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Genesys Customer Experience Insights User's Guide

Capture Point Dashboard

4/25/2025

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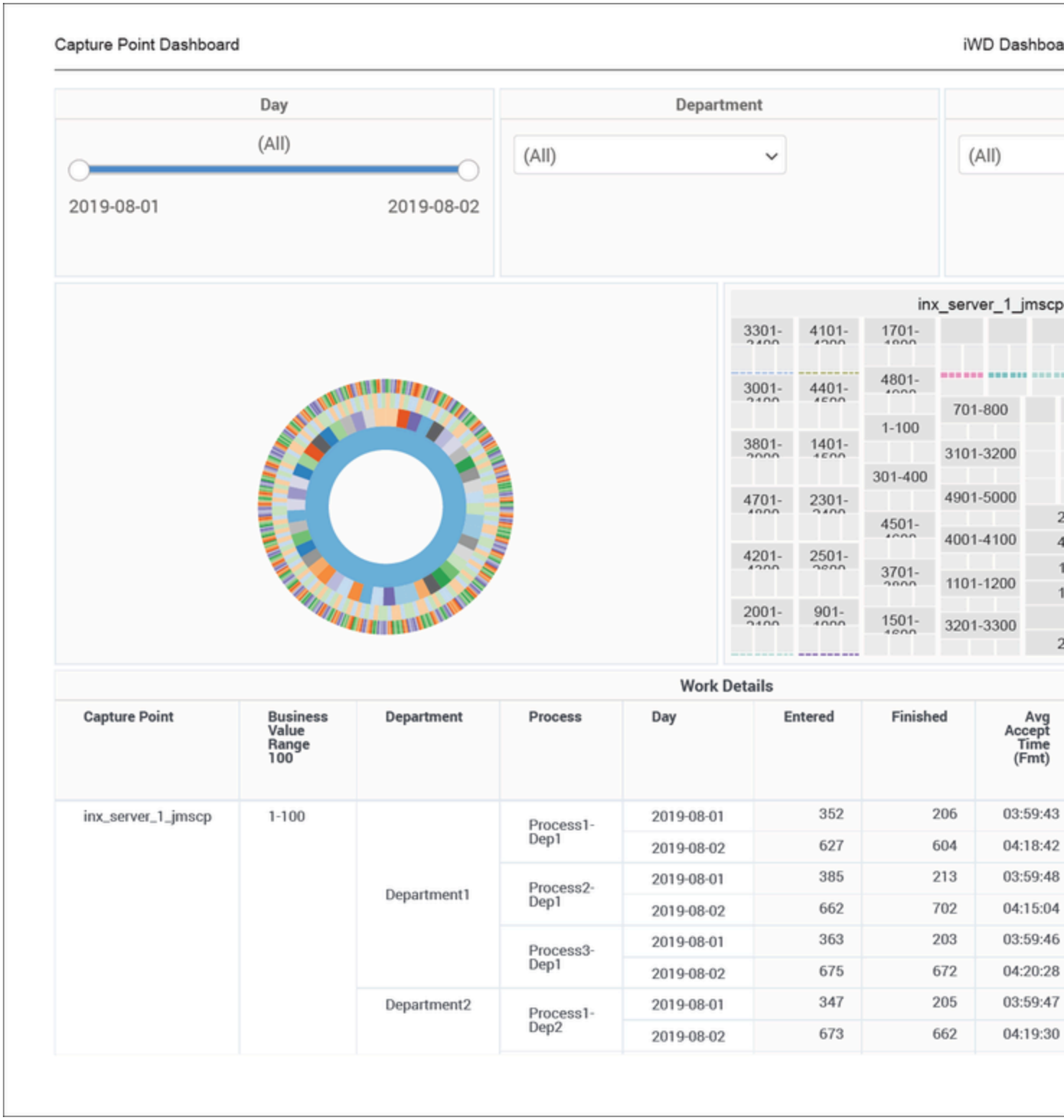
Capture Point Dashboard



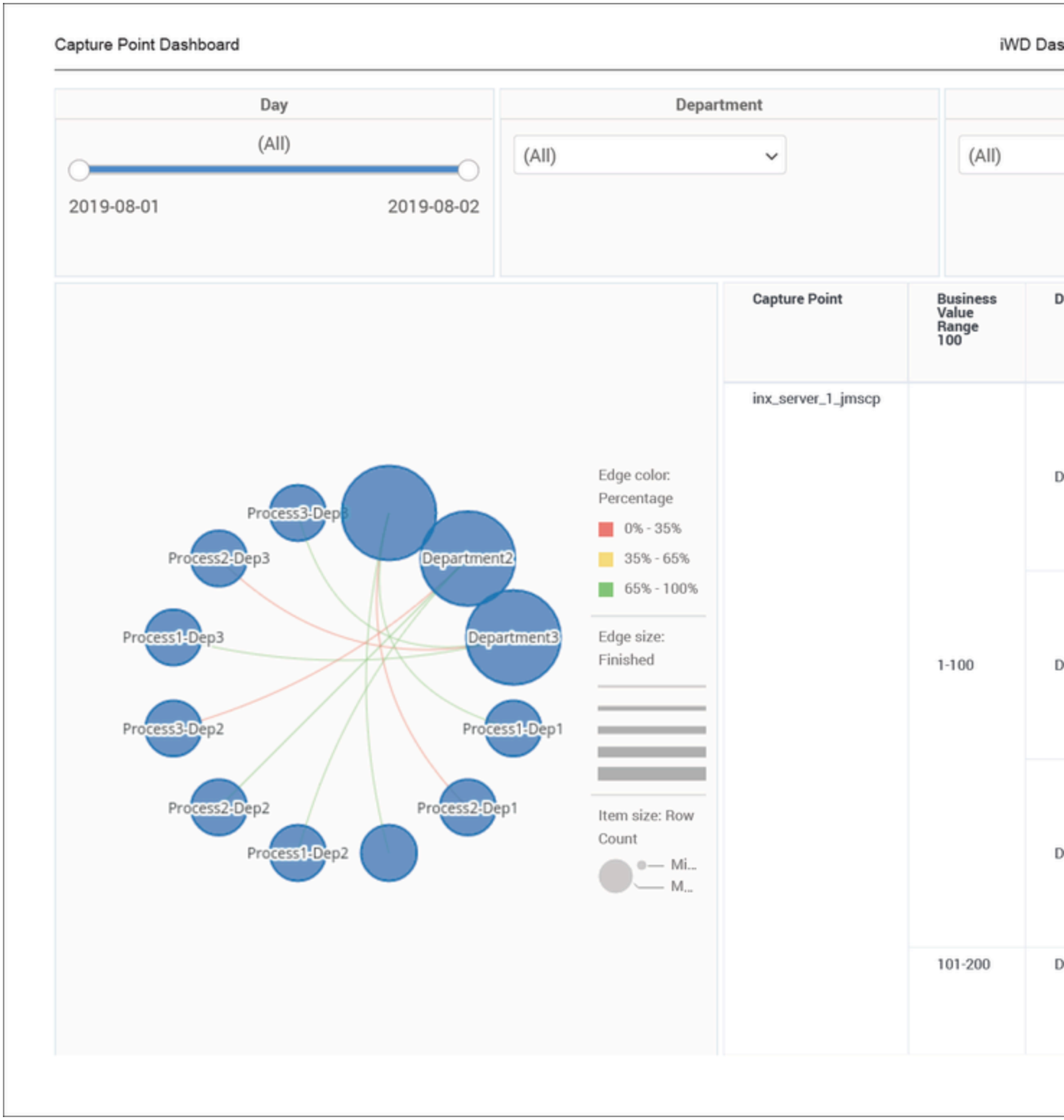
Capture Point	Business Value Range 100	Department	Process	Day	Entered	Finished	Avg Accept Time (Fmt)
inx_server_1_jmscp	1-100	Department1	Process1-Dep1	2019-08-01	352	206	03:59:43
				2019-08-02	627	604	04:18:42
			Process2-Dep1	2019-08-01	385	213	03:59:48
				2019-08-02	662	702	04:15:04
			Process3-Dep1	2019-08-01	363	203	03:59:46
				2019-08-02	675	672	04:20:28
		Department2	Process1-Dep2	2019-08-01	347	205	03:59:47
				2019-08-02	673	662	04:19:30

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:

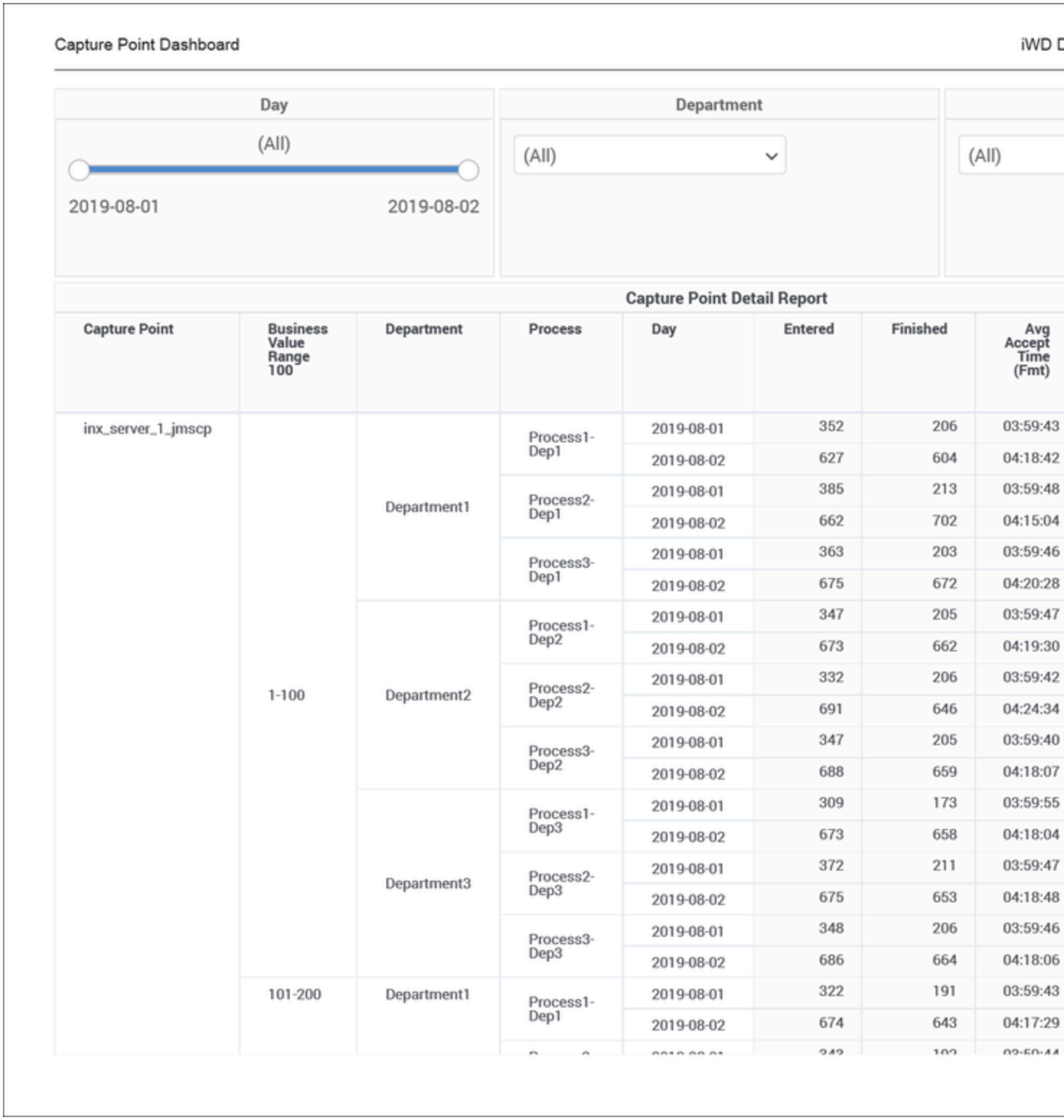
- **Work Arrival Business Value** tab — This tab provides insights into the value of work arriving at each capture point.
- **Capture Point Volumes** tab — This tab provides insights into the volume of work arriving at each capture point.
- **Capture Point Detail** tab — This tab provides a drill down 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 Report

Capture Point	Business Value Range 100	Department	Process	Day	Entered	Finished	Avg Accept Time (Fmt)
inx_server_1_jmscp	1-100	Department1	Process1-Dep1	2019-08-01	352	206	03:59:43
				2019-08-02	627	604	04:18:42
			Process2-Dep1	2019-08-01	385	213	03:59:48
				2019-08-02	662	702	04:15:04
			Process3-Dep1	2019-08-01	363	203	03:59:46
				2019-08-02	675	672	04:20:28
		Department2	Process1-Dep2	2019-08-01	347	205	03:59:47
				2019-08-02	673	662	04:19:30
			Process2-Dep2	2019-08-01	332	206	03:59:42
				2019-08-02	691	646	04:24:34
			Process3-Dep2	2019-08-01	347	205	03:59:40
				2019-08-02	688	659	04:18:07
		Department3	Process1-Dep3	2019-08-01	309	173	03:59:55
				2019-08-02	673	658	04:18:04
			Process2-Dep3	2019-08-01	372	211	03:59:47
				2019-08-02	675	653	04:18:48
			Process3-Dep3	2019-08-01	348	206	03:59:46
				2019-08-02	686	664	04:18:06
	101-200	Department1	Process1-Dep1	2019-08-01	322	191	03:59:43
				2019-08-02	674	643	04:17:29

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_RANGE

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:

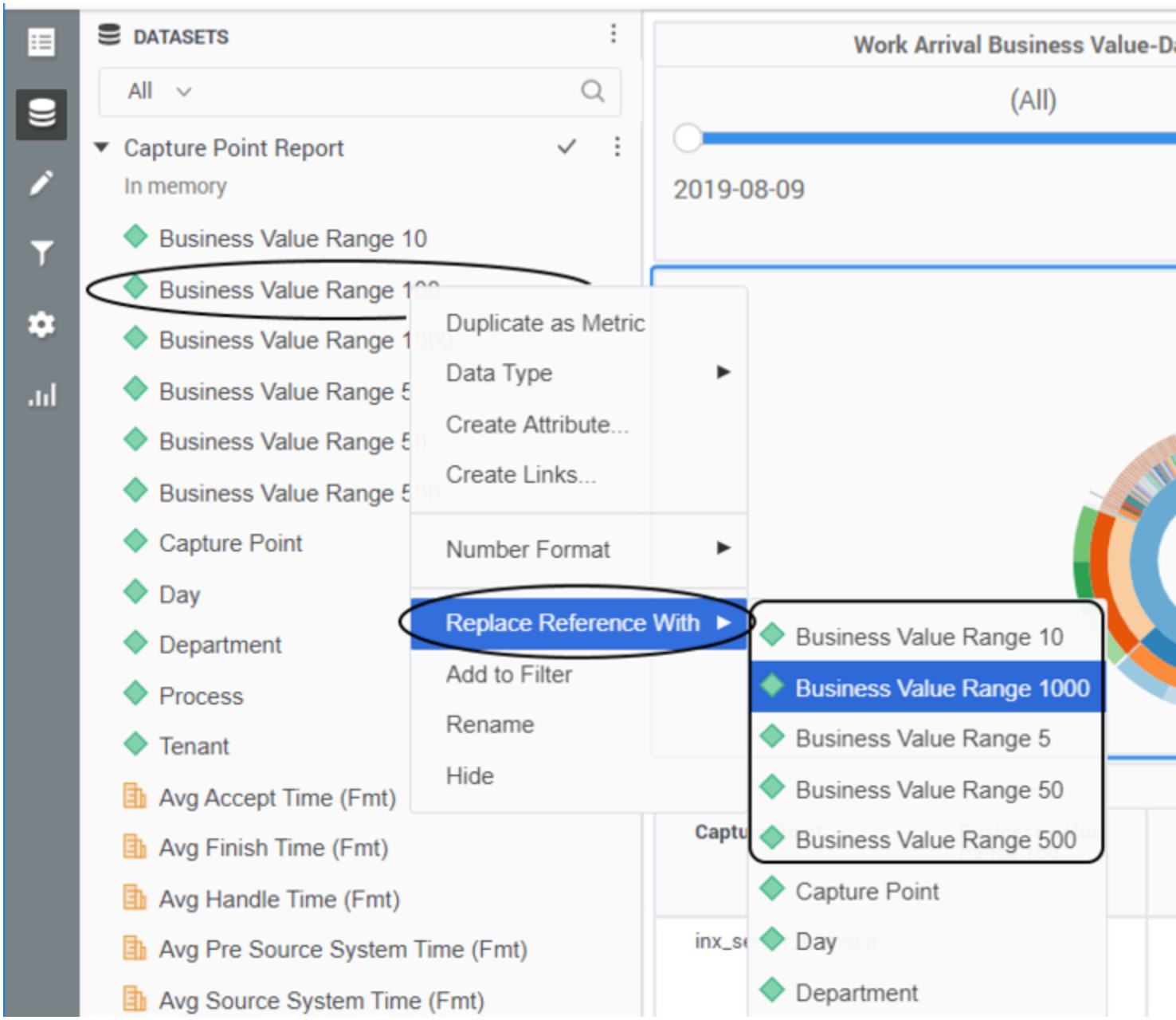
Metrics in the Capture Point Dashboard

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,H,15].NEW_TA
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].CMPL_T
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,D,H,15].CMP • Finished is: IWD_AGG_TASK_CAPT_[Y,Q,M,W,D,H,15].CMP
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,D,H,15].CMP • Finished is: IWD_AGG_TASK_CAPT_[Y,Q,M,W,D,H,15].CMP
Avg Finish Time (Fmt)	The average amount of time that	Calculated based on the value of

	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).



Changing the granularity of the dashboard data

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:
    1. 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**.
    3. 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.