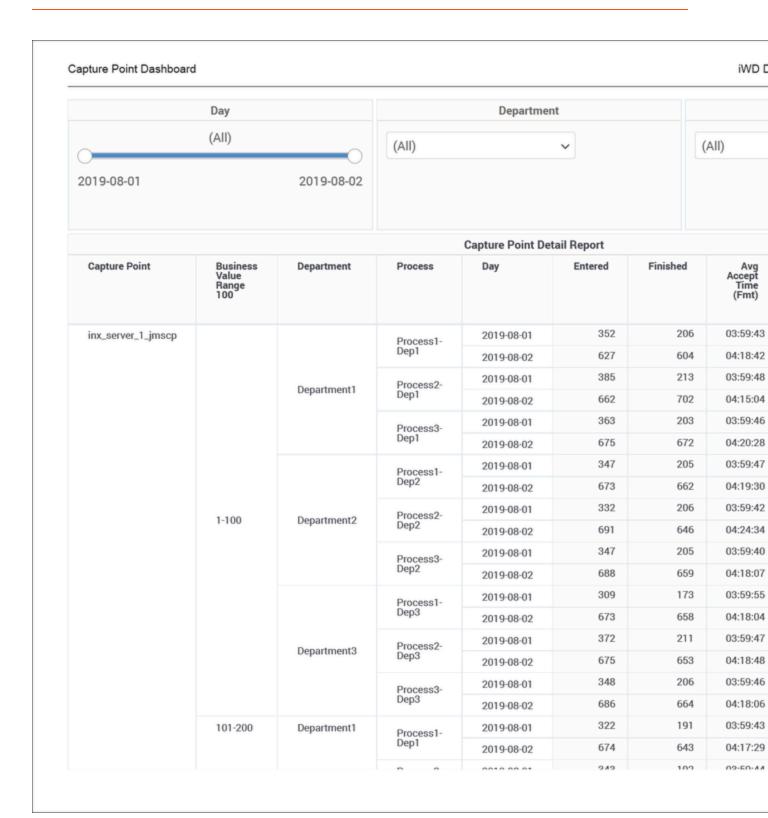
- **Work Arrival Business Value** tab This tab provides insights into the value of work arriving at each capture point.
- **Capture Point Volumes** tab This tab provides insights into the volume of work arriving at each capture point.
- Capture Point Detail tab This tab provides a drill down to the detail of the work that is arriving at the capture point.



Capture Point Volumes tab

The dashboard breaks down the overall average duration time that is spent to complete tasks (from inception within the pre-source system to termination within iWD) into average task durations at defined milestones along a task's routed path for each capture point. The dashboard also displays the business value range into which the tasks fall, the average time that it took to complete the tasks, and plots the total number of finished tasks against their assigned business value range.

Although this report is defined using the Business Value Range attribute, you can drill along this attribute to display larger ranges.



Capture Point Detail tab

Note that the term *dashboard* is used interchangeably with the term *dossier*. Dashboards provide an interactive, intuitive data visualization, summarizing key business indicators (KPIs). You can change how you view the data in most reports and dashboards by using interactive features such as selectors, grouping, widgets, and visualizations, and explore data using multiple paths, through text and data filtering, and layers of organization. For specific instructions about customizing the granularity of data in this dashboard, see Customizing the dashboard.

To get a better idea of what this dashboard looks like, view sample output from the report: Sample Capture Point Dashboard.pdf

The following table explains the prompts you can select when you generate the Capture Point Dashboard:

#### **Prompts on the Capture Point Dashboard**

Prompt	Description
Pre-set Date Filter	Choose from the convenient list of predefined rolling time ranges, spanning one day or more, over which to run the report.
Start Time	Choose the first day and time from which to gather report data.
End Time	Choose the last day and time from which to gather report data.
Department	Optionally, select a department on which to focus the report.
Process	Optionally, select a business process on which to focus the report.
Capture Point	Optionally, select a Capture Point on which to focus the report.
Tenant	Optionally, select a tenant on which to focus the report.
Media Type	Optionally, select one or more media types for which to gather data into the report.

The following table explains the attributes used in the Capture Point Dashboard:

#### **Attributes in the Capture Point Dashboard**

Attribute	Description	Data Mart Column
Capture Point	Enables data to be organized by the name of the capture point that acquired tasks from the source system.	CAPTURE_POINT.CAPTURE_POINT_NAME
Business Value Range	Enables data to be organized by the range in which the business value of the task capture falls. For more information, see Customizing the dashboard.  Ranges are character values that have a granularity of 5—for example: 1–5, 6–10, 11–15.	BUSINESS_VALUE.BUSINESS_VALUE_RAN

Department	Enables data to be organized by the name of the department for which iWD prioritizes and routes tasks.	DEPARTMENT.DEPARTMENT_NAME
Process	Enables data to be organized by the name of the business process. The business process name is a core attribute that is used to define strategies for how to route tasks and work items.	PROCESS_PROCESS_NAME
Tenant	Enables data within the reporting interval to be organized by tenant.	TENANT.TENANT_NAME
Day	Enables data within the reporting interval to be organized by a particular day within a month and year. Day values are presented in YYYY-MM-DD format.	DATE_TIME.LABEL_YYYY_MM_DD

The following table explains the metrics used in the Capture Point Dashboard:

#### **Metrics in the Capture Point Dashboard**

Metric	Description	Source or Calculation
Entered	The total number of new tasks that entered the iWD system through this capture point during the reporting interval.	IWD_AGG_TASK_CAPT_[Y,Q,M,W,D,
Finished	The total number of tasks that entered the iWD system through this capture point and were completed during the reporting interval.	IWD_AGG_TASK_CAPT_[Y,Q,M,W,D,
Avg Accept Time (Fmt)	For completed tasks, the average amount of time that elapsed before tasks that entered the iWD system through this capture point were assigned to a resource for the first time. This metric reflects how long, on average, tasks were backlogged.	Calculated based on the value of the Accept Time and Finished metrics, where:  • Accept Time is:  IWD_AGG_TASK_CAPT_[Y,Q,M,W]  • Finished is:  IWD_AGG_TASK_CAPT_[Y,Q,M,W]
Avg Handle Time (Fmt)	For tasks that entered the iWD system through this capture point, the average amount of time that resources worked on the tasks before completing them.	Calculated based on the value of the Handle Time and Finished metrics, where:  • Handle Time is: IWD_AGG_TASK_CAPT_[Y,Q,M,W] • Finished is: IWD_AGG_TASK_CAPT_[Y,Q,M,W]

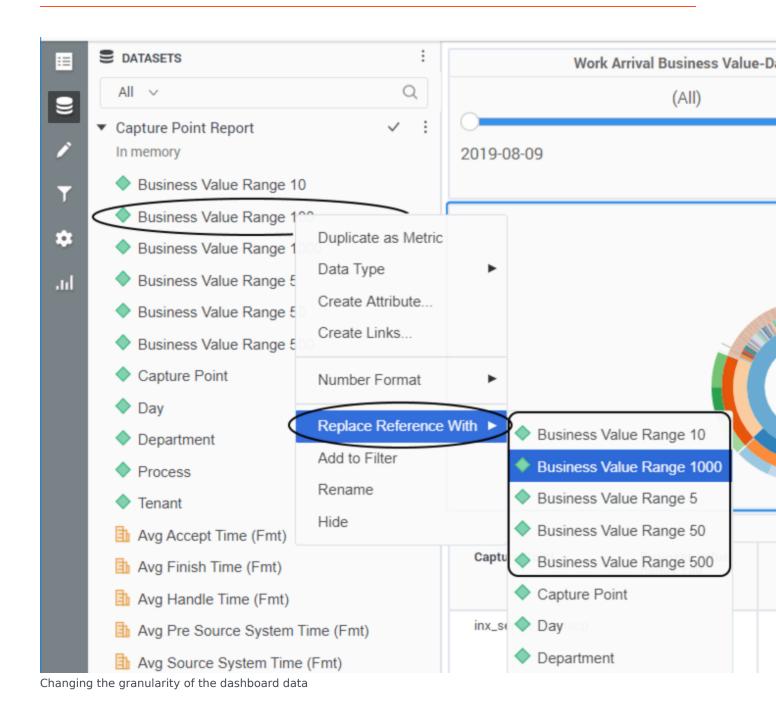
The average amount of time that Calculated based on the value of

Avg Finish Time (Fmt)

	elapsed before tasks that entered the iWD system through this capture point were completed. This measure includes the time that tasks were backlogged as well as work time.	the Finish Time and Finished metrics, where:  • Finish Time is:  IWD_AGG_TASK_CAPT_[Y,Q,M,W,D,H,15].CMP  • Finished is:  IWD_AGG_TASK_CAPT_[Y,Q,M,W,D,H,15].CMP
Avg Source System Time (Fmt)	For completed tasks that entered the iWD system through this capture point, the average amount of time the tasks spent in the preceding system before they were created within iWD.	Calculated based on the Source System Time and Finished metrics, where:  • Source System Time is: IWD_AGG_TASK_CAPT_[Y,Q,M,W,D,H,15].CMP  • Finished is: IWD_AGG_TASK_CAPT_[Y,Q,M,W,D,H,15].CMP
Avg Pre-Source System Time (Fmt)	For completed tasks that entered the iWD system through this capture point, the average amount of time the tasks spent in the pre-source system.	Calculated based on to the Pre Source System Time and Finished metrics, where:  • Pre Source System Time is: IWD_AGG_TASK_CAPT_[Y,Q,M,W,D,H,15].CMP  • Finished is: IWD_AGG_TASK_CAPT_[Y,Q,M,W,D,H,15].CMP

# Customizing the dashboard

Some dashboards contain attributes representing different granularity of an attribute, such as Age Range, or Business Value. You can change the granularity of the data shown on the dashboard by replacing this attribute with another; this procedure uses Business Value Range in the Capture Point Dashboard as an example (or see the video below).



# Procedure: Changing the granularity of the dashboard data

**Purpose:** Change the Business Value Range. By default, the Capture Point Dashboard is configured to use the "Business Value Range 100" attribute.

#### Steps

- 1. Log in with an account having Administrator privileges.
- 2. Open and run the dashboard.
- 3. Complete the following steps to make a copy of the dashboard, rather than modify the original:
  - 1. Click **File** > **Save As**.
  - 2. In the **Save As** editor:
    - 1. In the **Save in** list, choose one of the following paths:
      - **Shared Reports** > **Custom** to make the modified dashboard accessible to other users.
      - My Reports to make the modified dashboard accessible only to you.
    - Enter a Name for the report, and optionally modify the Description, or Advanced Options.
    - 3. Click **OK**.
  - 3. In the **Dossier Saved** editor, click **Run newly saved dossier**.
- 4. You can now modify the dashboard:
  - From the View menu, click Datasets Panel.
     The Datasets Panel appears, where you can select a new Business Value Range to apply.
  - 2. Right-click the existing attribute value (**Business Value Range 100** by default), and in the menu that appears, choose **Replace Reference With**.
  - Click the name of the dataset object to insert (for example Business Value Range 1000).
     The selected dataset attribute replaces the default Business Value Range 100
     attribute
- 5. Click **File** > **Save** to save your changes, and rerun the report to verify the results.

Video: Changing the granularity of the dashboard data

#### Link to video

This video describes how to customize the Business Value Range.

# Capture Point Task Duration Report

This page describes how you (as a business user or technical business user) can use the (**CX Insights for iWD** folder) > **Capture Point Task Duration Report** to identify and plan remediation for bottlenecks in the system. The technical business user can then tune routing strategies and associated business rules in order to reduce bottlenecks and routing milestones. This is particularly useful if you base distribution strategies or business operations around the point (the capture point) through which tasks enter the iWD system.

# Understanding the Capture Point Task Duration Report

				Capture	Point Tas	k Du	ration Rep	oort				
Tenant	Capture Point	Department	Process	Media Type	Day	New	Finished	Avg Handle Time (Fmt)	Avg Accept Time (Fmt)	Avg Finish Time (Fmt)	Avg Source System Time (Fmt)	Avg Pre Source System Time (Fmt)
					2020-07-31	16	0	00:00:00	00:00:00	00:00:00	00:00:00	00:00:
					2020-08-01	0	0	00:00:00	00:00:00	00:00:00	00:00:00	00:00:
			Advertising	workitem	2020-08-02	0	16	00:02:48	48:00:40	48:03:05	00:00:00	00:00:
					2020-08-03	0	16	00:02:48	48:00:40	72:00:17	00:00:00	00:00:
				Total		16	32	00:02:48	49:00:40	60:01:41	00:00:00	00:00:
					2020-07-31	17	17	00:02:30	07:00:16	07:02:46	00:00:00	00:00:
			Newsletter	workitem	2020-08-01	0	17	00:02:30	07:00:16	24:00:09	00:00:00	00:00:
		Email Marketing		Total		17	34	00:02:30	07:00:16	15:31:28	00:00:00	00:00:
				workitem	2020-07-31	15	30	00:02:06	04:00:19	07:01:22	00:00:00	00:00:
			Promotion	Total		15	30	00:02:06	04:00:19	07:01:22	00:00:00	00:00:
					2020-07-31	10	10	00:03:09	00:25:18	00:28:27	00:00:00	00:00:
			Retention	workitem	2020-08-01	0	10	00:03:09	00:25:18	12:00:22	00:00:00	00:00:
				Total		10	20	00:03:09	00:25:18	06:14:25	00:00:00	00:00:
			Total			58	116	00:02:36	16:24:22	24:00:07	00:00:00	00:00:
	inx_server_1_jmscp		Blogs / News Portals		2020-07-31	11	11	00:03:28	08:00:16	08:03:44	00:00:00	00:00:
elenium				workitem	2020-08-01	0	11	00:03:28	08:00:16	24:00:29	00:00:00	00:00:
				Total		11	22	00:03:28	08:00:16	16:02:06	00:00:00	00:00:
					2020-07-31	10	10	00:03:19	02:00:18	02:03:37	00:00:00	00:00:
			Forums	workitem	2020-08-01	0	10	00:03:19	02:00:18	12:00:27	00:00:00	00:00:
				Total		10	20	00:03:19	02:00:18	07:02:02	00:00:00	00:00:
					2020-07-31	10	0	00:00:00	00:00:00	00:00:00	00:00:00	00:00:
		Online Presence		workitem	2020-08-01	0	10	00:03:28	24:00:17	24:03:45	00:00:00	00:00:
			Online Advertisements		2020-08-02	0	10	00:03:28	24:00:17	48:00:21	00:00:00	00:00:
				Total		10	20	00:03:28	24:00:17	36:02:03	00:00:00	00:00:
					2020-07-31	11	11	00:03:02	04:00:18	04:03:20	00:00:00	00:00:
			Website	workitem	2020-08-01	0	11	00:03:02	04:00:18	16:00:23	00:00:00	00:00
				Total		11	22	00:03:02	04:00:18	10:01:52	00:00:00	00:00:
			Total			42	84	00:03:19	09:20:17	17:04:52	00:00:00	00:00:
		Total				100	200	00:02:54	13:26:15	21:05:42	00:00:00	00:00:
	Total					100	200	00:02:54	13:26:15	21:05:42	00:00:00	00:00:
سسماما						100				21:05:42	00:00:00	00:00:

This report breaks down the overall average duration time that is spent to complete tasks (from inception within the presource system to termination within iWD) into average task durations at defined milestones along a task's routed path for each capture point.

To get a better idea of what this report looks like, view sample output from the report: SampleCapturePointTaskDurationReport.pdf

The following tables explain the prompts you can select when you generate the report, and the metrics and attributes that are represented in the report:

# Prompts in the Capture Point Task Duration Report

Prompt	Description
Pre-set Date Filter	Choose from the convenient list of predefined rolling time ranges, spanning one day or more, over which to run the report.
Start Time	Choose the first day and time from which to gather report data.
End Time	Choose the last day and time from which to gather report data.
Department	Optionally, select a department on which to focus the report.
Process	Optionally, select a business process on which to focus the report.
Capture Point	Optionally, select a Capture Point on which to focus the report.
Tenant	Optionally, select a tenant on which to focus the report.
Media Type	Optionally, select one or more media types for which to gather data into the report.

# Attributes in the Capture Point Task Duration Report

Attribute	Description	Data Mart Table.Column
Tenant	Enables data within the reporting interval to be organized by tenant.	TENANT.TENANT_NAME
Department	Enables data to be organized by the name of the department for which iWD prioritizes and routes tasks.	DEPARTMENT.DEPARTMENT_NAME
Capture Point	Enables data to be organized by the name of the capture point that acquired tasks from the source system.	CAPTURE_POINT.CAPTURE_POINT_NA
Process	Enables data to be organized by the name of the business process, which is a core attribute of tasks and work items that define strategies for how to route them.	PROCESS_PROCESS_NAME

Attribute	Description	Data Mart Table.Column
Media Type	Enables data to be organized by media type.	MEDIA_TYPE.MEDIA_TYPE_NAME
Day	Enables data within the reporting interval to be organized by a particular day within a month and year. Day values are presented in YYYY-MM-DD format.	DATE_TIME.LABEL_YYYY_MM_DD

# Metrics in the Capture Point Task Duration Report

Metric	Description	Source or Calculation
New	Number of new tasks that were submitted to iWD during the given time interval. Tasks are counted only after they have been classified.	TASK_CAPT_FACT.NEW_TASK_COUNT
Finished	The total number of tasks that entered the iWD system through this capture point and were completed during the reporting interval.	IWD_AGG_TASK_CAPT_[Y,Q,M,W,D,H
Avg Handle Time (Fmt)	For tasks that entered the iWD system through this capture point, the average amount of time that resources worked on the tasks before completing them.	Calculated based on the value of the Handle Time and Finished metrics, where:  • Handle Time is:  IWD_AGG_TASK_CAPT_[Y,Q,M,W,I]  • Finished is:  IWD_AGG_TASK_CAPT_[Y,Q,M,W,I]
Avg Accept Time (Fmt)	For completed tasks that entered the iWD system through this capture point, the average amount of time that elapsed before the tasks were assigned to a resource for the first time. This metric reflects how long, on average, tasks were backlogged.	Calculated based on the value of the Accept Time and Finished metrics, where:  • Accept Time is:  IWD_AGG_TASK_CAPT_[Y,Q,M,W,I]  • Finished is:  IWD_AGG_TASK_CAPT_[Y,Q,M,W,I]
Avg Finish Time (Fmt)	For tasks that entered the iWD system through this capture point, the average amount of time that elapsed before the tasks were completed. This	Calculated based on the value of the Finish Time and Finished metrics, where:  • Finish Time is:  IWD_AGG_TASK_CAPT_[Y,Q,M,W,

measure includes the time that

work time.

tasks were backlogged as well as

IWD\_AGG\_TASK\_CAPT\_[Y,Q,M,W,D,H,15].CMF

• Finished is:

Metric	Description	Source or Calculation
Avg Source System Time (Fmt)	For completed tasks that entered the iWD system through this capture point, the average amount of time the tasks spent in the preceding system before they were created within iWD.	Calculated based on the Source System Time and Finished metrics, where:  • Source System Time is: IWD_AGG_TASK_CAPT_[Y,Q,M,W,  • Finished is: IWD_AGG_TASK_CAPT_[Y,Q,M,W,
Avg Pre-Source System Time (Fmt)	For completed tasks that entered the iWD system through this capture point, the average amount of time the tasks spent in the presource system.	Calculated based on to the Pre Source System Time and Finished metrics, where:  • Pre Source System Time is: IWD_AGG_TASK_CAPT_[Y,Q,M,W, • Finished is: IWD_AGG_TASK_CAPT_[Y,Q,M,W,

# Customer Segment Service Level Report

This page describes how you (as a team leader or business user) can use the (**CX Insights for iWD** folder) > **Customer Segment Service Level Report** to learn more about the number of new tasks, number of completed tasks and percentage of all tasks that were completed during the reporting interval, by day, by customer segment, and by business process.

# Understanding the Customer Segment Service Level Report

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Advertising  Advertising  Morkitem  Advertising  Morkitem  Advertising  Morkitem  Advertising  Morkitem  Advertising  Morkitem  Advertising  Morkitem  Central Processing Unit (CPU)  Central Processing Unit (CPU)  2020-08-02 0 2 2020-08-03 0 2 2020-08-03 1 0 2020-08-01 0 0 2020-08-02 0 1 2020-08-02 0 1 2020-08-03 0 1 2020-08-03 0 1 2020-08-03 0 1 2020-08-03 0 1 2020-08-03 0 1 2020-08-03 0 1 2020-08-03 0 1 2020-08-03 0 1 2020-08-03 0 1 2020-08-03 0 2 2020-08-03 0 2 2020-08-03 0 2 2020-08-03 0 2 2020-08-03 0 2 2020-08-03 0 2 2020-08-03 0 2 2020-08-03 0 2 2020-08-03 0 0 2 2020-08-03 0 0 2 2020-08-03 0 0 2 2020-08-03 0 0 0 2020-08-0							2020-08-03	0	3	0.00																															
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Advertising   Advertising   Advertising   Central Processing Unit (CPU)							2020-07-31	2	0	0.00																															
Advertising  Adver			Advertising workitem			Central Processing Unit (CPU)	2020-08-01	0	0	0.00																															
Random Access Memory (RAM)   2020-08-03   0   2				Advertising	workitem	workitem				2020-08-02	0	2	0.00																												
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New users Optical Drive (e.g., BD/DVD/CD drive)    New users   Optical Drive (e.g., BD/DVD/CD drive)   2020-08-01   0   0   0   0   0   0   0   0   0							2020-08-03	0	1	0.00																															
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2020-08-02 0 2 2020-08-03 0 2 2020-07-31 1 0 2020-08-01 0 0				Pandom Access Memory (DAM)	2020-08-01	0	0	0.00																																	
2020-07-31   1   0						kandom access memory (kam)	2020-08-02	0	2	0.00																															
Solid-State Drive (SSD)   2020-08-01   0   0					2020-08-03	0	2	0.00																																	
Solid-State Drive (SSD)					2020-07-31	1	0	0.00																																	
								Galda Ghaha Budua (GGD)	2020-08-01	0	0	0.00																													
2020-08-02 0 1						SOLIG-State Drive (SSD)	2020-08-02	0	1	0.00																															

This report provides the count and percentage of tasks that were completed during the reporting interval by customer segment and business process allowing you to compare achievements against objectives that you might have preset with a focus on different customer segments.

To get a better idea of what this report looks like, view sample output from the report: SampleCustomerSegmentServiceLevelReport.pdf

The following tables explain the prompts you can select when you generate the report, and the metrics and attributes that are represented in the report:

# Prompts in the Customer Segment Service Level Report

Prompt	Description
Pre-set Date Filter	Choose from the convenient list of predefined rolling time ranges, spanning one day or more, over which to run the report.
Start Date	Choose the first day and time from which to gather report data.
End Date	Choose the last day and time from which to gather report data.
Department	Optionally, select a department on which to focus the report.
Process	Optionally, select a business process on which to focus the report.
Customer Segment	Optionally, select a Customer Segment on which to focus the report.
Tenant	Optionally, select a tenant on which to focus the report.
Media Type	Optionally, select one or more media types for which to gather data into the report.

# Attributes in the Customer Segment Service Level Report

Attribute	Description	Data Mart Table.Column
Tenant	Enables data within the reporting interval to be organized by tenant.	TENANT.TENANT_NAME
Department	Enables data to be organized by the name of the department for which iWD prioritizes and routes tasks.	DEPARTMENT.DEPARTMENT_NAME
Process	Enables data to be organized by the name of the business process, which is a core attribute	PROCESS_PROCESS_NAME

Attribute	Description	Data Mart Table.Column
	of tasks and work items that define strategies for how to route them.	
Customer Segment	Enables data to be organized by the customer segment, which is an extended attribute of a task or work item that is assigned by the source system.	CUSTOMER_SEGMENT.CUSTOMER_
Product	Enables data to be organized by the type of product.	PRODUCT.PRODUCT_TYPE
Media Type	Enables data to be organized by media type.	MEDIA_TYPE.MEDIA_TYPE_NAME
Day	Enables data within the reporting interval to be organized by a particular day within a month and year. Day values are presented in YYYY-MM-DD format.	DATE_TIME.LABEL_YYYY_MM_DD

# Metrics in the Customer Segment Service Level Report

Metric	Description	Source or Calculation
New	Number of new tasks that were submitted to iWD during the given time interval. Tasks are counted only after they have been classified.	TASK_CLASSIF_FACT.NEW_TASK_COU
Finished	The total number of tasks of this classification that were completed during the reporting interval.	IWD_AGG_TASK_CLASSIF_[Y,Q,M,W,D
% Finished	The percentage of tasks of this classification that were completed during the reporting interval.	Calculated based on the Finished and Pending metrics, where:  • Finished is: IWD_AGG_TASK_CLASSIF_[Y,Q,M,V]  • Pending is: IWD_AGG_TASK_CLASSIF_[Y,Q,M,V]

# Customer Segment Service Level Dashboard

The Customer Segment Service Level Dashboard provides insights into the fulfillment of Service Level Agreements, by exploring the percentage of tasks that were completed during a specified interval. It illustrates the handling volumes by customer segment and business process, allowing you to compare achievements against your business objectives with a focus on each customer segment's progress over time.



Summary tab

The dashboard report organizes data on the following tabs:

- **Summary** tab This tab provides a high-level summary, presenting a summary for each product, for the entire reporting period, as a single line item, and provides representations of work completed broken out by Product, Department and Process, and Customer Segment. It provides a **Day** slider, which you can use to quickly focus on a given day or range of days.
- **Throughput Calendar** tab This tab breaks down performance for each product, by day, and provides a calendar widget that shows you the relative performance on each day in the reporting period, and allows you to easily focus on a day, or range of days.



Throughput Calendar tab

Note that the term *dashboard* is used interchangeably with the term *dossier*. Dashboards provide an interactive, intuitive data visualization, summarizing key business indicators (KPIs). You can change how you view the data in most reports and dashboards by using interactive features such as selectors, grouping, widgets, and visualizations, and explore data using multiple paths, through text and data filtering, and layers of organization.

To get a better idea of what this dashboard looks like, view sample output from the report: Sample Customer Segment Service Level Dashboard.pdf

The following table explains the prompts you can select when you generate the Customer Segment Service Level Dashboard:

**Prompts on the Customer Segment Service Level Dashboard** 

Prompt	Description
Pre-set Date Filter	Choose from the convenient list of predefined rolling time ranges, spanning one day or more, over which to run the report.
Start Date	Choose the first day from which to gather report data.
End Date	Choose the last day from which to gather report data.
Department	Optionally, select a department on which to focus the report.
Process	Optionally, select a business process on which to focus the report.
Customer Segment	Optionally, select a Customer Segment on which to focus the report.
Tenant	Optionally, select a tenant on which to focus the report.
Media Type	Optionally, select one or more media types for which to gather data into the report.

The following table explains the attributes used in the Customer Segment Service Level Dashboard:

#### **Attributes in the Customer Segment Service Level Dashboard**

Description	Data Mart Column
Enables data within the reporting interval to be organized by a particular day within a month and year. Day values are presented in YYYY-MM-DD format.	DATE_TIME.LABEL_YYYY_MM_DD
Enables data to be organized by the name of the department for which iWD prioritizes and routes tasks.	DEPARTMENT.DEPARTMENT_NAME
Enables data to be organized by the name of the business process, which is a core attribute of tasks and work items that define strategies for how to route them.	PROCESS.PROCESS_NAME
Enables data to be organized by the customer segment, which is an extended attribute of a task or work item that is assigned by the source system.	CUSTOMER_SEGMENT.CUSTOMER_S
Enables data to be organized by the type of product.	PRODUCT.PRODUCT_TYPE
Enables data within the reporting interval to be organized by tenant.	TENANT.TENANT_NAME
Enables data to be organized by the name of the department for which iWD prioritizes and routes tasks.	DEPARTMENT.DEPARTMENT_NAME
Enables data to be organized by the name of the business process, which is a core attribute of tasks and work items that define strategies for how to route them.	PROCESS.PROCESS_NAME
Enables data to be organized by the customer segment, which is an extended attribute of a task or work item that is assigned by the source system.	CUSTOMER_SEGMENT.CUSTOMER_S
Enables data to be organized by the type of product.	PRODUCT.PRODUCT_TYPE
Enables data within the reporting interval to be organized by a particular day within a month	DATE_TIME.LABEL_YYYY_MM_DD
	interval to be organized by a particular day within a month and year. Day values are presented in YYYY-MM-DD format.  Enables data to be organized by the name of the department for which iWD prioritizes and routes tasks.  Enables data to be organized by the name of the business process, which is a core attribute of tasks and work items that define strategies for how to route them.  Enables data to be organized by the customer segment, which is an extended attribute of a task or work item that is assigned by the source system.  Enables data to be organized by the type of product.  Enables data to be organized by the name of the department for which iWD prioritizes and routes tasks.  Enables data to be organized by the name of the business process, which is a core attribute of tasks and work items that define strategies for how to route them.  Enables data to be organized by the customer segment, which is an extended attribute of a task or work item that is assigned by the source system.  Enables data to be organized by the customer segment, which is an extended attribute of a task or work item that is assigned by the source system.  Enables data within the reporting interval to be organized by a

#### presented in YYYY-MM-DD format.

The following table explains the metrics used in the Customer Segment Service Level Dashboard:

## Metrics in the Customer Segment Service Level Dashboard

Metric	Description	Source or Calculation
% Finished	The percentage of tasks of this classification that were completed during the reporting interval.	Calculated based on the Finished and Pending metrics, where:  • Finished is:  IWD_AGG_TASK_CLASSIF_[Y,Q,M,V]  • Pending is:  IWD_AGG_TASK_CLASSIF_[Y,Q,M,V]
Finished / Finished Work	The total number of tasks of this classification that were completed during the reporting interval.	IWD_AGG_TASK_CLASSIF_[Y,Q,M,W,D
Delta	The change in the number of tasks during the time period. A positive value indicates that there are more tasks incomplete at the end of the interval than there were at the beginning, while a negative value indicates fewer incomplete tasks.	Calculated as the the difference between the value of the New metric, and the value of the Finished metric.
New / New Work	Number of new tasks that were submitted to iWD during the given time interval. Tasks are counted only after they have been classified.	TASK_CLASSIF_FACT.NEW_TASK_COU

# ETL Audit Dashboard

## **Important**

This dashboard is designed to be used by administrators, and by default is visible only to members of Administrator user groups

Use the (**CX Insights for iWD** folder >) **ETL Audit Dashboard** to efficiently audit/analyze iWD ETL processes. The dashboard provides an overview of job execution statistics, including duration, status, and other information drawn from the ETL AUDIT table.



Summary Intraday tab

The dashboard report organizes data on the following tabs:

- **Summary Intraday** tab Use this tab to analyze job execution statistics for intraday jobs, which are jobs that run on a regular interval (every 15 minutes by default, or at user-configurable intervals).
- **Summary Historical** tab Use this tab to analyze job execution statistics for historical jobs, which are jobs that run on a daily basis.



Summary Historical tab

Note that the term *dashboard* is used interchangeably with the term *dossier*. Dashboards provide an interactive, intuitive data visualization, summarizing key business indicators (KPIs). You can change how you view the data in most reports and dashboards by using interactive features such as selectors, grouping, widgets, and visualizations, and explore data using multiple paths, through text and data filtering, and layers of organization.

To get a better idea of what this dashboard looks like, view sample output from the report: SampleETLAuditDashboard.pdf

The following table explains the prompts you can select when you generate the ETL Audit Dashboard:

#### **Prompts on the ETL Audit Dashboard**

Prompt	Description
Start Time Min	Choose the low filter value for the Start Time attribute.
Start Time Max	Choose the high filter value for the Start Time attribute.
Data Source Type	Optionally, select a data source type on which to focus the report.
Process Name	Optionally, select a business process on which to focus the report.
Status	Optionally, select a status on which to focus the report.

The following table explains the attributes used in the ETL Audit Dashboard:

#### **Attributes in the ETL Audit Dashboard**

Attribute	Description	Data Mart Column	
ETL Audit Key	Enables data to be organized based on the technical key which identifies DataMart job.	ETL_AUDIT.ETL_AUDIT_KEY	
Data Source Type	Enables data to be organized based on the type of data source.	V_DIM_DATA_SOURCE_TYPE.DATA_S	SOURCE_TYPE
Data Source Name	Enables data to be organized	ETL_AUDIT.DATA_SOURCE_NAME	

	based on the name of the data source.	
Process Name	Enables data to be organized based on the process name.	V_DIM_PROCESS_NAME.PROCESS_NAME
Status	Enables data to be organized based on job status.	V_DIM_STATUS.STATUS
Job Type	Enables data to be organized based on the the type of job.	ETL_AUDIT.JOB_TYPE
Start Time	Enables data to be organized based on the time when the job started.	ETL_AUDIT.ETL_AUDIT_START_TIME
Finish Time	Enables data to be organized based on the time when the job finished.	ETL_AUDIT.ETL_AUDIT_FINISH_TIME
Batch ID	Enables data to be organized based on the batch number. Applicable only to jobs that process data in batches.	ETL_AUDIT.BATCH_ID
First Extracted Event ID	Enables data to be organized based on the ID that starts the range of event IDs that are processed.	ETL_AUDIT.FIRST_EXTRACTED_EVENT_ID
Last Extracted Event ID	Enables data to be organized based on the ID that ends the range of event IDs that are processed.	ETL_AUDIT.LAST_EXTRACTED_EVENT_ID
Batch Last Event ID	Enables data to be organized based on the ID of the last event in the batch.	ETL_AUDIT.BATCH_LAST_EVENT_ID
Last Interval Date Key	Enables data to be organized based on the last date interval that is processed by the aggregate ETL scripts.	ETL_AUDIT.LAST_INTERVAL_DATE_KEY
Last Interval Time Key	Enables data to be organized based on the last time interval that is processed by the aggregate ETL scripts.	ETL_AUDIT.LAST_INTERVAL_TIME_KEY

The following table explains the metrics used in the ETL Audit Dashboard:

#### **Metrics in the Customer ETL Audit Dashboard**

Metric	Description	Source or Calculation
Duration	The total amount number of seconds that job execution lasted. This value is calculated based on the creation timestamp for the job during the given time interval (ETL_AUDIT_START_TIME), and the finish time for the job	ETL_AUDIT.DURATION

	(ETL_AUDIT_FINISH_TIME).	
Extracted Events Amount	The number of loaded events during a job or batch run.	ETL_AUDIT.EXTRACTED_EVENTS_AMOUN

# Intraday Process Dashboard



Summary Tab



Trending Tab



Task Handling Tab



Finished Overdue Tab

This page describes how you can use the (**CX Insights for iWD** folder) > **Intraday Process Dashboard** to see an intraday overview of the completed iWD tasks that were overdue, along with the counts, percentages, and averages of completed iWD tasks, breaking down the average amount of time it took to complete tasks using three key metrics:

- Avg Finish Time measuring the average time it took for tasks to be completed after entering the system,
- Avg Accept Time measuring the average amount of time that tasks were backlogged before they
  reached a handling resource, and
- Avg Handle Time measuring the average amount of time that resources worked on tasks.

The dashboard also provides an overview of the task backlog for a day or reporting interval, providing summary information about how many tasks are pending, how many tasks are overdue, and how many of the completed tasks were overdue. Data is organized by day, tenant, department, and business process.

## Understanding the Intraday Process Dashboard

The dashboard is divided into four tabs:

- **Summary** tab Provides an intraday high-level summary of the backlog for the period chosen. This is intended to be the starting point for analysis, enabling you to quickly spot trends in KPI and potential bottlenecks in tasks. For example, it can enable you to quickly recognize that the backlog is growing or shrinking.
- **Trending** tab Provides at-a-glance information about trends occurring in the workload processing, and helps you to understand bottlenecks and intraday processing in more detail.
- **Task Handling** tab Enables you to examine how handle time may be affecting the processing of tasks, and helps you to quickly spot any exceptions.
- **Finished Overdue** tab Provides insights into tasks that were not serviced before their Service Level Agreement (SLA).

To get a better idea of what this dashboard looks like, view sample output from the dashboard: SampleiWDIntradayProcessDshbrd.pdf

The following tables explain the prompts you can select when you generate the dashboard, and the attributes and metrics that are represented in the dashboard:

## Prompts for the Intraday Process Dashboard

Prompt	Description
Pre-set Date Filter	From the list, choose a time period on which to report, and move it to the Selected list.
Start Date	Choose the first day from which to gather report data.
End Date	Choose the last day from which to gather report

Prompt	Description
	data.
Department	Optionally, select one or more departments to include in the report.
Process	Optionally, select one or more processes to include in the report.
Tenant	Optionally, select one or more tenants to include in the report.
Media Type	Optionally, select one or more media types for which to gather data into the report.

# Attributes used in the Intraday Process Dashboard

Attribute	Description	Data Mart Table.Column
Tenant	Enables data within the reporting interval to be organized by tenant.	TENANT.TENANT_NAME
Department	Enables data to be organized by the name of the department for which iWD prioritizes and routes tasks.	DEPARTMENT.DEPARTMENT_NAME
Process	Enables data to be organized by the name of the business process, which is a core attribute of tasks and work items that define strategies for how to route them.	PROCESS_PROCESS_NAME
Day	Enables data within the reporting interval to be organized by a particular day within a month and year. Day values are presented in YYYY-MM-DD format.	DATE_TIME.LABEL_YYYY_MM_DD

# Metrics used in the Intraday Process Dashboard

The Intraday Process Dashboard is divided into four tabs:

- Summary
- Trending
- Task Handling
- Finished Overdue

Metric	Description	Source or Calculation
Summary tab		
Pending Diff	The difference between the Entered and Finished metrics.	Calculated as the difference between the Entered and Finished metrics (Entered-Finished), where:  • Entered is: IWD_AGG_TASK_CLASSIF_[Y,Q,N] • Finished is: IWD_AGG_TASK_CLASSIF_[Y,Q,N]
Entered	The total number of new tasks of this classification that were submitted to iWD during the reporting interval.	IWD_AGG_TASK_CLASSIF_[Y,Q,M,W
Finished	The total number of tasks of this classification that were completed during the reporting interval.	IWD_AGG_TASK_CLASSIF_[Y,Q,M,W
Finished Overdue	The total number of completed tasks that were overdue during the reporting interval.	IWD_AGG_TASK_CLASSIF_[Y,Q,M,W
Pending	The current number of tasks that were pending (where the task status is Queued, Assigned, or Held) at the end of the reporting interval.	IWD_AGG_TASK_CLASSIF_[Y,Q,M,W
Pending Overdue	The current number of pending tasks that were overdue at the end of the reporting interval. A task is considered overdue when the SLA due date/time has been missed.	IWD_AGG_TASK_CLASSIF_[Y,Q,M,W
Trending tab		
Entered	The total number of new tasks of this classification that were submitted to iWD during the reporting interval.	IWD_AGG_TASK_CLASSIF_[Y,Q,M,W
Finished	The total number of tasks of this classification that were completed during the reporting interval.	IWD_AGG_TASK_CLASSIF_[Y,Q,M,W
Finished Overdue	The total number of completed tasks that were overdue during the reporting interval.	IWD_AGG_TASK_CLASSIF_[Y,Q,M,W
Pending	The current number of tasks that were pending (where the task status is Queued, Assigned, or Held) at the end of the reporting interval.	IWD_AGG_TASK_CLASSIF_[Y,Q,M,W

Metric	Description	Source or Calculation
Avg Handle Time	The average amount of time that agents worked on tasks before the tasks were completed.	Calculated based on the value of the Handle Time and Finished metrics, where:  • Handle Time is:  IWD_AGG_TASK_CLASSIF_[Y,Q,M,W,D,  • Finished is:  IWD_AGG_TASK_CLASSIF_[Y,Q,M,W,D,
Task Handling tab		
Avg Handle Time	The average amount of time that agents worked on tasks before the tasks were completed.	Calculated based on the value of the Handle Time and Finished metrics, where:  • Handle Time is: IWD_AGG_TASK_CLASSIF_[Y,Q,M,W,D, IWD_AGG_TASK_CLASSIF_[Y,Q,M,W,D, IWD_AGG_TASK_CLASSIF_[Y,Q,M,W,D, IWD_AGG_TASK_CLASSIF_[Y,Q,M,W,D, IWD_AGG_TASK_CLASSIF_[Y,Q,M,W,D, IWD_AGG_TASK_CLASSIF_IY,Q,M,W,D, IWD_AGG_TASK_CLASSIF_IY,Q,W,W,D, IW
Avg Accept Time	For completed tasks, the average amount of time that elapsed within the iWD system before tasks were assigned to a resource for the first time. This metric reflects how long, on average, tasks were backlogged.	Calculated based on the value of the Accept Time and Finished metrics, where:  • Accept Time is: IWD_AGG_TASK_CLASSIF_[Y,Q,M,W,D,  • Finished is: IWD_AGG_TASK_CLASSIF_[Y,Q,M,W,D,
Avg Finish Time	The average amount of time that elapsed before agents completed tasks. This metric includes the time that tasks were backlogged, as well as work time.	Calculated based on the value of the Finish Time and Finished metrics, where:  • Finish Time is:  IWD_AGG_TASK_CLASSIF_[Y,Q,M,W,D,  • Finished is:  IWD_AGG_TASK_CLASSIF_[Y,Q,M,W,D,
Finished Overdue tab		
Pending Overdue	The current number of pending tasks that were overdue at the end of the reporting interval. A task is considered overdue when the SLA due date/time has been missed.	IWD_AGG_TASK_CLASSIF_[Y,Q,M,W,D,H,15
Pending Overdue %	The percentage of pending tasks that were overdue at the end of the reporting interval.	Calculated based on the value of the Pending Overdue and Pending metrics, where:  • Pending is:

Metric	Description	Source or Calculation
		<ul><li>IWD_AGG_TASK_CLASSIF_[Y,Q,M,W,D,H,</li><li>Pending Overdue is: IWD_AGG_TASK_CLASSIF_[Y,Q,M,W,D,H,</li></ul>
Finished Overdue	The total number of completed tasks that were overdue during the reporting interval.	IWD_AGG_TASK_CLASSIF_[Y,Q,M,W,D,H,15]
Finished Overdue %	The percentage of completed tasks of this classification that were overdue during the reporting interval.	Calculated based on the Finished Overdue and Finished metrics, where:  • Finished Overdue is: IWD_AGG_TASK_CLASSIF_[Y,Q,M,W,D,H, • Finished is: IWD_AGG_TASK_CLASSIF_[Y,Q,M,W,D,H,
Avg Handle Time	The average amount of time that agents worked on tasks before the tasks were completed.	Calculated based on the value of the Handle Time and Finished metrics, where:  • Handle Time is: IWD_AGG_TASK_CLASSIF_[Y,Q,M,W,D,H, IWD_AGG_TASK_CLASSIF_[Y,Q,M,W,D,H, IWD_AGG_TASK_CLASSIF_[Y,Q,M,W,D,H, IWD_AGG_TASK_CLASSIF_[Y,Q,M,W,D,H, IWD_AGG_TASK_CLASSIF_[Y,Q,M,W,D,H, IWD_AGG_TASK_CLASSIF_[Y,Q,M,W,D,H, IWD_AGG_TASK_CLASSIF_IY,Q,M,W,D,H, IWD_AGG_TASK_CLASSIF_IY,Q,W,IW,Q,IY,Q,IY,Q,IY,Q,IY,Q,IY,Q,IY,

# Intraday Process Report

This page describes how you (as a manager, business user, workforce planning user, or team leader) can use the (**CX Insights for iWD** folder) > **Intraday Process Report** to view information about the performance of historical and pending work items, to learn more about sources of backlog, about throughput, and to understand how often tasks become overdue before they are finished.

# Understanding the Intraday Process Report

				In	itraday Pr	ocess R	eport							
Tenant	Department	Process	Media Type	Day	Entered	Finishe d	% Finishe d	Finishe d Overdue	% Finishe d Overdue	Pending	Pending Overdue	Avg Finish Time (Fmt)	Avg Handle Time (Fmt)	Avg Accept Time (Fmt)
				2020-07-31	16	0	0.00%	0	0.00%	16	0	00:00:00	00:00:00	00:00:0
				2020-08-01	0	0	0.00%	0	0.00%	16	0	00:00:00	00:00:00	00:00:0
		Advertising	workitem	2020-08-02	0	16	0.00%	0	0.00%	0	0	48:03:05	00:02:48	48:00:4
				2020-08-03	0	16	0.00%	0	0.00%	0	0	72:00:17	00:02:48	48:00:4
			Total		16	32	200.00%	0	0.00%	0	0	60:01:41	00:02:48	48:00:4
			workitem	2020-07-31	17	17	100.00%	0	0.00%	0	0	07:02:46	00:02:30	07:00:1
		Newsletter	WOLKICOM	2020-08-01	0	17	0.00%	17	100.00%	0	0	24:00:09	00:02:30	07:00:1
	Email Marketing		Total		17	34	200.00%	17	50.00%	0	0	15:31:28	00:02:30	07:00:1
			workitem	2020-07-31	15	30	200.00%	15	50.00%	0	0	07:01:22	00:02:06	04:00:1
		Promotion	Total		15	30	200.00%	15	50.00%	0	0	07:01:22	00:02:06	04:00:1
				2020-07-31	10	10	100.00%	0	0.00%	10	10	00:28:27	00:03:09	00:25:1
		Retention	workitem	2020-08-01	0	10	0.00%	10	100.00%	0	0	12:00:22	00:03:09	00:25:1
			Total		10	20	200.00%	10	50.00%	0	10	06:14:25	00:03:09	00:25:1
		Total			58	116	200.00%	42	36.21%	0	10	24:00:07	00:02:36	16:24:2
selenium				2020-07-31	11	11	100.00%	0	0.00%	0	0	08:03:44	00:03:28	08:00:1
		Blogs / News Portals	Workitem	2020-08-01	0	11	0.00%	11	100.00%	0	0	24:00:29	00:03:28	08:00:1
			Total		11	22	200.00%	11	50.00%	0	0	16:02:06	00:03:28	08:00:1
				2020-07-31	10	10	100.00%	0	0.00%	10	10	02:03:37	00:03:19	02:00:1
		Forums	workitem	2020-08-01	0	10	0.00%	10	100.00%	0	0	12:00:27	00:03:19	02:00:1
			Total		10	20	200.00%	10	50.00%	0	10	07:02:02	00:03:19	02:00:1
				2020-07-31	10	0	0.00%	0	0.00%	10	0	00:00:00	00:00:00	00:00:0
	Online Presence	Online	workitem	2020-08-01	0	10	0.00%	0	0.00%	0	0	24:03:45	00:03:28	24:00:1
		Advertisements		2020-08-02	0	10	0.00%	10	100.00%	0	0	48:00:21	00:03:28	24:00:1
			Total		10	20	200.00%	10	50.00%	0	0	36:02:03	00:03:28	24:00:1
				2020-07-31	11	11	100.00%	0	0.00%	0	0	04:03:20	00:03:02	04:00:1
		Website	workitem	2020-08-01	0	11	0.00%	11	100.00%	0	0	16:00:23	00:03:02	04:00:1
			Total		11	22	200.00%	11	50.00%	0	0	10:01:52	00:03:02	04:00:1
		Total			42	84	200.00%	42	50.00%	0	10	17:04:52	00:03:19	09:20:1
	Total				100	200	200.00%	84	42.00%	0	20	21:05:42	00:02:54	13:26:1
					100-						20	21.05.42	00:02:54	13.26.1

This report provides a count of the completed iWD tasks that were overdue and the counts, percentages, and averages of completed iWD tasks, and breaks down the average amount of time it took to complete tasks using three metrics:

- Avg Finish Time measuring the average time it took for tasks to be completed after entering the system,
- Avg Accept Time measuring average amount of time that tasks were backlogged before they reached a handling resource, and
- Avg Handle Time measuring the average amount of time that resources worked on tasks.

The report also provides a snapshot of the task backlog for a day or reporting interval, providing detailed information about how many tasks are currently pending, how many tasks are currently overdue, and how many of the completed tasks were overdue. Data is organized by day, tenant, department, and by business process.

To get a better idea of what this report looks like, view sample output from the report: SampleIntradayProcessReport.pdf

#### **Important**

If you plan to customize this report, be sure to first read the important information in Customizing attributes. Failure to do so can cause incorrect totals to appear in the report.

The following tables explain the prompts you can select when you generate the report, and the metrics and attributes that are represented in the report:

## Prompts in the Intraday Process Report

Prompt	Description
Pre-set Date Filter	Choose from the convenient list of predefined rolling time ranges, spanning one day or more, over which to run the report.
Start Date	Choose the first day and time from which to gather report data.
End Date	Choose the last day and time from which to gather report data.
Department	Optionally, select a department on which to focus the report.
Process	Optionally, select a business process on which to focus the report.
Tenant	Optionally, select a tenant on which to focus the report.
Media Type	Optionally, select one or more media types for which to gather data into the report.

# Attributes in the Intraday Process Report

Attribute	Description	Data Mart Table.Column
Tenant	Enables data within the reporting interval to be organized by tenant.	TENANT.TENANT_NAME

Attribute	Description	Data Mart Table.Column
Department	Enables data to be organized by the name of the department for which iWD prioritizes and routes tasks.	DEPARTMENT.DEPARTMENT_NAME
Process	Enables data to be organized by the name of the business process, which is a core attribute of tasks and work items that define strategies for how to route them.	PROCESS_PROCESS_NAME
Media Type	Enables data to be organized by media type.	MEDIA_TYPE.MEDIA_TYPE_NAME
Day	Enables data within the reporting interval to be organized by a particular day within a month and year. Day values are presented in YYYY-MM-DD format.	DATE_TIME.LABEL_YYYY_MM_DD

# Metrics in the Intraday Process Report

Metric	Description	Source or Calculation
Entered	The total number of new tasks of this classification that were submitted to iWD during the reporting interval.	IWD_AGG_TASK_CLASSIF_[Y,Q,M,W,
Finished	The total number of tasks of this classification that were completed during the reporting interval.	IWD_AGG_TASK_CLASSIF_[Y,Q,M,W,
% Finished	The percentage of tasks of this classification that were completed during the reporting interval.	Calculated based on the Finished and Pending metrics, where:  • Finished is:  IWD_AGG_TASK_CLASSIF_[Y,Q,N]  • Pending is:  IWD_AGG_TASK_CLASSIF_[Y,Q,N]
Finished Overdue	The total number of completed tasks of this classification that were overdue during the reporting interval.	IWD_AGG_TASK_CLASSIF_[Y,Q,M,W,
% Finished Overdue	The percentage of completed tasks of this classification that were overdue during the reporting interval.	Calculated based on the Finished Overdue and Finished metrics, where:  • Finished Overdue is: IWD_AGG_TASK_CLASSIF_[Y,Q,N]

**Source or Calculation** 

Metric

		<ul> <li>Finished is: IWD_AGG_TASK_CLASSIF_[Y,Q,M,W,D,H,15].C</li> </ul>
Pending	The current number of tasks that were pending (where the task status is Queued, Assigned, or Held) at the end of the reporting interval.	IWD_AGG_TASK_CLASSIF_[Y,Q,M,W,D,H,15].TOTA
Pending Overdue	The current number of pending tasks that were overdue at the end of the reporting interval. A task is considered overdue when the Service-Level Agreement (SLA) due date/time has been missed.	IWD_AGG_TASK_CLASSIF_[Y,Q,M,W,D,H,15].TOTA
Avg Finish Time (Fmt)	The average amount of time that elapsed before agents completed tasks of this classification. This metric includes the time that tasks were backlogged, as well as work time.	Calculated based on the value of the Finish Time and Finished metrics, where:  • Finish Time is: IWD_AGG_TASK_CLASSIF_[Y,Q,M,W,D,H,15].C  • Finished is: IWD_AGG_TASK_CLASSIF_[Y,Q,M,W,D,H,15].C
Avg Handle Time (Fmt)	The average amount of time that agents worked on tasks of this classification before the tasks were completed.	Calculated based on the value of the Handle Time and Finished metrics, where:  • Handle Time is: IWD_AGG_TASK_CLASSIF_[Y,Q,M,W,D,H,15].C  • Finished is: IWD_AGG_TASK_CLASSIF_[Y,Q,M,W,D,H,15].C
Avg Accept Time (Fmt)	For completed tasks, the average amount of time that elapsed within the iWD system before tasks of this classification were assigned to a resource for the first time. This metric reflects how long, on average, tasks were backlogged.	Calculated based on the value of the Accept Time and Finished metrics, where:  • Accept Time is: IWD_AGG_TASK_CLASSIF_[Y,Q,M,W,D,H,15].C  • Finished is: IWD_AGG_TASK_CLASSIF_[Y,Q,M,W,D,H,15].C

Description

### Customizing attributes



If you customize this report, you must ensure that the attributes listed in "REPORT OBJECTS" matches the attributes used in the report grid, as shown in the figure *Ensure that the attributes in the grid match those in the REPORT OBJECTS list*'.

#### This means that:

- To remove an attribute from the report, you must do so by clicking Remove from Report, (not Remove from Grid).
- To add a new attribute, you must add it both to the **REPORT OBJECTS** list, and to the report grid.

If you do not follow these steps, the totals for the Pending\Pending Overdue metrics may be displayed incorrectly.

# Queue Duration and Priority Dashboard

The Queue Duration and Priority Dashboard provides several visual breakdowns of the average time spent to complete tasks.

Each tab of the dashboard tracks tasks from inception within the presource system, through to completion within iWD, and provides insights into average task durations at defined milestones along a task's distribution path. It also allows you to analyse tasks based on ranges of queue priorities and, various processing milestones from which tasks were distributed or proceeded through prior to completion.



Summary tab

The dashboard report organizes data on the following tabs:

- **Summary** tab An overview of the time interactions spent in gueue.
- **Queue Priority** tab Insights you can use to tune the priorities in the rules system and routing strategies in order to reduce average durations at processing milestones. This report is particularly useful if you manage your operations around service level-based or business outcome-based priorities.
- **Queue Time** tab Insight into the movement of tasks through the iWD system, thereby troubleshooting business rules and routing strategies.
- Queue Depth tab Insights into pending volumes.



Queue Priority tab



Queue Time tab

Note that the term *dashboard* is used interchangeably with the term *dossier*. Dashboards provide an interactive, intuitive data visualization, summarizing key business indicators (KPIs). You can change how you view the data in most reports and dashboards by using interactive features such as selectors, grouping, widgets, and visualizations, and explore data using multiple paths, through text and data filtering, and layers of organization.



Queue Depth tab

To get a better idea of what this dashboard looks like, view sample output from the report: Sample Queue Duration and Priority Dashboard.pdf

The following table explains the prompts you can select when you generate the Queue Duration and Priority Dashboard:

#### **Prompts on the Queue Duration and Priority Dashboard**

Prompt	Description
Pre-set Date Filter	Choose from the convenient list of predefined rolling time ranges, spanning one day or more, over which to run the report.
Start Date	Choose the first day from which to gather report data.
End Date	Choose the last day from which to gather report data.
Department	Optionally, select a department on which to focus the report.
Process	Optionally, select a business process on which to focus the report.
Queue	Optionally, select a queue on which to focus the report.
Tenant	Optionally, select a tenant on which to focus the report.

The following table explains the attributes used in the Queue Duration and Priority Dashboard:

#### **Attributes in the Queue Duration and Priority Dashboard**

Attribute	Description	Data Mart Column
Day	Enables data within the reporting interval to be organized by a particular day within a month and year. Day values are presented in YYYY-MM-DD format.	DATE_TIME.LABEL_YYYY_MM_DD

Department	Enables data to be organized by the name of the department for which iWD prioritizes and routes tasks.	DEPARTMENT.DEPARTMENT_NAME
Process	Enables data to be organized by the name of the business process, which is a core attribute of tasks and work items that define strategies for how to route them.	PROCESS_PROCESS_NAME
Queue	Enables data to be organized by the name of the interaction queue, agent workbin, agent group workbin, place workbin, or place group workbin into which tasks or work items entered.	QUEUE.QUEUE_NAME
Tenant	Enables data within the reporting interval to be organized by tenant.	TENANT.TENANT_NAME

The following table explains the metrics used in the Queue Duration and Priority Dashboard:

#### **Metrics in the Queue Duration and Priority Dashboard**

Methes III t	the Queue Buration and I morney	Dagiinoai a
Metric	Description	Source or Calculation
Priority Range 100	Enables data to be organized by the range (granularity of 100) in which the task's priority falls. You can drill along this attribute to display larger ranges in which task priorities fall. Ranges are character values that have a granularity of 100, for example: "1-100", "101-200", and so on. For information about customization, see Customizing the dashboard.	PRIORITY.PRIORITY_RANGE
Avg Handle Time (Fmt)	The average amount of time that agents worked on tasks that were distributed from this queue before they were completed.	Calculated based on the value of the Handle Time and Finished metrics, where:  • Handle Time is: IWD_AGG_TASK_QUEUE_[Y,Q,M]  • Finished is: IWD_AGG_TASK_QUEUE_[Y,Q,M]
Avg Accept Time (Fmt)	For completed tasks that were distributed from this queue, the average amount of time that elapsed within the iWD system before the tasks were assigned to a resource for the first time. This metric reflects how long, on average, tasks were backlogged.	Calculated based on the value of the Accept Time and Finished metrics, where:  • Accept Time is:  IWD_AGG_TASK_QUEUE_[Y,Q,M]

		<ul> <li>Finished is: IWD_AGG_TASK_QUEUE_[Y,Q,M,W,D,H,15].CN</li> </ul>
Avg Finish Time (Fmt)	The average amount of time that elapsed before agents completed tasks that were distributed from this queue. This metric includes the time that tasks were backlogged, as well as work time.	Calculated based on the value of the Finish Time and Finished metrics, where:  • Finish Time is:  IWD_AGG_TASK_QUEUE_[Y,Q,M,W,D,H,15].CN  • Finished is:  IWD_AGG_TASK_QUEUE_[Y,Q,M,W,D,H,15].CN
Avg Source System Time (Fmt)	For completed tasks that were distributed from this queue, the average amount of time the tasks spent in the preceding system before they were created within iWD.	Calculated based on the Source System Time and Finished metrics, where:  • Source System Time is: IWD_AGG_TASK_CLASSIF_[Y,Q,M,W,D,H,15].C  • Finished is: IWD_AGG_TASK_QUEUE_[Y,Q,M,W,D,H,15].CN
Avg Pre-Source System Time (Fmt)	For completed tasks that were distributed from this queue, the average amount of time the tasks spent in the presource system.	Calculated based on to the Pre Source System Time and Finished metrics, where:  • Pre Source System Time is: IWD_AGG_TASK_QUEUE_[Y,Q,M,W,D,H,15].CN • Finished is: IWD_AGG_TASK_QUEUE_[Y,Q,M,W,D,H,15].CN
Entered	The total number of new tasks that were distributed from this queue and were submitted to iWD during the reporting interval.	IWD_AGG_TASK_QUEUE_[Y,Q,M,W,D,H,15].ENTER
Exited	The total number of tasks that exited the queue or workbin during the reporting interval.	IWD_AGG_TASK_QUEUE_[Y,Q,M,W,D,H,15].EXITE

# Queue Priority Range Report

This page describes how you (as a technical business user) can use the (**CX Insights for iWD** folder) > **Queue Priority Range Report** to tune the priorities in the rules system and routing strategies in order to reduce average durations at processing milestones. This report is particularly useful if you manage your operations around service level-based or business outcome-based priorities.

## Understanding the Queue Priority Range Report

			Queue Priority	Range Re	port				-
Tenant	Department	Process	Queue	Priority Range 100	Day	Entered	Exited	Avg Accept Time (Fmt)	Avg Finish Time (Fmt)
					2019-12-06	3,911	0	00:00:00	00:00:00
					2019-12-07	10,631	0	00:00:00	00:00:00
					2019-12-08	10,604	0	00:00:00	00:00:00
					2019-12-09	10,629	0	00:00:00	00:00:00
					2019-12-10	10,694	0	00:00:00	00:00:00
					2019-12-11	10,937	0	00:00:00	00:00:00
					2019-12-12	10,791	0	00:00:00	00:00:00
					2019-12-13	10,807	0	00:00:00	00:00:00
					2019-12-14	10,799	0	00:00:00	00:00:00
					2019-12-15	10,682	0	00:00:00	00:00:00
					2019-12-16	10,929	0	00:00:00	00:00:00
					2019-12-17	10,703	0	00:00:00	00:00:00
					2019-12-18	10,649	0	00:00:00	00:00:00
					2019-12-19	10,790	0	00:00:00	00:00:00
					2019-12-20	10,737	0	00:00:00	00:00:00
					2019-12-21	10,902	0	00:00:00	00:00:00
					2019-12-22	10,670	0	00:00:00	00:00:00
					2019-12-23	10,898	0	00:00:00	00:00:00
					2019-12-24	10,800	0	00:00:00	00:00:00
					2019-12-25	10,859	0	00:00:00	00:00:00
					2019-12-26	10,801	0	00:00:00	00:00:00
					2019-12-27	10,801	0	00:00:00	00:00:00
					2019-12-28	11,151	0	00:00:00	00:00:00
					2019-12-29	10,874	0	00:00:00	00:00:00
					2019-12-30	10,811	0	00:00:00	00:00:00
					2019-12-31	10,786	0	00:00:00	00:00:00
					2020-01-01	10,752	0	00:00:00	00:00:00
					2020-01-02	10,782	0	00:00:00	00:00:00
					2020-01-03	10,515	0	00:00:00	00:00:00
selenium	Email Marketing	Advertising	iwd_bp_comp.Main.iWD_Captured	1-100	2020-01-04	10,789	0	00:00:00	00:00:00
					2020-01-05	10,761	0	00:00:00	00:00:00
					2020-01-06	10,888	0	00:00:00	00:00:00
					2020-01-07	10,712	0	00:00:00	00:00:00
					2020-01-08	10,851	0	00:00:00	00:00:00
					2020-01-09	10,751	0	00:00:00	00:00:00
					2020-01-10	10,796	0	00:00:00	00:00:00
					2020-01-11	10,671	0	00:00:00	00:00:00
					2020-01-12	10,601	0	00:00:00	00:00:00
					2020-01-13	42,342	23	00:00:00	00:00:00
					2020-01-14	14,366	3,897	00:00:00	00:00:00
					2020-01-15	45,154	2,232	00:00:00	00:00:00
							2	00:00:00	00:00:00

This report breaks down the overall average that is spent to complete tasks (from inception within the presource system, to termination within iWD) into average task durations at defined milestones along a task's routed path for each range of queue priorities.

Although this report is defined using the Priority Range attribute, you can drill along this attribute to display larger ranges in which task priorities fall.

To get a better idea of what this report looks like, view sample output from the report: SampleQueuePriorityRangeReport.pdf

The following tables explain the prompts you can select when you generate the report, and the metrics and attributes that are represented in the report:

## Prompts in the Queue Priority Range Report

Prompt	Description
Pre-set Date Filter	Choose from the convenient list of predefined rolling time ranges, spanning one day or more, over which to run the report.
Start Date	Choose the first day and time from which to gather report data.
End Date	Choose the last day and time from which to gather report data.
Department	Optionally, select a department on which to focus the report.
Process	Optionally, select a business process on which to focus the report.
Queue	Optionally, select a queue on which to focus the report.
Tenant	Optionally, select a tenant on which to focus the report.

## Attributes in the Queue Priority Range Report

Attribute	Description	Data Mart Table.Column
Tenant	Enables data within the reporting interval to be organized by tenant.	TENANT.TENANT_NAME
Department	Enables data to be organized by the name of the department for which iWD prioritizes and routes tasks.	DEPARTMENT.DEPARTMENT_NAME
Process	Enables data to be organized by the name of the business process, which is a core attribute of tasks and work items that define strategies for how to route them.	PROCESS_PROCESS_NAME
Queue	Enables data to be organized by the name of the interaction queue, agent workbin, agent	QUEUE.QUEUE_NAME

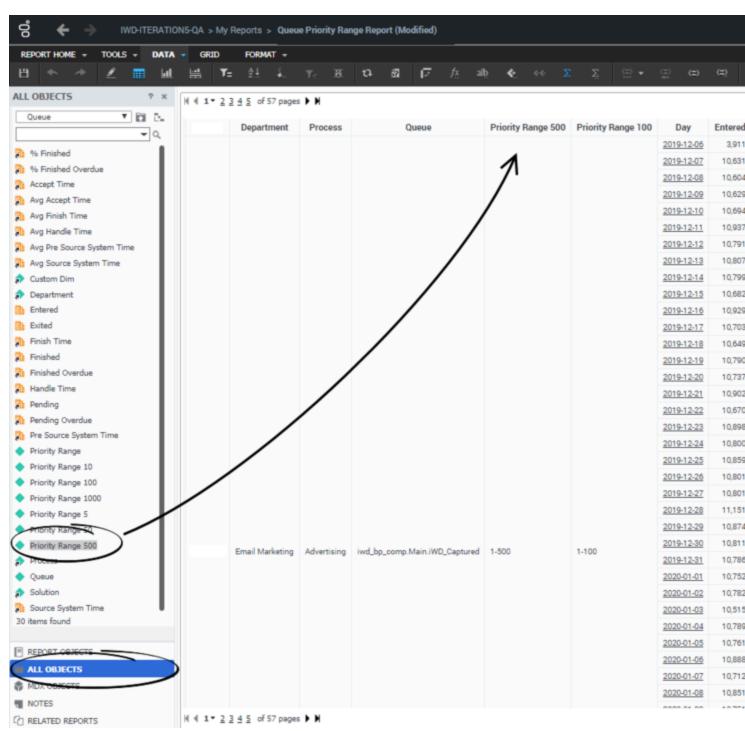
Attribute	Description	Data Mart Table.Column		
	group workbin, place workbin, or place group workbin into which tasks or work items entered.			
Priority Range 100	Enables data to be organized by the range in which the task's priority falls.  Ranges are character values that have a granularity of 100—for example: 1-100, 101-200, 201-300.	PRIORITY.PRIORITY_RANGE_100		
Day	Enables data within the reporting interval to be organized by a particular day within a month and year. Day values are presented in YYYY-MM-DD format.	DATE_TIME.LABEL_YYYY_MM_DD		

# Metrics in the Queue Priority Range Report

Metric	Description	Source or Calculation
Entered	The total number of new tasks that were distributed from this queue and were submitted to iWD during the reporting interval.	IWD_AGG_TASK_QUEUE_[Y,Q,M,W,D
Exited	The total number of tasks that exited the queue or workbin during the reporting interval.	IWD_AGG_TASK_QUEUE_[Y,Q,M,W,D
Avg Accept Time (Fmt)	For completed tasks, the average amount of time that elapsed within the iWD system before tasks that were distributed from this queue were assigned to a resource for the first time. This metric reflects how long, on average, tasks were backlogged.	Calculated based on the value of the Accept Time and Finished metrics, where:  • Accept Time is:     IWD_AGG_TASK_QUEUE_[Y,Q,M,V]  • Finished is:     IWD_AGG_TASK_QUEUE_[Y,Q,M,V]
Avg Finish Time (Fmt)	The average amount of time that elapsed before agents completed tasks that were distributed from this queue. This measure includes the time that tasks were backlogged, as well as work time.	Calculated based on the value of the Finish Time and Finished metrics, where:  • Finish Time is:  IWD_AGG_TASK_QUEUE_[Y,Q,M,V]  • Finished is:  IWD_AGG_TASK_QUEUE_[Y,Q,M,V]

## Customizing the report

Some dashboards contain attributes representing different granularity of an attribute, such as Priority Range, or Business Value. You can change the granularity of the data shown in the report by replacing this attribute with another; this procedure uses Business Value Range in the Capture Point Business Value Report as an example.



Changing the granularity of the report data

### Procedure: Changing the granularity of the report data

**Purpose:** Change the granularity range of an attribute. In this example, we change the Capture Point Business Value Report, which by default is configured to use the "Business Value Range 100" attribute.

#### Steps

- 1. Log in with an account having Administrator privileges.
- 2. Open and run the report. It's best to modify a copy of the report, rather than the original:
  - 1. Click **Report Home > Save As**.
  - 2. In the Save As editor:
    - 1. In the **Save in** list, choose one of the following paths:
      - **Shared Reports** > **Custom** to make the modified report accessible to other users.
      - My Reports to make the modified report accessible only to you.
    - 2. Enter a **Name** for the report, and optionally modify the **Description**.
    - 3. Click **OK**.
  - 3. In the **Report Saved** editor, click **Run newly saved report**, and answer the prompts to generate the report.
- 3. You can now modify the report:
  - From the Report Objects menu, click All Objects.
     In the All Objects hierarchy, drag the new attribute (for example Business Value Range 1000) into the report, releasing the left mouse button when over the appropriate location in the report.
  - 2. Drag the unwanted attribute (for example **Business Value Range 100**) out of the report grid.
- 4. Click **Report Home** > **Save**. Rerun the report to verify the results.

# Queue Throughput Report

Use the (**CX Insights for iWD** folder >) Queue Throughput Report to analyze how tasks pass through business process steps associated with queues in a given time interval, organized by processes within departments. The report provides a holistic view of tasks in queues (including New, Cancel, Rejected, and Completed).

### Understanding the Queue Throughput Report

				Queue T	hroughput Re	eport				
Tenant	Department	Process	Day	Tasks on New Queue	Tasks on Captured Queue	Tasks on Queued Queue	Tasks on Completed Queue	Tasks on Cancel Queue	Tasks on Rejected Queue	Tasks on Error Held Queue
			2020-03-06	1,190	0	0	0	0	0	0
			2020-03-07	0	0	0	0	0	0	0
		Advertising	2020-03-08	0	0	0	0	0	0	0
			2020-03-09	21	0	0	0	0	0	0
			2020-03-10	3,920	0	0	0	0	0	0
			2020-03-06	1,251	0	0	0	0	0	0
		Newsletter	2020-03-07	0	0	0	0	0	0	0
			2020-03-08	0	0	0	0	0	0	0
			2020-03-09	36	0	0	0	0	0	0
			2020-03-10	3,877	0	0	0	0	0	0
	Email Marketing	Promotion	2020-03-06	1,230	0	0	0	0	0	0
			2020-03-07	0	0	0	0	0	0	0
			2020-03-08	0	0	0	0	0	0	0
			2020-03-09	30	0	0	0	0	0	0
selenium			2020-03-10	4,017	0	0	0	0	0	0
			2020-03-06	1,247	0	0	0	0	0	0
			2020-03-07	0	0	0	0	0	0	0
		Retention 2020-03-08 2020-03-09	0	0	0	0	0	0	0	
			2020-03-09	32	0	0	0	0	0	0
			2020-03-10	4,008	0	0	0	0	0	0
				20.850					0	

To get a better idea of what this report looks like, view sample output from the report: SampleQueueThroughputReport .pdf

The following tables explain the prompts you can select when you generate the report, and the metrics and attributes that are represented in the report:

### Prompts in the Queue Throughput Report

Prompt	Description		
Pre-set Date Filter	Choose a Date Range from the list of preset		

Prompt	Description
	options. This prompt overrides the Start Date and End Date values.
Start Date	Choose the first day from which to collect report data.
End Date	Choose the last day from which to collect report data.
Department	Optionally, select one or more departments from which to gather data for the report.
Process	Optionally, select one or more processes from which to gather data for the report.
Tenant	Optionally, select one or more tenants for which to gather data into the report.

## Attributes in the Queue Throughput Report

Attribute	Description	Data Mart Table.Column
Tenant	Enables data within the reporting interval to be organized by tenant.	TENANT.TENANT_NAME
Department	Enables data to be organized by the department in which the interaction was handled.	DEPARTMENT.DEPARTMENT_NAME
Process	Enables data to be organized by the name of the business process, which is a core attribute of tasks and work items that define strategies for how to route them.	PROCESS_PROCESS_NAME
Time\Day	Enables data within the reporting interval to be organized by a particular day within a month and year. Day values are presented in YYYY-MM-DD format.	DATE_TIME.DATE_TIME_DAY_KEY, DATE_TIME.LABEL_YYYY_MM_DD, DATE_TIME.CAL_DATE

# Metrics in the Queue Throughput Report

### Tip

Not all of the metrics described here appear in the report, by default. However, you can easily modify the report to show different metrics, as described in Customizing Reports.

Metric	Description	Source or Calculation
Tasks on Submitted Queue	The number of tasks on Submitted Queue.	IWD_AGG_TASK_QUEUE.EXITED_TASK_COUNT
Tasks on New Queue	The number of tasks on New Queue.	IWD_AGG_TASK_QUEUE.EXITED_TASK_COUNT
Tasks on Captured Queue	The number of tasks on Captured Queue.	IWD_AGG_TASK_QUEUE.EXITED_TASK_COUNT
Tasks on Queued Queue	The number of tasks on Queued Queue.	IWD_AGG_TASK_QUEUE.EXITED_TASK_COUNT
Tasks on Completed Queue	The number of tasks on Completed Queue.	IWD_AGG_TASK_QUEUE.CMPL_TASK_COUNT
Tasks on Cancel Queue	The number of tasks on Cancel Queue.	IWD_AGG_TASK_QUEUE.EXITED_TASK_COUNT
Tasks on Rejected Queue	The number of tasks on Rejected Queue.	IWD_AGG_TASK_QUEUE.EXITED_TASK_COUNT
Tasks on Error Held Queue	The number of tasks on Error Held Queue.	IWD_AGG_TASK_QUEUE.EXITED_TASK_COUNT
Tasks on Hold Queue	The number of tasks on Hold Queue.	IWD_AGG_TASK_QUEUE.EXITED_TASK_COUNT
Tasks on Post Processing Queue	The number of tasks on Post Processing Queue.	IWD_AGG_TASK_QUEUE.EXITED_TASK_COUNT
Tasks on Non Routable Queue	The number of tasks on Non Routable Queue.	IWD_AGG_TASK_QUEUE.EXITED_TASK_COUNT
Tasks on Delivery Attempt Hold Queue	The number of tasks on Delivery Attempt Hold Queue.	IWD_AGG_TASK_QUEUE.EXITED_TASK_COUNT
Tasks on Force Route Hold Queue	The number of tasks on Force Route Hold Queue.	IWD_AGG_TASK_QUEUE.EXITED_TASK_COUNT
Tasks on Force Route Queued Queue	The number of tasks on Force Route Queued Queue.	IWD_AGG_TASK_QUEUE.EXITED_TASK_COUNT
Tasks on Delivery Window Hold Queue	The number of tasks on Delivery Window Hold Queue.	IWD_AGG_TASK_QUEUE.EXITED_TASK_COUNT
Tasks on Restricted Delivery Queue	The number of tasks on Restricted Delivery Queue.	IWD_AGG_TASK_QUEUE.EXITED_TASK_COUNT
Tasks on Transfer Queue	The number of tasks on Transfer Queue.	IWD_AGG_TASK_QUEUE.EXITED_TASK_COUNT

# Queue Task Duration Report

This page describes how you (as a business user, manager, team leader, or technical business analyst) can use the (**CX Insights for iWD** folder) > **Queue Task Duration Report** to gain insight into the movement of tasks through the iWD system, thereby troubleshooting business rules and routing strategies.

### Understanding the Queue Task Duration Report

Queue Task Duration Report									
Tenant	Department	Process	Queue	Day	Avg Handle Time	Avg Accept Time	Avg Finish Time	Avg Source System Time	Avg Pre Source System Tim
				2018-12-14	00:00:00	00:00:00	00:00:00	00:00:00	00:00:
				2018-12-17	00:00:00	00:00:00	00:00:00	00:00:00	00:00:
				2018-12-18	00:00:00	00:00:00	00:00:00	00:00:00	00:00:
				2018-12-19	00:00:00	00:00:00	00:00:00	00:00:00	00:00:
			iND Contured	2018-12-20	00:00:00	00:00:00	00:00:00	00:00:00	00:00:
			iWD_Captured	2018-12-21	00:00:00	00:00:00	00:00:00	00:00:00	00:00:
				2018-12-24	00:00:00	00:00:00	00:00:00	00:00:00	00:00:
				2018-12-26	00:00:00	00:00:00	00:00:00	00:00:00	00:00:
				2018-12-27	00:00:00	00:00:00	00:00:00	00:00:00	00:00:
				2018-12-28	00:00:00	00:00:00	00:00:00	00:00:00	00:00:
				2018-12-14	00:39:20	00:00:10	00:39:33	71:44:20	00:00:
				2018-12-17	00:26:34	00:22:31	00:49:08	144:09:07	00:00:
				2018-12-18	00:38:01	00:09:38	00:47:43	168:11:05	00:00:
				2018-12-19	00:17:17	00:21:01	00:38:22	192:22:18	00:00:
lenium	selenium_dep_	selenium_proc	imp completed	2018-12-20	00:37:32	00:00:12	00:37:46	05:33:30	00:00:
		_	iWD_Completed	2018-12-21	00:21:38	00:32:50	00:54:31	22:20:14	00:00:
				2018-12-24	00:30:26	00.21:40	00:52:08	00:25:29	00:00

This report provides average task durations for the specified processes and departments at various task processing milestones from the perspective of the queues or workbins from which tasks were distributed.

To get a better idea of what this report looks like, view sample output from the report: SampleQueueTaskDurationReport.pdf

The following tables explain the prompts you can select when you generate the report, and the metrics and attributes that are represented in the report:

# Prompts in the Queue Task Duration Report

Prompt	Description
Pre-set Date Filter	Choose from the convenient list of predefined rolling time ranges, spanning one day or more, over which to run the report.
Start Date	Choose the first day and time from which to gather report data.
End Date	Choose the last day and time from which to gather report data.
Department	Optionally, select a department on which to focus the report.
Process	Optionally, select a business process on which to focus the report.
Queue	Optionally, select a queue on which to focus the report.
Tenant	Optionally, select a tenant on which to focus the report.

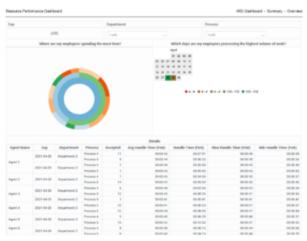
# Attributes in the Queue Task Duration Report

Attribute	Description	Data Mart Table.Column
Tenant	Enables data within the reporting interval to be organized by tenant.	TENANT.TENANT_NAME
Department	Enables data to be organized by the name of the department for which iWD prioritizes and routes tasks.	DEPARTMENT.DEPARTMENT_NAME
Process	Enables data to be organized by the name of the business process, which is a core attribute of tasks and work items that define strategies for how to route them.	PROCESS_PROCESS_NAME
Queue	Enables data to be organized by the name of the interaction queue, agent workbin, agent group workbin, place workbin, or place group workbin into which tasks or work items entered.	QUEUE.QUEUE_NAME
Day	Enables data within the reporting interval to be organized by a particular day within a month and year. Day values are presented in YYYY-MM-DD format.	DATE_TIME.LABEL_YYYY_MM_DD

# Metrics in the Queue Task Duration Report

Metric	Description	Source or Calculation
Avg Handle Time (Fmt)	The average amount of time that agents worked on tasks that were distributed from this queue before they were completed.	Calculated based on the value of the Handle Time and Finished metrics, where:  • Handle Time is: IWD_AGG_TASK_QUEUE_[Y,Q,M,W,D,H,15].C  • Finished is: IWD_AGG_TASK_QUEUE_[Y,Q,M,W,D,H,15].C
Avg Accept Time (Fmt)	For completed tasks that were distributed from this queue, the average amount of time that elapsed within the iWD system before the tasks were assigned to a resource for the first time. This metric reflects how long, on average, tasks were backlogged.	Calculated based on the value of the Accept Time and Finished metrics, where:  • Accept Time is: IWD_AGG_TASK_QUEUE_[Y,Q,M,W,D,H,15].CI  • Finished is: IWD_AGG_TASK_QUEUE_[Y,Q,M,W,D,H,15].CI
Avg Finish Time (Fmt)	The average amount of time that elapsed before agents completed tasks that were distributed from this queue. This metric includes the time that tasks were backlogged, as well as work time.	Calculated based on the value of the Finish Time and Finished metrics, where:  • Finish Time is: IWD_AGG_TASK_QUEUE_[Y,Q,M,W,D,H,15].CI • Finished is: IWD_AGG_TASK_QUEUE_[Y,Q,M,W,D,H,15].CI
Avg Source System Time (Fmt)	For completed tasks that were distributed from this queue, the average amount of time the tasks spent in the preceding system before they were created within iWD.	Calculated based on the Source System Time and Finished metrics, where:  • Source System Time is: IWD_AGG_TASK_CLASSIF_[Y,Q,M,W,D,H,15].Cl • Finished is: IWD_AGG_TASK_QUEUE_[Y,Q,M,W,D,H,15].Cl
Avg Pre-Source System Time (Fmt)	For completed tasks that were distributed from this queue, the average amount of time the tasks spent in the presource system.	Calculated based on to the Pre Source System Time and Finished metrics, where:  • Pre Source System Time is: IWD_AGG_TASK_QUEUE_[Y,Q,M,W,D,H,15].CI • Finished is: IWD_AGG_TASK_QUEUE_[Y,Q,M,W,D,H,15].CI

# Resource Performance Dashboard

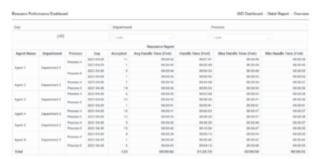


Summary tab

The Resource Performance Dashboard provides insights into the amount of time and effort resources are spending to resolve work items. Use this dashboard to quickly identify which days, departments, and processes are occupying resource time.

The dashboard organizes data on the following tabs:

- **Summary** tab This tab provides an at-a-glance view of handling resource activity as follows:
  - Where are my employees spending the most time?
  - Which days are my employees processing the highest volume of work?
- **Detail Report** tab This tab provides insights into the number of interactions, and a detailed breakdown of handle time for each handling resource.



Detail Report tab

Note that the term *dashboard* is used interchangeably with the term *dossier*. Dashboards provide an interactive, intuitive data visualization, summarizing key business indicators (KPIs). You can change how you view the data in most reports and dashboards by using interactive features such as selectors, grouping, widgets, and visualizations, and explore data using multiple paths, through text and data filtering, and layers of organization.

To get a better idea of what this dashboard looks like, view sample output from the dashboard: Sample Resource Performance Dashboard.pdf

The following table explains the prompts you can select when you generate the Resource Performance Dashboard:

#### **Prompts on the Resource Performance Dashboard**

Prompt	Description
Pre-set Date Filter	Choose a time range from the list, and move it to the Selected list.
Start Date	Choose the first day from which to gather report data.
End Date	Choose the last day from which to gather report data.
Department	Optionally, select one or more departments on which to report.
Process	Optionally, select one or more business processes on which to report.
Tenant	Optionally, select one or more tenants on which to report.
Agent Name	Optionally, select the name of the agent on which
(Modified in 9.0.017)	to focus the report.
Media Type	Optionally, select one or more media types for which to gather data into the report.

The following table explains the attributes used in the Resource Performance Dashboard:

#### **Attributes in the Resource Performance Dashboard**

Attribute	Description	Data Mart Column
Tenant	Enables data within the reporting interval to be organized by tenant.	TENANT.TENANT_NAME
Department	Enables data to be organized by the name of the department for which iWD prioritizes and routes tasks.	DEPARTMENT.DEPARTMENT_NAME
Process	Enables data to be organized by the name of the business process. The business process name is a core attribute that is used to define strategies for how to route tasks and work items.	PROCESS_PROCESS_NAME
Agent Name (Modified in 9.0.017)	Enables data to be organized by the name of the agent.	RESOURCE_GCXI.AGENT_NAME
Day	Enables data within the reporting interval to be organized by a	DATE_TIME.LABEL_YYYY_MM_DD

particular day within a month and year. Day values are presented in YYYY-MM-DD format.

The following table explains the metrics used in the Resource Performance Dashboard:

#### **Metrics in the Resource Performance Dashboard**

Metric	Description	Source or Calculation
Handle Time (Fmt)	The total amount of time, in seconds, that this resource worked on tasks before finishing them. This duration is measured as the difference between the time when the resource is assigned to a task, and the time when the task is finished.  Note that the act of a resource finishing a task within the iWD system does not, in and of itself, mark the task Completed—one of three states that indicate task finalization. A task can have multiple work items. This metric considers active as well as completed tasks in its computation.	IWD_AGG_TASK_AGENT_[Y,Q,M,W,D,H
Accepted	For completed tasks, the total number of tasks that were assigned to this resource during the reporting interval.	IWD_AGG_TASK_AGENT_[Y,Q,M,W,D,H
Avg Handle Time (Fmt)	The average amount of time that this resource (for example, an agent) worked on tasks before finishing them. Note that the act of a resource finishing a task within the iWD system does not, in and of itself, mark the task Completed—one of three states that indicate task finalization. This metric considers active as well as completed tasks in its computation.	Calculated based on the value of the Handle Time and Accepted metrics, where:  • Handle Time is: IWD_AGG_TASK_AGENT_[Y,Q,M,W, Accepted is: IWD_AGG_TASK_AGENT_[Y,Q,M,W, M,
Max Handle Time (Fmt)	The longest amount of time that this resource worked on a task before finishing it. Finishing a task within the iWD system does not necessarily imply that the task was Completed—one of three states that indicate task finalization. This measure considers active as well as completed tasks in its computation.	IWD_AGG_TASK_AGENT_[Y,Q,M,W,D,H
Min Handle Time (Fmt)	The shortest amount of time that this resource worked a task	IWD_AGG_TASK_AGENT_[Y,Q,M,W,D,F

before finishing it. Finishing a

task within the iWD system does not necessarily imply that the task was Completed—one of three states that indicate task finalization. This metric considers active as well as completed tasks in its computation.

# Resource Performance Report

This page describes how you (as a team leader, manager, or business user) can use the (**CX Insights for iWD** folder) > **Resource Performance Report** to understand how resources handle tasks, broken down by process, in a specified time interval. The report provides the total number of tasks that each resource accepted, as well as the shortest, longest, and average amount of time that it took to handle tasks.

### Understanding the Resource Performance Report

				Resour	ce Performance	Report										
Tenant	Department	Process	Media Type	Interaction Type	Interaction Subtype	Agent Name	Day	Accepted	Handle Time (Fmt)	Avg Handle Time (Fmt)						
					Agent 3	2021-04-28	1	00:00:48	00:00:4							
				Inbound	InboundNew	Total		1	00:00:48	00:00:4						
					Total			1	00:00:48	00:00:4						
					O	Agent 5	2021-04-28	1	00:00:40	00:00:						
			email		OutboundNew	Total		1	00:00:40	00:00:4						
Pro			Outbound	OutboundReply	Agent 4	2021-04-28	1	00:00:42	00:00:							
				Outboundkeply	Total		1	00:00:42	00:00:4							
	Process 2			Total			2	00:01:22	00:00:4							
	PIOCESS 2		Total				3	00:02:10	00:00:							
			workitem	Outbound	OutboundNew	Agent 3	2021-04-28	1	00:00:48	00:00:						
					odcboundivew	Total		1	00:00:48	00:00:						
	Department 1				OutboundReply	Agent 4	2021-04-28	1	00:00:40	00:00:						
	Deparement 1				ouchoundkeply	Total		1	00:00:40	00:00:						
					Total			2	00:01:28	00:00:						
				Total				2	00:01:28	00:00:						
			Total					5	00:03:38	00:00:4						
					InboundNew	Agent 2	2021-04-28	1	00:00:40	00:00:						
					TIDOMININEW	Total		1	00:00:40	00:00:						
			Inbound	Inbou	Inbound	Inbound	Inbound		Inbound	Inbound	InboundTest	Agent 6	2021-04-28	2	00:01:19	00:00:
	Process 3 email		11mound16st	Total		2	00:01:19	00:00:								
					Total			3	00:01:59	00:00:						
					OutboundACK	Agent 5	2021-04-28	2	00:01:25	00:00:						
			Outbou		Outbound	Odeboditanek	Total		2	00:01:25	00:00:4					

This report summarizes a resource's handling of tasks by process over a specified time interval. It provides the total number of tasks that the resource accepted, as well as the shortest, longest, and average amounts of time that it took the resource to handle them.

To get a better idea of what this report looks like, view sample output from the report:

#### SampleResourcePerformanceReport.pdf

The following tables explain the prompts you can select when you generate the report, and the metrics and attributes that are represented in the report:

## Prompts in the Resource Performance Report

Prompt	Description
Pre-set Date Filter	Choose from the convenient list of predefined rolling time ranges, spanning one day or more, over which to run the report.
Start Time	Choose the first day and time from which to gather report data.
End Time	Choose the last day and time from which to gather report data.
Department	Optionally, select a department on which to focus the report.
Process	Optionally, select a business process on which to focus the report.
Agent Name (Modified in 9.0.017)	Optionally, select the name of the agent on which to focus the report.
Tenant	Optionally, select a tenant on which to focus the report.
Media Type	Optionally, select one or more media types for which to gather data into the report.
Interaction Type	Optionally, select one or more interaction types for which to gather data into the report.

## Attributes in the Resource Performance Report

Attribute	Description	Data Mart Table.Column
Tenant	Enables data within the reporting interval to be organized by tenant.	TENANT.TENANT_NAME
Department	Enables data to be organized by the name of the department for which iWD prioritizes and routes tasks.	DEPARTMENT.DEPARTMENT_NAME
Process	Enables data to be organized by the name of the business process, which is a core attribute of tasks and work items that define strategies for how to route	PROCESS_PROCESS_NAME

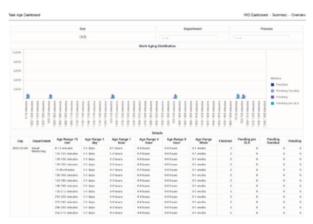
Attribute	Description	Data Mart Table.Column
	them.	
Media Type	Enables data to be organized by media type.	MEDIA_TYPE.MEDIA_TYPE_NAME
Interaction Type	Enables data to be organized by interaction type.	MEDIA_TYPE.INTERACTION_TYPE_NAM
Interaction Subtype	Enables data to be organized by interaction subtype.	MEDIA_TYPE.INTERACTION_SUBTYPE_N
Agent Name (Modified in 9.0.017)	Enables data to be organized by the name of the agent.	RESOURCE_GCXI.AGENT_NAME
Day	Enables data within the reporting interval to be organized by a particular day within a month and year. Day values are presented in YYYY-MM-DD format.	DATE_TIME.LABEL_YYYY_MM_DD

# Metrics in the Resource Performance Report

Metric	Description	Source or Calculation
Accepted	For completed tasks, the total number of tasks that were assigned to this resource during the reporting interval.	IWD_AGG_TASK_AGENT_[Y,Q,M,W,C
Finished	The total number of tasks that were completed during the reporting interval.	IWD_AGG_TASK_AGENT_[Y,Q,M,W,C
Handle Time (Fmt)	The total amount of time, in seconds, that this resource worked on tasks before finishing them. This duration is measured as the difference between the time when the resource is assigned to a task, and the time when the task is finished.  Note that the act of a resource finishing a task within the iWD system does not, in and of itself, mark the task Completed—one of three states that indicate task finalization. A task can have multiple work items. This metric considers active as well as completed tasks in its computation.	IWD_AGG_TASK_AGENT_[Y,Q,M,W,C
Avg Handle Time (Fmt)	The average amount of time that this resource (for example, an agent) worked on tasks before finishing them. Note that the act of a resource finishing a task within the iWD system does not,	Calculated based on the value of the Handle Time and Accepted metrics, where:  • Handle Time is:

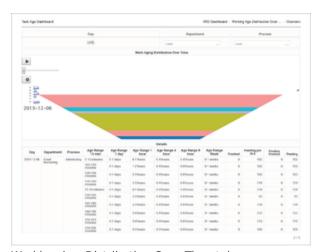
Metric	Description	Source or Calculation
	in and of itself, mark the task Completed—one of three states that indicate task finalization. This metric considers active as well as completed tasks in its computation.	<ul><li>IWD_AGG_TASK_AGENT_[Y,Q,M,</li><li>Accepted is: IWD_AGG_TASK_AGENT_[Y,Q,M,</li></ul>
Min Handle Time (Fmt)	The shortest amount of time that this resource worked a task before finishing it. Finishing a task within the iWD system does not necessarily imply that the task was Completed—one of three states that indicate task finalization. This metric considers active as well as completed tasks in its computation.	IWD_AGG_TASK_AGENT_[Y,Q,M,W,E
Max Handle Time (Fmt)	The longest amount of time that this resource worked on a task before finishing it. Finishing a task within the iWD system does not necessarily imply that the task was Completed—one of three states that indicate task finalization. This measure considers active as well as completed tasks in its computation.	IWD_AGG_TASK_AGENT_[Y,Q,M,W,E

# Task Age Dashboard



Summary tab

Use the (**CX Insights for iWD** folder) > **Task Age Dashboard** to better understand how well each department and process is meeting Service Level Agreements. The dashboard provides detailed information about the volume of tasks that are handled within the defined Service Level interval, and the volume that breach the Service Level Agreement for departments and processes.



Working Age Distribution Over Time tab

This dashboard provides an aging analysis of work, contrasting work that is performed prior to the Service Level being breached with the work that has breached the Service Level Agreement for your departments and processes. This enables you to visualize and analyze how each department and process is meeting their service levels. The dashboard organizes data on the following tabs:

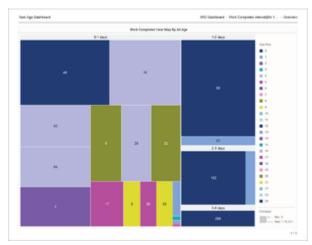
- Summary
- Working Age Distribution Over Time
- Work Completed Interval [15 min]

- Work Completed Interval [8 hr]
- Department And Process By Task Age



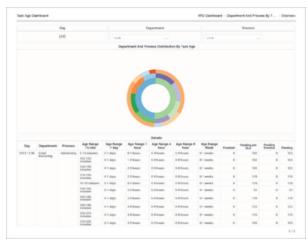
Work Completed Interval [15min] tab

Note that the term *dashboard* is used interchangeably with the term *dossier*. Dashboards provide an interactive, intuitive data visualization, summarizing key business indicators (KPIs). You can change how you view the data in most reports and dashboards by using interactive features such as selectors, grouping, widgets, and visualizations, and explore data using multiple paths, through text and data filtering, and layers of organization.



Work Completed Interval [8hr] tab

To get a better idea of what this dashboard looks like, view sample output from the report: Sample Task Age Dashboard.pdf



Department And Process By Task Age tab

The following table explains the prompts you can select when you generate the Task Age Dashboard:

#### **Prompts on the Task Age Dashboard**

Prompt	Description
Pre-set Date Filter	Choose from the convenient list of predefined rolling time ranges, spanning one day or more, over which to run the report.
Start Date	Choose the first day from which to gather report data.
End Date	Choose the last day from which to gather report data.
Department	Optionally, select a department on which to focus the report.
Process	Optionally, select a business process on which to focus the report.
Tenant	Optionally, select a tenant on which to focus the report.
Media Type	Optionally, select one or more media types for which to gather data into the report.

The following table explains the attributes used in the Task Age Dashboard:

#### **Attributes in the Task Age Dashboard**

Attribute	Description
Day	Enables data within the reporting interval to be organized by a particular day within a month and year. Day values are presented in YYYY-MM-DD format.
Department	Enables data to be organized by the name of the department for which iWD prioritizes and routes tasks.
Process	Enables data to be organized by the name of the

business process, which is a core attribute of tasks and work items that define strategies for how to route them.
Enables data within the reporting interval to be organized by the age of the task, where age has a granularity of 15-minutes ranges. For information about customization, see Customizing the dashboard.
Enables data within the reporting interval to be organized by the age of the task, where age has a granularity of 1 day ranges.
Enables data within the reporting interval to be organized by the age of the task, where age has a granularity of 1-hour ranges.
Enables data within the reporting interval to be organized by the age of the task, where age has a granularity of 4-hours ranges.
Enables data within the reporting interval to be organized by the age of the task, where age has a granularity of 8-hours ranges.
Enables data within the reporting interval to be organized by the age of the task, where age has a granularity of 1 week ranges.

The following table explains the metrics used in the Task Age Dashboard:

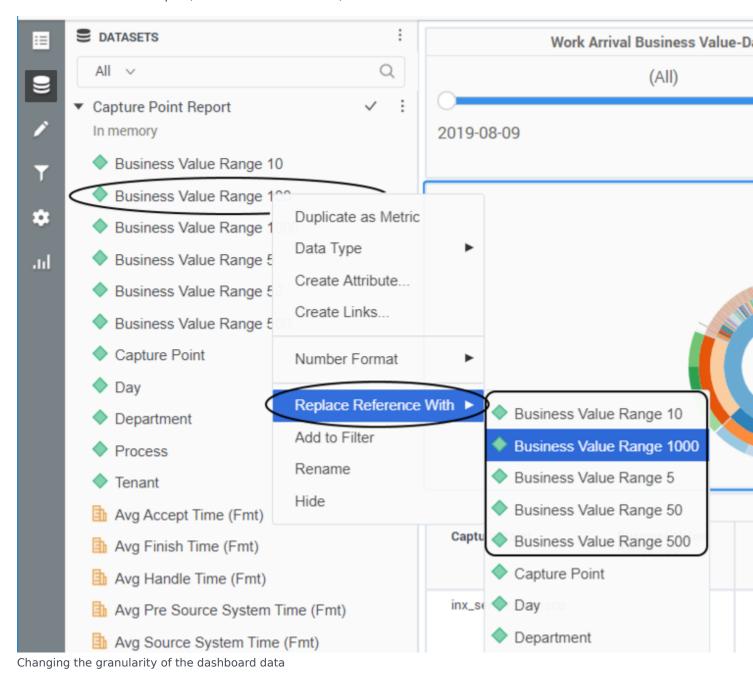
#### **Metrics in the Task Age Dashboard**

Metric	Description
Finished	The total number of tasks of this classification that were completed during the reporting interval.
Pending pre SLA	The number of pending tasks that are not overdue. Calculated as the difference between the total count of pending tasks, and the total count of overdue tasks.
Pending Overdue	The current number of pending tasks that were overdue at the end of the reporting interval. A task is considered overdue when the SLA due date/time has been missed.
Pending	The current number of tasks that were pending (where the task status is Queued, Assigned, or Held) at the end of the reporting interval.

To view more detailed information about the metrics and attributes in this report, and other metrics and attributes that can be used to customize reports, see the *Genesys CX Insights Projects Reference Guide*.

### Customizing the dashboard

Some dashboards contain attributes representing different granularity of an attribute, such as Age Range, or Business Value. You can change the granularity of the data shown on the dashboard by replacing this attribute with another; this procedure uses Business Value Range in the Capture Point Dashboard as an example (or see the video below).



### Procedure: Changing the granularity of the dashboard data

**Purpose:** Change the Business Value Range. By default, the Capture Point Dashboard is configured to use the "Business Value Range 100" attribute.

#### Steps

- 1. Log in with an account having Administrator privileges.
- 2. Open and run the dashboard.
- 3. Complete the following steps to make a copy of the dashboard, rather than modify the original:
  - 1. Click **File** > **Save As**.
  - 2. In the Save As editor:
    - 1. In the **Save in** list, choose one of the following paths:
      - Shared Reports > Custom to make the modified dashboard accessible to other users.
      - My Reports to make the modified dashboard accessible only to you.
    - Enter a Name for the report, and optionally modify the Description, or Advanced Options.
    - 3. Click OK.
  - 3. In the **Dossier Saved** editor, click **Run newly saved dossier**.
- 4. You can now modify the dashboard:
  - From the View menu, click Datasets Panel.
     The Datasets Panel appears, where you can select a new Business Value Range to apply.
  - 2. Right-click the existing attribute value (**Business Value Range 100** by default), and in the menu that appears, choose **Replace Reference With**.
  - Click the name of the dataset object to insert (for example Business Value Range 1000).
     The selected dataset attribute replaces the default Business Value Range 100
     attribute.
- 5. Click **File** > **Save** to save your changes, and rerun the report to verify the results.

### Video: Changing the granularity of the dashboard data

#### Link to video

This video describes how to customize the Business Value Range.

# Task Age Report

Use the (**CX Insights for iWD** folder) > **Task Age Report** to better understand how well each department and process is meeting Service Level Agreements. This report provides detailed information about the volume of tasks that are handled within the defined Service Level interval, and the volume that breach the Service Level Agreement for departments and processes.

### Understanding the Task Age Report

			Task Age	Report						
Tenant	Department	Process	Media Type	Age Range 1 day	Day	Pending	Pending Overdue	Finishe d		
				0.1 days	2020-07-31	768	0			
				0-1 days	2020-08-01	768	0			
				1-2 days	2020-08-01	768	0			
			workitem	1-2 days	2020-08-02	768	0			
		Advertising	workitem	2-3 days	2020-08-02	0	0	1		
				2-5 days	2020-08-03	16	0			
				3-4 days	2020-08-03	0	0	1		
				Total		1,552	0	3		
			Total			1,552	0	3		
				0-1 days	2020-07-31	476	119	1		
			workitem	0-1 days	2020-08-01	17	17			
	Email Marketing	Newsletter	WORKITEM	1-2 days	2020-08-01	0	0	1		
				Total		17	136	3		
			Total			17	136	3		
			1	0-1 days	2020-07-31	255	120	3		
		Promotion	workitem	Total		255	120	3		
		Total			255	120	3			
		Retention			2020-07-31	35	20	1		
			Retention		workitem	0-1 days	2020-08-01	0	0	1
					Retention		Total		0	20
			Total			0	20	2		
		Total				1,824	276	11		
selenium					2020-07-31	352	33	1		
	Blogs / News		0-1 days	2020-08-01	11	11				
		Blogs / News Portals	1-2 days	2020-08-01	0	0	1			
POTLAIS	1010415		Total		11	44	2			
	Total			11	44	2				
					2020-07-31	100	20	:		
				workitem	0-1 days	2020-08-01	0	0		
	Forums		Total		0	20	:			
			Total			. 0	20	:		

This report provides detailed information about the volume of tasks that are handled within the defined Service Level interval, and the volume that breach the Service Level Agreement for departments and processes.

To get a better idea of what this report looks like, view sample output from the report: SampleTaskAgeReport.pdf

### **Important**

If you plan to customize this report, be sure to first read the important information in Customizing attributes. Failure to do so can cause incorrect totals to appear in the report.

The following tables explain the prompts you can select when you generate the report, and the metrics and attributes that are represented in the report:

### Prompts in the Task Age Report

Prompt	Description
Pre-set Day Filter	Choose from the convenient list of predefined rolling time ranges, spanning one day or more, over which to run the report.
Start Date	Choose the first day from which to gather report data.
End Date	Choose the last day from which to gather report data.
Department	Optionally, select a department on which to focus the report.
Process	Optionally, select a business process on which to focus the report.
Media Type	Optionally, select one or more media types for which to gather data into the report.

## Attributes in the Task Age Report

Attribute	Description
Department	Enables data within the reporting interval to be organized by the name of the department for which iWD prioritizes and routes tasks.
Process	Enables data within the reporting interval to be organized by the name of the business process, which is a core attribute of tasks and work items

Attribute	Description
	that define strategies for how to route them.
Media Type	Enables data to be organized by media type.
Age Range 1 day	Enables data within the reporting interval to be organized by the age of the task, where age has a granularity of exactly 1 day ranges. The attribute contains non-overlapping ranges like 0-1 day, 1-2 day, 3-4 day, and so on. For information about customization, see Customizing the dashboard.
Day	Enables data within the reporting interval to be organized by a particular day within a month and year. Day values are presented in YYYY-MM-DD format.

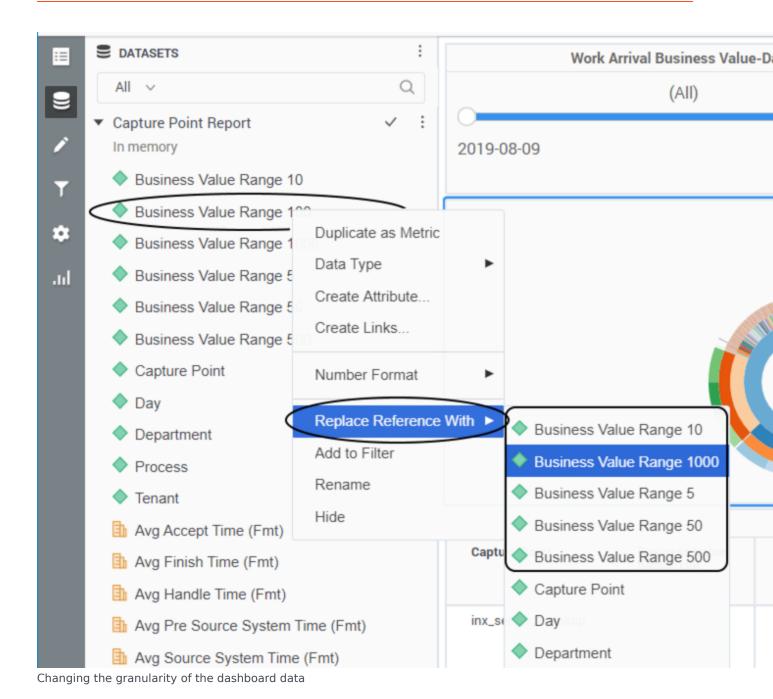
### Metrics in the Task Age Report

Metric	Description
Pending	The current number of tasks that were pending (where the task status is Queued, Assigned, or Held) at the end of the reporting interval.
Pending Overdue	The current number of pending tasks that were overdue at the end of the reporting interval. A task is considered overdue when the SLA due date/time has been missed.
Finished	The total number of tasks of this classification that were completed during the reporting interval.

To view more detailed information about the metrics and attributes in this report, and other metrics and attributes that can be used to customize reports, see the *Genesys CX Insights Projects Reference Guide*.

### Customizing the dashboard

Some dashboards contain attributes representing different granularity of an attribute, such as Age Range, or Business Value. You can change the granularity of the data shown on the dashboard by replacing this attribute with another; this procedure uses Business Value Range in the Capture Point Dashboard as an example (or see the video below).



### Procedure: Changing the granularity of the dashboard data

**Purpose:** Change the Business Value Range. By default, the Capture Point Dashboard is configured to use the "Business Value Range 100" attribute.

#### Steps

- 1. Log in with an account having Administrator privileges.
- 2. Open and run the dashboard.
- 3. Complete the following steps to make a copy of the dashboard, rather than modify the original:
  - 1. Click **File** > **Save As**.
  - 2. In the **Save As** editor:
    - 1. In the **Save in** list, choose one of the following paths:
      - **Shared Reports** > **Custom** to make the modified dashboard accessible to other users.
      - My Reports to make the modified dashboard accessible only to you.
    - 2. Enter a **Name** for the report, and optionally modify the **Description**, or **Advanced Options**.
    - 3. Click **OK**.
  - 3. In the **Dossier Saved** editor, click **Run newly saved dossier**.
- 4. You can now modify the dashboard:
  - From the View menu, click Datasets Panel.
     The Datasets Panel appears, where you can select a new Business Value Range to apply.
  - 2. Right-click the existing attribute value (**Business Value Range 100** by default), and in the menu that appears, choose **Replace Reference With**.
  - Click the name of the dataset object to insert (for example Business Value Range 1000).
     The selected dataset attribute replaces the default Business Value Range 100
     attribute
- 5. Click **File** > **Save** to save your changes, and rerun the report to verify the results.

Video: Changing the granularity of the dashboard data

### Link to video

This video describes how to customize the Business Value Range.

### Customizing attributes



If you customize this report, you must ensure that the attributes listed in "REPORT OBJECTS" matches the attributes used in the report grid, as shown in the figure *Ensure that the attributes in the grid match those in the REPORT OBJECTS list*'.

#### This means that:

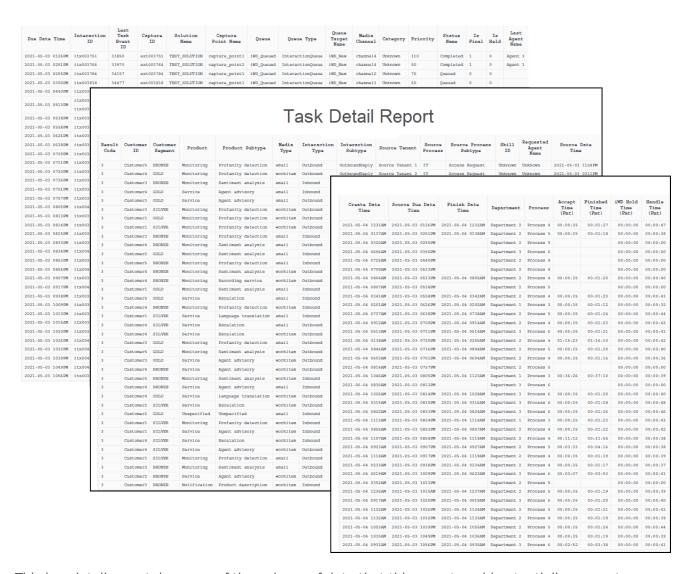
- To remove an attribute from the report, you must do so by clicking Remove from Report, (not Remove from Grid).
- To add a new attribute, you must add it both to the **REPORT OBJECTS** list, and to the report grid.

If you do not follow these steps, the totals for the Pending\Pending Overdue metrics may be displayed incorrectly.

# Task Detail Report

This page describes how you can use the (**CX Insights for iWD** folder) > **Task Detail Report** to understand the raw details of individual work items when viewed from the customer perspective. Many filters are provided to facilitate troubleshooting, identification, and validation of the results.

## Understanding the Task Detail Report



This is a detail report; because of the volume of data that this report could potentially generate,

Genesys recommends that you:

- Restrict the **Start Time** and **End Time** user prompts to the narrowest range that satisfies your report criteria. The default hour selections span one day.
- Refine other prompts to the minimum dataset that is required.

Some report columns round durations to the nearest minute, whereas time-bound metrics are provided to the nearest second.

To get a better idea of what this report looks like, view sample output from the report: SampleTaskDetailReport.pdf

The following tables explain the prompts you can select when you generate the report, and the metrics and attributes that are represented in the report:

### Prompts in the Task Detail Report

Prompt	Description
Pre-set Day Filter	Choose from the convenient list of predefined rolling time ranges, spanning one day or more, over which to run the report.
Start Time	Choose the first day and time from which to gather report data.
End Time	Choose the last day and time from which to gather report data.
Department	Optionally, select a department on which to focus the report.
Process	Optionally, select a business process on which to focus the report.
Media Channel	Optionally, select a media channel on which to focus the report.
Source Tenant	Optionally select a source tenant on which to focus the report.
Last Agent Name	Optionally, select the name of the agent who was last assigned the task or work item on which to
(Modified in 9.0.017)	focus the report
Customer ID	Optionally, select a customer ID on which to focus the report.
Capture ID	Optionally, select a capture ID on which to focus the report.
Interaction ID	Optionally, select a Interaction ID on which to focus the report.
Media Type	Optionally, select one or more media types for which to gather data into the report.
Interaction Type	Optionally, select one or more interaction types for

Prompt	Description
	which to gather data into the report.

## Attributes in the Task Detail Report

Attribute	Description	Data Mart Table.Column
Due Date & Time	Enables data to be organized by the date and time, in YYYY-M-D HHMM (AM/PM) format, on which tasks are due as defined by either the source system or iWD rules.	EVENT_DATE.EVENT_DATE_STR, EVENT_DATE.EVENT_TIME_12 by way of (TASK_FACT.DUE_DATE_KEY, TASK_FACT.DUE_TIME_KEY)
Interaction ID	Enables data to be organized by the task ID, which is a unique value within a single Interaction Server database.	TASK_FACT.INTERACTION_ID
Last Task Event ID	Enables data to be organized by the unique identifier for the last event that is associated with the task. Together with INTERACTION_ID, this field serves as the primary key of the H_TASK_FACT table.	TASK_FACT.LAST_TASK_EVENT_ID
Capture ID	Enables data to be organized by the ID of the task capture as issued by the originating source system.	TASK_FACT.CAPTURE_ID
Solution Name	Enables data to be organized by the descriptive name of the solution.	SOLUTION.SOLUTION_NAME by way of (TASK_FACT.SOLUTION_KEY)
Capture Point Name	Enables data to be organized by the descriptive name of the capture point.	CAPTURE_POINT.CAPTURE_POINT_NAM by way of (TASK_FACT.CAPTURE_POINT_KEY)
Queue	Enables data to be organized by the descriptive name of the Interaction queue or workbin.	QUEUE.QUEUE_TYPE by way of (TASK_FACT.CURRENT_QUEUE_KEY)
Queue Type	Enables data to be organized by the type of the distribution queue; one of the following values:  • InteractionQueue  • AgentWorkbin  • AgentGroupWorkbin  • PlaceGroupWorkbin	QUEUE.QUEUE_NAME by way of (TASK_FACT.CURRENT_QUEUE_KEY)

Attribute	Description	Data Mart Table.Column
Queue Target Name	Enables data to be organized by the workbin name of the agent, agent group, place, place group, or by the name of the interaction queue.	QUEUE.QUEUE_NAME by way of (TASK_FACT.CURRENT_QUEUE_TARGET
Media Channel	Enables data to be organized by the name of the media channel through which a task is received.	MEDIA_CHANNEL.MEDIA_CHANNEL_NAI by way of (TASK_FACT.MEDIA_CHANNEL_KEY)
Category	Enables data to be organized by the descriptive name of the category.	CATEGORY.CATEGORY_NAME by way of (TASK_FACT.CATEGORY_KEY)
Priority	Enables data to be organized by the Priority assigned to the task.	TASK_FACT.CURRENT_PRIORITY_KEY by way of (TASK_FACT.CURRENT_PRIORITY_KEY
Status Name	<ul> <li>Enables data to be organized by the name of the status of a task. One of the following values:</li> <li>new—Newly created task awaiting processing.</li> <li>rejected—Task was rejected during processing. This can occur when a task is assigned to an expired process or closed department.</li> <li>newheld—This value is retained only for compatibility with older releases. iWD 8.0+ does not generate this value.</li> <li>captured—Task has been classified by iWD, but not yet prioritized.</li> <li>queued—Task has been processed and prioritized at least once.</li> <li>distributed—Task has been distributed to an agent.</li> <li>canceled—Task has been canceled.</li> <li>completed—Task has been canceled.</li> <li>errorheld—Error occurred during task classification or prioritization. Error details are stored in the "error" custom extended task attribute. When iWD resumes, it attempts to process the task</li> </ul>	STATUS.STATUS_NAME by way of (TASK_FACT.CURRENT_STATUS_KEY)

Rejected.  1 indicates a task status of Completed, Canceled, or Rejected.  Enables data to be organized by whether a task was Held or Not Held:  1 indicates a task status other than NewHeld, ErrorHeld, or Held.  1 indicates a task status of NewHeld, ErrorHeld, or Held.  1 indicates a task status of NewHeld, ErrorHeld, or Held.  1 indicates a task status of NewHeld, ErrorHeld, or Held.  2 Indicates a task status of NewHeld, ErrorHeld, or Held.  3 Indicates a task status of NewHeld, ErrorHeld, or Held.  4 Indicates a task status of NewHeld, ErrorHeld, or Held.  5 Indicates a task status of NewHeld, ErrorHeld, or Held.  5 Indicates a task status of NewHeld, ErrorHeld, or Held.  6 Indicates a task status of NewHeld, ErrorHeld, or Held.  6 Indicates a task status of NewHeld, ErrorHeld, or Held.  7 Indicates a task status of NewHeld, ErrorHeld, or Held.  8 Indicates a task status of NewHeld, ErrorHeld, or Held.  8 Indicates a task status of NewHeld, ErrorHeld, or Held.  8 Indicates a task status other than NewHeld, ErrorHeld, or Held.  8 Indicates a task status other than NewHeld, ErrorHeld, or Held.  9 Indicates a task status other than NewHeld, ErrorHeld, or Held.  9 Indicates a task status other than NewHeld, ErrorHeld, or Held.  9 Indicates a task status other than NewHeld, ErrorHeld, or Held.  9 Indicates a task status other than NewHeld, ErrorHeld, or Held.  9 Indicates a task status other than NewHeld, ErrorHeld, or Held.  9 Indicates a task status other than NewHeld, ErrorHeld, or Held.  9 Indicates a task status other than NewHeld, ErrorHeld, or Held.  9 Indicates a task status other than NewHeld, ErrorHeld, or Held.  9 Indicates a task status other than NewHeld, ErrorHeld, or Held.  9 Indicates a task status other than NewHeld.  9	Attribute	Description	Data Mart Table.Column
whether the task is Final or Pending:  • 0 indicates a task status other than Completed, Canceled, or Rejected.  • 1 indicates a task status of Completed, Canceled, or Rejected.  Enables data to be organized by whether a task was Held or Not Held:  • 0 indicates a task status other than NewHeld, ErrorHeld, or Held.  • 1 indicates a task status of NewHeld, ErrorHeld, or Held.  • 1 indicates a task status of NewHeld, ErrorHeld, or Held.  Last Agent Name  Enables data to be organized by name of the agent who was last assigned the task or work item  Enables data to be organized by the descriptive name of the result code.  Enables data to be organized by the customer ID, which is an extended attribute of a task or work item down kitem that the source system assigns.  Customer Segment  Enables data to be organized by the descriptive name of the customer Segment.  Enables data to be organized by the customer Segment.  Enables data to be organized by pay of (TASK_FACT.CUSTOMER_SEGMENT_KEY)  Product  Enables data to be organized by PRODUCT.PRODUCT TYPE by way of (TASK_FACT.PRODUCT_TYPE		<ul> <li>held—Task is in a held state (either by user action or the system) and will not be reprioritized until the task is resumed.</li> <li>assigned—Task has been</li> </ul>	
whether a task was Held or Not Held:  • 0 indicates a task status other than NewHeld, ErrorHeld, or Held.  • 1 indicates a task status of NewHeld, ErrorHeld, or Held.  • 1 indicates a task status of NewHeld, ErrorHeld, or Held.  Last Agent Name  Enables data to be organized by name of the agent who was last assigned the task or work item  Enables data to be organized by the descriptive name of the result code.  Enables data to be organized by the customer ID, which is an extended attribute of a task or work item that the source system assigns.  Customer Segment  Enables data to be organized by the descriptive name of the customer Segment  Enables data to be organized by the descriptive name of the customer Segment  Enables data to be organized by the descriptive name of the customer segment  Enables data to be organized by the descriptive name of the customer segment  Enables data to be organized by the descriptive name of the customer segment  Enables data to be organized by the descriptive name of the customer segment  Enables data to be organized by the descriptive name of the customer segment  Enables data to be organized by the descriptive name of the customer Segment  Enables data to be organized by the descriptive name of the customer Segment  Enables data to be organized by the descriptive name of the customer Segment  Enables data to be organized by the descriptive name of the customer Segment  Enables data to be organized by the descriptive name of the customer Segment  Enables data to be organized by the descriptive name of the customer Segment  Enables data to be organized by the descriptive name of the customer Segment  Enables data to be organized by the descriptive name of the customer Segment  Enables data to be organized by the descriptive name of the customer Segment  Enables data to be organized by the descriptive name of the customer Segment  Enables data to be organized by the descriptive name of the customer Segment	Is Final	<ul> <li>whether the task is Final or Pending:</li> <li>0 indicates a task status other than Completed, Canceled, or Rejected.</li> <li>1 indicates a task status of Completed, Canceled, or</li> </ul>	STATUS.IS_FINAL
name of the agent who was last assigned the task or work item  Enables data to be organized by the descriptive name of the result code.  Enables data to be organized by the customer ID  Customer ID  Enables data to be organized by the customer ID, which is an extended attribute of a task or work item that the source system assigns.  Enables data to be organized by the descriptive name of the customer segment  Enables data to be organized by the descriptive name of the customer segment.  Enables data to be organized by the descriptive name of the customer segment.  Enables data to be organized by the descriptive name of the customer segment.  Enables data to be organized by the type of the product.  Enables data to be organized by the type of the product.  Enables data to be organized by the type of the product.  Enables data to be organized by the type of the product.  Enables data to be organized by the type of the product.  Enables data to be organized by PRODUCT_PRODUCT_SUBTYPE by	Is Held	<ul> <li>whether a task was Held or Not Held:</li> <li>0 indicates a task status other than NewHeld, ErrorHeld, or Held.</li> <li>1 indicates a task status of</li> </ul>	STATUS.IS_HELD
the descriptive name of the result code.  Enables data to be organized by the customer ID, which is an extended attribute of a task or work item that the source system assigns.  Customer Segment  Customer Segment  Enables data to be organized by the descriptive name of the customer segment.  Enables data to be organized by the descriptive name of the customer segment.  Enables data to be organized by the type of the product.  Enables data to be organized by the type of the product.  Enables data to be organized by the type of the product.  Enables data to be organized by the type of the product.  Enables data to be organized by the type of the product.  Enables data to be organized by the type of the product.  Enables data to be organized by PRODUCT.PRODUCT_SUBTYPE by	Last Agent Name (Modified in 9.0.017)	name of the agent who was last	by way of
the customer ID, which is an extended attribute of a task or work item that the source system assigns.  Enables data to be organized by the descriptive name of the customer segment.  Enables data to be organized by the descriptive name of the customer segment.  Enables data to be organized by the type of the product.  Enables data to be organized by the type of the product.  Enables data to be organized by the type of the product.  Enables data to be organized by product Subtype  Product Subtype  CUSTOMER.CUSTOMER_ID by way of (TASK_FACT.CUSTOMER_SEGMENT_KEY)  PRODUCT.PRODUCT_TYPE by way of (TASK_FACT.PRODUCT_KEY)  Enables data to be organized by PRODUCT.PRODUCT_SUBTYPE by	Result Code	the descriptive name of the	by way of
Customer Segment  the descriptive name of the customer segment.  Enables data to be organized by the type of the product.  Enables data to be organized by the type of the product.  Enables data to be organized by PRODUCT_PRODUCT_KEY)  Enables data to be organized by PRODUCT_PRODUCT_SUBTYPE by	Customer ID	the customer ID, which is an extended attribute of a task or work item that the source system	way of
the type of the product.  of (TASK_FACT.PRODUCT_KEY)  Enables data to be organized by PRODUCT_SUBTYPE by	Customer Segment	the descriptive name of the	
	Product		
	Product Subtype		

Attribute	Description	Data Mart Table.Column
		(TASK_FACT.PRODUCT_KEY)
Media Type	Enables data to be organized by media type.	MEDIA_TYPE.MEDIA_TYPE_NAME
Interaction Type	Enables data to be organized by interaction type.	MEDIA_TYPE.INTERACTION_TYPE_NAME
Interaction Subtype	Enables data to be organized by interaction subtype.	MEDIA_TYPE.INTERACTION_SUBTYPE_NAM
Source Tenant	Enables data to be organized by the name of the tenant from the source system.	SOURCE_TENANT.SOURCE_TENANT_NAME by way of (TASK_FACT.SOURCE_TENANT_KEY)
Source Process	Enables data to be organized by the name of the source-system process—for example, Order.	SOURCE_PROCESS.SOURCE_PROCESS_TYPE by way of (TASK_FACT.SOURCE_PROCESS_KEY)
Source Process Subtype	Subtype of the process—for example, Activation.	SOURCE_PROCESS.SOURCE_PROCESS_SUI
Skill ID	Enables data to be organized by the ID of the skill.	SKILL.SKILL_ID by way of (TASK_FACT.REQUESTED_SKILL_KEY)
Requested Agent Name (Modified in 9.0.017)	Enables data to be organized by the name of the agent as captured by the source system.	RESOURCE_GCXI.AGENT_NAME by way of (TASK_FACT.REQUESTED_AGENT_KEY)
Source Date Time	Enables data to be organized by the date and time, in YYYY-M-D HHMM (AM/PM) format, on which the second source system captured tasks in task-flow scenarios in which two systems are involved in the origination of tasks. (The second source system is the DTM [Driver Test Manager] that submitted the task to iWD.)	EVENT_DATE.EVENT_DATE_STR, EVENT_DATE.EVENT_TIME_12 by way of (TASK_FACT.SOURCE_CREATED_DATE_KEY, TASK_FACT.SOURCE_CREATED_TIME_KEY)
Create Date Time	Enables data to be organized by the date and time, in YYYY-M-D HHMM (AM/PM) format, on which tasks were created.	EVENT_DATE.EVENT_DATE_STR, EVENT_DATE.EVENT_TIME_12 by way of (TASK_FACT.CREATED_DATE_KEY, TASK_FACT.CREATED_TIME_KEY)
Source Due Date Time	Enables data to be organized by the date and time, in YYYY-M-D HHMM (AM/PM) format, at which the task is due in the source system.	EVENT_DATE.EVENT_DATE_STR, EVENT_DATE.EVENT_TIME_12 by way of (TASK_FACT.SOURCE_DUE_DATE_KEY,TASK
Finish Date Time	Enables data to be organized by the date and time, in YYYY-M-D HHMM (AM/PM) format, on which tasks or work items were completed.  EVENT_DATE_END is an alias for the EVENT_DATE iWD Data Mart table.	EVENT_DATE.EVENT_DATE_STR, EVENT_DATE.EVENT_TIME_12 by way of (TASK_FACT.COMPLETED_DATE_KEY, TASK_FACT.COMPLETED_TIME_KEY)

Attribute	Description	Data Mart Table.Column
Department	Enables data to be organized by the name of the department for which iWD prioritizes and routes tasks.	DEPARTMENT.DEPARTMENT_NAME by way of (PROCESS.DEPARTMENT_KEY on TASK_FACT.PROCESS_KEY=PROCES
Process	Enables data to be organized by the name of the business process, which is a core attribute of tasks and work items that define strategies for how to route them.	PROCESS.PROCESS_NAME by way of (TASK_FACT.PROCESS_KEY)

# Metrics in the Task Detail Report

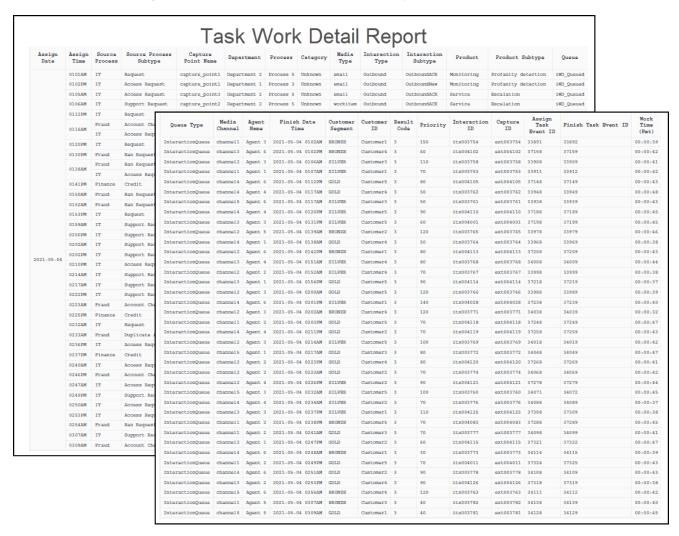
Metric	Description	Source (Table.Column) or Calculation
Accept Time (Fmt)	The amount of time that elapsed after this task was created in iWD before it was assigned to a resource.	TASK_FACT.ASSIGN_TIME_FROM_CREATED_SEC
Finished Time (Fmt)	The amount of time that it took to finish tasks, calculated as the difference from the moment that the task was created in the iWD system until the moment it was finished. The act of a resource finishing a task within the iWD system does not, in and of itself, mark the task Completed—one of three states that indicate task finalization. Different from other Finish Time measures, this measure considers active as well as completed tasks in its computation.	TASK_FACT.COMPLETE_TIME_FROM_CREATED_
iWD Hold Time (Fmt)	The amount of time that a task was held in iWD. This value represents an iWD hold action through the Web Service Capture API or through the iWD Manager user interface—not a hold event from a soft phone or desktop application.	TASK_FACT.TOTAL_HELD_TIME_SEC
Handle Time (Fmt)	The amount of work time, calculated as the difference from the moment that a resource (for example, an agent) is assigned to a task until the moment that the task is finished. The act of a resource finishing a task within the iWD system does not, in and	TASK_FACT.TOTAL_WORK_TIME_SEC

Metric	Description	Source (Table.Column) or Calculation
	of itself, mark the task Completed—one of three states that indicate task finalization. A task might have multiple work items. This measure considers active as well as completed tasks in its computation.	

# Task Work Detail Report

This page describes how you can use the (**CX Insights for iWD** folder) > **Task Work Detail Report** to learn more about tasks that involved more than one employee, the names of the queues that distributed the tasks to the employees, and more.

### Understanding the Task Work Detail Report



This is a detail report; because of the volume of data that this report could potentially generate, Genesys recommends that you:

• Restrict the Start Time and End Time user prompts to the narrowest range that satisfies your report

criteria. The default hour selections span one day.

• Refine other prompts to the minimum dataset that is required.

Some report columns round durations to the nearest minute, whereas time-bound metrics are provided to the nearest second.

To get a better idea of what this report looks like, view sample output from the report: SampleTaskWorkDetailReport.pdf

The following tables explain the prompts you can select when you generate the report, and the metrics and attributes that are represented in the report:

## Prompts in the Task Work Detail Report

Prompt	Description
Pre-set Day Filter	Choose from the convenient list of predefined rolling time ranges, spanning one day or more, over which to run the report.
Start Time	Choose the first day and time from which to gather report data.
End Time	Choose the last day and time from which to gather report data.
Department	Optionally, select a department on which to focus the report.
Process	Optionally, select a business process on which to focus the report.
Media Channel	Optionally, select a media channel on which to focus the report.
Source Tenant	Optionally, select a source tenant on which to focus the report.
Agent Name (Modified in 9.0.017)	Optionally, select the name of the agent on which to focus the report.
Customer ID	Optionally, select a customer ID on which to focus the report.
Capture ID	Optionally, select a capture ID on which to focus the report.
Interaction ID	Optionally, select an Interaction ID on which to focus the report.
Media Type	Optionally, select one or more media types for which to gather data into the report.
Interaction Type	Optionally, select one or more interaction types for which to gather data into the report.

## Attributes in the Task Work Detail Report

Attribute	Description	Data Mart Table.Column
Assign Date	Enables data to be organized by the date, in YYYY-MM-DD, on which a task was assigned to the agent.	TASK_WORK_FACT.ASSIGN_DATE_KEY
Day of Year	Enables data to be organized by the day of the year when the work started.	TASK_WORK_FACT.START_DATE_TIME_KE
Source Process	Enables data to be organized by the name of the source-system process—for example, Order.	SOURCE_PROCESS.SOURCE_PROCESS_T by way of (TASK_FACT.SOURCE_PROCESS_KEY)
Source Process Subtype	Subtype of the process—for example, Activation.	SOURCE_PROCESS.SOURCE_PROCESS_SU
Start Date Time	Enables data to be organized by the 15-minute interval during which this record was created.	TASK_WORK_FACT.START_DATE_TIME_KE
Assign Time	Enables data to be organized by the time of day at which the task was assigned to the agent.	TASK_WORK_FACT.ASSIGN_TIME_KEY
Department	Enables data to be organized by the name of the department for which iWD prioritizes and routes tasks.	DEPARTMENT.DEPARTMENT_NAME by way of (PROCESS.DEPARTMENT_KEY on TASK_FACT.PROCESS_KEY=PROCESS.PRO
Process	Enables data to be organized by the name of the business process. The business process name is a core attribute that is used to define strategies for how to route tasks and work items.	PROCESS.PROCESS_NAME by way of (TASK_FACT.PROCESS_KEY)
Category	Enables data to be organized by the descriptive name of the category.	CATEGORY.CATEGORY_NAME by way of (TASK_FACT.CATEGORY_KEY)
Product	Enables data to be organized by the type of the product.	PRODUCT.PRODUCT_TYPE by way of (TASK_FACT.PRODUCT_KEY)
Product Subtype	Enables data to be organized by the subtype of the product.	PRODUCT.PRODUCT_SUBTYPE by way of (TASK_FACT.PRODUCT_KEY)
Media Type	Enables data to be organized by media type.	MEDIA_TYPE.MEDIA_TYPE_NAME
nteraction Type	Enables data to be organized by interaction type.	MEDIA_TYPE.INTERACTION_TYPE_NAME
Interaction Subtype	Enables data to be organized by interaction subtype.	MEDIA_TYPE.INTERACTION_SUBTYPE_NAI
Queue	Enables data to be organized by the descriptive name of the interaction queue or workbin.	QUEUE.QUEUE_TYPE by way of (TASK_FACT.CURRENT_QUEUE_KEY)

Attribute	Description	Data Mart Table.Column
Queue Type	Enables data to be organized by the type of the distribution queue, which is one of the following values:  • InteractionQueue  • AgentWorkbin  • AgentGroupWorkbin  • PlaceGroupWorkbin	QUEUE.QUEUE_NAME by way of (TASK_FACT.CURRENT_QUEUE_KEY)
Queue Target Name	Enables data to be organized by the workbin name of the agent, agent group, place, place group, or by the name of the interaction queue.	QUEUE.QUEUE_NAME by way of (TASK_FACT.CURRENT_QUEUE_TARG
Media Channel	Enables data to be organized by the name of the media channel through which a task is received.	MEDIA_CHANNEL.MEDIA_CHANNEL_ by way of (TASK_FACT.MEDIA_CHANNEL_KEY)
Agent Name (Modified in 9.0.017)	Enables data to be organized by the name of the agent.	RESOURCE_GCXI.AGENT_NAME by way of (TASK_WORK_FACT.ASSIGNED_AGEN
Assign Date Time	Enables data to be organized by the date and time when the task was assigned to the agent.	TASK_WORK_FACT.ASSIGN_DATE_KE TASK_WORK_FACT.ASSIGN_DATE_KE
Finish Date Time	Enables data to be organized by the date and time when the task was finished by the agent.	TASK_WORK_FACT.FINISH_DATE_KEY TASK_WORK_FACT.FINISH_TIME_KEY
Customer Segment	Enables data to be organized by the descriptive name of the customer segment.	CUSTOMER_SEGMENT.CUSTOMER_S by way of (TASK_FACT.CUSTOMER_SEGMENT_K
Customer ID	Enables data to be organized by the customer ID, which is an extended attribute of a task or work item that the source system assigns.	CUSTOMER.CUSTOMER_ID by way of (TASK_FACT.CUSTOMER_KEY)
Result Code	Enables data to be organized by the descriptive name of the result code.	RESULT_CODE.RESULT_CODE_NAME by way of (TASK_FACT.LAST_RESULT_CODE_KEY)
Priority	Enables data to be organized by the priority assigned to the task.	TASK_FACT.CURRENT_PRIORITY_KEY by way of (TASK_FACT.CURRENT_PRIORITY_KEY
Interaction ID	Enables data to be organized by the task ID, which is a unique value within a single Interaction Server database.	TASK_FACT.INTERACTION_ID
Capture ID	Enables data to be organized by	TASK_FACT.CAPTURE_ID

Attribute	Description	Data Mart Table.Column
	the ID of the task capture as issued by the originating source system.	
Assign Task Event ID	Enables data to be organized by the ID, taken from the Interaction Server event log, that corresponds to the event at which the task was assigned to an agent.	TASK_WORK_FACT.ASSIGN_TASK_EVENT_ID
Finish Task Event ID	Enables data to be organized by the ID, taken from the Interaction Server event log, that corresponds to the event at which an agent finished working on the task.	TASK_WORK_FACT.FINISH_TASK_EVENT_ID
Solution Name	Enables data to be organized by the descriptive name of the solution.	SOLUTION.SOLUTION_NAME by way of (TASK_FACT.SOLUTION_KEY)
Is Abandon	Enables data to be organized by whether a task was abandoned: 0 indicates that the task was not abandoned (status finished). 1 indicates that the task was abandoned.	TASK_WORK_FACT.IS_ABANDON
Source Tenant	Enables data to be organized by the name of the tenant from the source system.	SOURCE_TENANT.SOURCE_TENANT_NAME by way of (TASK_FACT.SOURCE_TENANT_KEY)
Tenant	Enables data to be organized by the name of the tenant.	TENANT.TENANT_NAME
Process Custom Dim Attribute 1-5	These five attributes enable data to be organized by the type of custom dimension.	PROCESS.CUSTOM_DIM_KEY
Department Custom Dim Attribute 1-5	These five attributes enable data to be organized by the type of custom dimension.	DEPARTMENT.CUSTOM_DIM_KEY
Tenant Custom Dim Attribute 1-5	These five attributes enable data to be organized by the type of custom dimension.	TENANT.CUSTOM_DIM_KEY

## Metrics in the Task Work Detail Report

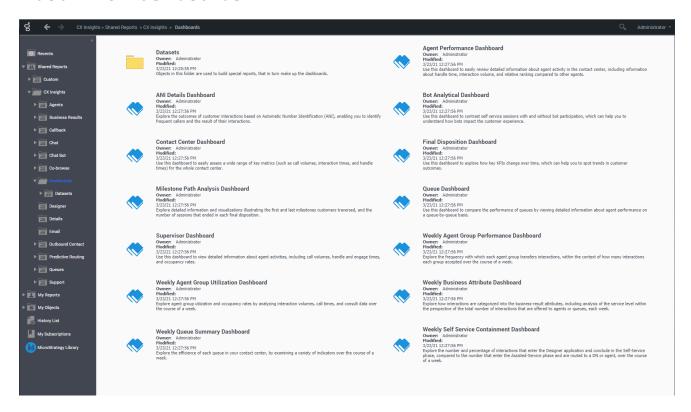
Metric	Description	Source (Table.Column) or Calculation
Work Time	The total amount of time that elapsed between the moment when the agent was assigned a task and the moment when the	TASK_WORK_FACT.WORK_TIME_SEC

Metric	Description	Source (Table.Column) or Calculation
	agent completed the task.	

## Dashboards

This page describes dashboards, which provide visual summaries of activity in your contact center, and are organized to suit your role in the organization. Dashboards (stored in the **Dashboards** folder) are ready-to-use, but as always, can be modified to suit your specific business needs.

### About the Dashboards



The following dashboards are available in the **CX Insights** > **Dashboards** folder:

- · ANI Details Dashboard
- Agent Performance Dashboard
- Bot Analytical Dashboard
- · Contact Center Dashboard
- · Final Disposition Dashboard
- · Milestone Path Analysis Dashboard
- Queue Dashboard

- Supervisor Dashboard
- Transfer Dashboard
- Weekly Agent Group Performance Dashboard
- Weekly Agent Group Utilization Dashboard
- · Weekly Business Attribute Dashboard
- Weekly Self Service Containment Dashboard
- Weekly Queue Summary Dashboard

#### Additional dashboards are found in other folders, for example:

- Asynchronous Chat Dashboard
- Bot Dashboard
- Predictive Routing AHT & Queue Dashboard
- Predictive Routing Agent Occupancy Dashboard
- Predictive Routing Model Efficiency Dashboard

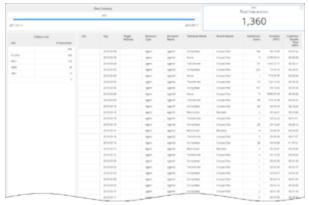
#### Link to video

#### **Related Topics:**

- Go back to the complete list of available reports.
- · Learn how to understand and use reports.
- · Learn how to create or customize reports.

## ANI Details Dashboard

The (**Dashboards** folder) > ANI Detail Dashboard provides detailed information about the outcomes of customer interactions, based on Automatic Number Identification (ANI), enabling you to identify frequent callers and the result of their interactions.



ANI Details Dashboard

The dashboard provides a detailed analysis of call volumes, durations, handle times, and outcomes. This view is divided into three sections:

- The Date Selector enables you to dynamically focus the dashboard on a period of time.
- Use the Callers List to optionally select an ANI value, which focuses the report on a single caller.
- The main area of the dashboard consists of a grid of detailed information pertaining to each call.

The ANI Details Report provides similar data to this dashboard, but the report enables you to explore outcomes on an hourly basis.

### Tip

Note that the term 'dashboard' is used interchangeably with the term 'dossier'. Dashboards / dossiers provide an interactive, intuitive data visualization, summarizing key business indicators (KPIs). You can change how you view the data by using interactive features such as selectors, grouping, widgets, and visualizations, and explore data using multiple paths, though text, data filtering, and layers of organization.

To get a better idea of what this dashboard looks like, view sample output from the report: Sample ANI Details Dashboard.pdf

#### Link to video

The following table explains the prompts you can select when you generate the ANI Details

#### Dashboard:

### **Prompts on the ANI Detail Dashboard**

Prompt	Description
Pre-set Date Filter	Choose a date from the list of preset options. If this prompt is set to anything other than none, the Date prompts are ignored. By default, the report captures data from the preceding 31 days.
Start Date	Choose the first day from which to include data in the report.
End Date	Choose the last day from which to include data in the report.

The following table explains the attributes used on the ANI Detail Dashboard:

#### **Attributes on the ANI Details Dashboard**

Attributes	Description
Callers List	This section provides a summary of the number of interactions for each caller. Click (or shift-click) in this list to focus the report on individual callers.
ANI	Enables data to be organized based on the ANI value associated with callers.
Day	Enables data to be organized based on the day on which a call was made. (YYYY-MM-DD)
Target Address	Enables data to be organized based on the DN or address to which the caller was connected.
Resource Type	Enables data to be organized based on the type of handling resource.
Resource Name	Enables data to be organized based on the user name of the handling resource.
Technical Result	Enables data to be organized based on disposition, for example, Abandoned, Completed, Diverted, Pulled, and Transferred.
Result Reason	Enables data to be organized by the reason for the technical result; for example, Abandoned-WhileRinging, AnsweredByAgent, or RouteOnNoAnswer.

The following table explains the metrics used on the ANI Detail Dashboard:

### **Metrics on the ANI Details Dashboard**

Metric	Description
Interaction Count	The number of interactions associated with a given source address.
Duration (FMT)	The amount of time that the state persisted (HH:MM:SS), calculated as the difference between the beginning and end of the agent's state.
Customer Handle Time (FMT)	The total time spent handling the interaction,

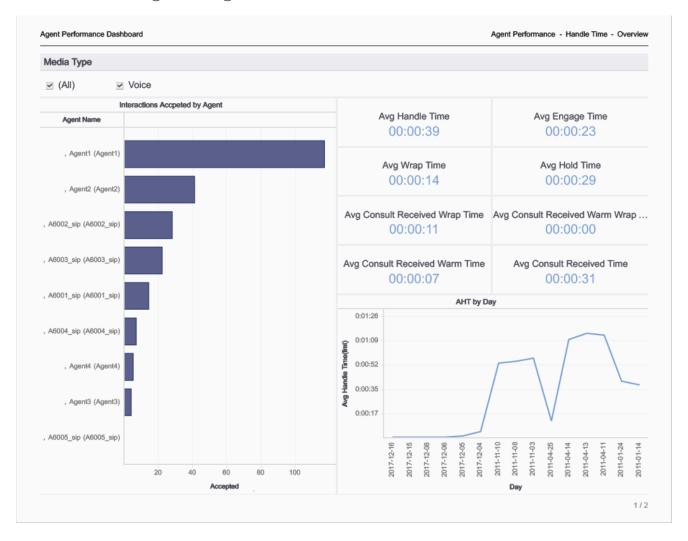
calculated as the sum of the Customer Engage Time, Customer Hold Time, and Customer Wrap Time metrics.

# Agent Performance Dashboard

This page describes how you can use the Agent Performance Dashboard to see detailed information about agent activity in the contact center, including information about handle time, interaction volume, and relative ranking compared to other agents.

Note that the term 'dashboard' is used interchangeably with the term 'dossier'. Dashboards / dossiers provide an interactive, intuitive data visualization, summarizing key business indicators (KPIs). You can change how you view the data in most reports and dashboards by using interactive features such as selectors, grouping, widgets, and visualizations, and explore data using multiple paths, through text and data filtering, and layers of organization.

### Understanding the Agent Performance Dashboard



Specially designed for contact center supervisors, this dashboard provides at-a-glance key information about agents, focusing on metrics related to handle time and agent conduct. The dashboard is divided into two tabs, both of which illustrate the percentage of interactions accepted by each agent:

- Handle Time Charts the average call handling statistics of each agent. In the Interactions Accepted
  by Agent section of the dashboard, click on the bar next to an agent's name to see detailed bar charts
  of that agent's average handle time, average engage time, and various other related metrics, as well
  as a line graph that illustrates the number of interactions offered to and accepted by that agent over
  time (by day). You can:
  - From the **Media Type** list, select a media type to narrow the focus of the dashboard.
  - In the **Interactions Accepted by Agent** bar graph, click on any agent to focus the dashboard on that agent.
- Conduct Charts the total volumes of calls handing by each agent, and illustrates how the agent handled interactions. In the Agents Rank by Interactions section of the dashboard, you can make a

selection in the drop-down list to filter the list of agents (to show, for example, agents with fewer than five interactions during the reporting period). Click on the bar next to an agent's name to see detailed bar charts of that agent's total interactions offered and accepted, and various other related metrics, as well as a line graph that illustrates the number of interactions offered to and accepted by that agent over time (by day). You can:

- From the **Media Type** list, select a media type to narrow the focus of the dashboard.
- In the **Agents Rank by Interactions** bar graph, click on any agent to focus the dashboard on that agent.

Use this dashboard to evaluate agent performance and conduct, both individually and in contrast to other agents.

To get a better idea of what this dashboard looks like, view sample output from the dashboard: HRCXIAgentPerformanceDashboard.pdf

The following tables explain the prompts you can select when you generate the dashboard, and the metrics that are represented in the dashboard:

### Prompts for the Agent Performance Dashboard

Prompt	Description
Pre-set Date Filter	From the list, choose a time period on which to report, and move it to the Selected list.
Start Date	Choose the first day from which to gather report data.
End Date	Choose the last day from which to gather report data.

### Attributes used in the Agent Performance Dashboard

Attribute	Description
Agent Name	This attribute enables data to be organized by certain attributes of the agent who is associated with the interaction.
Day	This attribute enables data within the reporting interval to be organized by a particular day within a month and year. Day values are presented in YYYY-MM-DD format.
Media Type	This attribute enables data to be organized by the interaction's media type—for example, Voice, Email, and Chat.
Interaction Type	This attribute enables data within the reporting interval to be organized by the type of interaction.

# Metrics used in the Agent Performance Dashboard

The Agent Performance Dashboard is divided into two tabs:

- Handle Time
- Conduct

Metric	Description
Handle Time	
Avg Handle Time (Fmt)	The average amount of time (HH:MM:SS) that the agent spent handling interactions that the agent received.  This metric is computed as handle time divided by the sum of
	accepted interactions and received consultations.
Avg Engage Time (Fmt)	The average amount of time (HH:MM:SS) that the agent was engaged with customers.
Avg Wrap Time (Fmt)	The average amount of time (HH:MM:SS) that the agent spent on customer interactions while in ACW (Wrap) state.
	The average amount of time (HH:MM:SS) that the agent had customer interactions on hold.
Avg Hold Time (Fmt)	This metric is attributed to the interval in which interactions arrived at the agent (which can differ from the interval in which the interactions were placed on hold).
Avg Consult Received Wrap Time (Fmt)	The average amount of time (HH:MM:SS) that the agent was in ACW (Wrap) state following simple consultations that the agent accepted, where the consultations were associated with customer calls.
Avg Consult Received Warm Wrap Time (Fmt)	The average amount of time (HH:MM:SS) that the agent spent in ACW (Wrap) state following consultations that the agent requested and received, where the consultations were associated with customer interactions that were transferred to or conferenced with the agent.
Avg Consult Received Warm Time (Fmt)	The average amount of time (HH:MM:SS) that the agent was engaged as a recipient in collaborations or consultations, including related hold durations, where the collaborations/consultations were associated with customer interactions.
Avg Consult Received Time (Fmt)	The average amount of time (HH:MM:SS) that the agent was engaged on collaborations or simple consultations that the agent received, where the collaborations/consultations were associated with customer interactions.
Accepted	The total number of customer interactions or warm consultations that were accepted, answered, pulled, or initiated by the agent.

Metric	Description
Conduct	
	The total number of interactions that were received or initiated by an agent.
Offered	The count includes interactions that were abandoned while inviting, handling attempts that the agent rejected, and warm consultations and conferences that the agent received. This count excludes simple consultations, whether they were initiated or received. For AG2_AGENT_QUEUE records, this metric relies on the value of the short-abandoned threshold as configured in the [agg-gim-thid-ID-IXN] section.
Accepted	The total number of customer interactions or warm consultations that were accepted, answered, pulled, or initiated by the agent.
Not Accepted	The total number of customer interactions that were redirected to another resource upon no answer by the agent or were otherwise not accepted by the agent.
Rejected	The total number of customer interactions that alerted at the agent and were not accepted.
Hold	The total number of customer interactions that the agent had on hold.
Abandon Inviting	The total number of customer interactions that were abandoned or dropped for any reason while the interactions were alerting or ringing at the agent.
Avg Handle Time	The average amount of time (HH:MM:SS) that the agent spent handling interactions that the agent received.
Agent Disconnect First	The total number of times during the reporting interval that the agent released customer interactions before the other party did.
Transfer Initiated Agent	The total number of times that the agent transferred customer interactions.
% Transfer Initiated	The percentage of accepted customer interactions that were transferred (warm or blind) by the agent.

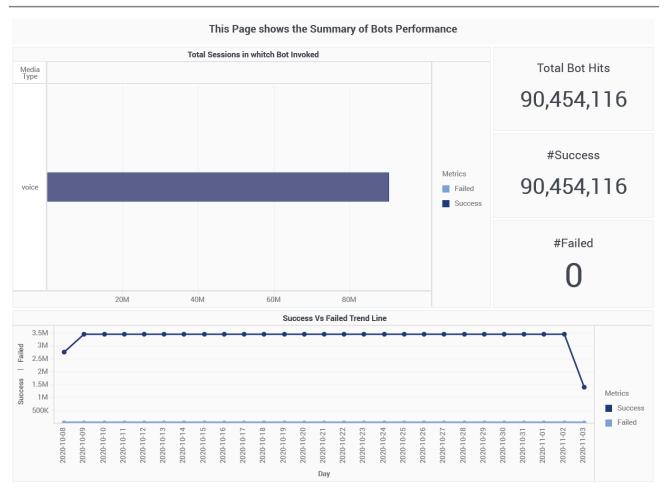
# Bot Analytical Dashboard

This page describes how you can use the (**Dashboards** > and **Designer** > folder) Bot Analytical Dashboard to learn more about bot activity, and how bots can help you improve customer experience with Genesys Designer.

Note that the term *dashboard* is used interchangeably with the term *dossier*. Dashboards / dossiers provide an interactive, intuitive data visualization, summarizing Key Performance Indicators (KPIs). You can change how you view the data in most reports and dashboards by using interactive features such as selectors, grouping, widgets, and visualizations. You can explore data through multiple paths, using text and data filtering, and layers of organization.

## Understanding the Bot Analytical Dashboard

Bot Analytical Dashboard Bot Invoked - Bot Invoked - Overview



This dashboard provides detailed reporting on bot activity during interaction flows that involve Genesys Designer applications, and contrasts self-service sessions with and without bot participation, which can help you understand how bots impact the customer experience.

The Bot Analytical Dashboard is divided into three tabs:

- **Self-Service with/without Bot** tab Contrasts self-service customer experience when bots are present / absent from the interaction.
- Bot Invoked tab Provides information about total bot hits, and summarizes bot invokation success/ failure rates.
- **Intent per Bot** tab Analyzes interaction progress and outcomes, in the context of bot participation. During its conversation with a customer, the bot attempts to identify the intent, or what it is that the customer wants to do. For example, the bot might detect that the customer wants to buy a ticket. It then proceeds to fill the required slots (or *entities*) that are associated with that intent, such as the name of the show the customer wants to buy a ticket for, the date and time they want to attend, and so on, by asking the customer to provide those details.

To get a better idea of what this dashboard looks like, view sample output from the dashboard: SampleBotAnalyticalDashboard.pdf

The following tables explain the prompts you can select when you generate the dashboard, and the metrics that are represented in the dashboard:

## Prompts for the Bot Analytical Dashboard

Prompt	Description
Pre-set Date Filter	From the list, choose a time period on which to report, and move it to the <b>Selected</b> list.
Start Date	Choose the first day from which to gather report data.
End Date	Choose the last day from which to gather report data.
Application	Choose an application on which to focus the report.
Bot	Choose a bot on which to focus the report.
Media Type	Choose a media type on which to focus the report.
Tenant	Choose a tenant on which to focus the report.

## Attributes used in the Bot Analytical Dashboard

Attribute	Description
Application Name	This attribute enables data to be organized by application.
Day	This attribute enables data to be organized by day.
Hour	This attribute enables data to be organized by hour.
Intent (Intent per Bot tab only)	This attribute enables data to be organized based on customer intent.
Last Intent (Intent per Bot tab only)	This attribute enables data to be organized by the last identified customer intent.
Media Type	This attribute enables data to be organized by the type of media.
Provider Type	This attribute enables data to be organized by the type of provider.

## Metrics used in the Bot Analytical Dashboard

The Bot Analytical Dashboard is divided into three tabs:

- Self-Service with/without Bot
- Bot Invoked
- Intent per Bot

Metric	Description
Self-Service with/without Bot tab	
Avg Self Service Bot Duration	The average duration of Self-Service SDR sessions in which bots participated
Avg Self Service No Bot Duration	The average duration of Self-Service SDR session in which no bots participated.
Bots	The total number of SDR sessions in which Self-Service was used.
Entered Bot in Self Service	The total number of Self-Service SDR sessions in which a bot participated.
Entered in Self Service	The total number of SDR sessions in which Self-Service was used.
Entered No Bot in Self Service	The total number of Self-Service SDR sessions in which no bot participated.
Self-Service Bot Duration	The total duration (in seconds) of all Self-Service SDR sessions in which bots participated.
Self-Service Duration	The total duration (in seconds) of all Self-Service SDR sessions.
Self-Service No Bot Duration	The total duration (in seconds) of all Self-Service SDR sessions in which no bots participated.
Bot Invoked tab	
Bot Hits	The total number of bot sessions. If a bot is invoked more than once within an SDR session, it is counted more than once.
Failed	The total number of failed bot sessions. This indicates that there was a condition that triggered an error, such as Designer being unable to communicate with the bot.
Success	The total number of successful bot sessions. This indicates that Designer was able to invoke the bot. A conversation with the customer took place and the bot was able to successfully identify an intent.
Intent per Bot tab	
Abandoned in Queue	The total number of interactions that entered the Self-Service phase of the Designer application, requested Assisted-Service, and were subsequently abandoned while waiting in queue.
Abandoned in Self- Service	The total number of interactions that entered the

Metric	Description
	Designer application in Self-Service and were abandoned without entering Assisted-Service.
Avg Intent Duration	The average amount of time (in seconds) that elapsed for customer intents to be recognized.
Intent Duration	The total amount of time (in seconds) that elapsed for customer intents to be recognized.
Intent Hits	The total number of customer intents that were recognized. In SDR sessions where more than one intent is recognized, each one is counted.
Routed to Agent	The total number of interactions that entered the Self-Service phase of the Designer application and were later routed to an agent.
Routed to DN	The total number of interactions that entered the Self-Service phase of the Designer application and were later routed to a DN.

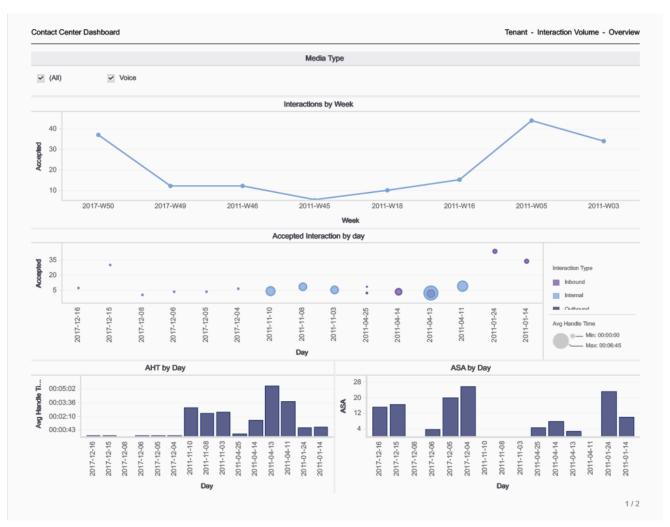
To view more detailed information about the metrics and attributes in this dashboard, and other metrics and attributes that can be used to customize reports, see the *Genesys CX Insights Projects Reference Guide*.

## Contact Center Dashboard

This page describes how you can use the Contact Center Dashboard to see detailed information about interaction volumes and KPIs for the whole contact center.

Note that the term 'dashboard' is used interchangeably with the term 'dossier'. Dashboards / dossiers provide an interactive, intuitive data visualization, summarizing key business indicators (KPIs). You can change how you view the data in most reports and dashboards by using interactive features such as selectors, grouping, widgets, and visualizations, and explore data using multiple paths, through text and data filtering, and layers of organization.

## Understanding the Contact Center Dashboard



This dashboard is designed to provide an overview of the entire contact center by conveniently displaying key information about the volume of calls, interaction times, and handle times. The dashboard is divided into two tabs:

- Interaction Volume This tab provides several views that illustrate the volume of interactions over time (by week), the volume of Accepted interactions each day, the Average Handle Time, and the Average Speed of Answer.
- Tenant KPIs This tab provides a bar chart that contrasts the Interaction Time against the Average Handle Time, and displays various rates and averages, such as Speed of Answer, Engage Time, Response Time, Hold Time, Wrap Time, and Invite Time.

Use this dashboard to evaluate the overall performance and loading of the contact center.

To get a better idea of what this dashboard looks like, view sample output from the dashboard: HRCXIContactCenterDashboard.pdf

The following tables explain the prompts you can select when you generate the dashboard, and the metrics that are represented in the dashboard:

### Prompts for the Contact Center Dashboard

Prompt	Description
Pre-set Date Filter	From the list, choose a time period on which to report, and move it to the Selected list.
Start Date	Choose the first day from which to gather report data.
End Date	Choose the last day from which to gather report data.

### Attributes used in the Contact Center Dashboard

Attribute	Description
Business Result	This attribute enables data to be organized by the configured business result.
Customer Segment	This attribute enables data to be organized by the configured customer segment.
Day	This attribute enables data within the reporting interval to be organized by a particular day within a month and year. Day values are presented in YYYY-MM-DD format.
Interaction Subtype	This attribute enables data to be organized by the interaction's subtype.
Interaction Type	This attribute enables data to be organized by the interaction's type—for example, Inbound, Outbound, or Internal.

Attribute	Description
Media Type	This attribute enables data to be organized by the interaction's media type—for example, Voice, Email, and Chat.
Service Subtype	This attribute enables data to be organized by the detailed type of service that the customer requested.
Service Type	This attribute enables data to be organized by the type of service that was assigned to the interaction.
Week	This attribute enables data within the reporting interval to be organized by week

## Metrics used in the Contact Center Dashboard

The Contact Center Dashboard is divided into two tabs:

- Interaction Volume
- Tenant KPIs

Metric	Description
Handle Time	
Accepted	The number of customer interactions that were successfully transferred (warm or blind) to an agent.
Avg Handle Time (Fmt)	The average amount of time (HH:MM:SS) that agents spent handling each interaction.
Avg Speed of Answer	The average amount of time (HH:MM:SS) that customer interactions were queued and/or alerting or ringing before the interactions were accepted by the first-handling resource.
Conduct	
Interaction Time	The total portion of agent active time that the agents were busy processing interactions.
Avg Handle Time (Fmt)	The average amount of time (HH:MM:SS) that this agent spent handling interactions that the agent received.
	This metric is computed as handle time divided by the sum of accepted interactions and received consultations.
Accepted	The number of customer interactions that were successfully transferred (warm or blind) to this agent.
% Abandoned Waiting	The percentage of customer interactions that were abandoned by the caller during the reporting interval.

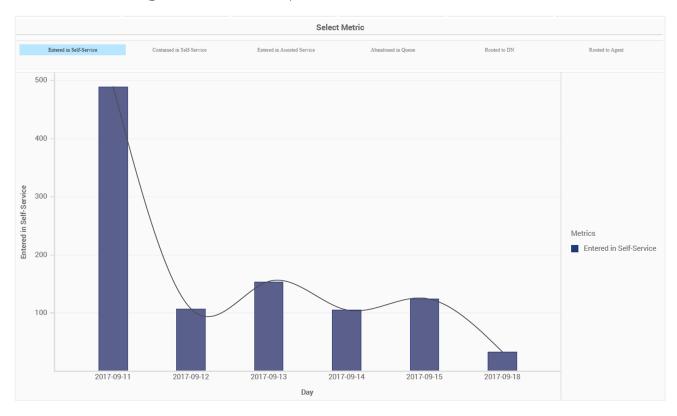
Metric	Description
% Transfer Initiated Agent	The percentage of accepted customer interactions that were transferred (warm or blind) by the agent.
Avg Speed of Answer	The average amount of time (HH:MM:SS) that customer interactions were queued and/or alerting or ringing before the interactions were accepted by the first-handling resource.
Avg Engage Time (Fmt)	The average amount of time (HH:MM:SS) that this agent was engaged with customers.
Avg Finish Response Time (Fmt)	The average duration of completed customer interactions that both had a response by a handling resource. This duration includes the entire lifespan of the interaction, including processing, queueing, and handling.
Avg Hold Time (Fmt)	The average amount of time (HH:MM:SS) that this agent had customer interactions on hold.  This metric is attributed to the interval in which interactions arrived at the agent (which can differ from the interval in which the interactions were placed on hold).
Avg Wrap Time (Fmt)	The average amount of time (HH:MM:SS) that this agent spent on customer interactions while in ACW (Wrap) state.
Avg Invite Time	The average amount of time (HH:MM:SS) that customer interactions alerted or rang at agent resources before the interactions were accepted, plus the average duration of dialing that agents performed, where the calls were successfully established. This metric is attributed to the interval in which the interactions began.

# Final Disposition Dashboard

This page describes how you can use the (**Dashboards** > and **Designer** > folder) Final Disposition Dashboard to analyze trends in interaction outcomes by viewing detailed information over time periods you specify, about the number and percentage of interactions that enter the Designer Application and conclude in the Self-Service phase, compared to the number that enter the Assisted-Service phase and are routed to a DN or agent.

Note that the term *dashboard* is used interchangeably with the term *dossier*. Dashboards / dossiers provide an interactive, intuitive data visualization, summarizing Key Performance Indicators (KPIs). You can change how you view the data in most reports and dashboards by using interactive features such as selectors, grouping, widgets, and visualizations. You can explore data through multiple paths, using text and data filtering, and layers of organization.

### Understanding the Final Disposition Dashboard



This dashboard is designed to provide an overview of interaction outcomes by visualizing key KPIs over time, which can help you spot trends in customer outcomes.

Use this dashboard to compare today's numbers to previous days. By default, the dashboard shows

the past week, but you can run it across longer periods of time. In the **Select Metric** bar, choose which metric to view in the bar chart.

To get a better idea of what this dashboard looks like, view sample output from the dashboard: HRCXIFinalDispositionDashboard.pdf

The following tables explain the prompts you can select when you generate the dashboard, and the attributes and metrics that are represented in the dashboard:

### Prompts for the Final Disposition Dashboard

Prompt	Description
Pre-set Date Filter	From the list, choose a time period on which to report, and move it to the <b>Selected</b> list.
Start Date	Choose the first day from which to gather report data.
End Date	Choose the last day from which to gather report data.
Application	Choose an application on which to focus the report.

### Attributes used in the Final Disposition Dashboard

Attribute	Description
Application Name	This attribute enables data to be organized by application.
Day	This attribute enables data to be organized by day.
Hour	This attribute enables data to be organized by hour.
Month	This attribute enables data to be organized by month.
Week	This attribute enables data to be organized by week.
Subhour	This attribute enables data to be organized by 15 / 30 minutes intervals.

### Metrics used in the Final Disposition Dashboard

Metric	Description
Abandoned in Queue	The total number of interactions that entered the Self-Service phase of the Designer application, requested Assisted-Service, and were subsequently

Metric	Description
	abandoned while waiting in queue.
Contained in Self- Service	The total number of interactions that entered the Designer application in Self-Service and were concluded without entering Assisted-Service.
Entered in Assisted Service	The total number of interactions that entered the Designer application in Assisted-Service.
Entered in Self- Service	The total number of interactions that entered the Designer application in Self-Service.
Routed to Agent	The total number of interactions that entered the Self-Service phase of the Designer application and were later routed to an agent.
Routed to DN	The total number of interactions that entered the Self-Service phase of the Designer application and were later routed to a DN.

To view more detailed information about the metrics and attributes in this dashboard, and other metrics and attributes that can be used to customize reports, see the *Genesys CX Insights Projects Reference Guide*.

# Milestone Path Analysis Dashboard

The (**Designer** folder) Milestone Path Analysis Dashboard provides detailed information and visualizations illustrating the first and last milestones customers traversed, and the number of sessions that ended in each final disposition.

### Understanding the Milestone Path Analysis Dashboard

The Milestone Path Analysis Dashboard is divided into two tabs:

- **Milestone Analysis** tab Views on this tab allow you to explore the first and last milestones users encountered and the number of sessions that terminate in each configured outcome (Final Disposition). This tab offers four dynamic, interactive views:
  - Data View Detailed information about the number of sessions, first and last milestones, and disposition.
  - Visual View This sankey diagram view provides an interactive visual representation that explores
    the session count from the first milestone to the last milestone, including the disposition. Hover
    over visual elements to learn what each number represents, or use the Filter option to focus on
    particular milestones or days. Optionally, you can edit the dashboard to show full text labels,
    instead of only values.
  - Final Dispositions Detailed and visual representations of the number of sessions that reached each Final Disposition. Hover over visual elements to learn what each number represents, or use the Filter option to focus on particular milestones or days.
  - Last Milestone View Detailed information, sorted by day, about the Last Milestone sessions
    passed before completion. Optionally, remove the Day attribute from this view, to organize data by
    Final Disposition.
- Views on the Milestone Analysis tab



Data View



Sankey View



Final Disposition



Last Milestone View

- **ANI Analysis** tab Detailed information about the Final Disposition for each caller, based on Automatic Number Identification (ANI), and sorted by day. Use the Filter option to focus on specific ANIs, or add additional columns.
- · Views on the ANI Analysis tab



Final Disposition

To get a better idea of what this dashboard looks like, view sample output from the dashboard: SampleMilestonePathAnalysisDashboard.pdf

Link to video Link to video Link to video

The following tables explain the prompts you can select when you generate the dashboard, and the metrics and attributes that are represented in the dashboard:

### Prompts for the Milestone Path Analysis Dashboard

Prompt	Description
Pre-set Date Filter	From the convenient list of predefined dates, choose a date for which to run the report.
Start Date	Choose the first day from which to gather data into the dashboard.
End Date	Choose the last day from which to gather data into the dashboard.
Application	Optionally, select one or more Designer applications on which to focus the report.

### Attributes used in the Milestone Path Analysis Dashboard

Attribute	Description
ANI	Enables data to be organized by the Automatic Number Identification (ANI), which is the number associated with the originator of the call.
Day	Enables data to be organized by day.
Start Milestone	Enables data to be organized by the name of the first milestone the call passed.
Last Milestone	Enables data to be organized by the name of the last milestone the call passed before entering Assisted Service.
Final Disposition	Enables data to be organized by the status assigned to a call when the caller exited the call flow (such as Abandoned in Self-service, Abandoned in Queue, Routed to Agent, System Error, Terminated, or Other). This status is set by the system.

### Metrics used in the Milestone Path Analysis Dashboard

Metric	Description					
Session Count	The total number of sessions that encountered each milestone or milestone path.					

To view more detailed information about the metrics and attributes in this dashboard, and other metrics and attributes that can be used to customize reports, see the *Genesys CX Insights Projects* 

Reference Guide.

# Supervisor Dashboard

This page describes how you can use the Supervisor Dashboard to see detailed information about agent activities, interactions, and states.

Video: Introducing the Supervisor Dashboard

#### Link to video

This video describes how to use the Supervisor Dashboard.

### Understanding the Supervisor Dashboard

	Offero 265			A	ccep 23			Avg Handle Ti 00:00:39				Avg Engage Ti 00:00:23					Avg Hold Time 00:00:29					Avg Wrap Time 00:00:14		
	usy <sup>*</sup>		е	% Ready Time  % Not Ready Ti 77.70%				% Occupancy 3.15%				%	% Engage Time 0.23%					% Hold Time 0.12%						
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		.3	3)			Agent Nan	ne						.3	3	3		jent Na	ime						

Specially designed for contact center supervisors, this dashboard conveniently displays key information about interactions and agents, including the number of interactions offered and accepted, various durations, such as the average handle time and average engage time, and the percentage of the time agents collectively spent on various activities.

In addition, the dashboard provides a graph of the number of calls offered over time, and bar charts illustrating occupancy for each agent, with a corresponding chart for each agent illustrating the percentage of the agent's time spent in each state (Ready, Not Ready, Busy).

Use this dashboard to evaluate interaction handling and agent performance at a glance. It includes both key information about interaction volume and customer experience, and charts to illustrate each agent's activity during the reporting period.

To get a better idea of what this report looks like, view sample output from the report: HRCXISupervisorDashboard.pdf

The following tables explain the prompts you can select when you generate the dashboard, and the metrics that are represented in the dashboard:

## Prompts for the Supervisor Dashboard

Prompt	Description
Pre-set Date Filter	From the list, choose a time period on which to report, and move it to the Selected list.
Start Date	Choose the first day from which to gather report data.
End Date	Choose the last day from which to gather report data.
Agent	Optionally, select one or more agents to include in the report.
Agent Group	Optionally, select one or more agent groups to include in the report.
Media Type	Optionally, select the type of media to include in the report—for example, VOICE, EMAIL, and CHAT.
Interaction Type	Optionally, select the type of interaction to include in the report—for example, Inbound, Outbound, and Internal.
Tenant	For multi-tenant environments, optionally select the tenant(s) for which to include data in the report.

### Attributes

Attribute	Description
Agent Name	This attribute enables data to be organized by certain attributes of the agent who is associated with the interaction.
Business Result	This attribute enables data to be organized by the configured business result.
Customer Segment	This attribute enables data to be organized by the configured customer segment.
Day	This attribute enables data within the reporting interval to be organized by a particular day within a month and year. Day values are presented in YYYY-MM-DD format.
Interaction Type	This attribute enables data to be organized by the interaction's type—for example, Inbound, Outbound, and Internal.
Media Type	This attribute enables data to be organized by the interaction's media type—for example, Voice, Email, and Chat.
Service Type	This attribute enables data to be organized by the type of service that was assigned to the interaction.

Attribute	Description
Tenant	This attribute enables data within the reporting interval to be organized by tenant.

### Metrics used in the Supervisor Dashboard

The Supervisor Dashboard is composed of three report-style components, so the following table is divided accordingly:

- Agent Interaction State
- Agent Summarized State
- Agent Activity

Metric	Description
Agent Interaction State	
% Engage Time	The percentage of time within the interval that this agent was engaged with customers, relative to the total duration within the interval of the agent's active session on a particular media channel.
% Hold Time	The percentage of time that this agent had customer interactions on hold within the interval, relative to the total duration of the agent's active session within the interval.
% Invite Time	The percentage of time that customer interactions spent in Invite Time, relative to the total duration of the agent's active session within the interval.
% Ixn Wrap Time	The percentage of time within the interval that this agent spent in ACW (Wrap) state related to customer calls, relative to the total duration of the agent's active session within the interval.
Engage Time (Fmt)	The total amount of time that this agent was engaged with customers on interactions that the agent received within the interval or within a prior interval and ensued in this interval. This metric might include engagement time for interactions that the agent made or received while in the Not Ready or ACW (Wrap) states (if the underlying ICON application supplying data to Genesys Info Mart is configured appropriately.)  This metric excludes engagement time that is associated with collaborations, consultations, and other interaction-related durations, such as hold time, ACW time, and alert (ring) time.
Hold Time (Fmt)	The total amount of time within the interval that this agent had customer interactions on hold. This metric counts all held durations for interactions, whether they were placed on hold once or more than once.

	Description
Invite Time (Fmt)	The total amount of time attributable to the interval that customer interactions alerted or rang at agents plus the total duration of the dialing that agents performed.
	For the alerting component of this metric, interactions do not have to be established for this metric to be incremented. For the dialing component, dial duration is metricd for established calls only.
Ixn Busy Time (Fmt)	The total amount of time within the interval that this agent was busy processing interactions. The time that an agent is busy is calculated as the sum of dialing for established interactions and alerting duration (Invite Time), engage/talk duration, hold duration, ACW (Wrap) duration (for interaction-related ACW), and amount of time that the agent spent processing consult interactions that the agent received.
	This metric excludes Ringing Time, Consult Ixn Wrap Time, Consult Invite Time, and Invite Time for Abandoned Inviting.
Ixn Wrap Time (Fmt)	The total amount of time within the interval that this agent spent in ACW (Wrap) state for customer calls that the agent received.
Agent Summarized State	
% Busy Time	The percentage of time of all interaction-processing activities.
% Not Ready Time	The percentage of time within the interval that this agent's state was NotReady, relative to the total duration within the interval of the agent's active session on a particular media channel.
% Occupancy	The percentage of time that this agent's state was Busy within the interval, relative to the total duration within the interval of the agent's active session on a particular media channel. This metric reflects the percentage of time that agents actually spent handling interactions against their available or idle time.
	This metric is computed as active time minus ready and not-ready time divided by the difference of active and not-ready time.
% Other State Time	The percentage of time within the interval that this agent's state was neither Ready nor NotReady after login, relative to the total duration within the interval of the agent's active session on a particular media channel.  The situation in which an agent's state is neither Ready nor
	NotReady can occur if the switch, for instance, does not force agents' DNs into the Ready state upon login.
% Ready Time	The percentage of time within the interval that this

Metric	Description
	agent's state was Ready, relative to the total duration within the interval of the agent's active session on a particular media channel.
% Wrap Time	The percentage of time that this agent spent in ACW (Wrap) state within the interval, relative to the total duration of the agent's active session within the interval.
Active Time (Fmt)	The total amount of time attributable to the interval between the beginning and end of this agent's login session(s) on a particular media channel. In the scenario in which an agent logs into multiple switches, DNs, and/or queues, this metric starts the moment at which the agent logs in to the first switch/DN/queue (if this login falls within the interval) and ends at the moment at which the agent is no longer logged in to any switch/DN/queue (if logout falls within the interval).
	If the agent is not forcibly logged out when the calendar day ends, login duration is split over both days.
Busy Time (Fmt)	The total duration of all of interaction-processing activities including the time that is associated with requests for consultation that the agent received and excluding the time spent processing after-call work.
Not Ready Time (Fmt)	The total amount of time within the interval that this agent was in the NotReady state for a particular media channel (including Do Not Disturb duration, if configured) regardless of whether a reason was indicated.
Other State Time (Fmt)	The total amount of time that the state of this agent was neither Ready nor NotReady after login to a particular media channel. The situation in which the state of an agent is neither Ready nor NotReady usually occurs upon first login if the switch, for instance, does not force agents into the Ready state upon login.
Ready Time (Fmt)	The total amount of time that this agent was in the Ready state for a particular media type.
Wrap Time (Fmt)	The total amount of time within the interval that this agent spent in ACW (Wrap) state whether or not the reason for entering this state was related to an interaction.
Agent Activity	
Accepted	The percentage of accepted customer interactions that were successfully transferred (warm or blind) to this agent.
Avg Engage Time (Fmt)	The average amount of time that this agent was engaged with customers.
Avg Handle Time (Fmt)	The average amount of time that this agent spent

Metric	Description
	handling interactions that the agent received.
	This metric is computed as handle time divided by the sum of accepted interactions and received consultations.
Avg Hold Time (Fmt)	The average amount of time that this agent had customer interactions on hold.
	This metric is attributed to the interval in which interactions arrived at the agent (which can differ from the interval in which the interactions were placed on hold).
Avg Revenue	The average amount of revenue that is generated for interactions handled by this agent.
	The average considers only those interactions for which revenue was generated.
A. v. G. Nie G. vii e. v.	The average customer-satisfaction score of interactions handled by this agent.
Avg Satisfaction	The tally considers only those interactions for which customer satisfaction was recorded.
Avg Wrap Time (Fmt)	The average amount of time that this agent spent on customer interactions while in ACW (Wrap) state.
Offered	The total number of times that interactions were received or initiated by an agent.
	The count includes interactions that were abandoned while inviting, handling attempts that the agent rejected, and warm consultations and conferences that the agent received. This count excludes simple consultations, whether they were initiated or received. For AG2_AGENT_QUEUE records, this metric relies on the value of the <b>short-abandoned threshold</b> as configured in the <b>[agg-gim-thld-ID-IXN]</b> section.

## Queue Dashboard

This page describes how you can use the Queue Dashboard to compare the performance of queues by viewing detailed information about agent performance on a queue-by-queue basis.

Note that the term 'dashboard' is used interchangeably with the term 'dossier'. Dashboards / dossiers provide an interactive, intuitive data visualization, summarizing key business indicators (KPIs). You can change how you view the data in most reports and dashboards by using interactive features such as selectors, grouping, widgets, and visualizations, and explore data using multiple paths, through text and data filtering, and layers of organization.

### Understanding the Queue Dashboard



The dashboard is divided into two tabs:

- KPIs The KPIs tab provides an overview of Queue performance by illustrating several Key Performance Indicators (KPI), notably Accepted Service Level (by queue) and % Accepted Service Level. It also provides at-a-glance summary information about distribution rates and times, and other metrics such as abandoned, clear, transfer and redirection. You can:
  - From the **Media Type** list, select a media type to narrow the focus of the dashboard.

- In the **Queue** bar graph, click on any queue to focus the dashboard on that queue.
- Daily Summary Provides daily and hourly charts of interaction volume, contrasting the number entering each queue against the number accepted from each queue. You can:
  - From the **Queue** list, select a queue to narrow the focus of the dashboard.
  - From the **Media Type** list, select a media type to narrow the focus of the dashboard.
  - In the **Interactions Entered by queue** or **Interactions Entered vs Accepted** bar graph, click on any day to focus the dashboard on that day.

Use this dashboard to evaluate the overall performance of queues in your contact center, and compare the performance of each one against similar queues. Select an individual queue to focus on the performance of that queue.

To get a better idea of what this dashboard looks like, view sample output from the dashboard: HRCXIQueueDashboard.pdf

The following tables explain the prompts you can select when you generate the dashboard, and the metrics that are represented in the dashboard:

### Prompts for the Queue Dashboard

Prompt	Description
Pre-set Date Filter	From the list, choose a time period on which to report, and move it to the Selected list.
Start Date	Choose the first day from which to gather report data.
End Date	Choose the last day from which to gather report data.

### Attributes used in the Queue Dashboard

Attribute	Description
Day	This attribute enables the organization of data based on the hour at which the interaction occurred.
Hour	This attribute enables data within the reporting interval to be organized by a particular hour.
Interaction Type	This attribute enables data to be organized by the interaction's type—for example, Inbound, Outbound, or Internal.
Media Type	This attribute enables data to be organized by the interaction's media type—for example, Voice, Email, and Chat.
Queue	This attribute enables data to be organized by

### Metrics used in the Queue Dashboard

The Queue Dashboard is divided into two tabs:

- Handle Time
- Conduct

Metric	Description
KPIs	
	The total number of customer interactions that entered the queue and were received or initiated by an agent.
Offered	The count includes interactions that were abandoned while inviting, handling attempts that the agent rejected, and warm consultations and conferences that the agent received. This count excludes simple consultations, whether they were initiated or received. For AG2_AGENT_QUEUE records, this metric relies on the value of the short-abandoned threshold as configured in the [agg-gim-thld-ID-IXN] section.
Accepted	The total number of customer interactions or warm consultations that entered the queue and were accepted, answered, pulled, or initiated by an agent.
% Abandoned Waiting	The percentage of customer interactions that entered this queue and later were abandoned, relative to the total number of customer interactions that entered entered this queue during the reporting interval.
% Transfer Initiated	The percentage of accepted customer interactions that were transferred (warm or blind) by an agent.
ASA	Avg Speed of Answer — The average amount of time (HH:MM:SS) that customer interactions were queued and/or alerting or ringing before the interactions were accepted by the first-handling resource.
Avg Distribute Time	The average amount of time (HH:MM:SS) that customer interactions or established warm consultations spent in this queue before they were distributed.
Avg Abandoned Waiting Time	The average amount of time (HH:MM:SS) that interactions that entered this queue waited within the contact center before customers abandoned the interactions or before they were dropped for any reason. This average includes interactions that were abandoned or dropped within the shortabandoned threshold and excludes interactions that were abandoned or dropped while they were alerting (ringing) at an agent's desktop.
Avg Clear Time	The average amount of time (HH:MM:SS) that customer interactions spent in a queue before they

Metric	Description
	were cleared from this virtual queue.
Max Abandoned Waiting Time	The longest amount of time (HH:MM:SS) that customers waited at this queue before abandoning the interactions and before the interactions could be distributed.
Redirected	The total number of customer interactions that entered this queue, rang at a routing target, and were redirected upon no acceptance/answer by an agent.
Accepted Service Level	The service level of this queue measured as the total number of interactions that entered this queue during the reporting period, and were accepted within the acceptance threshold.
% Accepted	The percentage of customer interactions and warm consultations that entered this queue and were subsequently distributed and accepted to the total number of interactions that entered this queue.
Daily Summary	
Entered	The total number of customer interactions or established warm consultations that entered this queue.
Accepted	The total number of customer interactions or warm consultations that entered the queue and were accepted, answered, pulled, or initiated by an agent.

### Transfer Dashboard

This page describes how you can use the (**Dashboards** folder) Transfer Dashboard to learn about how agent time was spent when handling contact center interactions that involve a transfer, consult, or conference, whether warm or cold.

Note that the term 'dashboard' is used interchangeably with the term 'dossier'. Dashboards / dossiers provide an interactive, intuitive data visualization, summarizing key business indicators (KPIs). You can change how you view the data by using interactive features such as selectors, grouping, widgets, and visualizations, and explore data using multiple paths, though text, data filtering, and layers of organization.

### Understanding the Transfer Dashboard



The Agent Transfer Summary tab

The **Transfer** Dashboard provides a dashboard-style summary that tracks a wide variety of metrics related to transfers, consult, and conference calls.

The Transfer Dashboard provides two distinct views of the data, on two tabs:

• The Agent Transfer Summary tab — This tab provides summary information about how individual agent time was spent when handling contact center interactions that involve a transfer, consult, or conference, whether warm or cold.



The Daily Transfer Summary tab

• The Daily Transfer Summary tab — This tab provides summary information about how agent time was spent in aggregate, over the course of a day, when handling contact center interactions that involve a transfer, consult, or conference, whether warm or cold.

To get a better idea of what this dashboard looks like, view sample output from the report: Sample Transfer Dashboard.pdf

The following table explains the prompts you can select when you generate the Transfer Dashboard:

#### **Prompts on the Transfer Dashboard**

Prompt	Description
Pre-set Date Filter	Choose a date from the list of preset options. If this prompt is set to anything other than <b>none</b> , the Report Date prompt is ignored. Default: <b>Year to Date</b>
Start Date	Choose the first date on which to report. This prompt has no effect if Pre-set Date Filter is set to anything other than <b>none</b> .
End Date	Choose the last date on which to report. This prompt has no effect if Pre-set Date Filter is set to anything other than <b>none</b> .
Agent Group	Select one or more agent groups on which to focus the report.
Agent	Select one or more agents on which to focus the report.
Media Type	Select one or more media types on which to focus the report.
Interaction Type	Select one or more interaction types on which to focus the report.
Tenant	Select one or more tenants on which to focus the report.

### Agent Transfer Summary tab

The following table explains the attributes used on this tab:

#### **Attributes on the Agent Transfer Summary tab**

3	,
Attribute	Description
Agent Name	Enables the organization of data based on Agent Name.
Day	Enables the organization of data based on the day/ date on which the interaction occurred.
Interaction Type	Enables the organization of data based on interaction type. For example: Inbound, Outbound, or Internal.
Media Type	Enables the organization of data based on media type. For example: Voice, Email, or Chat.

The following table explains the metrics used on the Agent Transfer Summary tab:

#### **Metrics on the Agent Transfer Summary tab**

Metrics	Description
Unique Interactions: Entered	The total number of customer interactions that entered or began within the contact center and

	were assigned this business attribute. This count includes abandoned interactions.
Unique Interactions: Accepted	The total number of customer interactions of this business attribute that were accepted, answered, pulled, or initiated by a handling resource.
Offered	Total number of times that interactions were received or initiated (by this Agent, Agent Group, or Agent and Queue, depending on the relevant GCXI Project attributes for this metric).
Accepted	Total number of times that interactions/warm consultations were accepted, answered, pulled, or initiated (by Agent, Group, or Agent and Queue, depending on the relevant GCXI Project attributes for this metric).
Avg Handle Time	The average amount of time, in seconds, spent handling interactions received (by this Agent, Agent Group, or Agent and Queue, depending on the relevant GCXI Project attributes for this metric).
Transfer Offered	Total number of times that customer interactions arrived by transfer and were offered (for this Agent, Agent Group, or Agent and Queue, depending on the relevant GCXI Project attributes for this metric).
Receiving Transfers: Transfer Accepted	The total number of times that customer interactions were successfully transferred (for this Agent, Agent Group, or Agent and Queue, depending on the relevant GCXI Project attributes for this metric).
Receiving Transfers: Transfer Accepted Cold	The total number of times that customer interactions were successfully cold transferred and accepted by the agent / agent group (depending on the relevant GCXI Project attributes for this metric) during the reporting interval.
Receiving Transfers: Transfer Accepted Warm	The total number of times that customer interactions were successfully warm transferred and accepted by the agent / agent group (depending on the relevant GCXI Project attributes for this metric) during the reporting interval.
Initiating Transfers: Transfer Initiated Agent	The total number of customer interactions of this business attribute that agents transferred. Both warm and blind transfers are reflected in this Metric.
Initiating Transfers: Transfer Initiated Agent Cold	Total number of cold transfers initiated by the agent / agent group (depending on the relevant GCXI Project attributes for this metric) during the reporting interval.
Initiating Transfers: Transfer Initiated Agent Warm	Total number of warm transfers initiated by the agent / agent group (depending on the relevant GCXI Project attributes for this metric) during the reporting interval.
Initiating Transfers: % Transfer Initiated	The percentage of accepted customer interactions that were transferred (warm or blind) (for this

	Agent or Agent Group, depending on the relevant GCXI Project attributes for this metric).
Avg Received Transfers Handle Time: All	The average amount of time, in seconds, that agents spent handling interactions assigned this business attribute, that arrived by transfer and were accepted by the agents during the reporting interval. (Based on Business Attribute > BA Consults > Avg Transfer Accepted Handle Time)
Avg Received Transfers Handle Time: This Agent	Average Handle Time for the interactions that arrived by transfer and were handled during the reporting interval. This metric includes only the time spent by the receiving agent. (Agent > Activity > Avg Transfer Accepted Handle Time)
Average Transfer Initiated Handle Time (this Agent)	Average Handle Time for the interactions that were transferred and handled during the reporting interval. This metric includes only the time spent by the transferring agent.
Conference Participation by the Agent: Conference Offered	The total number of Conference interactions offered to the agent / agent group (depending on the relevant GCXI Project attributes for this metric) during the reporting interval.
Conference Participation by the Agent: Conference Accepted	The total number of times that this Agent, Agent Group, or Agent and Queue (depending on the relevant GCXI Project attributes for this metric) joined conferences to participate in customer interactions. (Based on Agent > Activity > Conference Received Accepted)
Conference Participation by the Agent: Conference Initiated	The total number of times that this Agent, Agent Group, or Agent and Queue, (depending on the relevant GCXI Project attributes for this metric) successfully initiated conferences for received customer interactions.
Consult Participation by the Agent: Consult Offered	The total number of Consult interactions offered to the agent / agent group (depending on the relevant GCXI Project attributes for this metric) during the reporting interval.
Consult Participation by the Agent: Consult Accepted	Total number of times collaborations/consultations associated with interactions were received and accepted by Agent, Group, or Agent and Queue, (depending on the relevant GCXI Project attributes for this metric). (Based on Agent > Activity > Consult Received Accepted)
Consult Participation by the Agent: Consult Initiated	The total number of collaborations/consultations associated with interactions and initiated by the Agent, Agent Group, or Agent and Queue, depending on the relevant GCXI Project attributes for this metric.
Avg Conference Accepted Handle Time (this Agent)	Average Handle Time for Conference interactions in which the agent participated. This metric includes time spent by all agents who participated in handling the interaction after this agent joined.
Avg Consult Participation Handle Time: All	The average amount of time, in seconds, that

	agents spent in collaboration or simple consultation for customer interactions that were assigned this business attribute. (Based on Business Attribute > BA Consults > Avg Consult Received Time)
Avg Consult Participation Handle Time: This Agent	Average number of seconds that the agent was engaged as a recipient in collaborations/ consultations associated with interactions (for Agent, Group, or Agent and Queue, depending on the relevant GCXI Project attributes for this metric). (Based on Agent > Activity > Avg Consult Received Time)

### Daily Transfer Summary tab

The following table explains the attributes used on this tab:

#### **Attributes on the Daily Transfer Summary tab**

Attribute	Description
Day	Enables the organization of data based on the day/ date on which the interaction occurred.
Media Type	Enables the organization of data based on media type. For example: Voice, Email, or Chat.
Interaction Type	Enables the organization of data based on interaction type. For example: Inbound, Outbound, or Internal.

The following table explains the metrics used on the Daily Transfer Summary tab:

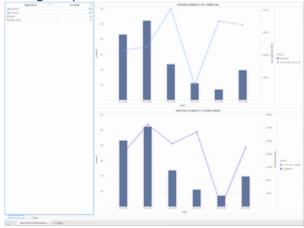
#### **Metrics on the Daily Transfer Summary tab**

Metrics	Description
Unique Interactions: Offered	The total number of customer interactions that entered or began within the contact center during the interval, were assigned this business attribute, and were offered to a resource excluding interactions that were abandoned within the shortabandoned threshold.  This metric relies on the value of the short-abandoned threshold as configured in the [agg-gim-thld-ID-IXN] section.
Unique Interactions: Accepted	The total number of customer interactions of this business attribute that were accepted, answered, pulled, or initiated by a handling resource.
Unique Interactions: Avg Handle Time	The average amount of time, in seconds, that agents spent handling interactions assigned this business attribute.
Initiating Transfers: Transfer Initiated	The total number of customer interactions of this business attribute that agents transferred. Both warm and blind transfers are reflected in this

	Metric.
Initiating Transfers: Transfer Initiated Cold	Total number of cold transfers of interactions assigned this business attribute, that were initiated by the agent during the reporting interval.
Initiating Transfers: Transfer Initiated Warm	Total number of warm transfers of interactions assigned this business attribute, that were initiated by the agent during the reporting interval.
Receiving Transfers: Transfer Accepted	Total number of interactions, assigned this business attribute, that arrived by transfer and were accepted by the agent during the reporting interval.
Receiving Transfers: Transfer Accepted Cold	Total number of interactions, assigned this business attribute, that arrived by cold transfer and were accepted by the agent during the reporting interval.
Receiving Transfers: Transfer Accepted Warm	Total number of interactions, assigned this business attribute, that arrived by warm transfer and were offered to the agent during the reporting interval.
Receiving Transfers: Avg Transfer Accepted Handle Time	The average amount of time, in seconds, that agents spent handling interactions assigned this business attribute, that arrived by transfer and were accepted by the agent during the reporting interval.
Transfer Rate	The percentage of interactions that were transferred. Calculated as the total number of transferred interactions divided by the total number of interactions.
Conference Initiated Agent	The total number of times that agents initiated conferences for customer interactions that the agents received where the interactions were established and were of this business attribute.
Consult Received Accepted	The total number of interactions of this business attribute that included requests for collaboration or consultation where the collaborations/consultations were associated with customer interactions.

# Weekly Agent Group Performance Dashboard

The (**Dashboards** and **Agents** folders) Weekly Agent Group Performance Dashboard provides visualizations that illustrate weekly interaction handling at the group level.



Weekly Agent Group Performance Dashboard

### Understanding the Weekly Agent Group Performance Dashboard

The Weekly Agent Group Performance Dashboard provides two views that you can use to monitor the interaction processing performance of agent groups:

- Interaction Accepted Vs AHT Weekly View Charts the number of Interactions Accepted against the Average Handle Time for the selected groups.
- Interaction Accepted Vs % Transfers Initiated Charts the number of Interactions Accepted against the percentage of interactions that were transferred from the selected groups.

The report shows data for all the groups, or for the ones you select on the prompts page. Once you have run the report, you can make a selection in the Agent Group / Accepted list to dynamically focus on a specific group. To get a better idea of what this dashboard looks like, view sample output from the dashboard:

#### Sample Weekly Agent Group Performance Dashboard

#### Link to video

The following tables explain the prompts you can select when you generate the dashboard, and the metrics and attributes that are represented in the dashboard:

# Prompts available for the Weekly Agent Group Performance Dashboard

The following table describes prompts available for the the Weekly Agent Group Performance Dashboard:

Prompt	Description
Pre-set Date Filter	From the convenient list of predefined dates, choose a date for which to run the report.
Start Date	Choose the first day from which to gather data into the dashboard.
End Date	Choose the last day from which to gather data into the dashboard.
Agent Group	Optionally, select one or more agent groups on which to focus the report.
Media Type	Optionally, select one or more media types to include in the report—for example, VOICE, EMAIL, and CHAT.
Interaction Type	Optionally, select the type of interaction to include in the report—for example, Inbound, Outbound, and Internal.
Tenant	For multi-tenant environments, optionally select one or more tenants on which to focus the report.

### Attributes used in the Weekly Agent Group Performance Dashboard

The following table describes attributes used on the Weekly Agent Group Performance Dashboard:

Attribute	Description
Agent Group	Click values in this column to focus the report on specific groups.
Week	Enables data within the reporting interval to be organized by a particular week (1-53).

### Metrics used in the Weekly Agent Group Performance Dashboard

The following table describes metrics used on the Weekly Agent Group Performance Dashboard:

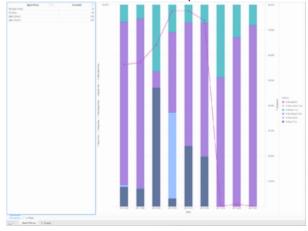
Metric	Description
Accepted	The total number of times that customer

Metric	Description
	interactions or warm consultations were accepted, answered, pulled, or initiated by agents who belong to this agent group.
Avg Handle Time (Fmt)	The average amount of time, in seconds, that agents who belong to this agent group spent handling interactions that the agents received.  This metric is computed as handle time divided by the sum of accepted interactions and received consultations.
% Transfer Initiated	The percentage of accepted customer interactions

To view more detailed information about the metrics and attributes in this dashboard, and other metrics and attributes that can be used to customize reports, see the *Genesys CX Insights Projects Reference Guide*.

# Weekly Agent Group Utilization Dashboard

The (**Dashboards** and **Agents** folders) Weekly Agent Group Utilization Dashboard provides visualizations you can use to understand how much of agent total active time was spent in each state.



Weekly Agent Group Utilization Dashboard

### Understanding the Weekly Agent Group Utilization Dashboard

The Weekly Agent Group Utilization Dashboard charts agent occupancy against a breakdown of the duration of the different states that an agent can be in (Ready, Not Ready, Busy, Other, and Wrap) as percentages, fully accounting for the interaction time (time spent handling interactions) for the agents in the group.

To get a better idea of what this dashboard looks like, view sample output from the dashboard:

SampleWeekly Agent Group Utilization Dashboard .pdf

#### Link to video

The following tables explain the prompts you can select when you generate the dashboard, and the metrics and attributes that are represented in the dashboard:

# Prompts available for the Weekly Agent Group Utilization Dashboard

The following table lists the prompts available for the Weekly Agent Group Utilization Dashboard:

Prompt	Description
Pre-set Date Filter	From the convenient list of predefined dates, choose a date for which to run the report.
Start Date	Choose the first day from which to gather data into the dashboard.
End Date	Choose the last day from which to gather data into the dashboard.
Agent Group	Optionally, select one or more agent groups on which to focus the report.
Media Type	Optionally, select one or more media types to include in the report—for example, VOICE, EMAIL, and CHAT.
Interaction Type	Optionally, select the type of interaction to include in the report—for example, Inbound, Outbound, and Internal.
Tenant	For multi-tenant environments, optionally select one or more tenants on which to focus the report.

### Attributes used on the Weekly Agent Group Utilization Dashboard

The following table lists the attributes used on the Weekly Agent Group Utilization Dashboard:

Attribute	Description
Agent Group	Click values in this column to focus the report on specific groups.
Week	Enables data within the reporting interval to be organized by a particular week (1-53).

### Metrics used on the Weekly Agent Group Utilization Dashboard

The following table lists the metrics used on the Weekly Agent Group Utilization Dashboard:

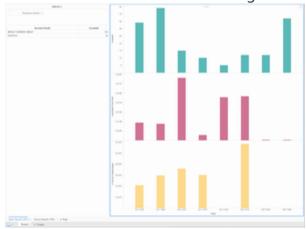
Metric	Description
Accepted	The total number of times that customer interactions or warm consultations were accepted, answered, pulled, or initiated by agents who belong to this agent group.
% Occupancy	The percentage of time that this agent's state was Busy within the interval, relative to the total duration within the interval of the agent's active session on a particular media channel.  This metric reflects the percentage of time that agents actually spent handling interactions against their available or idle time.

Metric	Description
	This metric is computed as active time minus ready and not- ready time divided by the difference of active and not-ready time.
% Other State Time	The percentage of the agent's time spent in a state other than those listed in the report.
% Ready Time	The percentage of time within the interval that this agent's state was Ready, relative to the total duration within the interval of the agent's active session on a particular media channel.
% Not Ready Time	The percentage of time within the interval that this agent's state was NotReady, relative to the total duration within the interval of the agent's active session on a particular media channel.
% Wrap Time	The percentage of time that this agent spent in ACW (Wrap) state within the interval, relative to the total duration of the agent's active session within the interval.
% Busy Time	The percentage of time of all interaction-processing activities.

To view more detailed information about the metrics and attributes in this dashboard, and other metrics and attributes that can be used to customize reports, see the *Genesys CX Insights Projects Reference Guide*.

# Weekly Business Attribute Dashboard

The (**Dashboards** and **Business Results** folders) Weekly Business Attribute Dashboard provides detailed information and visualizations illustrating how interactions that enter the contact center are categorized into the business-result attributes that are configured in your environment.



Weekly Business Attribute Dashboard

### Understanding the Weekly Business Attribute Dashboard

The Weekly Business Attribute Dashboard has a tab for each tenant, which is further subdivided into two tabs:

- **Agent-Specific KPIs** tab Visualizations of the weekly volume of interactions agents accepted, average handle time, and the percentage of interactions that were transferred. Use the Business Result list to quickly focus the visualization on one result.
- Queue-Specific KPIs tab Visualizations of the weekly values representing critical queue KPIs: Entered with Objective, ASA, First Response Time, and Abandoned Waiting. Use the Business Result list to quickly focus the visualization on one result.

If the business-result classification changes during an interaction, Genesys Info Mart attributes the business result that is in effect when interaction handling ends to the business result that is attached to the interaction. More accurately, the business result that is associated with the interaction at the end of the segment with the first handling resource is attached to the interaction.

To get a better idea of what this dashboard looks like, view sample output from the dashboard:

SampleWeekly Business Attribute Dashboard .pdf

Link to video

The following tables explain the prompts you can select when you generate the dashboard, and the metrics and attributes that are represented in the dashboard:

### Prompts available the Weekly Business Attribute Dashboard

The following table lists prompts available for the Weekly Business Attribute Dashboard:

Prompt	Description
Pre-set Date Filter	From the convenient list of predefined dates, choose a date for which to run the report.
Start Date	Choose the first day from which to gather data into the dashboard.
End Date	Choose the last day from which to gather data into the dashboard.
Business Result	Optionally, select one or more business results on which to focus the report.
Customer Segment	Optionally, select one or more customer segments on which to focus the report.
Service Type	Optionally, select one or more service types on which to focus the report.
Media Type	Optionally, select one or more media types to include in the report—for example, VOICE, EMAIL, and CHAT.
Interaction Type	Optionally, select the type of interaction to include in the report—for example, Inbound, Outbound, and Internal.
Tenant	For multi-tenant environments, optionally select one or more tenants on which to focus the report.

### Attributes used on the Weekly Business Attribute Dashboard

The following table lists attributes used on the Weekly Business Attribute Dashboard:

Attribute	Description
Business Result	Click values in this column to focus the report on specific business results.
Week	Enables data within the reporting interval to be organized by a particular week (1-53).

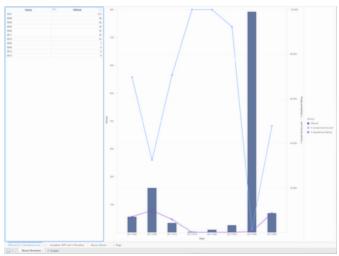
### Metrics used on the Weekly Business Attribute Dashboard

The following table lists metrics used on the Weekly Business Attribute Dashboard:

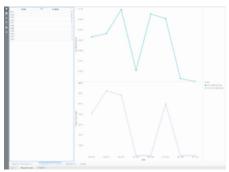
Metric	Description
Accepted	The total number of customer interactions of this business attribute that were accepted, answered, pulled, or initiated by a handling resource.
Avg Handle Time (Fmt)	The average amount of time (HH:MM:SS) that agents spent handling interactions assigned this business attribute.
% Transfer Initiated Agent	The percentage of customer interactions of this business attribute that agents transferred.
	Both warm and blind transfers are reflected in this metric.
Entered With Objective	The total number of customer interactions that entered or began within the contact center, were assigned this business attribute, and either had a baseline service objective or a <b>response threshold</b> (defined in the <b>[agg-gim-thld-QUEUE-IXN]</b> section) that was greater than zero.
ASA (Fmt)	The average amount of time (HH:MM:SS) it took agents to accept, answer, or pull customer interactions assigned this business attribute.
	This metric is identical to BA Customer\Avg Accept Time Agent.
% First Response Time Service Level	The service level that is delivered for this business attribute, measured as a percentage of customer interactions that were accepted within a user-defined threshold, relative to all customer interactions that were offered to handling resources.
% Abandoned Waiting	The percentage of customer interactions of this business attribute that were abandoned, relative to the total number of customer interactions of this business attribute that entered or began within the contact center during the interval.

To view more detailed information about the metrics and attributes in this dashboard, and other metrics and attributes that can be used to customize reports, see the *Genesys CX Insights Projects Reference Guide*.

# Weekly Queue Summary Dashboard



Weekly Queue Summary Dashboard: Offered Vs % Abandoned and % SL



Weekly Queue Summary Dashboard: Accepted, AHT, and % Transfers



Weekly Queue Summary Dashboard: Queue Volume

The (**Dashboards** and **Queues** folders) Weekly Queue Summary Dashboard provides visualizations you can use to assess the weekly performance of

configured queues, to understand what percentage of interactions in each queue were accepted within the defined service level, to detect high rates of abandonment, and to compare the performance of each queue in handling interactions.

### Understanding the Weekly Queue Summary Dashboard

The Weekly Queue Summary Dashboard presents queue information on three tabs:

- Offered Vs % Abandoned and % SL Use this combination line / bar graph to compare the number of interactions offered in a queue against the percentage that are either abandoned, or distributed and handled within the defined Service Level Threshold. Hover over the line graph to see details about the % Accept Service Level data for each week, or over the bar graph to see details about the volume of calls offered in that week.
- Accepted, AHT, and % Transfers Use these line graphs to contrast the Average Handle Time (AHT) and % Transfer Initiated Agent against the call volume in each configured queue. Hover over the line graph to see details about the Avg Handle Time or % Transfer Initiated Agent for each week,
- **Queue Volume** Use this heat map to explore the relative call volume for each queue. Each square shows values for key metrics hover over the square to see the metric names.

To get a better idea of what this dashboard looks like, view sample output from the dashboard:

#### SampleWeekly Queue Summary Dashboard.pdf

#### Link to video

The following tables explain the prompts you can select when you generate the dashboard, and the metrics and attributes that are represented in the dashboard:

### Prompts available for the Weekly Queue Summary Dashboard

The following table lists the prompts available for the Weekly Queue Summary Dashboard:

Prompt	Description
Pre-set Date Filter	From the convenient list of predefined dates, choose a date for which to run the report.
Start Date	Choose the first day from which to gather data into the dashboard.
End Date	Choose the last day from which to gather data into the dashboard.
Queue Group	Optionally, select one or more queue groups on which to focus the report.
Queue	Optionally, select one or more queues on which to focus the report.

Prompt	Description
Media Type	Optionally, select one or more media types to include in the report—for example, VOICE, EMAIL, and CHAT.
Interaction Type	Optionally, select the type of interaction to include in the report—for example, Inbound, Outbound, and Internal.
Tenant	For multi-tenant environments, optionally select one or more tenants on which to focus the report.

### Attributes used on the Weekly Queue Summary Dashboard

The following table lists the attributes used on the Weekly Queue Summary Dashboard

Attribute	Description
Queue	From the list, optionally select a value to focus on a specific ACD queue, virtual queue, interaction queue, or workbin.
Week	Enables data within the reporting interval to be organized by a particular week (1-53).

### Metrics used on the Weekly Queue Summary Dashboard

The following table lists the metrics used on the Weekly Queue Summary Dashboard:

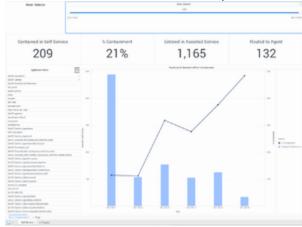
Metric	Description
% Abandoned Waiting	The percentage of customer interactions that both entered this queue and were subsequently abandoned before the interactions could be distributed, relative to the total number of interactions that entered this queue.
% Accept Service Level	The service level of this queue measured as a percentage of interactions that entered this queue and were accepted within the acceptance threshold, relative to all interactions that entered this queue and were offered to a resource.  This metric yields results other than 0 only for interactions that were accepted by an agent. This metric relies on the value of the acceptance threshold as configured in the [agg-gim-thid-QUEUE-IXN] section.
% Transfer Initiated Agent	The percentage of customer interactions that entered this queue, were distributed, were accepted, and subsequently were transferred (warm or blind) by agents, relative to the total number of interactions that entered this queue and

Metric	Description
	were distributed and accepted by agents.
Accepted	The total number of times that customer interactions and warm consultations that were distributed from this queue, were accepted, answered, or pulled by an agent, voice-treatment port, IVR port, or nonagent-associated DN (such as contact center resources that can alert).
Avg Accept Time (Fmt)	The average amount of time (HH:MM:SS) that customers waited before their interactions—distributed from this queue—were accepted by a handling resource.
Avg Handle Time (Fmt)	The average amount of time (HH:MM:SS) that agents spent handling customer interactions or warm consultations that were distributed or pulled from this queue.
Offered	The total number of interactions that entered this queue and were subsequently offered to a resource.  The count excludes short-abandoned interactions and includes handling attempts that agents rejected, as well as warm consultations, conferences, and collaborations that agents received. This metric relies on the value of the short-abandoned threshold as configured in the [agg-gim-thld-QUEUE-IXN] section.
Transfer Initiated Agent	The total number of times that agents transferred customer interactions that were distributed or pulled from this queue.

To view more detailed information about the metrics and attributes in this dashboard, and other metrics and attributes that can be used to customize reports, see the *Genesys CX Insights Projects Reference Guide*.

# Weekly Self Service Containment Dashboard

The (**Dashboards** and **Designer** folders) Weekly Self Service Containment Dashboard provides detailed information and visualizations that you can use to learn about the number and percentage of interactions that enter each Designer Application and conclude in the Self-Service phase, compared to the number that enter the Assisted-Service phase and are routed to a DN or agent.



Weekly Self Service Containment Dashboard

### Understanding the Weekly Self Service Containment Dashboard

The Weekly Self Service Containment Dashboard provides an interactive weekly view of self-service and assisted-service statistics. Use the **Week Selector** slider to easily focus on one or more weeks — as indicated by week number, where W1 is the first week of the year, W10 is the tenth week of the year, and so on. To get a better idea of what this dashboard looks like, view sample output from the dashboard:

SampleWeekly Self Service Containment Dashboard .pdf

#### Link to video

The following tables explain the prompts you can select when you generate the dashboard, and the metrics and attributes that are represented in the dashboard:

Prompts available for the Weekly Self Service Containment

#### Dashboard

The following table explains the prompts available for the Weekly Self Service Containment Dashboard:

Prompt	Description
Pre-set Date Filter	From the convenient list of predefined dates, choose a date range for which to run the report. This option has no effect if you specify a Start Date and End Date.
Start Date	Choose the first day from which to gather data into the dashboard.
End Date	Choose the last day from which to gather data into the dashboard.
Application	Optionally, choose one or more applications on which to focus the reprot.

# Attributes used on the Weekly Self Service Containment Dashboard

The following table explains the attributes used on the Weekly Self Service Containment Dashboard:

Attribute	Description
Application Name	Enables organization of data based on Designer application. Optionally make a selection in the list, to focus the report on a given application.
Week	Enables organization of data by week. Drag the Week Selector control handles to change the focus of the report.

### Metrics used on the Weekly Self Service Containment Dashboard

The following table explains the metrics used on the Weekly Self Service Containment Dashboard:

Metric	Description	Source Table.Column or Calculation
Contained in Self- Service	The total number of interactions that entered the Designer application in Self-Service and were concluded without entering Assisted-Service.	
% Containment	The percentage of interactions that entered the Designer	

Metric	Description	Source Table.Column or Calculation
	application in Self-Service and were concluded without entering Assisted-Service.	
Entered in Assisted Service	The total number of interactions that entered the Designer application in Assisted-Service.	
Routed to Agent	The total number of interactions that entered the Self-Service phase of the Designer application and were later routed to an agent.	
Entered in Self- Service	The total number of interactions that entered the Designer application in Self-Service.	

To view more detailed information about the metrics and attributes in this dashboard, and other metrics and attributes that can be used to customize reports, see the *Genesys CX Insights Projects Reference Guide*.

### Designer reports

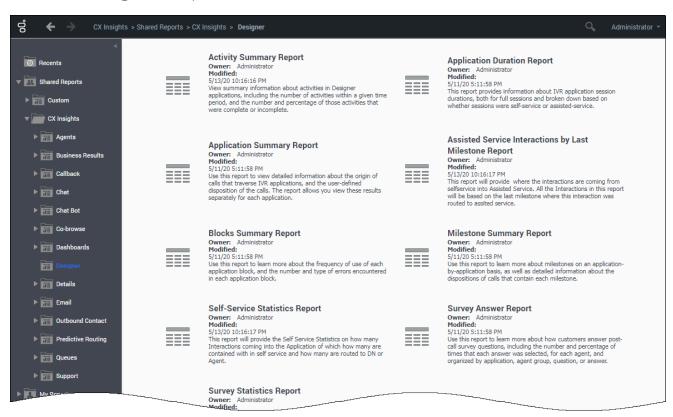
This page describes reports and dashboards you can use to view information about Interactive-Voice-Response (IVR) usage in your contact center. IVR Reports are created using Genesys Designer. Reports in the **Designer** folder are ready-to-use, but as always, can be modified to suit your specific business needs.

Reports in this folder require that specific RAA options be enabled: enable-sdr, and in some cases enable-sdr-survey. For more information, see the *Genesys CX Insights Deployment Guide*.

#### **Important**

Reports in the Designer folder are supported for Genesys Engage cloud deployments only.

#### About Designer reports



#### The following reports are available in the **CX Insights** > **Designer** folder:

- Activity Summary Report
- Application Duration Report
- Application Summary Report
- Assisted Service Interactions by Last Milestone Report
- Blocks Summary Report
- Bot Analytical Dashboard
- Final Disposition Dashboard
- Milestone Summary Report
- Self-Service Statistics Report
- Survey Answer Report
- Survey Statistics Report
- Weekly Self Service Containment Dashboard

#### **Related Topics**:

- Go back to the complete list of available reports.
- Learn how to understand and use reports.
- · Learn how to create or customize reports.

## Activity Summary Report

Use the (**Designer** folder) Activity Summary Report to view summary information about activities in Designer applications, including the number of activities within a given time period, and the number and percentage of those activities that were complete or incomplete.

#### Understanding the Activity Summary Report

Activity Summary Report							
Activity	Day	Avg Activity Duration (Fmt)	Activities	Completed	Incomplete	% Completed	% Incomplete
	2017-09-11	00:00:00	5	0	5	0.00%	100.00%
act4_NoStop	2017-09-13	00:00:00	6	0	6	0.00%	100.00%
	2017-09-18	00:00:00	2	0	2	0.00%	100.00%
	2017-09-11	00:00:00	20	0	20	0.00%	100.00%
act5_falseParent	2017-09-13	00:00:00	18	0	18	0.00%	100.009
	2017-09-18	00:00:00	6	0	6	0.00%	100.00%
	2017-09-11	00:00:00	10	0	10	0.00%	100.00%
actAS_seg1	2017-09-13	00:00:00	6	0	6	0.00%	100.00%
	2017-09-18	00:00:00	2	0	2	0.00%	100.00%
	2017-09-11	00:00:01	10	10	0	100.00%	0.00%
actAS1	2017-09-13	00:00:02	9	9	0	100.00%	0.00%
	2017-09-18	00:00:02	3	3	0	100.00%	0.009
	2017-09-11	00:00:00	5	5	0	100.00%	0.009
activityTwist1	2017-09-13	00:00:00	6	6	0	100.00%	0.00%
	2017-09-18	00:00:00	2	2	0	100.00%	0.00%
	2017-09-11	00:00:00	5	5	0	100.00%	0.00
ActivityTwist2	2017-09-13	00:00:00	6	6	0	100.00%	0.00
	2017-09-18	00:00:00	2	2	0	100.00%	0.00
	2017-09-11	00:00:02	5	5	0	100.00%	0.00
actMenuOpt1	2017-09-13	00:00:02	3	3	0	100.00%	0.009
	2017-09-18	00:00:02	1	1	0	100.00%	0.00
	2017-09-11	00:00:03	5	5	0	100.00%	0.00
actMenuOpt2	2017-09-13	00:00:03	3	3	0	100.00%	0.00
	2017-09-18	00:00:03	1	1	0	100.00%	0.00
	2017-09-11	00:00:02	5	5	0	100.00%	0.00
ActMod	2017-09-13	00:00:03	6	6	0	100.00%	0.00
	2017-09-18	00:00:03	2	2	0	100.00%	0.00
	2017-09-11	00:00:02	10	10	0	100.00%	0.00
actSegMenu	2017-09-13	00:00:02	6	6	0	100.00%	0.00
	2017-09-18	00:00:02	2	2	0	100.00%	0.00
	2017-09-11			-	10	66.67%	33.33

This report provides information about Designer activities.

An activity is a task that you've defined in an application as a series of steps with a starting point and stopping point. For example, you might set up an activity for making a payment that starts with the caller being asked for their credit card details and then ends with the system sending those details to a payment processor and receiving the approval.

Each activity has a start and end point, and can be complete or incomplete, with success or failure.

To get a better idea of what this report looks like, view sample output from the report: SampleActivitySummaryReport.pdf

The following tables explain the prompts you can select when you generate the report, and the metrics and attributes that are represented in the report:

### Prompts for the Activity Summary Report

Prompt	Description
Pre-set Date Filter	From the list, choose a time period on which to report, and move it to the Selected list.
Start Date	Choose the first day from which to gather data into the report.
End Date	Choose the last day from which to gather data into the report.
Application	Choose the applications on which to report. By default, the report includes all applications; if you add any applications to the <b>Selected</b> list, then only those applications are included.
Activity	Choose the activities on which to report. By default, the report includes all activities.

### Attributes used in the Activity Summary Report

Attribute	Description
Activity	This attribute enables data within the reporting interval to be organized by the name of the activity.
Day	This attribute enables data within the reporting interval to be organized by a particular day.

#### Metrics used in the Activity Summary Report

Metric	Description	Source Table.Column or Calculation
Avg Activity Duration (Fmt)	The average amount of time	Calculated based on the values

Metric	Description	Source Table.Column or Calculation
	attributed to each activity.	of the Designer > Session > Session Duration and Activities metrics.
Activities	The total number of activities that began during the reporting interval.	AGT_SDR_ACTIVITY_*.ACTIVITIES
Completed	The total number of activities that were completed during the reporting interval.	AGT_SDR_ACTIVITY_*.COMPLETED
Incomplete	The total number of activities that started during the reporting interval, but were not completed.	Calculated as the difference between the value of the Activities metric, and the Completed metric.
% Completed	The percentage of activities that were completed during the reporting interval.	Calculated based on the values of the Activities metric, and the Completed metric.
% Incomplete	The percentage of activities that were incomplete at the end of the reporting interval.	Calculated based on the values of the Activities metric, and the Incomplete metric.

## Application Duration Report

This page describes how you can use the (IVR folder) Application Duration Report to learn more about IVR service time durations.

### Understanding the Application Duration Report

		Application	n Duration	Report				
Application Name	Day	Assisted Service Duration (Fmt)	Self-Service Duration (Fmt)	Session Duration (Fmt)	Avg Assisted Service Duration (Fmt)	Avg Self- Service Duration (Fmt)	Avg Session Duration (Fmt)	Session
Andrey	2017-03-10	00:03:28	00:00:00	00:03:48	00:00:52	00:00:00	00:00:57	4
Anuley	Total	00:03:28	00:00:00	00:03:48	00:00:52	00:00:00	00:00:57	4
	2017-03-06	03:25:41	00:00:48	03:33:29	00:02:36	00:00:01	00:02:42	79
	2017-03-07	00:25:51	00:00:02	00:27:37	00:01:22	00:00:00	00:01:27	19
A	2017-03-09	00:11:30	00:00:01	00:12:14	00:01:26	00:00:00	00:01:32	8
Automation_test_1	2017-03-10	02:58:07	00:00:19	03:05:38	00:02:10	00:00:00	00:02:16	82
	2017-03-13	00:03:55	00:00:00	00:04:00	00:03:55	00:00:00	00:04:00	1
	Total	07:05:04	00:01:10	07:22:58	00:02:15	00:00:00	00:02:21	189
	2017-03-06	00:09:06	00:00:00	00:09:48	00:01:08	00:00:00	00:01:14	8
	2017-03-07	00:02:40	00:00:00	00:02:45	00:02:40	00:00:00	00:02:45	1
	2017-03-08	00:10:40	00:00:00	00:11:00	00:02:40	00:00:00	00:02:45	4
-	2017-03-09	00:13:16	00:00:00	00:14:44	00:00:47	00:00:00	00:00:52	17
Bev	2017-03-10	00:02:46	00:00:00	00:02:57	00:01:23	00:00:00	00:01:29	2
	2017-03-13	00:06:15	00:00:00	00:06:32	00:02:05	00:00:00	00:02:11	3
	2017-03-14	03:05:01	00:00:00	03:05:42	00:23:08	00:00:00	00:23:13	8
	Total	03:49:44	00:00:00	03:53:28	00:05:21	00:00:00	00:05:26	43
	2017-03-08	00:00:00	00:00:00	00:00:00	00:00:00	00:00:00	00:00:00	2
Chat Consult Strategy	Total	00:00:00	00:00:00	00:00:00	00:00:00	00:00:00	00:00:00	2
	2017-03-07	00:01:11	00:02:55	00:07:19	00:00:02	00:00:06	00:00:15	30
Cyara_Assign_S	2017-03-13	00:01:10	00:03:27	00:07:50	00:00:02	00:00:07	00:00:16	30
	Total	00:02:21	00:06:22	00:15:09	00:00:02	00:00:06	00:00:15	60
	2017-03-07	00:00:17	00:00:12	00:00:48	00:00:06	00:00:04	00:00:16	3
cyara_BC_EF_results	2017-03-13	00:00:12	00:00:06	00:00:38	00:00:04	00:00:02	00:00:13	3
	Total	00:00:29	00:00:18	00:01:26	00:00:05	00:00:03	00:00:14	6
	2017-03-07	00:00:27	00:00:12	00:01:05	00:00:07	00:00:03	00:00:16	
cyara_BC_SD_Holidays	2017-03-13	00:00:16	00:00:39	00:01:14	00:00:05	00:00:13	00:00:25	:
-,	Total	00:00:43	00:00:51	00:02:19	00:00:06	00:00:07	00:00:20	7
	2017-03-07	00:00:04	00:00:00	00:00:16	00:00:02	00:00:00	00:00:08	
Ovara_BusinessHours_AlaskaTime_AS	2017-03-13	00:00:04	00:00:00	00:00:16	00:00:02	00:00:00	00:00:08	
	Total	00:00:08	00:00:00		00:00:02	00:00:00	00:00:08	

This report provides information about IVR application session durations, either for full sessions, or broken down based on whether sessions were self-service or assisted-service.

To get a better idea of what this report looks like, view sample output from the report: SampleApplicationDurationReport.pdf

The following tables explain the prompts you can select when you generate the report, and the metrics and attributes that are represented in the report:

### Prompts for the Application Duration Report

Prompt	Description
Pre-set Date Filter	From the list, choose a time period on which to report, and move it to the Selected list.
Start Date	Choose the first day from which to gather data into the report.
End Date	Choose the last day from which to gather data into the report.
Application	Choose the applications on which to report. By default, the report includes all applications; if you add any applications to the <b>Selected</b> list, then only those applications are included.

### Attributes used in the Application Duration Report

Attribute	Description			
Application Name	This attribute enables data to be organized by the name of the self-service and/or assisted-service application (created using Designer).			
Day	This attribute enables data within the reporting interval to be organized by a particular day.			

### Metrics used in the Application Duration Report

Metric	Description
Assisted Service Duration (Fmt)	The total amount of time attributed to the Assisted-Service phase of the Designer application.
Self-Service Duration (Fmt)	The total amount of time attributed to the Self-Service phase of the Designer application.
Session Duration (Fmt)	The total amount of time attributed to either the Self-Service phase or the Assisted-Service phase of the Designer application.

Metric	Description
Avg Assisted Service Duration (Fmt)	The average amount of time that callers spent in the Assisted-Service phase of the Designer application.
Avg Self-Service Duration (Fmt)	The average amount of time that callers spent in the Self-Service phase of the Designer application.
Avg Session Duration (Fmt)	The average amount of time attributed to either the Self-Service phase or the Assisted-Service phase of the Designer application.
Session	The total number of times that a caller interacted with the application.

## Application Summary Report

This page describes how you can use the (**IVR** folder) Application Summary Report to learn more about the disposition of Interactive Voice Response (IVR) sessions.

### Understanding the Application Summary Report

Application Summary Report					
Final Disposition	Application Name	Day	Session		
		2017-03-10	18		
	GimReporting	2017-03-14	18		
Abandoned in Queue		Total	36		
	Total		36		
		2017-03-07	1		
	Cyara_ExitQueue_Treatmentactivity	2017-03-13	1		
Abandoned in Queue		Total	2		
	Total		2		
		2017-03-10	4		
	GimReporting	2017-03-14	4		
		Total	8		
Abandoned in Self Service		2017-03-08	3		
	id	Total	3		
	Total		11		
		7.03-06			

This report provides detailed information about the origin of calls that traverse IVR applications, and the user-defined disposition of the calls. The report allows you view these results separately for each

application, for time ranges that you specify.

To get a better idea of what this report looks like, view sample output from the report: SampleApplicationSummaryReport.pdf

The following tables explain the prompts you can select when you generate the report, and the metrics and attributes that are represented in the report:

### Prompts for the Application Summary Report

Prompt	Description
Pre-set Date Filter	From the list, choose a time period on which to report, and move it to the Selected list.
Start Date	Choose the first day from which to gather data into the report.
End Date	Choose the last day from which to gather data into the report.
User Disposition	Filter the interactions included in the report based on whether the status when the caller exited the call flow was set by the agent (User Disposition) or by the system (Final Disposition).
Application	Choose the applications to include in the report. By default, the report includes all applications. If you add any applications to the <b>Selected</b> list, then only those applications are included.

### Attributes used in the Application Summary Report

Attribute	Description
Application Name	This attribute enables data to be organized by the name of the self-service and/or assisted-service application (created using Designer).
Day	This attribute enables data within the reporting interval to be organized by a particular day within a month and year. Day values are presented in YYYY-MM-DD format.
Final Disposition	This attribute enables data to be organized by the status assigned to a call when the caller exited the call flow (such as Abandoned in Self-service, Abandoned in Queue, Routed to Agent, System Error, Terminated, or Other). This status is set by the system. The report includes either Final Disposition or User Disposition, or neither, but not both.
User Disposition	This attribute enables data to be organized by the

Attribute	Description
	status assigned to a call when the caller exited the call flow. This status is set by the agent. The report includes either Final Disposition or User Disposition, or neither, but not both.

### Metrics used in the Application Summary Report

Metric	Description
Session	The total number of sessions attributed to User Disposition or Final Disposition.

# Assisted Service Interactions by Last Milestone Report

Use the (**Designer** folder >) Assisted Service Interactions by Last Milestone Report to learn more about calls that move from Self Service into Assisted Service. Interactions are included in this report based on the last milestone where the interaction was routed to assisted service.

# Understanding the Assisted Service Interactions by Last Milestone Report

Assi	sted Service In	teractions by La	st Milestone	Repor	t		
Application Name		Last Milestone	Day	Session	Avg Session Duration (Fmt)	Session Duration (Fmt)	Transferred to Assisted Servic (Fmt)
			2017-09-13	214	00:00:00	00:00:52	00:00:
	NO_VALUE	NO_VALUE	2017-09-14	19	00:00:00	00:00:08	00:00:
unother Check			Total	233	00:00:00	00:01:00	00:00:
	Total			233	00:00:00	00:01:00	00:00
			2017-09-12	30	00:00:01	00:00:33	00:00
	NO_VALUE	NO_VALUE	2017-09-15	6	00:00:10	00:01:01	00:00
That Health Test			Total	36	00:00:03	00:01:34	00:00
	Total			36	00:00:03	00:01:34	00:00
			2017-09-12	1	00:00:12	00:00:12	00:00
yara_BH_Result_true	NO_VALUE	NO_VALUE	Total	1	00:00:12	00:00:12	00:00
	Total			1	00:00:12	00:00:12	00:00:
Cyara_CustomService			2017-09-12	2	00:00:09	00:00:17	00:00
	NO_VALUE	NO_VALUE	Total	2	00:00:09	00:00:17	00:00
	Total	Total		2	00:00:09	00:00:17	00:00
			2017-09-12	2	00:00:36	00:01:12	00:00
yara_HTTPRest_509Errorcode	NO_VALUE	NO_VALUE	Total	2	00:00:36	00:01:12	00:00
	Total			2	00:00:36	00:01:12	00:00
			2017-09-12	2	00:00:08	00:00:15	00:00
yara_HTTPRest_JSONPayload	NO_VALUE	NO_VALUE	Total	2	00:00:08	00:00:15	00:00
	Total			2	00:00:08	00:00:15	00:00
		NO_VALUE	2017-09-12	2	00:00:10	00:00:20	00:00
Yara_HTTPRest_KVPair	NO_VALUE		Total	2	00:00:10	00:00:20	00:00
	Total			2	00:00:10	00:00:20	00:00
		NO_VALUE	2017-09-12	1	00:00:18	00:00:18	00:00
Yara HTTPRest Multipleresponseheaders ASPhase	NO_VALUE		Total	1	00:00:18	00:00:18	00:00
	Total			1	00:00:18	00:00:18	00:00
			2017-09-12	1	00:00:18	00:00:18	00:00
yara HTTPRest Multipleresponseheaders SSPhase	NO_VALUE	NO_VALUE	Total	1	00:00:18	00:00:18	00:00
; <u>-</u>	Total			1	00:00:18	00:00:18	00:00
			2017-09-12	1	00:00:13	00:00:13	00:00
yara_HTTPRest_OutputParams_GET	NO_VALUE	NO_VALUE	Total	1	00:00:13	00:00:13	00:00
Lydia_nifrest_outputPdrams_dsf	Total		2002	1	00:00:13	00:00:13	00:00
	20002		2017-09-12	1	00:00:13	00:00:13	00:00
Trans UTTDDagt Outruit Darame DOCT	NO_VALUE	NO_VALUE	Total	1	00:00:13	00:00:13	00:00
Cyara_HTTPRest_OutputParams_POST	Total		10041	1	00:00:13	00:00:13	00:00

This report provides information what milestone interactions passed through before entering Assisted Service.

A milestone is a custom benchmark (or checkpoint) that you've defined in an application to indicate that a significant point in the application flow was reached. For example, you might set up a milestone to mark when callers have made a successful payment, and another for when they've agreed to certain terms and conditions.

To get a better idea of what this report looks like, view sample output from the report: SampleAssistedServiceInteractionsbyLastMilestoneReport.pdf

The following tables explain the prompts you can select when you generate the report, and the metrics and attributes that are represented in the report:

### Prompts for the Assisted Service Interactions by Last Milestone Report

Prompt	Description
Pre-set Date Filter	From the list, choose a time period on which to report, and move it to the Selected list.
Start Date	Choose the first day from which to gather data into the report.
End Date	Choose the last day from which to gather data into the report.
Application	Choose the applications on which to report. By default, the report includes all applications; if you add any applications to the <b>Selected</b> list, then only those applications are included.

# Attributes used in the Assisted Service Interactions by Last Milestone Report

Attribute	Description
Application Name	This attribute enables data within the reporting interval to be organized by the name of the Self-Service and/or Assisted-Service Designer application.
Last Milestone	This attribute enables data within the reporting interval to be organized by the name of the last milestone the call passed before enter Assisted Service.
Day	This attribute enables data within the reporting interval to be organized by a particular day.

### Metrics used in the Assisted Service Interactions by Last Milestone Report

Metric	Description	Source Table.Column or Calculation
Session	The total number of interactions that entered the Designer application during the reporting interval.	AGT_SDR_SESSION_*.CALLS
Avg Session Duration (Fmt)	The average amount of time that callers spent in the Assisted-Service phase of the Designer application.	Calculated based on the value of the Session Duration metric and the Session metric.
Session Duration (Fmt)	The total amount of time that all callers spent in the Assisted-Service phase of the Designer application.	AGT_SDR_SESSION_*.AS_DURATION
Transferred to Assisted Service (Fmt)	The total number of interactions that were transferred from the Self-Service phase of the Assisted-Service phase of the Designer application during the reporting interval.	AGT_SDR_SESSION_*.AS_TRANSFER

### Blocks Summary Report

This page describes how you can use the (**IVR** folder) Blocks Summary Report to learn more about traffic and errors in each application block.

### Understanding the Blocks Summary Report

		Blocks Sur	nmary R	eport				
Day	Block	Strikeout	Blocks	No Input Error	No Match Error	Avg No Input Error	Avg No Match Error	Avg Blo Duratio (Fmt)
	AM PM Menu	0	6	6	6	1.00	1.00	00:00
	Ask Retry or Return	0	1	1	1	1.00	1.00	00:00
	Child Menu	4	9	9	9	1.00	1.00	00:00
	Collect Phone Number	28	53	53	53	1.00	1.00	00:00
	Confirm Number Menu	2	7	7	7	1.00	1.00	00:00
	Confirm Phone Number	2	108	108	108	1.00	1.00	00:00
	Confirm Time Slot Selected	0	10	10	10	1.00	1.00	00:00
	Description of callback	1	1	1	1	1.00	1.00	00:00
	Existing Callback Menu	2	12	12	12	1.00	1.00	00:00
	Get Day of Week	0	18	18	18	1.00	1.00	00:00
	Get Time	1	17	17	17	1.00	1.00	00:00
	Hail Caller Menu	18	71	71	71	1.00	1.00	00:00
	main Menu	3	9	a	9	1.00	1.00	00:00

This report provides information about the frequency of use of each application block, and the number and type of errors encountered in each application block.

To get a better idea of what this report looks like, view sample output from the report: SampleBlocksSummaryReport.pdf

The following tables explain the prompts you can select when you generate the report, and the metrics and attributes that are represented in the report:

### Prompts for the Blocks Summary Report

Prompt	Description
Pre-set Date Filter	From the list, choose a time period on which to report.
Start Date	Choose the first day from which to gather data into the report.
End Date	Choose the last day from which to gather data into the report.
Application	Choose the applications to include in the report. By default, the report includes all applications. If you add any applications to the <b>Selected</b> list, then only those applications are included.

### Attributes used in the Blocks Summary Report

Attribute	Description
Day	This attribute enables data to be organized by the day.
Block	This attribute enables data to be organized by application block.

### Metrics used in the Blocks Summary Report

Metric	Description
Strikeout	The total number of times that the maximum number of retries was reached.
Blocks	The total number of hits to a given block. A session can hit a block more than once.
No Input Error	The total number of times that a No Input error was encountered in each block.
No Match Error	The total number of times that a No Match error was encountered in each block.
Avg No Input Error	The average number of No Input errors encountered in each block.
Avg No Match Error	The average number of No Match errors encountered in each block.
Avg Block Duration (Fmt)	The average amount of time spent in each block (HH:MM:SS).

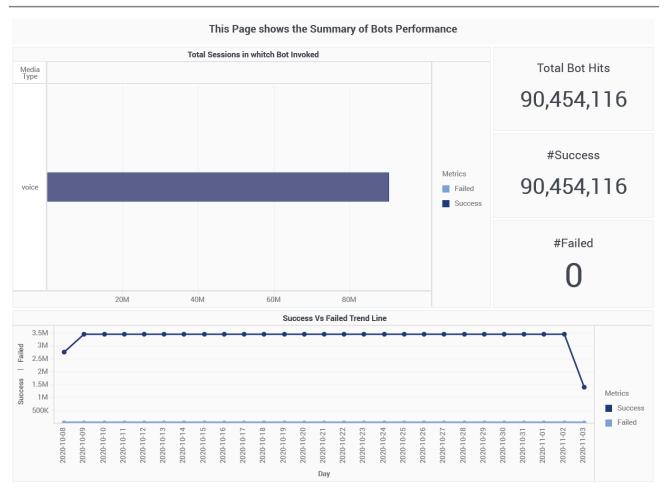
## Bot Analytical Dashboard

This page describes how you can use the (**Dashboards** > and **Designer** > folder) Bot Analytical Dashboard to learn more about bot activity, and how bots can help you improve customer experience with Genesys Designer.

Note that the term *dashboard* is used interchangeably with the term *dossier*. Dashboards / dossiers provide an interactive, intuitive data visualization, summarizing Key Performance Indicators (KPIs). You can change how you view the data in most reports and dashboards by using interactive features such as selectors, grouping, widgets, and visualizations. You can explore data through multiple paths, using text and data filtering, and layers of organization.

#### Understanding the Bot Analytical Dashboard

Bot Analytical Dashboard Bot Invoked - Bot Invoked - Overview



This dashboard provides detailed reporting on bot activity during interaction flows that involve Genesys Designer applications, and contrasts self-service sessions with and without bot participation, which can help you understand how bots impact the customer experience.

The Bot Analytical Dashboard is divided into three tabs:

- **Self-Service with/without Bot** tab Contrasts self-service customer experience when bots are present / absent from the interaction.
- Bot Invoked tab Provides information about total bot hits, and summarizes bot invokation success/ failure rates.
- **Intent per Bot** tab Analyzes interaction progress and outcomes, in the context of bot participation. During its conversation with a customer, the bot attempts to identify the intent, or what it is that the customer wants to do. For example, the bot might detect that the customer wants to buy a ticket. It then proceeds to fill the required slots (or *entities*) that are associated with that intent, such as the name of the show the customer wants to buy a ticket for, the date and time they want to attend, and so on, by asking the customer to provide those details.

To get a better idea of what this dashboard looks like, view sample output from the dashboard: SampleBotAnalyticalDashboard.pdf

The following tables explain the prompts you can select when you generate the dashboard, and the metrics that are represented in the dashboard:

### Prompts for the Bot Analytical Dashboard

Prompt	Description
Pre-set Date Filter	From the list, choose a time period on which to report, and move it to the <b>Selected</b> list.
Start Date	Choose the first day from which to gather report data.
End Date	Choose the last day from which to gather report data.
Application	Choose an application on which to focus the report.
Bot	Choose a bot on which to focus the report.
Media Type	Choose a media type on which to focus the report.
Tenant	Choose a tenant on which to focus the report.

### Attributes used in the Bot Analytical Dashboard

Attribute	Description
Application Name	This attribute enables data to be organized by application.
Day	This attribute enables data to be organized by day.
Hour	This attribute enables data to be organized by hour.
Intent (Intent per Bot tab only)	This attribute enables data to be organized based on customer intent.
Last Intent (Intent per Bot tab only)	This attribute enables data to be organized by the last identified customer intent.
Media Type	This attribute enables data to be organized by the type of media.
Provider Type	This attribute enables data to be organized by the type of provider.

### Metrics used in the Bot Analytical Dashboard

The Bot Analytical Dashboard is divided into three tabs:

- Self-Service with/without Bot
- Bot Invoked
- Intent per Bot

Metric	Description
Self-Service with/without Bot tab	
Avg Self Service Bot Duration	The average duration of Self-Service SDR sessions in which bots participated
Avg Self Service No Bot Duration	The average duration of Self-Service SDR session in which no bots participated.
Bots	The total number of SDR sessions in which Self-Service was used.
Entered Bot in Self Service	The total number of Self-Service SDR sessions in which a bot participated.
Entered in Self Service	The total number of SDR sessions in which Self-Service was used.
Entered No Bot in Self Service	The total number of Self-Service SDR sessions in which no bot participated.
Self-Service Bot Duration	The total duration (in seconds) of all Self-Service SDR sessions in which bots participated.
Self-Service Duration	The total duration (in seconds) of all Self-Service SDR sessions.
Self-Service No Bot Duration	The total duration (in seconds) of all Self-Service SDR sessions in which no bots participated.
Bot Invoked tab	
Bot Hits	The total number of bot sessions. If a bot is invoked more than once within an SDR session, it is counted more than once.
Failed	The total number of failed bot sessions. This indicates that there was a condition that triggered an error, such as Designer being unable to communicate with the bot.
Success	The total number of successful bot sessions. This indicates that Designer was able to invoke the bot. A conversation with the customer took place and the bot was able to successfully identify an intent.
Intent per Bot tab	
Abandoned in Queue	The total number of interactions that entered the Self-Service phase of the Designer application, requested Assisted-Service, and were subsequently abandoned while waiting in queue.
Abandoned in Self- Service	The total number of interactions that entered the

Metric	Description
	Designer application in Self-Service and were abandoned without entering Assisted-Service.
Avg Intent Duration	The average amount of time (in seconds) that elapsed for customer intents to be recognized.
Intent Duration	The total amount of time (in seconds) that elapsed for customer intents to be recognized.
Intent Hits	The total number of customer intents that were recognized. In SDR sessions where more than one intent is recognized, each one is counted.
Routed to Agent	The total number of interactions that entered the Self-Service phase of the Designer application and were later routed to an agent.
Routed to DN	The total number of interactions that entered the Self-Service phase of the Designer application and were later routed to a DN.

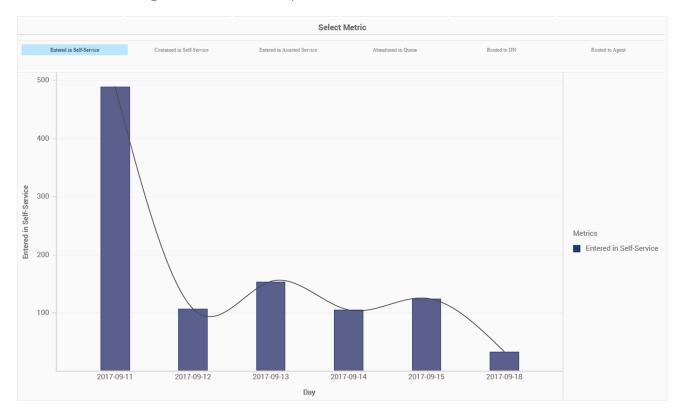
To view more detailed information about the metrics and attributes in this dashboard, and other metrics and attributes that can be used to customize reports, see the *Genesys CX Insights Projects Reference Guide*.

### Final Disposition Dashboard

This page describes how you can use the (**Dashboards** > and **Designer** > folder) Final Disposition Dashboard to analyze trends in interaction outcomes by viewing detailed information over time periods you specify, about the number and percentage of interactions that enter the Designer Application and conclude in the Self-Service phase, compared to the number that enter the Assisted-Service phase and are routed to a DN or agent.

Note that the term *dashboard* is used interchangeably with the term *dossier*. Dashboards / dossiers provide an interactive, intuitive data visualization, summarizing Key Performance Indicators (KPIs). You can change how you view the data in most reports and dashboards by using interactive features such as selectors, grouping, widgets, and visualizations. You can explore data through multiple paths, using text and data filtering, and layers of organization.

#### Understanding the Final Disposition Dashboard



This dashboard is designed to provide an overview of interaction outcomes by visualizing key KPIs over time, which can help you spot trends in customer outcomes.

Use this dashboard to compare today's numbers to previous days. By default, the dashboard shows

the past week, but you can run it across longer periods of time. In the **Select Metric** bar, choose which metric to view in the bar chart.

To get a better idea of what this dashboard looks like, view sample output from the dashboard: HRCXIFinalDispositionDashboard.pdf

The following tables explain the prompts you can select when you generate the dashboard, and the attributes and metrics that are represented in the dashboard:

### Prompts for the Final Disposition Dashboard

Prompt	Description
Pre-set Date Filter	From the list, choose a time period on which to report, and move it to the <b>Selected</b> list.
Start Date	Choose the first day from which to gather report data.
End Date	Choose the last day from which to gather report data.
Application	Choose an application on which to focus the report.

### Attributes used in the Final Disposition Dashboard

Attribute	Description
Application Name	This attribute enables data to be organized by application.
Day	This attribute enables data to be organized by day.
Hour	This attribute enables data to be organized by hour.
Month	This attribute enables data to be organized by month.
Week	This attribute enables data to be organized by week.
Subhour	This attribute enables data to be organized by 15 / 30 minutes intervals.

#### Metrics used in the Final Disposition Dashboard

Metric	Description
Abandoned in Queue	The total number of interactions that entered the Self-Service phase of the Designer application, requested Assisted-Service, and were subsequently

Metric	Description
	abandoned while waiting in queue.
Contained in Self- Service	The total number of interactions that entered the Designer application in Self-Service and were concluded without entering Assisted-Service.
Entered in Assisted Service	The total number of interactions that entered the Designer application in Assisted-Service.
Entered in Self- Service	The total number of interactions that entered the Designer application in Self-Service.
Routed to Agent	The total number of interactions that entered the Self-Service phase of the Designer application and were later routed to an agent.
Routed to DN	The total number of interactions that entered the Self-Service phase of the Designer application and were later routed to a DN.

To view more detailed information about the metrics and attributes in this dashboard, and other metrics and attributes that can be used to customize reports, see the *Genesys CX Insights Projects Reference Guide*.

### Milestone Summary Report

This page describes how you can use the (**IVR** folder) Milestone Summary Report to learn more about the dispositions of calls at each milestone.

### Understanding the Milestone Summary Report

		Mile	estone Summary Repo	ort	
Final Disposition	Application Name	Day	Milestone		Session
		DataEntered	DataEntered	3	
			Menu1 Option1	Menu1 reached/Menu1 Option1	3
		2017-03-10	Menu1 Option2	Menu1 reached/Menu1 Option2	3
		2017-03-10	Menu1 reached	Menu1 reached	3
			Menu2 Option2	Menu1 reached/Menu1 Option1/Menu2 reached/Menu2 Option2	3
			Menu2 reached	Menu1 reached/Menu1 Option1/Menu2 reached	3
Abandoned in Queue	GimReporting		DataEntered	DataEntered	3
Abandoned in Queue			Menu1 Option1	Menu1 reached/Menu1 Option1	3
		2017-03-14	Menu1 Option2	Menu1 reached/Menu1 Option2	3
		2017-03-14	Menu1 reached	Menu1 reached	3
			Menu2 Option2	Menu1 reached/Menu1 Option1/Menu2 reached/Menu2 Option2	3
			Menu2 reached	Menu1 reached/Menu1 Option1/Menu2 reached	3
		Total			36
	Total				36
		2017-03-07	МоН	МоН	1
Cyara_ExitQueue_Treatmentactivity Abandoned in Queue	2017-03-13	МоН	МоН	1	
	Total			2	
	Total				2
			Menu1 Option1	Menu1 reached/Menu1 Option1	1
			Marraman		

This report provides milestone information on an application-by-application basis, as well as detailed information about the dispositions of calls that contain each milestone.

To get a better idea of what this report looks like, view sample output from the report: SampleMilestoneSummaryReport.pdf

The following tables explain the prompts you can select when you generate the report, and the metrics and attributes that are represented in the report:

### Prompts for the Milestone Summary Report

Prompt	Description
Pre-set Date Filter	From the list, choose a time period on which to report, and move it to the Selected list.
Start Date	Choose the first day from which to gather data into the report.
End Date	Choose the last day from which to gather data into the report.
User Disposition	Filter the interactions included in the report based on whether the status when the caller exited the call flow was set by the agent (User Disposition) or by the system (Final Disposition).
Application	Choose the applications to include in the report. By default, the report includes all applications. If you add any applications to the <b>Selected</b> list, then only those applications are included.

### Attributes used in the Milestone Summary Report

Description
This attribute enables data to be organized by the status assigned to a call when the caller exited the call flow (such as Abandoned in Self-service, Abandoned in Queue, Routed to Agent, System Error, Terminated, or Other). This status is set by the system. The report includes either Final Disposition or User Disposition, or neither, but not both.
This attribute enables data to be organized by the name of the self-service and/or assisted-service application (created using Designer).
This attribute enables data within the reporting nterval to be organized by a particular day within a month and year. Day values are presented in YYYY-MM-DD format.
<ul> <li>This attribute enables data to be organized by user-defined milestones and milestone paths:</li> <li>The first column lists the milestones that the caller passed, including the last milestone.</li> <li>The second column shows the full path of each milestone passed.</li> </ul>
STATE TO THE TOTAL

### Metrics used in the Milestone Summary Report

Metric	Description
Session	The total number of sessions that encountered each milestone or milestone path.

### Self-Service Statistics Report

Use the (**Designer** folder >) Self-Service Statistics Report to learn about the number and percentage of interactions that enter the Designer Application and conclude in the Self-Service phase, compared to the number that enter the Assisted-Service phase and are routed to a DN or agent.

#### Understanding the Self-Service Statistics Report

Self-Service Statistics Report							
Application Name	Day	Entered in Self-Service	Contained in Self-Service	Entered in Assisted Service	Abandoned in Queue	Routed to DN	Routed to Agent
	2017-09-13	0	0	214	0	0	0
Another Check	2017-09-14	0	0	19	0	0	0
	Total	0	0	233	0	0	0
	2017-09-12	0	0	30	0	0	1
Chat Health Test	2017-09-15	0	0	6	0	0	4
	Total	0	0	36	0	0	5
	2017-09-12	1	0	1	0	0	0
Cyara_BH_Result_true	Total	1	0	1	0	0	0
	2017-09-12	2	2	0	0	0	0
Cyara_CustomService	Total	2	2	0	0	0	0
	2017-09-12	2	0	2	1	0	0
Cyara_HTTPRest_509Errorcode	Total	2	0	2	1	0	0
	2017-09-12	2	2	0	0	0	0
Cyara_HTTPRest_JSONPayload	Total	2	2	0	0	0	0
	2017-09-12	2	2	0	0	0	C
Cyara_HTTPRest_KVPair	Total	2	2	0	0	0	C
	2017-09-12	1	0	1	0	0	C
Cyara_HTTPRest_Multipleresponseheaders_ASPhase	Total	1	0	1	0	0	C
	2017-09-12	1	1	0	0	0	0
Cyara_HTTPRest_Multipleresponseheaders_SSPhase	Total	1	1	0	0	0	0
	2017-09-12	1	1	0	0	0	0
Cyara_HTTPRest_OutputParams_GET	Total	1	1	0	0	0	(
	2017-09-12	1	1	0	0	0	(
Cyara_HTTPRest_OutputParams_POST	Total	1	1	0	0	0	(
Cyara_HTTPREST_PUT	2017-09-12	1	1	0	0	0	(
	Total	1	1	0	0	0	
	2017-09-12	2	0	2	0	0	
Cyara_HTTPRest_PUT_FetchAudio_SSPHase	Total	2	0	2	0	0	

This report provides detailed information about the disposition of interactions that enter the Designer application, including detailed information about the number and percentage of interactions that are completed in each phase (Self-Service and Assisted Service).

To get a better idea of what this report looks like, view sample output from the report:

#### SampleSelfServiceStatisticsReport.pdf

The following tables explain the prompts you can select when you generate the report, and the metrics and attributes that are represented in the report:

### Prompts for the Self-Service Statistics Report

Prompt	Description
Pre-set Date Filter	From the list, choose a time period on which to report, and move it to the Selected list.
Start Date	Choose the first day from which to gather data into the report.
End Date	Choose the last day from which to gather data into the report.
Application	Choose the applications on which to report. By default, the report includes all applications; if you add any applications to the <b>Selected</b> list, then only those applications are included.

### Attributes used in the Self-Service Statistics Report

Attribute	Description
Application Name	This attribute enables data within the reporting interval to be organized by the name of the self-service and/or assisted-service Designer application.
Day	This attribute enables data within the reporting interval to be organized by a particular day.

### Metrics used in the Self-Service Statistics Report

Metric	Description	Source Table.Column or Calculation	
Entered in Self- Service	The total number of interactions that entered the Designer application in Self-Service.	AGT_SDR_SESSION_HOUR_*.SS_ENTERED	D
Contained in Self- Service	The total number of interactions that entered the Designer application in Self-Service and were concluded without entering Assisted-Service.	AGT_SDR_SESSION_HOUR_*.AS_CONTAIN	NED
Entered in Assisted Service	The total number of interactions	AGT_SDR_SESSION_HOUR_*.AS_ENTERED	D

Metric	Description	Source Table.Column or Calculation	
	that entered the Designer application in Assisted-Service.		
Abandoned in Queue	The total number of interactions that entered the Self-Service phase of the Designer application, requested Assisted-Service, and were subsequently abandoned while waiting in queue.	AGT_SDR_SESSION_HOUR_*.QUEUE	_ABANDONI
Routed to DN	The total number of interactions that entered the Self-Service phase of the Designer application and were later routed to a DN.	AGT_SDR_SESSION_HOUR_*.DN_RO	UTED
Routed to Agent	The total number of interactions that entered the Self-Service phase of the Designer application and were later routed to an agent.	AGT_SDR_SESSION_HOUR_*.AGENT	ROUTED

### Survey Answer Report

This page describes how you can use the (**Designer** folder) Survey Answer Report to learn more about how customers answer post-call survey questions. The report allows you to see the number and percentage of times that each answer was selected by customers, for each agent, and allows you to further organize the results by application, agent group, question, or answer, over various time-periods.

This report requires that the RAA option enable-sdr-survey be enabled. For more information, see the *Genesys CX Insights Deployment Guide*.

#### Understanding the Survey Answer Report

			Survey Answer Report			
Day	Agent Name	Survey Question	Survey Answer	Multi - Agent	Responses	Avg Response Ratio
2017-09-11	, Agent1 (Agent1)	Which language" is best?	English Java "Python C++ Swift JavaScript SQL	N	5	12.82%
		Total			5	12.82%
	Total				5	12.82%
2017-09-13	, Agent1 (Agent1)	Which language" is best?	English Java "Python C++ Swift JavaScript SQL	N	4	10.26%
		Total			4	10.26%
	, Agent3 (Agent3)	Which language" is best?	English Java "Python C++ Swift JavaScript SQL	N	2	5.13%
		Total			2	5.13%
	Total				6	15.38%
		How likely you would recommend your new phone to friends in a scale of 1 to 5?	1	N	4	10.26%
		How would you like to rate the agent in a scale of 1 to	3	N	4	10.26%

This report displays detailed information about the number and percentage of customers that selected each response while completing post-call surveys.

This report helps supervisors understand agent performance, as rated by customers who respond to post-call surveys.

It is important to note that some calls involve more than one agent; in these cases, the responses shown in the report pertain to the first agent who interacted with the customer, and only if that agent

was the first handling resource. If the first handling resource was not an agent (for instance, if it was an IVR), the Agent Name column contains no value. Customer responses might also reflect their experience in interacting with other agents who were involved in the call. If the **Multi-Agent** attribute contains a value of **Y** / **yes**, you can click the value to view information about all of the agents involved in the call.

To get a better idea of what this report looks like, view sample output from the report: SampleSurveyAnswerReport.pdf

#### Tip

#### Customization tips:

- To make reports easier to read, not all attributes that could usefully be applied appear in the report when you run it. Several additional attributes are listed in the table below; you can easily add these attributes to the report by dragging them from the Report Objects list into the Report view. For example, drag the **Application** attribute into position to the left of the first column in the table; the report automatically updates.
- You can simplify reports by removing objects. For example, drag the **Agents** attribute
  from the Report view to the Report Objects list the report automatically updates to
  display all relevant survey responses, irrespective of which agents were involved.
- Customizing reports requires specific permissions. For more information, see Customizing reports

The following tables explain the prompts you can select when you generate the report, and the metrics and attributes that are represented in the report.

### Prompts for the Survey Answer Report

Prompt	Description				
Application	Select an application on which to report.				
Pre-set Date Filter	From the list, choose a time period on which to report.				
Start Date	Choose the first day from which to gather report data.				
End Date	Choose the last day from which to gather report data.				
Agent	Optionally, select one or more agents for which to gather data for the report.				

### Attributes used in Survey Answer Report

Attribute	Description			
Agent Name	This attribute enables data to be organized by certain attributes of the agent who is associated with the interaction.			
Application Name	This attribute enables data to be organized by the application associated with the interaction.			
Day	This attribute enables data to be organized by a particular day within a month and year. Day values are presented in YYYY-MM-DD format.			
Multi-Agent	This attribute enables data to be organized by whether more than one agent interacted with the customer. If this value is <b>Y</b> (Yes), the responses shown in the report pertain to the first agent who interacted with the customer. However, customer responses in such scenarios might also reflect the customer interaction with other agents who were involved in the call.			
Survey Answer	This attribute enables data to be organized by survey answer.			
Survey Question	This attribute enables data to be organized by survey question.			

### Metrics used in the Survey Answer Report

Metric	Description				
Responses	The number of times that customers chose the indicated response for the indicated question. Click any value in the Responses column to open the Interaction Handling Attempt Report and view detailed information about the associated interactions.				
Avg Response Ratio	Calculated as the total number of times that customers chose the indicated response when answering the question after interacting with the indicated agent, divided by the total number of responses received.				

# Survey Statistics Report

This page describes how you can use the (**Designer** folder) Survey Statistics Report to learn more about how customers interact with post-call surveys. The report provides a quick summary of how many surveys were offered, accepted, or not accepted, and displays No Input and No Match errors.

Surveys are offered to customers early in the call in either the Self Service phase, or before routing begins in the Assisted Service phase, and customers can choose to complete the survey either after the self-service portion of the call, or after the interaction with the agent ends.

This report requires that the RAA option enable-sdr-survey be enabled. For more information, see the *Genesys CX Insights Deployment Guide*.

### Understanding the Survey Statistics Report

Survey Statistics Report								
Day	Offered	Accepted	Not Accepted	No Input Error	No Match Error	% Accepted		
2017-09-11	23	23	0	58	17	100.00%		
2017-09-12	23	23	0	62	21	100.00%		
2017-09-13	28	28	0	21	9	100.00%		
2017-09-14	47	44	3	17	23	93.62%		
2017-09-15	42	42	0	26	62	100.00%		
2017-09-18	0	0	0	3	0	0.00%		
Total	163	160	3	187	132	98.16%		

This report displays statistical information about post-call surveys, including how often surveys were offered, accepted, or not accepted (and the relative percentage that were accepted), and No Match and No Input errors.

To get a better idea of what this report looks like, view sample output from the report:

#### SampleSurveyStatisticsReport.pdf

#### Tip

#### **Customization tips:**

To make reports easier to read, not all attributes that could usefully be applied appear in
the report when you run it. Several additional attributes are listed in the table below;
you can easily add these attributes to the report by dragging them from the Report
Objects list into the Report view. For example, drag the **Application** attribute into
position to the left of the first column in the table; the report automatically updates.

- You can simplify reports by removing objects. For example, remove an attribute such as **Day** by dragging it out of the Report view into the Report Objects list.
- Customizing reports requires specific permissions. For more information, see Customizing reports

The following tables explain the prompts you can select when you generate the report, and the metrics and attributes that are represented in the report.

### Prompts for the Survey Statistics Report

Prompt	Description				
Pre-set Date Filter	From the list, choose a time period on which to report.				
Start Date	Choose the first day from which to gather report data.				
End Date	Choose the last day from which to gather report data.				
Application	This attribute enables data to be organized by the application associated with the interaction.				

### Attributes used in Survey Statistics Report

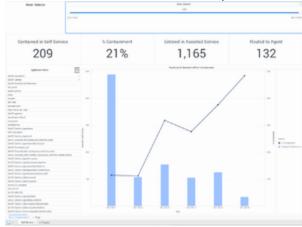
Attribute	Description			
Application Name	This attribute enables data to be organized by the name of the application associated with the interaction.			
Day	This attribute enables data to be organized by the day, displayed in the format YYYY-MM-DD.			

## Metrics used in the Survey Statistics Report

Metric	Description				
Offered	The number of times, within the reporting interval, that customers were offered the opportunity to complete a survey.				
Accepted	The number of times, within the reporting interval, that customers were offered the opportunity to complete a survey, and subsequently accepted the offer.				
Not Accepted	The number of times, within the reporting interval, that customers were offered the opportunity to complete a survey, and subsequently declined the offer. Calculated as Survey Offered minus Survey Accepted.				
No Input Error	No Input (NI). The total number of times that the application expected a response from a customer, but did not receive one within the configured timeout period (if a timeout period is configured).				
No Match Error	No Match (NM). The total number of times that the customer entered an unexpected response to a survey. For example, if the application expects an answers in the range of 1 to 4, and the customer selects 6, the event is recorded as an NM error.				
% Acceptance	The percentage of times that customers accepted the offer to complete a survey. Calculated as Survey Accepted divided by Survey Offered.				

# Weekly Self Service Containment Dashboard

The (**Dashboards** and **Designer** folders) Weekly Self Service Containment Dashboard provides detailed information and visualizations that you can use to learn about the number and percentage of interactions that enter each Designer Application and conclude in the Self-Service phase, compared to the number that enter the Assisted-Service phase and are routed to a DN or agent.



Weekly Self Service Containment Dashboard

### Understanding the Weekly Self Service Containment Dashboard

The Weekly Self Service Containment Dashboard provides an interactive weekly view of self-service and assisted-service statistics. Use the **Week Selector** slider to easily focus on one or more weeks — as indicated by week number, where W1 is the first week of the year, W10 is the tenth week of the year, and so on. To get a better idea of what this dashboard looks like, view sample output from the dashboard:

SampleWeekly Self Service Containment Dashboard .pdf

#### Link to video

The following tables explain the prompts you can select when you generate the dashboard, and the metrics and attributes that are represented in the dashboard:

Prompts available for the Weekly Self Service Containment

### Dashboard

The following table explains the prompts available for the Weekly Self Service Containment Dashboard:

Prompt	Description				
Pre-set Date Filter	From the convenient list of predefined dates, choose a date range for which to run the report. This option has no effect if you specify a Start Date and End Date.				
Start Date	Choose the first day from which to gather data into the dashboard.				
End Date	Choose the last day from which to gather data into the dashboard.				
Application	Optionally, choose one or more applications on which to focus the reprot.				

# Attributes used on the Weekly Self Service Containment Dashboard

The following table explains the attributes used on the Weekly Self Service Containment Dashboard:

Attribute	Description			
Application Name	Enables organization of data based on Designer application. Optionally make a selection in the list, to focus the report on a given application.			
Week	Enables organization of data by week. Drag the Week Selector control handles to change the focus of the report.			

### Metrics used on the Weekly Self Service Containment Dashboard

The following table explains the metrics used on the Weekly Self Service Containment Dashboard:

Metric	Description	Source Table.Column or Calculation
Contained in Self- Service	The total number of interactions that entered the Designer application in Self-Service and were concluded without entering Assisted-Service.	
% Containment	The percentage of interactions that entered the Designer	

Metric	Description	Source Table.Column or Calculation
	application in Self-Service and were concluded without entering Assisted-Service.	
Entered in Assisted Service	The total number of interactions that entered the Designer application in Assisted-Service.	
Routed to Agent	The total number of interactions that entered the Self-Service phase of the Designer application and were later routed to an agent.	
Entered in Self- Service	The total number of interactions that entered the Designer application in Self-Service.	

To view more detailed information about the metrics and attributes in this dashboard, and other metrics and attributes that can be used to customize reports, see the *Genesys CX Insights Projects Reference Guide*.

# Details reports

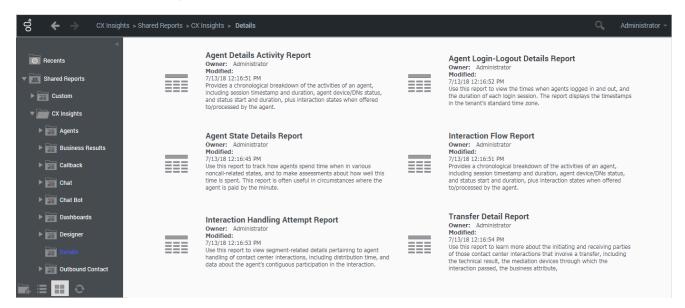
This page describes reports that contain detailed information about activity in your contact center. Reports in the **Details** folder are ready-to-use, but as always, can be modified to suit your specific business needs.

#### **Important**

Note the following:

- Reports in the Details folder are designed for troubleshooting purposes, and are not
  intended to be run regularly, or to be used to output all activity over a long period of
  time. These reports can take a long time to run and can impact performance. When you
  do run them, focus them on a specific area, or period of time (usually a single day or
  less).
- In some scenarios, a timeout or row-count limitation error can occur, particularly when
  you run Details reports for a time range of more than one day. The length of time over
  which you can run the Details reports successfully varies depending on the size,
  configuration, and amount of data in your contact center. If you encounter an error,
  reduce the time range, and try again until the report runs successfully. Conversely, if a
  Details runs successfully over a given period, you can experiment with running it over
  longer periods if needed.

### About Details reports



The following reports are available in the **CX Insights** > **Details** folder:

- Agent Details Activity Report
- · Agent Group Membership Details Report
- · Agent Login-Logout Details Report
- · Agent State Details Report
- Interaction Flow Report
- Interaction Handling Attempt Report
- Transfer Details Report

#### **Related Topics:**

- Go back to the complete list of available reports.
- Learn how to understand and use reports.
- Learn how to create or customize reports.

# Agent Details Activity Report

This page describes how you can use the (**Agents** folder and **Details** folder) Agent Details Activity Report to learn more about specific agents.

### Understanding the Agent Details Activity Report

					Ag	ent Details Activ	vity Report												
Tenant	Media Type	Session Key	Active Flag	Start Timestamp Sess	End Timestamp Sess	Start Timestamp State	End Timestamp State	Interaction Type	State Name	Active Time (Fmt)	Duration	Additional Info							
		3	0	1/14/2011 12:30:45 PM	1/14/2011 12:30:48 PM	1/14/2011 12:30:45 PM	1/14/2011 12:30:48 PM		NotReady	00:00:03	3	Reason Code: NO REASON							
						1/14/2011 12:36:51 PM	1/14/2011 12:37:17 PM		NotReady	00:10:45	26	Reason Code: NO REASON							
						1/14/2011 12:37:17 PM	1/14/2011 12:37:18 PM		Ready	00:10:45	1	Reason Code: RC_soft=89							
						1/14/2011 12:37:18 PM	1/14/2011 12:37:21 PM	Inbound	INBOUND Receiver Alert	00:10:45	3	Ixn ID:							
							1/14/2011 12:37:36 PM		Busy	00:10:45	18	Reason Code: NO REASO							
						1/14/2011 12:37:21 PM	1/14/2011 12:37:25 PM	Inbound	INBOUND Receiver Connect	00:10:45	4	Ixn ID:							
									1/14/2011 12:37:25 PM	1/14/2011 12:37:28 PM	Inbound	INBOUND Receiver Hold	00:10:45	3	Ixn ID: 1				
								1/14/2011 12:37:28 PM	1/14/2011 12:37:32 PM	Inbound	INBOUND Receiver Connect	00:10:45	4	Ixn ID:					
								1/14/2011 12:47:36 PM	1/14/2011 12:47:36 PM	1/14/2011 12:47:36 PM	M 1/14/2011 12:47:36 PM	1/14/2011 12:47:36 PM	1/14/2011 12:47:36 PM	1/14/2011 12:47:36 PM	1/14/2011 12:37:32 PM	1/14/2011 12:37:34 PM	Inbound	INBOUND Receiver Hold	00:10:45
		5	5 0 1/14/2	0 1/14	0	1/14/2011 12:36:51 PM 1/14/2	1/14/2011 12:36:51 PM								1/14/2011 12:47:36 PM	1/14/2011 12:47:26 DM	1/14/2011 12:37:34 PM	1/14/2011 12:37:36 PM	Inbound
								1/14/2011 12:37:36 PM	1/14/2011 12:37:41 PM		Ready	00:10:45	5	Reason Code: RC_soft=89					
						1/14/2011 12:37:41 PM	1/14/2011 12:39:24 PM		NotReady	00:10:45	103	Reason Code: RC_soft=89							
nvironmen	Voice						1/14/2011 12:39:24 PM		Ready	00:10:45	0	Reason Code: RC_soft=89							
										1/14/2011 12:39:24 PM	1/14/2011 12:39:28 PM	Inbound	INBOUND Receiver Alert	00:10:45	4	Ixn ID: 3			
									Busy	00:10:45	4	Reason Code: NO REASON							
						1/14/2011 12:39:28 PM	1/14/2011 12:39:36 PM		Ready	00:10:45	8	Reason Code: RC_soft=89							
									UNITORING	00:10:45	45	_ lxp.lD							

This report provides a chronological breakdown of the activities of one agent over a period of time that you specify including:

- The timestamp and duration of the agent's active (login) session.
- The collective status of the agent's devices or DNs (for example, Ready, NotReady, or Busy), when each status began for that DN, and its duration.
- The interaction state when it was offered to or being processed by the agent.

The Agent Summary Activity Reports complement this report by summarizing the durations of agent sessions, agent states, and interaction states over one day.

For those rows related to agent status, the Additional Information column provides the reason code selected for why the agent was in a particular state—if software and/or hardware reason codes are configured within your environment.

To get a better idea of what this report looks like, view sample output from the report:

#### SampleAgentDetailsActivityReport.pdf

The following tables explain the prompts you can select when you generate the report, and the metrics and attributes that are represented in the report:

### Prompts for the Agent Details Activity Report

Prompt	Description
Pre-set Day Filter	Choose from the convenient list of predefined rolling time ranges, spanning one day or more, over which to run the report.
Start Time	Choose the first day and time from which to gather report data.
End Time	Choose the last day and time from which to gather report data.
Single Agent (Required)	Select one or more agents from which to gather data for the report.
Media Type	Optionally, select the type of media to include in the report—for example, VOICE, EMAIL, and CHAT.
Interaction Type	Optionally, select the type of interaction to include in the report—for example, Inbound, Outbound, and Internal.
Tenant	For multi-tenant environments, optionally select the tenant(s) for which to include data in the report.

### Attributes used in the Agent Details Activity Report

Attribute	Description
Tenant	This attribute enables data within the reporting interval to be organized by tenant.
Media Type	This attribute enables data to be organized by the interaction's media type—for example, VOICE, EMAIL, and CHAT.
Session Key	This attribute enables data to be organized by the agent's active session for a particular media type.
Start Timestamp Sess	This attribute enables data to be organized by the calendar date and time when the agent session began.
End Timestamp Sess	This attribute enables data to be organized by the calendar date and time when the agent session ended. If the agent has not logged out, the value of this attribute is NULL.
Start Timestamp State	This attribute enables data to be organized by the

Attribute	Description	
	calendar date and time when the agent entered a specific state.	
End Timestamp State	This attribute enables data to be organized by the calendar date and time when the agent state ended.	
Interaction Type	This attribute enables data to be organized by the interaction's type—for example, Inbound, Outbound, and Internal.	
State Name	This attribute enables data to be organized by the state, such as UNKNOWN, NOTREADY, READY, BUSY, or INBOUND.	

### Metrics used in the Agent Details Activity Report

Metric	Description
Active Time (Fmt)	The total amount of time, in seconds, between the beginning and end of this agent's login session(s) on a particular media channel, irrespective of the intervals in which the resource session occurs. If an agent logs into multiple DNs, login duration is measured from the moment at which the agent logs in to the first DN to the moment at which the agent is no longer logged in to any DN. If the agent's session was still active when the data was compiled, the agent's session duration appears as null in the reports.  If the agent is not forcibly logged out when the calendar dates ends, login duration is split over both days.
Duration	The difference, in seconds, between the beginning and end of the agent's interaction-related state.
Additional Info	This attribute enables data to be organized by the primary key of the INTERACTION_FACT table. For voice interactions, the Interaction ID is the call's connection ID, which is assigned by the telephony server. This ID remains unchanged for as long as the telephony server processes the interaction. For multimedia interactions originating from an Interaction Server, this value is the assigned Interaction ID.

Because of the volume of data that this report could potentially generate, Genesys recommends that you restrict the start and end dates to the narrowest range that satisfies your report criteria. The default date selections span one day, and the Single Agent prompt is required.

Because this report weaves in the results from several Info Mart FACT tables to recount the story of the agent's activities, some of the report's records hold null values for columns that do not apply. For example, interaction types do not apply to agent status; therefore, no values will appear under the Interaction Type column for agent-state (or agent-session) records.

Many column headers in this report are generated from variables.

Data pertaining to interaction states is pulled directly from the Info Mart database. Refer to **The SM\_RES\_STATE\_FACT Table** section in the *Genesys Info Mart User's Guide* for special considerations regarding very short duration (>0 and <1 sec) states.

# Agent Group Membership Details Report

This page describes how you can use the (**Agents** and **Details** folders) **Agent Group Membership Details Report** to understand how agents are distributed among Agent Groups.

### Understanding the Agent Group Membership Details Report

Agent Group	Agent Name	Date Added	Date Remove
	, A101_sw1 (A101_sw1)	1/14/2011 11:43:39 AM	
AG1	, A102_sw1 (A102_sw1)	1/14/2011 11:43:39 AM	
	Last A601_swl, First A601_swl (A601_swl)	1/14/2011 11:43:39 AM	
AG123	, User_Tenant (User_Tenant2)	1/14/2011 11:43:39 AM	
Annah Grave 1	, Agent1 (Agent1)	1/14/2011 11:43:39 AM	
Agent Group 1	, Agent2 (Agent2)	1/14/2011 11:43:39 AM	
Annah Grave A	, Agent1 (Agent1)	1/14/2011 11:43:39 AM	
Agent Group 2	, Agent2 (Agent2)	1/14/2011 11:43:39 AM	
AgentGroup1Ten	601_swTen1, 601_swTen1 (601_swTen1)	1/14/2011 11:43:39 AM	
	, MMAgent1 (MMAgent1)	1/14/2011 11:43:39 AM	
	, MMAgent10 (MMAgent10)	1/14/2011 11:43:39 AM	
	, MMAgent2 (MMAgent2)	1/14/2011 11:43:39 AM	
	, MMAgent3 (MMAgent3)	1/14/2011 11:43:39 AM	
Took of about which on the control of	, MMAgent4 (MMAgent4)	1/14/2011 11:43:39 AM	
Chat distribution for processing	, MMAgent5 (MMAgent5)	1/14/2011 11:43:39 AM	
	, MMAgent6 (MMAgent6)	1/14/2011 11:43:39 AM	
	, MMAgent7 (MMAgent7)	1/14/2011 11:43:39 AM	
	, MMAgent8 (MMAgent8)	1/14/2011 11:43:39 AM	
	, MMAgent9 (MMAgent9)	1/14/2011 11:43:39 AM	
	, MMAgent1 (MMAgent1)	1/14/2011 11:43:39 AM	
	, MMAgent10 (MMAgent10)	1/14/2011 11:43:39 AM	
	, MMAgent2 (MMAgent2)	1/14/2011 11:43:39 AM	
	, MMAgent3 (MMAgent3)	1/14/2011 11:43:39 AM	
7 mail distribution for processing	, MMAgent4 (MMAgent4)	1/14/2011 11:43:39 AM	
E-mail distribution for processing	, MMAgent5 (MMAgent5)	1/14/2011 11:43:39 AM	
	, MMAgent6 (MMAgent6)	1/14/2011 11:43:39 AM	
	, MMAgent7 (MMAgent7)	1/14/2011 11:43:39 AM	
	, MMAgent8 (MMAgent8)	1/14/2011 11:43:39 AM	
	, MMAgent9 (MMAgent9)	1/14/2011 11:43:39 AM	
Z-mail QA review group	, MMAgent5 (MMAgent5)	1/14/2011 11:43:39 AM	
ForTest	, 601_forTest (601_forTest)	1/14/2011 11:43:39 AM	

Use the Agent Group Membership Details report to generate a detailed view of how agents are distributed among Agent Groups, including information about when each Agent entered and exited each group.

You can specify the Date, Agent Group, and Agent.

To get a better idea of what this report looks like, view sample output from the report: HRCXIAgentGroupMembershipDetails.pdf

The following tables explain the prompts you can select when you generate the report, and the metrics and attributes that are represented in the report:

### Prompts for the Agent Group Membership Details Report

Prompt	Description
Pre-set Day Filter	Choose a day from the list of preset options. This prompt overrides the Report Date value.
Report Date	Choose the starting date for the agent membership. Only agents who were added to the group after this date are included in the report.
Agent Group	Select one or more Agent Groups from which to gather data into the report.
Agent	Select one or more Agents from which to gather data into the report.

### Attributes used in the Agent Group Membership Details Report

Attribute	Description
Agent Group	This attribute enables data to be organized by Agent Group.
Agent Name	This attribute enables data to be organized by Agent Name.

### Metrics used in the Agent Group Membership Details Report

Metric	Description
Group Membership \ Date Added	The date and time when the agent joined the group.
Group Membership \ Date Removed	The date and time when the agent left the group.

# Agent Login-Logout Details Report

This page describes how you can use the (**Agents** folder and **Details** folder) Agent Login-Logout Details Report to learn more about agent login sessions.

### Understanding the Agent Login-Logout Details Report

Agent Login-Logout Details Report					
Tenant	Media Type	Agent Name	Start Timestamp	End Timestamp	Active Time (Fmt)
		4/11/2011 12:30:34 PM	4/11/2011 12:40:38 PM	00:10:0	
		, A6001 sip (A6001 sip)	4/11/2011 12:40:44 PM	4/11/2011 12:44:49 PM	00:04:0
		, A6001_SIP (A6001_SIP)	4/11/2011 12:48:30 PM	4/11/2011 12:51:48 PM	00:03:1
			4/11/2011 1:03:16 PM	4/11/2011 1:15:54 PM	00:12:3
			4/11/2011 12:31:08 PM	4/11/2011 12:38:02 PM	00:06:
			4/11/2011 12:41:01 PM	4/11/2011 12:44:47 PM	00:03:4
		, A6002_sip (A6002_sip)	4/11/2011 12:48:44 PM	4/11/2011 12:51:46 PM	00:03:
			4/11/2011 1:03:28 PM	4/11/2011 1:08:23 PM	00:04:
			4/11/2011 1:08:44 PM	4/11/2011 1:15:52 PM	00:07:
			4/11/2011 12:31:38 PM	4/11/2011 12:38:04 PM	00:06:
		75000 1 (75000 1 )	4/11/2011 12:41:40 PM	4/11/2011 12:44:45 PM	00:03:
	, A6003_sip (A6003_sip)	4/11/2011 12:49:19 PM	4/11/2011 12:50:50 PM	00:01:	
Environment Voice		4/11/2011 1:03:51 PM	4/11/2011 1:15:50 PM	00:11:	
nvironment	voice	, A6004_sip (A6004_sip)	4/11/2011 12:32:09 PM	4/11/2011 12:38:06 PM	00:05:
			4/11/2011 12:42:28 PM	4/11/2011 12:44:44 PM	00:02:
			4/11/2011 12:51:08 PM	4/11/2011 12:51:44 PM	00:00:
				05.17 PM	٥٥٠٠٥

This report shows the times when agents logged in and out and the duration of each login session during a range of hours that you specify within a day. The report displays the timestamps in the tenant's standard time zone.

If an agent logs in to multiple DNs, the duration of the agent's overall login session, which is captured by the Active Time metric, begins with the first login event and ends with the last logout event. If the agent continues to be logged in over a two-day time span (or longer) and is not forcibly logged out by the system, login duration is split over each calendar day.

To get a better idea of what this report looks like, view sample output from the report: SampleHRCXIAgntLogInOutReport.pdf

The following tables explain the prompts you can select when you generate the report, and the metrics and attributes that are represented in the report:

### Prompts for the Agent Login-Logout Details Report

Prompt	Description
Pre-set Day Filter	Choose from the convenient list of predefined days for which to run the report.
	The default selection for this report is Today.
Report Date	Choose a day for which to run the report.
Agent Group	Optionally, select one or more groups from which to gather data for the report.
Agent	Optionally, select one or more agents from which to gather data for the report.
Media Type	Optionally, select the type of media to include in the report; for example, VOICE, EMAIL, and CHAT.
Tenant	For multi-tenant environments, optionally select the tenant(s) for which to include data in the report.

### Attributes used in the Agent Login-Logout Details Report

Attribute	Description
Tenant	This attribute enables data within the reporting interval to be organized by tenant.
Media Type	This attribute enables data to be organized by the interaction's media type—for example, VOICE, EMAIL, and CHAT.
Agent Name	This attribute enables data to be organized by certain attributes of the agent who is associated with the interaction.
Start Timestamp	This attribute enables data to be organized by the calendar date and time when the agent session began.
End Timestamp	This attribute enables data to be organized by the calendar date and time when the agent session ended. If the agent has not logged out, the value of this attribute is NULL.

# Metrics used in the Agent Login-Logout Details Report

Metric	Description
Active Time (Fmt)	The total amount of time (HH:MM:SS) between the beginning and end of this agent's login session(s) on a particular media channel, irrespective of the intervals in which the resource session occurs. If an agent logs into multiple DNs, login duration is measured from the moment at which the agent logs in to the first DN to the moment at which the agent is no longer logged in to any DN. If the agent's session was still active when the data was compiled, the agent's session duration appears as null in the reports.  If the agent is not forcibly logged out when the calendar dates ends, login duration is split over both days.

# Agent State Details Report

This page describes how you can use the (**Agents** folder and **Details** folder) Agent State Details Report to learn more about how agents use their time when not in a call.

### Understanding the Agent State Details Report

			Agent State	Details	Report				
Tenant	Media Type	Agent Name	Start Timestamp	State	Reason Timestamp	Reason Code	Duration (Fmt)	Reason Time (Fmt)	Active
			4/11/2011 12:30:34 PM	Ready			00:00:20	00:00:00	
			4/11/2011 12:30:54 PM	Busy			00:03:35	00:00:00	
			4/11/2011 12:34:29 PM	Ready			00:06:09	00:00:00	
			4/11/2011 12:40:44 PM	Ready			00:00:11	00:00:00	
			4/11/2011 12:40:55 PM	Busy			00:03:45	00:00:00	
			4/11/2011 12:44:40 PM	Ready			00:00:09	00:00:00	
			4/11/2011 12:48:30 PM	Ready			00:00:10	00:00:00	
			4/11/2011 12:48:40 PM	Busy			00:03:01	00:00:00	
		, A6001_sip (A6001_sip)	4/11/2011 12:51:41 PM	Ready			00:00:07	00:00:00	
	it Voice		4/11/2011 1:03:16 PM	Ready			00:00:06	00:00:00	
			4/11/2011 1:03:22 PM	Busy			00:01:02	00:00:00	
			4/11/2011 1:04:24 PM	Ready			00:01:34	00:00:00	
Environment			4/11/2011 1:05:58 PM	Busy			00:01:16	00:00:00	
			4/11/2011 1:07:14 PM	Ready			00:01:16	00:00:00	
			4/11/2011 1:08:30 PM	Busy			00:00:56	00:00:00	
			4/11/2011 1:09:26 PM	Ready			00:00:09	00:00:00	
			4/11/2011 1:09:35 PM	NotReady			00:06:19	00:00:00	
			4/11/2011 12:31:09 Div	Ready			00:00:00	00:00:00	

This report displays the timestamps and durations of the various agent-state changes during a range of hours that you specify within a given day. This information enables supervisors to track how an agent spent his or her time in various non call-related states and to make assessments about how well this time was spent. If a hardware- or software-related reason was logged for any state, this reason also appears in the report.

Use this report for monitoring an agent's noncall-related activities, especially under those circumstances in which the agent is paid by the minute.

If the agent continues to be logged in over a two-day time span (or longer) and is not forcibly logged out by the system, state duration is split over each calendar day.

To get a better idea of what this report looks like, view sample output from the report:

#### SampleAgntStatReport.pdf

The following tables explain the prompts you can select when you generate the report, and the

metrics and attributes that are represented in the report:

### Prompts for the Agent State Details Report

Prompt	Description
Pre-set Day Filter	From the convenient list of predefined days, choose a day for which to run the report.
Report Date	Choose a day for which to run the report.
Agent Group	Optionally, select one or more groups from which to gather data for the report.
Agent	Optionally, select one or more agents from which to gather data for the report.
Reason Code Type	Optionally, select the reason code to include in the report.
Media Type	Optionally, select the type of media to include in the report—for example, VOICE, EMAIL, and CHAT.
Tenant	For multi-tenant environments, optionally select the tenant(s) for which to include data in the report.

### Attributes used in the Agent State Details Report

Attribute	Description
Tenant	This attribute enables data within the reporting interval to be organized by tenant.
Media Type	This attribute enables data to be organized by the interaction's media type—for example, VOICE, EMAIL, and CHAT.
Agent Name	This attribute enables data to be organized by certain attributes of the agent who is associated with the interaction.
Start Timestamp	This attribute enables data to be organized by the moment that the agent entered a specific state.
State	This attribute enables data within the reporting interval to be organized by the agent's state. Status values depend on the Genesys application (for example, Interaction Concentrator) that provides source data to Genesys Info Mart. For state values, refer to the description of this Info Mart table column in the Genesys Info Mart Physical Data Model documentation for your RDBMS (available from Genesys Info Mart documentation).
Reason Timestamp	This attribute enables data to be organized by the

Attribute	Description		
	moment when the agent entered a specific state- reason combination.		
Reason Code	This attribute enables data within the reporting interval to be organized by the reason that the agent selected.		

### Metrics used in the Agent State Details Report

Metric	Description			
Duration (Fmt)	The difference (HH:MM:SS) between the beginning and end of the agent's state.			
Reason Time (Fmt)	The total amount of time (HH:MM:SS) that this agent was in a specific state for a specific reason, irrespective of the interval(s) in which the statereason combination endures. This time is measured from the moment at which the agent enters this state-reason combination to the moment at which the agent exits this state or state-reason combination. If the agent's state was still active when the data was compiled, the duration of the agent in this state appears as null in the reports.			
Active	The Active column is a report variable based on the values of the Active Reason and Active State attributes.			

For this report to provide reason codes that might be associated with an agent's state, your environment must configure hardware and/or software reason codes. When configured, one report instance will provide either hardware- or software-related reasons, but not both in the same report.

For this report to provide uninterrupted ACW and NotReady state details, you must appropriately configure the underlying ICON application supplying data to Genesys Info Mart (gls-enable-acw-busy). Refer to The SM\_RES\_STATE\_FACT Table section in the Genesys Info Mart User's Guide for special considerations regarding very short duration (>0 and <1 sec) states.

The Active column is a report variable based on the values of the Active Reason and Active State attributes.

# ANI Details Report

The (**Details** folder) ANI Details Report provides detailed information about the outcomes of customer interactions, based on Automatic Number Identification (ANI), enabling you to identify frequent callers and the result of their interactions. The report provides a detailed analysis of call volumes, durations, handle times, and outcomes. The report enables you to explore outcomes on a daily or hourly basis; otherwise it is similar to the ANI Details Dashboard.

### Understanding the ANI Details Report

#### 1

The report offers two views of the data:

- **Day** -- This is the default report. ANI information is organized based on the day on which a call was made.
- **Hour** -- Click on the values in the **Day** column to open the Hourly version of the report, which organizes the data based on the hour of the day (1-24).

To get a better idea of what this dashboard looks like, view sample output from the report:

- SampleANIDetailsReport\_Day.pdf
- · SampleANIDetailsReport Hourly.pdf

The following tables explain the prompts you can select when you generate the report, and the metrics and attributes that are represented in the report:

#### **Prompts on the ANI Detail Report**

Prompt	Description			
Pre-set Date Filter	Choose a date from the list of preset options. If this prompt is set to anything other than <b>none</b> , the Date prompts are ignored. By default, the report captures data from the preceding 31 days.			
Start Date	Choose the first day from which to include data in the report.			
End Date	Choose the last day from which to include data in the report.			

#### **Attributes on the ANI Details Dashboard**

Attribute	Description
Callers List	This section provides a summary of the number of interactions for each caller. Click (or shift-click) in this list to focus the report on individual callers.

les data to be organized based on the ANI associated with callers.
les data to be organized based on the day on a call was made. (YYYY-MM-DD) on values in this column to open the report in burly view (instead of Day).
les data to be organized based on the hour of ay (1-24) at which a call was made. (YYYY-MM-H) attribute is not initially visible on the report. To so the Hourly view, click on values in the Day on to open the report in an Hourly view ead of Day).
les data to be organized based on the DN or ess to which the caller was connected.
les data to be organized based on the type of action.
les data to be organized based on the type of a.
les data to be organized based on the type ling resource.
les data to be organized based on the user e of the handling resource.
les data to be organized based on disposition, kample, Abandoned, Completed, Diverted, d, and Transferred.
les data to be organized by the reason for the nical result; for example, Abandoned-Ringing, AnsweredByAgent, or eOnNoAnswer.

#### **Metrics on the ANI Details Dashboard**

Metric	Description			
Customer Handle Time (FMT)	The total time spent handling the interaction, calculated as the sum of the Customer Engage Time, Customer Hold Time, and Customer Wrap Time metrics.			
Interaction Duration (FMT)	The amount of time that the state persisted (HH:MM:SS), calculated as the difference between the beginning and end of the agent's state.			
Interactions	The number of interactions associated with a given source address.			

To view more detailed information about the metrics and attributes in this report, and other metrics and attributes that can be used to customize reports, see the *Genesys CX Insights 9.0 Projects Reference Guide*.

# Interaction Flow Report

This page describes how you can use the **Details** folder > **Interaction Flow Report** to better manage customer relationships by analyzing and understanding how interactions proceed from the customer's perspective.

### Understanding the Interaction Flow Report

Timestamp	Customer ID	Media Type	Interaction Type	Source Name	Source Type	Target Name	Target Type	Technical Result Resource Role	Technical Result Role Reason	Technical Result Reason	Technical Result
1 12:37:18 PM	DEFAULT_CUSTOMER_ID	Voice	Inbound	NONE	NONE	8001	Queue	Received	Unspecified	AnsweredByAgent	Diverted
1 12:37:36 PM	DEFAULT_CUSTOMER_ID	Voice	Inbound	8001	Queue	Agent1	Agent	DivertedTo	Unspecified	Unspecified	Completed
11 12:39:24 PM	DEFAULT_CUSTOMER_ID	Voice	Inbound	NONE	NONE	8001	Queue	Received	Unspecified	AbandonedWhileRinging	Diverted
011 12:40:21 PM	DEFAULT_CUSTOMER_ID	Voice	Inbound	8001	Queue	Agent1	Agent	DivertedTo	Unspecified	AbandonedWhileRinging	CustomerAbandoned
2011 12:41:07 PM		Voice	Inbound	NONE	NONE	8001	Queue	Received	Unspecified	AbandonedWhileQueued	CustomerAbandoned
2011 12:47:36 PM		Voice	Inbound	NONE	NONE	8001	Queue	Received	Unspecified	Unspecified	Diverted
2011 1:15:01 PM	DEFAULT_CUSTOMER_ID	Voice	Inbound	NONE	NONE	8001	Queue	Received	Unspecified	AbandonedWhileRinging	Diverted
2011 1:14:36 PM	DEFAULT_CUSTOMER_ID	Voice	Inbound	8001	Queue	Agent1	Agent	DivertedTo	Unspecified	AbandonedWhileRinging	CustomerAbandone
2011 12:53:36 PM	DEFAULT_CUSTOMER_ID	Voice	Inbound	NONE	NONE	8001	Queue	Received	Unspecified	Redirected	Diverted
011 12:53:50 PM	DEFAULT_CUSTOMER_ID	Voice	Inbound	NONE	NONE	8002	Queue	Received	Unspecified	AnsweredByAgent	Diverted
11 12:56:53 PM	DEFAULT_CUSTOMER_ID	Voice	Inbound	8001	Queue	Agent1	Agent	DivertedTo	Unspecified	RouteOnNoAnswer	Redirected
1 12:56:56 PM	DEFAULT_CUSTOMER_ID	Voice	Inbound	8002	Queue	Agent2	Agent	DivertedTo	Unspecified	Unspecified	Completed
1 12:57:56 PM	DEFAULT_CUSTOMER_ID	Voice	Inbound	NONE	NONE	8001	Queue	Received	Unspecified	Redirected	Diverted
11 12:58:07 PM	DEFAULT_CUSTOMER_ID	Voice	Inbound	NONE	NONE	8002	Queue	Received	Unspecified	AbandonedWhileRinging	Diverted
011 12:58:02 PM	DEFAULT_CUSTOMER_ID	Voice	Inbound	8001	Queue	Agent1	Agent	DivertedTo	Unspecified	RouteOnNoAnswer	Redirected
2011 12:58:10 PM	DEFAULT_CUSTOMER_ID	Voice	Inbound	8002	Queue	Agent2	Agent	DivertedTo	Unspecified	AbandonedWhileRinging	CustomerAbandoned
2011 12:58:52 PM	DEFAULT_CUSTOMER_ID	Voice	Inbound	NONE	NONE	8001	Queue	Received	Unspecified	Redirected	Diverted
2011 12:59:07 PM		Voice	Inbound	NONE	NONE	8002	Queue	Received	Unspecified	AbandonedWhileQueued	CustomerAbandone
2011 12:58:57 PM	DEFAULT_CUSTOMER_ID	Voice	Inbound	8001	Queue	Agent1	Agent	DivertedTo	Unspecified	RouteOnNoAnswer	Redirected
2011 1:17:15 PM	unknown	Voice	Inbound	8001	Queue	Agent1	Agent	InitiatedConsult	Unspecified	Unspecified	Completed
		-		NONE	NONE		-			AnsweredByAgent	Divorted

This report traces an interaction as it passes through various contact center resources—showing each target that the interaction reached, how the interaction was processed at that target (for example, Abandoned, Completed, Diverted, or Transferred), and how long the processing took there, as well as general details about the interaction.

The targets are handling and mediation resources including contact center agents, self-service IVR ports, ACD queues, virtual queues, interaction queues, and workbins. This report does not expose whether extended facts were used while the interaction was being processed, such as whether treatments were applied or speech recognition was used; nor does this report capture changes in user data or agent states.

This report can be useful for validating the results of some of the aggregated reports.

Because of the volume of data that this report could potentially generate, Genesys recommends that you restrict the start and end dates to the narrowest range that satisfies your report criteria. The default date selections span one day. Specification of agent and queue prompts will also improve report performance and limit the data that is returned.

The Interaction Handling Attempt Report opens this report when you select an ID from the Interaction ID column in that report. To run this report as stand-alone, either provide a valid Interaction ID in the user prompt area, or use the default value (0) which returns all interactions that satisfy the report's other conditions.

To get a better idea of what this report looks like, view sample output from the report: SampleInteractionFlowReport.pdf

The following tables explain the prompts you can select when you generate the report, and the metrics and attributes that are represented in the report:

### Prompts in the Interaction Flow Report

Prompt	Description
Pre-set Day Filter	Choose from the convenient list of predefined rolling time ranges, spanning one day or more, over which to run the report.
Start Time	Choose the first day and time from which to gather report data.
End Time	Choose the last day and time from which to gather report data.
Target Agent	Optionally, select an agent on which to focus the report. The selections that you make at the Target Agent and Target Queue prompts are interdependent.
Target Queue	Optionally, select an ACD queue on which to focus the report. The selections that you make at the Target Agent and Target Queue prompts are interdependent.
Customer ID	From the list, optionally choose a customer ID on which to focus the report.
From	From the list, optionally choose a source address on which to focus the report.
То	From the list, optionally choose a target address on which to focus the report.
Media Type	Optionally, select a media type on which to focus the report.
Interaction Type	Optionally, select an interaction type on which to focus the report
Tenant	Optionally, select a tenant on which to focus the report.
Interaction ID	Optionally, select an interaction ID of the INTERACTION_FACT or the INTERACTION_RESOURCE_FACT table on which to focus.

# Attributes used in the Interaction Flow Report

Attribute	Description
Tenant	Enables data within the reporting interval to be organized by tenant. For multi-tenant environments, the universe connection that you define points to only one tenant schema in Info Mart. New connections are required for access to other tenant schemas.
Start Time	Enables data to be organized by the time at which the interaction began.
	Enables data to be organized by the interaction ID of the INTERACTION_FACT or the INTERACTION_RESOURCE_FACT table. For voice interactions, the Interaction ID is the call's connection ID, which is assigned by the telephony server.
Interaction ID	This ID remains unchanged for as long as the telephony server processes the interaction. For multimedia interactions originating from an Interaction Server, this value is the assigned Interaction ID.
	<b>Note</b> : You can click values in the Interaction ID column to automatically open the <b>Interaction Handling Attempt Report</b> to see more detailed information about the handling of that interaction.
From	Enables data to be organized by the source address of the interaction. For voice, the source address is the interaction's automatic number identification (ANI). For email, the source address is the customer's email address. For chat, the source address is empty.
То	Enables data to be organized by the target address of the interaction. For voice, the target address is the interaction's dialed number identification service (DNIS). For email, the target address is a contact center email address. For chat, the target address is empty.
Connection ID	Enables data to be organized by attributes of the interaction's connection ID.
GUID	Enables data to be organized by the globally unique identifier of the interaction as reported by the interaction media server. This identifier may not be unique. In the case of T-Server voice interactions, the GUID is the Call UUID. In the case of Multimedia, the GUID is the Interaction ID from Interaction Server.
Start Timestamp	Enables data to be organized by the moment when the interaction began.
End Timestamp	Enables data to be organized by the moment when the interaction ended.
Customer ID	The customer ID as it appears in an external CRM

Attribute	Description
	application. This value enables Genesys Info Mart tables to be joined to external data-mart tables and is referenced by the user-defined Genesys Info Mart key that has an ID of 10053. Refer to the Genesys Info Mart Deployment Guide for information about Genesys Info Mart attached data key assignments.
	Note: The Customer ID attribute references a field in a derived table whose values are sourced, in part, from the listed Info Mart table.
Media Type	Enables data to be organized by the media type of the interaction—for example, Voice, Email, and Chat.
Interaction Type	Enables data to be organized by the interaction's type—for example, Inbound, Outbound, and Internal.
Source Name	Enables data to be organized by the name of the originating resource—for example, the IVR port number; the name of the queue; or the first, last, and user name of the agent.
Source Type	Enables data to be organized by the resource's type—for example, Agent, Queue, and IVRPort.
Target Name	Enables data to be organized by the name of the agent, queue, or self-service IVR port that processed the interaction.
Target Type	Enables data to be organized by the resource type—for example, Agent, Queue, and IVRPort.
Technical Result Resource Role	Enables data to be organized by the role that is associated with the resource—for example, Puller, Received, and RoutedTo.
Technical Result Role Reason	Enables data to be organized by the reason of the resource role—for example, Conference-Initiator, ConferenceJoined, and PulledBackTimeout.
Technical Result Reason	Enables data to be organized by the reason for the technical result—for example, Abandoned-WhileRinging, AnsweredByAgent, and RouteOnNoAnswer.
Technical Result	Enables data to be organized by its disposition—its technical result and other aspects of the technical result—for example, Abandoned, Completed, Diverted, Pulled, and Transferred.
Active	Enables data to be organized by whether or not the corresponding record in the INTERACTION_FACT table is active.

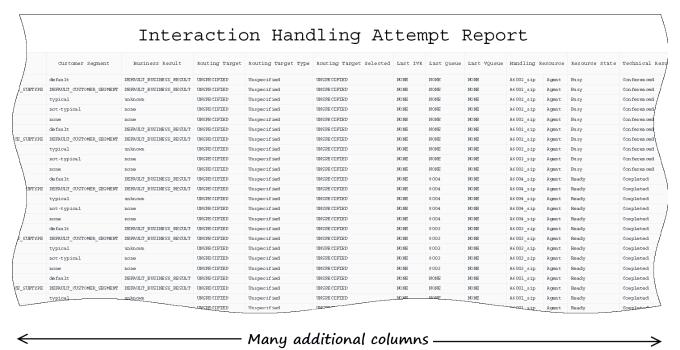
# Metrics used in the Interaction Flow Report

Metric	Description
	This metric gathers durations from two tables:
	<ul> <li>MEDIATION_SEGMENT_FACT (MSF), measuring mediation segments</li> </ul>
	<ul> <li>INTERACTION_RESOURCE_FACT (IRF), measuring interaction handling attempts</li> </ul>
Duration	From MSF, this duration represents the time, in seconds, from when the interaction entered the queue until the interaction reached the handling resource after distribution from the queue. If the interaction is abandoned or cleared, total duration equals queue duration, which ends when the interaction left the queue.
	From IRF, this duration represents the time, in seconds from the moment at which the interaction reaches the handling resource's DN (including ring time) to the moment at which the handling resource disconnects or when ACW for the interaction ends.

# Interaction Handling Attempt Report

This page describes how you can use the (**Detail** folder) Interaction Handling Attempt Report to learn more about interaction handling in the contact center.

### Understanding the Interaction Handling Attempt Report



This report summarizes segment-related details with regard to an agent's handling of contact center interactions that are stored in the Info Mart INTERACTION\_RESOURCE\_FACT table, providing both the time that was required to distribute the interaction to the agent and data about the agent's contiguous participation in the interaction.

This report provides data for all interaction types, but excludes extended facts that might be associated with the interaction, such as whether treatments were applied while the customer was waiting to be connected to the agent.

The "customer" in the CUSTOMER measures is the initiator of the interaction, and might not explicitly be a customer who is external to the contact center. For example, the customer of an internal interaction is the initiating agent.

To get a better idea of what this report looks like, view sample output from the report:

#### SamplelxnHndlngAttmptReportReport.pdf

The following tables explain the prompts you can select when you generate the report, and the metrics and attributes that are represented in the report:

### Prompts for the Interaction Handling Attempt Report

Prompt	Description
Pre-set Day Filter	From the list, choose a day for which to gather data into the report.
Start Time	Choose beginning time for which to gather report data.
End Time	Choose end time for which to gather report data.
Target Agent Group	From the list, choose an agent group on which to focus the report.
Target Agent	From the list, choose an agent on which to focus the report.
Last Queue	From the list, choose a queue on which to focus the report. The report will include only interactions that traveled through the selected queue immediately before the interaction was handled.
Customer ID	From the list, choose a customer ID on which to focus the report.
From	From the list, choose a source address on which to focus the report.
То	From the list, choose a target address on which to focus the report.
Business Result	From the list, choose a business result on which to focus the report.
Customer Segment	From the list, choose a customer segment on which to focus the report.
Service Type	From the list, choose a service type on which to focus the report.
Service Subtype	From the list, choose a service subtype on which to focus the report.
Media Type	Optionally, select the type of media to include in the report—for example, VOICE, EMAIL, and CHAT.
Interaction Type	Optionally, select the type of interaction to include in the report—for example, Inbound, Outbound, and Internal.
Tenant	For multi-tenant environments, optionally select the tenant(s) for which to include data in the report.
Interaction ID	Optionally, select an interaction ID of the INTERACTION_FACT or the

Prompt	Description
	INTERACTION_RESOURCE_FACT table. For voice interactions, the Interaction ID is the call's connection ID, which is assigned by the telephony server. This ID remains unchanged for as long as the telephony server processes the interaction. For multimedia interactions originating from an Interaction Server, this value is the assigned Interaction ID.
Interaction Windows Size	Optionally, change the window size; reducing this value can improve report performance.

### Attributes used in the Interaction Handling Attempt Report

Attribute	Description
Tenant	This attribute enables data within the reporting interval to be organized by tenant.
Media Type	Enables data to be organized by the media type of the interaction—for example, VOICE, EMAIL, and CHAT.
Interaction ID	This attribute enables data to be organized by the interaction ID of the INTERACTION_FACT or the INTERACTION_RESOURCE_FACT table. For voice interactions, the Interaction ID is the call's connection ID, which is assigned by the telephony server. This ID remains unchanged for as long as the telephony server processes the interaction. For multimedia interactions originating from an Interaction Server, this value is the assigned Interaction ID.  Note: You can click values in the Interaction ID column to automatically open the Interaction Flow Report to see more detailed information about the flow of the indicated interaction.
Start Timestamp	Enables data to be organized by the moment when the interaction began.
End Timestamp	Enables data to be organized by the moment when the interaction ended.
From	Enables data to be organized by the source address of the interaction. For voice, the source address is the interaction's automatic number identification (ANI). For email, the source address is the customer's email address. For chat, the source address is empty.
То	Enables data to be organized by the target address of the interaction. For voice, the target address is the interaction's dialed number identification service (DNIS). For email, the target address is a contact center email address. For chat, the target

Attribute	Description
	address is empty.
GUID	Enables data to be organized by the globally unique identifier of the interaction as reported by the interaction media server. This identifier may not be unique. In the case of T-Server voice interactions, the GUID is the Call UUID. In the case of Multimedia, the GUID is the Interaction ID from Interaction Server.
Interaction Handling Attempt ID	Enables data to be organized by the primary key of the INTERACTION_RESOURCE_FACT table.
Interaction Type	This attribute enables data to be organized by the interaction's type—for example, Inbound, Outbound, and Internal.
Customer ID	The customer ID as it appears in an external CRM application. This value enables Genesys Info Mart tables to be joined to external data-mart tables and is referenced by the user-defined Genesys Info Mart key that has an ID of 10053. Refer to the <i>Genesys Info Mart Deployment Guide</i> for information about Genesys Info Mart attached data key assignments.  The Customer ID attribute in the Flow class references a field in a derived table whose values are sourced, in part, from the listed Info Mart table.
Handling Attempt Start	Enables data to be organized by the moment when the resource's participation in the interaction started.
Handling Attempt End	Enables data to be organized by the moment when the resource's participation in the interaction ended.
Service Type	This attribute enables data to be organized by the type of service that was assigned to the interaction.
Service Subtype	This attribute enables data to be organized by the detailed type of service that the customer requested.
Customer Segment	This attribute enables data to be organized by the configured customer segment.
Business Result	This attribute enables data to be organized by the configured business result.
Routing Target	This attribute enables data to be organized by the name of the agent group, place group, or skill expression that served as the target of the routing strategy.
Routing Target Type	This attribute enables data to be organized by the type of the routing target—for example, Agent, Place, Agent Group, Routing Point, and Queue.
Routing Target Selected	This attribute enables data to be organized by the name of the DN group that is the target of the

Attribute	Description
	routing strategy.
Last IVR	This attribute enables data to be organized by the name of the IVR in which the interaction traveled.
Last Queue	This attribute enables data within the reporting interval to be organized by the type of queue, such as ACDQueue, InteractionQueue, or InteractionWorkBin.
	Adding this attribute to a report can have a significant impact on performance.
Last VQueue	This attribute enables data to be organized by the name of the last virtual queue in which the interaction traveled before it was handled.
Handling Resource	This attribute enables data to be organized by the name of the queue, virtual queue, workbin, Interaction queue, IVR port, or agent.
Resource State	The media-neutral state of the resource—for example, Ready, WorkingReady, and WorkingNotReady.
Technical Result	This attribute enables data to be organized by its disposition—its technical result and other aspects of the technical result—for example, Abandoned, Completed, Diverted, Pulled, and Transferred.
Technical Result Reason	Enables data to be organized by the reason for the technical result—for example, Abandoned-WhileRinging, AnsweredByAgent, and RouteOnNoAnswer.
Technical Result Resource Role	Enables data to be organized by the role that is associated by the resource—for example, Puller, Received, and RoutedTo.
Technical Result Role Reason	Enables data to be organized by the reason of the resource role—for example, Conference-Initiator, ConferenceJoined, and PulledBackTimeout.
	The meaning of this attribute varies for voice and multimedia interactions:
Stop Action	<ul> <li>For voice, this attribute enables data to be organized by whether the handling resource released the call.</li> </ul>
	<ul> <li>0-Indicates that the handling resource did not release the call.</li> </ul>
	<ul> <li>1-Indicates that the handling resource did release the call.</li> </ul>
	<ul> <li>null-Indicates that this information is not available.</li> </ul>
	For multimedia, this attribute enables data to be organized by whether the interaction was

Attribute	Description
	released by the last interaction resource fact (IRF) that is associated with the interaction:
	<ul> <li>0-Indicates that the interaction was stopped at the associated IRF resource by some entity that was not a party to the interaction, such as by Interaction Server or a media server.</li> </ul>
	<ul> <li>1-Indicates that the interaction was stopped by the associated IRF resource.</li> </ul>
	<ul> <li>null-Indicates that the interaction was not stopped at the associated IRF resource.</li> </ul>
	Refer to the Genesys Info Mart documentation relevant to your RDBMS (Microsft SQL Server, PostgreSQL, or Oracle) for information about IRFs and parties.

### Metrics used in the Interaction Handling Attempt Report

Metric	Description
Interaction Duration (Fmt)	This metric gathers durations (HH:MM:SS) from the INTERACTION_RESOURCE_FACT (IRF), measuring interaction handling attempts. This duration represents the time, in seconds from the moment at which the interaction reaches the handling resource's DN (including ring time) to the moment at which the handling resource disconnects or when ACW for the interaction ends.
Response Time (Fmt)	The time that elapsed (HH:MM:SS) before the customer received service or abandoned the interaction, including the time that the interaction spent in a queue (including routing points and nonself-service IVR ports) prior to abandonment or reaching a handling resource (agent or self-service IVR) as well as the alert duration at the resource prior to the interaction being accepted. Additionally, this measure includes the mediation duration of any immediate previous attempt to deliver the interaction that was redirected with a technical result of RoutedOnNoAnswer or Unspecified, as well as the alert duration that is associated with this attempt.  Received consultations and collaborations are excluded from consideration.
Queue Time (Fmt)	The sum of the durations (HH:MM:SS) that interactions spent at ACD queue resources prior to arrival at the IRF resource. This duration excludes abandoned-while-queued interactions.

Metric	Description
Routing Point Time (Fmt)	The sum of the durations (HH:MM:SS) that this IRF spent in routing point resources or routing strategy resources prior to arrival at the IRF resource.
Total Duration (Fmt)	The total duration (HH:MM:SS) of the IRF resource's participation in the interaction, irrespective of the interval(s) in which the IRF endures, including hold duration and the time that the interaction spent in mediation. This measure excludes alert duration, received consultations, and received collaborations.
Customer Engage Time (Fmt)	<ul> <li>The amount of time (HH:MM:SS) that the agent processed a customer-related interaction at this resource during an interaction handling attempt. This measure includes internal interactions.</li> <li>For synchronous interactions, this is the time that the agent spent interacting with a customer. The duration includes talk duration of conferenced interactions.</li> <li>For asynchronous interactions, this is the time that the agent spent handling an inbound interaction from a customer, handling an internal interaction from another agent, or handling a reply interaction back to the customer.</li> <li>This duration excludes consultations and collaborations, whether they were initiated or received.</li> </ul>
Customer Hold Time (Fmt)	The amount of time (HH:MM:SS) that the agent had the customer on hold. This measure excludes hold durations that are associated with initiated or received consultations but includes hold duration of conferenced interactions.
Customer Handle Time (Fmt)	The sum of the Customer Engage Time, Customer Hold Time, and Customer Wrap Time metrics.
Customer Alert Time (Fmt)	For voice interactions, the amount of time (HH:MM:SS) that the interaction was ringing at the resource during a voice handling attempt while a customer was present.  For multimedia interactions, the amount of time (HH:MM:SS) that the customer-related interaction was alerting at the resource during an interaction handling attempt. For email interactions, this measure includes agent's handling of an inbound email from a customer or an internal email from another agent, or handling a reply email back to the customer. This measure excludes handling a collaboration, whether on the initiating or receiving side.
Customer Dial Time (Fmt)	The amount of time (HH:MM:SS) that the IRF resource spent initiating an outbound, customer-related interaction. The duration starts when the dialing event is sent, includes the mediation time that the initiator incurs while waiting for the target

Metric	Description
	resource to connect, and ends when the call is either established or terminated on no answer. Initiated consultations are excluded from consideration.
Customer Wrap Time (Fmt)	The amount of time (HH:MM:SS) that the resource was in interaction-related After-Call Work (ACW or Wrap) state that pertained to this customer voice-interaction resource. The duration excludes ACW duration that is associated with received consultations.
Conference Initiated Time (Fmt)	The amount of time (HH:MM:SS) that a conference initiated by the IRF resource was connected (established). Duration applies only to the portion of the IRF that represents the IRF resource as a conference initiator.
Conference Received Time (Fmt)	The amount of time (HH:MM:SS) that a conference that was joined by the IRF resource was connected (established). Duration applies only to the portion of the IRF that represents the IRF resource as a conference joiner.

Because of the volume of data that this report could potentially generate, Genesys recommends that you restrict the start and end dates to the narrowest range that satisfy your report criteria. The default date selections span one day. Specification of agent and queue prompts will also improve report performance and limit the data that is retrieved.

Unlike the prompt behavior in all other reports, the time component of the Start and End Time prompts is active. For multiple-switch environments that share the same queue names across switches, you can customize this report to recognize a particular switch-queue combination (instead of the queue alone) to retrieve the desired results.

For Oracle RDBMSs, the Handling Attempt Hint attribute must be listed first on the query panel in order for the instructions of optimization to be processed.

## Transfer Detail Report

This page describes how you can use the **Details** folder > **Transfer Detail Report** to learn more about the initiating and receiving parties of those contact center interactions that involve a transfer, including the technical result, the mediation devices through which the interaction passed, the business attribute, and the entire duration of the interaction.

#### Understanding the Transfer Detail Report

e	Source Technical Result Role Reason	Source Service Type	Source Service Subtype	Source Customer Segment	Source Business Result	Source Last Queue	Handling Attempt Target Start	Target Name	Target Type	Target Technical Result	Target Technical Result Reason	Target Technical Result Resource Role	Target Technical Result Role Reason
	Unspecified	DEFAULT_SERVICE	DEFAULT_SERVICE DEFAULT_SERVICE		DEFAULT_BUSINES	8001	1/14/2011 1:37:18 PM	Agent2	Agent	Completed	Unspecified	ReceivedTransfer	Unspecified
	Unspecified	DEFAULT_SERVICE	DEFAULT_SERVICE DEFAULT_SERVICE		DEFAULT_BUSINES	8001	1/14/2011 1:38:50 PM	Agent2	Agent	Completed	Unspecified	InConference	Unspecified
	Unspecified	DEFAULT_SERVICE	DEFAULT_SERVICE DEFAULT_SERVICE	DEFAULT_CUSTOM	DEFAULT_BUSINES	8001	1/14/2011 1:44:19 PM	Agent2	Agent	Completed	Unspecified	ReceivedTransfer	Unspecified
	Unspecified	DEFAULT_SERVICE	DEFAULT_SERVICE DEFAULT_SERVICE	DEFAULT_CUSTOM	DEFAULT_BUSINES	8001	1/14/2011 1:46:53 PM	Agent2	Agent	CustomerAbandon	AbandonedWhileRi	ReceivedTransfer	Unspecified
\	Unspecified	DEFAULT_SERVICE	DEFAULT_SERVICE DEFAULT_SERVICE		DEFAULT_BUSINES	8001	1/14/2011 1:48:38 PM	8002	Queue	CustomerAbandon	AbandonedWhileQu	ReceivedTransfer	Unspecified
lt	Unspecified	Inbound	Inbound - via Queue	typical	unknown	8002	1/14/2011 1:56:38 PM	Agent3	Agent	Completed	Unspecified	ReceivedConsult	Unspecified
ult	Unspecified	Inbound	Inbound - via Queue	typical	unknown	8002	1/14/2011 1:57:52 PM	Agent3	Agent	Abandoned	Unspecified	ReceivedConsult	Unspecified
ult	Unspecified	Inbound	Inbound - via Queue	typical	unknown	8002	1/14/2011 1:59:11 PM	8003	Queue	Abandoned	Unspecified	ReceivedConsult	Unspecified
	Unspecified	DEFAULT_SERVICE	DEFAULT_SERVICE DEFAULT_SERVICE	DEFAULT_CUSTOM	DEFAULT_BUSINES	8001	1/14/2011 2:11:52 PM	Agent2	Agent	Completed	Unspecified	ReceivedTransfer	Unspecified
	Unspecified	DEFAULT_SERVICE	DEFAULT_SERVICE - DEFAULT_SERVICE	DEFAULT_CUSTOM	DEFAULT_BUSINES	8001	1/14/2011 2:13:32 PM	Agent2	Agent	Completed	Unspecified	InConference	Unspecified

You can obtain additional information about a particular interaction by clicking its ID within the generated report. This action passes the value that you click and opens the Interaction Handling Attempt Report in a new browser window where you can view (among other information) data about the agent's contiguous participation in the interaction.

For Oracle RDBMSs, the Transfer Hint attribute must be listed first in order for the optimization instructions to be processed.

To get a better idea of what this report looks like, view sample output from the report: SampleTransferDetailsReport.pdf

The following tables explain the prompts you can select when you generate the report, and the metrics and attributes that are represented in the report:

## Prompts for the Transfer Detail Report

Prompt	Description
Pre-set Day Filter	Choose from the convenient list of predefined rolling time ranges, spanning one day or more, over which to run the report.
Start Time	Choose the first day and time from which to gather report data.
End Time	Choose the last day and time from which to gather report data.
Source Handling Resource Name	From the list of active resources configured in your contact center resources, optionally choose the name of a resource on which to report. The <i>source</i> is the resource that initiated a transfer.
Source Handling Resource Type	From the list of active resources configured in your contact center resources, optionally choose the resource type on which to report. The <i>source</i> is the resource that initiated a transfer.
Target Handling Resource Name	From the list of active resources configured in your contact center resources, optionally choose the name of a resource on which to report. The <i>target</i> is the resource that received a transfer.
Target Handling Resource Type	From the list of active resources configured in your contact center resources, optionally choose the resource type on which to report. The <i>target</i> is the resource that received a transfer.
From	From the list, optionally choose a source address on which to focus the report.
То	From the list, optionally choose a target address on which to focus the report.
Media Type	Optionally, select a media type on which to focus the report.
Interaction Type	Optionally, select an interaction type on which to focus the report
Tenant	Optionally, select a tenant on which to focus the report.
Interaction ID	Optionally, select an interaction ID of the INTERACTION_FACT or the INTERACTION_RESOURCE_FACT table on which to focus.

## Attributes used in the Transfer Detail Report

Attribute	Description
Tenant	This attribute enables data within the reporting interval to be organized by tenant.

Attribute	Description
Media Type	Enables data to be organized by the interaction's media type—for example, VOICE, EMAIL, and CHAT.
Interaction ID	This attribute enables data to be organized by the interaction ID of the INTERACTION_FACT or the INTERACTION_RESOURCE_FACT table. For voice interactions, the Interaction ID is the call's connection ID, which is assigned by the telephony server. This ID remains unchanged for as long as the telephony server processes the interaction. For multimedia interactions originating from an Interaction Server, this value is the assigned Interaction ID.  Note: You can click values in the Interaction ID column to automatically open the Interaction Handling Attempt Report to see more detailed information about the handling of that interaction.
Start Timestamp	Enables data to be organized by the moment when the interaction began.
End Timestamp	Enables data to be organized by the moment when the interaction ended.
From	Enables data to be organized by the source address of the interaction.
То	Enables data to be organized by the target address of the interaction.
GUID	Enables data to be organized by the globally unique identifier of the interaction as reported by the interaction media server. This identifier may not be unique. In the case of T-Server voice interactions, the GUID is the Call UUID. In the case of Multimedia, the GUID is the Interaction ID from Interaction Server.
Interaction Handling Attempt ID	Enables data to be organized by the primary key of the INTERACTION_RESOURCE_FACT table.
Interaction Type	Enables data to be organized by the interaction's type—for example, Inbound, Outbound, and Internal.
Handling Attempt Start	Enables data to be organized by the moment when the resource began to participate in the interaction.
Handling Attempt End	Enables data to be organized by the moment when the resource's participation in the interaction ended.
Source Name	Enables data to be organized by the name of the handling resource—for example, the IVR port number; the name of the queue; or the first, last, and user name of the agent.
Source Type	Enables data to be organized by the resource's type—for example, Agent, Queue, and IVRPort.
Source Technical Result	Enables data to be organized by its disposition—its technical result and other aspects of the technical

Attribute	Description
	result—for example, Abandoned, Completed, Diverted, Pulled, and Transferred.
Source Technical Result Reason	Enables data to be organized by the reason for the technical result—for example, AbandonedWhileRinging, AnsweredByAgent, and RouteOnNoAnswer.
Source Technical Result Resource Role	Enables data to be organized by the role that is associated with the resource—for example, Puller, Received, and RoutedTo.
Source Technical Result Role Reason	Enables data to be organized by the reason of the resource role—for example, ConferenceInitiator, ConferenceJoined, and PulledBackTimeout.
Source Service Type	Enables data to be organized by the type of service that was assigned to the interaction.
Source Service Subtype	Enables data to be organized by the detailed type of service that the customer requested.
Source Customer Segment	Enables data to be organized by the configured customer segment.
Source Business Result	Enables data to be organized by the configured business result.
Source Last Queue	Enables data to be organized by the name of the last queue in which the initiated transfer or conference traveled before it was handled. This attribute excludes virtual queues.
Handling Attempt Target Start	Enables data to be organized by the moment when the resource receiving the transfer began to participate in the interaction.
Target Name	Enables data to be organized by the name of the agent, queue, or self-service IVR port that processed the interaction.
Target Type	Enables data to be organized by the resource type—for example, Agent, Queue, and IVRPort.
Target Technical Result	Enables data to be organized by its disposition—its technical result and other aspects of the technical result—for example, Abandoned, Completed, Diverted, Pulled, and Transferred.
Target Technical Result Reason	Enables data to be organized by the reason for the technical result—for example, AbandonedWhileRinging, AnsweredByAgent, and RouteOnNoAnswer.
Target Technical Result Resource Role	Enables data to be organized by the role that is associated with the resource.
Target Technical Result Role Reason	Enables data to be organized by the reason of the resource role.
Target Service Type	Enables data to be organized by the type of service that was assigned to the interaction.
Target Service Subtype	Enables data to be organized by the detailed type

Attribute	Description
	of service that the customer requested.
Target Customer Segment	Enables data to be organized by the configured customer segment.
Target Business Result	Enables data to be organized by the configured business result.
Target Last Queue	Enables data to be organized by the name of the last queue in which the initiated transfer or conference traveled before it was handled. This attribute excludes virtual queues.

## Metrics used in the Transfer Detail Report

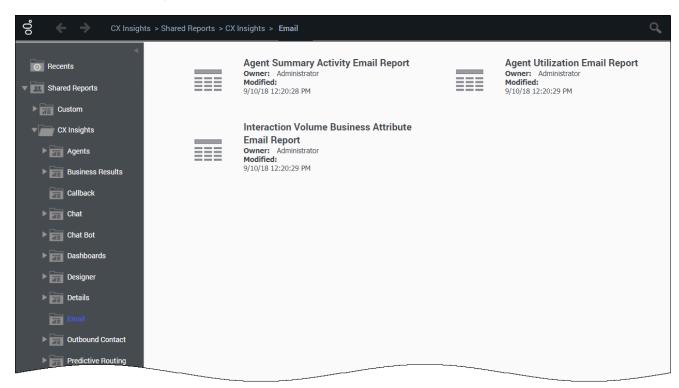
Metric	Description
Interaction Duration	The difference between the start and end timestamps of the interaction.
Source Queue Time (Fmt)	The sum of the durations (HH:MM:SS) that initiated transfers or conferences spent at ACD queue resources prior to arrival at the IRF resource. This duration includes interactions that were queued for consultation and excludes abandoned-while-queued interactions.
Source Customer Engage Time (Fmt)	<ul> <li>The amount of time (HH:MM:SS) that the agent processed a customer-related transfer or conference where the agent was the initiator of the interaction.</li> <li>For synchronous interactions, this is the time that the agent spent interacting with a customer.</li> <li>For asynchronous interactions, this is the time spent handling an inbound interaction from a customer or handling a reply interaction back to the customer.</li> <li>This duration excludes consultations and collaborations.</li> </ul>
Source Customer Hold Time (Fmt)	The amount of time (HH:MM:SS) that the agent had the customer on hold. This metric pertains to transfers or conferences that the agent initiated and excludes hold durations that are associated with consultations.
Source Customer Wrap Time (Fmt)	The amount of time (HH:MM:SS) that the resource was in interaction-related ACW (Wrap) state that pertain to customer transfers or conferences that the agent initiated. The duration excludes ACW duration that is associated with received consultations.
Target Queue Time (Fmt)	The sum of the durations (HH:MM:SS) that received

Metric	Description
	transfers or conferences spent at ACD queue AVAILABLE MEDIA TYPES resources prior to arrival at the IRF resource.
	The amount of time (HH:MM:SS) that the agent spent processing a customer-related transfer or conference where the agent was the recipient of the interaction.
Target Customer Engage Time (Fmt)	<ul> <li>For synchronous interactions, this is the time that the agent spent interacting with a customer.</li> </ul>
	<ul> <li>For asynchronous interactions, this is the time that the agent spent handling an inbound interaction from a customer or handling a reply interaction back to the customer.</li> </ul>
	This duration excludes consultations and collaborations.
Target Customer Hold Time (Fmt)	The amount of time (HH:MM:SS) that the agent had the customer on hold. This metric pertains to transfers or conferences that the agent received and excludes hold durations that are associated with consultations.
Target Customer Wrap Time (Fmt)	The amount of time (HH:MM:SS) that the resource was in interaction-related ACW (Wrap) state that pertain to customer transfers or conferences that the agent received. The duration excludes ACW duration that is associated with received consultations.

## Email reports

This page describes reports you can use to learn more about email interaction volumes, statistics, and outcomes in your contact center. Reports in the **Email** folder are ready-to-use, but as always, can be modified to suit your specific business needs.

#### About Email reports



The following reports / dashboards are available in the **CX Insights** > **Email** folder:

- Agent Summary Activity Email Report
- · Agent Utilization Email Report
- Interaction Volume Business Attribute Email Report

#### **Related Topics:**

- Go back to the complete list of available reports.
- · Learn how to understand and use reports.

• Learn how to create or customize reports.

## Agent Summary Activity Email Report

This page describes how you can use the (**Email** folder >) Agent Summary Activity Email Report to view detailed information about how each agent's active time was used when handling email interactions.

### Understanding the Agent Summary Activity Email Report

				3		ctivity Email					
	Media Type	Agent Name	Day	% Occupancy	Active Time (Fmt)	Ready Time (Fmt)	Not Ready Time (Fmt)	Busy Time (Fmt)	% Ready Time	% Not Ready Time	% Busy Time
		, Agent1 (Agent1)	2011-03-28	0.00%	00:02:24	00:01:53	00:00:31	00:00:00	78.47%	21.53%	0.00
			2010-02-15	65.45%	00:33:05	00:08:58	00:07:08	00:16:59	27.10%	21.56%	51.34
			2010-02-16	23.96%	00:28:42	00:19:09	00:03:31	00:06:02	66.72%	12.25%	21.02
			2010-02-19	46.88%	00:03:26	00:01:08	00:01:18	00:01:00	33.01%	37.86%	29.13
			2010-02-25	42.20%	04:18:13	00:06:07	04:07:38	00:04:28	2.37%	95.90%	1.73
			2010-02-26	100.00%	08:20:06	00:00:00	08:18:29	00:01:37	0.00%	99.68%	0.32
		, MMAgent1 (MMAgent1)	2010-03-01	89.70%	00:12:59	00:01:16	00:00:41	00:11:02	9.76%	5.26%	84.98
			2011-03-28	19.89%	00:42:03	00:07:19	00:32:55	00:01:49	17.40%	78.28%	4.32
			2011-03-29	30.43%	02:09:22	00:04:48	02:02:28	00:02:06	3.71%	94.67%	1.62
			2011-04-04	47.92%	00:45:49	00:23:48	00:00:07	00:21:54	51.95%	0.25%	47.80
			2011-04-06	32.88%	00:01:21	00:00:49	00:00:08	00:00:24	60.49%	9.88%	29.63
			2011-06-30	100.00%	00:08:23	00:00:00	00:05:19	00:03:04	0.00%	63.42%	36.58
			2010-02-15	45.57%	00:28:11	00:12:24	00:05:24	00:10:23	44.00%	19.16%	36.84
			2010-02-16	14.94%	00:16:11	00:10:55	00:03:21	00:01:55	67.46%	20.70%	11.84
			2010-02-19	35.78%	00:04:35	00:02:20	00:00:57	00:01:18	50.91%	20.73%	28.36
			2010-02-25	23.65%	04:20:45	00:03:46	04:15:49	00:01:10	1.44%	98.11%	0.45
			2010-02-26	0.00%	08:26:13	00:00:00	08:26:13	00:00:00	0.00%	100.00%	0.00
t	Email	, MMAgent2	2010-03-01	82.42%	00:09:59	00:01:39	00:00:36	00:07:44	16.53%	6.01%	77.46
		(MMAgent2)	2011-03-28	30.47%	00:37:02	00:03:55	00:31:24	00:01:43	10.58%	84.79%	4.64
			2011-03-29	28.75%	01:48:21	00:03:53	01:42:54	00:01:34	3.58%	94.97%	1.45
			2011-04-04	0.00%	00:04:00	00:03:03	00:00:57	00:00:00	76.25%	23.75%	0.00
			2011-04-05	29.41%	00:01:15	00:00:48	00:00:07	00:00:20	64.00%	9.33%	26.67
			2011-04-06	0.00%	00:02:37	00:00:11	00:02:26	00:00:00	7.01%	92.99%	0.00

This report provides a breakdown of the duration of the different agent states (Ready, Not Ready, Busy, and Other) for a specific media type, fully accounting for the agent's interaction time (time spent handling interactions).

Use this report to understand how much of agent total active time was spent in each state. The report tracks a wide range of metrics, broken down based on both the *amount* and *percentage* of active time spent in each state.

To get a better idea of what this report looks like, view sample output from the report: HRCXIAgentSummaryActivityEmailReport.pdf

The following tables explain the prompts you can select when you generate the report, and the metrics and attributes that are represented in the report:

## Prompts for the Agent Summary Activity Email Report

Prompt	Description
Pre-set Date Filter	Choose from the convenient list of predefined rolling time ranges, spanning one day or more, over which to run the report.
Start Date	Choose the first day from which to gather report data.
End Date	Choose the last day from which to gather report data.
Agent Group	Optionally, select one or more groups from which to gather data for the report.
Agent	Optionally, select one or more agents from which to gather data for the report.
Tenant	For multi-tenant environments, optionally select the tenant(s) for which to include data in the report.

## Attributes used in the Agent Summary Activity Email Report

Attribute	Description
Tenant	This attribute enables data within the reporting interval to be organized by tenant.
Media Type	This attribute enables data to be organized by the interaction's media type—for example, VOICE, EMAIL, and CHAT.
Agent Name	This attribute enables data to be organized by certain attributes of the agent who is associated with the interaction.
Day	This attribute enables data within the reporting interval to be organized by a particular day within a month and year. Day values are presented in YYYY-MM-DD format.

## Metrics used in the Agent Summary Activity Email Report

Metric	Description
% Occupancy	The percentage of time that this agent's state was Busy within the interval, relative to the total duration within the interval of the agent's active session on a particular media channel.  This metric reflects the percentage of time that agents actually spent handling interactions against their available or idle time.

Metric	Description
	This metric is computed as active time minus ready and not- ready time divided by the difference of active and not-ready time.
Active Time (Fmt)	The total amount of time (HH:MM:SS) attributable to the interval between the beginning and end of this agent's login session(s) on a particular media channel. In the scenario in which an agent logs into multiple switches, DNs, and/or queues, this metric starts at the moment at which the agent logs in to the first switch/DN/queue (if this login falls within the interval) and ends at the moment at which the agent is no longer logged in to any switch/ DN/ queue (if logout falls within the interval).  Note: If the agent is not forcibly logged out when the calendar day ends, login duration is split over both days.
Ready Time (Fmt)	The total amount of time (HH:MM:SS) that this agent was in the Ready state for a particular media type.
Not Ready Time (Fmt)	The total amount of time (HH:MM:SS) within the interval that this agent was in the NotReady state for a particular media channel (including Do Not Disturb duration, if configured) regardless of whether a reason was indicated.
Busy Time (Fmt)	The total duration (HH:MM:SS) of all of interaction- processing activities including the time that is associated with requests for consultation that the agent received and excluding the time spent processing after-call work.
% Ready Time	The percentage of time within the interval that this agent's state was Ready, relative to the total duration within the interval of the agent's active session on a particular media channel.
% Not Ready Time	The percentage of time within the interval that this agent's state was NotReady, relative to the total duration within the interval of the agent's active session on a particular media channel.
% Busy Time	The percentage of time of all interaction-processing activities.

## Agent Utilization Email Report

This page describes how you can use the (**Email** folder >) Agent Utilization Email Report to view detailed information about how each agent's active time was used when handling email interactions.

#### Understanding the Agent Utilization Email Report

				Agent Ut	tilization Emai	l Report				
Tenant	Agent Name	Interaction Type	Day	Avg Handle Time (Fmt)	Offered	Accepted	% Accepted	Rejected	Transfer Initiated Agent	% Transfer Initiated Agent
			2010-02-15	00:01:22	7	4	1	2	1	25.00
			2010-02-16	00:01:42	3	3	1	0	1	33.33
			2010-02-19	00:00:04	1	1	1	0	0	0.00
		Inbound	2010-02-25	00:00:54	2	2	1	0	1	50.00
		Inbound	2010-02-26	00:01:24	1	1	1	0	0	0.00
			2011-03-28	00:00:06	4	4	1	0	0	0.00
			2011-03-29	00:00:06	5	4	1	1	0	0.00
	Internal , MMAgent1 (MMAgent1)		2011-04-04	00:10:35	2	2	1	0	0	0.00
		T-11	2010-02-25	00:00:00	0	0	0	0	0	0.00
		Internal	2010-03-01	00:00:00	0	0	0	0	0	0.00
		igent1 gent1)	2010-02-15	00:01:21	7	7	1	0	4	57.14
			2010-02-16	00:00:19	4	4	1	0	2	50.0
			2010-02-19	00:00:25	2	2	1	0	0	0.0
			2010-02-25	00:02:36	1	1	1	0	0	0.0
		Outbound	2010-02-26	00:00:14	1	1	1	0	0	0.0
			2010-03-01	00:05:30	2	2	1	0	0	0.0
vironment			2011-03-28	00:00:18	4	4	1	0	0	0.0
			2011-03-29	00:00:09	4	4	1	0	0	0.0
			2011-04-04	00:00:40	1	1	1	0	0	0.0
			2011-04-06	00:00:24	1	1	1	0	0	0.0
			2011-06-30	00:00:31				0	4	66.6

This report provides details about agent activity when handling email, including, for each agent, the average time to handle an interaction, the number of offered email interactions, the number rejected, and the number and percentage of accepted and transferred interactions.

Use this report to understand each agent's efficiency in handling interactions, and to compare various related metrics for different agents.

To get a better idea of what this report looks like, view sample output from the report: HRCXIAgentUtilizationEmailReport.pdf

The following tables explain the prompts you can select when you generate the report, and the metrics and attributes that are represented in the report:

## Prompts for the Agent Utilization Email Report

Prompt	Description
Pre-set Date Filter	Choose from the convenient list of predefined rolling time ranges, spanning one day or more, over which to run the report.
Start Date	Choose the first day from which to gather report data.
End Date	Choose the last day from which to gather report data.
Agent Group	Optionally, select one or more groups from which to gather data for the report.
Agent	Optionally, select one or more agents from which to gather data for the report.
Interaction Type	Optionally, select the type of interaction to include in the report — for example, Inbound, Internal, or Outbound.
Tenant	For multi-tenant environments, optionally select the tenant(s) for which to include data in the report.

## Attributes used in the Agent Utilization Email Report

Attribute	Description
Tenant	This attribute enables data within the reporting interval to be organized by tenant.
Agent Name	This attribute enables data to be organized by certain attributes of the agent who is associated with the interaction.
Interaction Type	This attribute enables data to be organized by the interaction type—for example, Inbound, Internal, or Outbound.
Day	This attribute enables data within the reporting interval to be organized by a particular day within a month and year. Day values are presented in YYYY-MM-DD format.

## Metrics used in the Agent Utilization Email Report

Metric	Description
Avg Handle Time (Fmt)	The average amount of time (HH:MM:SS) that this agent spent handling interactions that the agent received.

Metric	Description
	This metric is computed as handle time divided by the sum of accepted interactions and received consultations.
	The total number of email interactions that were received or initiated by an agent.
Offered	The count includes interactions that were abandoned while inviting, handling attempts that the agent rejected, and warm consultations and conferences that the agent received. This count excludes simple consultations, whether they were initiated or received. For AG2_AGENT_QUEUE records, this metric relies on the value of the short-abandoned threshold as configured in the [agg-gim-thld-IDIXN] section.
Accepted	The total number of email interactions or warm consultations that were accepted, answered, pulled, or initiated by the agent.
% Accepted	Of the email interactions offered to agents, the percentage that were accepted.
Rejected	The total number of email interactions that alerted at the agent and were not accepted.
Transfer Initiated Agent	The total number of email interactions that agents transferred.
mansier iniciated Agent	Both warm and blind transfers are reflected in this metric.
% Transfer Initiated Agent	The percentage of email interactions that agents transferred.
	Both warm and blind transfers are reflected in this metric.

## Interaction Volume Business Attribute Email Report

This page describes how you can use the (**Email** folder >) Interaction Volume Business Attribute Email Report to understand the Business Result for interactions, to contrast that result against the Service Level and against callers' initial objective, and to understand outcomes in light of various interaction handling metrics.

# Understanding the Interaction Volume Business Attribute Email Report

		"	teraction	Volum	C Dusin	C33 /\tti	ibute it	CPOIT LI	IIGII			
ervice Type	Interaction Type	Day	% First Response Time Service Level	Entered	Accepted	Finished	Finished Response	% Finished Service Level	% Accepted	Max Accept Time Agent (Fmt)	ASA (Fmt)	1
JLT_SERVI YPE	Outbound	2011-06-30	0.00%	1	1	1	0	0.00%	100.00%	00:00:00	00:00:00	
ULT_SERVI YPE	Outbound	2011-06-30	0.00%	1	1	1	0	0.00%	100.00%	00:00:00	00:00:00	
	Inbound	2011-03-29	100.00%	1	1	1	1	0.00%	100.00%	00:00:07	00:00:07	1
	Inbound	2011-03-28	100.00%	1	1	1	1	100.00%	100.00%	00:00:06	00:00:06	
	Inbound	2010-02-16	100.00%	1	1	1	1	0.00%	100.00%	00:00:06	00:00:06	
	Inbound	2010-02-16	100.00%	1	1	1	1	0.00%	100.00%	00:00:07	00:00:07	١
	Inbound	2010-02-19	100.00%	1	1	1	1	100.00%	100.00%	00:00:10	00:00:10	
	Inbound	2010-02-16	100.00%	1	1	1	1	0.00%	100.00%	00:02:07	00:02:07	
	Inbound	2010-02-19	100.00%	1	1	1	1	0.00%	100.00%	00:00:15	00:00:15	
	Outbound	2011-04-05	0.00%	1	0	1	0	100.00%	0.00%	00:00:00	00:00:00	
	Inbound	2011-03-29	100.00%	2	2	2	2	100.00%	100.00%	00:00:06	00:00:05	
	Inbound	2011-04-04	0.00%	1	0	1	0	0.00%	0.00%	00:00:00	00:00:00	
	Inbound	2011-03-29	100.00%	1	1	1	1	100.00%	100.00%	00:00:14	00:00:14	
ULT_SERVI YPE	Outbound	2011-06-30	0.00%	1	1	1	0	0.00%	100.00%	00:00:00	00:00:00	
	Inbound	2011-03-29	100.00%	1	1	1	1	0.00%	100.00%	00:00:06	00:00:06	
	Inbound	2010-02-15	100.00%	1	1	1	1	0.00%	100.00%	00:01:11	00:01:11	
	Inbound	2010-02-25	0.00%	1	1	1	0	100.00%	100.00%	00:00:09	00:00:09	
	Inbound	2011-03-28	100.00%	1	1	1	1	0.00%	100.00%	00:00:07	00:00:07	
	Inbound	2010-02-15	0.00%	1	1	1	0	0.00%	100.00%	00:00:20	00:00:20	Г
	Inbound	2011-04-04	100.00%	1	1	1	1	0.00%	100.00%	00:00:11	00:00:11	
	Inbound	2010-02-15	0.00%	1	1	1	0	0.00%	100.00%	00:00:26	00:00:26	
				1							.00.00	_

This report provides detailed information about how interactions that enter the contact center are categorized into the business-result attributes that are configured in your environment, including analysis (based on the Entered with Objective metric) of the service level within the perspective of the total number of interactions that are offered to resources by day over the reporting interval.

If the business-result classification changes during an interaction, Genesys Info Mart attributes the business result that is in effect when interaction handling ends to the business result that is attached to the interaction. More accurately, the business result that is associated with the interaction at the end of the segment with the first handling resource is attached to the interaction.

If the interaction does not reach a handling resource, the last associated business result is attached to the interaction. Percentages that yield zero (0) values indicate either 0 duration or 0 count. So, for example, % Abandoned Waiting could signify either that no interactions of this business result were abandoned, or that no interactions of this business result entered the contact center at all.

All of the metrics in this report are disposition metrics, which means that interaction total counts are attributed to the interval in which the interaction arrives, and only when interaction processing is complete. Genesys supports customization of the % First Response Time Service Level metric to align its definition with your business.

Use this report to understand the Business Result for interactions, to contrast that result against the Service Level and against callers' initial objective, and to understand outcomes in light of various interaction handling metrics.

To get a better idea of what this report looks like, view sample output from the report:

#### HRCXIInteraction Volume Business Attribute Email.pdf

The following tables explain the prompts you can select when you generate the report, and the metrics and attributes that are represented in the report:

## Prompts for the Interaction Volume Business Attribute Email Report

Prompt	Description
Pre-set Date Filter	From the list, choose a time period on which to report, and move it to the Selected list.
Start Date	Choose the first day from which to gather report data.
End Date	Choose the last day from which to gather report data.
Business Result	Optionally, select a configured Business Result on which to report.
Customer Segment	Optionally, select the customer segment to include in the report.
Service Type	Optionally, select the type of service to include in the report.
Interaction Type	Optionally, select the type of interaction to include in the report—for example, Inbound, Outbound, and Internal.
Tenant	For multi-tenant environments, optionally select the tenant(s) for which to include data in the report.

## Attributes used in the Interaction Volume Business Attribute Email Report

Attribute	Description
Tenant	This attribute enables data within the reporting interval to be organized by tenant.
Media Type	This attribute enables data to be organized by the interaction's media type—for example, VOICE, EMAIL, and CHAT.
Business Result	This attribute enables data to be organized by the configured business result.
Customer Segment	This attribute enables data to be organized by the configured customer segment.
Service Type	This attribute enables data to be organized by the type of service that was assigned to the interaction.
Interaction Type	This attribute enables data to be organized by the interaction's type—for example, Inbound, Outbound, and Internal.
Day	This attribute enables data within the reporting interval to be organized by a particular day within a month and year. Day values are presented in YYYY-MM-DD format.

## Metrics used in the Interaction Volume Business Attribute Email Report

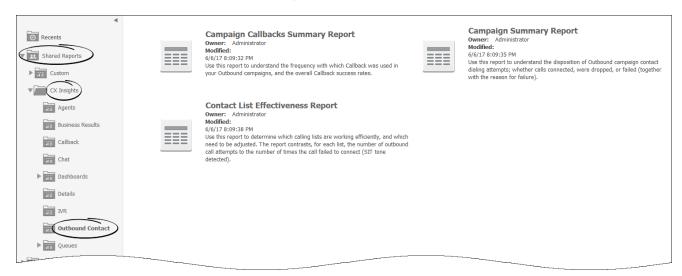
Metric	Description
% First Response Time Service Level	The service level delivered, measured as a percentage of email interactions that were accepted within the configured threshold (which relies on the value of the response threshold, as configured in the agg-gim-thld-ID-IXN section), relative to all email interactions that were offered to handling resources.
Entered	The total number of email interactions that entered or began within the contact center. This count includes abandoned interactions.
Accepted	The total number of email interactions that were accepted, answered, pulled, or initiated by a handling resource.
Finished	The total number of completed email interactions.
Finished Response	The total number of completed email interactions for which a response was created.

Metric	Description
% Finished Service Level	The percentage of email interactions that were completed within the configured threshold. (Relies on the value of the finish threshold as configured in the agg-gim-thld-ID-IXN section.)
% Accepted	The percentage of email interactions that were accepted, relative to the total number that were offered to a handling resource.  This metric relies on the value of the <b>short-abandoned threshold</b> as configured in the agg-gim-thld-ID-IXN section.
Max Accept Time Agent (Fmt)	The longest amount of time (HH:MM:SS) that email interactions spent in a queue before the interactions were accepted by the first handling resource. The duration starts when the interaction enters or begins within the contact center and ends when the interaction is accepted. This metric includes alert (ring) time.
ASA (Fmt)	The average amount of time (HH:MM:SS) it took agents to accept, answer, or pull email interactions.
Avg Handle Time (Fmt)	The average amount of time (HH:MM:SS) that agents spent handling email interactions.
Avg Finish Response Time (Fmt)	The average duration, (HH:MM:SS) of completed email interactions that had a response by a handling resource. This duration includes the entire lifespan of the interaction including processing, queueing, and handling.
Transfer Initiated Agent	The total number of email interactions that agents transferred.  Both warm and blind transfers are reflected in this metric.
% Transfer Initiated Agent	The percentage of email interactions that agents transferred.  Both warm and blind transfers are reflected in this metric.

## Outbound Contact reports

This page describes reports you can use to view historical information about outbound campaigns running in your contact center (outbound engagement). Reports in the **Outbound Contact** folder are ready-to-use, but as always, can be modified to suit your specific business needs.

#### About Outbound Contact reports



The following reports are available in the CX Insights > Outbound Contact folder:

- · Campaign Callbacks Summary Report
- Campaign Summary Report
- Contact List Effectiveness Report

#### **Related Topics**:

- Go back to the complete list of available reports.
- Learn how to understand and use reports.
- · Learn how to create or customize reports.

## Campaign Callbacks Summary Report

This page describes how you can use the (**Outbound Contact** folder) Campaign Callbacks Summary Report to learn more about the utilization of Callback in your campaign.

#### Understanding the Campaign Callbacks Summary Report

Campaign Callbacks Summary Report									
Tenant	Campaign	Day	Callbacks Completed	Callbacks Missed	Callbacks Scheduled	Personal Callbacks Completed	Personal Callbacks Missed	Personal Callbacks Scheduled	
	C_2275.June_1_1.1550C7CA95714B38F0A140172000000000000	2016-06-01	0	0	0	0	0	0	
	C_2275.June_1_2.1550C88360A14C6100A140172000000000000	2016-06-01	0	0	0	0	0	0	
Environment	C_2275.May_25_1.154E7F0364D5B51430A140172000000000000	2016-05-25	0	0	0	0	0	0	
	C_2275.May_27_1.154F21604BC0C07550A140172000000000000	2016-05-27	0	0	0	0	0	0	
	Total		0	0	0	0	0	0	
Total					0_	0	0	0	

This report displays a summary of information about callback activity, including the total number of callbacks processed by the contact center, broken down into the total number scheduled, missed, and completed for each day of the reporting period. Personal callbacks are distinguished from nonpersonal ones. The report's design internally filters the dataset to return Outbound voice-only interactions.

Use this report to understand the frequency with which Callback was used in your Outbound campaigns, and the overall Callback success rates.

To get a better idea of what this report looks like, view sample output from the report: HRCXICampaignCallbacksSummaryReport.pdf

The following tables explain the prompts you can select when you generate the report, and the metrics and attributes that are represented in the report:

#### Prompts for the Campaign Callbacks Summary Report

Prompt	Description
Pre-set Date Filter	From the list, choose a time period on which to report, and move it to the Selected list.
Start Date	Choose the first day from which to gather report data.
End Date	Choose the last day from which to gather report data.

Prompt	Description
Campaign	Optionally, select one or more campaigns from which to gather data for the report.
Tenant	For multi-tenant environments, optionally select the tenant(s) for which to include data in the report.

## Attributes used in the Campaign Callbacks Summary Report

Attribute	Description
Tenant	This attribute enables data within the reporting interval to be organized by tenant.
Campaign	This attribute enables data to be organized by the name of the outbound campaign.
Day	This attribute enables data within the reporting interval to be organized by a particular day within a month and year. Day values are presented in YYYY-MM-DD format.

## Metrics used in the Campaign Callbacks Summary Report

Metric	Description
Callbacks Completed	The total number of times attributed to the reporting interval that campaign callbacks were completed by an agent, excluding missed callbacks. This metric includes callbacks that were scheduled by agents.
Callbacks Missed	The total number of times attributed to the reporting interval that campaign callbacks were missed.
Callbacks Scheduled	The total number of times (attributed to the reporting interval) that a call treatment scheduled callback contact attempts from this campaign. This metric does not include callbacks scheduled by agents.
Personal Callbacks Completed	The total number of times attributed to the interval that callbacks were completed by the agent who requested them for contact attempts made from this campaign, excluding missed callbacks. This metric includes personal callbacks that were scheduled by agents.
Personal Callbacks Missed	The total number of times attributed to the interval that callbacks were missed by the agent who requested them for contact attempts made from this campaign.

Metric	Description
Personal Callbacks Scheduled	The total number of times attributed to the interval that a call treatment scheduled personal callback contact attempts from this campaign. This metric does not include callbacks personal scheduled by agents.

## Campaign Summary Report

This page describes how you can use the (**Outbound Contact** folder) Campaign Summary Report to learn more about the overall progress of your campaign.

#### Understanding the Campaign Summary Report

Campaign Summary Report										
Tenant	Campaign	Day	Attempts	Accepted	Not Accepted	Abandoned Waiting	Busy Campaign	No Signal	Dial Dropped	Ans
Environment	C_2275.June_1_1.1550C7CA95714B38F0A14017200000000000	2016-06-01	3	0	0	2	0	0	0	
	C_2275.June_1_2.1550C88360A14C6100A14017200000000000	2016-06-01	1	1	0	0	0	0	0	
	C_2275.May_25_1.154E7F0364D5B51430A14017200000000000	2016-05-25	2	2	0	0	0	0	0	
	C_2275.May_27_1.154F21604BC0C07550A14017200000000000	2016-05-27	1	1	0	0	0	0	0	/
	Total		7	4	0	2	0	0	0	
						2	0	0	0	

_	mpa	aign S	umma	ry Re	port							
(5)	Accepted	Not Accepted	Abandoned Waiting	Busy Campaign	No Signal	Dial Dropped	Answering Machine Detected	Fax Modem Detected	Overdial	Avg CPD Dial Time (Fmt)	Avg CPD Transfer Time (Fmt)	Avg CPD Time (Fmt)
1	0	0	2	0	0	0	1	0	2	00:12.420	00:00.000	00:01.521
	1	0	0	0	0	0	0	0	1	00:13.285	00:03.713	00:02.057
,	2	0	0	0	0	0	0	0	2	00:11.538	00:04.553	00:02.606
/	1	0	0	0	0	0	0	0	1	00:14.932	00:05.109	00:02.020
7	4	0	2	0	0	0	1	0	6	00:12.650	00:04.458	00:02.055
				0	0	0				12,650	00:04.458	00:02.055

This report summarizes key metrics, such as Accepted and Not Accepted, that illustrate the disposition of contact attempts associated with Outbound campaigns. The report also examines call-progress detection (CPD) efficiency. The report internally filters the dataset to return Outbound voice-only interactions.

Use this report to understand the disposition of Outbound campaign contact dialing attempts; whether calls connected, were dropped, or failed (together with the reason for failure).

To get a better idea of what this report looks like, view sample output from the report: HRCXICampaignSummaryReport.pdf

The following tables explain the prompts you can select when you generate the report, and the metrics and attributes that are represented in the report:

## Prompts for the Campaign Summary Report

Prompt	Description
Pre-set Date Filter	From the list, choose a time period on which to report, and move it to the Selected list.
Start Date	Choose the first day from which to gather report data.
End Date	Choose the last day from which to gather report data.
Campaign	Optionally, select a campaign on which to report.
Tenant	For multi-tenant environments, optionally select the tenant(s) for which to include data in the report.

## Attributes used in the Campaign Summary Report

Attribute	Description
Tenant	This attribute enables data within the reporting interval to be organized by tenant.
Campaign	This attribute enables data to be organized by the name of the outbound campaign.
Day	This attribute enables data within the reporting interval to be organized by a particular day within a month and year. Day values are presented in YYYY-MM-DD format.

## Metrics used in the Campaign Summary Report

Metric	Description
Attempts	The total number of contact attempts that the Outbound Contact Server processed for this campaign regardless of the disposition of each attempt or how the attempt was initiated.
Accepted	The total number of times attributed to the interval that contact attempts from this campaign returned an answered call result (CALL_RESULT_CODE='ANSWERED').
Not Accepted	The total number of times attributed to the interval that the call result of contact attempts from this campaign was No Answer (CALL_RESULT_CODE='NO_ANSWER').
Abandoned Waiting	The total number of times attributed to the reporting interval that contact attempts from this

Metric	Description
	campaign returned an abandoned call result (CALL_RESULT_CODE='ABANDONED').
Busy Campaign	The total number of times attributed to the reporting interval that contact attempts from this campaign returned a busy call result (CALL_RESULT_CODE='BUSY').
No Signal	The total number of times attributed to the interval that the call result of contact attempts from this campaign was Wrong Party—the right person was not contacted (CALL_RESULT_CODE='WRONG_PARTY').
Dial Dropped	The total number of times attributed to the interval that the system detected a call drop during contact attempts made from this campaign (CALL_RESULT_CODE='CALL_DROP_ERROR').
Answering Machine Detected	The total number of times attributed to the reporting interval that the system detected an answering machine for contact attempts from this campaign (CALL_RESULT_CODE= 'ANSWERING_MACHINE_DETECTED').
Fax Modem Detected	The total number of times attributed to the interval that the system detected a fax machine for contact attempts made by this campaign (CALL_RESULT_CODE='FAX_DETECTED').
Overdial	The total number of CPD dials that were abandoned or were answered by the called party but not established with an agent or IVR within two seconds of the dialing event.
Avg CPD Dial Time (Ms)	The average dial duration (MM:SS:milliseconds) of OCS-initiated calls. Average dial duration for established calls is available only when the CPD Server is used for dialing.
Avg CPD Transfer TIme (Ms)	The average amount of time (MM:SS:milliseconds) of CPD transfers completed during the reporting interval.
Avg CPD Time (Ms)	The average amount of time (MM:SS:milliseconds) of call-progress detection for contact attempts initiated during this reporting interval.

## Contact List Effectiveness Report

This page describes how you can use the (**Outbound Contact** folder) Contact List Effectiveness Report to see detailed information about the success rates of your contact lists, focusing on the frequency of SIT detection.

#### Understanding the Contact List Effectiveness Report

Contact List Effectiveness Report												
Tenant	Contact List	Day	SIT Ratio	Attempts	All SIT	SIT Detected	SIT Invalid Number	SIT No Circuit	SIT Operator Intercept	SIT Reorder	SIT Unknown	SIT Vacant
	gsw_calling_list	2016-05-25	0.00%	2	0	0	0	0	0	0	0	0
		2016-05-27	0.00%	1	0	0	0	0	0	0	0	0
Environment		2016-06-01	0.00%	4	0	0	0	0	0	0	0	0
	Total		0.00%	7	0	0	0	0	0	0	0	0
			0.00%	7	0				<u>-</u>	0	0	

This report provides detailed information about the number of contact attempts that were generated by an Outbound campaign, the ratio of attempts that resulted in the detection of a special information tone (SIT), and a breakdown of the call results of those SIT-detected attempts for the selected calling list. The report internally filters the dataset to return Outbound voice only interactions.

Use this report to determine which calling lists are working efficiently, and which need to be adjusted. The report contrasts, for each list, the number of outbound call attempts to the number of times the call failed to connect (a SIT tone was detected).

To get a better idea of what this report looks like, view sample output from the report: HRCXIContactListEffectivenessReport.pdf

The following tables explain the prompts you can select when you generate the report, and the metrics and attributes that are represented in the report:

#### Prompts for the Contact List Effectiveness Report

Prompt	Description
Pre-set Date Filter	From the list, choose a time period on which to report, and move it to the Selected list.
Start Date	Choose the first day from which to gather report data.

Prompt	Description
End Date	Choose the last day from which to gather report data.
Contact List	Optionally, select a contact list on which to report.
Tenant	For multi-tenant environments, optionally select the tenant(s) for which to include data in the report.

#### Attributes used in the Contact List Effectiveness Report

Attribute	Description
Tenant	This attribute enables data within the reporting interval to be organized by tenant.
Contact List	This attribute enables data to be organized by the contact list (that is, the calling list) that was used to run outbound campaigns.
Day	This attribute enables data within the reporting interval to be organized by a particular day within a month and year. Day values are presented in YYYY-MM-DD format.

#### Metrics used in the Contact List Effectiveness Report

Many of the metrics used in the report pertain to special information tone (SIT) detection. For all metrics in this report, the determination of SIT values depends on the underlying signaling lines, capabilities of the CPD Server, and the dialer, which maps SIT classifications to Genesys enumeration. Refer to the Genesys Outbound Contact documentation for more information.

Metric	Description
SIT Ratio	The ratio of contact attempts that resulted in SIT detection to the total number of contact attempts generated by a specific calling list from this campaign.
Attempts	The total number of contact attempts that the Outbound Contact Server processed for this campaign regardless of the disposition of each attempt or how the attempt was initiated.
All SIT	The sum of all contact-attempt SIT metrics for which the call result was one of the following:  • SIT_INVALID_NUMBER

Metric	Description
	<ul><li>SIT_NC</li><li>SIT_IC</li><li>SIT_RO</li><li>SIT_VC</li><li>SIT_DETECTED</li><li>SIT_UNKNOWN_CALL_STATE</li></ul>
SIT Detected	The total number of times attributed to the interval that the system detected a special information tone for contact attempts made from a specific calling list from this campaign (CALL_RESULT_CODE='SIT_DETECTED'). A count of either 0 or 1 is attributed to this metric's value for each contact attempt.
SIT Invalid Number	The total number of times attributed to the interval that the system detected a special information tone that indicated an invalid number for contact attempts made from a specific calling list from this campaign (CALL_RESULT_CODE='SIT_INVALID_NUMBER'). A count of either 0 or 1 is attributed to this metric's value for each contact attempt.
SIT No Circuit	The total number of times attributed to the interval that the system detected a special information tone indicating that all circuits were busy for contact attempts made from a specific calling list from this campaign (CALL_RESULT_CODE='SIT_NC'). A count of either 0 or 1 is attributed to this metric's value for each contact attempt.
SIT Operator Intercept	The total number of times attributed to the interval that the system detected a special information tone indicating that the dialed number either had been changed or disconnected for contact attempts made from a specific calling list from this campaign (CALL_RESULT_CODE='SIT_IC'). A count of either 0 or 1 is attributed to this metric's value for each contact attempt.
SIT Reorder	The total number of times attributed to the interval that the system detected a special information tone indicating incomplete digits, internal office, feature failure, call failure, no wink, or partial digits received for contact attempts made from a specific calling list from this campaign (CALL_RESULT_CODE='SIT_RO'). A count of either 0 or 1 is attributed to this metric's value for each contact attempt.
SIT Unknown	The total number of times attributed to the interval that the system detected an unknown special

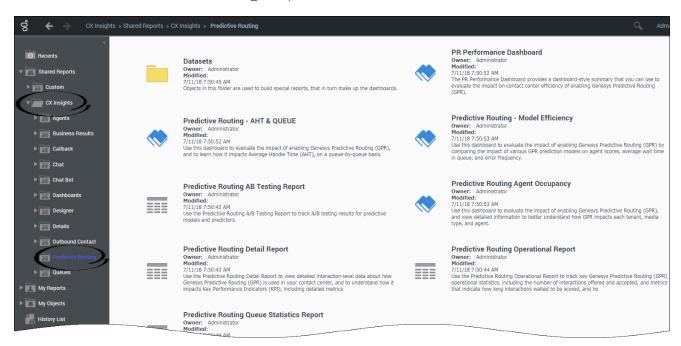
Metric	Description
	information tone for contact attempts made from a specific calling list from this campaign (CALL_RESULT_CODE='SIT_UNKNOWN_CALL_STATE'). A count of either 0 or 1 is attributed to this metric's value for each contact attempt.
SIT Vacant	The total number of times attributed to the interval that the system detected a special information tone indicating an N11 code, a class code, or a prefix for contact attempts made from a specific calling list from this campaign (CALL_RESULT_CODE='SIT_VC'). A count of either 0 or 1 is attributed to this metric's value for each contact attempt.

## Predictive Routing Reports and Dashboards

This page describes reports and dashboards you can use to learn more about how Genesys Predictive Routing (GPR) is used in your contact center, including information about how it impacts customer experience, wait times, issue resolution rates, and other key metrics. Reports in the **Predictive** folder are ready-to-use, but as always, can be modified to suit your specific business needs.

Reports in this folder require that specific RAA options be enabled: enable-gpr, and in some cases enable-gpr-fcr. For more information, see the *Genesys CX Insights Deployment Guide*.

#### About Predictive Routing reports and dashboards



The following reports and dashboards are available in the **CX Insights** > **Predictive Routing** folder:

- Predictive Routing AHT & Queue Dashboard
- Predictive Routing Model Efficiency Dashboard
- Predictive Routing A/B Testing Report
- Predictive Routing Agent Occupancy Dashboard
- Predictive Routing Detail Report
- Predictive Routing Operational Report
- Predictive Routing Queue Statistics Report

#### Related Topics:

- Go back to the complete list of available reports.
- Learn how to understand and use reports.
- Learn how to create or customize reports.

# Predictive Routing - AHT & Queue Dashboard

This page describes how you can use the (**Predictive Routing** folder) AHT & Queue Dashboard to understand the impact on contact center efficiency of enabling Genesys Predictive Routing (GPR).

Note that the term 'dashboard' is used interchangeably with the term 'dossier'. Dashboards / dossiers provide an interactive, intuitive data visualization, summarizing key business indicators (KPIs). You can change how you view the data by using interactive features such as selectors, grouping, widgets, and visualizations, and explore data using multiple paths, though text, data filtering, and layers of organization.

This report requires that specific RAA options be enabled: enable-gpr and enable-gpr-fcr. For more information, see the *Genesys CX Insights Deployment Guide*.

#### Video: AHT & Queue Dashboard

#### Link to video

This video describes how to use the AHT & Oueue Dashboard.

#### Understanding the AHT & Queue Dashboard

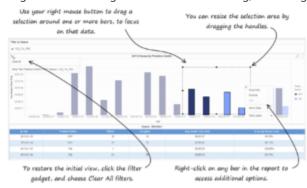


The AHT tab

The **Predictive Routing - AHT & Queue** Dashboard provides a dashboard-style summary that you can use to evaluate the impact on contact center efficiency of enabling Genesys Predictive Routing (GPR). The dashboard provides tools that allow you to compare how various metrics change when GPR is enabled.

The Predictive Routing - AHT & Queue Dashboard contains two tabs:

- The AHT tab This tab provides detailed information about Average Handle Time (AHT) and related metrics. The AHT dashboard is divided into three sections:
  - The top part of the dashboard shows side-by-side comparisons of key metrics (Accepted and Average Handle Time); the values on the left represent the result of having GPR on, while on the right, you can see the result of turning it off.
  - The middle part of the dashboard shows the Average Handle Time, broken down by day, contrasting the result of enabling/disabling GPR (the light-colored bars represent data collected when GPR was enabled, while the dark bars represent data collected when GPR was disabled). The higher the bar, the longer the handle time was on the indicated day.
  - The bottom part of the dashboard breaks down Average Handle Time on an hour-by-hour basis, and once again contrasting the result of enabling/disabling GPR.



Navigating the Dashboard

Initially, the entire reporting period is presented in this part of the dashboard, but you can filter to focus on a single day, or a range of days: In the middle part of the dashboard, select one or more days (click the bar in the graph, or click and drag to select more than one); the bottom part of the dashboard updates to show the hourly trends for those days.

• The Queue tab — This tab allows you to easily compare the Average Handle Time with Predicitve Switching on/off per queue; here you will see the same kind of information that appears on the AHT tab, but here it is organized by Queue. The Queue tab is useful if you find an unsatisfactory AHT — for example, if AHT seems higher with Predictive Switching turned on — you can use the Queue tab to see if a particular queue is the source of the problem.

To get a better idea of what this dashboard looks like, view sample output from the report: Sample Predictive Routing — AHT & Queue Dashboard.pdf

The following table explains the prompts you can select when you generate the Predictive Routing - AHT & Queue Dashboard:

Prompt	Description	
Pre-set Date Filter	Choose a date from the list of preset options. If this prompt is set to anything other than <b>none</b> , the Report Date prompt is ignored. Default: <b>Year to Date</b>	
Start Date	Choose the first date on which to report. This prompt has no effect if Pre-set Date Filter is set to anything other than <b>none</b> .	
End Date	Choose the last date on which to report. This	

#### Prompts on the Predictive Routing - AHT & Queue Dashboard

	prompt has no effect if Pre-set Date Filter is set to anything other than <b>none</b> .
Queue	Select one or more queues to include in the report.
Media Type	Select one or more media types for which to gather data into the report.
Predictor	Select one or more predictors to include in the report.
Model	Select one or more prediction models to include in the report.
Tenant	Select one or more tenants to include in the report.

#### AHT tab

The following table explains the attributes used on the AHT tab:

#### Attributes on the PR Performance Dashboard / AHT tab

Attribute	Description
Day	Enables the organization of data based on the day/ date on which the interaction occurred.
Hour	Enables the organization of data based on the hour at which the interaction occurred.
Predictor Switch	Enables the organization of data based on whether predictive routing is ON or OFF.

The following table explains the metrics used on the AHT tab:

#### Metrics on the PR Performance Dashboard / AHT tab

Metrics	Description
Accepted	Total number of calls that were accepted.
Avg Handle Time	The average amount of time that agents spent handling each interaction.

#### Queue tab

The following table explains the attributes used on the Queue tab:

#### Attributes on the PR Performance Dashboard / Queue tab

Attribute	Description
Day	Enables the organization of data based on the day/ date on which the interaction occurred.
Predictor Switch	Enables the organization of data based on whether predictive routing is ON or OFF.

Queue	Enables the organization of data by queue.
	, , , , , , , , , , , , , , , , , , ,

The following table explains the metrics used on the Queue tab:

#### Metrics on the PR Performance Dashboard / Queue tab

Metrics	Description
Accepted	The total number of customer interactions and warm consultations that were accepted, answered, or pulled by an agent, voice-treatment port, IVR port, or nonagent-associated DN (such as contact center resources that can alert) within the reporting interval.
AHT of Queue by Predictor Switch	The Average Handle Time for interactions in the selected queue, where dark blue bars capture information about interactions that completed while Predictor Switch was On, and light blue bars capture information about interactions that completed while Predictor Switch was Off.
Offered	The total number of customer interactions that entered or began within the contact center during the reporting interval, and were offered to a resource, excluding interactions that were abandoned within the short-abandoned threshold.
Avg Handle Time	The average amount of time (HH:MM:SS), within the reporting interval, that agents spent handling received interactions. Computed as handle time divided by the sum of accepted interactions and received consultations.
% Accept Service Level	The service level, measured as a percentage of interactions that entered this tenant and were accepted within a user-defined threshold, relative to all interactions that entered this tenant and were offered to a resource.

# Predictive Routing - Model Efficiency Dashboard

This page describes how you can use the Model Efficiency Dashboard to see detailed information about the impact on contact center efficiency of enabling Genesys Predictive Routing (GPR), and compare the effectiveness of various GPR prediction models.

Note that the term 'dashboard' is used interchangeably with the term 'dossier'. Dashboards / dossiers provide an interactive, intuitive data visualization, summarizing key business indicators (KPIs). You can change how you view the data by using interactive features such as selectors, grouping, widgets, and visualizations, and explore data using multiple paths, though text, data filtering, and layers of organization.

### Video: Introducing the Model Efficiency Dashboard

#### Link to video

This video describes how to use the Model Efficiency Dashboard.

### Understanding the Model Efficiency Dashboard



Predictive Routing — Model Efficiency Dashboard

The Predictive Routing — Model Efficiency Dashboard provides a bubble-graph summary that you can use to evaluate the impact on contact center efficiency of enabling GPR, and compare the effectiveness of various GPR prediction models. The dashboard includes graphical summaries of average agent scores, average time interactions waited in queue before being scored by Predictive Routing and distributed, and the percentage of interactions that encountered an error during Predictive Routing.

To help you understand the graph:

• The larger the bubble on the graph, the more calls were accepted.

- The color of the bubble indicates whether GPR was on or off.
- The higher the bubble is on the vertical axis, the higher the average agent score.



Navigating the Model Efficiency Dashboard

This design allows you to see, at a glance, how evenly calls are distributed, relative to agent score. If you find that a large number of calls are being routed to the agents with the best scores, and very few calls to other agents, you may want to adjust the routing model.

To get a better idea of what this dashboard looks like, view sample output from the report: Sample Predictive Routing — Model Efficiency Dashboard.pdf

The following table explains the prompts you can select when you generate the Predictive Routing - Model Efficiency Dashboard:

#### **Prompts on the Predictive Routing - Model Efficiency Dashboard**

Prompt	Description
Pre-set Date Filter	Choose a date from the list of preset options. If this prompt is set to anything other than <b>none</b> , the Report Date prompt is ignored. Default: <b>Year-to-Date</b> .
Start Date	Choose the first date on which to report. This prompt has no effect if Pre-set Date Filter is set to anything other than <b>none</b> .
End Date	Choose the last date on which to report. This prompt has no effect if Pre-set Date Filter is set to anything other than <b>none</b> .
Media Type	Select one or more media types for which to gather data into the report.
Predictor	Select one or more predictors to include in the report.
Model	Select one or more prediction models to include in the report.
Tenant	Select one or more tenants to include in the report.

The following table explains the attributes used on the Predictive Routing - Model Efficiency Dashboard:

#### Attributes on the Predictive Routing - Model Efficiency Dashboard

Attribute	Description
Day	Enables the organization of data based on the day/date on which the interaction occurred.
Predictor Switch	Enables the organization of data based on whether Predictive Routing is ON, OFF, or for which an error occurred.

The following table explains the metrics used on the Predictive Routing - Model Efficiency Dashboard:

#### **Metrics on the Predictive Routing - Model Efficiency Dashboard**

Metric	Description
% Error	Percentage of active interactions that received a Predictive Routing error score.
Accepted	Total number of calls accepted.
Avg Agent Score	The sum of all Agent Scores (gpmAgentScore), divided by the total number of interactions where GPR was active.
Average Accept Time	The average amount of time, in seconds, it took agents to accept, answer, or pull customer interactions.

# Predictive Routing A/B Testing Report



Predictive Routing A/B Testing Report

Use the **Predictive Routing A/B Testing Report** to compare results for predictive models and predictors based on time-sliced A/B testing. This report includes a First Contact Resolution Rate calculation, which allows you to quickly see how often customer concerns were resolved on the first attempt, and allows you to contrast interactions that were processed when Predictive Routing was switched ON compared to when it was OFF. The report also profiles response time, engage time, wrap time, and other relevant Key Performance Indicators (KPI).

This report requires that specific RAA options be enabled: enable-gpr and enable-gpr-fcr. For more information, see the *Genesys CX Insights Deployment Guide*.

To get a better idea of what this report looks like, view sample output from the report: Sample Predictive Routing ABTesting Report.pdf

The following tables explain the prompts, attributes, and metrics used in this report:

#### Prompts in the Predictive Routing A/B Testing Report

Prompt	Description
Pre-set Date Filter	Choose a date from the list of preset options. This prompt overrides the Start Time and End Time values. Default: Year to Date
Start Date	Choose the day and time from which to begin collecting data into the report. This prompt has no effect if Pre-set Date Filter is set to anything except <b>None</b> .
End Date	Choose the day and time at which to stop collecting data into the report.
Media Type	Select one or more media types for which to gather data into the report.
Predictor	Select one or more predictors for which to gather data into the report.
Model	Select one or more models for which to gather data into the report.
Tenant	Select one or more tenants to include in the report.

#### Attributes in the Predictive Routing A/B Testing Report

Attribute	Description
Tenant	Enables the organization of data by tenant.
Media Type	Enables the organization of data by media type.
Day	Enables the organization of data by the day/date on which the interaction occurred.
Predictor Switch	Enables the organization of data by whether predictive routing is ON or OFF.
Predictor	Enables the organization of data by the identifier for the predictor that was used to request scoring for predictive routing.
Model	Enables the organization of data by the identifier for the model that was used to calculate agent scores for predictive routing.
Result	The result of Predictive Routing processing. If there is an error, this metric displays the error message (gpmMessage) as a value between 1 and 15.  1 - Ok  1 - Ok  2 -  Authentication to scoring engine failed  3 - Scoring request failed  4 - Agent list is empty  5 - URS overload, interaction skipped  6 - Predictor not found  7 - Failed to  1 - Ok  build supported scoring request  8 -  Reserved for future use for future use for future use  8 -  Reserved for future use  9 -  SetReadyCondition 3 - Call Routing  Failed  10 -  Unknown error  11 - Channel  is not

#### Metrics in the Predictive Routing A/B Testing Report

Metric	Description
Offered	The total number of customer interactions that entered or began within the contact center during the reporting interval, and were offered to a resource, excluding interactions that were abandoned within the short-abandoned threshold.
Accepted	The total number that customer interactions and warm consultations that were accepted, answered, or pulled by an agent, voice-treatment port, IVR port, or nonagent-associated DN (such as contact center resources that can alert) within the

	reporting interval.
Avg Handle Time (Fmt)	The average amount of time (HH:MM:SS), within the reporting interval, that this agent spent handling interactions that the agent received. Computed as handle time divided by the sum of accepted interactions and received consultations.
First Contact Resolution Result	First Contact Resolution (FCR) measures whether issues were resolved during the first customer attempt. A value of NO indicates that the customer raised the same issue again within 7 days.  The logic for calculating FCR is as follows:  Interaction data is retrieved from the INTERACTION_FACT table for 7 and 35 days, leveraging the START_DATE_TIME_KEY column.  The interactions are grouped based on the value of CUSTOMER_ID and SERVICE_TYPE user data for each interaction.  If the number of interactions within the reporting interval for a given CUSTOMER_ID and SERVICE_TYPE combination is more than 1, then FCR=NO.  The FCR result for each interaction is stored in a separate table (FCR_ID).
ASA (Fmt)	The average amount of time (HH:MM:SS), within the reporting interval, that it took agents to accept, answer, or pull customer interactions
Avg Wrap Time (Fmt)	The average amount of time (HH:MM:SS), within the reporting interval, that this agent spent on customer interactions while in ACW (Wrap) state.
Avg Engage Time (Fmt)	The average amount of time (HH:MM:SS), within the reporting interval, that this agent was engaged with customers on interactions.
Avg Hold Time (Fmt)	The average number of seconds, within the reporting interval, that customers spent on hold for interactions. This metric is attributed to the interval in which the interactions were accepted by a resource.
Transfer Rate	The percentage of interactions that were transferred. Calculated as the total number of transferred interactions divided by the total number of interactions.

# Predictive Routing Agent Occupancy Dashboard

This page describes how you can use the Agent Occupancy Dashboard to see detailed information about the impact on contact center efficiency of enabling Genesys Predictive Routing (GPR).

Note that the term 'dashboard' is used interchangeably with the term 'dossier'. Dashboards / dossiers provide an interactive, intuitive data visualization, summarizing key business indicators (KPIs). You can change how you view the data by using interactive features such as selectors, grouping, widgets, and visualizations, and explore data using multiple paths, though text, data filtering, and layers of organization.

### Video: Introducing the Agent Occupancy Dashboard

#### Link to video

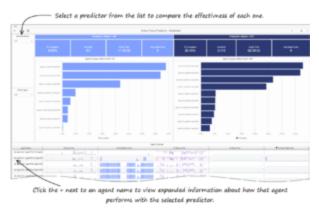
This video describes how to use the Agent Occupancy Dashboard.

### Understanding the Agent Occupancy Dashboard



The Predictive Routing - Agent Occupancy Dashboard

The Predictive Routing Agent Occupancy Dashboard provides a summary that you can use to evaluate the impact on contact center efficiency of enabling GPR.



Navigating the Agent Occupancy Dashboard

The report includes three tabs:

- Active Time and Predictive Provides an interactive visual overview of Active Agent Time with and
  without Predictive Routing. The metrics displayed at the top of the dashboard can help you understand
  how GPR impacts your contact center: compare the values on the left (GPR on) to those on the right
  (GRP off), and select various predictors from the list on the left, to see the performance of each.
  At the bottom of the dashboard, you can also see detailed information about agents these
  metrics are not impacted by GPR. Click the + next to an agent name to see detailed information
  for that agent.
- Details: Active Time and Predictive Provides a grid where you can view detailed Active Time data, and organize it by various attributes, to better understand how Predictive Routing impacts each tenant, media type, and agent.
- Details: Interaction Time Provides a grid where you can view a variety of metrics describing
  interaction time, to learn how Predictive Routing impacts each one.
  You can organize the grid based on various attributes, to better understand how Predictive Routing
  impacts each tenant, media type, and agent.

To get a better idea what this dashboard looks like, view sample output from the report: Sample Predictive Routing Agent Occupancy Dashboard.pdf

The following table explains the prompts you can select when you generate the Predictive Routing Agent Occupancy Dashboard:

#### **Prompts on the Predictive Routing Agent Occupancy Dashboard**

Prompt	Description
Pre-set Day Filter	Choose a date from the list of preset options. If this prompt is set to anything other than <b>none</b> , the Report Date prompt is ignored.
Report Date	Select the day for which to generate a report.
Agent	Optionally, restrict the report to show information about specific agents.
Agent Group	Optionally, restrict the report to show information about specific groups.
Media Type	Optionally, restrict the report to show information about specific media types.

Interaction Type	Optionally, restrict the report to show information about specific interaction types.
Model	Optionally, restrict the report to show information about specific prediction models.
Predictor	Optionally, restrict the report to show information about specific predictors.
Tenant	Optionally, restrict the report to show information about specific tenants.

### Active Time & Predictive tab

The following table explains the attributes used on the Active Time & Predictive tab:

#### **Attributes on the Active Time & Predictive tab**

Attribute	Description
Predictor	Enables the organization of data based on what predictor was used.
Agent	Enables the organization of data by agent.

The following table explain the metrics used on the Active Time & Predictive tab:

#### **Metrics on the Active Time & Predictive tab**

Metric	Description
% Occupancy	The percentage of time within the reporting interval that this agent's state was Busy, relative to the total duration within the interval of the agent's active session on a particular media channel. This metric reflects the percentage of time that agents actually spent handling interactions against their available or idle time. This metric is computed as (active time minus ready and not-ready time) divided by (active time minus not-ready time).
Accepted	The total number of times, within the reporting interval, that customer interactions and warm consultations were accepted, answered, or pulled by an agent, voice-treatment port, IVR port, or nonagent-associated DN (such as contact center resources that can alert).
Active Time	The total amount of time attributable to the interval between the beginning and end of this agent's login session(s) on a particular media channel.
% Busy Time	The percentage of time spent by agent on interaction processing activities during a day (login-logout).
% Not Ready Time	The percentage of time within the interval that this agent's state was in the NotReady state.

% Ready Time	The percentage of time within the interval that this agent's state was in the Ready state.
% Wrap Time	The percentage of time that this agent spent in ACW.
% Other State Time	The percentage of the agent's time spent in a state other than those listed in the report.

### Details: Active Time & Predictive tab

The following table explains the attributes used on the Details: Active Time & Predictive tab:

#### Attributes on the Details: Active Time & Predictive tab

Attribute	Description
Tenant	Enables the organization of data by tenant.
Media Type	Enables the organization of data by media type.
Agent Name	Enables the organization of data by agent.
Hour	Enables the organization of data based on the day/ date on which the interaction occurred.
Predictor Switch	Enables the organization of data based on whether predictive routing is ON or OFF.
Predictor	Enables the organization of data based on what predictor was used.
Model	Enables the organization of data based on what model was used.

The following table explain the metrics used on the Details: Active Time & Predictive tab:

#### Metrics on the Details: Active Time & Predictive tab

Metric	Description
Offered	The total number of interactions that entered this queue and were subsequently offered to a resource within the reporting interval.
Accepted	The total number of times, within the reporting interval, that customer interactions and warm consultations were accepted, answered, or pulled by an agent, voice-treatment port, IVR port, or nonagent-associated DN (such as contact center resources that can alert).
% Occupancy	The percentage of time within the reporting interval that this agent's state was Busy, relative to the total duration within the interval of the agent's active session on a particular media channel.  This metric reflects the percentage of time that agents actually spent handling interactions against their available or idle time. This metric is computed as (active time minus ready and not-

	ready time) divided by (active time minus not-ready time).
Active Time (Fmt)	The total amount of time (HH:MM:SS) attributable to the interval between the beginning and end of this agent's login session(s) on a particular media channel. In the scenario in which an agent logs into multiple switches, DNs, and/or queues, this metric starts the moment at which the agent logs in to the first switch/DN/queue (if this login falls within the interval) and ends at the moment at which the agent is no longer logged in to any switch/DN/queue (if logout falls within the interval).
Avg Agent Score	The sum of all Agent Scores (gpmAgentScore), divided by the total number of interactions where GPR was active.

### Details:Interaction Time tab

The following table explains the attributes used on the Details: Interaction Time tab:

#### **Attributes on the Details: Interaction Time tab**

Attribute	Description
Tenant	Enables the organization of data by tenant.
Media Type	Enables the organization of data by media type.
Agent Name	Enables the organization of data by agent.
Hour	Enables the organization of data based on the day/ date on which the interaction occurred.

The following table explain the metrics used on the Details: Interaction Time tab:

#### **Metrics on the Details: Interaction Time tab**

Metric	Description
Active Time (Fmt)	The total amount of time (HH:MM:SS) attributable to the interval between the beginning and end of this agent's login session(s) on a particular media channel. In the scenario in which an agent logs into multiple switches, DNs, and/or queues, this metric starts the moment at which the agent logs in to the first switch/DN/queue (if this login falls within the interval) and ends at the moment at which the agent is no longer logged in to any switch/DN/queue (if logout falls within the interval).
Ready Time (Fmt)	The total amount of time (HH:MM:SS) that this agent was in the Ready state for a particular media channel.
Not Ready Time (Fmt)	The total amount of time (HH:MM:SS) within the interval that this agent was in the NotReady state

	for a particular media channel.
Wrap Time (Fmt)	The total amount of time (HH:MM:SS) within the interval that this agent spent in ACW.
Other State Time (Fmt)	The total amount of time (HH:MM:SS) that the state of this agent was neither Ready nor NotReady after login to a particular media channel.
% Ready Time	The percentage of time within the interval that agents were in the Ready state, divided by the total duration, within the interval, of active agent sessions.
% Not Ready Time	The percentage of time within the interval that agents were in the Ready state, divided by the total duration, within the interval, of active agent sessions.
% Busy Time	The percentage of time spent by agent on interaction processing activities during a day (login-logout).
% Wrap Time	The percentage of time that this agent spent in ACW.
% Other State Time	The percentage of the agent's time spent in a state other than those listed in the report.
%Busy Time	The percentage of time agents spent on interaction-processing activities including the time that is associated with requests for consultation that the agent received and excluding the time spent processing after-call work (ACW).
% Occupancy	The percentage of time within the reporting interval that this agent's state was Busy, relative to the total duration within the interval of the agent's active session on a particular media channel. This metric reflects the percentage of time that agents actually spent handling interactions against their available or idle time. This metric is computed as (active time minus ready and not-ready time) divided by (active time minus not-ready time).
Busy Time (Fmt)	The total duration (HH:MM:SS) of all of interaction processing activities including the time that is associated with requests for consultation that the agent received and excluding the time spent processing after-call work (ACW).

# Predictive Routing Detail Report



Predictive Routing Detail Report

Use the **Predictive Routing Detail Report** to view detailed interaction-level data about how Genesys Predictive Routing (GPR) is used in your contact center, and to understand how it impacts Key Performance Indicators (KPI), including detailed metrics that profile agent scoring, and allow you to compare different models or predictors.

Because of the volume of data that this report could potentially generate, Genesys recommends that you restrict the start and end dates to the narrowest range that satisfy your report criteria. The default date selections span one day. You can also limit the data that is retrieved, and thereby improve report performance, by specifying agent and queue prompts.

Unlike prompt behavior in other reports, the time component of the Start and End Time prompts is active.

For multiple-switch environments that share the same queue names across switches, you can customize this report to recognize a particular switch-queue combination (instead of the queue alone) to retrieve the desired results.

For Oracle RDBMSs, the Handling Attempt Hint attribute must be listed first on the query panel in order for the instructions of optimization to be processed.

This report presents data on one tab:

Main

To get a better idea of what this report looks like, view sample output from the report: Sample Predictive Routing Detail Report.pdf

The following tables explain the prompts, attributes, and metrics used in this report:

#### **Prompts in the Predictive Routing Detail Report**

Prompt	Description
Preset Day Filter	From the list of preset options, choose the day on

	which to report.
	Choose the day and time from which to begin
Start Time	collecting data into the report (the report shows no more than one day at a time).
End Time	Choose the day and time at which to stop collecting data into the report (the report shows no more than one day at a time).
Target Agent Group	Choose the Agent group on which to report.
Target Agent	Choose individual agents on which to report.
Last Queue	Enables the organization of data based on the name of the last queue in which the interaction traveled before it was handled. This attribute excludes virtual queues.
Customer ID	Enables the organization of data based on the customer ID as it appears in an external CRM application. This value enables Genesys Info Mart tables to be joined to external data-mart tables and is referenced by the user-defined GIM key that has an ID of 10053. Refer to the Genesys Info Mart 8.0 Deployment Guide for information about GIM attached data key assignments.
From	Enables the organization of data by the source address of the interaction. For voice, the source address is the interaction's automatic number identification (ANI). For email, the source address is the customer's email address. For chat, the source address is empty.
То	Enables the organization of data by the target address of the interaction. For voice, the target address is the interaction's dialed number identification service (DNIS). For email, the target address is a contact center email address. For chat, the target address is empty.
Business Result	Enables the organization of data by business result.
Customer Segment	Enables the organization of data by customer segment.
Service Type	Enables the organization of data by service type.
Service Subtype	Enables the organization of data by service subtype.
Media Type	Enables the organization of data by media type.
Interaction Type	3
	Enables the organization of data by interaction type.
Predictor	Enables the organization of data by interaction
Predictor  Model	Enables the organization of data by interaction type.  Enables the organization of data by the identifier for the predictor that was used to request scoring

Interaction ID Enables the organization of data based on the identifiers associated with interactions.

#### **Attributes in the Predictive Routing Detail Report**

Attribute	Description
Tenant	Enables the organization of data based on the specific tenant or business unit for a customer deployment.
Media Type	Enables the organization of data based on the media type of the interaction—for example, VOICE, EMAIL, and CHAT.
Interaction ID	Enables the organization of data based on the interaction ID of the INTERACTION_FACT or the INTERACTION_RESOURCE_FACT table. For voice interactions, the Interaction ID is the call's connection ID, which is assigned by the telephony server. This ID remains unchanged for as long as the telephony server processes the interaction. For multimedia interactions originating from an Interaction Server, this value is the assigned Interaction ID.
Start Timestamp	Enables the organization of data based on the moment when the interaction entered the contact center.
End Timestamp	Enables the organization of data based on the moment when the interaction ended.
From	Enables the organization of data based on the source address of the interaction. For voice, the source address is the interaction's automatic number identification (ANI). For email, the source address is the customer's email address. For chat, the source address is empty.
То	Enables the organization of data based on the target address of the interaction. For voice, the target address is the interaction's dialed number identification service (DNIS). For email, the target address is a contact center email address. For chat, the target address is empty.
GUID	Enables the organization of data based on the globally unique identifier of the interaction as reported by the interaction media server. This identifier may not be unique. In the case of T-Server voice interactions, the GUID is the Call UUID. In the case of Multimedia, the GUID is the Interaction ID from Interaction Server.
Interaction/Handling Attempt ID	Enables the organization of data based on the primary key of the INTERACTION_RESOURCE_FACT table.
Interaction/Type	Enables the organization of data based on the interaction's type—for example, Inbound, Outbound, and Internal.

Customer ID	The customer ID as it appears in an external CRM application. This value enables Genesys Info Mart tables to be joined to external data-mart tables and is referenced by the user-defined Genesys Info Mart key that has an ID of 10053. Refer to the Genesys Info Mart Deployment Guide for information about Genesys Info Mart attached data key assignments.  The Customer ID attribute in the Flow folder references a field in a derived table whose values are sourced, in part, from the listed Info Mart table.
Handling Attempt Start	Enables data to be organized by the moment when the resource's participation in the interaction started.
Handling Attempt End	les data to be organized by the moment when the resource's participation in the interaction ended.
Business Attributes/Service Type	Enables the organization of data based on the type of service that was assigned to the interaction.
Business Attributes/Service Subtype	Enables the organization of data based on the detailed type of service that the customer requested.
Business Attributes/Customer Segment	Enables the organization of data based on the configured customer segment.
Business Attributes/Business Result	Enables the organization of data based on the configured business result.
Routing Target	Enables the organization of data based on the name of the agent group, place group, or skill expression that served as the target of the routing strategy.
Routing Target Type	Enables the organization of data based on the type of the routing target—for example, Agent, Place, Agent Group, Routing Point, and Queue.
Routing Target Selected	Enables the organization of data based on the name of the DN group that is the target of the routing strategy.
Last IVR	Enables the organization of data based on the name of the last IVR in which the interaction traveled.
Last Queue	Enables data within the reporting interval to be organized based on the type of queue, such as ACDQueue, InteractionQueue, or InteractionWorkBin.  Adding this Last Queue to a report can have a significant impact
	on performance.
Last VQueue	Enables the organization of data based on the name of the last virtual queue in which the interaction traveled before it was handled.
Handling Resource	Enables the organization of data based on the name of the queue, virtual queue, workbin, Interaction queue, IVR port, or agent.

Resource State	Enables the organization of data based on the media-specific or detailed state of the resource—for example, Busy, Ready, NotReady, and AfterCallWork.
Technical Result	Enables the organization of data based on its disposition—its technical result and other aspects of the technical result—for example, Abandoned, Completed, Diverted, Pulled, and Transferred.
Technical Result/Reason	Enables the organization of data based on the reason for the technical result—for example, Abandoned-WhileRinging, AnsweredByAgent, and RouteOnNoAnswer.
Technical Result/Resource Role	Enables the organization of data based on the role that is associated by the resource—for example, Puller, Received, and RoutedTo.
Technical Result/Role Reason	Enables the organization of data based on the reason of the resource role—for example, Conference-Initiator, ConferenceJoined, and PulledBackTimeout.
Predictor Switch	Enables the organization of data based on whether predictive routing is ON or OFF.
A/B Test Status	Enables the organization of data by whether an interaction was processed by GPR under an 'Agent-Surplus' or 'Interaction Surplus' scenario, when running in A/B Testing interleaved mode.
PR Mode	Enables the organization of data based on the value of gpm-mode, which indicates the current mode of operation of GPR. Value is one of: prod, off, gpmdiscovery, ab-test-time-sliced, or unknown.
PR Result	Enables the organization of data by whether the predictive routing request was processed successfully. The value is either error or OK.
Model	Enables the organization of data by the name of the model that was used to score the agent for predictive routing.
Predictor ID	Enables the organization of data by the identifier for the predictor that was used to request scoring for predictive routing.
Predictor	Enables the organization of data by the name of the predictor that was used to request scoring for predictive routing.
GPR Customer Data Found	Enables the organization of data by whether features from customer records were successfully retrieved from CRM database and used in the calculation of agent scores.

#### **Metric in the Predictive Routing Detail Report**

Metric	Description
Interaction Duration	The duration of the interaction, in seconds.

	If an error occurs while returning scoring results, this field contains the error message. The value is NULL if no error is returned, or an integer between 1 and 10 to identify the error as one of the following strings:	
	1	ok
	2	Authentication to scoring engine failed
	3	Scoring request failed
PR Message	4	Agent list is empty
TR Message	5	URS overload, ixn skipped
	6	Predictor not found
	7	Failed to build scoring request
	8	SetIdealAgent or SetReadyContdition execution error
	9	Interaction log not found in global map
	10	Unknown error
GPR Agent Score	Predictive routing score for the interaction.	or the agent that handled
GPR Global Score	The average predictive roin the target group.	outing score for all agents
GPR Median Score	The median predictive rogroup of agents.	uting score for the target
GPR Max Score	The highest predictive round in the target group.	uting score for any agent
GPR Min Score	The lowest predictive rou the target group.	ting score for any agent in
GPR Agent Rank		uting score ranked against get group, where 1 is the e best score.
GPR Target Pool Size	The number of available skill set.	agents with the requested
Interaction Duration (Fmt)	The duration of the intera	action (HH:MM:SS).
Response Time (Fmt)	self-service IVR ports) pri	e or abandoned the time that the interaction ng routing points and nonor to abandonment or urce (agent or self-service luration at the resource

	Additionally, this metric includes the mediation duration of any immediate previous attempt to deliver the interaction that was redirected with a technical result of RoutedOnNoAnswer or Unspecified, as well as the alert duration that is associated with this attempt. Received consultations and collaborations are excluded from consideration.
Queue Time (Fmt)	The sum of the durations (HH:MM:SS) that interactions spent at ACD queue resources prior to arrival at the IRF resource. This duration excludes abandoned-while-queued interactions.
Routing Point Time (Fmt)	The sum of the durations (HH:MM:SS) that this IRF spent in routing point resources or routing strategy resources prior to arrival at the IRF resource.
Total Duration (Fmt)	The total duration (HH:MM:SS) of the IRF resource's participation in the interaction, irrespective of the interval(s) in which the IRF endures, including hold duration and the time that the interaction spent in mediation. This metric excludes alert duration, received consultations, and received collaborations.
	The amount of time (HH:MM:SS) that the agent processed a customer-related interaction at this resource during an interaction handling attempt. This metric includes internal interactions.
Customer Engage Time (Fmt)	For synchronous interactions, this is the time that the agent spent interacting with a customer. The duration includes talk duration of conferenced interactions. For asynchronous interactions, this is the time that the agent spent handling an inbound interaction from a customer, handling an internal interaction from another agent, or handling a reply interaction back to the customer. This duration excludes consultations and collaborations, whether they were initiated or received.
Customer Hold Time (Fmt)	The amount of time (HH:MM:SS) that the agent had the customer on hold. This metric excludes hold durations that are associated with initiated or received consultations but includes hold duration of conferenced interactions.
Customer Handle Time (Fmt)	The sum of the values of Customer Engage Time, Customer Hold Time, and Customer Wrap Time metrics.
Customer Alert Time (Fmt)	For voice interactions, the amount of time (HH:MM:SS) that the interaction was ringing at the resource during a voice handling attempt while a customer was present.  For multimedia interactions, the amount of time (HH:MM:SS) that the customer-related interaction was alerting at the resource during an interaction handling attempt. For email interactions, this metric includes agent's handling of an inbound
	email from a customer or an internal email from another agent, or handling a reply email back to the customer. This metric excludes handling a collaboration, whether on the initiating or receiving side.

Customer Dial Time (Fmt)	The amount of time (HH:MM:SS) that the IRF resource spent initiating an outbound, customer-related interaction. The duration starts when the dialing event is sent, includes the mediation time that the initiator incurs while waiting for the target resource to connect, and ends when the call is either established or terminated on no answer. Initiated consultations are excluded from consideration.
Customer Wrap Time (Fmt)	The amount of time (HH:MM:SS) that the resource was in interaction-related After-Call Work (ACW or Wrap) state that pertained to this customer voice-interaction resource. The duration excludes ACW duration that is associated with received consultations.
Conference Initiated Time (Fmt)	The amount of time (HH:MM:SS) that a conference initiated by the IRF resource was connected (established). Duration applies only to the portion of the IRF that represents the IRF resource as a conference initiator.
Conference Received Time (Fmt)	The amount of time (HH:MM:SS) that a conference that was joined by the IRF resource was connected (established). Duration applies only to the portion of the IRF that represents the IRF resource as a conference joiner.

# Predictive Routing Operational Report



Predictive Routing Operational Report

Use the **Predictive Routing Operational** Report to track key Genesys Predictive Routing (GPR) operational statistics, including the number of interactions offered and accepted, and metrics that indicate how long interactions waited to be scored, and how long they waited in queue.

This report organizes data on the following tabs:

Main

To get a better idea of what this report looks like, view sample output from the report: Sample Predictive Routing Operational Report.pdf

The following tables explain the prompts, attributes, and metrics used in this report:

#### **Prompts in the Predictive Routing Operational Report**

Prompt	Description
Pre-set Date Filter	Choose a day from the list of preset options. This prompt overrides the Start Date and End Date values. Default: Year to Date.
Start Date	Choose the day and time from which to begin collecting data into the report. This prompt has no effect if Pre-set Date Filter is set to anything except <b>None</b> .
End Date	Choose the day and time at which to stop collecting data into the report. This prompt has no effect if Pre-set Date Filter is set to anything except <b>None</b> .
Media Type	Select one or more media types to include in the report.
Predictor	Select one or more predictors to include in the report.
Model	Select one or more models to include in the report.

Tenant Select one or more tenants to include in the report.

#### **Attributes in the Predictive Routing Operational Report**

Attribute	Description
Tenant	Enables the organization of data based on the specific tenant or business unit for a customer deployment.
Media Type	Enables the organization of data based on the media type of the interaction—for example, VOICE, EMAIL, and CHAT.
Day	Enables the organization of data based on the day/ date on which the interaction occurred.
Predictor Switch	Enables the organization of data based on whether predictive routing is ON or OFF.
Predictor	Enables the organization of data based on the identifier for the predictor that was used to request scoring for predictive routing.
Model	Enables the organization of data based on the identifier for the model that was used to calculate agent scores for predictive routing.
Result	Enables the organization of data based on the result of Predictive Routing processing. If there is an error, this metric displays the error message (gpmMessage) as a value between 1 and 15.  • 1 - Ok  • 2 -  Authentication to scoring engine engine failed  • 3 - Scoring request failed  • 4 - Agent list is empty  • 5 - URS overload, interaction skipped  • 6 - Predictor not found  • 7 - Failed to

#### **Metrics in the Predictive Routing Operational Report**

Metric	Description
Offered	Total number of calls offered.
Accepted	Total number of calls accepted.

Avg Agent Score	The average score, calculated as the sum of all agent scores for agents who handled an interaction routed by GPR, divided by the total number of interactions.
Avg Turnaround Time (Fmt)	Average amount of time (HH:MM:SS) that interactions waited for predictive routing scoring to be completed. This calculation considers all calls, within the reporting period, that used a given Predictor and Model.
% Error	Percentage of active interactions that received a predictive routing error score.
Avg Accept Time	The average amount of time (HH:MM:SS) that customers waited before their interactions—distributed from this queue—were accepted by a handling resource.

# Predictive Routing Queue Statistics Report



Predictive Routing Queue Statistics Report

Use the **Predictive Routing Queue Statistics Report** to track KPIs for each queue when Genesys Predictive Routing (GPR) is used to optimize routing. The report allows you to monitor overall interaction-processing performance of queues, including contrasting, for each Model and Predictor, the number of Offered and Accepted interactions, Accept, Handle, and Engage Time, as well as abandoned and service level metrics.

This report organizes data on the following tabs:

Main

To get a better idea of what this report looks like, view sample output from the report: Sample Predictive Routing Queue Statistics Report.pdf

The following tables explain the prompts, attributes, and metrics used in this report:

#### **Prompts in the Predictive Routing Queue Statistics Report**

Prompt	Description
Pre-set Date Filter	Choose a date from the list of preset options. This prompt overrides the Start Time and End Time values.
Start Date	Choose the date from which to begin collecting data into the report. This prompt has no effect if Pre-set Date Filter is set to anything except <b>None</b> .
End Date	Choose the date at which to stop collecting data into the report.
Queue	Select one or more queues from which to gather data into the report. Default: <b>ALL</b>
Media Type	Select one or more media types to include in the report. Default: <b>ALL</b>
Predictor	Select one or more predictors to include in the report. Default: <b>ALL</b>
Model	Select one or more models to include in the report. Default: <b>ALL</b>
Tenant	Select one or more tenants to include in the report. Default: <b>ALL</b>

#### **Attributes in the Predictive Routing Queue Statistics Report**

Attribute	Description
Tenant	Enables the organization of data based on the specific tenant or business unit for a customer deployment.
Media Type	Enables the organization of data based on the media type of the interaction—for example, VOICE, EMAIL, and CHAT.
Queue	Enables the organization of data based on the name of the ACD queue, virtual queue, interaction queue, or workbin.
Day	Enables the organization of data based on the day/ date on which the interaction occurred.
Predictor Switch	Enables the organization of data based on whether predictive routing is ON or OFF.
Predictor	Enables the organization of data based on the identifier for the predictor that was used to request scoring for predictive routing. (PREDICTOR ID - PREDICTOR NAME)
Model	Enables the organization of data based on the identifier for the model that was used to calculate agent scores for predictive routing. (MODEL ID - MODEL DESC)

#### **Metrics in the Predictive Routing Queue Statistics Report**

Metric	Description
Offered	The total number of interactions that entered this queue and were subsequently offered to a resource
Accepted	The total number of times that customer interactions and warm consultations that were distributed from this queue, were accepted, answered, or pulled by an agent, voice-treatment port, IVR port, or nonagent-associated DN (such as contact center resources that can alert).
Avg Handle Time	The average amount of time (HH:MM:SS) that agents spent handling customer interactions or warm consultations that were distributed or pulled from this queue.
Avg Engage Time	For customer interactions that were distributed or pulled from this queue, the average amount of time (HH:MM:SS) that agents were engaged with customers.
Avg Agent Score	Calculated as the sum of all Agent Scores (gpmAgentScore), divided by the total number of interactions that were distributed from this queue, where GPR was active.
Avg Accept Time	The average amount of time (HH:MM:SS) that customers waited before their interactions—distributed from this queue—were accepted by a handling resource.

% Abandoned Waiting	The percentage of customer interactions that both entered this queue and were subsequently abandoned before the interactions could be distributed, relative to the total number of interactions that entered this queue.
% Accept Service Level	The service level of this queue measured as a percentage of interactions that entered this queue and were accepted within the acceptance threshold, relative to all interactions that entered this queue and were offered to a resource.

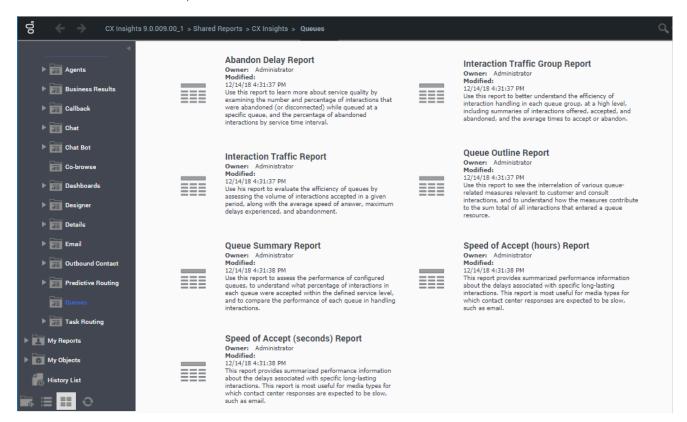
# Queues reports

This page describes reports that contain detailed information about activity in your contact center organized on a queue-by-queue basis. Reports in the **Queues** folder are ready-to-use, but as always, can be modified to suit your specific business needs.

#### Tip

Interactions pertaining to an queue are attributed to each group of which the agent is a member. So, in scenarios where an queue is a member of more than one queue group, interactions are counted against each group, and can therefore appear more than once in historical reports. Similarly, interactions that are attributed to agents that are members of more than one agent group are reported against both agent groups.

### About Queues reports



The following reports are available in the **CX Insights** > **Queues** folder:

- Abandon Delay Report
- Interaction Traffic Group Report
- Interaction Traffic Report
- Queue Outline Report
- Queue Summary Report
- Speed of Accept (hours) Report
- Speed of Accept (seconds) Report
- Weekly Queue Summary Dashboard

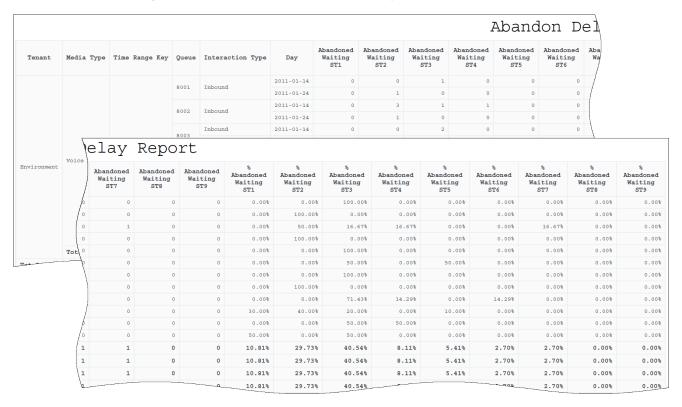
#### **Related Topics**:

- Go back to the complete list of available reports.
- Learn how to understand and use reports.
- Learn how to create or customize reports.

# Abandon Delay Report

This page describes how you can use the (**Queues** folder) Abandon Delay Report to learn more about service quality by examining the number and percentage of interactions that were abandoned (or disconnected) while queued at a specific queue, and the percentage of abandoned interactions by service time interval.

### Understanding the Abandon Delay Report



This report gauges service quality by indicating how many interactions were abandoned (or disconnected), as well as the percentage of interactions that were abandoned, while the interactions were queued at a specific queue, and the percentage of abandoned interactions by service time interval.

To get a better idea of what this report looks like, view sample output from the report: SampleAbandonDelayReport.pdf

The following tables explain the prompts you can select when you generate the report, and the metrics and attributes that are represented in the report:

## Prompts for the Abandon Delay Report

Prompt	Description
Pre-set Date Filter	Choose from the convenient list of predefined rolling time ranges, spanning one day or more, over which to run the report.
Start Date	Choose the first day from which to gather report data.
End Date	Choose the last day from which to gather report data.
Queue Group	Optionally, select a queue group on which to report.
Queue	Optionally, select a queue on which to report.
Media Type	Optionally, select the type of media to include in the report—for example, VOICE, EMAIL, and CHAT.
Interaction Type	Optionally, select the type of interaction to include in the report—for example, Inbound, Outbound, and Internal.
Tenant	For multi-tenant environments, optionally select the tenant(s) for which to include data in the report.

# Attributes for the Abandon Delay Report

Attribute	Description
Tenant	This attribute enables data within the reporting interval to be organized by tenant.
Media Type	This attribute enables data to be organized by the interaction's media type—for example, VOICE, EMAIL, and CHAT.
Time Range Key	This attribute enables the identification of time- range boundaries by tenant. These boundaries define the upper and lower limits for the service- time intervals that are used by the Speed of Accept and Abandon Delay reports.
Queue	This attribute enables data within the reporting interval to be organized by the name of the ACD queue, virtual queue, interaction queue, or workbin.
Interaction Type	This attribute enables data to be organized by the interaction's type—for example, Inbound, Outbound, and Internal.
Day	This attribute enables data within the reporting interval to be organized by a particular day within a month and year. Day values are presented in YYYY-MM-DD format.

# Metrics used in the Abandon Delay Report

Metric	Description
Abandoned Waiting ST1	The total number of times that interactions entered this queue and were subsequently abandoned prior to the first abandon threshold. If the first abandon threshold is not configured, this measure uses no limit as the upper boundary of the abandon interval.
	Abandon thresholds are defined within the [agg-gim-thld-QUEUE-ABN] section.
Abandoned Waiting ST2-ST9	The total number of times interactions that entered this queue and were subsequently abandoned within the time interval bounded by the corresponding <b>abandon-in-queue</b> thresholds. If the next lower abandon threshold is not configured, this measure returns 0.
	Abandon thresholds are defined within the [agg-gim-thld-QUEUE-ABN] section.
Abandoned Waiting ST10	The total number of times that interactions entered this queue and were subsequently abandoned beyond the ninth abandon threshold. If the ninth abandon threshold is not configured, this measure returns 0.
	Abandon thresholds are defined within the [agg-gim-thld-QUEUE-ABN] section.
% Abandoned Waiting ST1	The percentage of interactions that entered this queue and were subsequently abandoned prior to the first abandon-in-queue threshold, relative to all interactions that entered this queue and were abandoned. This measure excludes interactions that were abandoned after distribution, but it includes short-abandoned interactions.
% Abandoned Waiting ST2 - ST9	The percentage of interactions that entered this queue and were subsequently abandoned within the interval bounded by the corresponding abandon-in-queue thresholds, relative to all interactions that entered this queue and were abandoned. This measure excludes interactions that were abandoned after distribution from the queue, but it includes short-abandoned interactions if they fall within the aforementioned abandon thresholds.
% Abandoned Waiting ST10	The percentage of interactions that entered this queue and were subsequently abandoned beyond the ninth abandon-in-queue threshold, relative to all interactions that entered this queue and were abandoned. This measure excludes interactions that were abandoned after distribution, but it includes short-abandoned interactions if they fall

Metric	Description
	beyond the ninth abandon threshold.

# Interaction Traffic Group Report

This page describes how you can use the (**Queues** folder) Interaction Traffic Group Report to see detailed information the efficiency of interaction handling, by queue group.

### Understanding the Interaction Traffic Group Report



This report summarizes contact center activity as Interactions are offered to, abandoned within, and distributed from queues that belong to one or more queue group(s), including overall percentages of service level, and exceptions to service level. Mediation DN activity is rolled up to all of the groups to which the DN belongs. Counts and durations are attributed to the interval in which the interaction enters the mediation DN.

Use this report to better understand the efficiency of interaction handling in each queue group, at a high level, including summaries of interactions offered, accepted, and abandoned, and the average times to accept or abandon.

To get a better idea of what this report looks like, view sample output from the report: HRCXIInteractionTrafficGroupReport.pdf

The background color of data cells in this report serve to alert you to values that are outside of configured threshold ranges.

The following tables explain the prompts you can select when you generate the report, and the metrics and attributes that are represented in the report:

### Prompts for the Interaction Traffic Group Report

Prompt	Description
Pre-set Date Filter	From the list, choose a time period on which to report, and move it to the Selected list.
Start Date	Choose the first day from which to gather report data.
End Date	Choose the last day from which to gather report data.
Queue Group	Optionally, select a queue on which to report.
Media Type	Optionally, select the type of media to include in the report—for example, VOICE, EMAIL, and CHAT.
Interaction Type	Optionally, select the type of interaction to include in the report—for example, Inbound, Outbound, and Internal.
Tenant	For multi-tenant environments, optionally select the tenant(s) for which to include data in the report.

### Attributes used in the Interaction Traffic Group Report

Attribute	Description
Tenant	This attribute enables data within the reporting interval to be organized by tenant.
Media Type	This attribute enables data to be organized by the interaction's media type—for example, VOICE, EMAIL, and CHAT.
Queue Group	This attribute enables reporting data within the reporting interval to be organized by the name of the queue group. A queue can belong to more than one queue group.

Attribute	Description
Interaction Type	This attribute enables data to be organized by the interaction's type—for example, Inbound, Outbound, and Internal.
Day	This attribute enables data within the reporting interval to be organized by a particular day within a month and year. Day values are presented in YYYY-MM-DD format.

# Metrics used in the Interaction Traffic Group Report

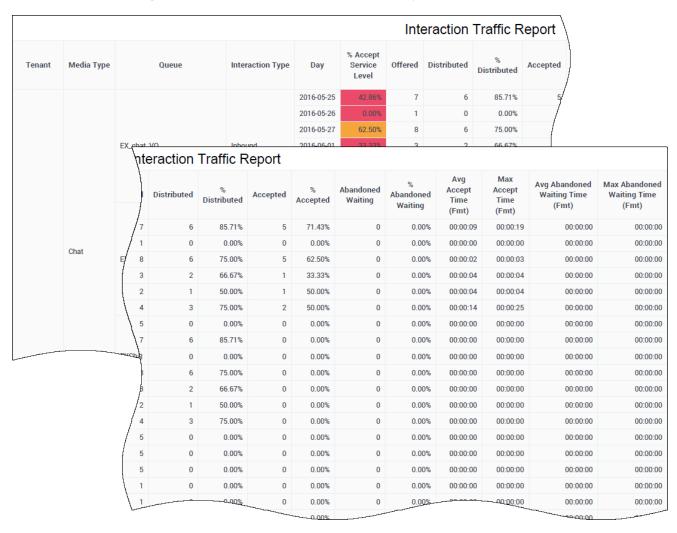
Metric	Description
% Accept Service Level	The service level of this queue group measured as a percentage of interactions that entered queues that belong to this queue group and were accepted within the acceptance threshold, relative to all interactions that entered queues that belong to this queue group and were offered to a resource.  This metric yields results other than 0 only for interactions that were accepted by an agent. This metric relies on the value of the acceptance threshold as configured in the [agg-gim-thld-QUEUE-IXN] section.
Offered	The total number of interactions that entered queues that belong to this queue group and were subsequently offered to a resource.  The count excludes short-abandoned interactions and includes handling attempts that agents rejected, as well as warm consultations, conferences, and collaborations that agents received. This metric does include interactions for which no threshold was set by Router. This metric relies on the value of the short-abandoned threshold as configured in the [agg-gim-thid-QUEUE-IXN] section.
Distributed	The total number of times that customer interactions or established warm consultations were distributed or pulled from queues that belong to this queue group.  Distribution includes the interactions that were:  Distributed to another queue.  Distributed to an unmonitored resource.  Accepted, answered, or pulled.  Rejected/redirected upon no answer.  Abandoned by the customer while they were alerting at the agent.

Metric	Description
	If the interaction passes through more than one queue before it was distributed, the count is increased only for that device from which the interaction was distributed or pulled.
Accepted	The total number of times that customer interactions and warm consultations that were distributed from queues that belong to this queue group, were accepted, answered, or pulled by an agent, voice-treatment port, IVR port, or nonagent-associated DN.
Abandoned Waiting	The total number of times that customer interactions entered queues that belong to this queue group and were abandoned or dropped for any reason before the interactions could be distributed.
	The count includes short-abandoned interactions and excludes interactions that were abandoned after distribution, such as abandoned-while-inviting interactions.
Short Abandoned Waiting	The total number of times that customer interactions entered queues that belong to this queue group and were abandoned within the <b>short-abandoned threshold</b> .  The count excludes interactions that were abandoned after distribution. This metric relies on the value of the <b>short-abandoned threshold</b> as configured in the <b>[agg-gim-thld-QUEUE-IXN]</b> section.
Avg Accept Time (Fmt)	The average amount of time (HH:MM:SS) that customers waited before their interactions—distributed from queues that belong to the queue group—were accepted by a handling resource.  This metric is identical to Queue\ASA.
Avg Abandoned Waiting Time (Fmt)	The average amount of time, in seconds, that customer interactions spent at queues that belong to this queue group before they were abandoned or dropped for any reason.  This average includes the duration and count of shortabandoned interactions.

# Interaction Traffic Report

This page describes how you can use the (**Queues** folder) Interaction Traffic Report to learn more about the efficiency of individual queues.

### Understanding the Interaction Traffic Report



This report provides detailed information about contact center activity as interactions are offered to, abandoned within, and distributed from queues, including overall percentages of service level by tenant, and exceptions to service level by queue.

Use his report to evaluate the efficiency of queues by assessing the volume of interactions accepted

in a given period, along with the average speed of answer (Avg Accept Time), maximum delays experienced before acceptance (Max Accept Time), and abandonment (Max Abandoned Waiting Time) from the perspective of the mediation DN.

To get a better idea of what this report looks like, view sample output from the report: HRCXIInteractionTrafficReport.pdf

The background color of data cells in this report serve to alert you to values that are outside of configured threshold ranges.

The following tables explain the prompts you can select when you generate the report, and the metrics and attributes that are represented in the report:

### Prompts for the Interaction Traffic Report

Prompt	Description
Pre-set Date Filter	From the list, choose a time period on which to report, and move it to the Selected list.
Start Date	Choose the first day from which to gather report data.
End Date	Choose the last day from which to gather report data.
Queue Group	Optionally, select a queue on which to report.
Queue	Optionally, select a queue on which to report.
Media Type	Optionally, select the type of media to include in the report—for example, VOICE, EMAIL, and CHAT.
Interaction Type	Optionally, select the type of interaction to include in the report—for example, Inbound, Outbound, and Internal.
Tenant	For multi-tenant environments, optionally select the tenant(s) for which to include data in the report.

### Attributes used in the Interaction Traffic Report

Attribute	Description
Tenant	This attribute enables data within the reporting interval to be organized by tenant.
Media Type	This attribute enables data to be organized by the interaction's media type—for example, VOICE, EMAIL, and CHAT.
Queue	This attribute enables data within the reporting interval to be organized by the name of the ACD queue, virtual queue, interaction queue, or

Attribute	Description
	workbin.
Interaction Type	This attribute enables data to be organized by the interaction's type—for example, Inbound, Outbound, and Internal.
Day	This attribute enables data within the reporting interval to be organized by a particular day within a month and year. Day values are presented in YYYY-MM-DD format.

## Metrics used in the Interaction Traffic Report

Metric	Description
% Accept Service Level	The service level of this queue measured as a percentage of interactions that entered this queue and were accepted within the acceptance threshold, relative to all interactions that entered this queue and were offered to a resource.  This metric yields results other than 0 only for interactions that were accepted by an agent. This metric relies on the value of the acceptance threshold as configured in the [agg-gim-thid-QUEUE-IXN] section.
Offered	The total number of interactions that entered this queue and were subsequently offered to a resource.  The count excludes short-abandoned interactions and includes handling attempts that agents rejected, as well as warm consultations, conferences, and collaborations that agents received. This metric does include interactions for which no threshold was set by Router. This metric relies on the value of the short-abandoned threshold as configured in the [agg-gim-thid-QUEUE-IXN] section.
Distributed	The total number of times that customer interactions or established warm consultations were distributed or pulled from this queue.  Distribution includes the interactions that were:  Distributed to another queue.  Distributed to an unmonitored resource.  Accepted, answered, or pulled.  Rejected/redirected upon no answer.  Abandoned by the customer while they were alerting at the agent.  If the interaction passes through more than one queue before it was distributed, the count is increased only for that device from which the interaction was distributed or pulled.

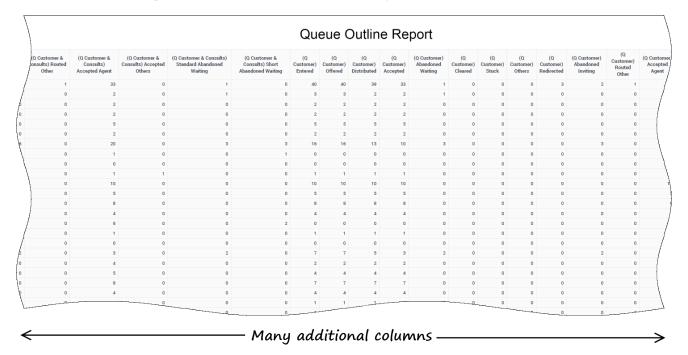
Metric	Description
% Distributed	The percentage of customer interactions or warm consultations that entered this queue and were subsequently distributed to a resource, relative to the total number of interactions that entered this queue and were offered to a resource.
	This metric relies on the value of the <b>short-abandoned threshold</b> as configured in the <b>[agg-gim-thld-QUEUE-IXN]</b> section.
Accepted	The total number of times that customer interactions and warm consultations that were distributed from this queue, were accepted, answered, or pulled by an agent, voice-treatment port, IVR port, or nonagent-associated DN (such as contact center resources that can alert).
% Accepted	The percentage of customer interactions and warm consultations that entered this queue and were subsequently distributed and accepted, relative to the total number of interactions that entered this queue.
	This metric relies on the value of the <b>acceptance threshold</b> as configured in the <b>[agg-gim-thld-QUEUE-IXN]</b> section.
Abandoned Waiting	The total number of times that customer interactions entered this queue and were abandoned or dropped for any reason before the interactions could be distributed.  The count includes short-abandoned interactions and excludes
	interactions that were abandoned after distribution, such as abandoned-while-inviting interactions.
% Abandoned Waiting	The percentage of customer interactions that both entered this queue and were subsequently abandoned before the interactions could be distributed, relative to the total number of interactions that entered this queue.
Avg Accept Time (Fmt)	The average amount of time (HH:MM:SS) that customers waited before their interactions—distributed from this queue—were accepted by a handling resource.
	This metric is identical to Queue\ASA.
Max Accept Time (Fmt)	The longest amount of time (HH:MM:SS) that customer interactions that were distributed from this queue spent in a queue before they were accepted by the target resource.  Duration starts when the interaction enters the member queue
	and ends when the interaction is accepted—thereby, including alert (ring) time.
Avg Abandoned Waiting Time (Fmt)	The average amount of time (HH:MM:SS) that customer interactions spent at this queue before

Metric	Description
	they were abandoned or dropped for any reason.
	This average includes the duration and count of short- abandoned interactions.
Max Abandoned Waiting Time (Fmt)	The longest amount of time (HH:MM:SS) that customers waited at this queue before abandoning the interactions and before the interactions could be distributed.

# Queue Outline Report

This page describes how you can use the (**Queues** folder) Queue Outline Report to see detailed information about queue performance.

### Understanding the Queue Outline Report



This report collects data from more than forty metrics that provide detailed counts related to customer interactions and consult interactions, showing how the number of interactions/consultations that entered a particular queue or queue group break down into the various queue-related metrics that provide interaction counts.

Use this report to see the interrelation of various queue-related metrics relevant to customer and consult interactions, and to understand how the metrics contribute to the sum total of all interactions that entered a queue resource.

To get a better idea of what this report looks like, view sample output from the report: HRCXIQueueOutlineReport.pdf

The following tables explain the prompts you can select when you generate the report, and the metrics and attributes that are represented in the report:

## Prompts for the Queue Outline Report

Prompt	Description
Pre-set Date Filter	From the list, choose a time period on which to report, and move it to the Selected list.
Start Date	Choose the first day from which to gather report data.
End Date	Choose the last day from which to gather report data.
Queue Group	Optionally, select a queue on which to report.
Queue	Optionally, select a queue on which to report.
Media Type	Optionally, select the type of media to include in the report—for example, VOICE, EMAIL, and CHAT.
Interaction Type	Optionally, select the type of interaction to include in the report—for example, Inbound, Outbound, and Internal.
Tenant	For multi-tenant environments, optionally select the tenant(s) for which to include data in the report.

## Attributes used in the Queue Outline Report

Attribute	Description
Tenant	This attribute enables data within the reporting interval to be organized by tenant.
Media Type	This attribute enables data to be organized by the interaction's media type—for example, Voice, Email, and Chat.
Queue	This attribute enables data within the reporting interval to be organized by the name of the ACD queue, virtual queue, interaction queue, or workbin.
Interaction Type	This attribute enables data to be organized by the interaction's type—for example, Inbound, Outbound, and Internal.
Day	This attribute enables data within the reporting interval to be organized by a particular day within a month and year. Day values are presented in YYYY-MM-DD format.

# Metrics used in the Queue Outline Report

Metric	Description
(Q Customer & Consults) Entered	The sum of customer and consult Entered metrics.
(Q Customer & Consults) Offered	The sum of customer and consult Offered metrics.
(Q Customer & Consults) Distributed	The sum of customer and consult Distributed metrics.
(Q Customer & Consults) Accepted	The sum of customer and consult Accepted metrics.
(Q Customer & Consults) Abandoned Waiting	The sum of customer and consult Abandoned Waiting metrics.
(Q Customer & Consults) Cleared	The sum of customer and consult Cleared metrics.  Interactions can be cleared for many reasons. Refer to the Cleared Queue metric for a listing of these reasons.
(Q Customer & Consults) Stuck	The sum of customer and consult Stuck metrics.
(Q Customer & Consults) Others	The sum of customer and consult Others metrics.
(Q Customer & Consults) Redirected	The sum of customer and consult Redirected metrics.
(Q Customer & Consults) Abandoned Inviting	The sum of customer and consult Abandoned Inviting metrics.
(Q Customer & Consults) Routed Other	The sum of customer and consult Routed Other metrics.
(Q Customer & Consults) Accepted Agent	The sum of customer and consult Accepted Agent metrics.
(Q Customer & Consults) Accepted Others	The sum of customer and consult Accepted Other metrics.
(Q Customer & Consults) Standard Abandoned Waiting	The sum of customer and consult Standard Abandoned Waiting metrics.
(Q Customer & Consults) Short Abandoned Waiting	The sum of customer and consult Short Abandoned Waiting metrics.
(Q Customer) Entered	<ul> <li>The description of this metric varies according to the attributes and filters in the report query:</li> <li>Queue Attribute: The total number of times that customer interactions or established warm consultations entered this queue.</li> <li>Queue Group Attribute: The total number of times that customer interactions or established warm consultations entered queues that belong to this queue group.</li> <li>If an interaction enters this queue more than once, this metric counts each entrance separately.</li> </ul>
(Q Customer) Offered	The description of this metric varies according to the attributes and filters in the report query:

Metric	Description
	<ul> <li>Queue Attribute: The total number of interactions that entered this queue and were subsequently offered to a resource.</li> <li>Queue Group Attribute: The total number of interactions that entered queues that belong to this queue group and were subsequently offered to a resource.</li> <li>The count excludes short-abandoned interactions and includes handling attempts that agents rejected, as well as warm consultations, conferences, and collaborations that agents received. This metric does include interactions for which no threshold was set by Router. This metric relies on the value of the short-abandoned threshold as configured in the [agg-gim-thId-QUEUE-IXN] section.</li> </ul>
(Q Customer) Distributed	<ul> <li>The description of this metric varies according to the attributes and filters in the report query:</li> <li>Queue Attribute: The total number of times that customer interactions or established warm consultations were distributed or pulled from this queue.</li> <li>Queue Group Attribute: The total number of times that customer interactions or established warm consultations were distributed or pulled from queues that belong to this queue group.</li> <li>Distribution includes the interactions that were:</li> <li>Distributed to another queue.</li> <li>Distributed to an unmonitored resource.</li> <li>Accepted, answered, or pulled.</li> <li>Rejected/redirected upon no answer.</li> <li>Abandoned by the customer while they were alerting at the agent.</li> <li>If the interaction passes through more than one queue before it was distributed, the count is increased only for that device from which the interaction was distributed or pulled.</li> </ul>
(Q Customer) Accepted	<ul> <li>The description of this metric varies according to the attributes and filters in the report query:</li> <li>Queue Attribute: The total number of times that customer interactions and warm consultations that were distributed from this queue, were accepted, answered, or pulled by an agent, voice-treatment port, IVR port, or nonagent-associated DN (such as contact center resources that can alert).</li> </ul>

Metric	Description
	<ul> <li>Queue Group Attribute: The total number of times that customer interactions and warm consultations that were distributed from queues that belong to this queue group, were accepted, answered, or pulled by an agent, voice- treatment port, IVR port, or nonagent- associated DN.</li> </ul>
(Q Customer) Abandoned Waiting	The description of this metric varies according to the attributes and filters in the report query:  • Queue Attribute: The total number of times that customer interactions entered this queue and were abandoned or dropped for any reason
	<ul> <li>Queue Group Attribute: The total number of times that customer interactions entered queues that belong to this queue group and were abandoned or dropped for any reason before the interactions could be distributed.</li> </ul>
	The count includes short-abandoned interactions and excludes interactions that were abandoned after distribution, such as abandoned-while-inviting interactions.
	The description of this metric varies according to the attributes and filters in the report query:
	<ul> <li>Queue Attribute: The total number of times that customer interactions were cleared from this virtual queue, workbin, or interaction queue.</li> </ul>
	<ul> <li>Queue Group Attribute: The total number of times that customer interactions were cleared from virtual queues, workbins, or interaction queues that belong to this queue group.</li> </ul>
	Clearing involves any of the following actions:
(Q Customer) Cleared	Distribution to a parallel virtual queue.
	Default routed by the switch.
	<ul><li>Default routed by a routing strategy.</li><li>Removing interactions that are determined to</li></ul>
	be stuck.
	<ul> <li>Removing interactions for any other reason, such as abnormal stops.</li> </ul>
	<ul> <li>Removing interactions from a virtual queue by using the URS ClearTargets function.</li> </ul>
	<ul> <li>Removing interactions, reported in deployments that rely on Genesys Info Mart 8.5.004.06 or</li> </ul>

Metric	Description
	later, that the customer abandoned while parallel queued, except for interactions abandoned in the last-entered virtual queue.  Clearing excludes:  Interactions that were distributed from this virtual queue, workbin, or interaction queue.  Interactions that were queued for consultation or collaboration.  In deployments that rely on Genesys Info Mart 8.5.003.20 or earlier, Interactions that the customer abandoned while still queued.
(Q Customer) Stuck	<ul> <li>The description of this metric varies according to the attributes and filters in the report query:</li> <li>Queue Attribute: The total number of times that customer interactions were cleared from this virtual queue, workbin, or interaction queue because they were identified as being stuck (having a technical result of StuckCall).</li> <li>Queue Group Attribute: The total number of times that customer interactions were cleared from virtual queues, workbins, or interaction queues that belong to this queue group because the interactions were identified as being stuck (having a technical result of StuckCall).</li> <li>Interactions can be cleared for other reasons. Refer to the Cleared Queue metric for a listing of these reasons.</li> </ul>
(Q Customer) Others	Calculated as the difference between the (Q Customer) Cleared metric and the (Q Customer) Stuck metric. The description of this metric varies according to the attributes and filters in the report query:  • Queue Attribute: The total number of times that customer interactions were cleared from this virtual queue, workbin, or interaction queue for any reason other than being identified as stuck.  • Queue Group Attribute: The total number of times that customer interactions were cleared from virtual queues, workbins, or interaction queues that belong to this queue group for any reason other than being identified as stuck.
(Q Customer) Redirected	The description of this metric varies according to the attributes and filters in the report query:

Metric	Description
	<ul> <li>Queue Attribute: The total number of times that customer interactions entered this queue, rang at a routing target, and were redirected upon no acceptance/answer by an agent.</li> <li>Queue Group Attribute: The total number of</li> </ul>
	times that customer interactions entered queues that belong to this queue group, rang at a routing target, and were redirected upon no acceptance/answer by an agent.
	The description of this metric varies according to the attributes and filters in the report query:
(Q Customer) Abandoned Inviting	<ul> <li>Queue Attribute: The total number of times that customer interactions that were distributed or pulled from this queue were abandoned or dropped for any reason while the interactions were alerting or ringing at an agent.</li> </ul>
	<ul> <li>Queue Group Attribute: The total number of times that customer interactions that were distributed or pulled from queues that belong to this queue group were abandoned or dropped for any reason while the interactions were alerting or ringing at an agent.</li> </ul>
	The description of this metric varies according to the attributes and filters in the report query:
(Q Customer) Routed Other	<ul> <li>Queue Attribute: The total number of times that customer interactions entered this queue and were subsequently routed either to other mediation DNs or to unmonitored resources.</li> </ul>
	<ul> <li>Queue Group Attribute: The total number of times that customer interactions entered queues that belong to this queue group and were subsequently routed either to other mediation DNs or to unmonitored resources.</li> </ul>
(Q Customer) Accepted Agent	The description of this metric varies according to the attributes and filters in the report query:
	<ul> <li>Queue Attribute: The total number of times that customer interactions or warm consultations that were distributed from this queue, were accepted, answered, or pulled by an agent.</li> </ul>
	<ul> <li>Queue Group Attribute: The total number of times that customer interactions or warm consultations that were distributed from queues that belong to this queue group, were accepted, answered, or pulled by an agent.</li> </ul>

Metric	Description
(Q Customer) Accepted Others	The description of this metric varies according to the attributes and filters in the report query:
	<ul> <li>Queue Attribute: The total number of interactions that entered this queue and were subsequently distributed and accepted, answered, or pulled by a resource other than an agent, place DN, or extension DN.</li> </ul>
	<ul> <li>Queue Group Attribute: The total number of interactions that entered queues that belong to this queue group and were subsequently distributed and accepted, answered, or pulled by a resource other than an agent, place DN, or extension DN.</li> </ul>
	This metric is calculated as the difference between the total number of interactions that were accepted, answered, or pulled and the total number of interactions that were accepted, answered, or pulled by an agent resource.
	The description of this metric varies according to the attributes and filters in the report query:
(Q Customer) Standard Abandoned Waiting	<ul> <li>Queue Attribute: The total number of customer interactions that entered this queue and were abandoned or dropped for any reason beyond the short-abandoned threshold and before the interactions could be established.</li> </ul>
	<ul> <li>Queue Group Attribute: The total number of customer interactions that entered queues that belong to this queue group and were abandoned or dropped for any reason beyond the short-abandoned threshold and before the interactions could be established. This metric excludes interactions that were abandoned while they were alerting at a handling resource.</li> </ul>
	This metric relies on the value of the <b>short-abandoned threshold</b> as configured in the <b>[agg-gim-thld-QUEUE-IXN]</b> section.
(Q Customer) Short Abandoned Waiting	The description of this metric varies according to the attributes and filters in the report query:
	<ul> <li>Queue Attribute: The total number of times that customer interactions entered this queue and were abandoned within the short-abandoned threshold.</li> </ul>
	<ul> <li>Queue Group Attribute: The total number of times that customer interactions entered queues that belong to this queue group and were abandoned within the short-abandoned threshold.</li> </ul>
	The count excludes interactions that were abandoned after

Metric	Description
	distribution. This metric relies on the value of the <b>short-abandoned threshold</b> as configured in the <b>[agg-gim-thld-QUEUE-IXN]</b> section.
	<ul> <li>The description of this metric varies according to the attributes and filters in the report query:</li> <li>Queue Attribute: The total number of times that simple consultation requests entered this queue</li> </ul>
Consult Entered	where the collaborations/consultations were associated with customer interactions.
	<ul> <li>Queue Group Attribute: The total number of times that simple consultation requests entered queues that belong to this queue group where the collaborations/consultations were associated with customer interactions.</li> </ul>
	The description of this metric varies according to the attributes and filters in the report query:
Consult Offered	<ul> <li>Queue Attribute: The total number of consultation requests that entered this queue and were offered to a resource excluding interactions that were abandoned within the short-abandoned threshold, where the collaborations/consultations were associated with customer interactions.</li> </ul>
	<ul> <li>Queue Group Attribute: The total number of consultation requests that entered queues that belong to this queue group and were offered to a resource excluding interactions that were abandoned within the short-abandoned threshold, where the collaborations/ consultations were associated with customer interactions.</li> </ul>
	The count includes handling attempts that agents rejected as well as warm consultations, conferences, and collaborations that agents received. This metric includes neither consultation requests for which no threshold was set by Router nor consultation requests for which no service objective was set. This metric relies on the value of the <b>short-abandoned threshold</b> as configured in the <b>[agg-gim-thld-QUEUE-IXN]</b> section.
Consult Distributed	The description of this metric varies according to the attributes and filters in the report query:
	<ul> <li>Queue Attribute: The total number of times that simple consult interactions were distributed or pulled from this queue.</li> </ul>
	<ul> <li>Queue Group Attribute: The total number of times that simple consult interactions were distributed or pulled from queues that belong to</li> </ul>

Metric	Description
	this queue group.
Consult Accepted	The description of this metric varies according to the attributes and filters in the report query:
	<ul> <li>Queue Attribute: The total number of times that simple consult interactions, that were distributed from this queue, were accepted by an agent, voice-treatment port, IVR port, or nonagent-associated DN (such as contact center resources that can alert).</li> </ul>
	<ul> <li>Queue Group Attribute: The total number of times that simple consult interaction that were distributed from queues that belong to this queue group, were accepted by an agent, voice-treatment port, IVR port, or nonagent- associated DN.</li> </ul>
	The description of this metric varies according to the attributes and filters in the report query:
Consult Abandoned Waiting	<ul> <li>Queue Attribute: The total number of times that simple consultations entered this queue and were abandoned before they could be established inside the short-abandoned threshold, where the consultations were associated with customer interactions.</li> </ul>
	<ul> <li>Queue Group Attribute: The total number of times that simple consultations entered queues that belong to this queue group and were abandoned before they could be established inside the <b>short-abandoned threshold</b> where the consultations were associated with customer interactions.</li> </ul>
	This metric relies on the value of the <b>short-abandoned threshold</b> as configured in the <b>[agg-gim-thld-QUEUE-IXN]</b> section.
Consult Cleared	The description of this metric varies according to the attributes and filters in the report query:
	<ul> <li>Queue Attribute: The total number of times that simple consult interactions were cleared from this virtual queue, workbin, or interaction queue.</li> </ul>
	<ul> <li>Queue Group Attribute: The total number of times that simple consult interactions were cleared from virtual queues, workbins, or interaction queues that belong to this queue group.</li> </ul>

Metric	Description
	Interactions can be cleared for many reasons. Refer to the Cleared Queue metric for a listing of these reasons.
Consult Stuck	The description of this metric varies according to the attributes and filters in the report query:
	<ul> <li>Queue Attribute: The total number of times that simple consult interactions were cleared from this virtual queue, workbin, or interaction queue because they were identified as being stuck (that is, having a technical result of StuckCall).</li> </ul>
	<ul> <li>Queue Group Attribute: The total number of times that simple consult interactions were cleared from virtual queues, workbins, or interaction queues that belong to this queue group because the interactions were identified as being stuck (that is, having a technical result of StuckCall).</li> </ul>
	Interactions can be cleared for other reasons. Refer to the Cleared Queue metric for a listing of these reasons.
Other Consults	Calculated as the difference between the value of the Consult Cleared metric and the value of the Consult Stuck metric. The description of this metric varies according to the attributes and filters in the report query:
	<ul> <li>Queue Attribute: The total number of times that simple consult interactions were cleared from this virtual queue, workbin, or interaction queue because a reason other than being identified as stuck.</li> </ul>
	<ul> <li>Queue Group Attribute: The total number of times that simple consult interactions were cleared from virtual queues, workbins, or interaction queues that belong to this queue group for any reason other than being identified as stuck.</li> </ul>
Consult Redirected	The description of this metric varies according to the attributes and filters in the report query:
	<ul> <li>Queue Attribute: The total number of times that collaborations or simple consult interactions entered this queue, rang at a routing target, and were redirected upon no acceptance/ answer by an agent.</li> </ul>
	<ul> <li>Queue Group Attribute: The total number of times that collaborations or simple consult interactions entered queues that belong to this queue group, rang at a routing target, and were</li> </ul>

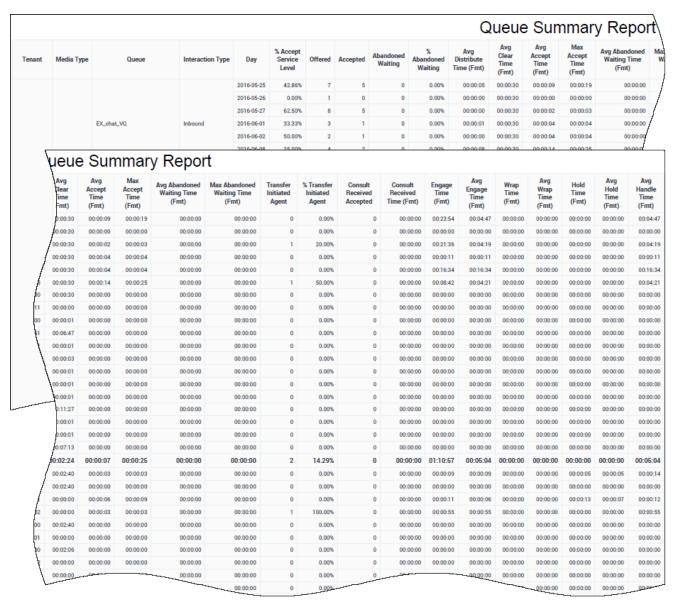
Metric	Description
	redirected upon no acceptance/answer by an agent.
Consult Abandoned Inviting	<ul> <li>The description of this metric varies according to the attributes and filters in the report query:</li> <li>Queue Attribute: The total number of times that consult interactions that were distributed or pulled from this queue were abandoned or dropped for any reason while the interactions were alerting or ringing at an agent.</li> <li>Queue Group Attribute: The total number of times that consult interactions that were distributed or pulled from queues that belong to this queue group were abandoned or dropped for any reason while the interactions were alerting or ringing at an agent.</li> </ul>
Consult Routed Other	<ul> <li>The description of this metric varies according to the attributes and filters in the report query:</li> <li>Queue Attribute: The total number of times that consult interactions entered this queue and were subsequently routed either to other mediation DNs or to unmonitored resources.</li> <li>Queue Group Attribute: The total number of times that consult interactions entered queues that belong to this queue group and were subsequently routed either to other mediation DNs or to unmonitored resources.</li> </ul>
Consult Received Accepted	<ul> <li>The description of this metric varies according to the attributes and filters in the report query:</li> <li>Queue Attribute: The total number of times that agents received collaborations or simple consultations that were distributed or pulled from this queue and associated with customer interactions.</li> <li>Queue Group Attribute: The total number of times that agents received collaborations or simple consultations that were distributed or pulled from queues that belong to this queue group and associated with customer interactions.</li> </ul>
Consult Accepted Others	The description of this metric varies according to the attributes and filters in the report query:  • Queue Attribute: The total number of simple consult interactions or collaborations that

Metric	Description
	entered this queue and were subsequently distributed and accepted by a resource other than an agent, place DN, or extension DN.
	<ul> <li>Queue Group Attribute: The total number of simple consult interactions or collaborations that entered queues that belong to this queue group and were subsequently distributed and accepted by a resource other than an agent, place DN, or extension DN.</li> </ul>
	This metric is calculated as the difference between the total number of interactions that were accepted and the total number of interactions that were accepted by an agent resource.
	The description of this metric varies according to the attributes and filters in the report query:
Consult Standard Abandoned Waiting	<ul> <li>Queue Attribute: The total number of simple consult interactions that entered this queue and were abandoned or dropped for any reason beyond the short-abandoned threshold and before the consultations could be established.</li> </ul>
	<ul> <li>Queue Group Attribute: The total number of simple consult interactions that entered queues that belong to this queue group and were abandoned or dropped for any reason beyond the short-abandoned threshold and before the consultations could be established.</li> </ul>
	This metric excludes consultations that were abandoned while they were alerting at a handling resource. This metric relies on the value of the <b>short-abandoned threshold</b> as configured in the <b>[agg-gim-thld-QUEUE-IXN]</b> section.
	The description of this metric varies according to the attributes and filters in the report query:
Consult Short Abandoned Waiting	<ul> <li>Queue Attribute: The total number of times that requests for consultation entered this queue and were abandoned within the <b>short-</b> <b>abandoned threshold</b> where the consultations were associated with customer interactions.</li> </ul>
	<ul> <li>Queue Group Attribute: The total number of times that requests for consultation entered queues that belong to this queue group and were abandoned within the <b>short-abandoned</b> <b>threshold</b> where the consultations were associated with customer interactions.</li> </ul>
	The count excludes collaborations and consultations that were abandoned after distribution. This metric relies on the value of the <b>short-abandoned threshold</b> as configured in the <b>[agg-gim-thld-QUEUE-IXN]</b> section.

# Queue Summary Report

This page describes how you can use the (**Queues** folder) Queue Summary Report to assess the performance of configured queues in your contact center.

### Understanding the Queue Summary Report



This report provides detailed information about interactions that enter each queue and that are either abandoned, or distributed and handled by any routing target, such as an agent. Information is organized by Media Type, Queue, and Interaction Type, and an extensive list of call handling and disposition metrics is collected to track call acceptance, wait times, abandonment rates, handling, distribution, consultations, and other metrics.

Use this report to assess the performance of configured queues, to understand what percentage of interactions in each queue were accepted within the defined service level, and to compare the performance of each queue in handling interactions.

To get a better idea of what this report looks like, view sample output from the report: HRCXIQueueSummaryReport.pdf

The following tables explain the prompts you can select when you generate the report, and the metrics and attributes that are represented in the report:

### Prompts for the Queue Summary Report

Prompt	Description
Pre-set Date Filter	From the list, choose a time period on which to report, and move it to the Selected list.
Start Date	Choose the first day from which to gather report data.
End Date	Choose the last day from which to gather report data.
Queue Group	Optionally, select a queue group on which to report.
Queue	Optionally, select a queue on which to report.
Media Type	Optionally, select the type of media to include in the report—for example, VOICE, EMAIL, and CHAT.
Interaction Type	Optionally, select the type of interaction to include in the report—for example, Inbound, Outbound, and Internal.
Tenant	For multi-tenant environments, optionally select the tenant(s) for which to include data in the report.

### Attributes used in the Queue Summary Report

Attribute	Description
Tenant	This attribute enables data within the reporting interval to be organized by tenant.
Media Type	This attribute enables data to be organized by the interaction's media type—for example, VOICE,

Attribute	Description
	EMAIL, and CHAT.
Queue	This attribute enables data within the reporting interval to be organized by the name of the ACD queue, virtual queue, interaction queue, or workbin.
Interaction Type	This attribute enables data to be organized by the interaction's type—for example, Inbound, Outbound, and Internal.
Day	This attribute enables data within the reporting interval to be organized by a particular day within a month and year. Day values are presented in YYYY-MM-DD format.

# Metrics used in the Queue Summary Report

Metric	Description
	The description of this metric varies according to the attributes and filters in the report query:
	<ul> <li>Queue Attribute: The service level of this queue measured as a percentage of interactions that entered this queue and were accepted within the acceptance threshold, relative to all interactions that entered this queue and were offered to a resource.</li> </ul>
%Accept Service Level	<ul> <li>Queue Group Attribute: The service level of this queue group measured as a percentage of interactions that entered queues that belong to this queue group and were accepted within the acceptance threshold, relative to all interactions that entered queues that belong to this queue group and were offered to a resource.</li> <li>This metric yields results other than 0 only for interactions that were accepted by an agent. This metric relies on the value of the acceptance threshold as configured in the [agg-gim-thld-QUEUE-IXN] section.</li> </ul>
Offered	The description of this metric varies according to the attributes and filters in the report query:  • Queue Attribute: The total number of interactions that entered this queue and were subsequently offered to a resource.
	<ul> <li>Queue Group Attribute: The total number of interactions that entered queues that belong to this queue group and were subsequently offered to a resource.</li> </ul>

Metric	Description
	This metric excludes short-abandoned interactions and includes handling attempts that agents rejected, as well as consultation calls, conferences, and collaborations that agents received. This metric relies on the value of the <b>short-abandoned threshold</b> as configured in the <b>[agg-gim-thld-QUEUE-IXN]</b> section.
Accepted	<ul> <li>The description of this metric varies according to the attributes and filters in the report query:</li> <li>Queue Attribute: The total number of times that customer interactions and warm consultations that were distributed from this queue, were accepted, answered, or pulled by an agent, voice-treatment port, IVR port, or nonagent-associated DN (such as contact center resources that can alert).</li> <li>Queue Group Attribute: The total number of times that customer interactions and warm consultations that were distributed from queues that belong to this queue group, were accepted, answered, or pulled by an agent, voice-treatment port, IVR port, or nonagent-associated DN.</li> </ul>
Abandoned Waiting	<ul> <li>The description of this metric varies according to the attributes and filters in the report query:</li> <li>Queue Attribute: The total number of times that customer interactions entered this queue and were abandoned or dropped for any reason before the interactions could be distributed.</li> <li>Queue Group Attribute: The total number of times that customer interactions entered queues that belong to this queue group and were abandoned or dropped for any reason before the interactions could be distributed.</li> <li>The count includes short-abandoned interactions and excludes interactions that were abandoned after distribution, such as abandoned-while-inviting interactions.</li> </ul>
% Abandoned Waiting	<ul> <li>The description of this metric varies according to the attributes and filters in the report query:</li> <li>Queue Attribute: The percentage of customer interactions that both entered this queue and were subsequently abandoned before the interactions could be distributed, relative to the total number of interactions that entered this queue.</li> <li>Queue Group Attribute: The percentage of customer interactions that both entered queues that belong to this queue group and were</li> </ul>

Metric	Description
	subsequently abandoned before the interactions could be distributed, relative to the total number of interactions that entered a queue that belongs to this queue group.
Avg Distribute Time (Fmt)	<ul> <li>The description of this metric varies according to the attributes and filters in the report query:</li> <li>Queue Attribute: The average amount of time (HH:MM:SS) that customer interactions or established warm consultations spent in this queue before they were distributed.</li> <li>Queue Group Attribute: The average amount of time (HH:MM:SS) in seconds, that customer interactions or established warm consultations spent in queues that belong to this queue group before they were distributed.</li> </ul>
Avg Clear Time (Fmt)	<ul> <li>The description of this metric varies according to the attributes and filters in the report query:</li> <li>Queue Attribute: The average amount of time (HH:MM:SS) that customer interactions spent in a queue before they were cleared from this virtual queue.</li> <li>Queue Group Attribute: The average amount of time (HH:MM:SS) that customer interactions spent in a queue before they were cleared from virtual queues that belong to this queue group.</li> </ul>
Avg Accept Time (Fmt)	<ul> <li>The description of this metric varies according to the attributes and filters in the report query:</li> <li>Queue Attribute: The average amount of time (HH:MM:SS) that customers waited before their interactions—distributed from this queue—were accepted by a handling resource.</li> <li>Queue Group Attribute: The average amount of time (HH:MM:SS) that customers waited before their interactions—distributed from queues that belong to the queue group—were accepted by a handling resource.</li> <li>This metric is identical to Queue\ASA.</li> </ul>
Max Accept Time (Fmt)	<ul> <li>The description of this metric varies according to the attributes and filters in the report query:</li> <li>Queue Attribute: The longest amount of time (HH:MM:SS) that customer interactions that were distributed from this queue spent in a</li> </ul>

Metric	Description
	queue before they were accepted by the target resource.  • Queue Group Attribute: The longest amount of time (HH:MM:SS) that customer interactions that were distributed from queues that belong to this queue group, spent in a queue before they were accepted by the target resource.  Duration starts when the interaction enters the member queue and ends when the interaction is accepted—thereby, including alert (ring) time.
Avg Abandoned Waiting Time (Fmt)	<ul> <li>The description of this metric varies according to the attributes and filters in the report query:</li> <li>Queue Attribute: The average amount of time (HH:MM:SS) that customer interactions spent at this queue before they were abandoned or dropped for any reason.</li> <li>Queue Group Attribute: The average amount of time (HH:MM:SS) that customer interactions spent at queues that belong to this queue group before they were abandoned or dropped for any reason.</li> <li>This average includes the duration and count of shortabandoned interactions.</li> </ul>
Max Abandoned Waiting Time (Fmt)	<ul> <li>The description of this metric varies according to the attributes and filters in the report query:</li> <li>Queue Attribute: The longest amount of time (HH:MM:SS) that customers waited at this queue before abandoning the interactions and before the interactions could be distributed.</li> <li>Queue Group Attribute: The longest amount of time (HH:MM:SS) that customers waited at queues that belong to this queue group before abandoning the interactions and before the interactions could be distributed.</li> </ul>
Transfer Initiated Agent	<ul> <li>The description of this metric varies according to the attributes and filters in the report query:</li> <li>Queue Attribute: The total number of times that agents transferred customer interactions that were distributed or pulled from this queue.</li> <li>Queue Group Attribute: The total number of times that agents transferred customer interactions that were distributed or pulled from queues that belong to this queue group.</li> </ul>

Metric	Description
	Both warm and blind transfers are reflected in this metric.
	The description of this metric varies according to the attributes and filters in the report query:
%Transfer Initiated Agent	<ul> <li>Queue Attribute: The percentage of customer interactions that entered this queue, were distributed, were accepted, and subsequently were transferred (warm or blind) by agents, relative to the total number of interactions that entered this queue and were distributed and accepted by agents.</li> </ul>
	<ul> <li>Queue Group Attribute: The percentage of customer interactions that entered queues that belong to this queue group, were distributed, were accepted, and subsequently were transferred (warm or blind) by agents, relative to the total number of interactions that entered queues that belong to this queue group and were distributed and accepted by agents.</li> </ul>
	The description of this metric varies according to the attributes and filters in the report query:
Consult Received Accepted	<ul> <li>Queue Attribute: The total number of times that agents received collaborations or simple consultations that were distributed or pulled from this queue and associated with customer interactions.</li> </ul>
	<ul> <li>Queue Group Attribute: The total number of times that agents received collaborations or simple consultations that were distributed or pulled from queues that belong to this queue group and associated with customer interactions.</li> </ul>
	The description of this metric varies according to the attributes and filters in the report query:
Consult Received Time (Fmt)	<ul> <li>Queue Attribute: The total amount of time (HH:MM:SS) that agents were engaged as recipients in collaborations or simple consultations that were distributed or pulled from this queue.</li> <li>Queue Group Attribute: The total amount of time (HH:MM:SS) that agents were engaged as recipients in collaborations or simple consultations that were distributed or pulled from queues that belong to this queue group.</li> </ul>
	This metric includes hold duration that is associated with the collaboration/consultation.

Metric	Description
	The description of this metric varies according to the attributes and filters in the report query:
	<ul> <li>Queue Attribute: For customer interactions that were distributed or pulled from this queue, the total amount of time (HH:MM:SS) that agents were engaged with customers.</li> </ul>
Engage Time (Fmt)	<ul> <li>Queue Group Attribute: For customer interactions that were distributed or pulled from queues that belong to this queue group, the total amount of time (HH:MM:SS) that agents were engaged with customers.</li> </ul>
	This metric excludes other interaction-related durations, such as hold time, ACW (Wrap) time, alert (ring) time and the time that is associated with consultations and collaborations that the agent received.
	The description of this metric varies according to the attributes and filters in the report query:
Avg Engage Time (Fmt)	<ul> <li>Queue Attribute: For customer interactions that were distributed or pulled from this queue, the average amount of time (HH:MM:SS) that agents were engaged with customers.</li> </ul>
	<ul> <li>Queue Group Attribute: For customer interactions that were distributed or pulled from queues that belong to this queue group, the average amount of time (HH:MM:SS) that agents were engaged with customers.</li> </ul>
	The description of this metric varies according to the attributes and filters in the report query:
Wrap Time (Fmt)	<ul> <li>Queue Attribute: The total amount of time (HH:MM:SS) that agents spent performing after- call work for customer interactions that were distributed from this queue.</li> </ul>
	<ul> <li>Queue Group Attribute: The total amount of time (HH:MM:SS) that agents spent performing after-call work for customer interactions that were distributed from queues that belong to this queue group.</li> </ul>
	The description of this metric varies according to the attributes and filters in the report query:
Avg Wrap Time (Fmt)	<ul> <li>Queue Attribute: The average amount of time (HH:MM:SS) that agents spent performing after- call work for customer interactions that were distributed from this queue.</li> </ul>
	Queue Group Attribute: The average amount of

Metric	Description
	time (HH:MM:SS) that agents spent performing after-call work for customer interactions that were distributed from queues that belong to this queue group.
Hold Time (Fmt)	<ul> <li>The description of this metric varies according to the attributes and filters in the report query:</li> <li>Queue Attribute: The total amount of time, in seconds, that agents had customer interactions that were distributed from this queue on hold.</li> <li>Queue Group Attribute: The total amount of time, in seconds, that agents had customer interactions that were distributed from queues that belong to this queue group on hold.</li> <li>This time starts when the interaction is placed on hold and ends when it is retrieved, dropped, transferred, or completed.</li> </ul>
Avg Hold Time (Fmt)	<ul> <li>The description of this metric varies according to the attributes and filters in the report query:</li> <li>Queue Attribute: The average amount of time (HH:MM:SS) that agents had customers on hold for interactions that were distributed from this queue.</li> <li>Queue Group Attribute: The average amount of time (HH:MM:SS) that agents had customers on hold for interactions that were distributed from queues that belong to this queue group.</li> <li>This metric is attributed to the interval in which interactions entered the queue which can differ from the interval that interactions were placed on hold.</li> </ul>
Avg Handle Time (Fmt)	<ul> <li>The description of this metric varies according to the attributes and filters in the report query:</li> <li>Queue Attribute: The average amount of time (HH:MM:SS) that agents spent handling customer interactions or warm consultations that were distributed or pulled from this queue.</li> <li>Queue Group Attribute: The average amount of time (HH:MM:SS) that agents spent handling customer interactions or warm consultations that were distributed or pulled from queues that belong to this queue group.</li> <li>This metric is computed as handle time divided by the sum of agent-accepted interactions and simple consult interactions that agents received. This metric is attributed to the interval in which interactions entered the queue.</li> </ul>

# Speed Of Accept (hours) Report

This page describes how you can use the (**Queues** folder) Speed Of Accept (hours) Report to understand how long interactions waited in queue before being accepted.

### Understanding the Speed Of Accept (hours) Report

													Sp	eed (	of Ac	ccept	1
Tenant	Me	edia Type	Time Range	Key	Day	Queue	Interaction	туре	Accept Agent 1			Accepted Agent St				Accepted Agent ST 7	
						8001	Internal			5	0		0	0 0	0	0 /	
						8002	Internal			10	0		0	0 0	0	0/	
					2011-04-11	8003	Internal			3	0		0	0 0	0	4	
						8004	Internal			1	0		0	0 0	0		
	þt	Accepted Agent ST	Accepted Agent ST	Acces Agen	t ST AC	% cepted ent ST	% Accepted Agent ST 2	% Accep Agent		% Accepted Agent ST 4	Acce Agen		% Accepted Agent ST 6	% Accepted Agent ST 7	% Accepted Agent ST 8	% Accepted Agent ST 9	% Accepte Agent S
	0	0	0		0	100.00%	0.00%	(	0.00%	0.00%		0.00%	0.00%	0.00%	0.00%	0.00%	0.0
	0	0	0		0	100.00%	0.00%	(	0.00%	0.00%		0.00%	0.00%	0.00%	0.00%	0.00%	0.0
/	0	0	0		0	100.00%	0.00%	(	0.00%	0.00%		0.00%	0.00%	0.00%	0.00%	0.00%	0.0
vironmen	0	0	0		0	100.00%	0.00%	(	0.00%	0.00%		0.00%	0.00%	0.00%	0.00%	0.00%	0.0
\	0	0	0		0	100.00%	0.00%	(	0.00%	0.00%		0.00%	0.00%	0.00%	0.00%	0.00%	0.0
/	0	0	0		0	100.00%	0.00%	(	0.00%	0.00%		0.00%	0.00%	0.00%	0.00%	0.00%	0.
	0	0	0		0	100.00%	0.00%	(	0.00%	0.00%		0.00%	0.00%	0.00%	0.00%	0.00%	0.
	0	0	0		0	100.00%	0.00%	(	0.00%	0.00%		0.00%	0.00%	0.00%	0.00%	0.00%	0.0
	0	0	0		0	100.00%	0.00%	(	0.00%	0.00%		0.00%	0.00%	0.00%	0.00%	0.00%	0.0
	o	0	0		0	100.00%	0.00%	(	0.00%	0.00%		0.00%	0.00%	0.00%	0.00%	0.00%	0.0
	0	0	0		0	100.00%	0.00%	(	0.00%	0.00%		0.00%	0.00%	0.00%	0.00%	0.00%	0.0
	0	0	0		0	100.00%	0.00%	(	0.00%	0.00%		0.00%	0.00%	0.00%	0.00%	0.00%	0.
	0	0	0		0	100.00%	0.00%	(	0.00%	0.00%		0.00%	0.00%	0.00%	0.00%	0.00%	0.
,	0	0	0		0	100.00%	0.00%	(	0.00%	0.00%		0.00%	0.00%	0.00%	0.00%	0.00%	0.
1	0	0	0		0	100.00%	0.00%	(	0.00%	0.00%		0.00%	0.00%	0.00%	0.00%	0.00%	0.
	0	0	0		0	100.00%	0.00%	(	0.00%	0.00%		0.00%	0.00%	0.00%	0.00%	0.00%	0.
	0	0	0		0	100.00%	0.00%	(	0.00%	0.00%		0.00%	0.00%	0.00%	0.00%	0.00%	0.
1	٠ 0	0	0		0	100.00%	0.00%	(	0.00%	0.00%		0.00%	0.00%	0.00%	0.00%	0.00%	0.

This report provides summarized performance information about the delays that are associated with long-lasting interactions that were accepted or pulled from the specified queues, providing both percentages and number of interactions that were accepted or pulled by service time interval. This report is most useful for media types for which contact center responses are expected to be slow, such as email.

The report breaks down the count of interactions placing each into one of ten time buckets according to the speed by which the interaction was accepted or pulled from the selected queue. "Acceptance" is triggered by the first agent who creates an outbound reply—whether or not the reply was sent.

The report also provides a breakdown for the percentages of interactions that were accepted/pulled in these buckets, relative to the total number of interactions accepted/pulled from the queue during

the reporting interval. The first bucket is defined by a report variable (Accepted Agent ST1 - ST11) that amalgamates the 1st through 11th service time intervals. The Accepted Agent STI variable amalgamates all service time intervals.

This report reflects distribution from the selected queues only. It does not reflect the time that interactions spent queued at other unselected queue resources that the interactions might have passed through before being distributed from the queue resource(s) selected in this report.

To get a better idea of what this report looks like, view sample output from the report: HRCXISpdOfAccptHoursReport.pdf

The following tables explain the prompts you can select when you generate the report, and the metrics that are represented in the report:

### Prompts for the Speed Of Accept (hours) Report

Prompt	Description
Pre-set Date Filter	From the list, choose a time period on which to report, and move it to the <b>Selected</b> list.
Start Date	Choose the first day from which to gather report data.
End Date	Choose the last day from which to gather report data.
Queue Group	Optionally, select a queue group on which to report.
Queue	Optionally, select a queue on which to report.
Media Type	Optionally, select the type of media to include in the report—for example, VOICE, EMAIL, and CHAT.
Interaction type	Optionally, select an interaction type on which to report.
Tenant	For multi-tenant environments, optionally select the tenant(s) for which to include data in the report.

### Attributes for the Speed Of Accept (hours) Report

Attribute	Description
Tenant	This attribute enables data within the reporting interval to be organized by tenant.
Media Type	This attribute enables data to be organized by the interaction's media type—for example, VOICE, EMAIL, and CHAT.
TimeRangeKey	This attribute enables the identification of time- range boundaries by tenant. These boundaries

Attribute	Description
	define the upper and lower limits for the service- time intervals that are used by the Speed of Accept and Abandon Delay reports.
Queue	This attribute enables data within the reporting interval to be organized by the name of the ACD queue, virtual queue, interaction queue, or workbin.
Interaction Type	This attribute enables data to be organized by the interaction's type—for example, Inbound, Outbound, and Internal.
Day	This attribute enables data within the reporting interval to be organized by a particular day within a month and year. Day values are presented in YYYY-MM-DD format.

# Metrics used in the Speed Of Accept (hours) Report

Metric	Description				
Accepted Agent ST1	The total number of times that interactions entered this queue and were subsequently distributed and accepted, answered, or pulled by an agent prior to the first service time interval threshold. If the first service time threshold is not defined, this metric uses no limit as the upper boundary of the service time interval.  Speed-of-accept thresholds are defined within the agg-gim-thld-QUEUE-ACC section.				
Accepted Agent ST2 Accepted Agent ST10	The total number of times that interactions entered this queue and were subsequently distributed and accepted, answered, or pulled by an agent within the service time interval that is bound by the two indicated service time thresholds. If the lower service time threshold is not defined, this metric returns 0. If the upper service time threshold is not defined, this metric uses no limit as the upper boundary of the service time interval.  For example, Accepted Agent ST2 is the total number of times that interactions entered this queue and were subsequently distributed and accepted, answered, or pulled by an agent within the service time interval that is bound by the first and second service time thresholds. In this example, if the first service time threshold is not defined, this metric returns 0. If the second service time threshold is not defined, this metric uses no limit as the upper boundary of the service time interval.  Speed-of-accept thresholds are defined within the agg-gim-thld-QUEUE-ACC section.				
% Accepted Agent ST1	The percentage of interactions that entered this queue and were subsequently distributed and				

Metric	Description
	accepted by agents prior to the first service time interval threshold, relative to the total number of customer interactions that entered this queue and were subsequently distributed and accepted by agents.
% Accepted Agent ST2 % Accepted Agent ST10	The percentage of interactions that entered this queue and were subsequently distributed and accepted by agents within the service time interval that is bound by the indicated service time thresholds, relative to the total number of customer interactions that entered this queue and were subsequently distributed and accepted by agents.  For example, % Accepted Agent ST10 is the percentage of interactions that entered this queue and were subsequently distributed and accepted by agents within the service time interval that is bound by the <i>ninth</i> and <i>tenth</i> service time thresholds, relative to the total number of customer interactions that entered this queue and were subsequently distributed and accepted by agents.

#### Tip

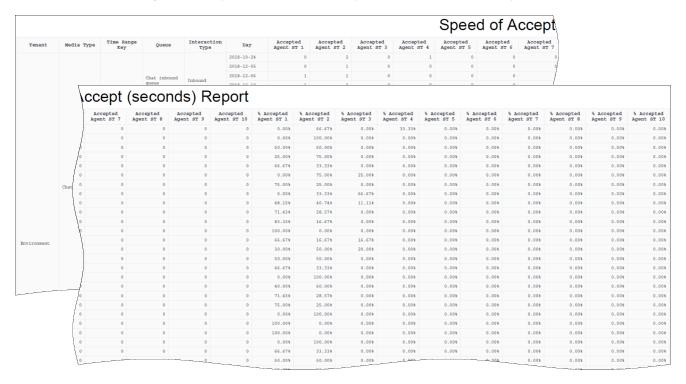
Speed-of-accept thresholds are defined within the agg-gim-thld-QUEUE-ACC section. To modify them, use Configuration Manager (or GAX, depending on your environment), find the agg-gim-thld-QUEUE-ACC section of GIM application options, and change or add appropriate values for desired thresholds.

To learn more about the metrics and attributes used in the reports, and about additional metrics and attributes that can be used to customize reports, see the *Genesys CX Insights Projects Reference Guide*.

# Speed Of Accept (seconds) Report

This page describes how you can use the (**Queues** folder) Speed Of Accept (seconds) Report to understand how long interactions waited in queue before being accepted.

### Understanding the Speed Of Accept (seconds) Report



This report provides summarized performance information about the delays that are associated with long-lasting interactions that were accepted or pulled from the specified queue, providing both percentages and numbers of interactions that were accepted or pulled by service time interval. This report is most useful for media types for which contact center responses are expected to be fast, such as voice and chat.

The report shows the number of interactions that were accepted within each of 10 time buckets, and the percentages of interactions that were accepted in these buckets relative to the total number of interactions that were accepted from the queue. The 10th bucket is defined by a report variable (Accepted Agent ST1 - ST10) that amalgamates the first through 10th service time intervals. The Accepted Agent STI variable amalgamates all service time intervals.

This report reflects distribution from the selected mediation DNs only. The report does not reflect:

· the customer's overall wait time

• the durations that interactions spent queued at other unselected queue resources that the interactions may have passed through before being distributed from the mediation DN(s) provided in this report.

To get a better idea of what this report looks like, view sample output from the report: HRCXISpdOfAccptSecondsReport.pdf

The following tables explain the prompts you can select when you generate the report, and the metrics that are represented in the report:

## Prompts for the Speed Of Accept (seconds) Report

Prompt	Description
Pre-set Date Filter	From the list, choose a time period on which to report, and move it to the <b>Selected</b> list.
Start Date	Choose the first day from which to gather report data.
End Date	Choose the last day from which to gather report data.
Queue Group	Optionally, select a queue group on which to report.
Queue	Optionally, select a queue on which to report.
Media Type	Optionally, select the type of media to include in the report—for example, VOICE, EMAIL, and CHAT.
Interaction type	Optionally, select an interaction type on which to report.
Tenant	For multi-tenant environments, optionally select the tenant(s) for which to include data in the report.

### Attributes for the Speed Of Accept (seconds) Report

Attribute	Description
Tenant	This attribute enables data within the reporting interval to be organized by tenant.
Media Type	This attribute enables data to be organized by the interaction's media type—for example, VOICE, EMAIL, and CHAT.
Time Range Key	This attribute enables the identification of time- range boundaries by tenant. These boundaries define the upper and lower limits for the service- time intervals that are used by the Speed of Accept and Abandon Delay reports.
Queue	This attribute enables data within the reporting interval to be organized by the name of the ACD

Attribute	Description
	queue, virtual queue, interaction queue, or workbin.
Interaction Type	This attribute enables data to be organized by the interaction's type—for example, Inbound, Outbound, and Internal.
Day	This attribute enables data within the reporting interval to be organized by a particular day within a month and year. Day values are presented in YYYY-MM-DD format.

## Metrics used in the Speed Of Accept (seconds) Report

Metric	Description
Accepted Agent ST1	The total number of times that interactions entered this queue and were subsequently distributed and accepted, answered, or pulled by an agent prior to the first service time interval threshold. If the first service time threshold is not defined, this metric uses no limit as the upper boundary of the service time interval.  Speed-of-accept thresholds are defined within the [agg-gim-thid-QUEUE-ACC] section.
Accepted Agent ST2 Accepted Agent ST10	The total number of times that interactions entered this queue and were subsequently distributed and accepted, answered, or pulled by an agent within the service time interval that is bound by the two indicated service time thresholds. If the lower service time threshold is not defined, this metric returns 0. If the upper service time threshold is not defined, this metric uses no limit as the upper boundary of the service time interval.  For example, Accepted Agent ST2 is the total number of times that interactions entered this queue and were subsequently distributed and accepted, answered, or pulled by an agent within the service time interval that is bound by the first and second service time thresholds. In this example, if the first service time threshold is not defined, this metric returns 0. If the second service time threshold is not defined, this metric uses no limit as the upper boundary of the service time interval.  Speed-of-accept thresholds are defined within the [agg-gim-thid-QUEUE-ACC] section.
% Accepted Agent ST1	The percentage of interactions that entered this queue and were subsequently distributed and accepted by agents prior to the first service time interval threshold, relative to the total number of customer interactions that entered this queue and were subsequently distributed and accepted by agents.

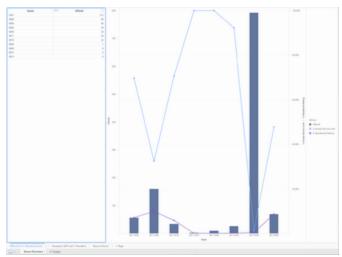
Metric	Description
% Accepted Agent ST2 % Accepted Agent ST10	The percentage of interactions that entered this queue and were subsequently distributed and accepted by agents within the service time interval that is bound by the indicated service time thresholds, relative to the total number of customer interactions that entered this queue and were subsequently distributed and accepted by agents.
	For example, % Accepted Agent ST10 is the percentage of interactions that entered this queue and were subsequently distributed and accepted by agents within the service time interval that is bound by the <i>ninth</i> and <i>tenth</i> service time thresholds, relative to the total number of customer interactions that entered this queue and were subsequently distributed and accepted by agents.

#### Tip

Speed-of-accept thresholds are defined within the agg-gim-thld-QUEUE-ACC section. To modify them, use Configuration Manager (or GAX, depending on your environment), find the agg-gim-thld-QUEUE-ACC section of GIM application options, and change or add appropriate values for desired thresholds.

To learn more about the metrics and attributes used in the reports, and about additional metrics and attributes that can be used to customize reports, see the *Genesys CX Insights Projects Reference Guide*.

# Weekly Queue Summary Dashboard



Weekly Queue Summary Dashboard: Offered Vs % Abandoned and % SL



Weekly Queue Summary Dashboard: Accepted, AHT, and % Transfers



Weekly Queue Summary Dashboard: Queue Volume

The (**Dashboards** and **Queues** folders) Weekly Queue Summary Dashboard provides visualizations you can use to assess the weekly performance of

configured queues, to understand what percentage of interactions in each queue were accepted within the defined service level, to detect high rates of abandonment, and to compare the performance of each queue in handling interactions.

### Understanding the Weekly Queue Summary Dashboard

The Weekly Queue Summary Dashboard presents queue information on three tabs:

- Offered Vs % Abandoned and % SL Use this combination line / bar graph to compare the number
  of interactions offered in a queue against the percentage that are either abandoned, or distributed and
  handled within the defined Service Level Threshold. Hover over the line graph to see details about
  the % Accept Service Level data for each week, or over the bar graph to see details about the volume
  of calls offered in that week.
- Accepted, AHT, and % Transfers Use these line graphs to contrast the Average Handle Time (AHT) and % Transfer Initiated Agent against the call volume in each configured queue. Hover over the line graph to see details about the Avg Handle Time or % Transfer Initiated Agent for each week,
- **Queue Volume** Use this heat map to explore the relative call volume for each queue. Each square shows values for key metrics hover over the square to see the metric names.

To get a better idea of what this dashboard looks like, view sample output from the dashboard:

#### SampleWeekly Queue Summary Dashboard.pdf

#### Link to video

The following tables explain the prompts you can select when you generate the dashboard, and the metrics and attributes that are represented in the dashboard:

### Prompts available for the Weekly Queue Summary Dashboard

The following table lists the prompts available for the Weekly Queue Summary Dashboard:

Prompt	Description
Pre-set Date Filter	From the convenient list of predefined dates, choose a date for which to run the report.
Start Date	Choose the first day from which to gather data into the dashboard.
End Date	Choose the last day from which to gather data into the dashboard.
Queue Group	Optionally, select one or more queue groups on which to focus the report.
Queue	Optionally, select one or more queues on which to focus the report.

Prompt	Description
Media Type	Optionally, select one or more media types to include in the report—for example, VOICE, EMAIL, and CHAT.
Interaction Type	Optionally, select the type of interaction to include in the report—for example, Inbound, Outbound, and Internal.
Tenant	For multi-tenant environments, optionally select one or more tenants on which to focus the report.

### Attributes used on the Weekly Queue Summary Dashboard

The following table lists the attributes used on the Weekly Queue Summary Dashboard

Attribute	Description
Queue	From the list, optionally select a value to focus on a specific ACD queue, virtual queue, interaction queue, or workbin.
Week	Enables data within the reporting interval to be organized by a particular week (1-53).

### Metrics used on the Weekly Queue Summary Dashboard

The following table lists the metrics used on the Weekly Queue Summary Dashboard:

Metric	Description
% Abandoned Waiting	The percentage of customer interactions that both entered this queue and were subsequently abandoned before the interactions could be distributed, relative to the total number of interactions that entered this queue.
% Accept Service Level	The service level of this queue measured as a percentage of interactions that entered this queue and were accepted within the acceptance threshold, relative to all interactions that entered this queue and were offered to a resource.  This metric yields results other than 0 only for interactions that were accepted by an agent. This metric relies on the value of the acceptance threshold as configured in the [agg-gim-thid-QUEUE-IXN] section.
% Transfer Initiated Agent	The percentage of customer interactions that entered this queue, were distributed, were accepted, and subsequently were transferred (warm or blind) by agents, relative to the total number of interactions that entered this queue and

Metric	Description
	were distributed and accepted by agents.
Accepted	The total number of times that customer interactions and warm consultations that were distributed from this queue, were accepted, answered, or pulled by an agent, voice-treatment port, IVR port, or nonagent-associated DN (such as contact center resources that can alert).
Avg Accept Time (Fmt)	The average amount of time (HH:MM:SS) that customers waited before their interactions—distributed from this queue—were accepted by a handling resource.
Avg Handle Time (Fmt)	The average amount of time (HH:MM:SS) that agents spent handling customer interactions or warm consultations that were distributed or pulled from this queue.
Offered	The total number of interactions that entered this queue and were subsequently offered to a resource.  The count excludes short-abandoned interactions and includes handling attempts that agents rejected, as well as warm consultations, conferences, and collaborations that agents received. This metric relies on the value of the short-abandoned threshold as configured in the [agg-gim-thld-QUEUE-IXN] section.
Transfer Initiated Agent	The total number of times that agents transferred customer interactions that were distributed or pulled from this queue.

To view more detailed information about the metrics and attributes in this dashboard, and other metrics and attributes that can be used to customize reports, see the *Genesys CX Insights Projects Reference Guide*.

## Additional resources

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

### Genesys CX Insights

Documentation for Genesys Customer Experience Insights (CX Insights) is available on the Genesys Documentation website:

- Genesys CX Insights Deployment Guide, which will help you install, start, stop, and uninstall the Genesys-provided image of MicroStrategy and the CX Insights Project and reports.
- *Genesys CX Insights User's Guide*, which includes a report- customization example that displays aggregated results that are sectioned by your own custom user data.
- Genesys CX Insights Projects Reference Guide, which describes objects that are used in Genesys CX
  Insights projects and reports, focusing on metrics, attributes, and the folders that are used to organize
  them.
- Genesys CX Insights Hardware Sizing Guide, which provides information about hardware sizing for typical contact center scenarios.
- Genesys CX Insights Release Notes, Product Alerts, and What's New are available on the GCXI page of the Genesys documentation site.

#### MicroStrategy

Documentation for MicroStrategy software is available on the MicroStrategy Learning Center or Help page, or in an electronic format that you can download to your mobile device (QR codes).

Easy search for MicroStrategy topics

• MicroStrategy Community Search Page

#### Tip

On the Community Search Page, filter your search results by selecting the Document Version (such as **2020**).

Following are some popular topics, and where to find information about them on the MicroStrategy Wiki:

#### The latest information from MicroStrategy

- What's New in MicroStrategy
- Key information about MicroStrategy Web
- Key information about MicroStrategy Developer

#### Analyzing data in a MicroStrategy report or dashboard

- Basic Reporting Guide
- Mobile Analysis Guide

#### Creating dashboards and reports

- · Enterprise Reporting
  - Document Creation Guide
  - Dashboard and Widgets Guide
- Slice and Dice Analysis
  - Basic Reporting Guide
  - Advanced Reporting Guide
- Advanced and Predictive Analysis
  - · Advanced Reporting Guide
  - Function Reference Guide
- Alerts and Proactive Notification
  - System Administration Guide
  - Mobile Analysis Guide
- OLAP Analysis
  - In-memory Analytics Guide
- · Integrate data reporting with Microsoft Office
  - MicroStrategy Office User Guide

#### Installing or upgrading MicroStrategy

- Installation and Configuration Guide
- Upgrade Guide

#### Modelling your data and designing a project

· Project Design Guide

• MDX Cube Reporting Guide

#### Configuring and Administering MicroStrategy

- System Administration Guide
- Timeout settings in MicroStrategy Web
- User Session Idle Timeout

#### MicroStrategy Quick Start

· Quick Start Guide

#### Docker

About Docker

#### **Kubernetes Installation**

- Kubernetes Getting Started
- · Installing kubeadm

#### OpenShift

OpenShift documentation

#### Helm

Helm documentation

### Genesys Info Mart

Documentation for Genesys Info Mart is available on the Genesys Documentation website:

- Genesys Info Mart Operations Guide, for information about Genesys Info Mart jobs such as Job AggregateGIM and the Genesys Info Mart Manager for managing Genesys Info Mart jobs.
- Genesys Info Mart Deployment Guide, for information about configuring the Genesys Info Mart and Interaction Concentrator servers to recognize user data.

### Reporting and Analytics Aggregates

Documentation for Reporting and Analytics Aggregates (RAA) is available on the Genesys Documentation website:

- Reporting and Analytics Aggregates Deployment Guide, which describes the runtime parameters and configuration options mentioned in this document.
- Reporting and Analytics Aggregates User's Guide, which describes the different modes of running aggregation, the aggregation hierarchies, and how to configure Reporting and Analytics Aggregates (RAA) to aggregate data based on these user-defined dimensions.
- The Physical Data Model documentation for your RDBMS, which describes the aggregate tables and subject areas:
  - Reporting and Analytics Aggregates Physical Data Model for a Microsoft SQL Server Database
  - Reporting and Analytics Aggregates Physical Data Model for an Oracle Database
  - Reporting and Analytics Aggregates Physical Data Model for a PostgreSQL Database

#### Genesys

Additional documentation for Genesys products is available, as follows:

- The Genesys Glossary provides a comprehensive list of the Genesys and computer-telephony integration (CTI) terminology and acronyms.
- *Genesys Migration Guide*, available on the *Genesys Documentation website*, provides documented migration strategies for Genesys product releases. Contact Genesys Customer Care for more information.
- Release Notes and Product Advisories for each Genesys product, which are available on the Genesys
   Documentation website.

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

- The Genesys CX Insights page in the Genesys Supported Operating Environment Reference Guide
- Genesys Supported Media Interfaces Reference Manual
- Genesys Hardware Sizing Guide, which provides information about Genesys hardware sizing guidelines
  for the Genesys 8.x releases. For additional system-wide planning tools and information, see the
  release-specific listings of System-Level Documents on the Genesys Documentation website
  (docs.genesys.com).

Other Genesys product documentation is available on the:

- Genesys My Support website (formerly Customer Care)
- Genesvs Documentation website
- Genesys Documentation Library DVD, which you can order by email from Genesys Order Management at Genesys Order Management.