Reporting Suite

Reporting

Standard Assets Guide

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Enghouse Interactive

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About this Guide

Audience

This document is intended for all end-users of Reporting, particularly the end-users of the Standard Reports, provided by Enghouse Interactive. Using these assets requires basic computer skills and knowledge, as well as an understanding of their contents and subject matter.

New in this release

No new information has been added to Standard Reports in this version.

Reference materials

Use this document with the following Guides:

- *Reporting Designer Guide*
- *Reporting Viewer Guide*

Guide conventions

This Guide uses the following text formats and notation conventions.

Text format

Bold text indicates a button, field, link, option name, or similar function requiring an action.

Italicized text indicates new terms, directory paths, or references to external documents.

`Text in this font` indicates code.

Notes and cautions

Icons used throughout this Guide identify additional details or special conditions.

> **Note**
> Provides additional information or describes special circumstances.

> **Caution**
> Warns of user actions that may cause system failure or irreversible conditions.

Stop

Describes actions that you should only perform under the supervision of Enghouse Interactive Customer Support.

Legal disclaimer

This document is governed by the terms of the software license agreement and applicable contract (including addendums) entered into with Enghouse.

Contact information

To submit comments or questions about the content in this Guide, open a case with Support.

Introduction to standard assets

Reporting is a powerful tool that allows you to effectively visualize and present your data with ease.

With Reporting, you can design reports to a great detail, choosing which data to include and how to present it to your users, with various graphical elements, sorting, filtering and other options.

Additionally, there are a number of Enghouse **Standard Reports** (standard assets) which are readily-available for you to use as soon as you log into your Reporting system if your system is integrated with the standard Enghouse BI Data Warehouse (DWH). These standard assets cover the most important data, KPIs and other statistics, and enable you to get a clear overview of your data straight away.

Standard Reports

Reporting standard reports are typically tabular data reports that show you either summary or detailed overviews of the relevant data. Usually they can be adjusted to suit your needs using a large variety of filters and settings, so that you can focus precisely on the data you need, while also having multiple options available.

Standard Reports can also be adapted for an individual user's or user group's needs through **Report Views**, a feature which allows you to customize the used columns, which means that you can further focus on the most important data, and hide what is not necessary for a specific purpose.

This document provides a detailed description of the individual standard assets, along with information how to effectively use them. You can read more about this in the upcoming sections.

Interacting with standard assets

Reporting standard assets can for the most part be interacted with as with any other report in Reporting. These general settings, features and options are described in more detail in the *Reporting Viewer Guide*, *Reporting Designer Guide*, and the *Reporting Power Viewer Guide*. **Make sure to first understand those documents before using this one.**

This document focuses of the specific characteristics of standard assets. All Reporting standard assets include a number of options and configurations that work in a similar common way. Therefore, the general ways you can interact with them and set them up to suit your needs are described in the following chapters. The individual assets are then described in more detail in the following sections.

> **Note**
> All standard assets (reports) have many common elements and options, and the general rules of use described in this section apply to all of them. However, which specific data you see and use in a report will vary and differ from what you see in this document based on your system and tenant configuration, as well as access rights. For further information on this, contact your Administrator.

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Standard Reports

In the upcoming section, you can read about the ways you can interact with Reporting standard reports.

> **Note**
> This section only includes some of the most relevant and specific ways of interacting with standard reports. Most information on this topic is described in the *ReportingViewer Guide*, so make sure to read that document first.

Report Views

Standard Reports are comprehensive and contain a large number of options, KPIs and other metrics that are typically not all needed at the same time. This is why Standard Reports are not intended to be used in this full form with users, and can instead be adapted to show only the metrics needed for a certain user profile.

This is where the Report Views feature is used as a powerful tool to facilitate the use of reports and to be able to focus only on the most relevant information at a time, as opposed to everything the report contains.

A report view (as opposed to the full report) is indicated with the view icon, as can be seen below:

In the Reports tab of Reporting, individual report views function the same way reports normally do, as described in the *Reporting Viewer Guide* and other user guides.

Multiple views can be made by a Report Designer or Power Viewer for the same standard report, depending on the purpose, audience, or other motivation – for example, with the Agent State standard report, a contact center manager and supervisor may be interested in different levels of detail in their reports. In such cases, the manager may have more use of a higher-level report, while a supervisor would benefit from more detailed reports. Examples of differences in report views are illustrated in the screenshots below.

Manager report view:

Agent State (Full)

	Logged In	Net Logged In	% Net Logged In	Break (Excl	% Break (Excl	Working Activity (Excl	% Working Activity (Excl	Idle (Excl	% Idle (Excl
Agent Group GAMMA	52340	2572	4.9%	49768	95.1%	2535	4.8%	138	0.3%
agent_gamma_001	43278	1103	2.5%	42175	97.5%	985	2.3%	118	0.3%
2020-12-31	1856	27	1.5%	1829	98.5%	27	1.5%	0	0.0%
2021-02-03	41	0	0.0%	41	100.0%	0	0.0%	0	0.0%
2021-03-08	16879	70	0.4%	16809	99.6%	70	0.4%	0	0.0%
2021-03-09	3319	0	0.0%	3319	100.0%	0	0.0%	0	0.0%
2021-08-31	361	92	25.5%	269	74.5%	92	25.5%	0	0.0%
2021-09-13	4998	0	0.0%	4998	100.0%	0	0.0%	0	0.0%
2021-10-13	1054	685	65.0%	369	35.0%	655	62.1%	30	2.8%
2021-10-14	234	229	97.9%	5	2.1%	141	60.3%	88	37.6%
2021-11-11	14536	0	0.0%	14536	100.0%	0	0.0%	0	0.0%

Supervisor report view:

Agent State (Full)

	Logged In	Net Logged In	% Net Logged In	Break (Excl	% Break (Excl	Working Activity (Excl	% Working Activity (Excl	Idle (Excl	% Idle (Excl	Online Activity (Excl	Hold (Excl	Wrapup (Excl	Offline Activity (Excl	Offering (Excl	Proposing (Excl
Total	**1867339**	**1444928**	**77.4%**	**422411**	**22.6%**	**1104093**	**59.1%**	**317217**	**17.0%**	**446557**	**8**	**314173**	**6**	**179105**	**857**
Company A	76701	29061	37.9%	47640	62.1%	24562	32.0%	4491	5.9%	4162	0	20072	0	221	0
CC_SITE1	76701	29061	37.9%	47640	62.1%	24562	32.0%	4491	5.9%	4162	0	20072	0	221	0
2021-01	22683	100	0.4%	22583	99.6%	57	0.3%	43	0.2%	0	0	0	0	0	0
2021-02	11011	164	1.5%	10847	98.5%	129	1.2%	35	0.3%	0	0	129	0	0	0
2021-03	3426	675	19.7%	2751	80.3%	670	19.6%	5	0.1%	0	0	670	0	0	0
2021-04	3054	2380	77.9%	674	22.1%	1985	65.0%	395	12.9%	0	0	1985	0	0	0
2021-06	3685	0	0.0%	3685	100.0%	0	0.0%	0	0.0%	0	0	0	0	0	0
2021-11	32842	25742	78.4%	7100	21.6%	21721	66.1%	4013	12.2%	4162	0	17288	0	221	0

> **Note**
>
> Aside from the content, report views may vary from the original report, as well as from other views based on the same report, in terms of style, too. Each view can use a different set of element styles, which can result in a distinct look and feel of the report view.

Standard Views

In addition to providing the option to manage and create new views for every standard report available in Reporting, a set of standard views is also provided to users by default. This means that, in order to start working with reports, users do not have to first create a view, but instead have ready-made views they can start working with.

Note that users with the appropriate access rights (such as Designers or Power Viewers) can duplicate views that are shared with them, including standard views, and can then further edit the copies as needed for their use case.

The list of standard views available for each standard report is provided as part of each report description.

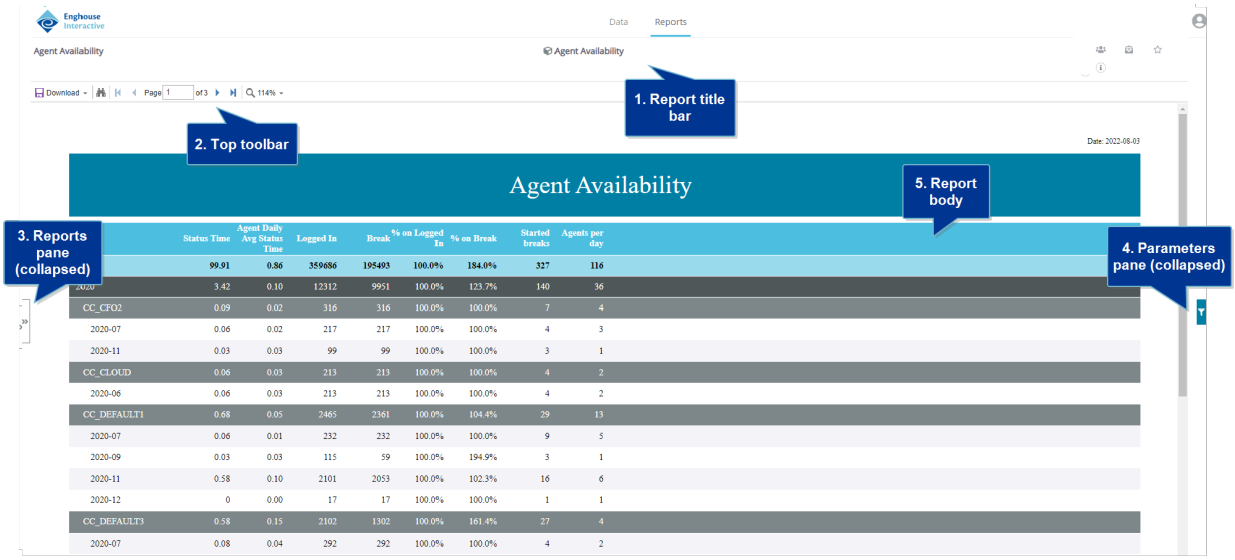
Reports Interface

The main elements of the Reports interface of all Standard Reports are the same as with any custom-made reports in Reporting.

> **Note**
>
> - In the context of interacting with the reports interface in Reporting, all actions described in reference to reports (and Standard Reports) also apply to report views.
> - Some options listed here may not be available, depending on tenant and system related settings. Refer to your System Administrator for more information.

In this document, you can find a brief overview of the features available for all Reporting Standard Reports. More detailed information on using reports is available in the *Viewer Guide*.

Below is an example of the interface Reporting Standard Reports have:



	Status Time	Agent Daily Avg Status Time	Logged In	Break	% on Logged In	% on Break	Started breaks	Agents per day
	99.91	0.86	359686	195493	100.0%	184.0%	327	116
2020	3.42	0.10	12312	9951	100.0%	123.7%	140	36
CC_CFO2	0.09	0.02	316	316	100.0%	100.0%	7	4
2020-07	0.06	0.02	217	217	100.0%	100.0%	4	3
2020-11	0.03	0.03	99	99	100.0%	100.0%	3	1
CC_CLOUD	0.06	0.03	213	213	100.0%	100.0%	4	2
2020-06	0.06	0.03	213	213	100.0%	100.0%	4	2
CC_DEFAULT1	0.68	0.05	2465	2361	100.0%	104.4%	29	13
2020-07	0.06	0.01	232	232	100.0%	100.0%	9	5
2020-09	0.03	0.03	115	59	100.0%	194.9%	3	1
2020-11	0.58	0.10	2101	2053	100.0%	102.3%	16	6
2020-12	0	0.00	17	17	100.0%	100.0%	1	1
CC_DEFAULT3	0.58	0.15	2102	1302	100.0%	161.4%	27	4
2020-07	0.08	0.04	292	292	100.0%	100.0%	4	2

The interface consists of the following sections:

1. **Report title bar**: This element contains the title of the report (top left), the title of its data source (center), as well as action buttons (top right). For Viewers, this contains the following features:

   - **Share** : If you have the appropriate access level, this opens a pop-up window where you can enter users to share the report with.
   - **Subscribe** : Opens a pop-up window where you can set up your report subscription schedule. Once you create a schedule, you receive a report via email with the preferences you choose at the chosen time(s).
   - **Favorite** : Adds your report to favorites. It can then be more easily accessed from the Reports pane or list/tiles. Favorite reports are marked with a blue star.
   - **Report Details** : Opens a pop-up window with report details, such as its description (if provided). Here you can also refresh your report's data or set up a refresh rate.

2. **Top toolbar**: In the top toolbar, you can do the actions described below. These actions are also described in the *Reporting Viewer Guide*.

   - **Download**: From the drop the drop-down list, choose the format you want to download your report in.
   - **Search**: Search for a string in the report.
   - **Pagination**: Navigate through the report pages.
   - **Zoom**: Adjust the level of zoom of the report to suit your screen size.

3. **Reports pane**: In the image, this section is hidden, but you can open it by clicking the two arrows in the left central edge of the window. In this pane, you can find a list of all reports available to you, as well as

the folders they are contained in, and the reports you marked as your favorites.

4. **Parameters pane**: This pane contains the filters and parameters needed to generate your report. Using this pane is described further in *Parameters pane below*. Like the Reports pane on the left side of the screen, this pane can also be hidden so more space on your screen is available for the report itself.
5. **Report**: The central part of the window is taken up by the report itself. It can consist of one or multiple pages, and can include visualizations (charts, graphs etc.) and tabular data. Which data is represented and what kind of visualizations are (or are not) used depends on the kind of Standard Reports you use, and are defined for each report individually. Further information about how you can interact with a report itself is provided in *Report on page 13*.

> **Note**
>
> The reports are made to be pixel-perfect and are intended to be used with larger screens, so there is no automatic scaling for smaller screens (such as laptop screens). You can use the zoom settings in the top menu to adjust the size of the report for your screen or, in some cases, you can use your browser's zoom settings.

Parameters pane

This pane contains the most important filters and settings of your standard reports, divided into the **Filters** and **Settings** tabs, located on top of this pane. This is where you choose which data you want to use for the report and how you want to set it up. Note that further details and examples are available in the *Viewer Guide*.

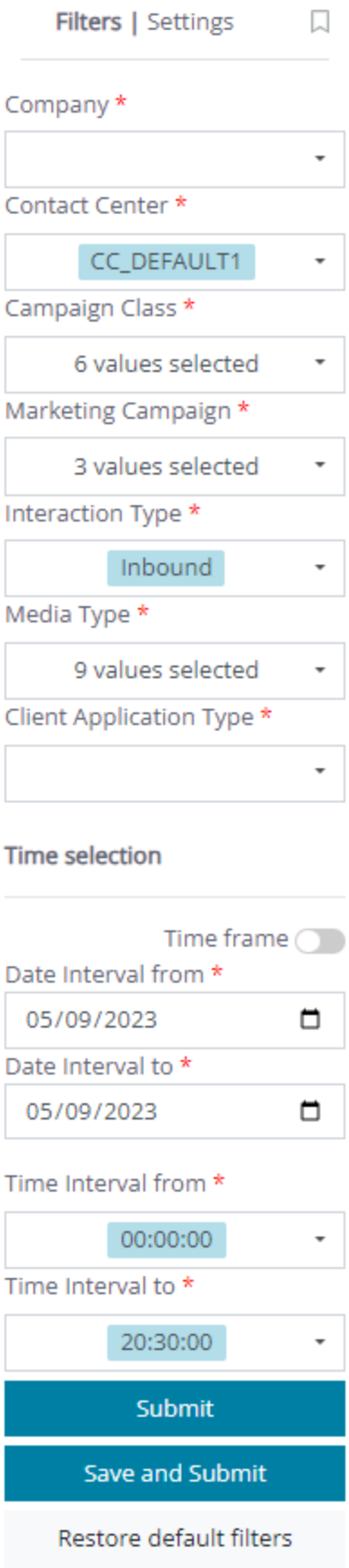
Once a Designer prepares the most important background information and connections to the data, Viewers can use filters and settings to adjust the generated report to their needs.

Individual filters and settings can be mandatory (*) or optional. If a parameter is mandatory, the report cannot be generated without the report user specifying the values they want to use. Filters and settings are discussed in the upcoming sections of the document.

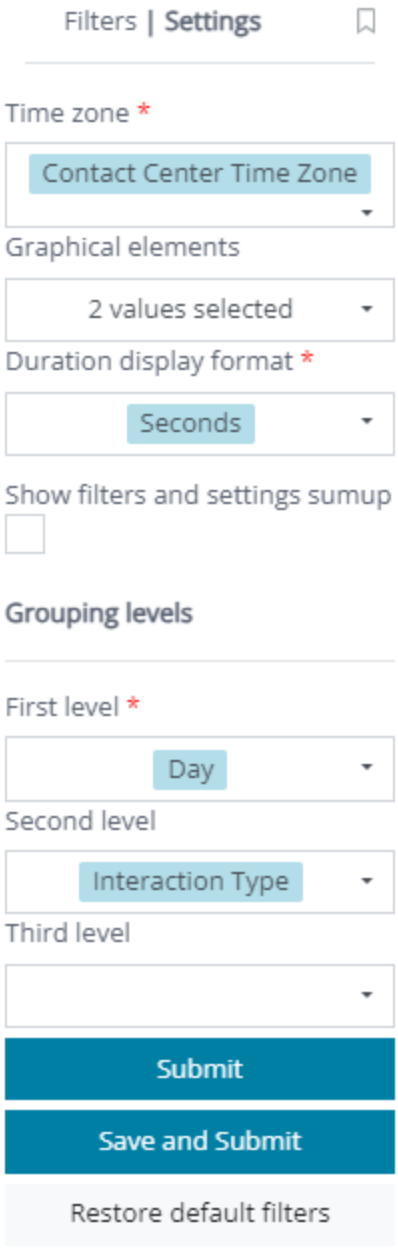
Along with adjusting the parameters, you can also bookmark your selections, or use existing bookmarks. You can read more about this in the *Reporting Viewer Guide*, as well. By clicking **Save and Submit** at the bottom of the pane, you can also save the used settings as the default for you, which will be available for you when you open the report the next time. When you do this, the option to **Auto Submit** the report appears. Select the checkbox to automatically generate the report with the saved filters and settings every time you open it. Clicking **Restore default filters** removes any such saved filters and settings.

Below is an example of what the Parameters pane may look like in a standard report.

Filters:



Settings



Filters

Filters define which data from your database is going to be used in the report and displayed in its rows and columns. Filters are therefore used to narrow down the data you want to see and analyze in your report's rows. The general use of filters is described in more detail in the *ReportingViewer Guide*.

Filter examples include date and time filters (intervals or time frames), string, numerical, boolean, and other filters. Not all standard reports have all kinds or always the same filters available.

Filters can be mandatory, marked with [*], or non-mandatory. If a filter is mandatory, you must define the values you want to use for that filter. If a filter is non-mandatory, you can leave it unset. In that case, all the data (including null data) that could be included with this filter is used.

Settings

With settings, you can define how the data selected through filters will be shown in the rows of your report. While the columns of all Standard Reports are predefined and cannot be changed by Viewers, the rows and the data in them can be adjusted to show the specific fields and grouping that you need.

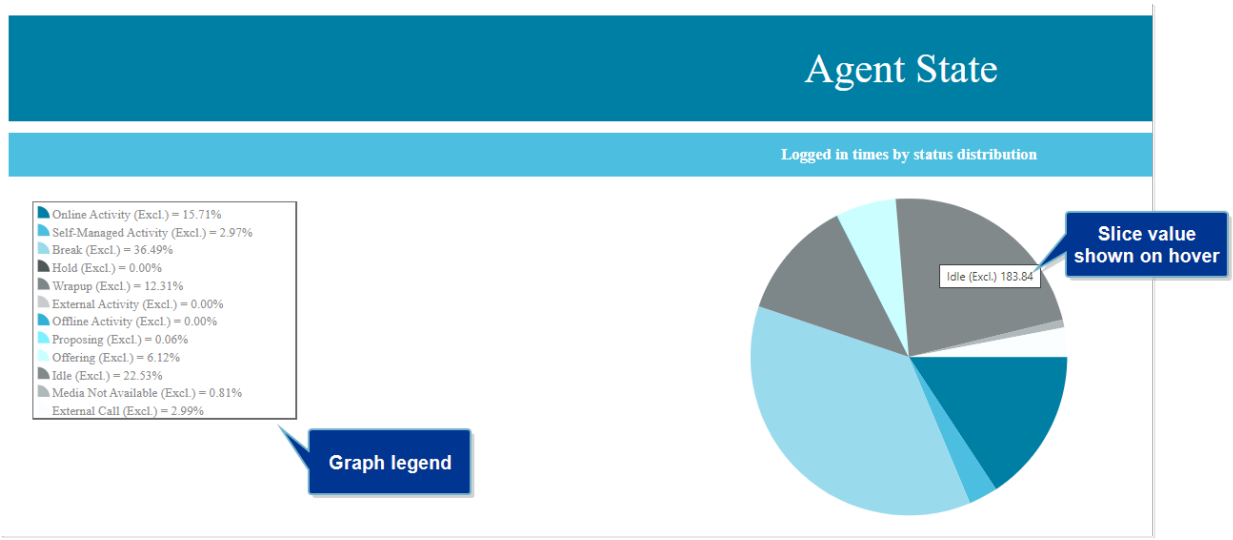
Report settings

In this pane, you can also choose and set up a number of settings. The availability of these settings varies based on the specific report you are using. The settings in a report can be one or more of the following:

- **Time zone**: This setting allows you to choose which time zone your report and all its components will be in. This setting is applied to the displayed data, as well as all the filters and settings. For example, choosing specific days or hours to filter your data by will apply the specified days or hours in the selected time zone.

> **Note**
> The specific time zones that will be available to you vary based on what is implemented in your database, i.e., the standard data warehouse. For more information, contact your Administrator.

- **Graphical elements**: If the report is designed to support this feature, you can click the **Graphical elements** drop-down list in the Settings tab to choose one or multiple visualizations for your data, such as charts or graphs. Which graphical elements you can use (if any) depends on the design of the Standard Reports, so these elements might not always be an option. Additionally, filters and settings applied to the report are also applied to the visualizations. Once selected and set up, the graphical elements are shown on top of the report and one under the other (if there are multiple). In most cases, you can hover over an element of a graphical element to see its value. The following screenshot showing a part of a standard report is an example of such visualizations:



- **Duration display format**: From this drop-down list, choose the format you want to display your duration data in. The options are as follows:
  - Seconds
  - Hours
  - HH:MM:SS (default value)

> **Note**
>
> - If the time duration is set to the HH:MM:SS format, and the duration amounts to more than 24 hours, the format will change to DDD.HH:MM:SS, where "DDD" reflects the number of days of the duration.
> - The time format changes currently do not apply to data in some graphical elements. Typically, if changes in the time format settings are not applied to a graphical element, the time format used in such elements will be seconds.

- **Date display format**: Choose from a number of available date display formats. The format you select here is reflected in all the date-related data in your report.
- **Timestamp display format**: From the drop-down list, choose the timestamp display format you want to apply to the timestamps used in your report. The format you select here is reflected in all timestamp data in your report.
- **Thresholds**: Depending on the data used in a report, you may have the option to set thresholds for various KPIs. For example, you could set up the Short Abandons Threshold; if a contact who is waiting in queue abandons their interaction within the duration of the defined threshold, the interaction is labeled as a short abandon and is included in the general report and data analysis accordingly.
- **Show filters and settings sumup**: If this checkbox is selected, in the footer section of the report, a list of all filters and settings used to generate this report will be shown. This may be useful if you need to send someone the details of your report - with this feature, you can quickly access a simple list of all the settings and filters.

- **Show empty rows**: This setting allows you to control whether or not you want to see report rows (based on your data grouping levels) that do not contain any data. Selecting this checkbox shows empty rows. If this checkbox is left cleared, rows that do not contain any data are not shown, which may facilitate report use.
- **Interaction Journey Report UUID**: In reports where this feature is made available, you need to enter the UUID of the detail report you want to jump to when you click an interaction. See more information about this feature in *Master-Detail report relationships on page 15*.

Data grouping levels

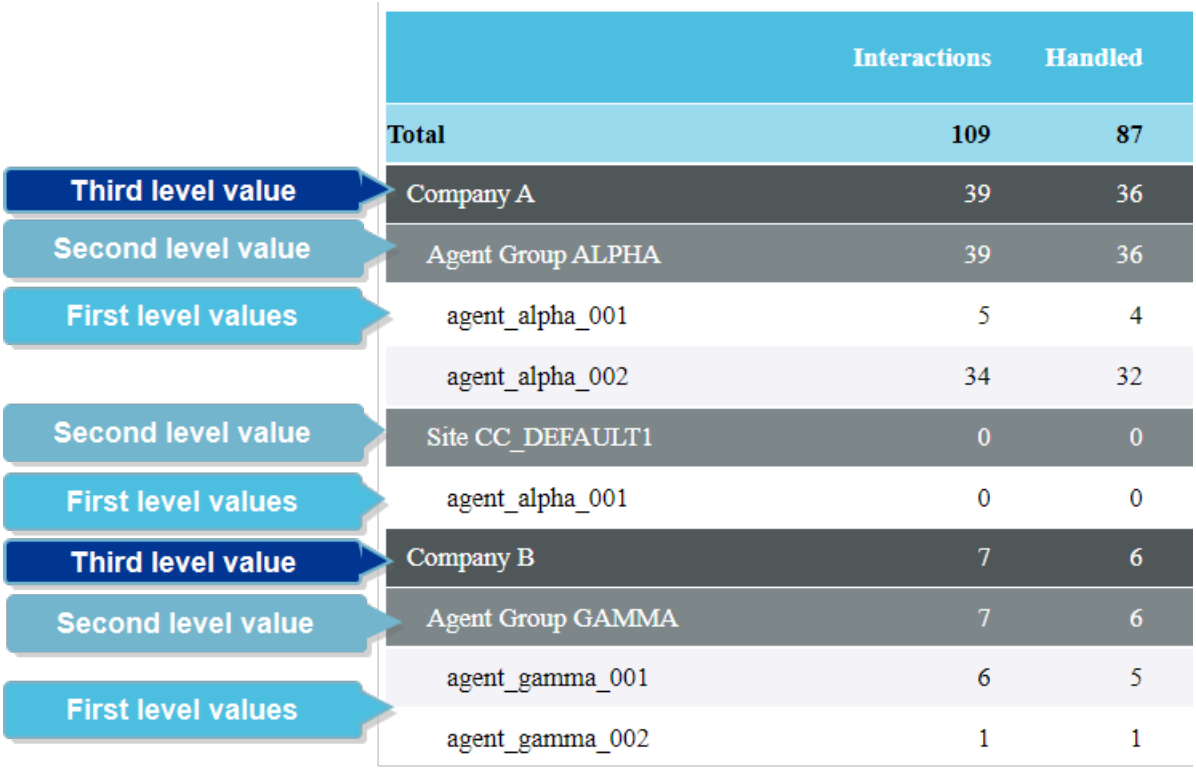
If designed in such a way, reports can be subdivided into a number of data grouping levels. The number of levels users can define in a report vary based on how the Standard Reports are designed. If available in the report, the first level is always mandatory; in case there are multiple levels in a report, typically all levels except the first one are optional.

Each data grouping level is used to display data related to the value you choose for that level. The data is nested, meaning that each individual value of a data grouping level contains all related values of lower grouping levels. Each grouping level row also shows a summary of all the values contained within it.

> **Note**
> By default, all data grouping level values shown in a report are ordered in alphabetical ascending order. You can then sort the shown values by (only) the first level, as described in *Data Sorting on page 14*.

In the image below, for example, the report has three levels: It shows data about individual Agents (first level), which are grouped by Agent groups (second level). Agent groups are, in turn, grouped by Company (third level). Below is a more detailed description of each level, in order of appearance in the report:

- The **third level** is set to show the Company field, and is visible in the report as the dark-grey rows. This is the highest level in this specific example. The first Company field value shown here is "Company A", followed by all available lower level data related to this value. This includes the second and first levels. After all the data related to this value of the third level is shown, the next third-level value is listed. In this example, that is "Company B", also in a dark-grey row, followed by lower level data related to that value, and so on.
- The **second level** in this example is set to Agent group, and is shown as the grey rows titled "Agent Group ALPHA", "Site CC_DEFAULT1" etc. Those are second-level values, which each have their own first-level values under them.
- The **first level**, (mandatory), is set to show the Agent (full user name) field. These values are shown in off-white. In this example,first-level values are individual agents, which are shown under each workgroup (second level) they work in, which are, in turn, shown under each company (third level).



	Interactions	Handled
Total	**109**	**87**
Company A	39	36
Agent Group ALPHA	39	36
agent_alpha_001	5	4
agent_alpha_002	34	32
Site CC_DEFAULT1	0	0
agent_alpha_001	0	0
Company B	7	6
Agent Group GAMMA	7	6
agent_gamma_001	6	5
agent_gamma_002	1	1

Report

The central part of the report window is taken up by the report itself. In the case of Standard Reports, the columns of the report are already predefined and are based on relevant data and KPIs. Which report values will be used depends on the kind of report and what is important in which context - in other words, the values that will be shown in a report depend on the *Report Views on page 4*.

> **Note**
> The specific content of all individual reports is described in greater detail in the individual reports' sections further in this document.

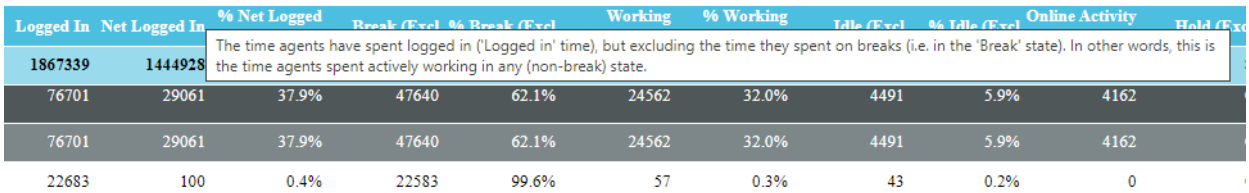
The following chapters cover the features you can find in all Reporting Standard Reports.

Tooltips

Each report title contains a tooltip that gives you a brief explanation of what that report contains to give you a better idea of what you can see in that report. To see the tooltip, hover over the title of the report after generating it.

> **Note**
> The report description is available before generating the report, as well, in the upper right corner of your window in the top menu (for more information, see **Report Details** in *Reports Interface on page 6*).

The report values, that is, the report column titles, also contain tooltips that help you understand what this value refers to. They are shown on hover over a value:



The same can be done with certain types of visualizations, such as pie charts. When hovering over one of the pie slices, you can see the label and value of that slice. This is shown in the example in *Report settings on page 10*.

Data Sorting

Data within a report can be sorted in ascending or descending order. To sort data by a report value, click the value (row title) you want to sort it by. Clicking once sorts the data in ascending order; clicking again sorts it in descending order.

Data is only sorted on the level of the first data grouping level in the report, which is also the only mandatory level of a report. This means that all levels higher than the first will not be sorted, rearranged or moved if sorting is active within the report. This is seen in the example below; while the third and second level values don't change in any way between the two sorting options, the first-level values (in off-white) are changed when sorting by the Logged in time column:

Ascending order:

	Logged in time (s)	Net logged time (s
DEFAULT	214450	130662
Site CC_CFO1	30591	7663
Carlo Fornasiero (cfornasiero_sup1)	8	0
Carlo Fornasiero (cfornasiero_op2)	614	518
Carlo Fornasiero (cfornasiero_op1)	29969	7145
Site CC_DEFAULT	180692	121589
Operator Default (Default_Oper1)	439	63
Agent 003 Default (agent_default_003)	131042	74601
Agent 002 Default (agent_default_002)	4200	1954
Agent 001 Default (agent_default_001)	45011	44971

Descending order:

	Logged in time (s)	Net logged in time (s)
DEFAULT	214450	130662
Site CC_CFO1	30591	7663
Carlo Fornasiero (cfornasiero_op1)	29969	7145
Carlo Fornasiero (cfornasiero_op2)	614	518
Carlo Fornasiero (cfornasiero_sup1)	8	0
Site CC_DEFAULT	180692	121589
Agent 001 Default (agent_default_001)	45011	44971
Agent 002 Default (agent_default_002)	4200	1954
Agent 003 Default (agent_default_003)	131042	74601
Operator Default (Default_Oper1)	439	63

Master-Detail report relationships

When using some of the available standard reports (for example, Interaction Detail), you may be able to click on an interaction row to open a new detail report that contains additional information specifically for that interaction.

The specific content of such detail reports depends on the type, i.e., design of the report. You can see an example of such a report and its content in *Interaction Journey on page 138*.

In reports where this option is made available, in the Settings tab, you can specify the **Detail Report UUID**. There you can enter the UUID of the detail report you want to be redirected to when you click an interaction in the master report.

> **Note**
> In report views, this setting is usually hidden, and can also be predefined by Designers or Power Viewers.

Typically, detail reports are set to have their left and right panes (Reports and Parameters panes), as well as top menu, hidden by default.

Agent State

This standard report helps you understand your agents' activities, particularly the time they spent in each agent state.

The asset description is divided into chapters as shown below. In these chapters, you can find out what the goal of the asset is, which filters you can use for your data, how to set up your asset, which graphical elements you can use in it (if they are available), and, finally, what each metric refers to.

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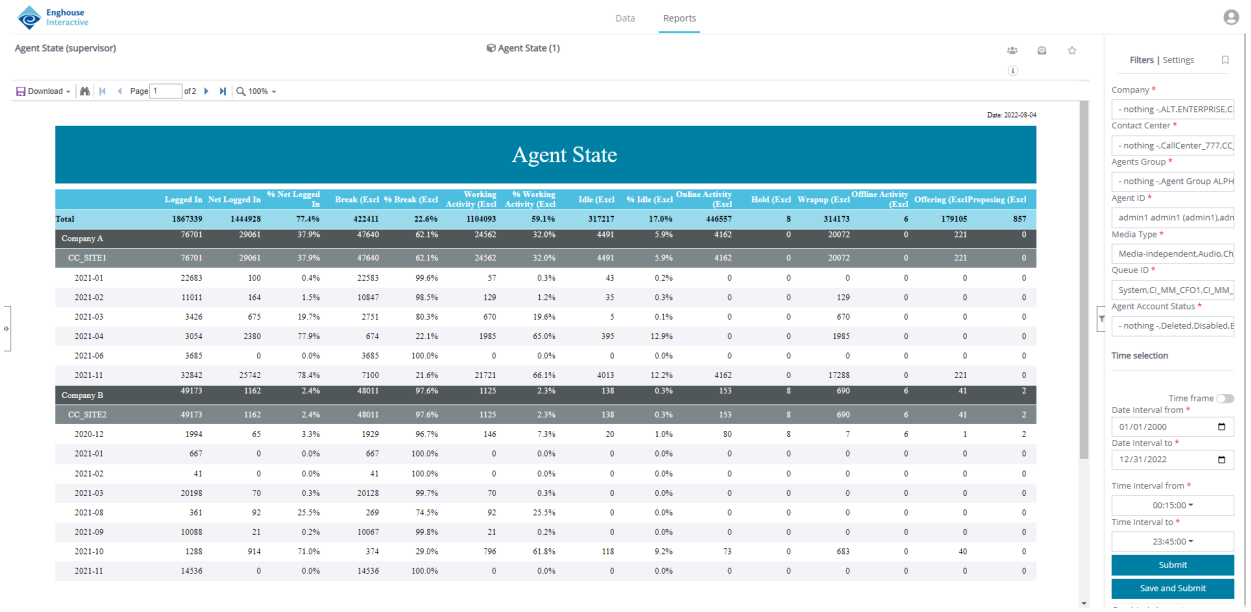


Objectives

The Agent State Standard Report was created to help contact center supervisors access data about agents' performance in a given time, and to optimize the interaction handling by reviewing the time the agents spend in each status.

Gaining insight into this data should help minimize the cost per interaction and optimize the agents' work time by analyzing the existing data and finding the areas that may need improvement.

The ability to access data on the work of the agents, in which situations they spend their time and how they compare to others in the same or other workgroups is fundamental in order to check the various aspects of the agents' performance: From identifying training needs to optimizing the business process that supports the treatment of each interaction.

This report should be usable for multiple environments with little or no need for adaptation.

Report parameters

> **Note**
> While Reporting Standard Reports can be implemented to many environments with little to no change, it is important to note that some settings, options and results may still vary based on your individual implementation, data and system settings. In case you have any questions, refer to your Administrator or Reporting contact.

Filters

You can use multiple filters for this report. From a list of available filters, select one or more values for which you want to see the data. For non-datetime filters, you can select all available values, search for specific values, or clear all selected values from the dropdown list. Mandatory filters are marked with *, while non-mandatory filters can be left empty, i.e., unset, in which case this filter will not influence the report.

Depending on the filter, the following options may be available in the dropdown filters along with the data from your data source:

- **- Not defined -**: Choosing this option includes the fields in your data source that have no (null) data.
- **- Not assigned -**: Selecting this option includes cases where an agent was not assigned to an interaction, such as for self-service interactions.

The following filters can be used for this report:

- **Company**: Choose the companies you want to see data for from the list of available companies.
- **Contact Center**: Select the contact centers whose data you want to analyze in the report.
- **Agents Group**: From the dropdown list, select the agents groups whose data you want to use for the report.
- **Agent ID**: From a list of available agents, select one or more agents for which you want to see the report data. The list shows the agents available for this report in your system.
- **Media Type**: From the dropdown list, select the specific media type(s) you want to filter your interactions by. The specific available media types will very based on your systems, but examples include chat, email, phone etc.

  > **Note**
  > Using the **Media-Independent** option from the Media type filter dropdown menu means that data will be filtered and shown regardless of the media type.

- **Queue ID**: From a list of available queue IDs, select one or more for which you want to see the report data. The list shows the queue IDs available for this report in your system.
- **Agent Account Status**: From the dropdown list, select the status of the account agents are using to work in your system. The status can be one of the following:
  - **Enabled**: Agent can use the system as intended.
  - **Disabled**: Agent can no longer directly use the system, but the account is not deleted; all preexisting user-related data is preserved. The account can be enabled again to allow normal access.
  - **Deleted**: User is deleted from the system. All preexisting user-related data is preserved, but the account can no longer be enabled again.

Time selection

- **Date interval**: Choose the dates (interval) or relative time frame for the data. Switch between the Time frame and Interval mode by clicking the toggle just above the Date filter.
  - **from - to**: Enter the **from** and **to** dates for your filter manually or select them from the dropdown menu.
  - **Time frame**: Toggle the **Time frame** switch on to use the time frame mode. From the dropdown lists, choose the time unit (Days, Weeks, Months, Quarters or Years) and the relative time frame for your report.
- **Time interval (from and to)**: Choose the time interval in which the interactions you want to see started. From a list of full hours (24-hour format), choose the starting and ending hour to show your data in.

Settings

Time zone

With this setting, you can choose which time zone to view your data, filters and settings in. See *Report settings on page 10* for more information.

Graphical Elements

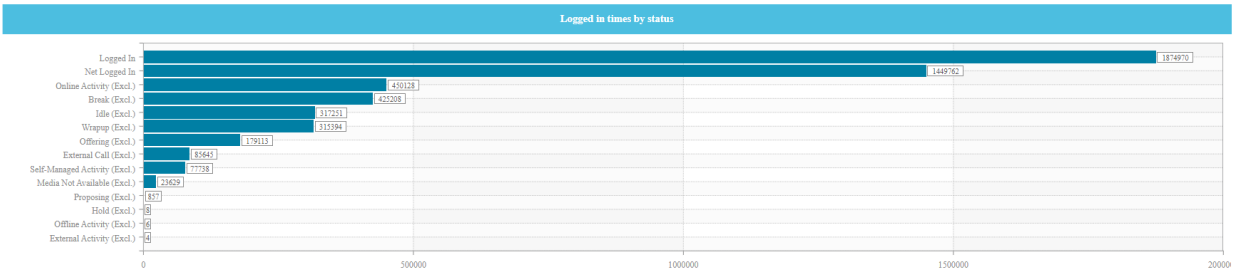
In this report, you can utilize two types of graphical elements to visualize your data. You can choose to use none of the graphical elements, (either) one of them, or both of them at the same time. If you choose to use any of the graphical elements, they are placed at the top of the report and one under the other (if multiple are selected), as can be seen in the example in *Objectives on page 16*.

The following two graphical elements can be used with this report:

- **Pie chart**: The pie chart in this standard report is titled **Logged in time by status distribution**, and it shows the percentage distribution of all individual agent statuses compared to the total logged in time for all agents. For example, if agents were each logged in for a total of 8 hours, but spent 4 hours in the "Online Processing" status, then the "Online Processing" state would have a 50% slice in the pie chart. In other words, it shows the percentage of the time the agents spent in any of the available agent states (such as whether they were on a break, idle, in a self-managed activity etc.), compared to the total time they were logged in. The percentages are reflected in the pie slices, and the legend to the left of the chart shows

which color represents which agent status. Hovering over a pie slice shows the amount of time spent in that agent state in seconds.

- **Bar chart**: Similarly to the pie chart, the bar chart titled **Logged in time by status** shows a breakdown of the total duration (in seconds) that agents spent in a specific status. The Y-Axis shows the various agent statuses; the X-Axis shows the number of seconds.Each bar also has a label at its right end showing the specific number of seconds the agents have spent in that state. As opposed to the pie chart, which shows relative percentages, the bar chart shows absolute numerical values, i.e. the duration of time, in seconds.



Duration display format

The **Duration display format** setting lets you define how you want to display the durations shown in your report. For more information, see this section.

Date display format

Using this setting, you can modify the way your date data is displayed in the report. See *Report settings on page 10* for more information.

Show filters and settings sumup

Selecting this checkbox shows you a sumup of all report details. See more in *Report settings on page 10*.

Data grouping levels

Up to three data grouping levels can be set up for the parameters in this report. Only the first (lowest) level is mandatory; the other grouping levels are optional and can be left unset. If unset, these data grouping levels will not be shown in the report.

The following parameters can be selected from dropdown lists and used as the data grouping levels in this report:

- **Agent ID**: Agents' User ID without their full name.
- **Agent info**: Additional information on the agent, such as the agents' full (first and last) name, with their UserID in brackets.
- **Agents Group**: Name of the agents group.
- **Company**: Name of the company.
- **Contact Center**: Name of the contact center.
- **Media type**: The channel used by the agent to handle the interaction; examples include telephone, emails, chat etc.
- **Queue ID**: The ID of the queue without a description.
- **Queue Description**: The (brief) description of the queue, if provided in your implementation.
- **User Account Status**: The status of the account an agent is using to work in your system.
- **Year/Month/Day/Hour**: Time unit to be used for a report grouping level.

> **Note**
> The totals in each row of this are not calculated through the sums of the details shown in the report, but instead take advantage of the different rows available in your DWH. This means that depending on your settings, the totals in the rows of your report may be higher or lower than the sum of the individual detail values below them. For more information on how a specific total is calculated, contact your System Administrator.

Standard views

Standard views are report views available to users by default. See more about them in *Standard Views on page 6*.

This report includes the following standard views:

- **Agent State**: This view provides users with information on the time agents have spent logged in, as well as the percentages of the logged in time that agents have spent in each agent state.

Report values definition

Report values are part of the report itself and are shown once the report is generated. They are predefined and cannot be modified through the report settings and filters. In practical terms, report values are the columns shown in your report. Each metric shown in your report's columns is described below in more detail; explanations are also available on hover over the individual metrics in the report.

The list below shows **all the available metrics and KPIs** that could be used as columns in your report, but which will rarely all be used at the same time and in the same report. The actual metrics used in a report may vary based on your implementation and the use of **report views**, as created by the Report Designer. See *Report Views on page 4* for more information.

> **Caution**
>
> Some UI elements, such as tooltips and labels, can be customized to fit your team's or company's needs. However, if any customizations are applied, especially for the values presented in the table below, this document does **not** reflect them. The person/entity that created the customized content has the sole responsibility for informing all the users of their system about the customizations. Contact your system administrator for more information on your customizations.

The following report values can be used in the Agent State standard report:

Label	Tooltip
% Break (Excl.)	The percentage of time that agents spent in the 'Break' state, compared to the total time they were logged in (Logged in time), including breaks.
% External Activity (Excl.)	The percentage of time agents spent in the 'External Activity' state, compared to the total time they were logged in (Logged in time), including breaks.
% External Call (Excl.)	The percentage of time agents have spent in the 'External Call' state, compared to the total time they were logged in (Logged in time), including breaks.
% Hold (Excl.)	The percentage of time that agents spent in the 'On hold' state, compared to the total time they were logged in (Logged in time), including breaks.
% Hold (Excl.) of Online Activity (Excl.)	The percentage of time agents spent in the 'On Hold' state, compared to the total time they spent in the 'Online activity' state.
% Idle (Excl.)	The percentage of time agents have spent in the 'Idle' state, compared to the total time they were logged in (Logged in time), including breaks.
% Media Not Available (Excl.)	The percentage of time agents spent in the 'Media Not Available' state, compared to the total time they were logged in (Logged in time), including breaks.
% Net Logged In	The percentage of the 'Net Logged In' time of all agents, excluding breaks, compared to the total time they were logged in (Logged in time), including breaks.
% Offering (Excl.)	The percentage of time agents spent in the 'Offering' state, compared to the total time they were logged in (Logged in time), including breaks.
% Offline Activity (Excl.)	The percentage of time agents spent in the 'Offline Activity' state, compared to the total time they were logged in (Logged in time), including breaks.
% Online	The percentage of time agents spent in the 'Online activity' state, compared to the total time

Label	Tooltip
Activity (Excl.)	they were logged in (Logged in time), including breaks.
% Proposing (Excl.)	The percentage of time agents spent in the 'Proposing' state, compared to the total time they were logged in (Logged in time), including breaks.
% Self-Managed Activity (Excl.)	The percentage of time agents spent in the 'Self-managed activity' state, compared to the total time they were logged in (Logged in time), including breaks.
% Working Activity (Excl.)	The percentage of time agents have spent in the (exclusive) states that are included in the 'Working Activity' calculation, compared to the total time they were logged in (Logged in time), including breaks.
% Wrapup (Excl.)	The percentage of time that agents spent in the 'Wrapup' state, compared to the total time they were logged in (Logged in time), including breaks.
Agent Daily Avg Break (Excl.)	The daily average time an agent spent in the 'Break' state. This is calculated by dividing the total time agents have spent in the 'Break' state by the total number of distinctive/unique agents per each day in the selected datetime range.
Agent Daily Avg External Activity (Excl.)	The daily average time an agent spent in the 'External Activity' state. This is calculated by dividing the total time agents have spent in the 'External Activity' state by the total number of distinctive/unique agents per each day in the selected datetime range.
Agent Daily Avg External Call (Excl.)	The daily average time an agent spent in the 'External Call' state. This is calculated by dividing the total time agents have spent in the 'External Call' state by the total number of distinctive/unique agents per each day in the selected datetime range.
Agent Daily Avg Hold (Excl.)	The daily average time an agent kept an interaction on hold. This is calculated by dividing the total time agents have spent in the 'On hold' state by the total number of unique/distinct agents per each day in the selected datetime range. For example, if 5 agents together spent 3 hours in this state on day 1, and another 7 agents together spent 4 hours in this state on day 2, the calculation is (3+4)/(5+7) = 0.58 hours per agent per day.
Agent Daily Avg Idle (Excl.)	The daily average time an agent spent in the 'Idle' state. This is calculated by dividing the total time agents have spent in the 'Idle' state by the total number of distinctive/unique agents per each day in the selected datetime range.
Agent Daily Avg Logged In	The daily average time an agent spends logged into the system, that is, in the 'Logged In' state. This is calculated by dividing the total 'Logged In' time of the agents by the total number of distinctive/unique agents per each day in the selected datetime range.
Agent Daily Avg Media Not Avail-	The daily average time an agent spent in the 'Media Not Available' state. This is calculated by dividing the total time agents have spent in the 'Media Not Available' state by the total number of distinctive/unique agents per each day in the selected datetime range.

Label	Tooltip
able (Excl.)	
Agent Daily Avg Net Logged In	The daily average 'Net Logged In' time of an agent. This is the average daily Logged In time excluding the Break time for an agent. This is calculated by dividing the total 'Net Logged In' time of the whole system by the total number of distinctive/unique agents per each day in the selected datetime range.
Agent Daily Avg Offering (Excl.)	The daily average time an agent spent in the 'Offering' state. This is calculated by dividing the total time agents have spent in the 'Offering' state by the total number of distinctive/unique agents per each day in the selected datetime range.
Agent Daily Avg Offline Activity (Excl.)	The daily average time an agent spent in the 'Offline Activity' state. This is calculated by dividing the total time agents have spent in the 'Offline Activity' state by the total number of distinctive/unique agents per each day in the selected datetime range.
Agent Daily Avg Online Activity (Excl.)	The daily average time an agent spent in the 'Online activity (excl.)' state, working on an interaction. This is calculated by dividing the total time agents have spent in the 'Online activity (excl.)' state by the total number of distinctive/unique agents per each day in the selected datetime range. For example, if 3 agents together spent 15 hours in this state on day 1, and 2 agents together spent 7 hours in this state on day 2, the calculation is (18+7)/(3+2) = 5 hours per agent per day.
Agent Daily Avg Proposing (Excl.)	The daily average time an agent spent in the 'Proposing' state. This is calculated by dividing the total time agents have spent in the 'Proposing' state by the total number of distinctive/unique agents per each day in the selected datetime range.
Agent Daily Avg Self-Managed Activity (Excl.)	The daily average time an agent spent in the 'Self-managed activity' state. This is calculated by dividing the total time agents have spent in the 'Self-Managed Activity' state by the total number of distinctive/unique agents per each day in the selected datetime range.
Agent Daily Avg Working Activity (Excl.)	The daily average time an agent spent in the (exclusive) states that are included in the 'Working Activity' calculation. This is calculated by dividing the sum of the times agents have spent in all of the included states by the total number of distinctive/unique agents per each day in the selected datetime range.
Agent Daily Avg Wrapup (Excl.)	The daily average time an agent spends in the 'Wrapup' state.This is calculated by dividing the total time agents have spent in the 'Wrapup' state by the total number of unique/distinct agents per each day in the selected datetime range. For example, if 4 agents together spent 2 hours in this state on day 1, and another 8 agents together spent 6 hours in this state on day 2, the calculation is (2+6)/(4+8) = 0.67 hours per agent per day.
Break (Excl.)	The total amount of time all agents have spent on breaks (that is, in the 'Break' state), added up. During this time, agents were unavailable to handle their interactions or do other work. This state is exclusive (excl.); if multiple states are active at the same time, the duration is allotted to a state based on your system's settings.

Label	Tooltip
External Activity (Excl.)	The total time agents spent in the 'External activity' state. This is a state where, having finished communication with the contact, the agent works on relevant data entry outside the contact center's application. The 'External activity' state comes after the 'Online/Offline activity' states.
External Call (Excl.)	The total time agents have spent in the 'External call' state. In this state, agents are working on a manual outbound call or a direct inbound call (to that agent's specific extension). This means that the interaction (call) was not assigned to the agent via the queueing system. This state is exclusive (excl.); based on your implementation's state priority ranking, the duration is only allotted to the highest-ranked state if multiple states are active at the same time.
Hold (Excl.)	The total time all agents have had an interaction put on hold. This state is exclusive (excl.); if multiple states are active at the same time, the duration is allotted to a state based on your system's settings.
Idle (Excl.)	The total time agents have spent in the 'Idle' state. This state is activated when agents are waiting for an interaction or a contact to handle.
Logged In	The total time agents have spent logged in to the system. This includes all agent states in the system (including breaks) and their durations.
Media Not Available (Excl.)	The total time agents have spent in the 'Media not available' state. This state is activated if an agent is unable to work due to technical issues, such as no internet connection or other reasons. During this state, the agent can use the application and perform other tasks, but cannot do the actions that are part of the 'Online/Offline activity' state. This state is exclusive (excl.); based on your implementation's state priority ranking, the duration is only allotted to the highest-ranked state if multiple states are active at the same time.
Net Logged In	The time agents have spent logged in ('Logged in' time), but excluding the time they spent on breaks (i.e., in the 'Break' state). In other words, this is the time agents spent actively working in any (non-break) state.
Offering (Excl.)	The total time agents spent in the 'Offering' state. In this state, the interaction (inbound/outbound call, chat, email...) has been initiated, but the participants are not connected or actively communicating yet. Once they are connected, the state changes from 'Offering' to 'Online/Offline activity' (depending on interaction type). For example, for incoming calls, this state's duration is equal to the ring time of the agent's phone (before they pick up). For outgoing calls, it is the time until the call gets connected. For chat, it is the time between the chat offer and the agent's first response; etc. This state is exclusive (excl.); based on your implementation's state priority ranking, the duration is only allotted to the highest-ranked state if multiple states are active at the same time.
Offline Activity (Excl.)	The total time agents spent in the 'Offline activity' state. This state includes agents' activities regarding non-live interactions, such as communication via email. This state is exclusive (excl.); based on your implementation's state priority ranking, the duration is only allotted to the highest-ranked state if multiple states are active at the same time.
Online Activity (Excl.)	The total time agents have spent in the 'Online activity' state, in which an agent is actively involved in an interaction (for example, having a call or a chat conversation). This state is

Label	Tooltip
	exclusive (excl.); if multiple states are active at the same time, the duration is allotted to a state based on your system's settings.
Proposing (Excl.)	The total time agents spent in the 'Proposing' state. This state is only available for automatic outbound calls in preview mode. In this state, the agent analyzes the contact before requesting the call. This state is exclusive (excl.); based on your implementation's state priority ranking, the duration is only allotted to the highest-ranked state if multiple states are active at the same time.
Self-Managed Activity (Excl.)	The total time agents spent in the 'Self-managed activity' state. An agent typically activates this state if they have to do work outside the typical interactions workflow, and therefore cannot receive interactions from the system. In other words, agents in the 'Self-managed activity' state are not on a break and are still working, but are not available to take on new interactions from queues via your automatic system. Examples vary based on your system and may include having meetings, reading emails unrelated to interactions (such as internal company emails), working in the back office, and other similar activities.This state is exclusive (excl.); if multiple states are active at the same time, the duration is alloted to a state based on your system's settings.
Working Activity (Excl.)	The total time agents have spent handling interactions and contacts in all states related to these activities. This state includes the time spent by agents in the exclusive 'Self-Managed Activity', 'Proposing', 'Offering', 'Online Activity', 'On Hold', 'Offline Activity', 'Wrapup', 'External Activity' and 'External Call' states.
Wrapup (Excl.)	The total time agents have spent in the 'Wrapup' state. In this state, agents perform offline activities needed to complete the interaction after finishing communication with the contact. This state is exclusive (excl.); if multiple states are active at the same time, the duration is allotted to a state based on your system's settings.

Some agent states in the table are described as **exclusive**. This refers to situations where multiple states may be applied to the same agent at the same time.

A state priority ranking is applied to avoid issues with data and duration values. Issues may, for example, include situations where the sums of all agent states are larger than the total logged in time for the agent, due to the fact that in some situations two or more states were active at the same time. Based on this priority ranking, only the state with the highest ranking is allotted the duration in question to avoid such issues.

> **Note**
> The state priority ranking depends on your implementation and system, so it may vary from the examples described in this document.

Exclusive states example

Consider the following example:

Your system may be set up in such a way that the "Self-managed activity" state includes all actions an agent may perform that are not a direct result of automatic interaction assigning (such as from a queue via your system).

One of these actions may be performing an external call, for example, if an agent directly calls a contact (as opposed to interacting with a contact assigned to them from a queue). "External call" is also an agent state, and in this situation, it is technically triggered at the same time as the "Self-managed activity" state, which means that their durations overlap.

Let's assume that the agent has spent 1 hour in the "Self-managed activity" state in a day. In that time, half of that one hour was spent in a meeting or replying to internal emails, while the other half hour was spent in direct external calls. The following issues may occur due to the two states overlapping:

- If the half hour spent doing external calls is allocated to both the "Self-managed activity" state and the "External call" state, the total duration of the agent's actions in this time would amount to one and a half hour (1h "Self-managed activity" + 0.5h "External call"), which is an incorrect calculation.
- If the whole hour was allocated to "Self-managed activity", the important information that the agent did, in fact, spend half an hour doing direct external calls would be missed. Overall, this would mean that the data is not presented in adequate detail.

In order to solve these issues and to be able to efficiently work with data for these simultaneous states, a priority list is defined for the states. This is done to ensure that, in case multiple states are active at the same time, the most important data and durations are recorded and assigned to the correct state. In this example, the "External call" state is given priority, and therefore the duration of this state is allotted to "External call", and not "Self-managed activity". In the end, the data will show that the agent spent half an hour working on direct external calls, and another half an hour doing other self-managed work.

Ultimately, which states are exclusive and specifically how the exclusivity and state priority ranking is implemented may vary based on your system settings.

Queue Performance

This is a summary report of your queues' performance in relation to interactions. With this report, you can find out more information about the way interactions are handled in queues.

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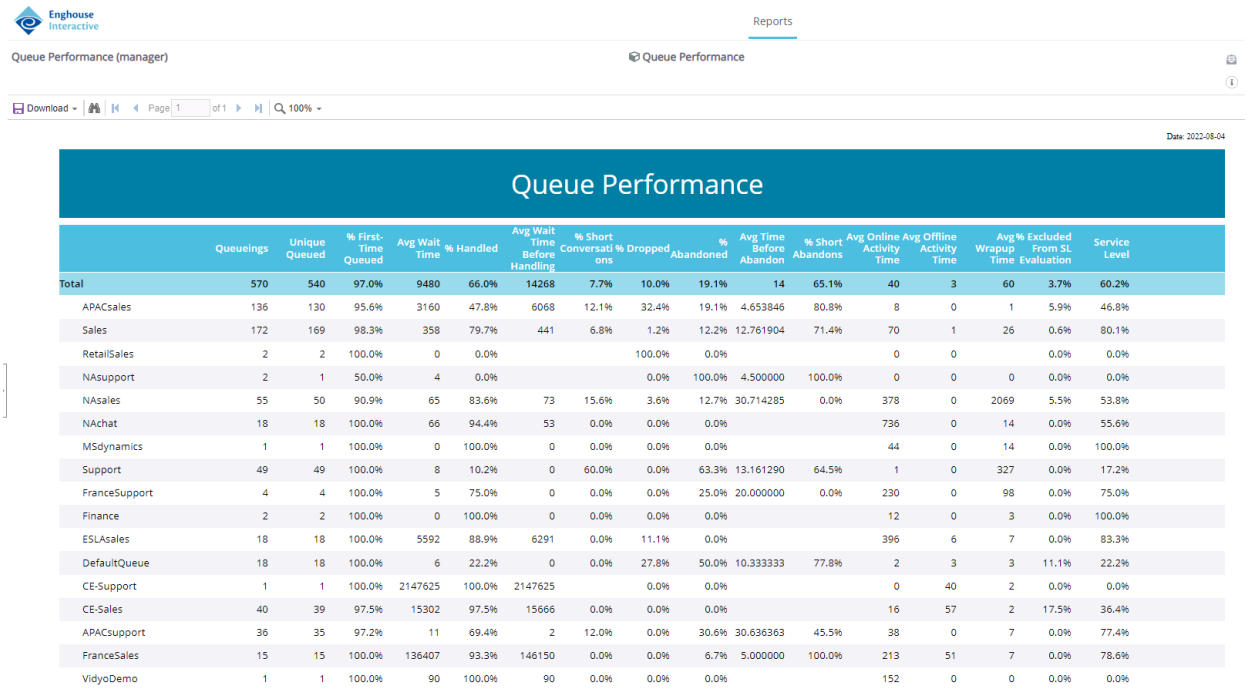


Enghouse Interactive

Reports

Queue Performance (manager)

Queue Performance

Download | Page 1 of 1 | 100%

Date: 2022-08-04

Queue Performance

	Queueings	Unique Queued	% First-Time Queued	Avg Wait Time	% Handled	Avg Wait Time Before Handling	% Short Conversations	% Dropped	% Abandoned	Avg Time Before Abandon	% Short Abandons	Avg Online Activity Time	Avg Offline Activity Time	Avg Wrapup Time	% Excluded From SL Evaluation	Service Level
Total	**570**	**540**	**97.0%**	**9480**	**66.0%**	**14268**	**7.7%**	**10.0%**	**19.1%**	**14**	**65.1%**	**40**	**3**	**60**	**3.7%**	**60.2%**
APACsales	136	130	95.6%	3160	47.8%	6068	12.1%	32.4%	19.1%	4.653846	80.8%	8	0	1	5.9%	46.8%
Sales	172	169	98.3%	358	79.7%	441	6.8%	1.2%	12.2%	12.761904	71.4%	70	1	26	0.6%	80.1%
RetailSales	2	2	100.0%	0	0.0%			100.0%	0.0%			0	0		0.0%	0.0%
NAsupport	2	1	50.0%	4	0.0%			0.0%	100.0%	4.500000	100.0%	0	0	0	0.0%	0.0%
NAsales	55	50	90.9%	65	83.6%	73	15.6%	3.6%	12.7%	30.714285	0.0%	378	0	2069	5.5%	53.8%
NAchat	18	18	100.0%	66	94.4%	53	0.0%	0.0%	0.0%			736	0	14	0.0%	55.6%
MSdynamics	1	1	100.0%	0	100.0%	0	0.0%	0.0%	0.0%			44	0	14	0.0%	100.0%
Support	49	49	100.0%	8	10.2%	0	60.0%	0.0%	63.3%	13.161290	64.5%	1	0	327	0.0%	17.2%
FranceSupport	4	4	100.0%	5	75.0%	0	0.0%	0.0%	25.0%	20.000000	0.0%	230	0	98	0.0%	75.0%
Finance	2	2	100.0%	0	100.0%	0	0.0%	0.0%	0.0%			12	0	3	0.0%	100.0%
ESLAsales	18	18	100.0%	5592	88.9%	6291	0.0%	11.1%	0.0%			396	6	7	0.0%	83.3%
DefaultQueue	18	18	100.0%	6	22.2%	0	0.0%	27.8%	50.0%	10.333333	77.8%	2	3	3	11.1%	22.2%
CE-Support	1	1	100.0%	2147625	100.0%	2147625		0.0%	0.0%			0	40	2	0.0%	0.0%
CE-Sales	40	39	97.5%	15302	97.5%	15666	0.0%	0.0%	0.0%			16	57	2	17.5%	36.4%
APACsupport	36	35	97.2%	11	69.4%	2	12.0%	0.0%	30.6%	30.636363	45.5%	38	0	7	0.0%	77.4%
FranceSales	15	15	100.0%	136407	93.3%	146150	0.0%	0.0%	6.7%	5.000000	100.0%	213	51	7	0.0%	78.6%
VidyoDemo	1	1	100.0%	90	100.0%	90	0.0%	0.0%	0.0%			152	0	0	0.0%	0.0%

The asset description is divided into chapters as shown below. In these chapters, you can find out what the goal of the asset is, which filters you can use for your data, how to set up your asset, which graphical elements you can use in it (if they are available), and, finally, what each metric refers to.

Objectives

The Queue Performance Standard Report allows contact center supervisors to gain insight into the performances of a queue. With the report, you can view and analyze a variety of valuable data on how the queue is performing, and keep an eye on the most important KPIs for your queues.

The goal of this standard report is to give you a detailed perception of your queues. By gaining this information, you can improve the performance of your queues in a variety of ways, such as by finding the causes and lowering the rate of abandoned calls, reducing queue waiting times, understanding the reasons behind delays in your queues or identifying the needs for additional staffing. This data can also be used to identify distribution bottlenecks, upgrade staff skill sets, improve the time an end user spends interacting with the Contact Center and its agents, etc.

Data about queues and their behavior and performance is fundamental input for every contact center supervisor or manager.

Report parameters

> **Note**
> While Reporting standard assets, such as standard reports, can be implemented to many environments with little to no change, it is important to note that some settings, options and results may still vary based on your individual implementation, data and system settings. In case you have any questions, refer to your Administrator or Reporting contact.

Filters

You can use multiple filters for this report. From a list of available filters, select one or more values for which you want to see the data. For non-datetime filters, you can select all available values, search for specific values, or clear all selected values from the dropdown list. Mandatory filters are marked with *, while non-mandatory filters can be left empty, i.e., unset, in which case this filter will not influence the report.

Depending on the filter, the following options may be available in the dropdown filters along with the data from your data source:

- **- Not defined -**: Choosing this option includes the fields in your data source that have no (null) data.
- **- Not assigned -**: Selecting this option includes cases where an agent was not assigned to an interaction, such as for self-service interactions.

The following filters can be used for this report:

- **Company**: Choose the companies you want to see data for from the list of available companies.
- **Contact center**: Select the contact centers whose data you want to analyze in the report.
- **Queue ID**: Choose the specific queue(s) whose data you want to use in the report.
- **Interaction type**: Choose the type of interaction you want to see the data for. You can select one, multiple, or all options. The interaction types are as follows:
  - **Consultation**: Interactions done within the call center where agents consult with other agents, supervisors etc. to resolve an issue.
  - **Outbound**: Interactions initiated by an agent and directed to a contact through any available media types.
  - **Inbound**: Interactions initiated by the contact and aimed at the contact center through any available media types.
  - **Internal**: Interactions initiated for internal contact center purposes (and not directed toward contacts).

- **Media type**: From the dropdown list, select the specific media type(s) you want to filter your interactions by.
- **Agent ID**: From a list of available agents, select one or more agents for which you want to see the report data.

Analysis groups

Analysis groups are data groups created within your database to facilitate use of reports and to group together various information based on certain shared criteria. This is not data collected through e.g. use of contact center software, and then stored in your database; it is a way of categorizing the collected data. You can filter by the following grouping options:

- **Analysis group set**: Choose a set of higher-level grouping within the database. This can include data from agent, queue, and other analysis groups, based on your implementation. This set groups together components from other available analysis groups, based on shared criteria.
- **Queue analysis group**: From the dropdown list, choose a grouping of queues within the database, based on shared criteria and intended to facilitate analysis within the report.
- **Agent analysis group**: From the list, select the needed grouping of agents within the database, based on shared criteria and used to facilitate analysis within the report. This value is independent of the 'Agent group' value, used in some reports.

Time selection

- **Date interval**: Choose the dates (interval) or relative time frame for the data. Switch between the Time frame and Interval mode by clicking the toggle just above the Date filter.
  - **from - to**: Enter the **from** and **to** dates for your filter manually or select them from the dropdown menu.
  - **Time frame**: Toggle the **Time frame** switch on to use the time frame mode. From the dropdown lists, choose the time unit (Days, Weeks, Months, Quarters or Years) and the relative time frame for your report.
- **Time interval (from and to)**: Choose the time interval in which the interactions you want to see started. From a list of full hours (24-hour format), choose the starting and ending hour to show your data in.

Settings

Time zone

With this setting, you can choose which time zone to view your data, filters and settings in. See *Report settings on page 10* for more information.

Duration display format

The **Duration display format** setting lets you define how you want to display the durations shown in your report. For more information, see this section.

Thresholds

In this report, you can also set certain thresholds for your data. All thresholds are mandatory (marked with *).

> **Note**
> The thresholds are defined in seconds and include the value entered in the field. For example, if you enter 20 as the threshold value, the relevant outcomes that were reached within 20 seconds or less (=< 20s) will be used.

In this report, you can set the following thresholds:

- **Short Conversations Threshold (s)**: If an interaction is finished (handled or other) within the time (in seconds) defined with this threshold, it is considered a "short conversation". This threshold refers to the time between when both parties start an active and live conversation (online activity), for example when both the agent and the contact pick up the call, to the moment when the live conversation stops, for example when the contact hangs up.
- **Short Abandons Threshold (s)**: With this threshold, you define within how many seconds an interaction needs to be abandoned to be considered a "short abandon". For example, if you enter 20 as the threshold value, only abandons that occurred in the first 20 seconds (including the 20 second mark) in a queue will be considered "short abandons".
- **Service Level Threshold (s)**: This threshold defines within how many seconds an interaction needs to be handled in order to comply with the Service Level Agreement. This includes all steps of an interaction up until the moment it is assigned the "Handled" outcome. For example, if you enter 60 as the threshold value, only interactions from queues that were handled within 60 seconds (including the 60 second mark) will be considered as complying with the SLA.

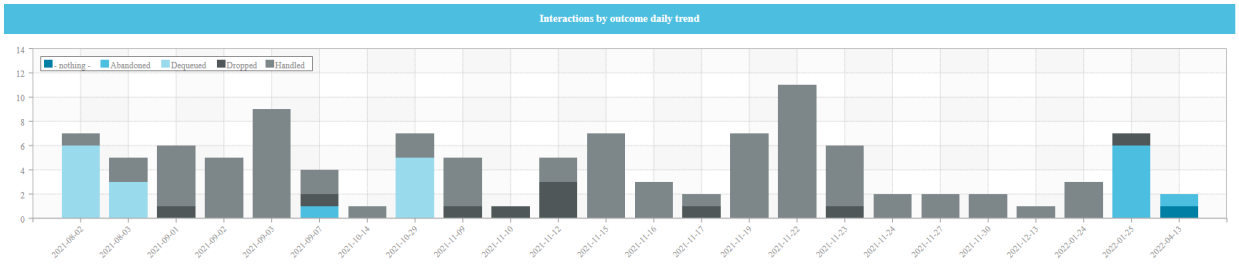
Graphical elements

In this report, you can utilize various types of graphical elements to visualize your data. You can choose to use none of the graphical elements, one of them, or more of them at the same time. If you choose to use any of the graphical elements, they are placed at the top of the report and one under the other (if multiple are selected), as can be seen in the example in *Settings on page 10*.

The following graphical elements can be used with this report:

- **Pie chart**: The pie chart in this standard report is titled **Interaction by outcome distribution**, and it shows the percentage distribution of all individual queueing outcomes compared to the total number of queueing outcomes. A legend is available on the left side of the chart to show the colors and their corresponding outcomes.
  - Example: The image below shows an example pie chart with a total number of 110 interactions. Out of those 1109 interactions, 77 interactions had the "Handled" outcome, which is 70%, resulting in the "Handled" slice taking up just over two thirds of the graph, as the size of the slice is relative to the percentage, compared to the whole.

- **Column chart**: The column chart titled **Interactions by outcome daily trend** represents the daily changes in the interaction outcomes data. The Y-Axis represents the number of interactions; the X-Axis represents the individual days (dates) in your filtered data range. Each column corresponds to one day. The columns of the chart are stacked, meaning that all interaction outcomes within one day are stacked on top of each other, with their height proportionate to the number of interactions for each outcome. A legend is available by the chart to show the colors and their corresponding outcomes.



Date display format

Using this setting, you can modify the way your date data is displayed in the report. See *Report settings on page 10* for more information.

Show filters and settings sumup

Selecting this checkbox shows you a sumup of all report details. See more in *Report settings on page 10*.

Data grouping levels

Up to three data grouping levels can be set up for the parameters in this report. Only the first (lowest) level is mandatory; the other grouping levels are optional and can be left unset. If unset, these data grouping levels will not be shown in the report.

The following parameters can be selected from dropdown lists and used as the data grouping levels in this report:

- **Agent ID**: Agents' UserID without their full name.
- **Agent info**: Additional information about the agent, such as the agents' full (first and last) name, with their UserID in brackets.
- **Agents Group**: Name of the agents group.
- **Agent Analysis Group**: Grouping of agents used for analysis.
- **Company**: Name of the company.
- **Contact center**: Name of the contact center.
- **Interaction type**: Type, or direction, of the interaction.
- **Media type**: The type of media used for interactions in queues.
- **Queue ID**: Alphanumerical ID of the queue.
- **Queue description**: Description or descriptive name of the queue.
- **Queue Analysis Group**: Grouping of queues used for analysis.
- **Year/Month/Day/Hour**: Time unit to be used as a grouping level.

> **Note**
> The totals in each row of this are not calculated through the sums of the details shown in the report, but instead take advantage of the different rows available in your DWH. This means that depending on your settings, the totals in the rows of your report may be higher or lower than the sum of the individual detail values below them. For more information on how a specific total is calculated, contact your System Administrator.

Standard views

Standard views are report views available to users by default. See more about them in *Standard Views on page 6*.

This report includes the following standard views:

- **Queue Performance**: This view gives users general information about the performance of queues in their system, including wait times, number of queueings, various types of interactions, and the service level percentage.
- **Queue Negative States Summary**: This view gives a summary of the performance of queues in the context of dropped, abandoned and other negative state interactions in queues.

Report values definition

Report values are part of the report itself and are shown once the report is generated. They are predefined and cannot be modified through the report settings and filters. In practical terms, report values are the columns shown in your report. Each metric shown in your report's columns is described below in more detail; explanations are also available on hover over the individual metrics in the report.

The list below shows **all the available metrics and KPIs** that could be used as columns in your report, but which will rarely all be used at the same time and in the same report. The actual metrics used in a report may vary based on your implementation and the use of **report views**, as created by the Report Designer. See *Report Views on page 4* for more information.

Caution

Some UI elements, such as tooltips and labels, can be customized to fit your team's or company's needs. However, if any customizations are applied, especially for the values presented in the table below, this document does **not** reflect them. The person/entity that created the customized content has the sole responsibility for informing all the users of their system about the customizations. Contact your system administrator for more information on your customizations.

The following report values are used in the Queue Performance standard report:

Label	Description
First-Time Queued	The total number of interactions that have been queued for the first time. Such interactions are considered new interactions, which have previously not been in any queue. If an interaction is requeued, it is not once again counted as a new interaction in the queue it was moved to.
Queueings	The total number of times, or events where interactions were placed in any queue through any of the methods available in your system. This includes interactions that were requeued, moved from another queue etc.
Unique Queued	The total number of times unique and distinct interactions were placed in a queue. For example, if a single interaction is queued multiple times, it is only counted as one unique queued interaction (with multiple queueings). The specific way unique queued interactions are counted depends on the level of aggregation your are using. You can find more details in the Queue Performance documentation.
% First-Time Queued	The percentage of first-time queued interactions (which were queued for the first time in any queue), compared to the total number of all Queueings (all events where interactions were placed in a queue through any method and any number of times).
Avg Wait Time	The average time an interaction spends waiting in a queue. The calculation is made based on all waiting times of all queued interactions (all Queueings), regardless of the outcome. If an interaction is moved from one queue to another or requeued, the waiting time is reset; all such restarted waiting times are also included in this calculation.
Max Wait Time	The maximum time an interaction spends waiting in a queue. The calculation is made based on all waiting times of all queued interactions (all Queueings), regardless of the outcome. If an interaction is moved from one queue to another or requeued, the waiting time is reset; all such restarted waiting times are also included in this calculation.
Handled	The total number of interactions that exited the queue to be handled by an agent.
% Handled	The percentage of interactions that exited a queue to be handled by an agent, compared to the total number of all Queueings (all events where interactions were placed in a queue through any method and any number of times).
Avg Wait Time Before Handling	The average time a contact spent waiting in queue before their interaction was handled by an agent.
Short Conversations /	The total number of handled interactions that were handled by an agent within a configured threshold (Short conversations threshold). This threshold refers to the time

Label	Description
Short Conv.	between when both parties start an active and live conversation (online activity), for example when both the agent and the contact pick up the call, to the moment when the live conversation stops, for example when the contact hangs up.
% Short Conversations	The percentage of Short conversations, compared to the total number of all successfully handled online interactions. Offline interactions, such as those through email, are not included in this metric.
Dropped	The total number of queued interactions that were disconnected by the system, in cases such as all agents disconnecting when there are contacts still in queue or the wait time being too long, or due to a technical error. The causes for dropping a call by the system may vary based on your system settings.
% Dropped	The percentage of dropped interactions compared to the total number of all Queueings (all events where interactions were placed in a queue through any method and any number of times).
Abandoned	The total number of queued interactions that were abandoned by the contact while waiting to be handled by an agent.
% Abandoned	The percentage of queued interactions that were abandoned by the contact while waiting to be handled by an agent, compared to the total number of all Queueings (all events where interactions were placed in a queue through any method and any number of times).
Avg Time Before Abandon	The average time contacts spent waiting in queue to be handled by an agent before they abandoned the interaction.
Short Abandons	The total number of queued interactions that were abandoned by the contact within the configured Short abandons threshold (defined in report settings). The threshold refers to the time an interaction spent in the queue before it was abandoned by the contact.
% Short Abandons	The percentage of all queued interactions that were abandoned by the contact within the configured Short abandons threshold, compared to the total number of interactions that were abandoned by the contacts.
Dequeued	The total number of all queued interactions that were removed from a queue for reasons such as being moved to another resource (e.g. another queue or self-service application). Interactions that were dropped, abandoned (by the contact) or handled (by an agent) are not counted as dequeued interactions.
% Dequeued	The percentage of interactions that were removed from a queue, compared to the total number of all Queueings (all events where interactions were placed in a queue through any method and any number of times).
Online Activity Time	The total time agents have spent in the ‘Online activity’. In this state, agents are actively working on a live interaction (such as participating in a call or having a conversation via chat).
Max Online	The maximum time an interaction has spent in the 'Online activity' state.In this state,

Label	Description
Activity Time	agents are actively working on a live interaction (such as participating in a call or having a conversation via chat). The displayed value is the longest single duration an interaction has spent in this state out of all queueings of interactions that were in this state. Note that if the same interaction is handled multiple times, each of the separate durations are counted individually, and are not summed up.
Avg Online Activity Time	The average time an interaction has spent in the 'Online activity' state. In this state, agents are actively working on a live interaction (such as participating in a call or having a conversation via chat). This takes into account all queueings of interactions that were in this state.
Online Activity Time (on hold excl.)	The total time agents have spent in the ‘Online activity’, not including the time that the interactions have spent in the ‘On hold’ state. In this state, agents are actively working on a live interaction (such as participating in a call or having a conversation via chat).
Max Online Activity Time (on hold excl.)	The maximum time an interaction has spent in the ‘Online activity’ state, not including the time that the interaction has spent in the ‘On hold’ state. In this state, agents are actively working on a live interaction (such as participating in a call or having a conversation via chat). The displayed value is the longest single duration an interaction has spent in this state out of all queueings of interactions that were in this state. Note that if the same interaction is handled multiple times, each of the separate durations are counted individually, and are not summed up.
Avg Online Activity Time (on hold excl.)	The average time an interaction has spent in the ‘Online activity’ state, not including the time that the interaction has spent in the ‘On hold’ state. In this state, agents are actively working on a live interaction (such as participating in a call or having a conversation via chat). This takes into account all queueings of interactions that were in this state.
Hold Time	The total time agents have spent in the ‘On hold’ state. In this state, the contact is placed on hold in situations such as if the agent needs to look up a solution. If an interaction is placed on hold multiple times, all the hold times are added up.
Max Hold Time	The maximum time an interaction has spent in the‘On hold’ state. In this state, the contact is placed on hold in situations such as if the agent needs to look up a solution. The displayed value is the longest single duration an interaction has spent in this state out of all queueings of interactions that were in this state.If an interaction is placed on hold multiple times, all the hold times are added up.
Avg Hold Time	The average time interactions spend in the‘On hold’ state. In this state, the contact is placed on hold in situations such as if the agent needs to look up a solution. If an interaction is placed on hold multiple times, all the hold times are added up.
Offline Activity Time	The total time agents have spent in the ‘Offline activity’ state. This state includes interactions that are non-live, such as communicating with contacts via email. Note that if the same interaction is handled multiple times, each of the separate durations are counted individually, and are not summed up.
Max Offline Activity Time	The maximum time an interaction has spent in the 'Offline activity' state. This state includes interactions that are non-live, such as communicating with contacts via email. The

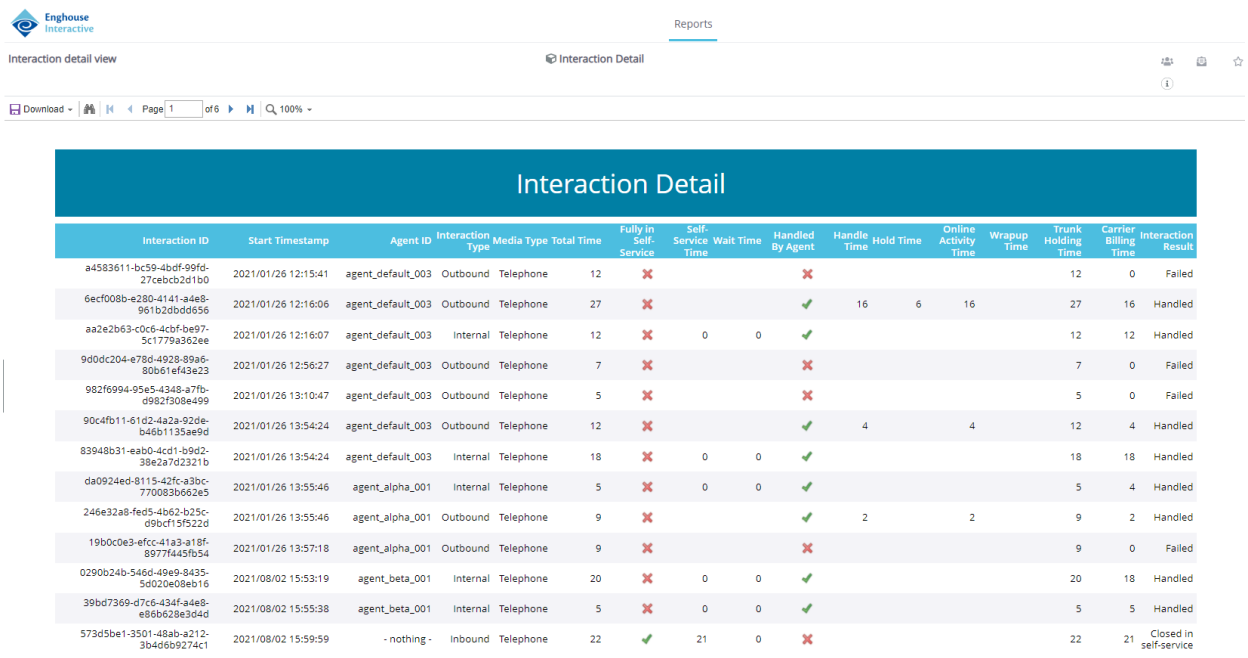
Label	Description
	displayed value is the longest single duration an interaction has spent in this state out of all queueings of interactions that were in this state. Note that if the same interaction is handled multiple times, each of the separate durations are counted individually, and are not summed up.
Avg Offline Activity Time	The average time an interaction has spent in the 'Offline activity' state. In this state, agents are working on non-live interactions, such as communicating with contacts via email. This takes into account all queueings of interactions that were in this state.
Wrapup Time	The total time agents have spent in the ‘Wrapup’ state. In this state, agents perform offline activities needed to complete the interaction after finishing communication with the contact.
Max Wrapup Time	The maximum time an interaction has spent in the 'Wrapup' state. In this state, the agents, after finishing communication with a contact, set up the wrapup code of an interaction during postprocessing. The displayed value is the longest single duration an interaction has spent in this state out of all queueings of interactions that were in this state. Note that if the same interaction is handled multiple times, each of the separate durations are counted individually, and are not summed up.
Avg Wrapup Time	The average time an interaction has spent in the 'Wrapup' state. In this state, the agents, after finishing communication with a contact, set up the wrapup code of an interaction during postprocessing. This takes into account all queueings of interactions that were in this state.
External Activity Time	The total time interactions have spent in the ‘External activity’ state. This is a state where, having finished communication with a contact (and the wrapup), the agent works on relevant data entry in the organization’s application. The ‘External activity’ state comes after the ‘Online/Offline activity’ and ‘Wrapup’ (if applicable) states.
Max External Activity Time	The maximum time an interaction has spent in the 'External activity' state. This is a state where, having finished communication with a contact (and the wrapup), the agent works on relevant data entry in the organization's (external) application. The 'External activity' state comes after the 'Online/Offline activity' and 'Wrapup' (if applicable) states.The displayed value is the longest single duration an interaction has spent in this state out of all queueings of interactions that were in this state. Note that if the same interaction is handled multiple times, each of the separate durations are counted individually, and are not summed up.
Avg External Activity Time	The average time an interaction has spent in the 'External activity' state. This is a state where, having finished communication with a contact (and the wrapup), the agent works on relevant data entry in the organization's (external) application. The 'External activity' state comes after the 'Online/Offline activity' and 'Wrapup' (if applicable) states. This takes into account all queueings of interactions that were in this state.
Excluded From SL Evaluation	The number of interactions that are excluded from the Service Level Agreement, which means that they were not handled within the configured Service level threshold.
% Excluded	The percentage of interactions that were excluded from the Service Level, compared to

Label	Description
From SL Evaluation	the total number of all Queueings (interactions that were placed in a queue through any method and any number of times).
Service Level	A service level is a percentage calculation showing how well standards are met for customer service. In this report, it refers to the percentage of interactions handled within the configured Service level threshold, compared to the total number of queued interactions. The Service level threshold is defined within the report itself, and it specifies the time in which an interaction needs to be handled to be considered within the Service level agreement. In other words, if an interaction is handled in a longer time than specified in by the Service level threshold, it does not comply with the service level. Short abandons and any interactions that were excluded from the service level by default are not considered queued interactions, and are therefore not included in this calculation.
Requested Callbacks	The total number of queued interactions that requested a callback.
Offered Callbacks	The total number of callback interactions proposed by the system for handling.
Rejected Callbacks	The total number of offered callback interactions that were rejected by an agent.
Started Callbacks	The total number of offered callback interactions that an agent started handling.
Handled Callbacks	The total number of offered callback interactions successfully handled and completed by an agent.
% Rejected Callbacks	The percentage of rejected callback interaction compared to the total number of offered callbacks.
Avg First Schedule Delay	The average time difference between the moment a callback was requested and the moment it was first offered by the system to an agent.
Avg Callback Handle Delay	The average time difference between the moment a callback was requested and the moment an agent first started handling the callback interaction.
Callback Handle Time	The total time agents have spent handling callback interactions.
Max Callback Handle Time	The maximum time an agent has spent handling a single callback interaction.
Avg Callback Handle Time	The average time agents spend handling a callback interaction.
Callback Online Activity Time	The total time spent by agents in the 'Online Activity' state while handling callback interactions.
Max Callback Online Activity	The maximum time an agent has spent in the 'Online Activity' state while handling a callback interaction.

Label	Description
Time	
Avg Callback Online Activity Time	The average time spent by agents in the 'Online Activity' state while handling callback interactions.
Callback Online Activity Time (on hold excl.)	The total time callback interactions have spent in the 'Online activity' state, not including the time that the interactions spent in the 'On hold' state. In this state, agents are actively working on a live interaction (such as participating in a call or having a conversation via chat). Note that if the same interaction is handled multiple times, each of the separate durations are counted individually, and are not summed up.
Max Callback Online Activity Time (on hold excl.)	The maximum time a callback interaction has spent in the 'Online activity' state, not including the time that the interaction has spent in the 'On hold' state. In this state, agents are actively working on a live interaction (such as participating in a call or having a conversation via chat). The displayed value is the longest single duration an interaction has spent in this state out of all queueings of interactions that were in this state. Note that if the same interaction is handled multiple times, each of the separate durations are counted individually, and are not summed up.
Avg Callback Online Activity Time (on hold excl.)	The average time a callback interaction has spent in the 'Online activity' state, not including the time that the interaction has spent in the 'On hold' state. In this state, agents are actively working on a live interaction (such as participating in a call or having a conversation via chat). This takes into account all queueings of interactions that were in this state.
Callback Wrapup Time	The total time callback interactions have spent in the 'Wrapup' state. In this state, after finishing an interaction with a contact, the agents set up the wrapup code of the interaction during postprocessing.
Max Callback Wrapup Time	The maximum time a callback interaction has spent in the 'Wrapup' state. In this state, the agents, after finishing communication with a contact, set up the wrapup code of an interaction during postprocessing. The displayed value is the longest single duration a callback interaction has spent in this state out of all queueings of interactions that were in this state. Note that if the same interaction is handled multiple times, each of the separate durations are counted individually, and are not summed up.
Avg Callback Wrapup Time	The average time a callback interaction has spent in the 'Wrapup' state. In this state, the agents, after finishing communication with a contact, set up the wrapup code of an interaction during postprocessing. This takes into account all queueings of callback interactions that were in this state.
Callback Secondary Answer	The total number of times a callback interaction had to be handled again, after the first handling of the callback.
Avg Callback Secondary Answer	The average number of times a callback interaction had to be handled again, after the first handling of the callback.

Interaction Detail

This is a detailed report about individual interactions in your contact center. In this report, you can gain insight into the most important metrics related to interactions and the steps they go through in your contact center.



Interaction Detail

Interaction ID	Start Timestamp	Agent ID	Interaction Type	Media Type	Total Time	Fully in Self-Service	Self-Service Time	Wait Time	Handled By Agent	Handle Time	Hold Time	Online Activity Time	Wrapup Time	Trunk Holding Time	Carrier Billing Time	Interaction Result
a4583611-bc59-4bdf-99fd-27cebcb2d1b0	2021/01/26 12:15:41	agent_default_003	Outbound	Telephone	12	✗			✗					12	0	Failed
6ecf008b-e280-4141-a4e8-961b2dbdd656	2021/01/26 12:16:06	agent_default_003	Outbound	Telephone	27	✗			✓	16	6	16		27	16	Handled
aa2e2b63-c0c6-4cbf-be97-5c1779a362ee	2021/01/26 12:16:07	agent_default_003	Internal	Telephone	12	✗	0	0	✓					12	12	Handled
9d0dc204-e78d-4928-89a6-80b61ef43e23	2021/01/26 12:56:27	agent_default_003	Outbound	Telephone	7	✗			✗					7	0	Failed
982f6994-95e5-4348-a7fb-d982f308e499	2021/01/26 13:10:47	agent_default_003	Outbound	Telephone	5	✗			✗					5	0	Failed
90c4fb11-61d2-4a2a-92de-b46b1135ae9d	2021/01/26 13:54:24	agent_default_003	Outbound	Telephone	12	✗			✓	4		4		12	4	Handled
83948b31-eab0-4cd1-b9d2-38e2a7d2321b	2021/01/26 13:54:24	agent_default_003	Internal	Telephone	18	✗	0	0	✓					18	18	Handled
da0924ed-8115-42fc-a3bc-770083b662e5	2021/01/26 13:55:46	agent_alpha_001	Internal	Telephone	5	✗	0	0	✓					5	4	Handled
246e32a8-fed5-4b62-b25c-d9bcf15f522d	2021/01/26 13:55:46	agent_alpha_001	Outbound	Telephone	9	✗			✓	2		2		9	2	Handled
19b0c0e3-efcc-41a3-a18f-8977f445fb54	2021/01/26 13:57:18	agent_alpha_001	Outbound	Telephone	9	✗			✗					9	0	Failed
0290b24b-546d-49e9-8435-5d020e08eb16	2021/08/02 15:53:19	agent_beta_001	Internal	Telephone	20	✗	0	0	✓					20	18	Handled
39bd7369-d7c6-434f-a4e8-e86b628e3d4d	2021/08/02 15:55:38	agent_beta_001	Internal	Telephone	5	✗	0	0	✓					5	5	Handled
573d5be1-3501-48ab-a212-3b4d6b9274c1	2021/08/02 15:59:59	- nothing -	Inbound	Telephone	22	✓	21	0	✗					22	21	Closed in self-service

The asset description is divided into chapters as shown below. In these chapters, you can find out what the goal of the asset is, which filters you can use for your data, how to set up your asset, which graphical elements you can use in it (if they are available), and, finally, what each metric refers to.

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Objectives

The Interaction Detail Standard Report gives contact center supervisors insight into how interactions are treated in the contact center standard interaction workflow. This helps the users of the report understand how interactions are handled in the contact center, which aspects are performing well, and which may need optimizing.

The aim of this standard report is to provide detailed insight into each individual interaction in the contact center. By providing information about the used media, time spent in certain states, interaction outcomes, as well as the contact and specific steps the interaction has gone through, users of this report can deduce which skills are necessary for agents in certain situations, analyze potential needs for staffing, and identify opportunities for further optimization if necessary. In short, this report helps users understand the most important KPIs for each individual interaction in the contact center.

Data about interactions and their performance is fundamental input for every contact center supervisor or manager.

Report parameters

> **Note**
> While Reporting standard assets, such as standard reports, can be implemented to many environments with little to no change, it is important to note that some settings, options and results may still vary based on your individual implementation, data and system settings. In case you have any questions, refer to your Administrator or Reporting contact.

The report values, that is, the report column titles are predefined by the report designer. However, the data that will be shown in the report can be modified by using filters and other settings to adapt the displayed information to your needs.

Filters

You can use multiple filters for this report. From a list of available filters, select one or more values for which you want to see the data. For non-datetime filters, you can select all available values, search for specific values, or clear all selected values from the dropdown list. Mandatory filters are marked with *, while non-mandatory filters can be left empty, i.e., unset, in which case this filter will not influence the report.

Depending on the filter, the following options may be available in the dropdown filters along with the data from your data source:

- **- Not defined -**: Choosing this option includes the fields in your data source that have no (null) data.
- **- Not assigned -**: Selecting this option includes cases where an agent was not assigned to an interaction, such as for self-service interactions.

The following filters can be used for this report:

- **Company**: Choose the companies you want to see data for from the list of available companies.
- **Contact center**: Select the contact centers whose data you want to analyze in the report.
- **Contact list**: From the dropdown list, choose the list of contacts and related information that you want to use. These are loaded into the system to use for outbound campaigns. The use may vary based on your implementation.
- **Contact list segment**: Choose the subset of the contact list. The segments are grouped by a specific criteria, such as to be used for the same marketing campaign, in a specific contact center, or other purposes.

- **Campaign class**: Define which campaign classes you want to filter your data by. A campaign class is a group of similar or related marketing campaigns with the same overarching goal or purpose. The list of campaign classes available here depends on your implementation.
- **Marketing campaign**: Select the individual campaigns you want to filter your data by. A (marketing) campaign is a group of outbound activities with the goal of advertising a service or product to contacts. Typically, this would be aimed at a specific set of contacts, such as first-time buyers, or contacts in a specific location, etc. The list of campaigns available here depends on your implementation.
- **Service**: From the dropdown list of available services, choose one or multiple services you want to filter your data by. A service refers a grouping of queues and/or agents assigned to an application or following a specific, specialized workflow that defines how to handle interactions. Examples include a credit card service for a bank, a complaints service etc. The list of services available here depends on your implementation.
- **Queue ID**: Choose the specific queue(s) whose data you want to use in the report.
- **Agent group**: From the dropdown list, select the agents groups whose data you want to use for the report.
- **Agent ID**: From a list of available agents, select one or more agents for which you want to see the report data. The list shows the agents available for this report in your system.
- **Interaction type**: Choose the type of interaction you want to see the data for. You can select one, multiple, or all options. The interaction types are as follows:
    - **Consultation**: Interactions done within the call center where agents consult with other agents, supervisors etc. to resolve an issue.
    - **Outbound**: Interactions initiated by an agent and directed to a contact through any available media types.
    - **Inbound**: Interactions initiated by the contact and aimed at the contact center through any available media types.
    - **Internal**: Interactions initiated for internal contact center purposes (and not directed toward contacts).
- **Media type**: From the dropdown list, select the specific media type(s) you want to filter your interactions by.
- **Contact ID**: Once you enter an alphanumeric string in this field, data is filtered by fields that contain this string. For example, if you enter the numbers "123", all interactions that contain this string (in any position in its full Contact ID string, but together and in this order) as part of the Contact ID will be shown.
- **Source address**: Enter an alphanumeric string in this field to filter data by fields that contain this string. For example, if you enter the numbers "987", all interactions that contain this string (in any position in its full Source address string, but together and in this order) as part of the Source address will be shown.
- **Target address**: Entering an alphanumeric string in this field filters data by fields that contain this string. For example, if you enter the numbers "456", all interactions that contain this string (in any position in its full Target address string, but together and in this order) as part of the Target address will be shown.
- **Required skills**: From the dropdown list, select the relevant necessary or useful skills you want to filter your data by.
- **Transfer address**: Enter an alphanumeric string to filter your data by the Transfer destination address. All interactions containing that exact string in their Transfer destination address field (in any position) will be shown.
- **First self-service app**: From the dropdown list, choose the first self-service application that the contact accessed to filter your interactions.

- **Handling state**: From the dropdown list, select the handling status of your interactions. For example, they can be handled in self-service, by an agent, or unhandled.
- **Interaction outcome**: Choose one or multiple interaction results that you want to filter your interactions by. This refers to how the interaction was finalized, and covers all possible outcomes, including the agent, contact or the system ending the interaction.

Time selection

- **Date interval**: Choose the dates (interval) or relative time frame for the data. Switch between the Time frame and Interval mode by clicking the toggle just above the Date filter.
  - **from - to**: Enter the **from** and **to** dates for your filter manually or select them from the dropdown menu.
  - **Time frame**: Toggle the **Time frame** switch on to use the time frame mode. From the dropdown lists, choose the time unit (Days, Weeks, Months, Quarters or Years) and the relative time frame for your report.
- **Time interval (from and to)**: Choose the time interval in which the interactions you want to see started. From a list of full hours (24-hour format), choose the starting and ending hour to show your data in.

Settings

Time zone

With this setting, you can choose which time zone to view your data, filters and settings in. See *Report settings on page 10* for more information.

Duration display format

The **Duration display format** setting lets you define how you want to display the durations shown in your report. For more information, see this section.

Timestamp display format

By modifying this setting, you can choose how your timestamp data is displayed in the report. See *Report settings on page 10* for more information.

Show filters and settings sumup

Selecting this checkbox shows you a sumup of all report details. See more in *Report settings on page 10*.

Interaction Journey Report UUID

Enter the UUID of the detail report that you want to open when you click an interaction in the report. See more in *Master-Detail report relationships on page 15*.

Standard views

Standard views are report views available to users by default. See more about them in *Standard Views on page 6*.

This report includes the following standard views:

- **Interaction Detail**: This view provides detailed information about the interactions in your system, their type, the media used for them, the time they spent in various states, etc.
- **Agent Interactions Detail**: With this view, users can see more details about the way agents interacted with the interactions in their system.
- **Outbound Interaction Detail**: This view shows users detailed information about the outbound interactions in their system.

Report values definition

Report values are part of the report itself and are shown once the report is generated. They are predefined and cannot be modified through the report settings and filters. In practical terms, report values are the columns shown in your report. Each metric shown in your report's columns is described below in more detail; explanations are also available on hover over the individual metrics in the report.

The list below shows **all the available metrics and KPIs** that could be used as columns in your report, but which will rarely all be used at the same time and in the same report. The actual metrics used in a report may vary based on your implementation and the use of **report views**, as created by the Report Designer. See *Report Views on page 4* for more information.

> **Caution**
> Some UI elements, such as tooltips and labels, can be customized to fit your team's or company's needs. However, if any customizations are applied, especially for the values presented in the table below, this document does **not** reflect them. The person/entity that created the customized content has the sole responsibility for informing all the users of their system about the customizations. Contact your system administrator for more information on your customizations.

The following report values are used in the Interaction Detail standard report:

Label	Tooltip
Interaction ID	Unique alphanumeric string identifier of an interaction.
Start Timestamp	The timestamp of when the interaction started.This refers to the moment the interaction was initiated and registered in the contact center, regardless of which channel the interaction was started through and what states and outcomes might occur later on. For example, this would refer to when an agent initiates a call (for outbound calls), when the customer sends in a chat request (for chat), when an email arrives in the contact center (for emails), or the contact center receives a call from a contact (for inbound calls).
End	The timestamp of when the interaction was finished and wrapped up. This refers to the

Label	Tooltip
Timestamp	moment the interaction was resolved in the contact center, regardless of which channel the interaction was started through, what states it went through and what the outcome of the interaction is. For example, this would refer to when a call is finished (e.g., the contact hangs up and the agent completes the wrap-up), a chat interaction is finalized (e.g., contact leaves the chat and the agent completes the wrap-up) etc.
Agent Group	Name of the group the agent belongs to.
Agent ID	The unique identifying alphanumeric string of the agent that handled the interaction. If multiple agents handled the same interaction, only the ID of the last agent that handled the interaction is shown.
Agent Info	Agents' full (first and last) name, with their User ID in brackets.
Interaction Type	The type, or direction, of the interaction. This refers to the way contacts, i.e. interactions were initiated and connected with the system. This includes outbound (started by an agent and aimed at a contact), inbound (started by a contact and aimed at the contact center), and internal (for internal contact center purposes) interactions.
Media Type	The type of media, or communication channel, used for an interaction. This refers to the tools that the contact and agent or contact center used to communicate. Media types include, but are not limited to, emails, chat, telephone etc. The available types may vary based on your implementation.
Contact ID	Unique alphanumeric string identifier of a contact. If your integration supports it, the Contact ID will remain the same for every interaction that involves the same contact (e.g. same phone number or email address).
Source Address	The telephone number, email address or other source media identifier of the entity (contact or contact center / agent) that initiated the interaction. For example, for a call, the source address is the ANI.
Target Address	The telephone number, email address or other target media identifier of the entity (contact or contact center / agent) that received the interaction. For example, for a call, the target address is the DNIS.
Required Skills	List of skills that were required for a specific interaction (if applicable). For example, 'French' could be a required skill, where the agent is required to know the language to be able to successfully complete the interaction.
Required Skills with Level	List of skills that were required for a specific interaction (if applicable) with the requested minimum knowledge level of that skill. For example, French=5 (if, in this example, the knowledge levels for French are 1 to 5, where 5 is the highest).
Required Skills with Level and Status	List of skills that were required for a specific interaction (if applicable) with the requested knowledge level of that skill and the information of whether that skill has been released. If a skill has the '(released)' flag in this column, that means that an agent with the skill could not be found for an interaction and the skill was therefore no longer requested by the system. For example, if there is no agent available that matches a skill, after a certain wait time, the system automatically removes the skill to be able to assign the interaction to someone, as

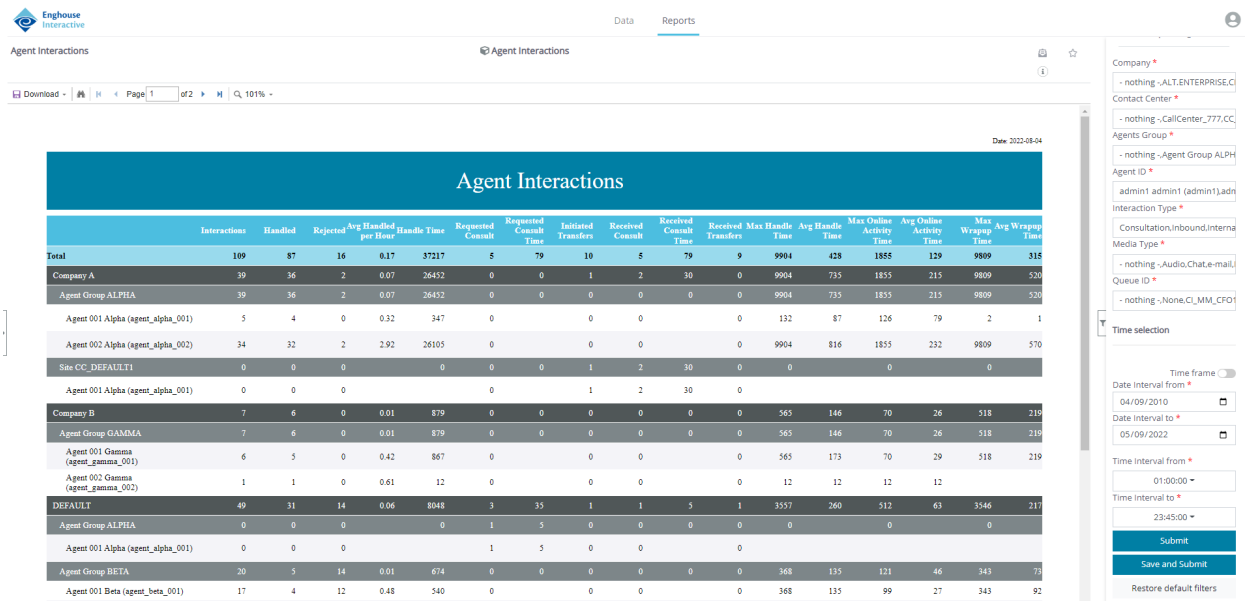
Label	Tooltip
	opposed for the contact just waiting until someone with that skill becomes available, if this is at all possible.
Delivery Priority	The delivery priority level of a queued interaction. The higher the priority of an interaction, the sooner (before lower-priority interactions) it will be delivered to an agent for further handling. The definition of the priority levels depends on your implementation, contact your system administrator for more information.
Total Time	The total duration time of an interaction from the moment it entered the system until the moment it was fully finished, including all waiting times, processing, external activity and wrapup times.
Transferred Counter	The total number of times the related interaction was transferred.
Transfer Address	For interactions that were transferred or moved to an external resource (e.g. external call number, external email etc.), this is the address of the resource the interaction was moved to.
First Attempt Resolution	A flag used to indicate if the interaction was resolved at the first attempt. This means that the interaction was resolved without the contact needing to initiate additional follow-up interactions to try to solve the same issue. If the interaction was resolved/handled with the first attempt, a green checkmark is shown. If not, a red X is shown.
First Self-Service App.	The name of the first self-service application that handled the interaction (if applicable).
Fully in Self-Service	A flag used to indicate if the interaction was fully handled within a self-service application. If the interaction was resolved/handled in its entirety through self-service, a green checkmark is shown. If not, a red X is shown.
Self-service Time	The total time the interaction has spent within a self-service application.
Queue ID	Unique alphanumeric string identifier of a queue.
Queue Description	A (brief) description of the queue, if provided in your implementation.
Wait Time	The total time the interaction spent waiting in a queue. If an interaction is requeued or moved to a different queue, the waiting time is reset. All wait time values are included in this calculation.
Queue Greeting Time	The total time the interaction has spent waiting in the queue while listening to the system's greeting message.
Delivery Notification Time	Time duration of the message used to inform the contact that they are about to be connected with the agent. Typically, this may include information such as the location or center the contact is at, or some instructions regarding the interaction.
Handled By	A flag used to indicate if an interaction has been handled by an agent (as opposed to, for

Label	Tooltip
Agent	example, only through a self-service application). If the interaction was handled by an agent, a green checkmark is shown. If not, a red X is shown.
Handle Time	The total time the interaction has spent in the 'Handling' state. In this state, an agent is actively working on the interaction. The specific steps that are included in the 'Handling' state vary based on your implementation.
Proposing time	The total time the interaction has spent in the 'Proposing' state. This state is only available for automatic outbound calls in preview mode. In this state, the agent analyzes the contact before requesting the call.
Offering Time	The total time an interaction has spent in the 'Offering' state. In this state, the interaction (inbound/outbound call, chat, email...) has been initiated, but the participants are not connected or actively communicating yet. For example, for incoming calls, this state's duration is equal to the ring time of the agent's phone (before they pick up). For outgoing calls, it is the ring time of the contact's phone. For chat, it is the time between the chat offer and the agent's first response; etc.
Hold Counter	The total number of times the related interaction was placed on hold.
Hold Time	The total time the interaction has spent in the 'On hold' state. In this state, the contact is placed on hold in situations such as if the agent needs to look up a solution. If an interaction is placed on hold multiple times, all the hold times are added up.
Requested Consults	The total number of consultations that were initiated by the agent. Consultations are calls made during other calls by an agent to consult another agent regarding an issue.
Requested Consult Time	The total time the agent has spent in consultations that were initiated by the agent. Consultations are calls made during other calls by an agent to consult another agent regarding an issue.
Online Activity Time	The total time an interaction has spent in the 'Online activity' state. In this state, agents are actively working on a live interaction (such as participating in a call or having a conversation via chat).
Wrapup Time	The total time the interaction has spent in the 'Wrapup' state. In this state, after finishing an interaction with a contact, the agents set up the wrapup code of the interaction during post-processing.
Offline Activity Time	The total time an interaction has spent in the 'Offline activity' state. This state includes interactions that are non-live, such as communicating with contacts via email. Note that if the same interaction is handled multiple times, each of the separate durations are counted individually, and are not summed up.
External Activity Time	The total time an interaction has spent in the 'External activity' state. This is a state where, having finished communication with a contact (and the wrapup), the agent works on relevant data entry in the organization's application. The 'External activity' state comes after the 'Online/Offline activity' and 'Wrapup' (if applicable) states.
Trunk Hold	The total time the interaction was taking up the trunk in order to resolve an interaction

Label	Tooltip
Time	(such as an inbound call) by the agent. This includes all states where a phone line (trunk) is busy due to an undergoing interaction. The specific calculation for the trunk holding time may vary based on your implementation, but typically it includes all queue-related states, self-service, online activity etc.
Carrier Billing Time	The total time spent in an interaction that is billed by the network carrier. Typically, this is the time the interaction spent in a call (including waiting in queue, on hold and in an active conversation), after the call is picked up until it is hung up.
Composing Time	The total time for this interaction that it took the agent to enter the relevant information for an outbound interaction, such as entering a phone number for an outbound call.
Interaction Outcome	The result of the interaction. An interaction can either be handled by an agent or other resource, such as self-service, cut off by the contact, for example while still in queue (abandoned), or stopped by the system, for example because the waiting time is too long (dropped).
Interaction Outcome Detail	The result of the interaction with additional details about the outcome.
Terminating Party	The party responsible for ending the interaction. Options include 'Agent' if the interaction was ended by the agent, 'Contact' if it was ended by the contact for any reason, such as abandoned in queue or closed by the contact after handling, and 'System', in cases such as if the interaction was dropped by the system due to an issue or other reasons.
Contact List	List of contacts and related information, loaded into the system to use for outbound campaigns.
Contact List Segment	A subset of the contact list grouped by specific criteria, such as to be used for the same marketing campaign, in a specific contact center, or other purposes.
Wrapup code	The wrapup code an agent assigns to an interaction during the 'Wrapup' state. Usually, this includes assigning relevant attributes to an interaction, such as 'Sale' or 'Already a customer' etc.
Wrapup code and value	The wrapup code an agent assigns to an interaction during the 'Wrapup' state, along with its value. Usually, this includes assigning relevant attributes to an interaction, such as 'Sale' or 'Already a customer' etc., and a corresponding boolean value (true/false), such as 'Sale=TRUE, Already a customer=FALSE'.
Campaign Class	The name of the campaign class the interacton was a part of. A campaign class is a group of similar or related marketing campaigns with the same overarching goal or purpose.
Marketing Campaign	The name of the marketing campaign the interaction was a part of. A marketing campaign is a group of outbound activities with the goal of advertising a service or product to contacts.

Agent Interactions

This is a summary report of the activities agents engaged in when handling interactions and of the results of their work with interactions.



	Interactions	Handled	Rejected	Avg Handled per Hour	Handle Time	Requested Consult	Requested Consult Time	Initiated Transfers	Received Consult	Received Consult Time	Received Transfers	Max Handle Time	Avg Handle Time	Max Online Activity Time	Avg Online Activity Time	Max Wrapup Time	Avg Wrapup Time
Total	109	87	16	0.17	37217	5	79	10	5	79	9	9904	428	1855	129	9809	315
Company A	39	36	2	0.07	26452	0	0	1	2	30	0	9904	735	1855	215	9809	520
Agent Group ALPHA	39	36	2	0.07	26452	0	0	0	0	0	0	9904	735	1855	215	9809	520
Agent 001 Alpha (agent_alpha_001)	5	4	0	0.32	347	0		0	0		0	132	87	126	79	2	1
Agent 002 Alpha (agent_alpha_002)	34	32	2	2.92	26105	0		0	0		0	9904	816	1855	232	9809	570
Site CC_DEFAULT1	0	0	0		0	0	0	1	2	30	0	0		0		0	
Agent 001 Alpha (agent_alpha_001)	0	0	0			0		1	2	30	0						
Company B	7	6	0	0.01	879	0	0	0	0	0	0	565	146	70	26	518	219
Agent Group GAMMA	7	6	0	0.01	879	0	0	0	0	0	0	565	146	70	26	518	219
Agent 001 Gamma (agent_gamma_001)	6	5	0	0.42	867	0		0	0		0	565	173	70	29	518	219
Agent 002 Gamma (agent_gamma_002)	1	1	0	0.61	12	0		0	0		0	12	12	12	12		
DEFAULT	49	31	14	0.06	8048	3	35	1	1	5	1	3557	260	512	63	3546	217
Agent Group ALPHA	0	0	0		0	1	5	0	0	0	0	0		0		0	
Agent 001 Alpha (agent_alpha_001)	0	0	0			1	5	0	0		0						
Agent Group BETA	20	5	14	0.01	674	0	0	0	0	0	0	368	135	121	46	343	73
Agent 001 Beta (agent_beta_001)	17	4	12	0.48	540	0		0	0		0	368	135	99	27	343	92

The asset description is divided into chapters as shown below. In these chapters, you can find out what the goal of the asset is, which filters you can use for your data, how to set up your asset, which graphical elements you can use in it (if they are available), and, finally, what each metric refers to.

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Objectives

The goal of the Agent Interactions Standard Report is to help contact center supervisors keep track of the activity agents engage in with the interactions they receive.

With this report, supervisors can optimize the agents' performance by identifying how agents spend their time when dealing with interactions. This also provides insight into other areas, for example, where additional agent training may be beneficial.

Additionally, with the help of this report, supervisors can assess and analyze the performance of the contact center agents based on the number of interactions the agents worked on, and the results of these interactions. Furthermore, supervisors can use the information shown in this report to optimize the interaction handling time by reviewing the time the agents have spent working in each interaction state.

This report should be usable for multiple environments with little or no need for adaptation.

Report parameters

> **Note**
> While Reporting standard assets, such as standard reports, can be implemented to many environments with little to no change, it is important to note that some settings, options and results may still vary based on your individual implementation, data and system settings. In case you have any questions, refer to your Administrator or Reporting contact.

Filters

You can use multiple filters for this report. From a list of available filters, select one or more values for which you want to see the data. For non-datetime filters, you can select all available values, search for specific values, or clear all selected values from the dropdown list. Mandatory filters are marked with *, while non-mandatory filters can be left empty, i.e., unset, in which case this filter will not influence the report.

Depending on the filter, the following options may be available in the dropdown filters along with the data from your data source:

- **- Not defined -**: Choosing this option includes the fields in your data source that have no (null) data.
- **- Not assigned -**: Selecting this option includes cases where an agent was not assigned to an interaction, such as for self-service interactions.

The following filters can be used for this report:

- **Company**: Choose the companies you want to see data for from the list of available companies.
- **Contact center**: Select the contact centers whose data you want to analyze in the report.
- **Agents group**: From the dropdown list, select the agents groups whose data you want to use for the report.
- **Agent ID**: From a list of available agents, select one or more agents for which you want to see the report data. The list shows the agents available for this report in your system.
- **Interaction type**: Choose the type, or direction, of interaction you want to filter your data by. The following options are available:
  - **Consultation**: Interactions done within the call center where agents consult with other agents, supervisors etc. to resolve an issue.
  - **Outbound**: Interactions initiated by the contact center and received by the contact, regardless of the media type, or channel, of the interaction.
  - **Inbound**: Interactions initiated by the contact and received by the contact center, regardless of the media type, or channel, of the interaction.

    - **Internal**: Interactions within the contact center for internal purposes, such as consultations with other agents etc.
- **Media type**: From the dropdown list, select the specific media type(s) you want to filter your interactions by. This refers to the type of media, or communication channel, used for an interaction, such as emails, chat, telephone etc. The list of media types available here depends on your implementation.
- **Queue ID**: From a list of available queue IDs, select one or more for which you want to see the report data. The list shows the queue IDs available for this report in your system.

Time selection

- **Date interval**: Choose the dates (interval) or relative time frame for the data. Switch between the Time frame and Interval mode by clicking the toggle just above the Date filter.
    - **from - to**: Enter the **from** and **to** dates for your filter manually or select them from the dropdown menu.
    - **Time frame**: Toggle the **Time frame** switch on to use the time frame mode. From the dropdown lists, choose the time unit (Days, Weeks, Months, Quarters or Years) and the relative time frame for your report.
- **Time interval (from and to)**: Choose the time interval in which the interactions you want to see started. From a list of full hours (24-hour format), choose the starting and ending hour to show your data in.

Settings

Time zone

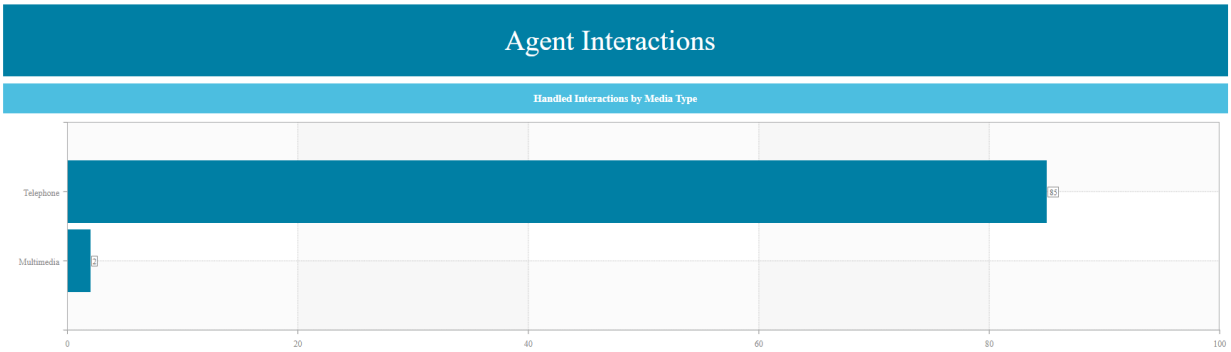
With this setting, you can choose which time zone to view your data, filters and settings in. See *Report settings on page 10* for more information.

Graphical Elements

In this report, you can utilize a predefined **bar chart** to visualize your data. If you choose to use this graphical element, it will be placed at the top of the report, as can be seen in the example in *Objectives on page 48*.

The chart is described as follows:

- The chart represents the absolute number of interactions that were handled (as opposed to e.g. dropped or abandoned), distributed by media types.
- The Y-Axis shows the media types, such as telephone or emails. Each bar is one media type.
- The X-Axis represents the absolute number of handled interactions. The length of the bar reflects the number of interactions for that media type.
- At the end of each bar, there is also a number showing the total number of handled interactions for that media type.



Duration display format

The **Duration display format** setting lets you define how you want to display the durations shown in your report. For more information, see this section.

Date display format

Using this setting, you can modify the way your date data is displayed in the report. See *Report settings on page 10* for more information.

Show filters and settings sumup

Selecting this checkbox shows you a sumup of all report details. See more in *Report settings on page 10*.

Show rows with 0 handled interactions

Selecting this checkbox includes rows in the report that did not have any handled interactions. Leaving this checkbox cleared removes such rows from the generated report.

Data grouping levels

Up to three data grouping levels can be set up for the parameters in this report. Only the first (lowest) level is mandatory; the other grouping levels are optional and can be left unset. If unset, these data grouping levels will not be shown in the report.

The following parameters can be selected from dropdown lists and used as the data grouping levels in this report:

- **Agent ID**: Agents' UserID without their full name.
- **Agent info**: Additional information about the agents, such as the agents' full (first and last) name, with their UserID in brackets.
- **Agent group**: Name of the agents group.
- **Company**: Name of the company.
- **Contact center**: Name of the contact center.
- **Interaction type**: The "direction" of the interaction.

- **Media type**: The channel used by the agent to handle the interaction; examples include telephone, emails, chat etc.
- **Queue ID**: Alphanumerical ID of the queue.
- **Queue description**: Description or descriptive name of the queue.
- **Year/Month/Day/Hour**: Time unit to be used as a grouping level.

> **Note**
> The totals in each row of this are not calculated through the sums of the details shown in the report, but instead take advantage of the different rows available in your DWH. This means that depending on your settings, the totals in the rows of your report may be higher or lower than the sum of the individual detail values below them. For more information on how a specific total is calculated, contact your System Administrator.

Standard views

Standard views are report views available to users by default. See more about them in *Standard Views on page 6*.

This report includes the following standard views:

- **Agent Interactions**: This view shows you the most relevant metrics related to the way agents work with interactions, such as the number of handled interactions, the time spent in each agent state, etc.

Report values definition

Report values are part of the report itself and are shown once the report is generated. They are predefined and cannot be modified through the report settings and filters. In practical terms, report values are the columns shown in your report. Each metric shown in your report's columns is described below in more detail; explanations are also available on hover over the individual metrics in the report.

The list below shows **all the available metrics and KPIs** that could be used as columns in your report, but which will rarely all be used at the same time and in the same report. The actual metrics used in a report may vary based on your implementation and the use of **report views**, as created by the Report Designer. See *Report Views on page 4* for more information.

> **Caution**
> Some UI elements, such as tooltips and labels, can be customized to fit your team's or company's needs. However, if any customizations are applied, especially for the values presented in the table below, this document does **not** reflect them. The person/entity that created the customized content has the sole responsibility for informing all the users of their system about the customizations. Contact your system administrator for more information on your customizations.

The following report values are used in the Agent Interactions standard report:

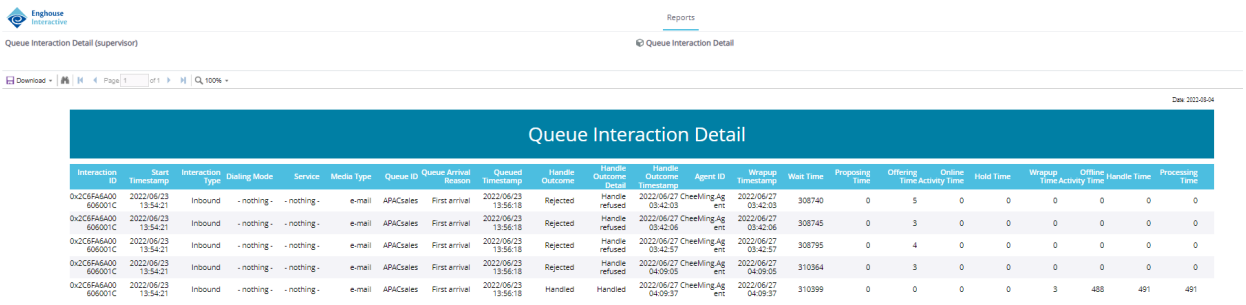
Label	Description
Interactions	The total number of interactions that were offered or proposed to the agent, including

Label	Description
	manual calls. This refers to both inbound and outbound interactions, as well as interactions that, e.g., were offered to the agent, but the agent declined.
Handled	The total number of interactions handled by an agent.
Rejected	The total number of interactions offered to and rejected by an agent.
Avg Handled per Hour	Average number of interactions handled by an agent per hour. This is calculated by dividing the number of handled interactions by the total time agents have spent logged in to the system. This includes all agent states in the system (including breaks) and their durations.
Handle Time	The total time the agent has spent handling interactions of all media types. In this state, an agent is actively working on the interaction. The specific steps that are included in the 'Handling' state vary based on your implementation.
Requested Consult	The total number of consultations that were initiated by the agent. Consultations are calls made during other calls by an agent to consult another agent regarding an issue.
Requested Consult Time	The total time the agent has spent in consultations that were initiated by the agent.Consultations are calls made during other calls by an agent to consult another agent regarding an issue.
Initiated Transfers	Total number of interactions that were transferred by this agent to another agent, queue, self-service application or external number.
Received Consult	Total number of consultations that agents participated in that were not initiated by agents themselves. Consultations are calls made during other calls by an agent to consult another agent regarding an issue.
Received Consult Time	The total time the agent has spent in consultations that were not initiated by the agent. Consultations are calls made during other calls by an agent to consult another agent regarding an issue.
Received Transfers	The total number of interactions that have been transferred to an agent from other agents.
Max Handle Time	The maximum time an agent has spent handling interactions of all media types. This includes online and/or offline activity, wrapup and external activity. In this state, an agent is actively working on the interaction. The specific steps that are included in the 'Handling' state vary based on your implementation.
Average Handle Time	The average handle time per handled interaction. This is calculated by dividing the total handle time by the total number of handled interactions. The specific steps that are included in the 'Handling' state vary based on your implementation.
Max Online Activity Time	The maximum time an interaction has spent in the 'Online activity' state. In this state, agents are actively working on a live interaction (such as participating in a call or having a conversation via chat). The displayed value is the longest single duration an interaction has spent in this state out of all queueings of interactions that were in this state. Note that if the same interaction is handled multiple times, each of the separate durations are counted indi-

Label	Description
	vidually, and are not summed up.
Avg Online Activity Time	The average time an interaction has spent in the 'Online activity' state. In this state, agents are actively working on a live interaction (such as participating in a call or having a conversation via chat). This takes into account all queueings of interactions that were in this state.
Max Wrapup Time	The maximum time an interaction has spent in the 'Wrapup' state. In this state, the agents, after finishing communication with a contact, set up the wrapup code of an interaction during postprocessing. The displayed value is the longest single duration an interaction has spent in this state out of all queueings of interactions that were in this state. Note that if the same interaction is handled multiple times, each of the separate durations are counted individually, and are not summed up.
Avg Wrapup Time	The average time an interaction has spent in the 'Wrapup' state. In this state, the agents, after finishing communication with a contact, set up the wrapup code of an interaction during postprocessing. This takes into account all queueings of interactions that were in this state.
Logged in	The total time agents have spent logged in to the system. This includes all agent states in the system (including breaks) and their durations.

Queue Interaction Detail

This is a detailed report about the behavior of interactions in queues across a defined period of time. With this report, users can analyze and better understand the handling of interactions in your contact center's queues.



The asset description is divided into chapters as shown below. In these chapters, you can find out what the goal of the asset is, which filters you can use for your data, how to set up your asset, which graphical elements you can use in it (if they are available), and, finally, what each metric refers to.

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Objectives

The goal of the Queue Interaction Detail Standard Report is to enable contact center supervisors and other end users to perceive the behavior of each queue across a defied time period. With this report, users can facilitate the identification and analysis of possible issues with the interaction handling in queues, they can establish potential needs for staffing and find new optimization opportunities.

From a functional standpoint, this standard report can help you understand the performance of your queues in the contact center by getting the most important KPIs related to the interactions associated with a queue. Ultimately, the information gained in this way can be used to make improvements in your workflow and process.

This report should be usable for multiple environments with little or no need for adaptation.

Report parameters

> **Note**
> While Reporting standard assets, such as standard reports, can be implemented to many environments with little to no change, it is important to note that some settings, options and results may still vary based on your individual implementation, data and system settings. In case you have any questions, refer to your Administrator or Reporting contact.

Filters

You can use multiple filters for this report. From a list of available filters, select one or more values for which you want to see the data. For non-datetime filters, you can select all available values, search for specific values, or clear all selected values from the dropdown list. Mandatory filters are marked with *, while non-mandatory filters can be left empty, i.e., unset, in which case this filter will not influence the report.

Depending on the filter, the following options may be available in the dropdown filters along with the data from your data source:

- **- Not defined -**: Choosing this option includes the fields in your data source that have no (null) data.
- **- Not assigned -**: Selecting this option includes cases where an agent was not assigned to an interaction, such as for self-service interactions.

The following filters can be used for this report:

- **Company**: Choose the companies you want to see data for from the list of available companies.
- **Contact center**: Select the contact centers whose data you want to analyze in the report.
- **Contact ID**: Once you enter an alphanumeric string in this field, data is filtered by fields that contain this string. For example, if you enter the numbers "123", all interactions that contain this string (in any position in the full Contact ID string, but together and in this order) as part of the Contact ID will be shown. This filter is not mandatory.
- **Interaction type**: Choose the type, or direction, of interaction you want to filter your data by. The following options are available:
  - **Consultation**: Interactions done within the call center where agents consult with other agents, supervisors etc. to resolve an issue.
  - **Outbound**: Interactions initiated by the contact center and received by the contact, regardless of the media type, or channel, of the interaction.
  - **Inbound**: Interactions initiated by the contact and received by the contact center, regardless of the media type, or channel, of the interaction.
  - **Internal**: Interactions within the contact center for internal purposes, such as consultations with other agents etc.
- **Dialing mode**: Define the dialing mode you want to filter your data by. A dialing mode refers to the way out-bound interactions and campaigns are dialed. You can choose none, one or multiple of the following options:
  - **Predictive**: In this mode, the system predicts which contact is appropriate for an interaction or campaign and assigns it to an agent. The system is automated and can place a call even before an agent

is available. This system is typically used with a large number of contacts that need to be dialed in order to maximize efficiency.

    - **Preview**: In this mode, a system-predefined set of contact data is given to the agent for a preview; based on information relevant for the interaction or campaign goal, the agent chooses which contact to dial. This is typically used with a smaller number of contacts that need to be dialed. This method could be described as semi-manual.
    - **Manual**: In this mode, agents place outbound calls manually, typically by entering the contact number themselves, as opposed to being assigned a contact by the system.
- **Service**: Choose the service you want to filter your data by. A service is a grouping of queues and/or agents assigned to an application or following a specific, specialized workflow that defines how to handle interactions. Examples include a credit card service for a bank, a complaints service, customer service etc. The list of services available here depends on your implementation.
- **Campaign Class**: Define which campaign classes you want to filter your data by. A campaign class is a group of similar or related marketing campaigns with the same overarching goal or purpose. The list of campaign classes available here depends on your implementation.
- **Marketing Campaign**: Select the individual campaigns you want to filter your data by. A (marketing) campaign is a group of outbound activities with the goal of advertising a service or product to contacts. Typically, this would be aimed at a specific set of contacts, such as first-time buyers, or contacts in a specific location, etc. The list of campaigns available here depends on your implementation.
- **Media Type**: From the dropdown list, select the specific media type(s) you want to filter your interactions by. This refers to the type of media, or communication channel, used for an interaction, such as emails, chat, telephone etc. The list of media types available here depends on your implementation.
- **Source address**: Enter an alphanumeric string to filter your data by the telephone number, email address or other source media identifier of the entity that initiated the interaction (contact or contact center / agent). For example, for a call, the source address is the ANI. This filter is not mandatory.
- **Target address**: Enter an alphanumeric string to filter your data by the telephone number, email address or other target media identifier of the entity that received the interaction (contact or contact center / agent). For example, for a call, the target address is the DNIS. This filter is not mandatory.
- **First Self-Service App.**: Choose from a list of self-service applications available in your system to select one or multiple names of your self-service applications that handled the interaction. Data will be filtered to show all interactions for which the selected applications were the first self-service applications to handle the interaction.
- **Queue ID**: Choose the specific queue(s) whose data you want to use in the report.
- **Queue Arrival Reason**: Choose which reasons for queue entry you want to filter your data by. The list of reasons available here depends on your implementation. Typical reasons include the following:
    - **First arrival**: For interactions that have entered this (and any other queue) for the first time since the interaction has been registered in your system.
    - **Overflowed from another queue**: For interactions that were moved from one queue to another due to the first queue being full and unable to take on further interactions.
    - **Requeued by agent**: For interactions that reached an agent and were being handled, but then were placed back into a queue by the agent for reasons such as needing a different service or similar.
- **Handle outcome**: From a list of available handling results, choose which outcome of an you want to filter your data by. The list of outcomes depends on your implementation. Typical outcomes include the following:

    - **Abandoned**: The contact abandoned the interaction while waiting in queue, before getting in direct contact with an agent or before finishing their interaction through self-service.
    - **Dequeued**: The interaction was removed from queue for reasons such as being moved to another resource (e.g. another queue or self-service application).
    - **Dropped**: The interaction was disconnected by the system in cases such as technical errors, all agents disconnecting while there are contacts still in queue, the waiting time being too long, or other reasons of this nature.
    - **Failed**: The interaction failed to connect.
    - **Rejected**: The agent refused the interaction that was offered to them by the system or was a direct inbound call for the agent.
    - **Handled**: An agent accepted and actively worked on the interaction. The specific steps and actions that are included in achieving the 'Handled' outcome vary based on your implementation.
- **Agent ID**: From a list of available agents, select one or more agents for which you want to see the report data.
- **Interaction transferred**: Choose if you want to filter data by interactions that have been transferred, or those that have not been transferred (e.g. to an external resource or other transfer destination, based on your implementation).
- **Transfer address**: Enter an alphanumeric string to filter your data by the external resource (e.g. external call number, external email etc.) address the interaction was transferred to (if applicable). This filter is not mandatory.
- **Minimum Expected Wait Time**: Enter a minimum expected wait time (in seconds) to filter data that is within the estimated time. For example, if you enter 120 seconds in this field, all interactions with a minimum estimated wait time of 120 seconds or more will be shown. This filter is not mandatory.
- **Required Skills**: From a list of skills that were required for a specific interaction, choose one or multiple skills you want to filter your data by. This filter is not mandatory.

Time selection

- **Date interval**: Choose the dates (interval) or relative time frame for the data. Switch between the Time frame and Interval mode by clicking the toggle just above the Date filter.
    - **from - to**: Enter the **from** and **to** dates for your filter manually or select them from the dropdown menu.
    - **Time frame**: Toggle the **Time frame** switch on to use the time frame mode. From the dropdown lists, choose the time unit (Days, Weeks, Months, Quarters or Years) and the relative time frame for your report.
- **Time interval (from and to)**: Choose the time interval in which the interactions you want to see started. From a list of full hours (24-hour format), choose the starting and ending hour to show your data in.

Settings

Time zone

With this setting, you can choose which time zone to view your data, filters and settings in. See *Report settings on page 10* for more information.

Duration display format

The **Duration display format** setting lets you define how you want to display the durations shown in your report. For more information, see this section.

Event for date and time filters

Define which even you are filtering your date and time by. Based on which option you choose, varying timestamps will be used as reference for the date and time when data is filtered. The following options are available:

- **Interaction begin**: With this option, the start of the interaction is taken as the basis for the date and time filters. This setting refers to the moment the interaction is initiated and registered in your system. For example, an interaction can start the moment the agent starts an outbound call, as the contact's phone rings, even before the contact has picked up.
- **Interaction queueing**: Choosing this will set the moment the interaction is placed in a queue as the basis for your date and time filters.
- **Queueing outcome**: This setting defines the moment a queueing outcome is assigned to an interaction as the reference point for your date and time filters. A queueing outcome in fact means that the interaction is finished - either because it was resolved (handled) by the agent, abandoned by the contact while in queue, or dropped by the system for e.g. technical issues.

Timestamp display format

By modifying this setting, you can choose how your timestamp data is displayed in the report. See *Report settings on page 10* for more information.

Show filters and settings sumup

Selecting this checkbox shows you a sumup of all report details. See more in *Report settings on page 10*.

Queues only

Select this checkbox to only show interactions related to queues. For example, if this is selected, manual calls will not be shown.

Contacts only

Select this checkbox to only show interactions directly linked to a contact. For example, if this is selected, anonymous contacts will not be shown.

Interaction Journey Report UUID

Enter the UUID of the detail report that you want to open when you click an interaction in the report. See more in *Master-Detail report relationships on page 15*.

Standard views

Standard views are report views available to users by default. See more about them in *Standard Views on page 6*.

This report includes the following standard views:

- **Contact Interaction Detail**: With this view, users can see the details of interactions that are directly related to a contact, such as a phone number. This view does not show, for example, interactions with unknown or anonymous contacts.
- **Queue Interaction Detail**: This view provides you with a general overview of the behavior interactions that were placed in queues.
- **Queue Negative States Detail**: This view gives more information about negative states in your queues and shows details about interactions that were removed from queue before handling.

Report values definition

Report values are part of the report itself and are shown once the report is generated. They are predefined and cannot be modified through the report settings and filters. In practical terms, report values are the columns shown in your report. Each metric shown in your report's columns is described below in more detail; explanations are also available on hover over the individual metrics in the report.

The list below shows **all the available metrics and KPIs** that could be used as columns in your report, but which will rarely all be used at the same time and in the same report. The actual metrics used in a report may vary based on your implementation and the use of **report views**, as created by the Report Designer. See *Report Views on page 4* for more information.

> **Caution**
>
> Some UI elements, such as tooltips and labels, can be customized to fit your team's or company's needs. However, if any customizations are applied, especially for the values presented in the table below, this document does **not** reflect them. The person/entity that created the customized content has the sole responsibility for informing all the users of their system about the customizations. Contact your system administrator for more information on your customizations.

The following report values are used in the Queue Interaction Detail standard report:

Label	Tooltip
Agent ID	The unique identifying alphanumeric string of an agent handling interactions.
Campaign Class	The name of the campaign class the interaction was a part of. A campaign class is a group of similar or related marketing campaigns with the same overarching goal or purpose.

Label	Tooltip
Contact ID	Unique alphanumeric string identifier of a contact. If your integration supports it, the Contact ID will remain the same for every interaction that involves the same contact (e.g. same phone number or email address).
Delivery Notification Time	Time duration of the message used to inform the contact that they are about to be connected with the agent. Typically, this may include information such as the location or center the contact is at, or some instructions regarding the interaction.
Delivery Notification Timestamp	The starting timestamp of delivering the message used to inform the contact that they are about to be connected with the agent. Typically, this may include information such as the location or center the contact is at, or some instructions regarding the interaction.
Dialing Mode	The dialing mode of the target address. The dialing mode defines how a contact address is dialed by the system (predictive, preview, manual, etc).
End Timestamp	The timestamp of when the interaction was finished. This refers to the moment the interaction was resolved in the contact center, regardless of which channel the interaction was started through and what states and what the outcome of the interaction is. For example, this would refer to when a call is finished (e.g. the contact hangs up), a chat interaction is finalized (e.g. contact leaves the chat) etc.
Expected Wait Time	The time an interaction is expected to wait in a queue before being handled by an agent. This value is predicted based on your system's settings.
External Activity Time	The total time an interaction has spent in the 'External activity' state. This is a state where, having finished communication with a contact (and the wrapup), the agent works on relevant data entry in the organization's application. The 'External activity' state comes after the 'Online/Offline activity' and 'Wrapup' (if applicable) states.
First Self-service App.	The name of the first self-service application that handled the interaction (if applicable).
Handle Outcome	The result of the handling of the interaction. Examples include the contact abandoning the interaction, the agent handling it, etc. For interactions that were queued, this value is equal to the queueing outcome. For manual interactions (e.g. manual calls), this is equal to the Manual outcome.
Handle Outcome Detail	The result of the handling of the interaction with additional details about the result of the interaction handling.
Handle Outcome Timestamp	The timestamp of when the interaction was handled and assigned an outcome.
Handle Time	The total time the interaction has spent in the 'Handling' state. In this state, an agent is actively working on the interaction. The specific steps that are included in the 'Handling' state vary based on your implementation.
Hold Time	The total time the interaction has spent in the 'On hold' state. In this state, the contact is placed on hold in situations such as if the agent needs to look up a solution. If an interaction

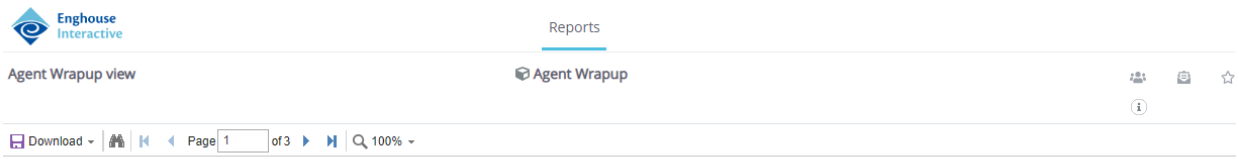
Label	Tooltip
	is placed on hold multiple times, all the hold times are added up.
Interaction ID	Unique alphanumeric string identifier of an interaction.
Interaction Type	The type, or direction, of the interaction. This refers to the way contacts, i.e. interactions were initiated and connected with the system. This includes outbound (started by an agent and aimed at a contact), inbound (started by a contact and aimed at the contact center), and internal (for internal contact center purposes) interactions.
Marketing Campaign	The name of the marketing campaign the interaction was a part of. A marketing campaign is a group of outbound activities with the goal of advertising a service or product to contacts.
Media Type	The type of media, or communication channel, used for an interaction. This refers to the tools that the contact and agent or contact center used to communicate. Media types include, but are not limited to, emails, chat, telephone etc. The available types may vary based on your implementation.
Offering Time	The total time an interaction has spent in the 'Offering' state. In this state, the interaction (inbound/outbound call, chat, email...) has been initiated, but the participants are not connected or actively communicating yet. For example, for incoming calls, this state's duration is equal to the ring time of the agent's phone (before they pick up). For outgoing calls, it is the ring time of the contact's phone. For chat, it is the time between the chat offer and the agent's first response; etc.
Offline Activity Time	The total time an interaction has spent in the 'Offline activity' state. This state includes interactions that are non-live, such as communicating with contacts via email. Note that if the same interaction is handled multiple times, each of the separate durations are counted individually, and are not summed up.
Online Activity Time	The total time an interaction has spent in the 'Online activity' state, in which an agent is actively involved in an interaction (for example, having a call or a chat conversation), including the time the interaction was on hold.
Processing Time	The total time interactions spent being processed in the system by an agent. This includes the Online activity time, wrapup time, offline activity time and external activity time.
Proposing Time	The total time interactions spent in the 'Proposing' state. This state is only available for automatic outbound calls in preview mode. In this state, the agent analyzes the contact before requesting the call.
Queue Arrival Reason	The reason why the interaction arrived to the queue.Examples include first arrivals, interactions that overflowed from another queue, interactions that were requeued by an agent etc. Possible queue arrival reasons may vary based on your implementation.
Queue Greeting Time	The total time the interaction has spent waiting in the queue while listening to the system's greeting message.
Queue ID	Unique alphanumeric string identifier of a queue.
Queue Mode	The name of the mode the queue is in. The queue mode describes what action the system

Label	Tooltip
	will take when the interaction arrives. Possible values may vary based on your implementation.
Queued Timestamp	The timestamp of when the interaction was placed in a queue.
Required Skills	List of skills that were required for a specific interaction (if applicable). For example, 'French' could be a required skill, where the agent is required to know the language to be able to successfully complete the interaction.
Required Skills with Level	List of skills that were required for a specific interaction (if applicable) with the requested minimum knowledge level of that skill. For example, French=5 (if, in this example, the knowledge levels for French are 1 to 5, where 5 is the highest).
Required Skills with Level and Status	List of skills that were required for a specific interaction (if applicable) with the requested knowledge level of that skill and the information of whether that skill has been released. If a skill has the '(released)' flag in this column, that means that an agent with the skill could not be found for an interaction and the skill was therefore no longer requested by the system. For example, if there is no agent available that matches a skill, after a certain wait time, the system automatically removes the skill to be able to assign the interaction to someone, as opposed for the contact just waiting until someone with that skill becomes available, if this is at all possible.
Service	The name of the service the interaction was a part of. A service is a grouping of queues and/or agents assigned to an application or following a specific, specialized workflow that defines how to handle interactions. Examples include a credit card service for a bank, a complaints service etc.
Source Address	The telephone number, email address or other source media identifier of the entity (contact or contact center / agent) that initiated the interaction. For example, for a call, the source address is the ANI.
Start Timestamp	The timestamp of when the interaction started. This refers to the moment the interaction was initiated and registered in the contact center, regardless of which channel the interaction was started through and what states and outcomes might occur later on. For example, this would refer to when an agent initiates a call (for outbound calls), when the customer sends in a chat request (for chat), when an email arrives in the contact center (for emails), or the contact center receives a call from a contact (for inbound calls).
Target Address	The telephone number, email address or other target media identifier of the entity (contact or contact center / agent) that received the interaction. For example, for a call, the target address is the DNIS.
Transfer Address	For interactions that were transferred or moved to an external resource (e.g. external call number, external email etc.), this is the address of the resource the interaction was moved to.
Transfer Timestamp	The timestamp of when the interaction was transferred.

Label	Tooltip
Wait Time	The total time the interaction spent waiting in a queue. If an interaction is requeued or moved to a different queue, the waiting time is reset. All wait time values are included in this calculation.
Wrapup Code	The wrapup code an agent assigns to an interaction during the 'Wrapup' state. Usually, this includes assigning relevant attributes to an interaction, such as 'Sale' or 'Already a customer' etc.
Wrapup Code and Value	The wrapup code an agent assigns to an interaction during the 'Wrapup' state, along with its value. Usually, this includes assigning relevant attributes to an interaction, such as 'Sale' or 'Already a customer' etc., and a corresponding boolean value (true/false), such as 'Sale=TRUE, Already a customer=FALSE'.
Wrapup Time	The total time the interaction has spent in the 'Wrapup' state. In this state, after finishing an interaction with a contact, the agents set up the wrapup code of the interaction during post-processing.
Wrapup Timestamp	The timestamp of when the interaction was placed into the wrapup state.

Agent Wrapup

This standard report helps you understand your agents' activities leading up to the wrapup of an interaction, particularly the metrics leading up to an interaction wrapup.



Agent Wrapup

	Wrapup Count	Wrapup Time	Avg Wrapup Time	Max Wrapup Time	% Wrapup Time	Avg Online Processing Time	Avg Waiting In Queue Time	Avg Offering Time
Total	171	67725	3280	9809	97.6%	235	35	16
AUCKLAND	10	11010	1376	9809	86.5%	1649	11	8
2021-11-22	8	11009	1376	9809	86.5%	206	9	8
2021-11-23	2	1	0	1	0.3%	162	11	4
CHICAGO	48	11578	854	3546	97.6%	1236	35	16
2021-09-01	5	67	13	26	24.8%	28	7	7
2021-09-02	5	3656	731	3546	97.6%	9	10	9
2021-09-03	9	222	24	196	14.7%	137	7	5
2021-09-07	2	1496	748	1421	87.3%	99	13	10
2021-09-13	0					12		
2021-10-13	2	578	289	518	88.2%	26		12
2021-10-14	1	79	79	79	55.6%	10		7
2021-10-29	2	13	6	13	8.8%	51		16
2021-11-09	3	627	209	370	36.1%	60	8	5

The asset description is divided into chapters as shown below. In these chapters, you can find out what the goal of the asset is, which filters you can use for your data, how to set up your asset, which graphical elements you can use in it (if they are available), and, finally, what each metric refers to.

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Objectives

The Agent Wrapup Standard Report was created to help contact center supervisors access data about agents' wrapup information in a given time, and to see if there is need for improvement regarding the kinds of interactions that most commonly occur.

Gaining insight into this data should help minimize the costs usually incurred with interactions, particularly those that are of lower priority.

The ability to access data on the categories of interactions that agents work with, and their performance in relation to said categories, should help optimize interaction handling by reviewing the totals the agents incurred for each wrapup status.

This report should be usable for multiple environments with little or no need for adaptation.

Report parameters

> **Note**
> While Reporting Standard Reports can be implemented to many environments with little to no change, it is important to note that some settings, options and results may still vary based on your individual implementation, data and system settings. In case you have any questions, refer to your Administrator or Reporting contact.

Filters

You can use multiple filters for this report. From a list of available filters, select one or more values for which you want to see the data. For non-datetime filters, you can select all available values, search for specific values, or clear all selected values from the dropdown list. Mandatory filters are marked with *, while non-mandatory filters can be left empty, i.e., unset, in which case this filter will not influence the report.

Depending on the filter, the following options may be available in the dropdown filters along with the data from your data source:

- **- Not defined -**: Choosing this option includes the fields in your data source that have no (null) data.
- **- Not assigned -**: Selecting this option includes cases where an agent was not assigned to an interaction, such as for self-service interactions.

The following filters can be used for this report:

- **Company**: From the list of available companies, choose the companies that interactions were assigned to, and for which you want to see data.
- **Contact Center**: Select the contact centers interactions were assigned to whose data you want to analyze in the report.
- **Agent Group**: From the dropdown list, select the agents groups whose data you want to use for the report.
- **Agent ID**: From a list of available agents, select one or more agents for which you want to see the report data. The list shows the agents available for this report in your system.

- **Media Type**: From the dropdown list, select the specific media type(s) you want to filter your interactions by. The specific available media types will very based on your systems, but examples include chat, email, phone etc.
- **Wrapup Code**: The wrapup code an agent assigns to an interaction during the 'Wrapup' state. Usually, this includes assigning relevant attributes to an interaction, such as 'Sale' or 'Already a customer' etc.
- **Wrapup Value**: Additional value assigned to the interaction's wrapup code. For example, if the wrapup code is a value such as 'Satisfaction level', the wrapup value could be '5'.
- **User Account Status**: From the dropdown list, select the status of the account agents are using to work in your system. The status can be one of the following:
  - **Enabled**: Agent can use the system as intended.
  - **Disabled**: Agent can no longer directly use the system, but the account is not deleted; all preexisting user-related data is preserved. The account can be enabled again to allow normal access.
  - **Deleted**: User is deleted from the system. All preexisting user-related data is preserved, but the account can no longer be enabled again.
- **Queue ID**: Choose the specific queue(s) whose data you want to use in the report.

Analysis groups

Analysis groups are data groups created within your database to facilitate use of reports and to group together various information based on certain shared criteria. This is not data collected through e.g. use of contact center software, and then stored in your database; it is a way of categorizing the collected data. You can filter by the following grouping options:

- **Analysis group set**: Choose a set of higher-level grouping within the database. This can include data from agent, queue, and other analysis groups, based on your implementation. This set groups together components from other available analysis groups, based on shared criteria.
- **Queue analysis group**: From the dropdown list, choose a grouping of queues within the database, based on shared criteria and intended to facilitate analysis within the report.
- **Agent analysis group**: From the list, select the needed grouping of agents within the database, based on shared criteria and used to facilitate analysis within the report. This value is independent of the 'Agent group' value, used in some reports.

Time selection

- **Date interval**: Choose the dates (interval) or relative time frame for the data. Switch between the Time frame and Interval mode by clicking the toggle just above the Date filter.
  - **from - to**: Enter the **from** and **to** dates for your filter manually or select them from the dropdown menu.
  - **Time frame**: Toggle the **Time frame** switch on to use the time frame mode. From the dropdown lists, choose the time unit (Days, Weeks, Months, Quarters or Years) and the relative time frame for your report.
- **Time interval (from and to)**: Choose the time interval in which the interactions you want to see started. From a list of full hours (24-hour format), choose the starting and ending hour to show your data in.

Settings

Time zone

With this setting, you can choose which time zone to view your data, filters and settings in. See *Report settings on page 10* for more information.

Duration display format

The **Duration display format** setting lets you define how you want to display the durations shown in your report. For more information, see this section.

Date display format

Using this setting, you can modify the way your date data is displayed in the report. See *Report settings on page 10* for more information.

Graphical elements

In this report, you can utilize various types of graphical elements to visualize your data. You can choose to use none of the graphical elements, one of them, or more of them at the same time. If you choose to use any of the graphical elements, they are placed at the top of the report and one under the other (if multiple are selected), as can be seen in the example in *Settings on page 10*.

The following graphical elements can be used with this report:

- **Column chart**: The bar chart in this standard report is titled **Wrapup Code Count by Date**. It shows the number of each wrapup codes for individual days in the time range defined in your report settings. This bar chart is stacked to show multiple wrapup keys for the same date in the same bar. The Y-Axis shows the number of interactions that have the included wrapup codes, while the X-Axis shows the individual days.

- **Bar chart**: The bar chart in this standard report is titled **Handle Time by Wrapup Code**. The Y-Axis lists the individual wrapup codes of handled interactions, and the X-Axis shows the total handling time (in seconds) for all interactions that have the wrapup code assigned to a bar. This bar chart reflects the total handling time for the listed wrapup codes, for the time range defined in your report settings.

- **Pie Chart**: The pie chart in this report is titled **Wrapup Code Count**. Each slice in this chart shows the number of interactions that were assigned a wrapup code, compared to the total number of interactions. The legend of the report shows the wrapup codes, the color assigned to each code, as well as the percentage a code has in the total number of interactions with a wrapup code. Additionally, in the pie chart, the absolute number of interactions per wrapup code is shown on each slice. This pie chart reflects the number of interactions per wrapup code for the time range defined in your report settings.

Show filters and settings sumup

Selecting this checkbox shows you a sumup of all report details. See more in *Report settings on page 10*.

Data grouping levels

Up to three data grouping levels can be set up for the parameters in this report. Only the first (lowest) level is mandatory; the other grouping levels are optional and can be left unset. If unset, these data grouping levels will not be shown in the report.

The following parameters can be selected from dropdown lists and used as the data grouping levels in this report:

- **Agent ID**: Agents' User ID without their full name.
- **Agent info**: More information on the agent, such as the agents' full (first and last) name.
- **Agent Group**: Name of the agents group.
- **Agent Analysis Group**: Grouping of agents used for analysis.
- **Agent Analysis Group Set**: Set of agent analysis groups based on the same criteria.
- **Company**: Name of the company.
- **Contact Center**: Name of the contact center.
- **Media type**: The channel used by the agent to handle the interaction; examples include telephone, emails, chat etc.
- **Queue (Queue ID)**: The ID of the queue without a description.
- **Queue (Queue Description)**: The (brief) description of the queue, if provided in your implementation.
- **Queue Analysis Group**: Grouping of queues used for analysis.
- **Queue Analysis Group Set**: Set of queue analysis groups based on the same criteria.
- **User Account Status**: The status of the account an agent is using to work in your system.
- **Year/Month/Day/Hour**: Time unit to be used as a grouping level.
- **Wrapup Code**: The key agents assigned to the interaction upon wrapup.
- **Wrapup Value**:

> **Note**
> The totals in each row of this are not calculated through the sums of the details shown in the report, but instead take advantage of the different rows available in your DWH. This means that depending on your settings, the totals in the rows of your report may be higher or lower than the sum of the individual detail values below them. For more information on how a specific total is calculated, contact your System Administrator.

Standard views

Standard views are report views available to users by default. See more about them in *Standard Views on page 6*.

This report includes the following standard views:

- **Agent Wrapup**: This view provides users with insight into the agent-wrapup-related metrics and activities.

Report values definition

Report values are part of the report itself and are shown once the report is generated. They are predefined and cannot be modified through the report settings and filters. In practical terms, report values are the columns shown in your report. Each metric shown in your report's columns is described below in more detail; explanations are also available on hover over the individual metrics in the report.

The list below shows **all the available metrics and KPIs** that could be used as columns in your report, but which will rarely all be used at the same time and in the same report. The actual metrics used in a report may vary based on your implementation and the use of **report views**, as created by the Report Designer. See *Report Views on page 4* for more information.

> **Caution**
>
> Some UI elements, such as tooltips and labels, can be customized to fit your team's or company's needs. However, if any customizations are applied, especially for the values presented in the table below, this document does **not** reflect them. The person/entity that created the customized content has the sole responsibility for informing all the users of their system about the customizations. Contact your system administrator for more information on your customizations.

The following report values are used in the Agent Wrapup standard report:

Label	Tooltip
% Delivery Notification Time	The percentage of time an interaction was in the 'Delivery Notification' state, compared to the total time agents spent handling interactions.
% Expected Wait Time	The percentage of time an interaction is expected to wait in a queue before being handled by an agent, compared to the total time agents spent handling interactions.
% External Activity	The percentage of time agents spent in the 'External Activity' state, compared to the total time they were logged in (Logged in time), including breaks.
% Hold	The percentage of time that agents spent in the 'On hold' state, compared to the total time they were logged in (Logged in time), including breaks.
% Offering	The percentage of time agents spent in the 'Offering' state, compared to the total time they were logged in (Logged in time), including breaks.
% Offline Activity	The percentage of time agents spent in the 'Offline Activity' state, compared to the total time they were logged in (Logged in time), including breaks.
% Online Activity	The percentage of time agents spent in the 'Online activity' state, compared to the total time they were logged in (Logged in time), including breaks.
% Proposing	The percentage of time agents spent in the 'Proposing' state, compared to the total time they were logged in (Logged in time), including breaks.
% Queue Greeting	The percentage of time an interaction has spent in the 'Queue greeting time' state, compared to the total time agents spent handling interactions.

Label	Tooltip
Time	
% Wait Time	The time an interaction spends waiting in a queue, compared to the total time agents spent handling interactions.
% Wrapup Time	The percentage of time that agents spent in the 'Wrapup' state, compared to the total time agents spent handling interactions.
Avg Delivery Notification Time	The average duration of the message used to inform the contact that they are about to be connected with the agent. Typically, this may include information such as the location or center the contact is at, or some instructions regarding the interaction.
Avg Expected Wait Time	The average time an interaction is expected to wait in a queue before being handled by an agent. This value is predicted based on your system's settings.
Avg External Activity Time	The average time an agent has spent in the 'External activity' state. This is a state where, having finished communication with a contact (and the wrapup), the agent works on relevant data entry in the organization's application. The 'External activity' state comes after the 'Online/Offline activity' and 'Wrapup' (if applicable) states. This takes into account all queueings of interactions that were in this state.
Avg Hold Time	The average time agents have had an interaction put on hold.
Avg Offering Time	The average time agents spent in the 'Offering' state. In this state, the interaction (inbound/outbound call, chat, email...) has been initiated, but the participants are not connected or actively communicating yet. Once they are connected, the state changes from 'Offering' to 'Online/Offline activity' (depending on interaction type). For example, for incoming calls, this state's duration is equal to the ring time of the agent's phone (before they pick up). For outgoing calls, it is the time until the call gets connected. For chat, it is the time between the chat offer and the agent's first response; etc.
Avg Offline Activity Time	The average time agents spent in the 'Offline activity' state. This state includes agents' activities regarding non-live interactions, such as communication via email.
Avg Online Activity Time	The average time agents have spent in the 'Online activity' state. In this state, agents are actively working on a live interaction (such as participating in a call or having a conversation via chat). This takes into account all queueings of interactions that were in this state.
Avg Proposing Time	The average time agents spent in the 'Proposing' state. This state is only available for automatic outbound calls in preview mode. In this state, the agent analyzes the contact before requesting the call.
Avg Queue Greeting Time	The average time the interaction has spent waiting in the queue while listening to the system's greeting message.
Avg Wait Time	The average time an interaction spends waiting in a queue. The calculation is made based on all waiting times of all queued interactions (all Queueings), regardless of the outcome. If an interaction is moved from one queue to another or requeued, the waiting time is reset; all

Label	Tooltip
	such restarted waiting times are also included in this calculation.
Avg Wrapup Time	The average time agents have spent in the 'Wrapup' state. In this state, agents perform offline activities needed to complete the interaction after finishing communication with the contact.
Delivery Notification Time	Time duration of the message used to inform the contact that they are about to be connected with the agent. Typically, this may include information such as the location or center the contact is at, or some instructions regarding the interaction.
Expected Wait Time	The time an interaction is expected to wait in a queue before being handled by an agent. This value is predicted based on your system's settings.
External Activity Time	The total time agents spent in the 'External activity' state. This is a state where, having finished communication with the contact, the agent works on relevant data entry outside the contact center's application. The 'External activity' state comes after the 'Online/Offline activity' states.
Hold Time	The total time agents have had an interaction put on hold.
Max Delivery Notification Time	The maximum duration of the message used to inform the contact that they are about to be connected with the agent. Typically, this may include information such as the location or center the contact is at, or some instructions regarding the interaction.
Max Expected Wait Time	The maximum time an interaction is expected to wait in a queue before being handled by an agent. This value is predicted based on your system's settings.
Max External Activity Time	The maximum time an interaction has spent in the 'External activity' state. This is a state where, having finished communication with a contact (and the wrapup), the agent works on relevant data entry in the organization's (external) application. The 'External activity' state comes after the 'Online/Offline activity' and 'Wrapup' (if applicable) states.The displayed value is the longest single duration an interaction has spent in this state out of all queueings of interactions that were in this state. Note that if the same interaction is handled multiple times, each of the separate durations are counted individually, and are not summed up.
Max Hold Time	The maximum time agents have had an interaction put on hold.
Max Offering Time	The maximum time agents spent in the 'Offering' state. In this state, the interaction (inbound/outbound call, chat, email...) has been initiated, but the participants are not connected or actively communicating yet. Once they are connected, the state changes from 'Offering' to 'Online/Offline activity' (depending on interaction type). For example, for incoming calls, this state's duration is equal to the ring time of the agent's phone (before they pick up). For outgoing calls, it is the time until the call gets connected. For chat, it is the time between the chat offer and the agent's first response; etc.
Max Offline Activity Time	The maximum time agents spent in the 'Offline activity' state. This state includes agents' activities regarding non-live interactions, such as communication via email.
Max Online	The maximum time agents have spent in the 'Online activity' state.In this state, agents are

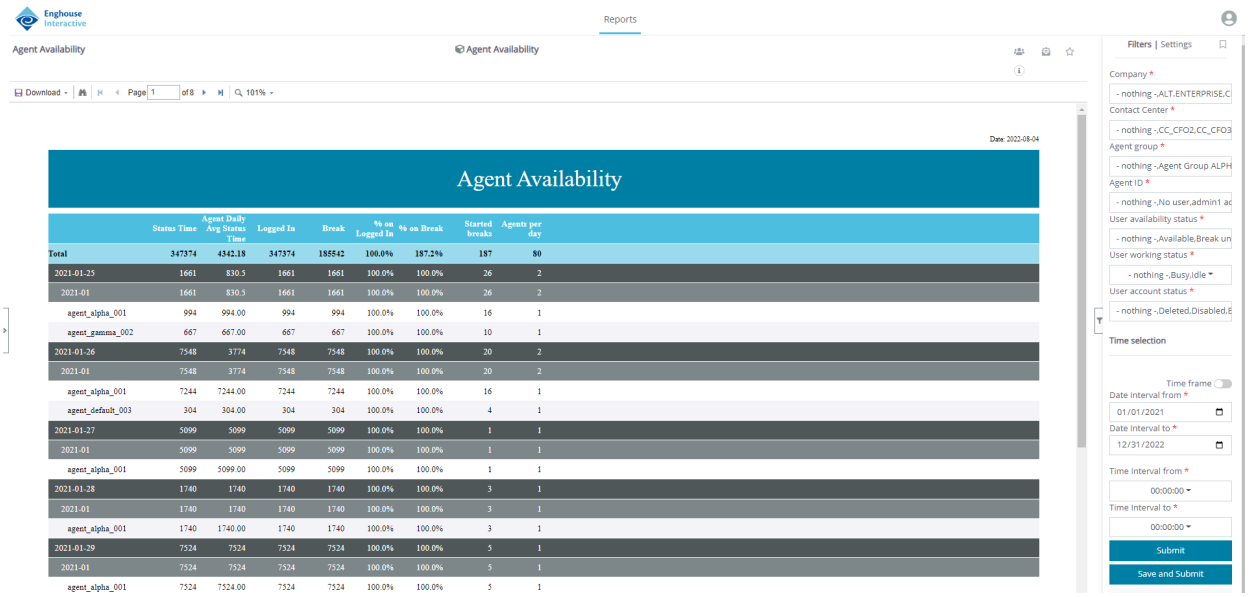
Label	Tooltip
Activity Time	actively working on a live interaction (such as participating in a call or having a conversation via chat). The displayed value is the longest single duration an interaction has spent in this state out of all queueings of interactions that were in this state. Note that if the same interaction is handled multiple times, each of the separate durations are counted individually, and are not summed up.
Max Proposing Time	The maximum time agents spent in the 'Proposing' state. This state is only available for automatic outbound calls in preview mode. In this state, the agent analyzes the contact before requesting the call.
Max Queue Greeting Time	The maximum time the interaction has spent waiting in the queue while listening to the system's greeting message.
Max Wait Time	The maximum time an interaction spends waiting in a queue. The calculation is made based on all waiting times of all queued interactions (all Queueings), regardless of the outcome. If an interaction is moved from one queue to another or requeued, the waiting time is reset; all such restarted waiting times are also included in this calculation.
Max Wrapup Time	The maximum time agents have spent in the 'Wrapup' state. In this state, agents perform offline activities needed to complete the interaction after finishing communication with the contact.
Offering Time	The total time agents spent in the 'Offering' state. In this state, the interaction (inbound/outbound call, chat, email...) has been initiated, but the participants are not connected or actively communicating yet. Once they are connected, the state changes from 'Offering' to 'Online/Offline activity' (depending on interaction type). For example, for incoming calls, this state's duration is equal to the ring time of the agent's phone (before they pick up). For outgoing calls, it is the time until the call gets connected. For chat, it is the time between the chat offer and the agent's first response; etc.
Offline Activity Time	The total time agents spent in the 'Offline activity' state. This state includes agents' activities regarding non-live interactions, such as communication via email.
Online Activity Time	The total time agents have spent in the 'Online activity' state, in which an agent is actively involved in an interaction (for example, having a call or a chat conversation).
Proposing Time	The total time agents spent in the 'Proposing' state. This state is only available for automatic outbound calls in preview mode. In this state, the agent analyzes the contact before requesting the call.
Queue Greeting Time	The total time the interaction has spent waiting in the queue while listening to the system's greeting message.
Wait Time	The total time the interaction spent waiting in a queue. If an interaction is requeued or moved to a different queue, the waiting time is reset. All wait time values are included in this calculation.
Wrapup Count	The number of times agents entered the 'Wrapup' state.

Label	Tooltip
Wrapup Time	The total time agents have spent in the 'Wrapup' state. In this state, agents perform offline activities needed to complete the interaction after finishing communication with the contact.

-

Agent Availability

This standard report helps you understand your agents' activities, especially in the context of their availability times within your system.



The asset description is divided into chapters as shown below. In these chapters, you can find out what the goal of the asset is, which filters you can use for your data, how to set up your asset, which graphical elements you can use in it (if they are available), and, finally, what each metric refers to.

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Objectives

The Agent Availability Standard Report was created to help contact center supervisors access data about agents' availability and working time information in a given time, and to see if there is need for improvement regarding the way the availability of agents is distributed across the various agent states.

The ability to access data on the availability of agents and how their work time is distributed in states should help optimize the way agents work in a broad sense.

This report should be usable for multiple environments with little or no need for adaptation.

Report parameters

> **Note**
> While Reporting Standard Reports can be implemented to many environments with little to no change, it is important to note that some settings, options and results may still vary based on your individual implementation, data and system settings. In case you have any questions, refer to your Administrator or Reporting contact.

Filters

You can use multiple filters for this report. From a list of available filters, select one or more values for which you want to see the data. For non-datetime filters, you can select all available values, search for specific values, or clear all selected values from the dropdown list. Mandatory filters are marked with *, while non-mandatory filters can be left empty, i.e., unset, in which case this filter will not influence the report.

Depending on the filter, the following options may be available in the dropdown filters along with the data from your data source:

- **- Not defined -**: Choosing this option includes the fields in your data source that have no (null) data.
- **- Not assigned -**: Selecting this option includes cases where an agent was not assigned to an interaction, such as for self-service interactions.

The following filters can be used for this report:

- **Company**: From the list of available companies, choose the companies that interactions were assigned to, and for which you want to see data.
- **Contact Center**: Select the contact centers interactions were assigned to whose data you want to analyze in the report.
- **Media type**: From the dropdown list, select the specific media type(s) you want to filter your interactions by.
- **Agent group**: From the dropdown list, select the agents groups whose data you want to use for the report.
- **Agent ID**: From a list of available agents, select one or more agents for which you want to see the report data. The list shows the agents available for this report in your system.
- **User availability status**: Select the working status of the agents from the following list:
  - **Available**: The agent is available for work.
  - **Unavailable - Break**: The agent is unavailable for work due to being on a break.
  - **Logged out**: The agent is unavailable for work due to being logged out of your system.
  - **Unavailable - Self-Managed Activity**: The agent is unavailable for work due to working on a self-managed activity (such as attending a staff meeting).

- **System unavailable**: The agent is unavailable for work due to the system not being available to them, e.g. because there is no internet connection.

- **User availability status detail**: Choose one or more of the additional status details that provide information about an agent's status, for example, why they are unavailable.
- **User working status**: From the following, choose the agent availability statuses for which you want to see data in the report:
  - **Busy**: The agent is working on an activity.
  - **Idle**: The agent is currently not working on an activity and is waiting to be assigned one.
- **User working status detail**: Select one of more of the additional status details that provide information about a user's status, such as for example why they are busy.
- **User Account Status**: From the dropdown list, select the current status of the account agents used for their work in your system. The status can be one of the following:
  - **Enabled**: Agent can use the system as intended.
  - **Disabled**: Agent can no longer directly use the system, but the account is not deleted; all preexisting user-related data is preserved. The account can be enabled again to allow normal access.
  - **Deleted**: User is deleted from the system. All preexisting user-related data is preserved, but the account can no longer be enabled again.

Time selection

- **Date interval**: Choose the dates (interval) or relative time frame for the data. Switch between the Time frame and Interval mode by clicking the toggle just above the Date filter.
  - **from - to**: Enter the **from** and **to** dates for your filter manually or select them from the dropdown menu.
  - **Time frame**: Toggle the **Time frame** switch on to use the time frame mode. From the dropdown lists, choose the time unit (Days, Weeks, Months, Quarters or Years) and the relative time frame for your report.
- **Time interval (from and to)**: Choose the time interval in which the interactions you want to see started. From a list of full hours (24-hour format), choose the starting and ending hour to show your data in.

Analysis groups

Analysis groups are data groups created within your database to facilitate use of reports and to group together various information based on certain shared criteria. This is not data collected through e.g. use of contact center software, and then stored in your database; it is a way of categorizing the collected data. You can filter by the following grouping options:

- **Analysis group set**: Choose a set of higher-level grouping within the database. This can include data from agent, queue, and other analysis groups, based on your implementation. This set groups together components from other available analysis groups, based on shared criteria.
- **Agent analysis group**: From the list, select the needed grouping of agents within the database, based on shared criteria and used to facilitate analysis within the report. This value is independent of the 'Agent group' value, used in some reports.

Settings

Time zone

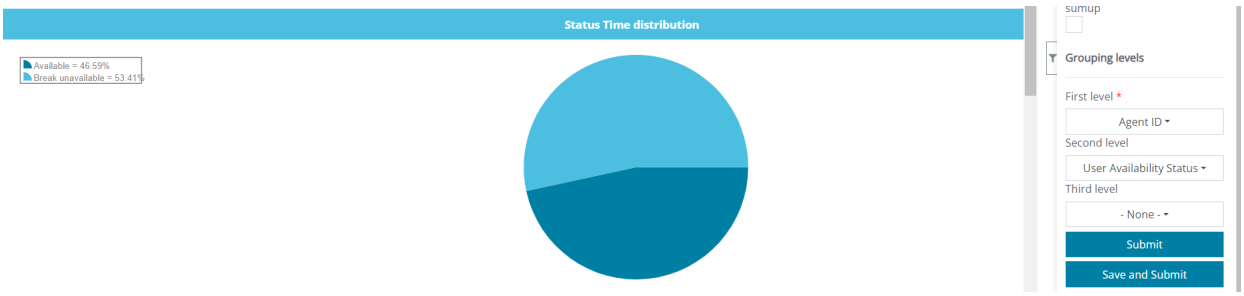
With this setting, you can choose which time zone to view your data, filters and settings in. See *Report settings on page 10* for more information.

Graphical elements

In this report, you can utilize various types of graphical elements to visualize your data. You can choose to use none of the graphical elements, one of them, or more of them at the same time. If you choose to use any of the graphical elements, they are placed at the top of the report and one under the other (if multiple are selected), as can be seen in the example in *Settings on page 10*.

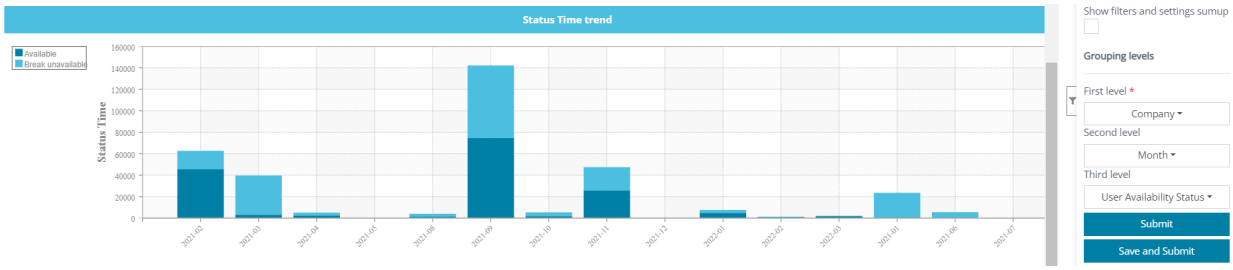
The following graphical elements can be used with this report:

- **Pie chart**: The pie chart in this standard report is titled **Status Time distribution**. It shows the distribution of status time(s) across the highest data grouping level you set up in your report settings. Overall:
  - Each pie slice represents one individual value of the highest data grouping level you set up in the report settings.
  - Only one data grouping level is used as the basis for this report. If multiple data grouping levels are set up, only the highest is used.
  - A legend is available on the left side of the graphical element which shows the individual values of the individual slices.
  - You can hover over each pie slice to see the absolute value of the slice.
  - In the example below, you can see this pie chart and the data grouping level settings used to generate it. Even though multiple data grouping levels are set up, only the highest one is used for this chart. As "User Availability Status" is the highest set-up data grouping level, only that is used to generate this chart.



- **Column chart**: The (stacked) column chart in this standard report is titled **Status Time trend**, and it shows the status time per each value of the highest or second-highest set-up data grouping level, depending on the settings. Hover over each bar to see the label and/or value of that bar. Overall:
  - This chart utilizes up to two data grouping levels. If one is used, there is no stacking in bars; if two (or more) are set-up, bars are stacked.

- The X-Axis shows the individual values of the only set-up data grouping level, if one grouping level is used, or the second-highest set-up data grouping level, if two or more grouping levels are used.
- If two or more data grouping levels are set-up, the bars are stacked by the highest of them.
- The Y-Axis always shows the status time in seconds. Note that any changes in the duration display format are not applied to the Y-Axis, but are shown on hover for each column.
- In the example below, you can see the stacked column chart and the data grouping level settings used to generate it. In the settings, you can see that all three data grouping levels are set-up. However, only the highest two are used: "Month" as the second grouping level (and second-highest, in this case), used as the X-Axis value, showing one bar for each month, and "User Availability Status" as the third grouping level (and highest, in this case), used as the criteria to stack the individual bars.



- **Bubble Chart**: The bubble chart in this report is titled **Status Time comparison with Logged In Time**. It shows the relationship of the logged in time and the status time, as well as the number of available agents, based on the highest data grouping level you define and other report settings. The values of the report are defined as follows:
  - The color of the bubble reflects the individual values of the highest set-up data grouping level. These values are also shown in the report legend to the left of the chart.
  - The bubble size shows the number of agents per day, as shown in the "Agents per day" column for each value of the highest set-up data grouping level.
  - The Y-Axis always shows the status time in seconds (regardless of the Duration display format setting). This data is taken from the "Status Time" column for each value of the highest set-up data grouping level. This metric is indicated in red in the screenshot below.
  - The X-Axis always shows the logged in time in seconds (regardless of the Duration display format setting). This data is taken from the "Logged In" column for each value of the highest set-up data grouping level. This metric is indicated in yellow in the screenshot below.
  - In the example below, you can see the report, the bubble chart, and the settings used to generate it:

Duration display format

The **Duration display format** setting lets you define how you want to display the durations shown in your report. For more information, see this section.

Date display format

Using this setting, you can modify the way your date data is displayed in the report. See *Report settings on page 10* for more information.

Show filters and settings sumup

Selecting this checkbox shows you a sumup of all report details. See more in *Report settings on page 10*.

Data grouping levels

Up to three data grouping levels can be set up for the parameters in this report. Only the first (lowest) level is mandatory; the other grouping levels are optional and can be left unset. If unset, these data grouping levels will not be shown in the report.

The following parameters can be selected from dropdown lists and used as the data grouping levels in this report:

- **Agent Group**: Name of the agents group.
- **Agent Analysis Group**: Grouping of agents used for analysis.
- **Agent Analysis Group Set**: Set of agent analysis groups based on the same criteria.
- **Agent ID**: Agents' UserID without their full name.
- **Agent info**: More information on the agent, such as the agents' full (first and last) name.
- **Company**: Name of the company.

- **Contact Center**: Name of the contact center.
- **Media type**: The channel used by the agent to handle the interaction; examples include telephone, emails, chat etc.
- **Year/Month/Day/Hour**: Time unit to be used as a grouping level.
- **User account status**: The status of the account an agent is using to work in your system.
- **User availability status**: Brief description of whether the agent is available for work.
- **User availability status detail**: More detailed description of the user availability status (if available in your implementation).
- **User working status**: Label for the current agent working status (such as on a break or available for work).
- **User working status detail**: More detailed description of the user working status (if available in your implementation).

> **Note**
> The totals in each row of this are not calculated through the sums of the details shown in the report, but instead take advantage of the different rows available in your DWH. This means that depending on your settings, the totals in the rows of your report may be higher or lower than the sum of the individual detail values below them. For more information on how a specific total is calculated, contact your System Administrator.

Standard views

Standard views are report views available to users by default. See more about them in *Standard Views on page 6*.

This report includes the following standard views:

- **Agent Availability**: This view shows you a summary of the agents' availability and working statuses, including more detailed data on agents' status and break times.
- **Agent Breaks**: This view provides more information on the agents' break times.

Report values definition

Report values are part of the report itself and are shown once the report is generated. They are predefined and cannot be modified through the report settings and filters. In practical terms, report values are the columns shown in your report. Each metric shown in your report's columns is described below in more detail; explanations are also available on hover over the individual metrics in the report.

The list below shows **all the available metrics and KPIs** that could be used as columns in your report, but which will rarely all be used at the same time and in the same report. The actual metrics used in a report may vary based on your implementation and the use of **report views**, as created by the Report Designer. See *Report Views on page 4* for more information.

Caution

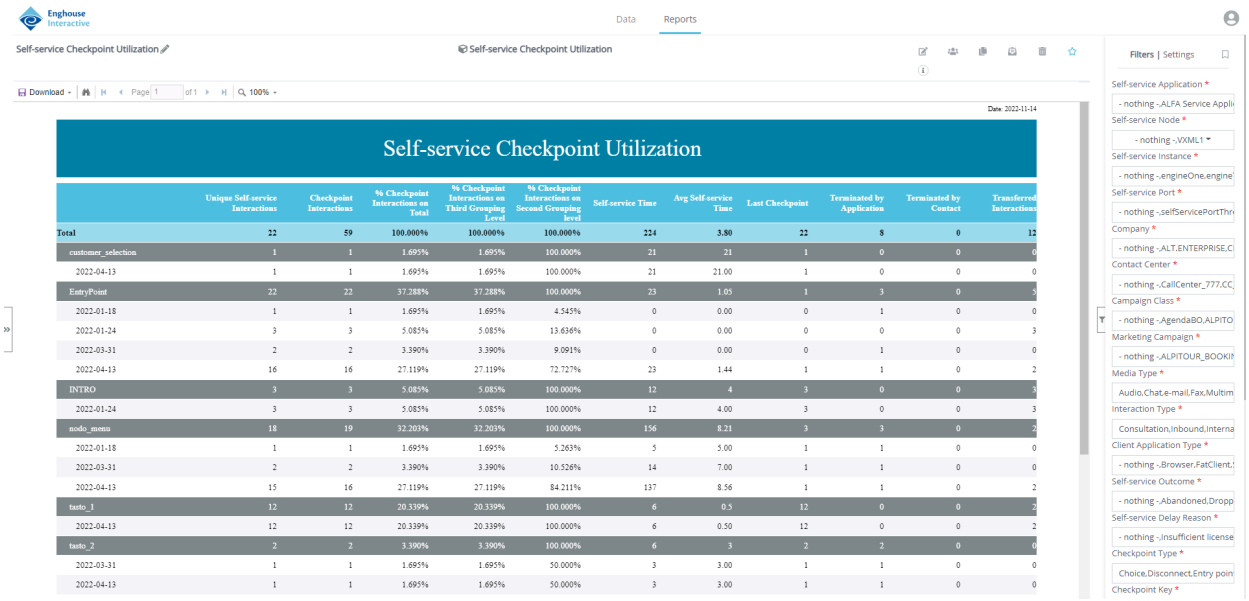
Some UI elements, such as tooltips and labels, can be customized to fit your team's or company's needs. However, if any customizations are applied, especially for the values presented in the table below, this document does **not** reflect them. The person/entity that created the customized content has the sole responsibility for informing all the users of their system about the customizations. Contact your system administrator for more information on your customizations.

The following report values are used in the Agent Availability standard report:

Label	Tooltip
Status Time	The time agents spent in the selected availability status and/or working state.
Agent Daily Avg Status Time	The daily average time the agent spends in the selected availability status and/or working state.
Logged In	The total time agents have spent logged in to the system. This includes all agent states in the system (including breaks) and their durations. In this report, this metric is not affected by working state and availability status filters.
Break	The total amount of time all agents have spent on breaks (that is, in the 'Break' state), added up. During this time, agents were unavailable to handle their interactions or do other work. In this report, this metric is not affected by working state and availability status filters.
% Status Time of Total	The percentage of the 'Status time' of all agents, compared to the total time they spent working in the syst
% Status Time of Logged In Time	The percentage of the 'Status time' of all agents, compared to the total time they were logged in ('Logged in time').
% Status Time of Break	The percentage of the 'Status time' of all agents, compared to the total time they were logged in ('Logged in time').
Started Breaks	The number of breaks started by agents. This is only counted in the time interval the break was started in. In other words, if you choose a time interval in the report settings where the break was still ongoing, but the starting moment was in a different time interval, this break will not be included in this metric.
Agents per Day	The distinct numbers of agents that logged into the system, per day. If an agent logs in multiple times, the multiple login instances are not counted separately, but as one login. Depending on which value you set up as your data grouping levels, this value may refer to different things: if any of the values related to individual agents, such as Agent ID, are a data grouping level, that grouping level will show in this column the number of days the agent worked. For other values used as a data grouping level, such as the day or month, this column will show the number of distinct agents that worked that day or month, i.e. in relation to the value you set up.

Self-service Checkpoint Utilization

This standard report helps you understand how the self-service checkpoints in your contact center are being engaged utilized by contacts.



The asset description is divided into chapters as shown below. In these chapters, you can find out what the goal of the asset is, which filters you can use for your data, how to set up your asset, which graphical elements you can use in it (if they are available), and, finally, what each metric refers to.

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Objectives

The Self-service Checkpoint Utilization Standard Report was created to analyze the performance of self-service applications, more specifically, in the context of the self-service checkpoints. Having the relevant data allows you to maximize the capacity of the self-service applications to satisfy the needs of contacts without having to involve agents directly, thereby also optimizing resource usage.

With this report, you can also identify possible areas for improvement with the self-service checkpoints, particularly when it comes to long waiting times, high abandon rates and multiple hits on the same checkpoint.

In short, this report provides you insight into how self-service checkpoints are used, giving you the most important KPIs per self-service application, with the focus primarily on its checkpoints.

Report parameters

> **Note**
> While Reporting Standard Reports can be implemented to many environments with little to no change, it is important to note that some settings, options and results may still vary based on your individual implementation, data and system settings. In case you have any questions, refer to your Administrator or Reporting contact.

Filters

You can use multiple filters for this report. From a list of available filters, select one or more values for which you want to see the data. For non-datetime filters, you can select all available values, search for specific values, or clear all selected values from the dropdown list. Mandatory filters are marked with *, while non-mandatory filters can be left empty, i.e., unset, in which case this filter will not influence the report.

Depending on the filter, the following options may be available in the dropdown filters along with the data from your data source:

- **- Not defined -**: Choosing this option includes the fields in your data source that have no (null) data.
- **- Not assigned -**: Selecting this option includes cases where an agent was not assigned to an interaction, such as for self-service interactions.

The following filters can be used for this report:

- **Company**: From the list of available companies, choose the companies that interactions were assigned to, and for which you want to see data.
- **Contact center**: Select the contact centers interactions were assigned to whose data you want to analyze in the report.
- **Campaign class**: Choose the names of the campaign classes the interaction you want to analyze were a part of. A campaign class is a group of similar or related marketing campaigns with the same overarching goal or purpose.
- **Marketing campaign**: Select the names of the marketing campaigns that the interactions you want to analyze were a part of. A marketing campaign is a group of outbound activities with the goal of advertising a service or product to contacts.
- **Media type**: From the dropdown list, select the specific media type(s) you want to filter your interactions by.
- **Interaction type**: Choose the type of interaction you want to see the data for. You can select one, multiple, or all options. The interaction types are as follows:
  - **Consultation**: Interactions done within the call center where agents consult with other agents, supervisors etc. to resolve an issue.

- **Outbound**: Interactions initiated by an agent and directed to a contact through any available media types.
- **Inbound**: Interactions initiated by the contact and aimed at the contact center through any available media types.
- **Internal**: Interactions initiated for internal contact center purposes (and not directed toward contacts).

- **Client Application Type**: From the dropdown list, choose the type of client used by the end user (contact). For interactions with self-service activity, this is typically the navigator client type (smartphone OS, browser, etc.).

Self-service

- **Self-service application**: From the dropdown menu, choose the self-service applications used with interactions whose data you want to analyze.
- **Self-service node**: Choose the server of self-service engine that runs the self-service applications handling interactions.
- **Self-service instance**: Select the instances of the self-service engine that runs the self-service applications that are handling interactions.
- **Self-service port**: Choose the relevant communication channel (port) in the self-service instance used for handling interactions.
- **Self-service outcome**: Select the final outcome of the self-service interaction with the application.
- **Self-service delay reason**: Choose the relevant reason why interactions waited to interact with a self-service application.
- **Checkpoint type**: From the dropdown list, select the needed classification of the self-service checkpoints.
- **Checkpoint key**: Choose the relevant alphanumeric string identifier of a self-service checkpoint.
- **Checkpoint detail**: Select the needed second-level detail of the self-service checkpoint.
- **Checkpoint value**: Enter the value of the self-service checkpoint field; it can be empty if no data has been collected on the checkpoint. Note that the way checkpoint value data is collected varies greatly depending on the implementation.

Time selection

- **Date interval**: Choose the dates (interval) or relative time frame for the data. Switch between the Time frame and Interval mode by clicking the toggle just above the Date filter.
  - **from - to**: Enter the **from** and **to** dates for your filter manually or select them from the dropdown menu.
  - **Time frame**: Toggle the **Time frame** switch on to use the time frame mode. From the dropdown lists, choose the time unit (Days, Weeks, Months, Quarters or Years) and the relative time frame for your report.
- **Time interval (from and to)**: Choose the time interval in which the interactions you want to see started. From a list of full hours (24-hour format), choose the starting and ending hour to show your data in.

Settings

Time zone

With this setting, you can choose which time zone to view your data, filters and settings in. See *Report settings on page 10* for more information.

Duration display format

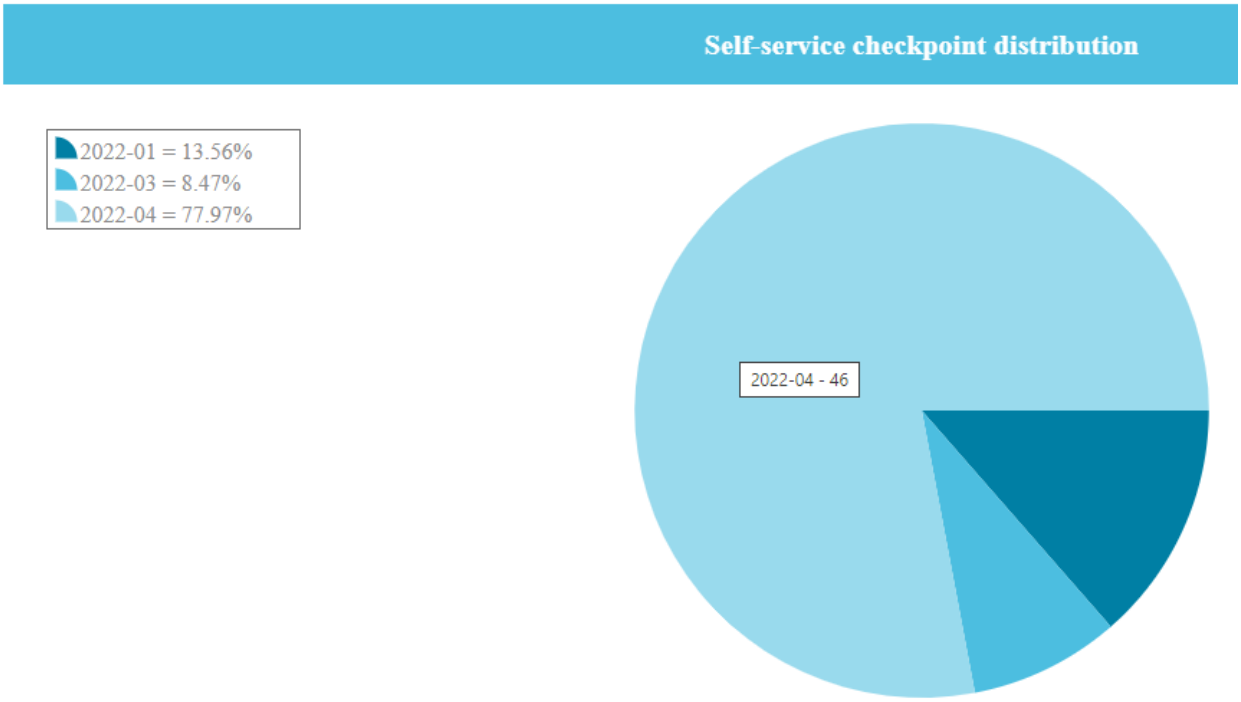
The **Duration display format** setting lets you define how you want to display the durations shown in your report. For more information, see this section.

Graphical elements

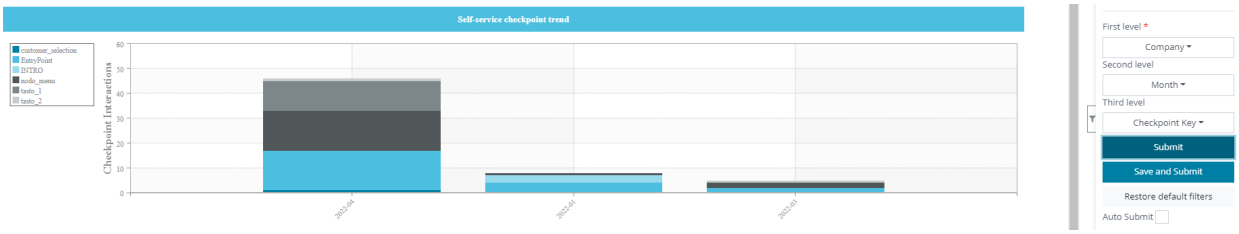
In this report, you can utilize various types of graphical elements to visualize your data. You can choose to use none of the graphical elements, one of them, or more of them at the same time. If you choose to use any of the graphical elements, they are placed at the top of the report and one under the other (if multiple are selected), as can be seen in the example in *Settings on page 10*.

The following graphical elements can be used with this report:

- **Pie chart**: This pie chart, titled "**Self-service checkpoint distribution**", shows you the percentage distribution of the number of interactions that have entered a self-service checkpoint (any available self-service checkpoint), i.e., the Checkpoint Interactions, based on the highest data grouping level you set up in the report, the time range you enter and other filters and settings. Hover over each pie slice to see the absolute value of the slice.
  - For example, if " Self-service Application" is the highest set-up grouping level in your report (regardless of what the lower ones are, if there are any), you will see the percentage distribution of the number of times interactions have entered a self-service checkpoint for each self-service application (one pie slice per application), compared to the total number of interactions that have entered any available self-service checkpoint.
  - Similarly, if "Month" is the highest set-up grouping level, you will see the percentage distribution of the number of times interactions have entered a self-service checkpoint for each individual month (one pie slice per month), compared to the total number of interactions that have entered any available self-service checkpoint.



- **Column chart**: The stacked column chart titled "**Self-service checkpoint trend**" shows the number of times that interactions entered a self-service checkpoint (Y-Axis), distributed by the only or second-highest data grouping level (X-Axis) that you set up in your report settings. If you set up more than one data grouping level, the highest is used to stack the data on each bar. Overall:
  - The Y-Axis always shows the number of interactions.
  - The X-Axis varies depending on what metric you set up as the second-highest (or only) data grouping level in your report.
  - The bars can be stacked, and the criteria by which it is stacked is the highest data grouping level. This is only applicable if two or more data grouping levels are used in the report.
  - The example below shows the bar chart and the grouping levels used to set it up. Even though the first level uses the "Company" value, this is not shown in the graphical element, as it only takes into account the two highest set-up levels, which here are "Month" for the second level (shown on the X-Axis as the individual columns) and "Checkpoint Key" for the third level (shown in the stacking of the columns and the chart legend).



- **Bubble Chart**: The bubble chart in this report is titled **Self-service checkpoint comparison with unique self-service interactions**. It shows the relationship of the total number of interactions that have entered a checkpoint (including interactions that have entered multiple checkpoints, or the same checkpoint multiple times) and the total number of unique interactions that have entered the self-service application. This comparison is further enhanced with the highest data grouping level you define and other report settings. In other words:
  - The bubble size represents the absolute time that the individual values of the highest set-up data grouping level have spent in self-service checkpoints.
  - The color of the bubble reflects the individual values of the highest set-up data grouping level. These values are also shown in the report legend.
  - The Y-Axis always shows the number of self-service checkpoint interactions.
  - The X-Axis always shows the number of unique interactions that have entered a self-service application.

Show filters and settings sumup

Selecting this checkbox shows you a sumup of all report details. See more in *Report settings on page 10*.

Date display format

Using this setting, you can modify the way your date data is displayed in the report. See *Report settings on page 10* for more information.

Data grouping levels

Up to three data grouping levels can be set up for the parameters in this report. Only the first (lowest) level is mandatory; the other grouping levels are optional and can be left unset. If unset, these data grouping levels will not be shown in the report.

The following parameters can be selected from dropdown lists and used as the data grouping levels in this report:

- **Company**: Name of the company.
- **Contact Center**: Name of the contact center.
- **Campaign Class**: The name of the campaign class. A campaign class is a group of similar or related marketing campaigns with the same overarching goal or purpose.
- **Marketing Campaign**: The name of the marketing campaign. A marketing campaign is a group of outbound activities with the goal of advertising a service or product to contacts.
- **Checkpoint Key**: Alphanumeric string identifier of a self-service checkpoint.
- **Checkpoint Detail**: Second-level detail of the self-service checkpoint.
- **Checkpoint Type**: Classification of the self-service checkpoint.
- **Checkpoint Value**: The value of the self-service checkpoint field. Note that the way checkpoint value data is collected varies greatly depending on the implementation.
- **Interaction type**: The "direction" of the interaction.
- **Media type**: The channel used by the agent to handle the interaction; examples include telephone, emails, chat etc.

- **Client Application Type**: Type of client used by the end user (contact).
- **Self-service Application**: Self-service applications used for interactions.
- **Self-service Delay Reason**: Reason why interactions waited to interact with a self-service application.
- **Self-service Instance**: Instances of the self-service engine that runs the self-service applications that are handling interactions.
- **Self-service Node**:Server of the self-service engine that runs the self-service applications handling interactions.
- **Self-service Outcome**: Final outcome of the self-service interaction with the application.
- **Self-service Port**: Communication channel (port) in the self-service instance used for handling interactions.
- **Year/Month/Day/Hour**: Time unit to be used as a grouping level.

> **Note**
> The totals in each row of this are not only calculated using the data of the details shown in the report, but instead take advantage of the different rows available in your DWH. This means that depending on your settings, the totals in the rows of your report may be higher or lower than the expected value when taking into account only the individual values shown in the report. For more information on how a specific total is calculated, contact your Administrator or Designer.

Report values definition

Report values are part of the report itself and are shown once the report is generated. They are predefined and cannot be modified through the report settings and filters. In practical terms, report values are the columns shown in your report. Each metric shown in your report's columns is described below in more detail; explanations are also available on hover over the individual metrics in the report.

The list below shows **all the available metrics and KPIs** that could be used as columns in your report, but which will rarely all be used at the same time and in the same report. The actual metrics used in a report may vary based on your implementation and the use of **report views**, as created by the Report Designer. See *Report Views on page 4* for more information.

> **Caution**
> Some UI elements, such as tooltips and labels, can be customized to fit your team's or company's needs. However, if any customizations are applied, especially for the values presented in the table below, this document does **not** reflect them. The person/entity that created the customized content has the sole responsibility for informing all the users of their system about the customizations. Contact your system administrator for more information on your customizations.

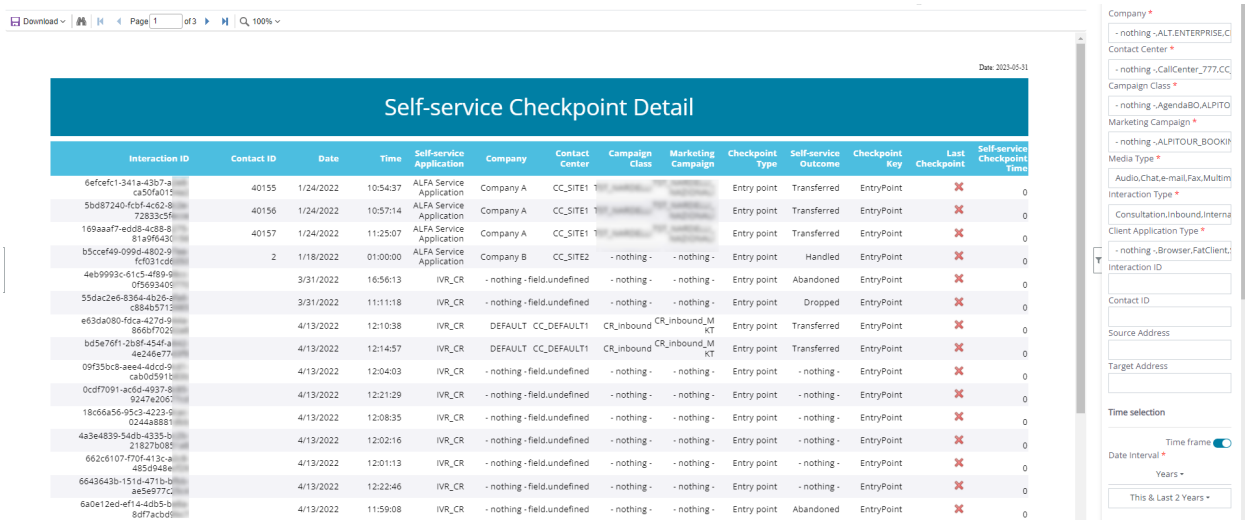
The following report values are used in the Self-service Checkpoint Utilization standard report:

Label	Tooltip
Unique Checkpoint Interactions	The total number of unique interactions that entered a self-service checkpoint. If the same interaction enters multiple checkpoints, or the same checkpoint multiple times, all the instances are NOT counted individually and are considered the same entry.
Checkpoint	The total number of interactions that entered the self-service checkpoint. If the same inter-

Label	Tooltip
Interactions	action enters multiple checkpoints, or the same checkpoint multiple times, all the instances are counted individually.
% Checkpoint Interactions on Total	The percentage of interactions that entered the self-service checkpoint (Checkpoint interactions) based on the first grouping level, compared to the total number of checkpoint interactions of the report. The total checkpoint interactions value is shown in the 'Total' row of the report.
% Checkpoint Interactions on Third Grouping Level	The percentage of interactions that entered the self-service checkpoint (Checkpoint interactions), compared to the total number of interactions on the third grouping level, as defined in your report.
% Checkpoint Interactions on Second Grouping level	The percentage of interactions that entered the self-service checkpoint (Checkpoint interactions), compared to the total number of interactions on the second grouping level, as defined in your report.
Self-service Checkpoint Time	Total time self-service interactions have spent interacting with self-service checkpoints, based on self-service interactions started in the time range set up in the report settings.
Avg Self-service Checkpoint Time	Average time interactions have spent interacting with each self-service checkpoint, based on self-service interactions started in the time range set up in the report settings.
Last Checkpoint	Number of times the checkpoint is the last checkpoint visited in an interaction's life cycle.
Terminated by Application	The number of interactions that were closed by the self-service application, either because the interaction was dropped, or because it was handled.
Terminated by Contact	The number of interactions that were abandoned by the contact.
Transferred Interactions	The number of interactions that were transferred to a queue or any other resource, such as an agent, a service or an external number.

Self-service Checkpoint Detail

This detailed standard report helps you see more useful data related to the self-service checkpoints in your system.



The asset description is divided into chapters as shown below. In these chapters, you can find out what the goal of the asset is, which filters you can use for your data, how to set up your asset, which graphical elements you can use in it (if they are available), and, finally, what each metric refers to.

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Objectives

The Self-service Checkpoint Detail Standard Report was created to provide you with more detailed information on the checkpoints used in your self-service apps and systems. Having the relevant data allows you to maximize the capacity of the self-service applications to satisfy the needs of contacts without having to involve agents directly, thereby also optimizing resource usage.

You can use the data provided in this report to diagnose and estimate possible areas for improvement with the self-service checkpoints.

Report parameters

> **Note**
> While Reporting Standard Reports can be implemented to many environments with little to no change, it is important to note that some settings, options and results may still vary based on your individual implementation, data and system settings. In case you have any questions, refer to your Administrator or Reporting contact.

Filters

You can use multiple filters for this report. From a list of available filters, select one or more values for which you want to see the data. For non-datetime filters, you can select all available values, search for specific values, or clear all selected values from the dropdown list. Mandatory filters are marked with *, while non-mandatory filters can be left empty, i.e., unset, in which case this filter will not influence the report.

Depending on the filter, the following options may be available in the dropdown filters along with the data from your data source:

- **- Not defined -**: Choosing this option includes the fields in your data source that have no (null) data.
- **- Not assigned -**: Selecting this option includes cases where an agent was not assigned to an interaction, such as for self-service interactions.

The following filters can be used for this report:

- **Company**: From the list of available companies, choose the companies that interactions were assigned to, and for which you want to see data.
- **Contact center**: Select the contact centers interactions were assigned to whose data you want to analyze in the report.
- **Campaign class**: Choose the names of the campaign classes the interaction you want to analyze were a part of. A campaign class is a group of similar or related marketing campaigns with the same overarching goal or purpose.
- **Marketing campaign**: Select the names of the marketing campaigns that the interactions you want to analyze were a part of. A marketing campaign is a group of outbound activities with the goal of advertising a service or product to contacts.
- **Media type**: From the dropdown list, select the specific media type(s) you want to filter your interactions by.
- **Interaction type**: Choose the type of interaction you want to see the data for. You can select one, multiple, or all options. The interaction types are as follows:
  - **Consultation**: Interactions done within the call center where agents consult with other agents, supervisors etc. to resolve an issue.
  - **Outbound**: Interactions initiated by an agent and directed to a contact through any available media types.
  - **Inbound**: Interactions initiated by the contact and aimed at the contact center through any available media types.
  - **Internal**: Interactions initiated for internal contact center purposes (and not directed toward contacts).

- **Client application type**: From the dropdown list, choose the type of client used by the end user (contact). For interactions with self-service activity, this is typically the navigator client type (smartphone OS, browser, etc.).
- **Interaction ID**: Enter the unique alphanumeric ID of the interaction. Once you enter an alphanumeric string in this field, data is filtered by fields that contain this string. For example, if you enter the numbers "123", all interactions that contain this string (in any position in its full Interaction ID string, but together and in this order) as part of the Interaction ID will be shown.
- **Contact ID**: Enter the unique alphanumeric ID of the contact. Once you enter an alphanumeric string in this field, data is filtered by fields that contain this string. For example, if you enter the numbers "123", all contacts that contain this string (in any position in its full Contact ID string, but together and in this order) as part of the Contact ID will be shown. If your system supports it, the Contact ID will remain the same for every interaction with the same contact (e.g. with the same phone number).
- **Source address**: Enter an alphanumeric string to filter your data by the telephone number, email address or other source media identifier of the entity that initiated the interaction (contact or contact center / agent). For example, for a call, the source address is the ANI. This filter is not mandatory.
- **Target address**: Enter an alphanumeric string to filter your data by the telephone number, email address or other target media identifier of the entity that received the interaction (contact or contact center / agent). For example, for a call, the target address is the DNIS. This filter is not mandatory.

Self-service

- **Self-service Application**: From the dropdown menu, choose the self-service applications used with interactions whose data you want to analyze.
- **Self-service Node**: Choose the server of self-service engine that runs the self-service applications handling interactions.
- **Self-service Instance**: Select the instances of the self-service engine that runs the self-service applications that are handling interactions.
- **Self-service Port**: Choose the relevant communication channel (port) in the self-service instance used for handling interactions.
- **Self-service Outcome**: Select the final outcome of the self-service interaction with the application.
- **Self-service Delay Reason**: Choose the relevant reason why interactions waited to interact with a self-service application.
- **Checkpoint Type**: From the dropdown list, select the needed classification of the self-service checkpoints.
- **Checkpoint Key**: Choose the relevant alphanumeric string identifier of a self-service checkpoint.
- **Checkpoint Detail**: Select the needed second-level detail of the self-service checkpoint.
- **Checkpoint Value**: Enter the value of the self-service checkpoint field; it can be empty if no data has been collected on the checkpoint. Note that the way checkpoint value data is collected varies greatly depending on the implementation.

Time selection

- **Date interval**: Choose the dates (interval) or relative time frame for the data. Switch between the Time frame and Interval mode by clicking the toggle just above the Date filter.

- **from - to**: Enter the **from** and **to** dates for your filter manually or select them from the dropdown menu.
- **Time frame**: Toggle the **Time frame** switch on to use the time frame mode. From the dropdown lists, choose the time unit (Days, Weeks, Months, Quarters or Years) and the relative time frame for your report.

- **Time interval (from and to)**: Choose the time interval in which the interactions you want to see started. From a list of full hours (24-hour format), choose the starting and ending hour to show your data in.

Settings

Time zone

With this setting, you can choose which time zone to view your data, filters and settings in. See *Report settings on page 10* for more information.

Duration display format

The **Duration display format** setting lets you define how you want to display the durations shown in your report. For more information, see this section.

Timestamp display format

By modifying this setting, you can choose how your timestamp data is displayed in the report. See *Report settings on page 10* for more information.

Show filters and settings sumup

Selecting this checkbox shows you a sumup of all report details. See more in *Report settings on page 10*.

Interaction Journey Report UUID

Enter the UUID of the detail report that you want to open when you click an interaction in the report. See more in *Master-Detail report relationships on page 15*.

Report values definition

Report values are part of the report itself and are shown once the report is generated. They are predefined and cannot be modified through the report settings and filters. In practical terms, report values are the columns shown in your report. Each metric shown in your report's columns is described below in more detail; explanations are also available on hover over the individual metrics in the report.

The list below shows **all the available metrics and KPIs** that could be used as columns in your report, but which will rarely all be used at the same time and in the same report. The actual metrics used in a report may vary based on your implementation and the use of **report views**, as created by the Report Designer. See *Report Views on page 4* for more information.

Caution

Some UI elements, such as tooltips and labels, can be customized to fit your team's or company's needs. However, if any customizations are applied, especially for the values presented in the table below, this document does **not** reflect them. The person/entity that created the customized content has the sole responsibility for informing all the users of their system about the customizations. Contact your system administrator for more information on your customizations.

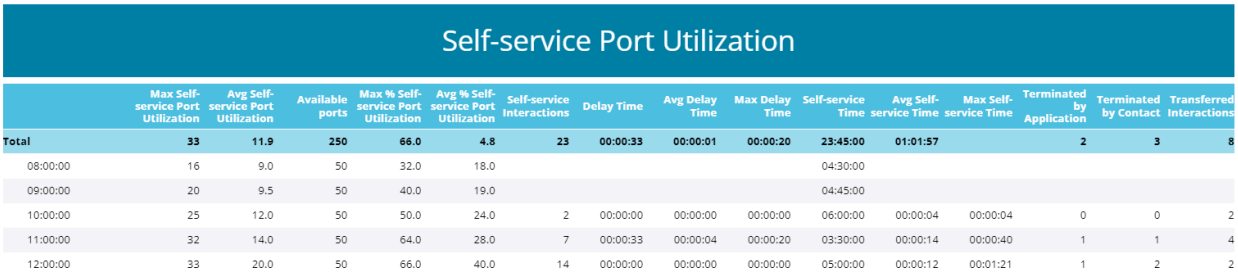
The following report values are used in the Self-service Checkpoint Detail standard report:

Label	Tooltip
Company	Company the interaction is assigned to.
Contact Center	Contact center the interaction is assigned to.
Campaign Class	The name of the campaign class the interaction was a part of. A campaign class is a group of similar or related marketing campaigns with the same overarching goal or purpose.
Marketing Campaign	The name of the marketing campaign the interaction was a part of. A marketing campaign is a group of outbound activities with the goal of advertising a service or product to contacts.
Media Type	The type of media, or communication channel, used to . This refers to the tools that the contact and agent or contact center used to communicate. Media types include, but are not limited to, emails, chat, telephone etc. The available types may vary based on your implementation.
Interaction Type	The type, or direction, of the interaction handled by the self-service application. This refers to the way contacts, i.e. interactions were initiated and connected with the system. This includes outbound (started by an agent and aimed at a contact), inbound (started by a contact and aimed at the contact center), and internal (for internal contact center purposes) interactions.
Client Application Type	Type of client used by the end user (contact). For interactions with self-service activity, this is typically the navigator client type (smartphone OS, browser, etc.).
Interaction ID	Unique alphanumeric string identifier of an interaction.
Contact ID	Unique alphanumeric string identifier of a contact. If your integration supports it, the Contact ID will remain the same for every interaction that involves the same contact (e.g. same phone number or email address).
Source address	The telephone number, email address or other source media identifier of the entity (contact or contact center / agent) that initiated the interaction. For example, for a call, the source address is the ANI.
Target address	The telephone number, email address or other target media identifier of the entity (contact or contact center / agent) that received the interaction. For exmple, for a call, the target address is the DNIS.
Self-service Application	Name of the self-service application or script.

Label	Tooltip
Self-service Node	Server of self-service engine that runs the self-service applications handling interactions.
Self-service Instance	Instance of self-service engine that runs the self-service applications handling interactions.
Self-service Port	Communication channel (port) in self-service instance used for handling interactions.
Self-service Outcome	Final outcome of the self-service interaction with the application. Possible outcomes include the interaction being abandoned, dropped, handled, placed in a queue, or transferred to another service, agent or external resource.
Self-service Delay Reason	Reason why interactions waited to interact with a self-service application. Such reasons can be, for example, a lack of licenses or ports.
Checkpoint Type	Classification of the checkpoint. Examples include transit, transfer to queue, self-service abandon, out of working time, and other checkpoint types.
Checkpoint Key	Alphanumeric string identifier of a self-service checkpoint.
Checkpoint Detail	Second-level detail of the self-service checkpoint.
Checkpoint Value	Value of the self-service checkpoint field; it can be empty if no data has been collected on the checkpoint. The way checkpoint value data is collected varies greatly depending on the implementation.
Date	The date when the interaction entered the self-service checkpoint.
Time	The time when the interaction entered the self-service checkpoint.
Self-service Checkpoint Time	Total time self-service interactions have spent interacting with self-service checkpoints, based on self-service interactions started in the time range set up in the report settings.
Last Check-point	Flag set to true if the checkpoint is an interaction's last visited checkpoint.
Terminated by Application	Flag set to true for interactions that were closed by the self-service application, either because the interaction was dropped, or because it was handled.
Terminated by Contact	Flag set to true for interactions that were abandoned by the contact.
Transferred Interactions	Flag set to true for interactions that were transferred to a queue or any other resource, such as an agent, a service or an external number.

Self-service Port Utilization

This standard report helps you see data about how self-service ports are used, what their availability is, as well as some metrics related to the interactions that are related to these ports.



Self-service Port Utilization

	Max Self-service Port Utilization	Avg Self-service Port Utilization	Available ports	Max % Self-service Port Utilization	Avg % Self-service Port Utilization	Self-service Interactions	Delay Time	Avg Delay Time	Max Delay Time	Self-service Time	Avg Self-service Time	Max Self-service Time	Terminated by Application	Terminated by Contact	Transferred Interactions
Total	**33**	**11.9**	**250**	**66.0**	**4.8**	**23**	**00:00:33**	**00:00:01**	**00:00:20**	**23:45:00**	**01:01:57**		**2**	**3**	**8**
08:00:00	16	9.0	50	32.0	18.0					04:30:00					
09:00:00	20	9.5	50	40.0	19.0					04:45:00					
10:00:00	25	12.0	50	50.0	24.0	2	00:00:00	00:00:00	00:00:00	06:00:00	00:00:04	00:00:04	0	0	2
11:00:00	32	14.0	50	64.0	28.0	7	00:00:33	00:00:04	00:00:20	03:30:00	00:00:14	00:00:40	1	1	4
12:00:00	33	20.0	50	66.0	40.0	14	00:00:00	00:00:00	00:00:00	05:00:00	00:00:12	00:01:21	1	2	2

The asset description is divided into chapters as shown below. In these chapters, you can find out what the goal of the asset is, which filters you can use for your data, how to set up your asset, which graphical elements you can use in it (if they are available), and, finally, what each metric refers to.

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Objectives

The Self-service Port Utilization Standard Report was created to analyze the performance of self-service applications, more specifically, the self-service ports used to handle interactions.

Having the relevant data allows you to maximize the capacity of the self-service ports to satisfy the needs of contacts without having to involve agents directly, thereby also optimizing resource usage.

With this report, you can also identify possible areas for improvement with the self-service ports.

In short, this report provides you insight into how self-service ports are used, giving you the most important KPIs per self-service port.

Report parameters

> **Note**
> While Reporting Standard Reports can be implemented to many environments with little to no change, it is important to note that some settings, options and results may still vary based on your individual implementation, data and system settings. In case you have any questions, refer to your Administrator or Reporting contact.

Filters

You can use multiple filters for this report. From a list of available filters, select one or more values for which you want to see the data. For non-datetime filters, you can select all available values, search for specific values, or clear all selected values from the dropdown list. Mandatory filters are marked with *, while non-mandatory filters can be left empty, i.e., unset, in which case this filter will not influence the report.

Depending on the filter, the following options may be available in the dropdown filters along with the data from your data source:

- **- Not defined -**: Choosing this option includes the fields in your data source that have no (null) data.
- **- Not assigned -**: Selecting this option includes cases where an agent was not assigned to an interaction, such as for self-service interactions.

The following filters can be used for this report:

- **Company**: From the list of available companies, choose the companies that interactions were assigned to, and for which you want to see data.
- **Contact center**: Select the contact centers interactions were assigned to whose data you want to analyze in the report.
- **Interaction type**: Choose the type of interaction you want to see the data for. You can select one, multiple, or all options. The interaction types are as follows:
  - **Consultation**: Interactions done within the call center where agents consult with other agents, supervisors etc. to resolve an issue.
  - **Outbound**: Interactions initiated by an agent and directed to a contact through any available media types.
  - **Inbound**: Interactions initiated by the contact and aimed at the contact center through any available media types.
  - **Internal**: Interactions initiated for internal contact center purposes (and not directed toward contacts).
- **Media type**: From the dropdown list, select the specific media type(s) you want to filter your interactions by.
- **Client application type**: From the dropdown list, choose the type of client used by the end user (contact). For interactions with self-service activity, this is typically the navigator client type (smartphone OS, browser, etc.).
- **Self-service node**: Choose the server of self-service engine that runs the self-service applications handling interactions.

- **Self-service instance**: Select the instances of the self-service engine that runs the self-service applications that are handling interactions.

Time selection

- **Date interval**: Choose the dates (interval) or relative time frame for the data. Switch between the Time frame and Interval mode by clicking the toggle just above the Date filter.
  - **from - to**: Enter the **from** and **to** dates for your filter manually or select them from the dropdown menu.
  - **Time frame**: Toggle the **Time frame** switch on to use the time frame mode. From the dropdown lists, choose the time unit (Days, Weeks, Months, Quarters or Years) and the relative time frame for your report.
- **Time interval (from and to)**: Choose the time interval in which the interactions you want to see started. From a list of full hours (24-hour format), choose the starting and ending hour to show your data in.

Settings

Time zone

With this setting, you can choose which time zone to view your data, filters and settings in. See *Report settings on page 10* for more information.

Graphical elements

In this report, you can utilize various types of graphical elements to visualize your data. You can choose to use none of the graphical elements, one of them, or more of them at the same time. If you choose to use any of the graphical elements, they are placed at the top of the report and one under the other (if multiple are selected), as can be seen in the example in *Settings on page 10*.

The following graphical elements can be used with this report:

- **Bar chart**: This bar chart, titled "**Peak Self-Service Port Utilization By Third Grouping Level**", shows the count of self-service ports during peak utilization. Only the third data grouping level is used in this report. Hover over each bar to see the label and/or value of that bar. Overall:
  - The X-Axis always shows the peak count, i.e., number of utilized self-service ports.
  - The Y-Axis uses your third data grouping level setting and shows the individual values for that setting. For example, if you choose "Day" as your third data grouping level, the individual days in the set-up time range will be shown on the Y-Axis.
  - Additionally, the bars also each represent a value of the third data grouping level, as set up in your report settings.
- **Stacked bar chart**: The stacked bar chart titled "**Peak Self-Service Port Utilization By Third and Second Grouping Level**" shows the count of self-service ports during peak utilization. The bars are also stacked to show data from the second data grouping level. Therefore, the third and second data grouping levels are used in this report. Hover over each bar to see the label and/or value of that bar. Overall:
  - The X-Axis always shows the peak count, i.e., number of utilized self-service ports.

- The Y-Axis uses your third data grouping level setting and shows the individual values for that setting.
- The individual bars are stacked, showing second data grouping level data for each individual third data grouping level value.
- For example, you can select "Month" as your third data grouping level, and "Contact Center" as your second data grouping level. In this case, the individual months in the set-up time range will be shown on the Y-Axis, while the bars will be stacked to show the different contact centers that utilized self-service ports during those months.

Duration display format

The **Duration display format** setting lets you define how you want to display the durations shown in your report. For more information, see this section.

Date display format

Using this setting, you can modify the way your date data is displayed in the report. See *Report settings on page 10* for more information.

Show filters and settings sumup

Selecting this checkbox shows you a sumup of all report details. See more in *Report settings on page 10*.

Data grouping levels

Up to three data grouping levels can be set up for the parameters in this report. Only the first (lowest) level is mandatory; the other grouping levels are optional and can be left unset. If unset, these data grouping levels will not be shown in the report.

The following parameters can be selected from dropdown lists and used as the data grouping levels in this report:

- **Company**: Name of the company.
- **Contact Center**: Name of the contact center.
- **Media type**: The channel used by the agent to handle the interaction; examples include telephone, emails, chat etc.
- **Interaction type**: The "direction" of the interaction.
- **Client Application Type**: Type of client used by the end user (contact).
- **Self-service Node**:Server of the self-service engine that runs the self-service applications handling interactions.
- **Self-service Instance**: Instances of the self-service engine that runs the self-service applications that are handling interactions.
- **Year/Month/Day/Hour**: Time unit to be used as a grouping level.

> **Note**
>
> The totals in each row of this are not calculated through the sums of the details shown in the report, but instead take advantage of the different rows available in your DWH. This means that depending on your settings, the totals in the rows of your report may be higher or lower than the sum of the individual detail values below them. For more information on how a specific total is calculated, contact your Administrator or Designer.

Low Level Detail Dimensions

In the Self-service Port Utilization report specifically, due to the way the relevant standard data warehouse tables are structured and how this report utilizes them, a new, report-specific parameter has been added, titled "Low level detail dimensions". This setting is **only relevant for Report Designers and Power Viewers**, and can typically not be seen or used by Viewers. For more information on this setting, see *Low level detail dimensions on the next page*.

Report values definition

Report values are part of the report itself and are shown once the report is generated. They are predefined and cannot be modified through the report settings and filters. In practical terms, report values are the columns shown in your report. Each metric shown in your report's columns is described below in more detail; explanations are also available on hover over the individual metrics in the report.

The list below shows **all the available metrics and KPIs** that could be used as columns in your report, but which will rarely all be used at the same time and in the same report. The actual metrics used in a report may vary based on your implementation and the use of **report views**, as created by the Report Designer. See *Report Views on page 4* for more information.

> **Caution**
>
> Some UI elements, such as tooltips and labels, can be customized to fit your team's or company's needs. However, if any customizations are applied, especially for the values presented in the table below, this document does **not** reflect them. The person/entity that created the customized content has the sole responsibility for informing all the users of their system about the customizations. Contact your system administrator for more information on your customizations.

The following report values are used in the Self-service Port Utilization standard report:

Label	Tooltip
Available ports	Number of ports that the self-service nodes and instances provide, regardless of which ports are currently being used and which are not.
Avg % Self-service Port Utilization	Average percentage of concurrent ports in use for handling self-service interactions on available ports.
Avg Delay Time	Average time all interactions waited to interact with the self-service application. This includes all interactions and interaction outcomes included in the report settings and filters.

Label	Tooltip
Avg Self-service Port Utilization	Average number of concurrent ports in use for handling self-service interactions.
Avg Self-service Time	Average time self-service interactions have spent time interacting with the self-service application. This refers to all interactions started in the time period defined in the report settings and filters.
Delay Time	Total time all interactions waited to interact with the self-service application. This includes all interactions and interaction outcomes included in the report settings, filter and date and time range.
Max % Self-service Port Utilization	Maximum percentage of concurrent ports in use for handling self-service interactions on available ports.
Max Delay Time	Maximum time an interaction had to wait to interact with the self-service application. This includes all interactions and interaction outcomes included in the report settings, filter and date and time range.
Max Self-service Port Utilization	Maximum number of concurrent ports in use for handling self-service interactions.
Max Self-service Time	Maximum time self-service interactions have spent interacting with the self-service application, based on interactions started in the time range set up in the report settings.
Self-service Interactions	The total number of interactions that entered the self-service application. If the same interaction enters multiple self-service applications, or the same application multiple times, all the instances are counted individually.
Self-service Time	Total time the interactions have spent time interacting with the self-service application. This refers to all interactions started in the time period defined in the report settings and filters.
Terminated by Application	The number of interactions that were closed by the self-service application, either because the interaction was dropped, or because it was handled.
Terminated by Contact	The number of interactions that were abandoned by the contact.
Transferred Interactions	The number of interactions that were transferred to a queue or any other resource, such as an agent, a service or an external number.

Low level detail dimensions

> **Note**
> This section is relevant for **Report Designers** and **Power Viewers** only.

In the Self-service Port Utilization report, a new, report-specific parameter was added, titled "**Low level detail dimensions**". This is a **view-related setting** and needs to be taken into consideration for **all views** created from this report.

For this report, data can be stored in the relevant data warehouse table in multiple levels, but only the lowest level will be utilized by the report. Therefore, this parameter defines which data is going to be used by the report as the lowest level. This is important for a number of calculations and KPIs in this report.

For example, looking at the "Max Self-service Port Utilization" value, the totals and sub-totals for this KPI are calculated based only on the low level detail dimension(s) you select. In the case of the example below, they will show the maximum number of utilized ports for the data you set up as the low level detail dimension(s).

	Max self service port util
Total	**33**
VXML1	25
2022-01-18	25
2022-01-24	16
VXML2	33
2022-01-18	33

> **Caution**
>
> It is highly recommended to **always** set up this parameter as a **hidden background parameter** for every report view created from this report in order to ensure that Viewers cannot interact with this parameter, as it is crucial for the correct and expected functioning of every view. Additionally, you need to adjust all other parameters (including background/hidden parameters) to this setting. For example, if "Media type" is excluded from the Low level detail dimensions of a report view, typically it would also need to be excluded from any other view filters and settings.

Self-service Summary

This standard report helps you understand how the self-service checkpoints in your contact center are being engaged by contacts.

The asset description is divided into chapters as shown below. In these chapters, you can find out what the goal of the asset is, which filters you can use for your data, how to set up your asset, which graphical elements you can use in it (if they are available), and, finally, what each metric refers to.

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Filters *104*

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Objectives

The Self-service Summary Standard Report was created with the goal of providing users with the data needed to analyze how users interact with your self-service applications. With this report, you also gain insight into a higher-level overview of the way your self-service applications work.

Using this report and the insights gained from it can help you improve the performance of your self-service applications, as well as identify and work on potential issues and areas of improvement.

Ultimately, with this report, you access the details related to your self-service applications through viewing the most important KPIs related to this area of your contact center.

This report should be usable for multiple environments with little or no need for adaptation.

Report parameters

> **Note**
> While Reporting Standard Reports can be implemented to many environments with little to no change, it is important to note that some settings, options and results may still vary based on your individual implementation, data and system settings. In case you have any questions, refer to your Administrator or Reporting contact.

Filters

You can use multiple filters for this report. From a list of available filters, select one or more values for which you want to see the data. For non-datetime filters, you can select all available values, search for specific values, or clear all selected values from the dropdown list. Mandatory filters are marked with *, while non-mandatory filters can be left empty, i.e., unset, in which case this filter will not influence the report.

Depending on the filter, the following options may be available in the dropdown filters along with the data from your data source:

- **- Not defined -**: Choosing this option includes the fields in your data source that have no (null) data.
- **- Not assigned -**: Selecting this option includes cases where an agent was not assigned to an interaction, such as for self-service interactions.

The following filters can be used for this report:

- **Company**: From the list of available companies, choose the companies that interactions were assigned to, and for which you want to see data.
- **Contact center**: Select the contact centers interactions were assigned to whose data you want to analyze in the report.
- **Campaign class**: Choose the names of the campaign classes the interaction you want to analyze were a part of. A campaign class is a group of similar or related marketing campaigns with the same overarching goal or purpose.
- **Marketing campaign**: Select the names of the marketing campaigns that the interactions you want to analyze were a part of. A marketing campaign is a group of activities with the goal of advertising a service or product to contacts.
- **Interaction type**: Choose the type of interaction you want to see the data for. You can select one, multiple, or all options. The interaction types are as follows:
  - **Consultation**: Interactions done within the call center where agents consult with other agents, supervisors etc. to resolve an issue.
  - **Outbound**: Interactions initiated by an agent or the system and directed to a contact through any available media types.
  - **Inbound**: Interactions initiated by the contact and aimed at the contact center through any available media types.
  - **Internal**: Interactions initiated for internal contact center purposes (and not directed toward contacts).
- **Media type**: From the dropdown list, select the specific media type(s) you want to filter your interactions by.
- **Client application type**: From the dropdown list, choose the type of client used by the end user (contact). For interactions with self-service activity, this is typically the navigator client type (smartphone OS, browser, etc.).

Self-service

- **Self-service application**: From the dropdown menu, choose the self-service applications used with interactions whose data you want to analyze.
- **Self-service node**: Choose the server of self-service engine that runs the self-service applications handling interactions.
- **Self-service instance**: Select the instances of the self-service engine that runs the self-service applications that are handling interactions.
- **Self-service port**: Choose the relevant communication channel (port) in the self-service instance used for handling interactions.
- **Self-service outcome**: Select the final outcome of the self-service interaction with the application.

- **Self-service delay reason**: Choose the relevant reason why interactions waited to interact with a self-service application.
- **Checkpoint type**: From the dropdown list, select the needed classification of the self-service checkpoints.
- **Checkpoint key**: Choose the relevant alphanumeric string identifier of a self-service checkpoint.
- **Checkpoint detail**: Select the needed second-level detail of the self-service checkpoint.
- **Checkpoint value**: Enter the value of the self-service checkpoint field; it can be empty if no data has been collected on the checkpoint. Note that the way checkpoint value data is collected varies greatly depending on the implementation.

Time selection

- **Date interval**: Choose the dates (interval) or relative time frame for the data. Switch between the Time frame and Interval mode by clicking the toggle just above the Date filter.
  - **from - to**: Enter the **from** and **to** dates for your filter manually or select them from the dropdown menu.
  - **Time frame**: Toggle the **Time frame** switch on to use the time frame mode. From the dropdown lists, choose the time unit (Days, Weeks, Months, Quarters or Years) and the relative time frame for your report.
- **Time interval (from and to)**: Choose the time interval in which the interactions you want to see started. From a list of full hours (24-hour format), choose the starting and ending hour to show your data in.

Settings

Time zone

With this setting, you can choose which time zone to view your data, filters and settings in. See *Report settings on page 10* for more information.

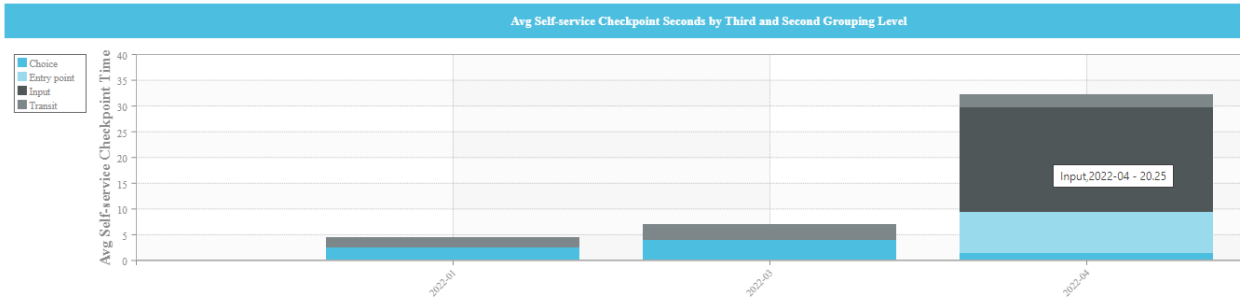
Graphical elements

In this report, you can utilize various types of graphical elements to visualize your data. You can choose to use none of the graphical elements, one of them, or more of them at the same time. If you choose to use any of the graphical elements, they are placed at the top of the report and one under the other (if multiple are selected), as can be seen in the example in *Settings on page 10*.

The following graphical elements can be used with this report:

- **Column chart**: The stacked column chart titled "**Avg Self-service Checkpoint Seconds by Third and Second Grouping Level**" shows the average self-service checkpoint time (in seconds), distributed by the second-highest data grouping level (X-Axis) that you set up in your report settings. If you set up more than one data grouping level, the highest available one is used to stack the data on each column. Overall:
  - The Y-Axis always shows the average self-service checkpoint time.
  - The X-Axis varies depending on what metric you set up as the second-highest (or only) data grouping level in your report.

- The columns can be stacked, and the criteria by which it is stacked is the highest data grouping level, as set up in your report. This is only applicable if two or more data grouping levels are used in the report.
- Hover over each column or stacked segment to see its value in seconds.
- The example below shows the column chart. The second-highest data grouping level set up in the settings used to generate this example is "Month" (shown on the X-Axis as the individual columns) and "Checkpoint Type" is the highest set-up data grouping level (shown in the stacking of the columns and the chart legend). Therefore, this chart shows the average number of seconds spent in self-service checkpoints per each month, stacked to show the monthly values for each checkpoint type.



- **Pie chart**: This pie chart, titled "**Number of Interactions by Third Grouping Level**", shows you the percentage distribution of the number of interactions distributed across the value of the highest data grouping level you set up in the report, using the time range you enter and other filters and settings. Overall:
  - Only one data grouping level is used as the basis for this report. If multiple data grouping levels are set up, only the highest is used.
  - A legend is available on the left side of the graphical element which shows the individual values of the pie slices.
  - Hover over each pie slice to see the absolute value of the slice.
  - For example, if " Contact Center" is the highest set-up grouping level in your report (regardless of what the lower ones are, if there are any), you will see the percentage distribution of the number of interactions that have been interacted with in any way in each of the contact centers available in your system, depending on your filters (one pie slice per contact center).

- **Bubble Chart**: The bubble chart in this report is titled **Distribution of Interactions and Checkpoints**. It shows the relationship between self-service interactions and the number of used checkpoints, grouped by the user-selected value for the highest set-up data grouping level in the report. In other words:
  - The bubble size represents the absolute time contacts have spent in self-service checkpoints, grouped by the individual values of the highest set-up data grouping level.
  - The color of the bubble reflects the individual values of the highest set-up data grouping level. These values are also shown in the report legend.
  - The Y-Axis always shows the number of unique self-service interactions.
  - The X-Axis always shows the number of self-service checkpoints.

Duration display format

The **Duration display format** setting lets you define how you want to display the durations shown in your report. For more information, see this section.

Show filters and settings sumup

Selecting this checkbox shows you a sumup of all report details. See more in *Report settings on page 10*.

Date display format

Using this setting, you can modify the way your date data is displayed in the report. See *Report settings on page 10* for more information.

Data grouping levels

Up to three data grouping levels can be set up for the parameters in this report. Only the first (lowest) level is mandatory; the other grouping levels are optional and can be left unset. If unset, these data grouping levels will not be shown in the report.

The following parameters can be selected from dropdown lists and used as the data grouping levels in this report:

- **Company**: Name of the company.
- **Contact Center**: Name of the contact center.
- **Campaign Class**: The name of the campaign class. A campaign class is a group of similar or related marketing campaigns with the same overarching goal or purpose.
- **Marketing Campaign**: The name of the marketing campaign. A marketing campaign is a group of outbound activities with the goal of advertising a service or product to contacts.
- **Checkpoint Key**: Alphanumeric string identifier of a self-service checkpoint.
- **Checkpoint Detail**: Second-level detail of the self-service checkpoint.
- **Checkpoint Type**: Classification of the self-service checkpoint.
- **Checkpoint Value**: The value of the self-service checkpoint field. Note that the way checkpoint value data is collected varies greatly depending on the implementation.
- **Interaction Type**: The "direction" of the interaction.

- **Media type**: The channel used by the agent to handle the interaction; examples include telephone, emails, chat etc.
- **Client Application Type**: Type of client used by the end user (contact).
- **Self-service Application**: Self-service applications used for interactions.
- **Self-service Delay Reason**: Reason why interactions waited to interact with a self-service application.
- **Self-service Instance**: Instances of the self-service engine that runs the self-service applications that are handling interactions.
- **Self-service Node**:Server of the self-service engine that runs the self-service applications handling interactions.
- **Self-service Outcome**: Final outcome of the self-service interaction with the application.
- **Self-service Port**: Communication channel (port) in the self-service instance used for handling interactions.
- **Year/Month/Day/Hour**: Time unit to be used as a grouping level.

> **Note**
> The totals in each row of this are not calculated through the sums of the details shown in the report, but instead take advantage of the different rows available in your DWH. This means that depending on your settings, the totals in the rows of your report may be higher or lower than the sum of the individual detail values below them. For more information on how a specific total is calculated, contact your Administrator or Designer.

Report values definition

Report values are part of the report itself and are shown once the report is generated. They are predefined and cannot be modified through the report settings and filters. In practical terms, report values are the columns shown in your report. Each metric shown in your report's columns is described below in more detail; explanations are also available on hover over the individual metrics in the report.

The list below shows **all the available metrics and KPIs** that could be used as columns in your report, but which will rarely all be used at the same time and in the same report. The actual metrics used in a report may vary based on your implementation and the use of **report views**, as created by the Report Designer. See *Report Views on page 4* for more information.

> **Caution**
> Some UI elements, such as tooltips and labels, can be customized to fit your team's or company's needs. However, if any customizations are applied, especially for the values presented in the table below, this document does **not** reflect them. The person/entity that created the customized content has the sole responsibility for informing all the users of their system about the customizations. Contact your system administrator for more information on your customizations.

The following report values are used in the Self-service Summary standard report:

Label	Tooltip
Avg Delay Time	Average time all interactions waited to interact with the self-service application. This includes all interactions and interaction outcomes included in the report settings and filters.

Label	Tooltip
Avg Self-service Checkpoint Time	Average time interactions have spent interacting with each self-service checkpoint, based on self-service interactions started in the time range set up in the report settings.
Avg Self-service Path Length	Average number of checkpoints each interaction entered during its life cycle, including checkpoints entered when moving through multiple applications. This is calculated by dividing the total number of checkpoint entries with the total number of non-unique interactions.
Avg Self-service Time	Average time self-service interactions have spent time interacting with the self-service application. This refers to all interactions started in the time period defined in the report settings and filters.
Checkpoint entries	The total number of times that interactions have entered any checkpoint during their lifecycle, including all times a they entered checkpoints when moving through multiple applications. If a checkpoint is entered multiple times by the same interaction, all the entries are included in this metric.
Delay Time	Total time all interactions waited to interact with the self-service application. This includes all interactions and interaction outcomes included in the report settings, filter and date and time range.
Max Self-service Path Length	Maximum number of checkpoints each interaction entered during its life cycle, including checkpoints entered when moving through multiple applications.
Min Self-service Path Length	Minimum number of checkpoints each interaction entered during its life cycle, including checkpoints entered when moving through multiple applications.
Self-service Interactions	The total number of interactions that entered the self-service application. If the same interaction enters multiple self-service applications, or the same application multiple times, all the instances are counted individually.
Self-service Time	Total time the interactions have spent time interacting with the self-service application. This refers to all interactions started in the time period defined in the report settings and filters.
Terminated by Application	The number of interactions that were closed by the self-service application, either because the interaction was dropped, or because it was handled.
Terminated by Contact	The number of interactions that were abandoned by the contact.
Transferred Interactions	The number of interactions that were transferred to a queue or any other resource, such as an agent, a service or an external number.
Unique Self-service Interactions	The total number of unique interactions that entered the self-service application. If the same interaction enters multiple self-service applications, or the same application multiple times, all the instances are NOT counted individually and are considered the same interaction.

Initial Skill Demand per Queue

In this report, you can see data about the behavior of interactions in queues, specifically in the context of required skills and the releasing or preserving of these skills. With this report, you can keep an eye on the way demanded skills for individual interactions are managed throughout the queueing and handling process.

The asset description is divided into chapters as shown below. In these chapters, you can find out what the goal of the asset is, which filters you can use for your data, how to set up your asset, which graphical elements you can use in it (if they are available), and, finally, what each metric refers to.

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Objectives

The Initial Skill Demand per Queue base report provides users insight into how their queues are performing, specifically in the context of skills that are required for an interaction.

With the help of this report, users can analyze the required skills in queues, and use that information to meet the needs of the contacts and interactions. This can be done by using the data in this report to increase the contact center interactions quality through improving the missing skills or skill levels.

Ultimately, through this report, users can get detailed information about the skills requirements in their queues and the satisfaction relate to the use of these skills.

Report parameters

> **Note**
> While Reporting standard assets, such as standard reports, can be implemented to many environments with little to no change, it is important to note that some settings, options and results may still vary based on your individual implementation, data and system settings. In case you have any questions, refer to your Administrator or Reporting contact.

Filters

You can use multiple filters for this report. From a list of available filters, select one or more values for which you want to see the data. For non-datetime filters, you can select all available values, search for specific values,

or clear all selected values from the dropdown list. Mandatory filters are marked with *, while non-mandatory filters can be left empty, i.e., unset, in which case this filter will not influence the report.

Depending on the filter, the following options may be available in the dropdown filters along with the data from your data source:

- **- Not defined -**: Choosing this option includes the fields in your data source that have no (null) data.
- **- Not assigned -**: Selecting this option includes cases where an agent was not assigned to an interaction, such as for self-service interactions.

The following filters can be used for this report:

- **Company**: Choose the companies you want to see data for from the list of available companies.
- **Contact center**: Select the contact centers whose data you want to analyze in the report.
- **Agent ID**: From a list of available agents, select one or more agents for which you want to see the report data.
- **Agent group**: Choose the name of the group the agent belongs to.
- **Agent analysis group**: From the dropdown list, choose the relevant groupings of agents. These groupings are used to facilitate analysis within the report, and are independent of the 'Agent group' filter. They can be defined through various methods for an integration, such as through the ETL process or a specific script.
- **Queue ID**: Choose the specific queue(s) whose data you want to use in the report.
- **Queue analysis group**: From the dropdown list, select the queue groups whose data you want to use for the report.
- **Media type**: From the dropdown list, select the specific media type(s) you want to filter your interactions by.
- **Required skills**: Choose the needed skill from a list of skills that were required for a specific interaction (if any).
- **Min skill level**: Select the minimum required skill level for the skills that were required for interactions.
- **Max skill level**: Select the maximum required skill level for the skills that were required for interactions.
- **Skill released flag**: From the dropdown list, choose between skills that were preserved (kept by the system after queueing) or released (dropped by the system after queueing, such as due to being unable to fulfill the required skill).

Time selection

- **Date interval**: Choose the dates (interval) or relative time frame for the data. Switch between the Time frame and Interval mode by clicking the toggle just above the Date filter.
  - **from - to**: Enter the **from** and **to** dates for your filter manually or select them from the dropdown menu.
  - **Time frame**: Toggle the **Time frame** switch on to use the time frame mode. From the dropdown lists, choose the time unit (Days, Weeks, Months, Quarters or Years) and the relative time frame for your report.
- **Time interval (from and to)**: Choose the time interval in which the interactions you want to see started. From a list of full hours (24-hour format), choose the starting and ending hour to show your data in.

Settings

Time zone

With this setting, you can choose which time zone to view your data, filters and settings in. See *Report settings on page 10* for more information.

Duration display format

The **Duration display format** setting lets you define how you want to display the durations shown in your report. For more information, see this section.

Thresholds

In this report, you can also set certain thresholds for your data. All thresholds are mandatory (marked with *).

> **Note**
> The thresholds are defined in seconds and include the value entered in the field. For example, if you enter 20 as the threshold value, the relevant outcomes that were reached within 20 seconds or less (=< 20s) will be used.

In this report, you can set the following thresholds:

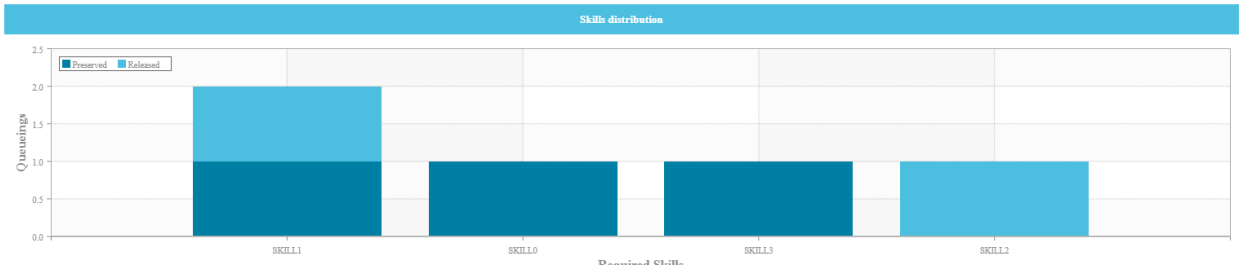
- **Short Conversations Threshold (s)**: If an interaction is finished (handled or other) within the time (in seconds) defined with this threshold, it is considered a "short conversation". This threshold refers to the time between when both parties start an active and live conversation (online activity), for example when both the agent and the contact pick up the call, to the moment when the live conversation stops, for example when the contact hangs up.
- **Short Abandons Threshold (s)**: With this threshold, you define within how many seconds an interaction needs to be abandoned to be considered a "short abandon". For example, if you enter 20 as the threshold value, only abandons that occurred in the first 20 seconds (including the 20 second mark) in a queue will be considered "short abandons".
- **Service Level Threshold (s)**: This threshold defines within how many seconds an interaction needs to be handled in order to comply with the Service Level Agreement. This includes all steps of an interaction up until the moment it is assigned the "Handled" outcome. For example, if you enter 60 as the threshold value, only interactions from queues that were handled within 60 seconds (including the 60 second mark) will be considered as complying with the SLA.

Graphical elements

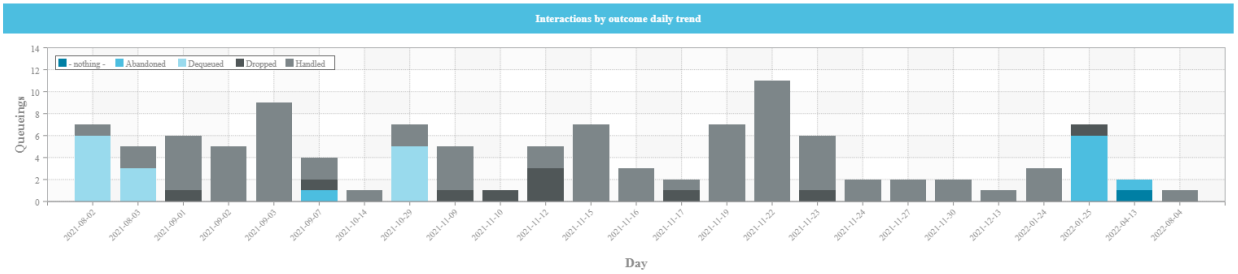
In this report, you can utilize various types of graphical elements to visualize your data. You can choose to use none of the graphical elements, one of them, or more of them at the same time. If you choose to use any of the graphical elements, they are placed at the top of the report and one under the other (if multiple are selected), as can be seen in the example in *Settings on page 10*.

The following graphical elements can be used with this report:

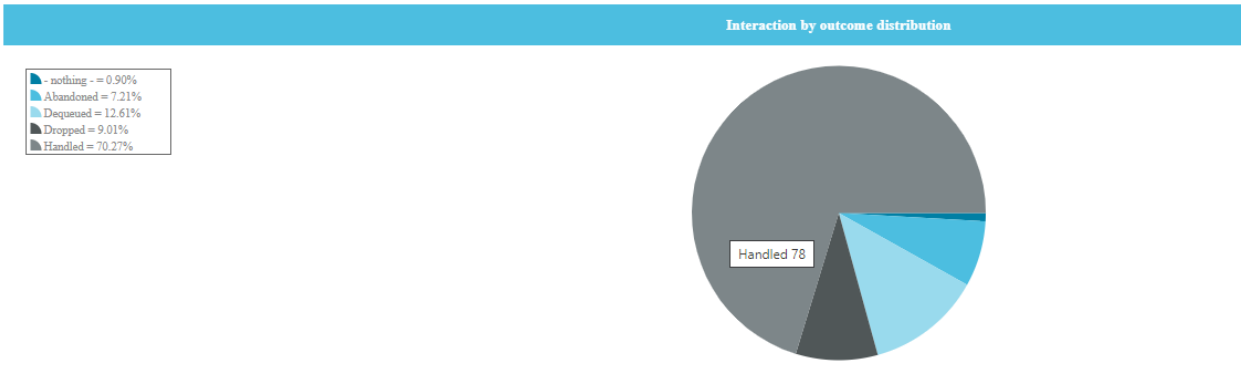
- **Column chart: Skills**: This column chart is titled **Skills distribution**, and it shows the number of queueings per each individual skill. In this chart:
  - The X-Axis always shows all the available individual skills.
  - The Y-Axis always shows the number of queueings.
  - Columns are stacked to represent the number of times each individual skill was preserved or released.
  - Data grouping level settings do not influence the look and data.



- **Column chart: Outcomes**: The column chart titled **Interactions by outcome daily trend** represents the daily changes in the interaction outcomes data. A legend is available by the chart to show the colors and their corresponding outcomes.
  - The Y-Axis represents the number of queueings.
  - The X-Axis represents the individual days (dates) in your filtered data range. Each column corresponds to one day.
  - The columns of the chart are stacked, meaning that all interaction outcomes within one day are stacked on top of each other, with their height proportionate to the number of interactions for each outcome.
  - Data grouping level settings do not influence the look and data.



- **Pie chart: Outcomes**: The pie chart titled **Interactions by outcome distribution** shows the percentage distribution of all individual queueing outcomes, compared to the total number of queueings. With this chart, you can see what the relative amount of the various queueing outcomes is. In this report:
  - Each pie slice represents one queueing outcome.
  - A legend is available next to the chart to show the slice colors and their corresponding outcomes.
  - You can hover over each pie slice to see the label and/or value of that slice, as shown below:
  - Data grouping level settings do not influence the look or data.



Date display format

Using this setting, you can modify the way your date data is displayed in the report. See *Report settings on page 10* for more information.

Show filters and settings sumup

Selecting this checkbox shows you a sumup of all report details. See more in *Report settings on page 10*.

Data grouping levels

Up to three data grouping levels can be set up for the parameters in this report. Only the first (lowest) level is mandatory; the other grouping levels are optional and can be left unset. If unset, these data grouping levels will not be shown in the report.

The following parameters can be selected from dropdown lists and used as the data grouping levels in this report:

- **Agent (Agent ID)**: Agents' UserID without their full name.
- **Agent (Full user name)**: Agents' full (first and last) name, with their UserID in brackets.
- **Agent Group**: Name of the agent group.
- **Agent Analysis Group**: A grouping of agents used to facilitate analysis within the report. Independent of the 'Agent group' value.
- **Company**: Name of the company.
- **Contact center**: Name of the contact center.
- **Media type**: The type of media used for interactions in queues.
- **Queue (Queue ID)**: Alphanumerical ID of the queue.
- **Queue (Description)**: Description or descriptive name of the queue.
- **Queue Analysis Group**: A grouping of queues within the database designed to facilitate analysis within the report.
- **Required Skills**: Skills that were needed for a specific interaction (if applicable).
- **Skill Level**: The requested minimum knowledge level of a required skill.

- **Skill Released Flag**: Flag indicating if a skill has been released or preserved after queueing.
- **Year/Month/Day/Hour**: Time unit to be used as a grouping level.

> **Note**
> The totals in each row of this are not calculated through the sums of the details shown in the report, but instead take advantage of the different rows available in your DWH. This means that depending on your settings, the totals in the rows of your report may be higher or lower than the sum of the individual detail values below them. For more information on how a specific total is calculated, contact your System Administrator.

Standard views

Standard views are report views available to users by default. See more about them in *Standard Views on page 6*.

This report includes the following standard views:

- **Initial Skill Demand per Queue**: In this queue, you can see data about the way interactions behaved in your queues, specifically in the context of skills requested for the interactions.

Report values definition

Report values are part of the report itself and are shown once the report is generated. They are predefined and cannot be modified through the report settings and filters. In practical terms, report values are the columns shown in your report. Each metric shown in your report's columns is described below in more detail; explanations are also available on hover over the individual metrics in the report.

The list below shows **all the available metrics and KPIs** that could be used as columns in your report, but which will rarely all be used at the same time and in the same report. The actual metrics used in a report may vary based on your implementation and the use of **report views**, as created by the Report Designer. See *Report Views on page 4* for more information.

> **Caution**
> Some UI elements, such as tooltips and labels, can be customized to fit your team's or company's needs. However, if any customizations are applied, especially for the values presented in the table below, this document does **not** reflect them. The person/entity that created the customized content has the sole responsibility for informing all the users of their system about the customizations. Contact your system administrator for more information on your customizations.

The following report values are used in the Initial Skill Demand per Queue standard report:

Label	Tooltip
% Abandoned	The percentage of queued interactions that were abandoned by the contact while waiting to be handled by an agent, compared to the total number of all Queueings (all events where interactions were placed in a queue through any method and any number of times).

Label	Tooltip
% Dequeued	The percentage of interactions that were removed from a queue, compared to the total number of all Queueings (all events where interactions were placed in a queue through any method and any number of times).
% Dropped	The percentage of dropped interactions compared to the total number of all Queueings (all events where interactions were placed in a queue through any method and any number of times).
% Excluded From SL Evaluation	The percentage of interactions that were excluded from the Service Level, compared to the total number of all Queueings (interactions that were placed in a queue through any method and any number of times).
% First-Time Queued	The percentage of first-time queued interactions (which were queued for the first time in any queue), compared to the total number of all Queueings (all events where interactions were placed in a queue through any method and any number of times).
% Handled	The percentage of interactions that exited a queue to be handled by an agent, compared to the total number of all Queueings (all events where interactions were placed in a queue through any method and any number of times).
% Short Abandons	The percentage of all queued interactions that were abandoned by the contact within the configured Short abandons threshold, compared to the total number of interactions that were abandoned by the contacts.
% Short Conversations	The percentage of Short conversations, compared to the total number of all successfully handled online interactions. Offline interactions, such as those through email, are not included in this metric.
Abandoned	The total number of queued interactions that were abandoned by the contact while waiting to be handled by an agent.
Agent (Agent ID)	The unique identifying alphanumeric string of the agent that has been under supervision.
Agent Analysis Group	A grouping of agents within the database used to facilitate analysis within the report. Independent of the 'Agent group' value.
Avg Delay Time	Average time all interactions waited to interact with the self-service application. This includes all interactions and interaction outcomes included in the report settings and filters.
Avg External Activity Time	The average time an interaction has spent in the 'External activity' state. This is a state where, having finished communication with a contact (and the wrapup), the agent works on relevant data entry in the organization's application. The 'External activity' state comes after the 'Online/Offline activity' and 'Wrapup' (if applicable) states. This takes into account all queueings of interactions that were in this state.
Avg Offline Activity Time	The average time an interaction has spent in the 'Offline activity' state. In this state, agents are working on non-live interactions, such as communicating with contacts via email. This takes into account all queueings of interactions that were in this state.

Label	Tooltip
Avg Online Activity Time	The average time an interaction has spent in the 'Online activity' state. In this state, agents are actively working on a live interaction (such as participating in a call or having a conversation via chat). This takes into account all queueings of interactions that were in this state.
Avg Preserved Skill Level	The average skill level of the skills that were preserved after queueing interactions (not including released skills).
Avg Preserved Skills	The average number of preserved skills per interaction. Preserved skills are skills that have not been released by the system after the interaction has been queued.
Avg Released Skill Level	The average skill level of the skills that were released for interactions (not including preserved skills).
Avg Released Skills	The average number of released skills per interaction. If a skill is released, that usually means that an agent with the skill could not be found for an interaction and the skill was therefore no longer requested by the system. For example, if there is no agent available that matches a skill, after a certain wait time, the system automatically removes the skill to be able to assign the interaction to someone, as opposed for the contact just waiting until someone with that skill becomes available, if this is at all possible.
Avg Required Skills	The average number of required skills per interaction.
Avg Self-service Checkpoint Time	Average time interactions have spent interacting with each self-service checkpoint, based on self-service interactions started in the time range set up in the report settings.
Avg Self-service Path Length	Average number of checkpoints each interaction entered during its life cycle, including checkpoints entered when moving through multiple applications. This is calculated by dividing the total number of checkpoint entries with the total number of non-unique interactions.
Avg Self-service Time	Average time self-service interactions have spent time interacting with the self-service application. This refers to all interactions started in the time period defined in the report settings and filters.
Avg Skill Level	The average skill level of the initial requested skills for interactions (prior to releasing any skills).
Avg Time Before Abandon	The average time contacts spent waiting in queue to be handled by an agent before they abandoned the interaction.
Avg Wait Time	The average time an interaction spends waiting in a queue. The calculation is made based on all waiting times of all queued interactions (all Queueings), regardless of the outcome. If an interaction is moved from one queue to another or requeued, the waiting time is reset; all such restarted waiting times are also included in this calculation.
Avg Wait Time Before Handling	The average time a contact spent waiting in queue before their interaction was handled by an agent.

Label	Tooltip
Avg Wrapup Time	The average time an interaction has spent in the 'Wrapup' state. In this state, the agents, after finishing communication with a contact, set up the wrapup code of an interaction during postprocessing. This takes into account all queueings of interactions that were in this state.
Checkpoint entries	The total number of times that interactions have entered any checkpoint during their life-cycle, including all times a they entered checkpoints when moving through multiple applic-ations. If a checkpoint is entered multiple times by the same interaction, all the entries are included in this metric.
Contact Center	Contact center the agent is assigned to.
Delay Time	Total time all interactions waited to interact with the self-service application. This includes all interactions and interaction outcomes included in the report settings, filter and date and time range.
Dequeued	The total number of all queued interactions that were removed from a queue for reasons such as being moved to another resource (e.g. another queue or self-service application). Interactions that were dropped, abandoned (by the contact) or handled (by an agent) are not counted as dequeued interactions.
Dropped	The total number of queued interactions that were disconnected by the system, in cases such as all agents disconnecting when there are contacts still in queue or the wait time being too long, or due to a technical error. The causes for dropping a call by the system may vary based on your system settings.
Excluded From SL Evaluation	The number of interactions that are excluded from the Service Level Agreement, which means that they were not handled within the configured Service level threshold.
First-Time Queued	The total number of interactions that have been queued for the first time. Such inter-actions are considered new interactions, which have previously not been in any queue. If an interaction is requeued, it is not once again counted as a new interaction in the queue it was moved to.
Handled	The total number of interactions that exited the queue to be handled by an agent.
Max External Activity Time	The maximum time an interaction has spent in the 'External activity' state. This is a state where, having finished communication with a contact (and the wrapup), the agent works on relevant data entry in the organization's (external) application. The 'External activity' state comes after the 'Online/Offline activity' and 'Wrapup' (if applicable) states.The dis-played value is the longest single duration an interaction has spent in this state out of all queueings of interactions that were in this state. Note that if the same interaction is handled multiple times, each of the separate durations are counted individually, and are not summed up.
Max Offline Activity Time	The maximum time an interaction has spent in the 'Offline activity' state. This state includes interactions that are non-live, such as communicating with contacts via email. The displayed value is the longest single duration an interaction has spent in this state out of all queueings of interactions that were in this state. Note that if the same interaction is

Label	Tooltip
	handled multiple times, each of the separate durations are counted individually, and are not summed up.
Max Online Activity Time	The maximum time an interaction has spent in the 'Online activity' state. In this state, agents are actively working on a live interaction (such as participating in a call or having a conversation via chat). The displayed value is the longest single duration an interaction has spent in this state out of all queueings of interactions that were in this state. Note that if the same interaction is handled multiple times, each of the separate durations are counted individually, and are not summed up.
Max Self-service Path Length	Maximum number of checkpoints each interaction entered during its life cycle, including checkpoints entered when moving through multiple applications.
Max Skill Level	The maximum level of the required skills (if applicable).
Max Wait Time	The maximum time an interaction spends waiting in a queue. The calculation is made based on all waiting times of all queued interactions (all Queueings), regardless of the outcome. If an interaction is moved from one queue to another or requeued, the waiting time is reset; all such restarted waiting times are also included in this calculation.
Max Wrapup Time	The maximum time an interaction has spent in the 'Wrapup' state. In this state, the agents, after finishing communication with a contact, set up the wrapup code of an interaction during postprocessing. The displayed value is the longest single duration an interaction has spent in this state out of all queueings of interactions that were in this state. Note that if the same interaction is handled multiple times, each of the separate durations are counted individually, and are not summed up.
Media Type	The type of media, or communication channel, used for an interaction. This refers to the tools that the contact and agent or contact center used to communicate. Media types include, but are not limited to, emails, chat, telephone etc. The available types may vary based on your implementation.
Min Self-service Path Length	Minimum number of checkpoints each interaction entered during its life cycle, including checkpoints entered when moving through multiple applications.
Min Skill Level	The minimum level of the required skills (if applicable).
Queue (Queue ID)	Unique alphanumeric string identifier of the queue, without a description.
Queue Analysis Group	A grouping of queues within the database designed to facilitate analysis within the report.
Queueings	The total number of times, or events where interactions were placed in any queue through any of the methods available in your system. This includes interactions that were requeued, moved from another queue etc.
Required Skills	List of skills that were required for a specific interaction (if applicable). For example, 'French' could be a required skill, where the agent is required to know the language to be able to successfully complete the interaction.

Label	Tooltip
Self-service Interactions	The total number of interactions that entered the self-service application. If the same interaction enters multiple self-service applications, or the same application multiple times, all the instances are counted individually.
Self-service Time	Total time the interactions have spent time interacting with the self-service application. This refers to all interactions started in the time period defined in the report settings and filters.
Service Level	A service level is a percentage calculation showing how well standards are met for customer service. In this report, it refers to the percentage of interactions handled within the configured Service level threshold, compared to the total number of queued interactions. The Service level threshold is defined within the report itself, and it specifies the time in which an interaction needs to be handled to be considered within the Service level agreement. In other words, if an interaction is handled in a longer time than specified in by the Service level threshold, it does not comply with the service level. Short abandons and any interactions that were excluded from the service level by default are not considered queued interactions, and are therefore not included in this calculation.
Short Abandons	The total number of queued interactions that were abandoned by the contact within the configured Short abandons threshold (defined in report settings). The threshold refers to the time an interaction spent in the queue before it was abandoned by the contact.
Short Conversations	The total number of handled interactions that were handled by an agent within a configured threshold (Short conversations threshold). This threshold refers to the time between when both parties start an active and live conversation (online activity), for example when both the agent and the contact pick up the call, to the moment when the live conversation stops, for example when the contact hangs up.
Skill Released Flag	Flag indicating if a skill has been released, in case no agent could be found that has the required skill for the interaction.
Terminated by Application	The number of interactions that were closed by the self-service application, either because the interaction was dropped, or because it was handled.
Terminated by Contact	The number of interactions that were abandoned by the contact.
Transferred Interactions	The number of interactions that were transferred to a queue or any other resource, such as an agent, a service or an external number.
Unique Queued	The total number of times unique and distinct interactions were placed in a queue. For example, if a single interaction is queued multiple times, it is only counted as one unique queued interaction (with multiple queueings). The specific way unique queued interactions are counted depends on the level of aggregation your are using. You can find more details in the Queue Performance documentation.
Unique Self-service Interactions	The total number of unique interactions that entered the self-service application. If the same interaction enters multiple self-service applications, or the same application multiple times, all the instances are NOT counted individually and are considered the same interaction.

Outbound Campaigns

This standard report helps you see data about the performance of your outbound campaigns, and provides you with the most relevant metrics which enable you to assess the success of such campaigns.

The asset description is divided into chapters as shown below. In these chapters, you can find out what the goal of the asset is, which filters you can use for your data, how to set up your asset, which graphical elements you can use in it (if they are available), and, finally, what each metric refers to.

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Report parameters ***123***

Filters *123*

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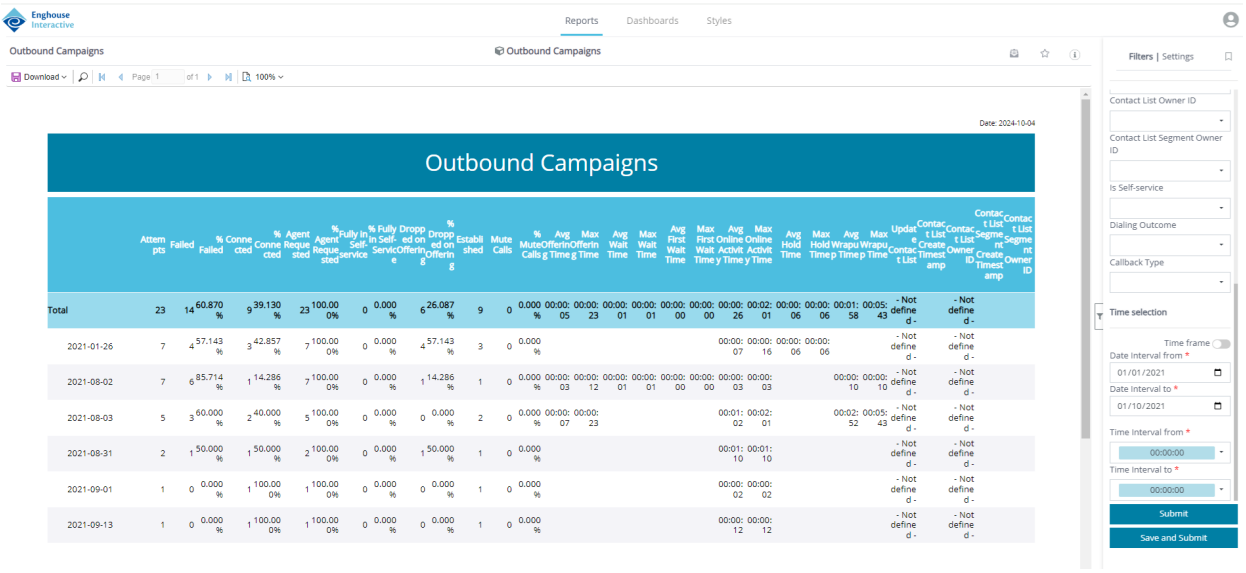


Objectives

The Outbound Campaigns base report allows its user to analyze in detail how their outbound campaigns performances are, and to see if there are any areas for improvement.

With the provided data, users can evaluate the quality of the contact lists used in outbound campaigns, and they can identify potential issues with outbound activities.

Finally, users of this report can see and analyze the most important KPIs about outbound activities.

Report parameters

> **Note**
> While Reporting Standard Reports can be implemented to many environments with little to no change, it is important to note that some settings, options and results may still vary based on your individual implementation, data and system settings. In case you have any questions, refer to your Administrator or Reporting contact.

Filters

You can use multiple filters for this report. From a list of available filters, select one or more values for which you want to see the data. For non-datetime filters, you can select all available values, search for specific values, or clear all selected values from the dropdown list. Mandatory filters are marked with *, while non-mandatory filters can be left empty, i.e., unset, in which case this filter will not influence the report.

Depending on the filter, the following options may be available in the dropdown filters along with the data from your data source:

- **- Not defined -**: Choosing this option includes the fields in your data source that have no (null) data.
- **- Not assigned -**: Selecting this option includes cases where an agent was not assigned to an interaction, such as for self-service interactions.

The following filters can be used for this report:

- **Company**: From the list of available companies, choose the companies that interactions were assigned to, and for which you want to see data.
- **Contact center**: Select the contact centers that interactions were assigned to, and whose data you want to analyze in the report.
- **Campaign class**: Define which campaign classes you want to filter your data by. A campaign class is a group of similar or related marketing campaigns with the same overarching goal or purpose. The list of campaign classes available here depends on your implementation.
- **Marketing campaign**: Select the individual campaigns you want to filter your data by. A (marketing) campaign is a group of outbound activities with the goal of advertising a service or product to contacts. Typically, this would be aimed at a specific set of contacts, such as first-time buyers, or contacts in a specific location, etc. The list of campaigns available here depends on your implementation.
- **Contact list**: Choose the relevant pre-made list of contacts and related information, loaded into the system to use for outbound campaigns.
- **Contact list segment**: Select a subset of the contact list, grouped by specific criteria, such as to be used for the same marketing campaign, in a specific contact center, or other purposes.
- **Dialing mode**: Define the dialing mode you want to filter your data by. A dialing mode refers to the way outbound interactions and campaigns are dialed. The options available below may vary based on your implementation. You can choose none, one or multiple of the following options:
    - **Predictive**: In this mode, based on existing call data, such as duration, dropout rate, etc., the system predicts the number of interactions that can be assigned to agents at a given time, and then initiates those interactions (calls) in advance, usually before the agents needed to handle these interactions are

available. When made available, the system then assigns an already dialed interaction to an agent. This system is typically used with a large number of contacts that need to be dialed in order to maximize efficiency.

    - **Preview**: In this mode, a system-predefined set of contact data is given to an available agent for a preview; based on information relevant for the interaction or campaign goal, the agent chooses whether to initiate the interaction. In this case, the agent also has more time to look over the interaction and prepare for it. This is typically used with a smaller number of contacts that need to be dialed. This method could be described as semi-manual.
    - **Progressive**: In this mode, when an agent becomes available, the system dials a number and provides the agent with information about the contact at the same time. This means that the agent has only a few moments to read about the contact before engaging in the interaction. However, this also means that the agent is only connected with interactions that have been checked by the dialer to actually reach a contact, as opposed to e.g. an answering machine.
    - **Manual**: In this mode, agents place outbound calls manually, typically by entering the contact number themselves or choosing a contact through the contact center system, as opposed to being assigned a contact by the system.
- **Media type**: From the dropdown list, select the specific media type(s) you want to filter your interactions by.
- **First self-service app.**: Choose from a list of self-service applications available in your system to select one or multiple names of your self-service applications that handled the interaction. Data will be filtered to show all interactions for which the selected applications were the first self-service applications to handle the interaction.
- **Agent ID**: From a list of available agents, select one or more agents for which you want to see the report data.
- **Contact List Owner ID**: From a list of available owners of contact lists, select one or more owners for which you want to see the report data.
- **Contact List Segment Owner ID**: From a list of available owners of contact list segments, select one or more owners for which you want to see the report data.
- **Is self-service**: Choose the starting point of the interaction:
    - **In self-service**: Interactions that started within a self-service application.
    - **By agent**: Interactions that started by attempting to interact with an agent directly.
- **Dialing outcome**: From the dropdown list, select the relevant dialing outcome(s) for which you want to see the data in your report. The list of available options here depends on your implementation.
- **Callback type**: Choose the relevant type of callback criteria for your interactions. The callback type refers to the outbound interactions that were a result of previous activity or a request from a contact.
    - The **Outbound** option is used to filter interactions that are simple outbound interactions with no callback requests or actions, while all the other options refer to various callback reasons (types). The options available here may vary based on your implementation.

Time selection

- **Date interval**: Choose the dates (interval) or relative time frame for the data. Switch between the Time frame and Interval mode by clicking the toggle just above the Date filter.

- **from - to**: Enter the **from** and **to** dates for your filter manually or select them from the dropdown menu.
- **Time frame**: Toggle the **Time frame** switch on to use the time frame mode. From the dropdown lists, choose the time unit (Days, Weeks, Months, Quarters or Years) and the relative time frame for your report.

- **Time interval (from and to)**: Choose the time interval in which the interactions you want to see started. From a list of full hours (24-hour format), choose the starting and ending hour to show your data in.

Settings

Time zone

With this setting, you can choose which time zone to view your data, filters and settings in. See *Report settings on page 10* for more information.

Duration display format

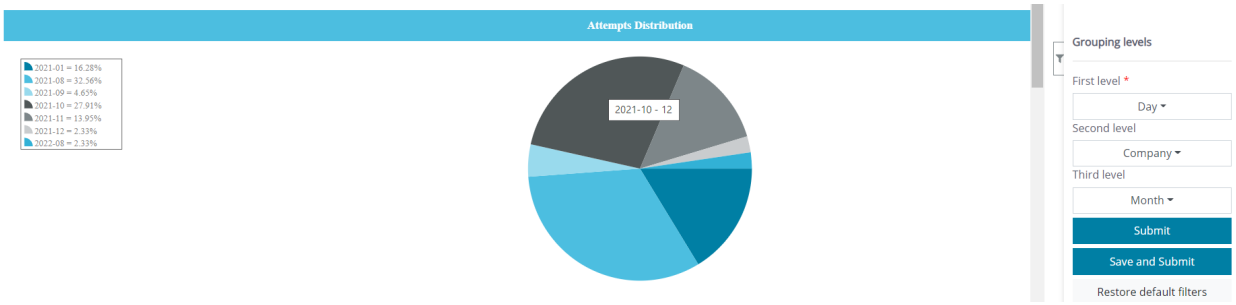
The **Duration display format** setting lets you define how you want to display the durations shown in your report. For more information, see this section.

Graphical elements

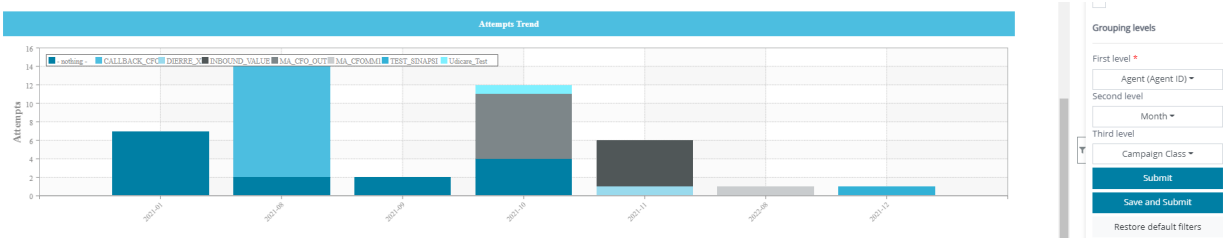
In this report, you can utilize various types of graphical elements to visualize your data. You can choose to use none of the graphical elements, one of them, or more of them at the same time. If you choose to use any of the graphical elements, they are placed at the top of the report and one under the other (if multiple are selected), as can be seen in the example in *Settings on page 10*.

The following graphical elements can be used with this report:

- **Pie chart**: This pie chart, titled "**Attempts Distribution**", shows the percentage ratio of the number of attempts made to establish an outbound interaction for each individual value of your highest set-up data grouping level. Overall:
  - Each pie slice represents one individual value of the highest data grouping level you set up in the report settings.
  - Only one data grouping level is used as the basis for this report. If multiple data grouping levels are set up, only the highest is used.
  - A legend is available on the left side of the graphical element which shows the individual values of the individual slices.
  - You can hover over each pie slice to see the absolute value of the slice (as visible below).
  - In the example below, you can see this pie chart and the data grouping level settings used to generate it. Even though multiple data grouping levels are set up, only the highest one is used for this chart. As "Month" is the highest set-up data grouping level, only that is used to generate this chart.



- **Bar chart**: The stacked bar chart titled "**Attempts Trend**" shows the number of attempts needed to establish an outbound interaction per each value of the highest or second-highest set-up data grouping level, depending on the settings. Hover over each bar to see the label and/or value of that bar. Overall:
  - This chart utilizes up to two data grouping levels. If one is used, there is no stacking in bars; if two (or more) are set-up, bars are stacked.
  - The X-Axis shows the individual values of the highest set-up data grouping level (if one grouping level is used) or the second-highest set-up data grouping level (if two or more grouping levels are used).
  - If two or more data grouping levels are set-up, the bars are stacked by the highest of the two used data grouping levels.
  - The Y-Axis always shows the number of attempts.
  - In the example below, you can see the stacked bar chart and the data grouping level settings used to generate it. In the settings, you can see that all three data grouping levels are set-up. However, only the highest two are used: "Month" as the second grouping level (and second-highest, in this case), used as the X-Axis value, showing one bar for each month, and "Campaign Class" as the third grouping level (and highest, in this case), used as the criteria to stack the individual bars.



Date display format

Using this setting, you can modify the way your date data is displayed in the report. See *Report settings on page 10* for more information.

Timestamp display format

By modifying this setting, you can choose how your timestamp data is displayed in the report. See *Report settings on page 10* for more information.

Show filters and settings sumup

Selecting this checkbox shows you a sumup of all report details. See more in *Report settings on page 10*.

Data grouping levels

Up to three data grouping levels can be set up for the parameters in this report. Only the first (lowest) level is mandatory; the other grouping levels are optional and can be left unset. If unset, these data grouping levels will not be shown in the report.

The following parameters can be selected from dropdown lists and used as the data grouping levels in this report:

- **Agent (Agent ID)**: Agents' UserID without their full name.
- **Agent info**: More information on the agent, such as the agents' full (first and last) name.
- **Company**: Name of the company.
- **Contact Center**: Name of the contact center.
- **Campaign Class**: The name of the campaign class. A campaign class is a group of similar or related marketing campaigns with the same overarching goal or purpose.
- **Marketing Campaign**: The name of the marketing campaign. A marketing campaign is a group of outbound activities with the goal of advertising a service or product to contacts.
- **Contact list**: Pre-made contact lists, loaded into the system to use for outbound campaigns.
- **Contact list segment**: Subsets of the contact list, grouped by specific criteria.
- **Dialing mode**: The way outbound interactions and campaigns are dialed
- **Dialing outcome**: The result of the outbound interaction dialing.
- **Media type**: The channel used by the agent to handle the interaction; examples include telephone, emails, chat etc.
- **Callback type**: The type of callback request.
- **First self-service app.**: The first application an interaction interacted with in self-service.
- **Is self-service**: A flag indicating if the outbound interaction starts with a self-service application, as opposed to starting by attempting to interact with an agent directly.
- **Year/Month/Day/Hour**: Time unit to be used as a grouping level.

Standard views

Standard views are report views available to users by default. See more about them in *Standard Views on page 6*.

This report includes the following standard views:

- **Outbound Campaigns**: This view offers information on the performed outboind campaigns, particularly when it comes to the success or failure rates, as well as the rates of the various campaign outcomes and times spent in certain states, such as on hold or in wrapup.

Report values definition

Report values are part of the report itself and are shown once the report is generated. They are predefined and cannot be modified through the report settings and filters. In practical terms, report values are the columns shown in your report. Each metric shown in your report's columns is described below in more detail; explanations are also available on hover over the individual metrics in the report.

The list below shows **all the available metrics and KPIs** that could be used as columns in your report, but which will rarely all be used at the same time and in the same report. The actual metrics used in a report may vary based on your implementation and the use of **report views**, as created by the Report Designer. See *Report Views on page 4* for more information.

> **Caution**
>
> Some UI elements, such as tooltips and labels, can be customized to fit your team's or company's needs. However, if any customizations are applied, especially for the values presented in the table below, this document does **not** reflect them. The person/entity that created the customized content has the sole responsibility for informing all the users of their system about the customizations. Contact your system administrator for more information on your customizations.

The following report values are used in the Outbound Campaigns standard report:

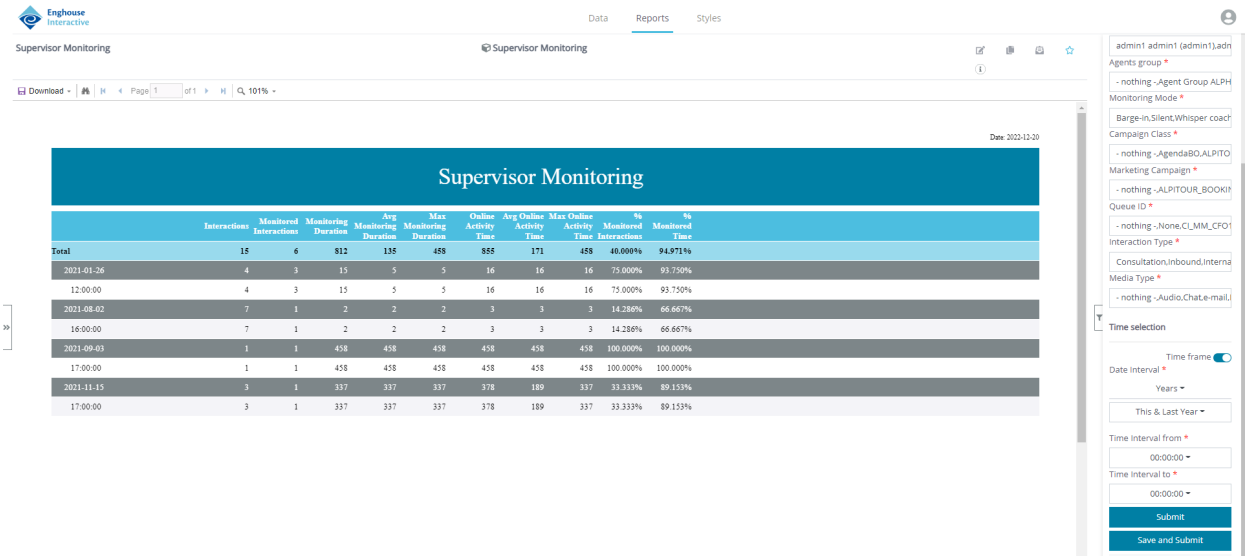
Label	Tooltip
Attempts	The number of attempts to establish an outbound interaction. All outbound interaction attempts, regardless of the interaction outcome, are included in this metric.
Failed	Number of interactions that did not reach the destination due to any error (busy, wrong phone number, timeout, ...)
% Failed	Percentage of 'Failed' interactions, compared to the total number of 'Attempts'.
Connected	Number of outbound interactions that connected with the target address, and then reached the target contact successfully (fax and voicemail are excluded).
% Connected	Percentage of 'Connected' interactions, compared to the total number of 'Attempts'.
Agent Requested	Number of interactions where there was a direct requirement for an agent to participate in the interaction (such as a contact requesting to talk to an agent).
% Agent requested	Percentage of 'Agent requested' interactions, compared to the total number of 'Connected' interactions.
Fully in Self-Service	Number of connected interactions that were handled in a self-service application in their entirety.
% Fully in Self-Service	Percentage of 'Fully in Self-Service' interactions, compared to the total number of 'Connected' interactions.
Dropped on Offering	Number of calls that have been dropped by the system during the 'Offering' state, due to, for example, connectivity issues. This metric applies only to the 'Telephone' media type.

Label	Tooltip
% Dropped on Offering	Percentage of 'Dropped on Offering' interactions, compared to the total number of 'Attempts'.
Established	Number of outbound interactions that reached the target address, and were then either connected with the contact successfully or dropped by the system on contact answer. This metric therefore includes 'Connected' interactions, as well as 'Mute calls'.
Mute Calls	Number of calls that have been dropped by the system after the contact has already answered the call. This metric applies only to the 'Telephone' media type.
% Mute Calls	Percentage of 'Mute Calls', compared to the total number of 'Established' interactions.
Avg Offering Time	The average time interactions spend in the 'Offering' state. In this state, the interaction has been initiated, but the participants are not connected or actively communicating yet.
Max Offering Time	The maximum time an interaction has spent in the 'Offering' state. In this state, the interaction has been initiated, but the participants are not connected or actively communicating yet.
Avg Wait Time	The average time interactions spend waiting in a queue for an agent to be available. All wait time values of an interaction are included in this calculation.
Max Wait Time	The maximum time an interaction has spent waiting in a queue for an agent to be available. This includes both the first time that an interaction is queued, as well as any other time the interaction had to wait in a queue (such as if it was requeued).
Avg First Wait Time	The average time interactions spend waiting in a queue for an agent to be available when the interaction was queued for the first time.
Max First Wait Time	The maximum time an interaction has spent waiting in a queue for an agent to be available, when the interaction was queued for the first time.
Avg Online Activity Time	The average time interactions spend in the 'Online activity' state. In this state, agents are actively handling an interaction, i.e. working on a live interaction (such as participating in a call or having a conversation via chat). This takes into account all queueings of interactions that were in this state.
Max Online Activity Time	The maximum time an interaction has spent in the 'Online activity' state. In this state, agents are actively handling an interaction, i.e. working on a live interaction (such as participating in a call or having a conversation via chat). The displayed value is the longest single duration an interaction has spent in this state out of all queueings of interactions that were in this state. Note that if the same interaction is handled multiple times, each of the separate durations are counted individually, and are not summed up.
Avg Hold Time	The average time agents have had an interaction put on hold.
Max Hold Time	The maximum time agents have had an interaction put on hold.
Avg Wrapup	The average time interactions spend in the 'Wrapup' state. In this state, after finishing an

Label	Tooltip
Time	interaction with a contact, the agents set up the wrapup code of the interaction during post-processing. This takes into account all queueings of interactions that were in this state.
Max Wrapup Time	The maximum time an interaction has spent in the 'Wrapup' state. In this state, after finishing an interaction with a contact, the agents set up the wrapup code of the interaction during postprocessing.
Update Contact List	The original contact list or the updated contact list that provides new or updated information about the contact. This value is omitted if there is an ambiguity in the values due to different sources.
Contact List Create Timestamp	The timestamp when the contacts list was created. This value is omitted if the value does not exist or if there is an ambiguity in the values due to different sources.
Contact List Owner ID	The owner of the contacts list. This value is omitted if the value does not exist or if there is an ambiguity in the values due to different sources.
Contact List Segment Create Timestamp	The timestamp when the contacts list segment was created. This value is omitted if the value does not exist or if there is an ambiguity in the values due to different sources.
Contact List Segment Owner ID	The owner of the contacts list segment. This value is omitted if the value does not exist or if there is an ambiguity in the values due to different sources.

Supervisor Monitoring

This standard report helps you gain insight into the supervisor monitoring activities in your contact center.



The asset description is divided into chapters as shown below. In these chapters, you can find out what the goal of the asset is, which filters you can use for your data, how to set up your asset, which graphical elements you can use in it (if they are available), and, finally, what each metric refers to.

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Objectives

The Supervisor Monitoring Standard Report was created to gain an overview of monitoring activities performed in your contact center.

With this report, you can quantify the performed monitoring activities and acquire a deeper understanding on what was done in this context. You can also verify the usage of monitoring activities and see which monitoring modes were employed.

Finally, this report can help you evaluate the results of such monitoring and coaching activities, helping you better understand what is being done and where potential areas for further improvement are.

Report parameters

> **Note**
> While Reporting Standard Reports can be implemented to many environments with little to no change, it is important to note that some settings, options and results may still vary based on your individual implementation, data and system settings. In case you have any questions, refer to your Administrator or Reporting contact.

Filters

You can use multiple filters for this report. From a list of available filters, select one or more values for which you want to see the data. For non-datetime filters, you can select all available values, search for specific values, or clear all selected values from the dropdown list. Mandatory filters are marked with *, while non-mandatory filters can be left empty, i.e., unset, in which case this filter will not influence the report.

Depending on the filter, the following options may be available in the dropdown filters along with the data from your data source:

- **- Not defined -**: Choosing this option includes the fields in your data source that have no (null) data.
- **- Not assigned -**: Selecting this option includes cases where an agent was not assigned to an interaction, such as for self-service interactions.

The following filters can be used for this report:

- **Company**: From the list of available companies, choose the companies that interactions were assigned to, and for which you want to see data.
- **Contact center**: Select the contact centers interactions were assigned to whose data you want to analyze in the report.
- **Supervisor ID**: From a list of available agents, select one or more supervisors for which you want to see the report data. The list shows the supervisors available for this report in your system.
- **Agent ID**: From a list of available agents, select one or more monitored agents for which you want to see the report data. The list shows the monitored agents available for this report in your system.
- **Agents group**: From the dropdown list, select the agents groups whose data you want to use for the report.
- **Monitoring mode**: Choose the method through which the monitoring activity was conducted by the supervisor. Examples include silent monitoring, whisper coaching or callbarging. The available options may vary based on your system.
- **Campaign class**: Choose the names of the campaign classes the interaction you want to analyze were a part of. A campaign class is a group of similar or related marketing campaigns with the same overarching goal or purpose.
- **Marketing campaign**: Select the names of the marketing campaigns that the interactions you want to analyze were a part of. A marketing campaign is a group of outbound activities with the goal of advertising a service or product to contacts.
- **Queue ID**: Choose the specific queue(s) whose data you want to use in the report.

- **Interaction type**: Choose the type of interaction you want to see the data for. You can select one, multiple, or all options. The interaction types are as follows:
  - **Consultation**: Interactions done within the call center where agents consult with other agents, supervisors etc. to resolve an issue.
  - **Outbound**: Interactions initiated by an agent and directed to a contact through any available media types.
  - **Inbound**: Interactions initiated by the contact and aimed at the contact center through any available media types.
  - **Internal**: Interactions initiated for internal contact center purposes (and not directed toward contacts).
- **Media type**: From the dropdown list, select the specific media type(s) you want to filter your interactions by. The list shows the media types available for this report in your system.

Time selection

- **Date interval**: Choose the dates (interval) or relative time frame for the data. Switch between the Time frame and Interval mode by clicking the toggle just above the Date filter.
  - **from - to**: Enter the **from** and **to** dates for your filter manually or select them from the dropdown menu.
  - **Time frame**: Toggle the **Time frame** switch on to use the time frame mode. From the dropdown lists, choose the time unit (Days, Weeks, Months, Quarters or Years) and the relative time frame for your report.
- **Time interval (from and to)**: Choose the time interval in which the interactions you want to see started. From a list of full hours (24-hour format), choose the starting and ending hour to show your data in.

Settings

Time zone

With this setting, you can choose which time zone to view your data, filters and settings in. See *Report settings on page 10* for more information.

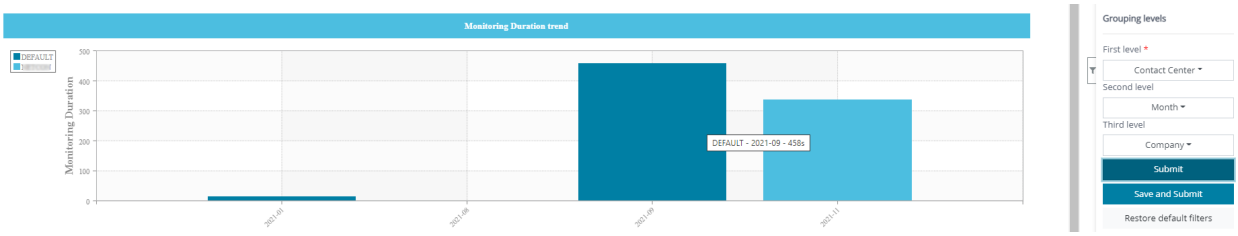
Graphical elements

In this report, you can utilize various types of graphical elements to visualize your data. You can choose to use none of the graphical elements, one of them, or more of them at the same time. If you choose to use any of the graphical elements, they are placed at the top of the report and one under the other (if multiple are selected), as can be seen in the example in *Settings on page 10*.

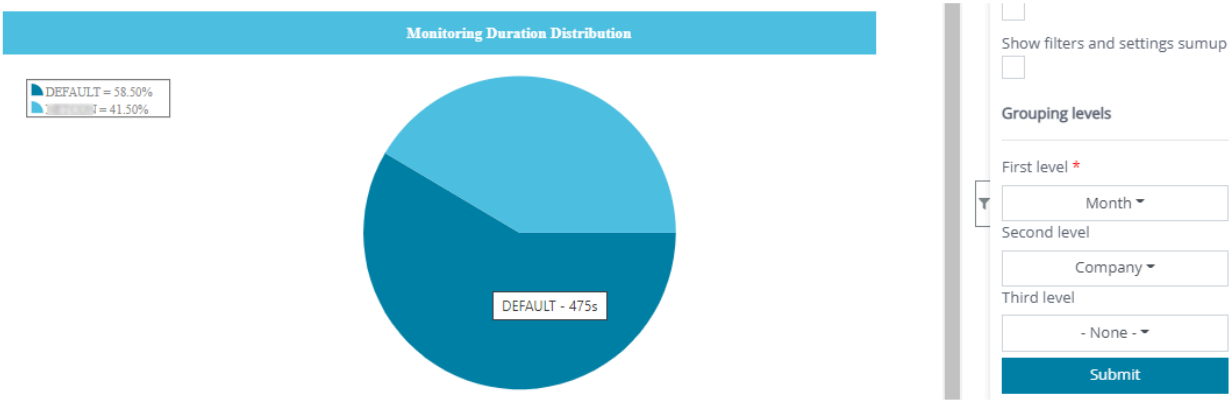
The following graphical elements can be used with this report:

- **Column chart**: The stacked column chart titled "**Monitoring Duration Trend**" shows the duration of monitoring activities (Y-Axis), distributed by the only or second-highest data grouping level (X-Axis) that you set up in your report settings. If you set up more than one data grouping level, the highest is used to stack the data on each bar. Overall:
  - The Y-Axis always shows the duration of monitoring activities in seconds.

- The X-Axis varies depending on what metric you set up as the second-highest (or only) data grouping level in your report.
- The bars can be stacked, and the criteria by which it is stacked is the highest data grouping level. This is only applicable if two or more data grouping levels are used in the report.
- Hover over each column segment to see the absolute value of the segment.
- The example below shows the column chart and the grouping levels used to set it up. Even though the first level uses the "Contact Center" value, this is not shown in the graphical element, as it only takes into account the two highest set-up levels, which here are "Month" for the second level (shown on the X-Axis as the individual columns) and "Company" for the third level (shown in the stacking of the columns and the chart legend).



- **Pie chart**: This pie chart, titled "**Monitoring Duration Distribution**", shows the percentage distribution of the duration of monitoring activities, based on the highest data grouping level you set up in the report, the time range you enter and other filters and settings. Hover over each pie slice to see the absolute value of the slice.
  - For example, if " Contact Center" is the highest set-up grouping level in your report (regardless of what the lower ones are, if there are any), you will see the percentage distribution of the duration of monitoring activities for each contact center (one pie slice per contact center), compared to the total duration of all monitoring activities in all contact centers.
  - Similarly, if "Month" is the highest set-up grouping level, you will see the percentage distribution of the duration of monitoring activities for each individual month (one pie slice per month), compared to the total duration of all monitoring activities within all months.
  - Below you can see an example of "Month" as the first data grouping level, and "Company" as the second, higher one. The pie chart uses only the highest set-up data grouping level, in this case, Company. In this chart, you can see what percentage of the total monitoring duration was done in which company.



Duration display format

The **Duration display format** setting lets you define how you want to display the durations shown in your report. For more information, see this section.

Show empty rows

Selecting this checkbox shows report rows (based on your data grouping levels) that do not contain any data. If this checkbox is left cleared, rows that do not contain any data are not shown, which may facilitate report use.

Date display format

Using this setting, you can modify the way your date data is displayed in the report. See *Report settings on page 10* for more information.

Show filters and settings sumup

Selecting this checkbox shows you a sumup of all report details. See more in *Report settings on page 10*.

Data grouping levels

Up to three data grouping levels can be set up for the parameters in this report. Only the first (lowest) level is mandatory; the other grouping levels are optional and can be left unset. If unset, these data grouping levels will not be shown in the report.

The following parameters can be selected from dropdown lists and used as the data grouping levels in this report:

- **Company**: Name of the company.
- **Contact Center**: Name of the contact center.
- **Campaign Class**: The name of the campaign class. A campaign class is a group of similar or related marketing campaigns with the same overarching goal or purpose.
- **Marketing Campaign**: The name of the marketing campaign. A marketing campaign is a group of outbound activities with the goal of advertising a service or product to contacts.
- **Agent (Agent ID)**: Agents' User ID without their full name.
- **Agent (Full agent name)**: Agents' full (first and last) name, with their User ID in brackets.
- **Agents Group**: Name of the agents group.
- **Interaction type**: The "direction" of the interaction; examples include inbound or outbound interactions.
- **Media type**: The channel used by the agent to handle the interaction; examples include telephone, emails, chat etc.
- **Monitoring mode**: The method of monitoring used in monitoring activities.
- **Supervisor (User ID)**: Supervisor's User ID without their full name.
- **Supervisor (User description)**: Description of the Supervisor user.
- **Queue (Queue ID)**: The ID of the queue without a description.

- **Queue (Queue Description)**: The (brief) description of the queue, if provided in your implementation.
- **Year/Month/Day/Hour**: Time unit to be used as a grouping level.

Report values definition

Report values are part of the report itself and are shown once the report is generated. They are predefined and cannot be modified through the report settings and filters. In practical terms, report values are the columns shown in your report. Each metric shown in your report's columns is described below in more detail; explanations are also available on hover over the individual metrics in the report.

The list below shows **all the available metrics and KPIs** that could be used as columns in your report, but which will rarely all be used at the same time and in the same report. The actual metrics used in a report may vary based on your implementation and the use of **report views**, as created by the Report Designer. See *Report Views on page 4* for more information.

> **Caution**
>
> Some UI elements, such as tooltips and labels, can be customized to fit your team's or company's needs. However, if any customizations are applied, especially for the values presented in the table below, this document does **not** reflect them. The person/entity that created the customized content has the sole responsibility for informing all the users of their system about the customizations. Contact your system administrator for more information on your customizations.

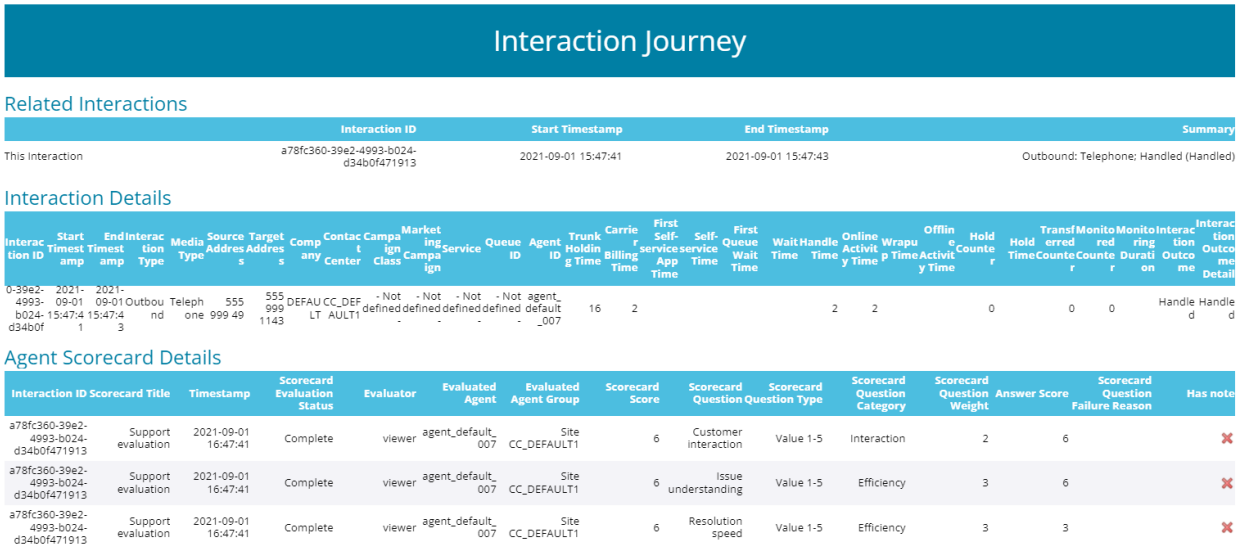
The following report values are used in the Supervisor Monitoring standard report:

Label	Tooltip
% Monitored Interactions	Percentage of interactions that were monitored, compared to the total number of handled interactions that meet the current filters and grouping level settings.
% Monitored Time	Percentage of monitored time in the online activity state, compared to the total time that the monitored activities have spent in the online activity state (including the time in this state that was not monitored).
Avg Monitoring Duration	The average duration of monitoring activities.
Avg Online Activity Time	The average time monitored interactions spend in the 'Online activity' state. In this state, agents are actively handling an interaction, i.e. working on a live interaction (such as participating in a call or having a conversation via chat).
Handled	The total number of interactions handled by agents.
Max Monitoring Duration	The maximum duration of monitoring activities. The displayed value is the longest single duration of a monitoring activity.
Max Online Activity Time	The maximum time an interaction has spent in the 'Online activity' state. In this state, agents are actively working on a live interaction (such as participating in a call or having a

Label	Tooltip
	conversation via chat). The displayed value is the longest single duration an interaction has spent in this state out of all queueings of interactions that were in this state. Note that if the same interaction is handled multiple times, each of the separate durations are counted individually, and are not summed up.
Monitored Interactions	Number of monitored interactions.
Monitoring Duration	Duration of the monitoring activity.
Online Activity Time	The total time an interaction has spent in the 'Online activity' state. In this state, agents are actively working on a live interaction (such as participating in a call or having a conversation via chat).

Interaction Journey

This standard report provides you and overview of interaction journey details per individual interaction.



Interaction Journey

Related Interactions

	Interaction ID	Start Timestamp	End Timestamp	Summary
This Interaction	a78fc360-39e2-4993-b024-d34b0f471913	2021-09-01 15:47:41	2021-09-01 15:47:43	Outbound: Telephone; Handled (Handled)

Interaction Details

Interaction ID	Start Timestamp	End Timestamp	Interaction Type	Media Type	Source Address	Target Address	Company	Contact Center	Campaign Class	Marketing Campaign	Service	Queue ID	Agent ID	Trunk Holding Time	Carrier Billing Time	First Self-service App Time	Self-service Time	First Queue Wait Time	Wait Time	Handle Time	Online Activity Time	Wrapup Time	Offline Activity Time	Hold Counter	Hold Time	Transferred Counter	Monitored Counter	Monitoring Duration	Interaction Outcome	Interaction Outcome Detail
0-39e2-4993-b024-d34b0f	2021-09-01 15:47:41	2021-09-01 15:47:43	Outbound	Telephone	555 999 49	555 999 1143	DEFAULT	CC_DEFAULT	- Not defined -	- Not defined -	- Not defined -	- Not defined -	agent_default_007	16	2					2	2			0		0	0		Handled	Handled

Agent Scorecard Details

Interaction ID	Scorecard Title	Timestamp	Scorecard Evaluation Status	Evaluator	Evaluated Agent	Evaluated Agent Group	Scorecard Score	Scorecard Question	Scorecard Question Type	Scorecard Question Category	Scorecard Question Weight	Answer Score	Scorecard Question Failure Reason	Has note
a78fc360-39e2-4993-b024-d34b0f471913	Support evaluation	2021-09-01 16:47:41	Complete	viewer	agent_default_007	Site CC_DEFAULT1	6	Customer interaction	Value 1-5	Interaction	2	6		✖
a78fc360-39e2-4993-b024-d34b0f471913	Support evaluation	2021-09-01 16:47:41	Complete	viewer	agent_default_007	Site CC_DEFAULT1	6	Issue understanding	Value 1-5	Efficiency	3	6		✖
a78fc360-39e2-4993-b024-d34b0f471913	Support evaluation	2021-09-01 16:47:41	Complete	viewer	agent_default_007	Site CC_DEFAULT1	6	Resolution speed	Value 1-5	Efficiency	3	3		✖

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Objectives

The goal of this report is to provide all the relevant details of an interaction and its life cycle within the same report. With this report, you can see the most important KPIs and other metrics for a specific interaction, all in

the same place, which facilitates your understanding of the report data.

This report allows you to understand the journey of an individual interaction, including all the steps from the initiation, to the duration of it, even to the evaluation survey conducted on it. This means that you can better understand the individual stages it goes through in order to better comprehend the performances and find out if there is room for further performance improvement.

This report should be usable for multiple environments with little or no need for adaptation.

Report parameters

> **Note**
>
> - While Reporting Standard Reports can be implemented to many environments with little to no change, it is important to note that some settings, options and results may still vary based on your individual implementation, data and system settings. In case you have any questions, refer to your Administrator or Reporting contact.
> - In this report, the reports pane (left) and parameters pane (right), as well as the top section (heading) **may be hidden by default**. Usually, this means that viewers cannot modify any of the parameters described below.

Filters

Typically, in this report, you can only set up one filter - the **Interaction ID**, the unique alphanumeric string identifier of an interaction. When you open this report by clicking an interaction in another standard report (where this option is enabled), this filter is automatically set up.

Settings

Time zone

With this setting, you can choose which time zone to view your data, filters and settings in. See *Report settings on page 10* for more information.

Report sections

From this dropdown menu, you can choose which report sections to display as part of the report. The individual values used in each column for each section are described in more detail below. The following options are available:

- **Checkpoints**: If there is self-service related data (i.e., if the interaction passed through self-service at any stage), you can see the most relevant self-service checkpoint details in this section.
- **Details**: A detailed table showing an overview of many interaction-related metrics. Based on whether you *Include related interactions on the next page*, this can show either just the selected interaction or also the related ones.

- **Events**: This section shows the individual steps and events that occurred during the selected interaction's life cycle. If *Include related interactions below* is checked, you will also see this data for any related interactions.
- **Overview**: An introductory overview with the most basic information about the interaction.
- **Related**: A table showing the interactions related to the selected one, such as related internal communication, monitoring, transfers etc. If *Include related interactions below* is cleared, this section will not be shown.
- **Scorecard**: A detail table showing the outcomes of the scorecard evaluation of the agent who conducted the interaction. The rows of the section show the individual scorecard questions.
- **Survey**: A detailed overview of information related to the evaluation survey conducted in relation to the selected interaction.

> **Note**
>
> - If you select a report section, but there is no data to be displayed in that section for the chosen interaction, the section will not be displayed.
> - If you do not select any individual value here, i.e., all the selections are cleared and the dropdown menu is set to None, all of the sections that contain any data are shown.

Duration display format

The **Duration display format** setting lets you define how you want to display the durations shown in your report. For more information, see this section.

Include related interactions

Related interactions are interactions that are in some way directly connected to the selected interaction, for example, consultations related to the interaction, transfers, etc.

If this checkbox is selected, all interactions related to the one defined in the filters will also be shown in other sections of the report, such as the Events section.

If it is cleared, related interactions will not be shown in any section of the report.

Timestamp display format

By modifying this setting, you can choose how your timestamp data is displayed in the report. See *Report settings on page 10* for more information.

Report values definition

Report values are part of the report itself and are shown once the report is generated. They are predefined and cannot be modified through the report settings and filters. In practical terms, report values are the columns shown in your report. Each metric shown in your report's columns is described below in more detail; explanations are also available on hover over the individual metrics in the report.

The list below shows **all the available metrics and KPIs** that could be used as columns in your report, but which will rarely all be used at the same time and in the same report. The actual metrics used in a report may

vary based on your implementation and the use of **report views**, as created by the Report Designer. See *Report Views on page 4* for more information.

> **Caution**
> Some UI elements, such as tooltips and labels, can be customized to fit your team's or company's needs. However, if any customizations are applied, especially for the values presented in the table below, this document does **not** reflect them. The person/entity that created the customized content has the sole responsibility for informing all the users of their system about the customizations. Contact your system administrator for more information on your customizations.

The values of this report are divided into the various sections that can be used within the report.

The following report values are used in the Interaction Journey standard report:

Overview

An introductory section that provides the basic information about the selected interaction.

Label	Tooltip
Interaction ID	Unique alphanumeric string identifier of an interaction.
Start Timestamp	The timestamp of when the interaction started. This refers to the moment the interaction was initiated and registered in the contact center, regardless of which channel the interaction was started through and what states and outcomes might occur later on. For example, this would refer to when an agent initiates a call (for outbound calls), when the customer sends in a chat request (for chat), when an email arrives in the contact center (for emails), or the contact center receives a call from a contact (for inbound calls).
Interaction Type	The type, or direction, of the interaction. This refers to the way contacts, i.e., interactions were initiated and connected with the system. This includes outbound (started by an agent and aimed at a contact), inbound (started by a contact and aimed at the contact center), and internal (for internal contact center purposes) interactions.
Media Type	The type of media, or communication channel, used for an interaction. This refers to the tools that the contact and agent or contact center used to communicate. Media types include, but are not limited to, emails, chat, telephone etc. The available types may vary based on your implementation.
Interaction Outcome	The result of the interaction with additional details about the outcome.
Source Address	The telephone number, email address or other source media identifier of the entity (contact or contact center / agent) that initiated the interaction. For example, for a call, the source address is the ANI.
Target Address	The telephone number, email address or other target media identifier of the entity (contact or contact center / agent) that received the interaction. For example, for a call, the target address is the DNIS.

Related Interactions

This section gives an overview of the selected interaction and all interactions related to the selected one. This includes relations such as, for example, monitoring activities on the interaction, callbacks or transfers.

Label	Tooltip
Interaction ID	Unique alphanumeric string identifier of an interaction.
Start Timestamp	The timestamp of when the interaction started. This refers to the moment the interaction was initiated and registered in the contact center, regardless of which channel the interaction was started through and what states and outcomes might occur later on. For example, this would refer to when an agent initiates a call (for outbound calls), when the customer sends in a chat request (for chat), when an email arrives in the contact center (for emails), or the contact center receives a call from a contact (for inbound calls).
End Timestamp	The timestamp of when the interaction was finished and wrapped up. This refers to the moment the interaction was resolved in the contact center, regardless of which channel the interaction was started through, what states it went through and what the outcome of the interaction is. For example, this would refer to when a call is finished (e.g., the contact hangs up and the agent completes the wrap-up), a chat interaction is finalized (e.g., contact leaves the chat and the agent completes the wrap-up) etc.
Summary	Short overview of the related interaction, including the type, user media type, and the interaction outcome.

Interaction Details

A detailed overview of the selected interaction and all the related interactions.

Label	Tooltip
Interaction ID	Unique alphanumeric string identifier of an interaction.
Start Timestamp	The timestamp of when the interaction started. This refers to the moment the interaction was initiated and registered in the contact center, regardless of which channel the interaction was started through and what states and outcomes might occur later on. For example, this would refer to when an agent initiates a call (for outbound calls), when the customer sends in a chat request (for chat), when an email arrives in the contact center (for emails), or the contact center receives a call from a contact (for inbound calls).
End Timestamp	The timestamp of when the interaction was finished and wrapped up. This refers to the moment the interaction was resolved in the contact center, regardless of which channel the interaction was started through, what states it went through and what the outcome of the interaction is. For example, this would refer to when a call is finished (e.g., the contact hangs up and the agent completes the wrap-up), a chat interaction is finalized (e.g., contact leaves the chat and the agent completes the wrap-up) etc.

Label	Tooltip
Interaction Type	The type, or direction, of the interaction. This refers to the way contacts, i.e. interactions were initiated and connected with the system. This includes outbound (started by an agent and aimed at a contact), inbound (started by a contact and aimed at the contact center), and internal (for internal contact center purposes) interactions.
Media Type	The type of media, or communication channel, used for an interaction. This refers to the tools that the contact and agent or contact center used to communicate. Media types include, but are not limited to, emails, chat, telephone etc. The available types may vary based on your implementation.
Source Address	The telephone number, email address or other source media identifier of the entity (contact or contact center / agent) that initiated the interaction. For example, for a call, the source address is the ANI.
Target Address	The telephone number, email address or other target media identifier of the entity (contact or contact center / agent) that received the interaction. For example, for a call, the target address is the DNIS.
Company	The company the interaction is assigned to.
Contact Center	The contact center the interaction is assigned to.
Campaign Class	The name of the campaign class the interaction was a part of. A campaign class is a group of similar or related marketing campaigns with the same overarching goal or purpose.
Marketing Campaign	The name of the marketing campaign the interaction was a part of. A marketing campaign is a group of outbound activities with the goal of advertising a service or product to contacts.
Service	The name of the service the interaction was a part of. A service is a grouping of queues and/or agents assigned to an application or following a specific, specialized workflow that defines how to handle interactions. Examples include a credit card service for a bank, a complaints service etc.
Queue ID	Unique alphanumeric string identifier of a queue.
Agent ID	The unique identifying alphanumeric string of the agent that handled the interaction. If multiple agents handled the same interaction, only the ID of the last agent that handled the interaction is shown.
Trunk Holding Time	The total time the interaction was taking up the trunk in order to resolve an interaction (such as an inbound call) by the agent. This includes all states where a phone line (trunk) is busy due to an undergoing interaction. The specific calculation for the trunk holding time may vary based on your implementation, but typically it includes all queue-related states, self-service, online activity etc.
Carrier Billing Time	The total time spent in an interaction that is billed by the network carrier. Typically, this is the time the interaction spent in a call (including waiting in queue, on hold and in an active conversation), after the call is picked up until it is hung up.
First Self-ser-	Total time the interactions have spent time interacting with the first self-service application

Label	Tooltip
vice App Time	they entered.
Self-Service Time	Total time the interactions have spent time interacting with the self-service application.
First Queue Wait Time	The total time the interaction spent waiting in the first queue it entered.
Wait Time	The total time the interaction spent waiting in a queue. If an interaction is requeued or moved to a different queue, the waiting time is reset. All wait time values are included in this calculation.
Handle Time	The total time the interaction has spent in the 'Handling' state. In this state, an agent is actively working on the interaction. The specific steps that are included in the 'Handling' state vary based on your implementation.
Online Activity Time	The total time an interaction has spent in the 'Online activity' state, in which an agent is actively involved in an interaction (for example, having a call or a chat conversation), including the time the interaction was on hold.
Wrapup Time	The total time the interaction has spent in the 'Wrapup' state. In this state, after finishing an interaction with a contact, the agents set up the wrapup code of the interaction during post-processing.
Offline Activity Time	The total time an interaction has spent in the 'Offline activity' state. This state includes interactions that are non-live, such as communicating with contacts via email. Note that if the same interaction is handled multiple times, each of the separate durations are counted individually, and are not summed up.
Hold Counter	The total number of times the related interaction was placed on hold.
Hold Time	The total time the interaction has spent in the 'On hold' state. In this state, the contact is placed on hold in situations such as if the agent needs to look up a solution. If an interaction is placed on hold multiple times, all the hold times are added up.
Transferred Counter	The total number of times the related interaction was transferred.
Monitored Counter	The total number of times monitoring activities were initiated over the related interaction.
Monitoring Duration	Duration of the monitoring activity.
Interaction Outcome	The result of the interaction. An interaction can either be handled by an agent or other resource, such as self-service, cut off by the contact, for example while still in queue (abandoned), or stopped by the system, for example because the waiting time is too long (dropped).
Interaction Outcome Detail	The result of the interaction with additional details about the outcome.

Interaction Events (History)

An overview of the events, or interaction-related steps, that occurred during the selected interaction's lifetime.

Label	Tooltip
Interaction ID	Unique alphanumeric string identifier of an interaction.
Event Timestamp	The timestamp of the interaction event.
Queue ID	Unique alphanumeric string identifier of a queue.
Agent ID	The unique identifying alphanumeric string of an agent handling interactions.
Interaction Event	The type of the interaction event that occurred, including (but not limited to) the interaction starting, being queued, entering self-service.
Interaction Status	The status of the interaction in relation to the given event.
Info	Additional information on the related interaction event, if available.

Checkpoint Details (Self-service)

A detailed overview of the checkpoints through which the selected interaction passed during its lifetime.

Label	Tooltip
Interaction ID	Unique alphanumeric string identifier of an interaction.
Self-service Application	Name of the self-service application or script.
Checkpoint Key	Unique alphanumeric string identifier of a self-service checkpoint.
Entry Timestamp	The timestamp of when the interaction entered the self-service checkpoint.
Checkpoint Type	Classification of the checkpoint. Examples include transit, transfer to queue, self-service abandon, out of working time, and other checkpoint types.
Self-service Checkpoint Time	Total time self-service interactions have spent interacting with self-service checkpoints.
Checkpoint Value	Value of the self-service checkpoint field; it can be empty if no data has been collected on the checkpoint.
Last Checkpoint	Flag set to true if the checkpoint is an interaction's last visited checkpoint.

Survey Details

A detailed overview of the evaluation survey related to the selected interaction.

Label	Tooltip
Interaction ID	Unique alphanumeric string identifier of the survey interaction.
Survey	List of questions that a contact uses for the purpose of evaluating an interaction with an agent or a service provided in a previous interaction.
Start Timestamp	The timestamp of when the survey interaction started. This refers to the moment the interaction was initiated and registered in the contact center, regardless of which channel the interaction was started through and what states and outcomes might occur later on.
Survey Evaluation Status	State of the evaluation process the survey is in, such as 'complete' if the survey has been completed fully, or 'refused' if a contact refused to take part in the survey. The stages of the process are predefined and vary based on your system.
Evaluated Agent	Agent that is being evaluated in the survey.
Survey Metric	The specified numerical measure that provides insight into the responses and behaviors of the participants, such as participant satisfaction, opinions, preferences, and other. Some common survey metrics include customer satisfaction score (CSAT), Customer Effort Score (CES), Net Promoter Score (NPS), etc.
Survey Score	The total answer score of the whole survey, as defined in the survey and in your system. The score varies based on multiple elements, such as the answer weight. For more information, contact your Administrator.
Survey Question	An individual question that was part of the survey.
Survey Answer	The survey question answer provided by survey participants, i.e., customers. This includes questions that were answered fully, questions that no answer was provided to, questions that had an error with the answer, etc.
Survey Question Weight	A coefficient assigned to a question, indicating the influence of the question on the average and reflecting its importance.

Agent Scorecard Details

A detail table showing the outcomes of the scorecard evaluation of the agent who conducted the interaction.

Label	Tooltip
Interaction ID	Unique alphanumeric string identifier of the interaction that was handled by the agent

Label	Tooltip
	evaluated in the scorecard.
Scorecard title	The name of the used scorecard.
Timestamp	The date and time of when the scorecard evaluation was submitted as complete.
Scorecard evaluation status	The status of the evaluation process that the scorecard is in.
Evaluator	The person responsible for evaluating the scorecard.
Evaluated agent	The agent that was evaluated in the scorecard.
Evaluated agent group	The agent group of the agent that was evaluated in the scorecard.
Scorecard score	The final score of the entire scorecard. This is calculated by taking into account the weight of the individual questions in the scorecard.
Scorecard question	An individual question that was part of the scorecard.
Scorecard question type	The format of the scorecard question, such as a flag, a value between 1 and 5, text entry, etc.
Scorecard question category	A grouping of scorecard questions that a question belongs to, based on certain topics, such as efficiency, interaction, etc. The available categories vary based on your system.
Scorecard question weight	A coefficient assigned to a question, indicating the influence of the question on the average and reflecting its importance.
Answer score	The individual scorecard question's answer score, given by the evaluator.
Scorecard question failure reason	The reason why the scorecard question was evaluated with a failing score.
Has note	A flag indicating whether the evaluator has attached a note to the individual answer.

Concurrent Agents

This is a report showing the maximum number of concurrent agents working across the metrics defined by the filters and settings you set up for the report.

The asset description is divided into chapters as shown below. In these chapters, you can find out what the goal of the asset is, which filters you can use for your data, how to set up your asset, which graphical elements you can use in it (if they are available), and, finally, what each metric refers to.

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Objectives

The goal of the Concurrent Agents Standard Report is to help contact center supervisors keep track of the agents and their activities in the contact center.

One of the main goals of this report is to allow supervisors to understand of the number of concurrent agents is near the maximum number of allowed agents, as defined through e.g. the license used by the contact center.

With the help of this report, supervisors can also optimize the agents' performance by identifying how agents' activities are distributed across various contact center segments, such as queues or campaigns. This also provides insight into other areas, for example, where additional resources or resource redistribution may be beneficial.

This report should be usable for multiple environments with little or no need for adaptation.

Report parameters

> **Note**
> While Reporting standard assets, such as standard reports, can be implemented to many environments with little to no change, it is important to note that some settings, options and results may still vary based on your individual implementation, data and system settings. In case you have any questions, refer to your Administrator or Reporting contact.

Filters

You can use multiple filters for this report. From a list of available filters, select one or more values for which you want to see the data. For non-datetime filters, you can select all available values, search for specific values,

or clear all selected values from the dropdown list. Mandatory filters are marked with *, while non-mandatory filters can be left empty, i.e., unset, in which case this filter will not influence the report.

Depending on the filter, the following options may be available in the dropdown filters along with the data from your data source:

- **- Not defined -**: Choosing this option includes the fields in your data source that have no (null) data.
- **- Not assigned -**: Selecting this option includes cases where an agent was not assigned to an interaction, such as for self-service interactions.

The following filters can be used for this report:

- **Company**: Choose the companies you want to see data for from the list of available companies.
- **Contact center**: Select the contact centers whose data you want to analyze in the report.
- **Campaign class**: Define which campaign classes you want to filter your data by. A campaign class is a group of similar or related marketing campaigns with the same overarching goal or purpose. The list of campaign classes available here depends on your implementation.
- **Marketing campaign**: Select the individual campaigns you want to filter your data by. A (marketing) campaign is a group of outbound activities with the goal of advertising a service or product to contacts. Typically, this would be aimed at a specific set of contacts, such as first-time buyers, or contacts in a specific location, etc. The list of campaigns available here depends on your implementation.
- **Queue ID**: From a list of available queue IDs, select one or more for which you want to see the report data. The list shows the queue IDs available for this report in your system.
- **Queue analysis group**: From the dropdown list, choose a grouping of queues within the database, based on shared criteria and intended to facilitate analysis within the report.

Time selection

- **Date interval**: Choose the dates (interval) or relative time frame for the data. Switch between the Time frame and Interval mode by clicking the toggle just above the Date filter.
  - **from - to**: Enter the **from** and **to** dates for your filter manually or select them from the dropdown menu.
  - **Time frame**: Toggle the **Time frame** switch on to use the time frame mode. From the dropdown lists, choose the time unit (Days, Weeks, Months, Quarters or Years) and the relative time frame for your report.
- **Time interval (from and to)**: Choose the time interval in which the interactions you want to see started. From a list of full hours (24-hour format), choose the starting and ending hour to show your data in.

Settings

Time zone

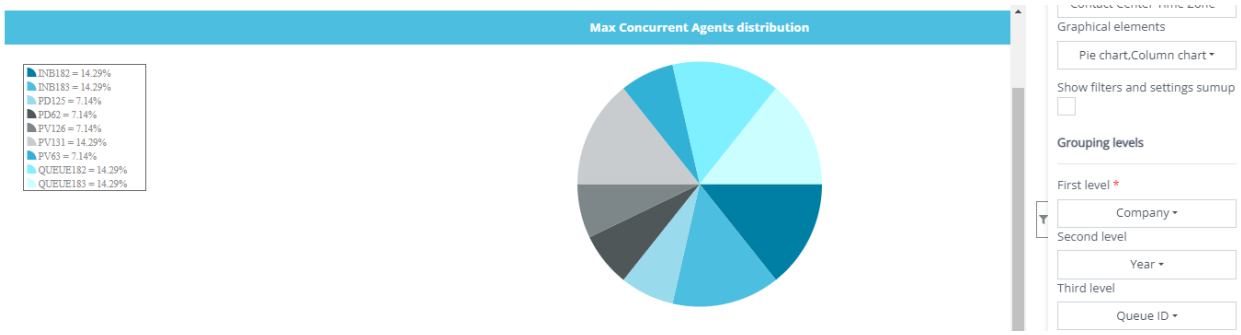
With this setting, you can choose which time zone to view your data, filters and settings in. See *Report settings on page 10* for more information.

Graphical elements

In this report, you can utilize various types of graphical elements to visualize your data. You can choose to use none of the graphical elements, one of them, or more of them at the same time. If you choose to use any of the graphical elements, they are placed at the top of the report and one under the other (if multiple are selected), as can be seen in the example in *Settings on page 10*.

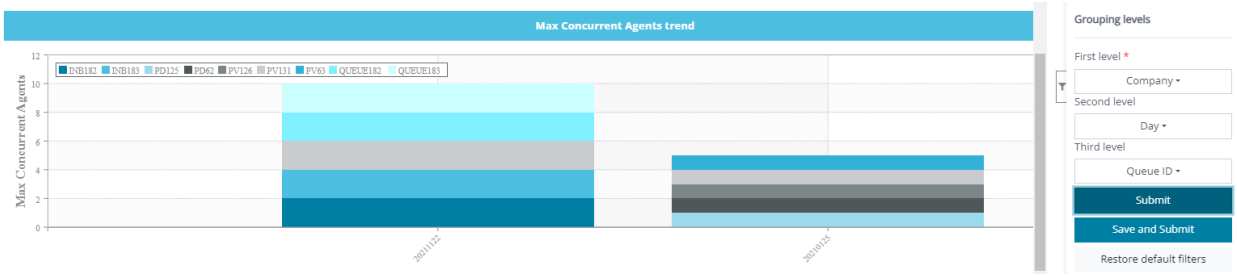
The following graphical elements can be used with this report:

- **Pie chart**: The pie chart titled **Max concurrent agents distribution** shows you the distribution of the maximum number of concurrent active agents across the highest set-up data grouping level field. Overall:
  - Each pie slice represents one individual value of the highest data grouping level you set up in the report settings.
  - Only one data grouping level is used as the basis for this report. If multiple data grouping levels are set up, only the highest is used.
  - A legend is available on the left side of the graphical element which shows the individual values of the individual slices.
  - You can hover over each pie slice to see the absolute value of the slice (as visible below).
  - In the example below, you can see this pie chart and the data grouping level settings used to generate it. Even though multiple data grouping levels are set up, only the highest one is used for this chart. As "Queue ID" is the highest set-up data grouping level, only that is used to generate this chart.



- **Column chart**: The stacked column chart titled **Max Concurrent Agents trend** shows the maximum number of concurrent agents per each value of the highest or second-highest set-up data grouping level, depending on the settings. Hover over each bar to see the label and/or value of that bar. Overall:
  - This chart utilizes up to two data grouping levels. If one is used, there is no stacking in bars; if two (or more) are set-up, bars are stacked.
  - The X-Axis shows the individual values of the only set-up data grouping level (if one grouping level is used) or the second-highest set-up data grouping level (if two or more grouping levels are used).
  - If two or more data grouping levels are set-up, the bars are stacked by the highest of them.
  - The Y-Axis always shows the maximum number of concurrent agents.
  - In the example below, you can see the stacked column chart and the data grouping level settings used to generate it. In the settings, you can see that all three data grouping levels are set-up. However, only the highest two are used: "Day" as the second grouping level (and second-highest, in this case), used as

the X-Axis value, showing one bar for each day, and "Queue ID" as the third grouping level (and highest, in this case), used as the criteria to stack the individual bars.



Date display format

Using this setting, you can modify the way your date data is displayed in the report. See *Report settings on page 10* for more information.

Show filters and settings sumup

Selecting this checkbox shows you a sumup of all report details. See more in *Report settings on page 10*.

Data grouping levels

Up to three data grouping levels can be set up for the parameters in this report. Only the first (lowest) level is mandatory; the other grouping levels are optional and can be left unset. If unset, these data grouping levels will not be shown in the report.

The following parameters can be selected from dropdown lists and used as the data grouping levels in this report:

- **Company**: Name of the company.
- **Contact Center**: Name of the contact center.
- **Campaign Class**: The name of the campaign class. A campaign class is a group of similar or related marketing campaigns with the same overarching goal or purpose.
- **Marketing Campaign**: The name of the marketing campaign. A marketing campaign is a group of outbound activities with the goal of advertising a service or product to contacts.
- **Queue ID**: Alphanumerical ID of the queue.
- **Queue Description**: Description or descriptive name of the queue.
- **Year/Month/Day/Hour**: Time unit to be used as a grouping level.

> **Note**
> The totals in each row of this are not calculated through the sums of the details shown in the report, but instead take advantage of the different rows available in your DWH. This means that depending on your settings, the totals in the rows of your report may be higher or lower than the sum of the individual detail values below them. For more information on how a specific total is calculated, contact your Administrator.

Report values definition

Report values are part of the report itself and are shown once the report is generated. They are predefined and cannot be modified through the report settings and filters. In practical terms, report values are the columns shown in your report. Each metric shown in your report's columns is described below in more detail; explanations are also available on hover over the individual metrics in the report.

The list below shows **all the available metrics and KPIs** that could be used as columns in your report, but which will rarely all be used at the same time and in the same report. The actual metrics used in a report may vary based on your implementation and the use of **report views**, as created by the Report Designer. See *Report Views on page 4* for more information.

> **Caution**
>
> Some UI elements, such as tooltips and labels, can be customized to fit your team's or company's needs. However, if any customizations are applied, especially for the values presented in the table below, this document does **not** reflect them. The person/entity that created the customized content has the sole responsibility for informing all the users of their system about the customizations. Contact your system administrator for more information on your customizations.

The Concurrent Agents standard report currently only uses the following report metric:

Max Concurrent Agents: The maximum number of agents that were concurrently, i.e., at the same time, logged in and working with interactions.

Survey Summary

This is a summary report showing you the most important high-level data related to the surveys conducted through your surveying activities.

The asset description is divided into chapters as shown below. In these chapters, you can find out what the goal of the asset is, which filters you can use for your data, how to set up your asset, which graphical elements you can use in it (if they are available), and, finally, what each metric refers to.

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Report parameters ... ***153***

Filters ... *153*

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Objectives

The goal of the Survey Summary Standard Report is to help contact center supervisors understand the outcomes of the surveys conducted in their contact centers.

This report provides valuable high-level insight into the answers received in surveys conducted with customers and contacts, enabling the report user to better understand the data and to utilize it to apply improvements where they may be needed.

This report should be usable for multiple environments with little or no need for adaptation.

Report parameters

> **Note**
> While Reporting standard assets, such as standard reports, can be implemented to many environments with little to no change, it is important to note that some settings, options and results may still vary based on your individual implementation, data and system settings. In case you have any questions, refer to your Administrator or Reporting contact.

Filters

You can use multiple filters for this report. From a list of available filters, select one or more values for which you want to see the data. For non-datetime filters, you can select all available values, search for specific values, or clear all selected values from the dropdown list. Mandatory filters are marked with *, while non-mandatory filters can be left empty, i.e., unset, in which case this filter will not influence the report.

Depending on the filter, the following options may be available in the dropdown filters along with the data from your data source:

- **- Not defined -**: Choosing this option includes the fields in your data source that have no (null) data.
- **- Not assigned -**: Selecting this option includes cases where an agent was not assigned to an interaction, such as for self-service interactions.

The following filters can be used for this report:

- **Company**: Choose the companies of the surveyed interactions that you want to see data for.
- **Contact center**: Select the contact centers of the surveyed interactions whose data you want to analyze in the report.
- **Campaign class**: Define which campaign classes of the surveyed interactions you want to filter your data by. A campaign class is a group of similar or related marketing campaigns with the same overarching goal or purpose. The list of campaign classes available here depends on your implementation.
- **Marketing campaign**: Select the individual campaigns of the surveyed interactions you want to filter your data by. A (marketing) campaign is a group of outbound activities with the goal of advertising a service or product to contacts. Typically, this would be aimed at a specific set of contacts, such as first-time buyers, or contacts in a specific location, etc. The list of campaigns available here depends on your implementation.
- **Evaluated agent**: Choose the agent evaluated in a survey that you want to use to filter your data.
- **Evaluated queue**: Choose the queue evaluated in a survey that you want to use to filter your data.
- **Agent group**: Choose the name of the group the agent belongs to.

Survey

- **Survey**: Choose which survey you want to analyze. A survey is a list of questions that a contact answers for the purpose of evaluating an interaction, an agent, a service, or other aspect of a contact center's activities.
- **Survey category**: Select a grouping of surveys based on a shared characteristic, as defined by your implementation.
- **Survey evaluation status**: From the dropdown list, choose which status of the survey evaluation process you want to filter your data by. The individual stages of the process are predefined and vary based on your system.
- **Survey metric**: From a list of specified options, choose the numerical measure that you want to filter your data by. Survey metrics are measures that provide insight into the responses and behaviors of the participants, such as participant satisfaction, opinions, preferences, and other. Some common survey metrics include customer satisfaction score (CSAT), Customer Effort Score (CES), Net Promoter Score (NPS), etc.

Time selection

- **Date interval**: Choose the dates (interval) or relative time frame for the data. Switch between the Time frame and Interval mode by clicking the toggle just above the Date filter.
  - **from - to**: Enter the **from** and **to** dates for your filter manually or select them from the dropdown menu.
  - **Time frame**: Toggle the **Time frame** switch on to use the time frame mode. From the dropdown lists, choose the time unit (Days, Weeks, Months, Quarters or Years) and the relative time frame for your report.

- **Time interval (from and to)**: Choose the time interval in which the interactions you want to see started. From a list of full hours (24-hour format), choose the starting and ending hour to show your data in.

> **Note**
> If no filters are chosen, as none of the filters are obligatory (as opposed to some of the settings), all the available data for all the filters is shown.

Settings

Time zone

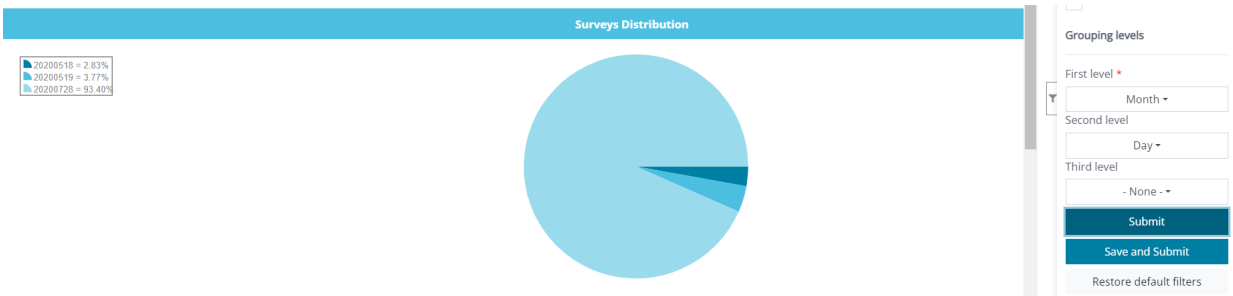
With this setting, you can choose which time zone to view your data, filters and settings in. See *Report settings on page 10* for more information.

Graphical elements

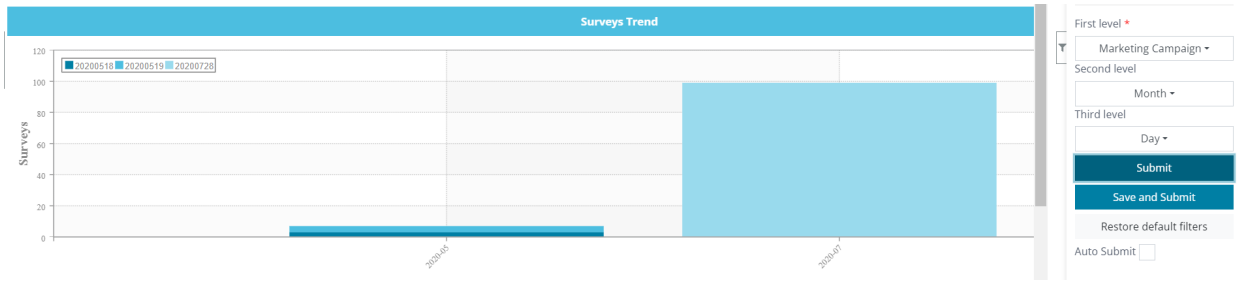
In this report, you can utilize various types of graphical elements to visualize your data. You can choose to use none of the graphical elements, one of them, or more of them at the same time. If you choose to use any of the graphical elements, they are placed at the top of the report and one under the other (if multiple are selected), as can be seen in the example in *Settings on page 10*.

The following graphical elements can be used with this report:

- **Pie chart**: The pie chart titled **Surveys Distribution** shows you the distribution of the number of conducted surveys, including completed surveys and those that were only partial or refused, across the highest set-up data grouping level field. Overall:
  - Each pie slice represents one individual value of the highest data grouping level you set up in the report settings.
  - Only one data grouping level is used as the basis for this report. If multiple data grouping levels are set up, only the highest is used.
  - A legend is available on the left side of the graphical element which shows the individual values of the individual slices.
  - You can hover over each pie slice to see the absolute value of the slice.
  - In the example below, you can see this pie chart and the data grouping level settings used to generate it. Even though multiple data grouping levels are set up, only the highest one is used for this chart. As "Day" is the highest set-up data grouping level, only that is used to generate this chart.



- **Column chart**: The stacked column chart titled **Surveys Trend** shows the number of conducted surveys, including completed surveys and those that were only partial or refused, per each value of the highest or second-highest set-up data grouping level, depending on the settings. Hover over each bar to see the label and/or value of that bar. Overall:
  - This chart utilizes up to two data grouping levels. If one is used, there is no stacking in bars; if two (or more) are set-up, bars are stacked.
  - The X-Axis shows the individual values of the only set-up data grouping level, if one grouping level is used, or the second-highest set-up data grouping level, if two or more grouping levels are used.
  - If two or more data grouping levels are set-up, the bars are stacked by the highest of them.
  - The Y-Axis always shows the number of surveys.
  - In the example below, you can see the stacked column chart and the data grouping level settings used to generate it. In the settings, you can see that all three data grouping levels are set-up. However, only the highest two are used: "Month" as the second grouping level (and second-highest, in this case), used as the X-Axis value, showing one bar for each month, and "Day" as the third grouping level (and highest, in this case), used as the criteria to stack the individual bars.



Date display format

Using this setting, you can modify the way your date data is displayed in the report. See *Report settings on page 10* for more information.

Show filters and settings sumup

Selecting this checkbox shows you a sumup of all report details. See more in *Report settings on page 10*.

Data grouping levels

Up to three data grouping levels can be set up for the parameters in this report. Only the first (lowest) level is mandatory; the other grouping levels are optional and can be left unset. If unset, these data grouping levels will not be shown in the report.

The following parameters can be selected from dropdown lists and used as the data grouping levels in this report:

- **Agent Group**: Name of the agent group.
- **Campaign Class**: The name of the campaign class. A campaign class is a group of similar or related marketing campaigns with the same overarching goal or purpose.

- **Company**: Name of the company.
- **Contact Center**: Name of the contact center.
- **Evaluated agent**: The agent who was evaluated in a survey.
- **Evaluated queue**: The queue that was evaluated in a survey.
- **Marketing Campaign**: The name of the marketing campaign. A marketing campaign is a group of outbound activities with the goal of advertising a service or product to contacts.
- **Survey**: The list of questions used by a contact to evaluate an interaction, an agent, a queue, or other aspect of their interaction.
- **Survey answer**: A survey answer, as provided by survey participants.
- **Survey answer score**: The system-defined score of the answer.
- **Survey category**: The category of a survey, as defined by your system.
- **Survey description**: A short description of the survey and its purpose.
- **Survey evaluation status**: The current status of the survey evaluation procedure.
- **Survey metric**: Measures that provide insight into the responses and behaviors of the participants, such as participant satisfaction, opinions, preferences, and other. Some common survey metrics include customer satisfaction score (CSAT), Customer Effort Score (CES), Net Promoter Score (NPS), etc.
- **Survey question**: An individual question that was part of a survey.
- **Survey question category**: The grouping that the survey belongs to based on certain topics, as defined by your system.
- **Survey question form**: The format of the survey question.
- **Year/Month/Day/Hour**: Time unit to be used as a grouping level.

> **Note**
>
> The totals in each row of this are not calculated through the sums of the details shown in the report, but instead take advantage of the different rows available in your DWH. This means that depending on your settings, the totals in the rows of your report may be higher or lower than the sum of the individual detail values below them.
>
> In this report specifically, if any answer-related values are used as data grouping levels, this may influence the totals rows. This is due to the fact that the aggregated total rows (i.e., data grouping level total rows) do not take into account survey questions where the answer was null, such as due to being skipped or not recorded because of a timeout or another error. However, the total of totals row is independent of this and also takes into account survey questions with no answer, potentially resulting in a higher total than the sum of the lower-level totals.

Report values definition

Report values are part of the report itself and are shown once the report is generated. They are predefined and cannot be modified through the report settings and filters. In practical terms, report values are the columns shown in your report. Each metric shown in your report's columns is described below in more detail; explanations are also available on hover over the individual metrics in the report.

The list below shows **all the available metrics and KPIs** that could be used as columns in your report, but which will rarely all be used at the same time and in the same report. The actual metrics used in a report may

vary based on your implementation and the use of **report views**, as created by the Report Designer. See *Report Views on page 4* for more information.

> **Caution**
> Some UI elements, such as tooltips and labels, can be customized to fit your team's or company's needs. However, if any customizations are applied, especially for the values presented in the table below, this document does **not** reflect them. The person/entity that created the customized content has the sole responsibility for informing all the users of their system about the customizations. Contact your system administrator for more information on your customizations.

The following report values are used in the Survey Summary standard report:

Label	Tooltip
Surveys	Total number of all the survey interactions, including those that were not answered fully, such as refused or partial surveys.
Refused	The total number of refused surveys. Refused surveys are surveys that were never started, and were declined by the contact.
Partial	The total number of partial surveys. Partial surveys are surveys that were started and have at least one answer, but were not fully completed.
Completed	The total number of fully completed surveys.
Evaluations	Total number of all the surveys that were started and had at least one answer, including partial and complete surveys.
Unique Users Evaluated	The number of unique users evaluated through the conducted survey activities.
Avg Survey Score	The average score of the survey(s) included by your report filters and settings.
Avg Answers Score	The average answer score of the answers that were part of the survey(s) included by your report filters and settings.
Survey Questions	The total number of distinct questions included in the survey.
% Refused	The percentage of refused surveys compared to the total number of surveys.
% Partial	The percentage of partial surveys compared to the total number of surveys.
% Completed	The percentage of fully completed surveys compared to the total number of surveys.
% Evaluations	The percentage of evaluations (partial + completed surveys), compared to the total number of surveys.
Answers	Total number of all answers collected through the surveys. This also includes timed out answers or answers with errors.
Scored Answers	Total number of scored answers received through the surveys. This does not include timed

Label	Tooltip
	out answers or answers with errors.
% Answers on 2nd GL	The percentage of answers collected through the surveys (‘Answers’ column), compared to the total number of answers on the second grouping level, as defined in your report.
% Answers on 3rd GL	The percentage of answers collected through the surveys (‘Answers’ column), compared to the total number of answers on the third grouping level, as defined in your report.
% Answers on Total	The percentage of answers collected through the surveys (‘Answers’ column) based on the first grouping level, compared to the total number of answers of the whole report. The total answers value is shown in the ‘Total’ row of the report.
% Scored Answers on 2nd GL	The percentage of scored answers received through the surveys (‘Scored Answers’ column), compared to the total number of scored answers on the second grouping level, as defined in your report.
% Scored Answers on 3rd GL	The percentage of scored answers received through the surveys (‘Scored Answers’ column), compared to the total number of scored answers on the third grouping level, as defined in your report.
% Scored Answers on Total	The percentage of scored answers received through the surveys (‘Scored Answers’ column) based on the first grouping level, compared to the total number of scored answers of the report. The total scored answers value is shown in the ‘Total’ row of the report.

Survey Detail

This is a detail report showing you the most important lower-level data related to the surveys conducted through your surveying activities.

The asset description is divided into chapters as shown below. In these chapters, you can find out what the goal of the asset is, which filters you can use for your data, how to set up your asset, which graphical elements you can use in it (if they are available), and, finally, what each metric refers to.

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Report parameters ... ***160***

Filters ... *160*

Settings ... *162*

Report values definition ... ***162***

Objectives

The goal of the Survey Detail Standard Report is to help contact center supervisors understand the outcomes of the surveys conducted in their contact centers.

This report provides valuable detailed insight into the answers received in surveys conducted with customers and contacts, enabling the report user to better understand the data and to utilize it to apply improvements where they may be needed.

This report should be usable for multiple environments with little or no need for adaptation.

Report parameters

> **Note**
> While Reporting standard assets, such as standard reports, can be implemented to many environments with little to no change, it is important to note that some settings, options and results may still vary based on your individual implementation, data and system settings. In case you have any questions, refer to your Administrator or Reporting contact.

Filters

You can use multiple filters for this report. From a list of available filters, select one or more values for which you want to see the data. For non-datetime filters, you can select all available values, search for specific values, or clear all selected values from the dropdown list. Mandatory filters are marked with *, while non-mandatory filters can be left empty, i.e., unset, in which case this filter will not influence the report.

Depending on the filter, the following options may be available in the dropdown filters along with the data from your data source:

- **- Not defined -**: Choosing this option includes the fields in your data source that have no (null) data.
- **- Not assigned -**: Selecting this option includes cases where an agent was not assigned to an interaction, such as for self-service interactions.

The following filters can be used for this report:

- **Company**: Choose the companies of the surveyed interactions that you want to see data for.
- **Contact center**: Select the contact centers of the surveyed interactions whose data you want to analyze in the report.
- **Campaign class**: Define which campaign classes of the surveyed interactions you want to filter your data by. A campaign class is a group of similar or related marketing campaigns with the same overarching goal or purpose. The list of campaign classes available here depends on your implementation.
- **Marketing campaign**: Select the individual campaigns of the surveyed interactions you want to filter your data by. A (marketing) campaign is a group of outbound activities with the goal of advertising a service or product to contacts. Typically, this would be aimed at a specific set of contacts, such as first-time buyers, or contacts in a specific location, etc. The list of campaigns available here depends on your implementation.
- **Evaluated agent**: Choose the agent evaluated in a survey that you want to use to filter your data.
- **Evaluated queue**: Choose the queue evaluated in a survey that you want to use to filter your data.
- **Agent group**: Choose the name of the group the agent belongs to.

Survey

- **Survey**: Choose which survey you want to analyze. A survey is a list of questions that a contact answers for the purpose of evaluating an interaction, an agent, a service, or other aspect of a contact center's activities.
- **Survey category**: Select a grouping of surveys based on a shared characteristic, as defined by your implementation.
- **Survey evaluation status**: From the dropdown list, choose which status of the survey evaluation process you want to filter your data by. The individual stages of the process are predefined and vary based on your system.
- **Survey metric**: From a list of specified options, choose the numerical measure that you want to filter your data by. Survey metrics are measures that provide insight into the responses and behaviors of the participants, such as participant satisfaction, opinions, preferences, and other. Some common survey metrics include customer satisfaction score (CSAT), Customer Effort Score (CES), Net Promoter Score (NPS), etc.

Time selection

- **Date interval**: Choose the dates (interval) or relative time frame for the data. Switch between the Time frame and Interval mode by clicking the toggle just above the Date filter.
  - **from - to**: Enter the **from** and **to** dates for your filter manually or select them from the dropdown menu.
  - **Time frame**: Toggle the **Time frame** switch on to use the time frame mode. From the dropdown lists, choose the time unit (Days, Weeks, Months, Quarters or Years) and the relative time frame for your report.

- **Time interval (from and to)**: Choose the time interval in which the interactions you want to see started. From a list of full hours (24-hour format), choose the starting and ending hour to show your data in.

> **Note**
> If no filters are chosen, as none of the filters are obligatory (as opposed to some of the settings), all the available data for all the filters is shown.

Settings

Time zone

With this setting, you can choose which time zone to view your data, filters and settings in. See *Report settings on page 10* for more information.

Date display format

Using this setting, you can modify the way your date data is displayed in the report. See *Report settings on page 10* for more information.

Timestamp display format

By modifying this setting, you can choose how your timestamp data is displayed in the report. See *Report settings on page 10* for more information.

Show filters and settings sumup

Selecting this checkbox shows you a sumup of all report details. See more in *Report settings on page 10*.

Interaction Journey Report UUID

Enter the UUID of the detail report that you want to open when you click an interaction in the report. See more in *Master-Detail report relationships on page 15*.

Report values definition

Report values are part of the report itself and are shown once the report is generated. They are predefined and cannot be modified through the report settings and filters. In practical terms, report values are the columns shown in your report. Each metric shown in your report's columns is described below in more detail; explanations are also available on hover over the individual metrics in the report.

The list below shows **all the available metrics and KPIs** that could be used as columns in your report, but which will rarely all be used at the same time and in the same report. The actual metrics used in a report may vary based on your implementation and the use of **report views**, as created by the Report Designer. See *Report Views on page 4* for more information.

Caution

Some UI elements, such as tooltips and labels, can be customized to fit your team's or company's needs. However, if any customizations are applied, especially for the values presented in the table below, this document does **not** reflect them. The person/entity that created the customized content has the sole responsibility for informing all the users of their system about the customizations. Contact your system administrator for more information on your customizations.

The following report values are used in the Survey Detail standard report:

Label	Description
Survey	List of questions that a contact answers for the purpose of evaluating an interaction with an agent or a service provided in a previous interaction.
Survey Category	A grouping of surveys, as defined by your system, for example: product evaluations, agent evaluations, etc.
Survey Evaluation Status	State of the evaluation process the survey is in, such as 'complete' if the survey has been completed fully, or 'refused' if a contact refused to take part in the survey. The stages of the process are predefined and vary based on your system.
Start Timestamp	The timestamp of when the survey interaction started. This refers to the moment the interaction was initiated and registered in the contact center, regardless of which channel the interaction was started through and what states and outcomes might occur later on.
Campaign Class	The name of the campaign class the evaluated interaction was a part of. A campaign class is a group of similar or related marketing campaigns with the same overarching goal or purpose.
Marketing Campaign	The name of the marketing campaign the evaluated interaction was a part of. A marketing campaign is a group of outbound activities with the goal of advertising a service or product to contacts.
Evaluated Agent	Agent that is being evaluated in the survey.
Company	The company the evaluated interaction is assigned to.
Contact Center	Contact center the evaluated interaction is assigned to.
Evaluated Queue	The queue that is being evaluated in the survey.
Agent Group	The agent group of the evaluated agent.
Survey Questions	The total number of distinct questions included in the survey.
Proposed Questions	The total number of questions from the survey offered to the contact.
Answered Questions	The total number of questions from the survey that the contact successfully answered.

Label	Description
Survey Score	The total answer score of the whole survey, as defined in the survey and in your system. The score varies based on multiple elements, such as the answer weight. For more information, contact your Administrator.

Survey Answers Detail

This is a detail report showing you the most important data related to the survey answers collected through surveying activities.

The asset description is divided into chapters as shown below. In these chapters, you can find out what the goal of the asset is, which filters you can use for your data, how to set up your asset, which graphical elements you can use in it (if they are available), and, finally, what each metric refers to.

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Report Filters & Settings ... ***165***

Filters ... *165*

Settings ... *167*

Report values definition ... ***168***

Report objectives

The goal of the Survey Answers Detail Standard Report is to help contact center supervisors understand the results of the surveys conducted in their contact centers by providing a detailed look at them.

This report provides valuable insight into the answers received in surveys conducted with customers and contacts, enabling the viewer to better understand the data and to utilize it to apply improvements where they may be needed.

This report should be usable for multiple environments with little or no need for adaptation.

Report Filters & Settings

> **Note**
> While Reporting standard assets, such as standard reports, can be implemented to many environments with little to no change, it is important to note that some settings, options and results may still vary based on your individual implementation, data and system settings. In case you have any questions, refer to your Administrator or Reporting contact.

Filters

You can use multiple filters for this report. From a list of available filters, select one or more values for which you want to see the data. For non-datetime filters, you can select all available values, search for specific values, or clear all selected values from the dropdown list. Mandatory filters are marked with *, while non-mandatory filters can be left empty, i.e., unset, in which case this filter will not influence the report.

Depending on the filter, the following options may be available in the dropdown filters along with the data from your data source:

- **- Not defined -**: Choosing this option includes the fields in your data source that have no (null) data.
- **- Not assigned -**: Selecting this option includes cases where an agent was not assigned to an interaction, such as for self-service interactions.

The following filters can be used for this report:

- **Company**: Choose the companies you want to see data for from the list of available companies.
- **Contact center**: Select the contact centers whose data you want to analyze in the report.
- **Campaign Class**: Define which campaign classes you want to filter your data by. A campaign class is a group of similar or related marketing campaigns with the same overarching goal or purpose. The list of campaign classes available here depends on your implementation.
- **Marketing Campaign**: Select the individual campaigns you want to filter your data by. A (marketing) campaign is a group of outbound activities with the goal of advertising a service or product to contacts. Typically, this would be aimed at a specific set of contacts, such as first-time buyers, or contacts in a specific location, etc. The list of campaigns available here depends on your implementation.
- **Evaluated agent**: Choose the agent evaluated in a survey that you want to use to filter your data.
- **Evaluated queue**: Choose the queue that was evaluated in the survey to filter your data.
- **Agent group**: From the dropdown list, select the agent group of the evaluated agent whose data you want to use for the report.

> **Note**
> Typically, filters and settings such as the Campaign Class or Company refer to the interaction that is being evaluated by the survey. However, in some cases and in specific implementations, they may refer to the survey itself. If you are not sure how this is set up in your system, refer to your Administrator.

Survey

- **Survey**: Choose which survey you want to analyze. A survey is a list of questions that a contact answers for the purpose of evaluating an interaction, an agent, a service, or other aspect of a contact center's activities.
- **Survey category**: Select a grouping of surveys based on a shared characteristic, as defined by your implementation.
- **Survey evaluation status**: From the dropdown list, choose which status of the survey evaluation process you want to filter your data by. The individual stages of the process are predefined and vary based on your system.
- **Survey metric**: From a list of specified options, choose the numerical measure that you want to filter your data by. Survey metrics are measures that provide insight into the responses and behaviors of the participants, such as participant satisfaction, opinions, preferences, and other. Some common survey metrics include customer satisfaction score (CSAT), Customer Effort Score (CES), Net Promoter Score (NPS), etc.
- **Survey question**: Choose an individual question that was part of the survey.
- **Threshold question**: Select the survey question that the Threshold Answer refers to.
- **Threshold answer**: Enter a value for the answer threshold. With this threshold, you define the numerical value that the answer value of the "Threshold Question" must be equal to or lower than in order to be shown in the report. The value entered here must be an integer and relevant in the context of the question - if anything else is entered, the filter will not be applied.

Time selection

- **Date interval**: Choose the dates (interval) or relative time frame for the data. Switch between the Time frame and Interval mode by clicking the toggle just above the Date filter.
  - **from - to**: Enter the **from** and **to** dates for your filter manually or select them from the dropdown menu.
  - **Time frame**: Toggle the **Time frame** switch on to use the time frame mode. From the dropdown lists, choose the time unit (Days, Weeks, Months, Quarters or Years) and the relative time frame for your report.
- **Time interval (from and to)**: Choose the time interval in which the interactions you want to see started. From a list of full hours (24-hour format), choose the starting and ending hour to show your data in.

> **Note**
> If no filters are chosen, as none of the filters are obligatory (as opposed to some of the settings), all the available data for all the filters is shown.

Settings

Time zone

With this setting, you can choose which time zone to view your data, filters and settings in. See *Report settings on page 10* for more information.

Duration display format

The **Duration display format** setting lets you define how you want to display the durations shown in your report. For more information, see this section.

Timestamp display format

By modifying this setting, you can choose how your timestamp data is displayed in the report. See *Report settings on page 10* for more information.

Show filters and settings sumup

Selecting this checkbox shows you a sumup of all report details. See more in *Report settings on page 10*.

Interaction Journey Report UUID

Enter the UUID of the detail report that you want to open when you click an interaction in the report. See more in *Master-Detail report relationships on page 15*.

Report values definition

Report values are part of the report itself and are shown once the report is generated. They are predefined and cannot be modified through the report settings and filters. In practical terms, report values are the columns shown in your report. Each metric shown in your report's columns is described below in more detail; explanations are also available on hover over the individual metrics in the report.

The list below shows **all the available metrics and KPIs** that could be used as columns in your report, but which will rarely all be used at the same time and in the same report. The actual metrics used in a report may vary based on your implementation and the use of **report views**, as created by the Report Designer. See *Report Views on page 4* for more information.

> **Caution**
>
> Some UI elements, such as tooltips and labels, can be customized to fit your team's or company's needs. However, if any customizations are applied, especially for the values presented in the table below, this document does **not** reflect them. The person/entity that created the customized content has the sole responsibility for informing all the users of their system about the customizations. Contact your system administrator for more information on your customizations.

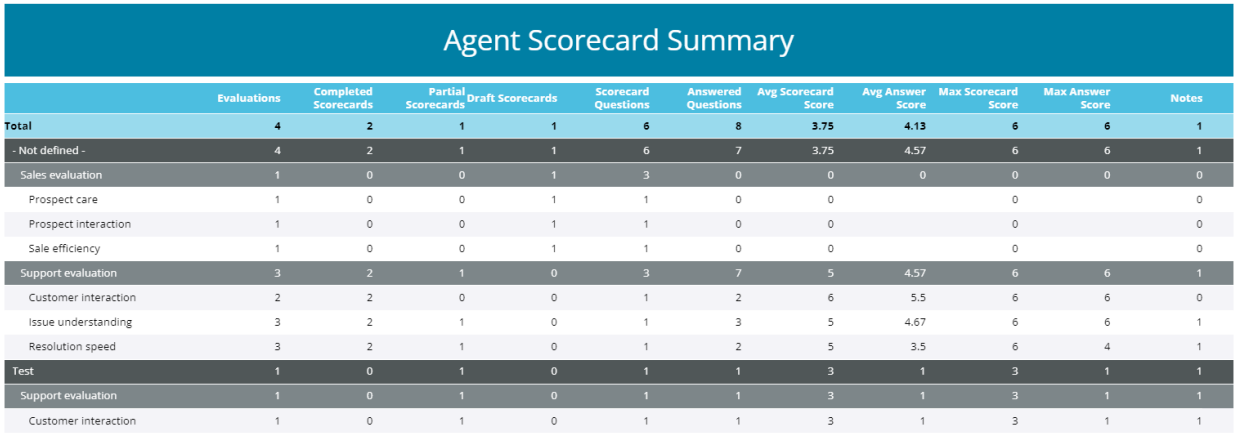
The following report values are used in the Survey Answers Detail standard report:

Label	Description
Survey Interaction ID	Unique alphanumeric string identifier of the interaction during which the survey was conducted.
Evaluated Interaction ID	Unique alphanumeric string identifier of the interaction that was evaluated by the contact in the survey.
Survey	List of questions that a contact answers for the purpose of evaluating an interaction with an agent or a service provided in a previous interaction.
Survey Category	A grouping of surveys, as defined by your system, for example: product evaluations, agent evaluations, etc.
Survey Evaluation Status	State of the evaluation process the survey is in, such as ‘complete’ if the survey has been completed fully, or ‘refused’ if a contact refused to take part in the survey. The stages of the process are predefined and vary based on your system.
Start Timestamp	The timestamp of when the survey interaction started. This refers to the moment the interaction was initiated and registered in the contact center, regardless of which channel the interaction was started through and what states and outcomes might occur later on.
Campaign Class	The name of the campaign class the evaluated interaction was a part of. A campaign class is a group of similar or related marketing campaigns with the same overarching goal or purpose.
Marketing Campaign	The name of the marketing campaign the evaluated interaction was a part of. A marketing campaign is a group of outbound activities with the goal of advertising a service or product

Label	Description
	to contacts.
Evaluated Agent	Agent that is being evaluated in the survey.
Company	The company the evaluated interaction is assigned to.
Contact Center	Contact center the evaluated interaction is assigned to.
Evaluated Queue	The queue that is being evaluated in the survey.
Agent Group	The agent group of the evaluated agent.
Survey Question	An individual question that was part of the survey.
Survey Question Form	The format of the survey question, such as a flag, a value between 0 and 9, text entry, etc.
Survey Question Category	A grouping of survey questions that a question belongs to, based on certain topics, such as availability, satisfaction, service, etc. The available categories vary based on your system.
Survey Answer	The survey question answer provided by survey participants, i.e., customers. This includes questions that were answered fully, questions that no answer was provided to, questions that had an error with the answer, etc.
Survey Answer Score	The answer score, as defined in the survey and in your system. The score varies based on multiple elements, such as the answer weight. For more information, contact your Administrator.
Interrupted	For partial surveys, this flag indicates at which question the survey was stopped, either because the contact decided to opt out of it, the session timed out, or other reasons.

Agent Scorecard Summary

This is a summary report showing you the most important data related to the scorecard evaluations of agents in your contact center.



Agent Scorecard Summary

	Evaluations	Completed Scorecards	Partial Scorecards	Draft Scorecards	Scorecard Questions	Answered Questions	Avg Scorecard Score	Avg Answer Score	Max Scorecard Score	Max Answer Score	Notes
Total	**4**	**2**	**1**	**1**	**6**	**8**	**3.75**	**4.13**	**6**	**6**	**1**
- Not defined -	4	2	1	1	6	7	3.75	4.57	6	6	1
Sales evaluation	1	0	0	1	3	0	0	0	0	0	0
Prospect care	1	0	0	1	1	0	0		0		0
Prospect interaction	1	0	0	1	1	0	0		0		0
Sale efficiency	1	0	0	1	1	0	0		0		0
Support evaluation	3	2	1	0	3	7	5	4.57	6	6	1
Customer interaction	2	2	0	0	1	2	6	5.5	6	6	0
Issue understanding	3	2	1	0	1	3	5	4.67	6	6	1
Resolution speed	3	2	1	0	1	2	5	3.5	6	4	1
Test	1	0	1	0	1	1	3	1	3	1	1
Support evaluation	1	0	1	0	1	1	3	1	3	1	1
Customer interaction	1	0	1	0	1	1	3	1	3	1	1

The asset description is divided into chapters as shown below. In these chapters, you can find out what the goal of the asset is, which filters you can use for your data, how to set up your asset, which graphical elements you can use in it (if they are available), and, finally, what each metric refers to.

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Objectives

The goal of the Agent Scorecard Summary Standard Report is to help contact center supervisors understand the results of the scorecard evaluation activities conducted in their contact centers.

This report provides valuable insight into the agent evaluation scores received through scorecards, enabling the viewer to better understand the data and to utilize it to apply improvements where they may be needed.

This report should be usable for multiple environments with little or no need for adaptation.

Report parameters

> **Note**
> While Reporting standard assets, such as standard reports, can be implemented to many environments with little to no change, it is important to note that some settings, options and results may still vary based on your individual implementation, data and system settings. In case you have any questions, refer to your Administrator or Reporting contact.

Filters

You can use multiple filters for this report. From a list of available filters, select one or more values for which you want to see the data. For non-datetime filters, you can select all available values, search for specific values, or clear all selected values from the dropdown list. Mandatory filters are marked with *, while non-mandatory filters can be left empty, i.e., unset, in which case this filter will not influence the report.

Depending on the filter, the following options may be available in the dropdown filters along with the data from your data source:

- **- Not defined -**: Choosing this option includes the fields in your data source that have no (null) data.
- **- Not assigned -**: Selecting this option includes cases where an agent was not assigned to an interaction, such as for self-service interactions.

The following filters can be used for this report:

- **Company**: Choose the companies you want to see data for from the list of available companies.
- **Contact center**: Select the contact centers whose data you want to analyze in the report.

  > **Note**
  > Typically, filters and settings such as the Contact center or Company refer to the agent evaluated through scorecards. However, in some cases and in specific implementations, they may be set up differently. If you are not sure how this is set up in your system, refer to your Administrator.

- **Evaluator**: Choose the user responsible for the scorecard evaluation of an agent.
- **Evaluated agent group**: From the dropdown list, select the agent group of the agent evaluated through a scorecard.
- **Evaluated agent**: Choose the agent evaluated in a scorecard that you want to use to filter your data.
- **Queue ID**: Select the name of the queue that the evaluated agent's interaction was placed in.
- **Campaign Class**: Define which campaign classes you want to filter your data by. A campaign class is a group of similar or related marketing campaigns with the same overarching goal or purpose. The list of campaign classes available here depends on your implementation.
- **Marketing Campaign**: Select the individual campaigns you want to filter your data by. A (marketing) campaign is a group of activities with the goal of advertising a service or product to contacts. Typically, this would be aimed at a specific set of contacts, such as first-time buyers, or contacts in a specific location, etc. The list of campaigns available here depends on your implementation.

- **Interaction type**: Choose the type of interaction of the evaluated agent. You can select one, multiple, or all options. The interaction types are as follows:
  - **Consultation**: Interactions done within the call center where agents consult with other agents, supervisors etc. to resolve an issue.
  - **Outbound**: Interactions initiated by an agent or the system and directed to a contact through any available media types.
  - **Inbound**: Interactions initiated by the contact and aimed at the contact center through any available media types.
  - **Internal**: Interactions initiated for internal contact center purposes (and not directed toward contacts).
- **Media type**: From the dropdown list, select the specific media type(s) you want to filter your evaluated agents' interactions by.

Scorecard

- **Scorecard title**: Choose the name of the scorecard you want to filter data by.
- **Scorecard category**: Select the general category that the scorecard belongs to, such as sales or support.
- **Scorecard evaluation status**: From the dropdown list, choose status of the evaluation process that the scorecard is currently in.
- **Scorecard question**: Choose the individual question that was part of a scorecard.
- **Scorecard question type**: Select the format of questions used in a scorecard, such as text entry, 1-5 value, or other. The options available here may vary based on your implementation.
- **Scorecard question category**: From the dropdown list, select the grouping of scorecard questions that a question belongs to, which is based on certain topics, such as efficiency, interaction, etc. The available categories may vary based on your implementation.
- **Scorecard question failure reason**: Choose the reason why a scorecard question was evaluated with a failing score.

Time selection

- **Date interval**: Choose the dates (interval) or relative time frame for the data. Switch between the Time frame and Interval mode by clicking the toggle just above the Date filter.
  - **from - to**: Enter the **from** and **to** dates for your filter manually or select them from the dropdown menu.
  - **Time frame**: Toggle the **Time frame** switch on to use the time frame mode. From the dropdown lists, choose the time unit (Days, Weeks, Months, Quarters or Years) and the relative time frame for your report.
- **Time interval (from and to)**: Choose the time interval in which the interactions you want to see started. From a list of full hours (24-hour format), choose the starting and ending hour to show your data in.

> **Note**
> In this report, the time selection filters refer to the time the scorecard evaluation was done.

Settings

Time zone

With this setting, you can choose which time zone to view your data, filters and settings in. See *Report settings on page 10* for more information.

Date display format

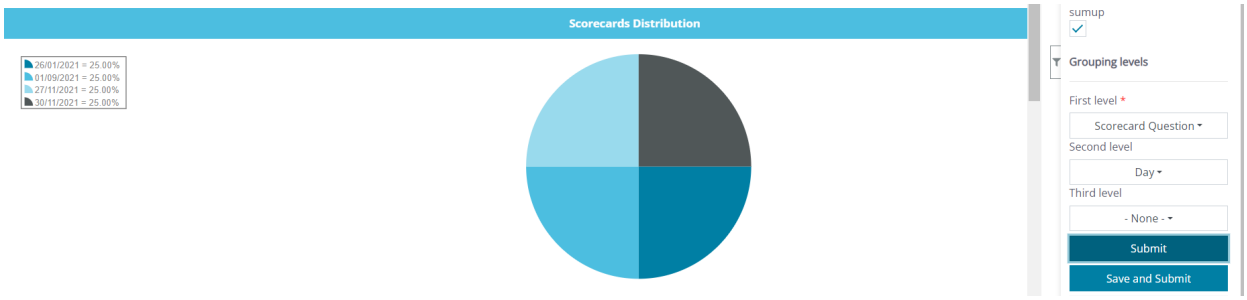
Using this setting, you can modify the way your date data is displayed in the report. See *Report settings on page 10* for more information.

Graphical elements

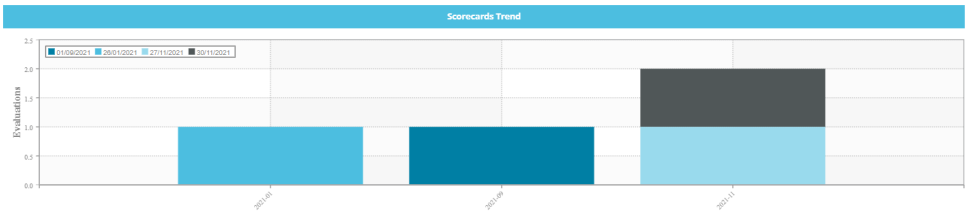
In this report, you can utilize various types of graphical elements to visualize your data. You can choose to use none of the graphical elements, one of them, or more of them at the same time. If you choose to use any of the graphical elements, they are placed at the top of the report and one under the other (if multiple are selected), as can be seen in the example in *Settings on page 10*.

The following graphical elements can be used with this report:

- **Pie chart**: The pie chart titled **Scorecards distribution** shows you the distribution of the number of conducted scorecard evaluations (including complete, partial and draft scorecards) across the highest set-up data grouping level field. Overall:
  - Each pie slice represents one individual value of the highest data grouping level you set up in the report settings.
  - Only one data grouping level is used as the basis for this report. If multiple data grouping levels are set up, only the highest is used.
  - A legend is available on the left side of the graphical element which shows the individual values of the individual slices.
  - You can hover over each pie slice to see the absolute value of the slice.
  - In the example below, you can see this pie chart and the data grouping level settings used to generate it. Even though multiple data grouping levels are set up, only the highest one is used for this chart. As "Day" is the highest set-up data grouping level, only that is used to generate this chart.



- **Column chart**: The stacked column chart titled **Scorecards trend** shows the number of conducted scorecard evaluations (including complete, partial and draft scorecards) per each value of the highest or second-highest set-up data grouping level, depending on the settings. Hover over each bar to see the label and/or value of that bar. Overall:
  - This chart utilizes up to two data grouping levels. If one is used, there is no stacking in bars; if two (or more) are set-up, bars are stacked.
  - The X-Axis shows the individual values of the only set-up data grouping level, if one grouping level is used, or the second-highest set-up data grouping level, if two or more grouping levels are used.
  - If two or more data grouping levels are set-up, the bars are stacked by the highest of them.
  - The Y-Axis always shows the number of evaluated surveys.
  - In the example below, you can see the stacked column chart and the data grouping level settings used to generate it. In the settings, you can see that all three data grouping levels are set-up. However, only the highest two are used: "Month" as the second grouping level (and second-highest, in this case), used as the X-Axis value, showing one bar for each month, and "Day" as the third grouping level (and highest, in this case), used as the criteria to stack the individual bars.



Show filters and settings sumup

Selecting this checkbox shows you a sumup of all report details. See more in *Report settings on page 10*.

Data grouping levels

Up to three data grouping levels can be set up for the parameters in this report. Only the first (lowest) level is mandatory; the other grouping levels are optional and can be left unset. If unset, these data grouping levels will not be shown in the report.

The following parameters can be selected from dropdown lists and used as the data grouping levels in this report:

- **Campaign Class**: The name of the campaign class. A campaign class is a group of similar or related marketing campaigns with the same overarching goal or purpose.
- **Company**: Name of the company.
- **Contact Center**: Name of the contact center.
- **Evaluated agent**: The agent who was evaluated in a survey.
- **Evaluated agent group**: The agent group of the agent that was evaluated in the scorecard.
- **Evaluated agent ID**: The ID of the agent evaluated in the scorecard.
- **Evaluated agent info**: Additional info about the agent evaluated in the scorecard, such as their first and last name.

- **Evaluator ID**: The ID of the scorecard evaluator.
- **Evaluator info**: Additional info about the user who evaluated the scorecard, such as their first and last name.
- **Interaction type**: The type of the interaction of the evaluated agent.
- **Marketing Campaign**: The name of the marketing campaign. A marketing campaign is a group of outbound activities with the goal of advertising a service or product to contacts.
- **Media type**: The type of media, or communication channel, used by the evaluated agent to handle the interaction.
- **Queue description**: A description of the queue the interaction of the evaluated agent was in.
- **Queue ID**: The unique ID of the queue the interaction of the evaluated agent was in.
- **Scorecard category**: The general category the scorecard belongs to, such as sales or support.
- **Scorecard description**: The description of the used scorecard.
- **Scorecard evaluation status**: The status of the evaluation process that the scorecard is in.
- **Scorecard question**: An individual question that was part of the scorecard.
- **Scorecard question category**: A grouping of scorecard questions that a question belongs to, based on certain topics.
- **Scorecard question failure reason**: The reason why the scorecard question was evaluated with a failing score.
- **Scorecard question index**: The position or order of the question in the scorecard.
- **Scorecard question type**: The format of the scorecard question, such as a flag, a value between 1 and 5, text entry, etc.
- **Scorecard question weight**: A coefficient assigned to a question, indicating the influence of the question on the average and reflecting its importance.
- **Scorecard title**: The name of the used scorecard.
- **Service**: The name of the service the interaction of the evaluated agent was a part of.
- **Year/Month/Day/Hour**: Time unit to be used as a grouping level.

> **Note**
> The totals in each row of this report are not calculated through the sums of the details shown in the report, but instead take advantage of the different rows available in your DWH. This means that depending on your settings, the totals in the rows of your report may be higher or lower than the sum of the individual detail values below them.

Report values definition

Report values are part of the report itself and are shown once the report is generated. They are predefined and cannot be modified through the report settings and filters. In practical terms, report values are the columns shown in your report. Each metric shown in your report's columns is described below in more detail; explanations are also available on hover over the individual metrics in the report.

The list below shows **all the available metrics and KPIs** that could be used as columns in your report, but which will rarely all be used at the same time and in the same report. The actual metrics used in a report may

vary based on your implementation and the use of **report views**, as created by the Report Designer. See *Report Views on page 4* for more information.

> **Caution**
> Some UI elements, such as tooltips and labels, can be customized to fit your team's or company's needs. However, if any customizations are applied, especially for the values presented in the table below, this document does **not** reflect them. The person/entity that created the customized content has the sole responsibility for informing all the users of their system about the customizations. Contact your system administrator for more information on your customizations.

The following report values are used in the Agent Scorecard Summary standard report:

Label	Tooltip
Evaluations	The total number of initiated evaluations, including complete, partial and draft scorecards.
Completed Scorecards	The total number of scorecards that were fully completed.
Partial Scorecards	The total number of scorecards that were submitted as complete, but some answers are missing.
Draft Scorecards	The total number of scorecards that were initiated, but not submitted as complete.
Scorecard Questions	The number of individual questions that are included per scorecard.
Answered Questions	The total number of answered questions.
Avg Scorecard Score	The average score of all the scorecards included with your filters and settings.
Avg Answer Score	The average answer score for all the individual answers of all the scorecards included with your filters and settings.
Max Scorecard Score	The single highest scorecard score of all the scorecards included with your filters and settings.
Max Answer Score	The single highest answer score of all the individual answers of all the scorecards included with your filters and settings.
Notes	Total count of notes made during scorecard evaluation by the evaluator. To see the content of the notes, navigate to your scorecard management system.

Agent Scorecard Detail

This is a detail report providing you with a detailed look at the scorecard evaluations of agents in your contact center.

Date: 2023-07-13

Agent Scorecard Detail

Scorecard Title	Scorecard Description	Scorecard Category	Scorecard Evaluation Status	Evaluator	Evaluated Agent Group	Evaluated Agent	Company	Contact Center	Timestamp	Service	Queue ID	Campaign Class	Marketing Campaign	Interaction Type	Media Type	Scorecard Questions	Answered Questions	Scorecard Score	Has note
Support evaluation	Agent evaluation on support campaigns	Support	Complete	[redacted]	[redacted]	[redacted]	[redacted]	[redacted]	2021-11-27 13:06:47	[redacted]	[redacted]	[redacted]	[redacted]	Outbound	Telephone	3	3	6	✖
Support evaluation	Agent evaluation on support campaigns	Support	Partial	[redacted]	[redacted]	[redacted]	[redacted]	[redacted]	2021-01-26 13:16:06	- Not defined -	- Not defined -	- Not defined -	- Not defined -	Outbound	Telephone	3	2	3	✔
Support evaluation	Agent evaluation on support campaigns	Support	Complete	[redacted]	[redacted]	[redacted]	[redacted]	[redacted]	2021-09-01 16:47:41	- Not defined -	- Not defined -	- Not defined -	- Not defined -	Outbound	Telephone	3	3	6	✖
Sales evaluation	Agent evaluation on sale campaigns	Sales	Draft	[redacted]	[redacted]	[redacted]	[redacted]	[redacted]	2021-11-30 20:57:24	- Not defined -	- Not defined -	- Not defined -	- Not defined -	Internal	Telephone	3	0	0	✖

The asset description is divided into chapters as shown below. In these chapters, you can find out what the goal of the asset is, which filters you can use for your data, how to set up your asset, which graphical elements you can use in it (if they are available), and, finally, what each metric refers to.

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Report parameters ***178***

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Objectives

The goal of the Agent Scorecard Detail Standard Report is to help contact center supervisors understand the results of the scorecard evaluation activities conducted in their contact centers.

This report provides a very detailed look at the agent evaluation scores received through scorecards, enabling the viewer to better understand the data and to utilize it to apply improvements where they may be needed.

This report should be usable for multiple environments with little or no need for adaptation.

Report parameters

> **Note**
> While Reporting standard assets, such as standard reports, can be implemented to many environments with little to no change, it is important to note that some settings, options and results may still vary based on your individual implementation, data and system settings. In case you have any questions, refer to your Administrator or Reporting contact.

Filters

You can use multiple filters for this report. From a list of available filters, select one or more values for which you want to see the data. For non-datetime filters, you can select all available values, search for specific values, or clear all selected values from the dropdown list. Mandatory filters are marked with *, while non-mandatory filters can be left empty, i.e., unset, in which case this filter will not influence the report.

Depending on the filter, the following options may be available in the dropdown filters along with the data from your data source:

- **- Not defined -**: Choosing this option includes the fields in your data source that have no (null) data.
- **- Not assigned -**: Selecting this option includes cases where an agent was not assigned to an interaction, such as for self-service interactions.

The following filters can be used for this report:

- **Company**: Choose the companies you want to see data for from the list of available companies.
- **Contact center**: Select the contact centers whose data you want to analyze in the report.

  > **Note**
  > Typically, filters and settings such as the Contact Center or Company refer to the agent evaluated through scorecards. However, in some cases and in specific implementations, they may be set up differently. If you are not sure how this is set up in your system, refer to your Administrator.

- **Evaluator**: Choose the user responsible for the scorecard evaluation of an agent.
- **Evaluated agent group**: From the dropdown list, select the agent group of the agent evaluated through a scorecard.
- **Evaluated agent**: Choose the agent evaluated in a scorecard that you want to use to filter your data.
- **Service**: Select the name of the service the interaction of the evaluated agent was a part of. A service is a grouping of queues and/or agents assigned to an application or following a specific, specialized workflow that defines how to handle interactions. Examples include a credit card service for a bank, a complaints service etc.
- **Queue ID**: Select the name of the queue that the evaluated agent's interaction was placed in.
- **Campaign Class**: Define which campaign classes you want to filter your data by. A campaign class is a group of similar or related marketing campaigns with the same overarching goal or purpose. The list of campaign classes available here depends on your implementation.

- **Marketing Campaign**: Select the individual campaigns you want to filter your data by. A (marketing) campaign is a group of activities with the goal of advertising a service or product to contacts. Typically, this would be aimed at a specific set of contacts, such as first-time buyers, or contacts in a specific location, etc. The list of campaigns available here depends on your implementation.
- **Interaction type**: Choose the type of interaction of the evaluated agent. You can select one, multiple, or all options. The interaction types are as follows:
  - **Consultation**: Interactions done within the call center where agents consult with other agents, supervisors etc. to resolve an issue.
  - **Outbound**: Interactions initiated by an agent or the system and directed to a contact through any available media types.
  - **Inbound**: Interactions initiated by the contact and aimed at the contact center through any available media types.
  - **Internal**: Interactions initiated for internal contact center purposes (and not directed toward contacts).
- **Media type**: From the dropdown list, select the specific media type(s) you want to filter your evaluated agents' interactions by.

Scorecard

- **Scorecard title**: Choose the name of the scorecard you want to filter data by.
- **Scorecard category**: Select the general category that the scorecard belongs to, such as sales or support.
- **Scorecard evaluation status**: From the dropdown list, choose status of the evaluation process that the scorecard is currently in.

Time selection

- **Date interval**: Choose the dates (interval) or relative time frame for the data. Switch between the Time frame and Interval mode by clicking the toggle just above the Date filter.
  - **from - to**: Enter the **from** and **to** dates for your filter manually or select them from the dropdown menu.
  - **Time frame**: Toggle the **Time frame** switch on to use the time frame mode. From the dropdown lists, choose the time unit (Days, Weeks, Months, Quarters or Years) and the relative time frame for your report.
- **Time interval (from and to)**: Choose the time interval in which the interactions you want to see started. From a list of full hours (24-hour format), choose the starting and ending hour to show your data in.

> **Note**
> In this report, the time selection filters refer to the time the scorecard evaluation was done.

Settings

Time zone

With this setting, you can choose which time zone to view your data, filters and settings in. See *Report settings on page 10* for more information.

Date display format

Using this setting, you can modify the way your date data is displayed in the report. See *Report settings on page 10* for more information.

Timestamp display format

By modifying this setting, you can choose how your timestamp data is displayed in the report. See *Report settings on page 10* for more information.

Show filters and settings sumup

Selecting this checkbox shows you a sumup of all report details. See more in *Report settings on page 10*.

Interaction Journey Report UUID

Enter the UUID of the detail report that you want to open when you click an interaction in the report. See more in *Master-Detail report relationships on page 15*.

Report values definition

Report values are part of the report itself and are shown once the report is generated. They are predefined and cannot be modified through the report settings and filters. In practical terms, report values are the columns shown in your report. Each metric shown in your report's columns is described below in more detail; explanations are also available on hover over the individual metrics in the report.

The list below shows **all the available metrics and KPIs** that could be used as columns in your report, but which will rarely all be used at the same time and in the same report. The actual metrics used in a report may vary based on your implementation and the use of **report views**, as created by the Report Designer. See *Report Views on page 4* for more information.

> **Caution**
>
> Some UI elements, such as tooltips and labels, can be customized to fit your team's or company's needs. However, if any customizations are applied, especially for the values presented in the table below, this document does **not** reflect them. The person/entity that created the customized content has the sole responsibility for informing all the users of their system about the customizations. Contact your system administrator for more information on your customizations.

The following report values are used in the Agent Scorecard Detail standard report:

Label	Tooltip
Scorecard Title	The name of the used scorecard.
Scorecard Description	The description of the used scorecard.

Label	Tooltip
Scorecard Category	The general category the scorecard belongs to, such as sales or support.
Scorecard Evaluation Status	The status of the evaluation process that the scorecard is in.
Evaluator	The person responsible for evaluating the scorecard.
Evaluated Agent Group	The agent group of the agent that was evaluated in the scorecard.
Evaluated Agent	The agent that was evaluated in the scorecard.
Company	The company of the evaluated agent.
Contact Center	The contact center of the evaluated agent.
Timestamp	The date and time of when the scorecard evaluation was submitted as complete.
Service	The name of the service the interaction of the evaluated agent was a part of. A service is a grouping of queues and/or agents assigned to an application or following a specific, specialized workflow that defines how to handle interactions. Examples include a credit card service for a bank, a complaints service etc.
Queue ID	The name of the queue the interaction of the evaluated agent was in.
Campaign Class	The name of the campaign class the interaction of the evaluated agent was a part of. A campaign class is a group of similar or related marketing campaigns with the same overarching goal or purpose.
Marketing Campaign	The name of the marketing campaign the interaction of the evaluated agent was a part of. A marketing campaign is a group of outbound activities with the goal of advertising a service or product to contacts.
Interaction type	The type, or direction, of the interaction of the evaluated agent. This refers to the way contacts, i.e. interactions were initiated and connected with the system. This includes outbound (started by an agent or the system and aimed at a contact), inbound (started by a contact and aimed at the contact center), and internal (for internal contact center purposes) interactions.
Media type	The type of media, or communication channel, used by the evaluated agent to handle the interaction. This refers to the tools that the contact and agent or contact center used to communicate. Media types include, but are not limited to, emails, chat, telephone etc. The available types may vary based on your implementation.
Scorecard Questions	The number of individual questions that are included per scorecard.

Label	Tooltip
Answered Questions	The total number of answered questions.
Scorecard Score	The final score of the entire scorecard. This is calculated by taking into account the weight of the individual questions in the scorecard.
Has note	A flag indicating whether or not there are any notes made by the evaluator in the scorecard. To see the content of the notes, navigate to your scorecard management system.

Callback Summary

This standard report provides a summary of the contact center callback requests and the most important metrics for callback request-related interactions.

The asset description is divided into chapters as shown below. In these chapters, you can find out what the goal of the asset is, which filters you can use for your data, how to set up your asset, which graphical elements you can use in it (if they are available), and, finally, what each metric refers to.

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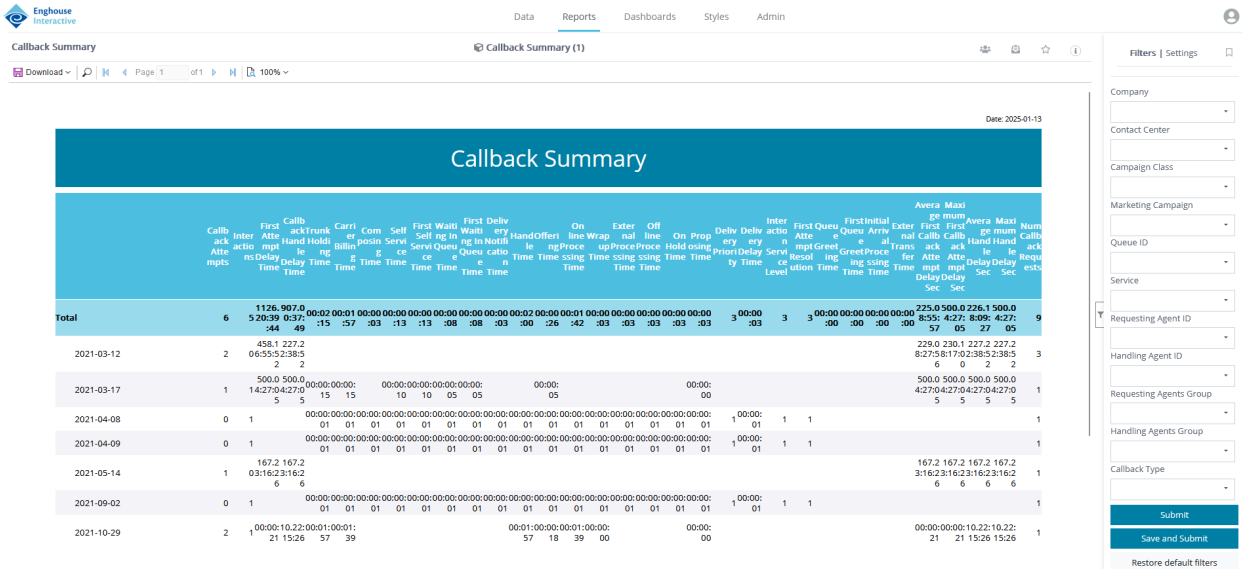


Objectives

The Callback Summary Standard Report was created to help contact center supervisors access data about the callback requests that occurred in a given time, and to optimize the interaction handling by reviewing the time the agents respond to and spend on each callback request.

Gaining insight into this data should help minimize the cost per interaction, maximize customer satisfaction, and optimize the agents' work time by analyzing the existing data and finding the areas that may need improvement.

The ability to access data on callback requests, in which situations they are addressed, what the responses are, and how they compare to other callback request responses in the same or other instances is fundamental in order to check the various aspects of the response performance: From identifying training needs to optimizing the business process that supports the treatment of each callback request response.

This report should be usable for multiple environments with little or no need for adaptation.

Report parameters

> **Note**
> While Reporting Standard Reports can be implemented to many environments with little to no change, it is important to note that some settings, options and results may still vary based on your individual implementation, data and system settings. In case you have any questions, refer to your Administrator or Reporting contact.

Filters

You can use multiple filters for this report. From a list of available filters, select one or more values for which you want to see the data. For non-datetime filters, you can select all available values, search for specific values, or clear all selected values from the dropdown list. Mandatory filters are marked with *, while non-mandatory filters can be left empty, i.e., unset, in which case this filter will not influence the report.

Depending on the filter, the following options may be available in the dropdown filters along with the data from your data source:

- **- Not defined -**: Choosing this option includes the fields in your data source that have no (null) data.
- **- Not assigned -**: Selecting this option includes cases where an agent was not assigned to an interaction, such as for self-service interactions.

The following filters can be used for this report:

- **Company**: Choose the companies you want to see data for from the list of available companies.
- **Contact Center**: Select the contact centers whose data you want to analyze in the report.
- **Campaign class**: Define which campaign classes you want to filter your data by. A campaign class is a group of similar or related marketing campaigns with the same overarching goal or purpose. The list of campaign classes available here depends on your implementation.
- **Marketing campaign**: Select the individual campaigns you want to filter your data by. A (marketing) campaign is a group of outbound activities with the goal of advertising a service or product to contacts. Typically, this would be aimed at a specific set of contacts, such as first-time buyers, or contacts in a specific location, etc. The list of campaigns available here depends on your implementation.
- **Queue ID**: Choose the specific queue(s) whose data you want to use in the report.
- **Service**: From the dropdown list of available services, choose one or multiple services you want to filter your data by. A service refers a grouping of queues and/or agents assigned to an application or following a specific, specialized workflow that defines how to handle interactions. Examples include a credit card service for a bank, a complaints service etc. The list of services available here depends on your implementation.
- **Requesting Agent ID**: From a list of available agents, select one or more agents that requested the callback. The list shows the agents available for this report in your system.

- **Handling Agent ID**: From a list of available agents, select one or more agents that handled the requested callback. The list shows the agents available for this report in your system.
- **Requesting Agents Group**: From the dropdown list, select the agents groups that requested the callback. The list shows the agents available for this report in your system.
- **Handling Agents Group**: From the dropdown list, select the agents groups that handled the requested callback. The list shows the agents available for this report in your system.
- **Callback Type**: From the dropdown list, select the specific callback type(s) used to initiate a callback interaction. The type can be one of the following:
  - **Agent appointment**: Appointment with a specific agent.
  - **Queue appointment**: Appointment with any agent assigned to queue.
  - **Call me now**: Request for immediate callback.
  - **Callback**: Other callback requests.
- **Callback Origin**: From the dropdown list, select the specific callback origin(s) of callback requests for a callback interaction. Depending on your environment, you will have different values.
- **Callback Status**: From the dropdown list, select the specific status(es) of callback requests for a callback interaction. The status can be one of the following:
  - **Backlog**: Request still needs to be handled.
  - **First attempt done**: A first attempt to handle the callback was completed but further attempts need to be made to complete the request. The **Callback attempts** column will contain the total number of attempts.
  - **Handled**: The callback request has been handled.

Time selection

- **Date interval**: Choose the dates (interval) or relative time frame for the data. Switch between the Time frame and Interval mode by clicking the toggle just above the Date filter.
  - **from - to**: Enter the **from** and **to** dates for your filter manually or select them from the dropdown menu.
  - **Time frame**: Toggle the **Time frame** switch on to use the time frame mode. From the dropdown lists, choose the time unit (Days, Weeks, Months, Quarters or Years) and the relative time frame for your report.
- **Time interval (from and to)**: Choose the time interval in which the interactions you want to see started. From a list of full hours (24-hour format), choose the starting and ending hour to show your data in.

Settings

Time zone

With this setting, you can choose which time zone to view your data, filters and settings in. See *Report settings on page 10* for more information.

Duration display format

The **Duration display format** setting lets you define how you want to display the durations shown in your report. For more information, see this section.

Date display format

Using this setting, you can modify the way your date data is displayed in the report. See *Report settings on page 10* for more information.

Event for date and time filters

Define which even you are filtering your date and time by. Based on which option you choose, varying timestamps will be used as reference for the date and time when data is filtered. The following options are available:

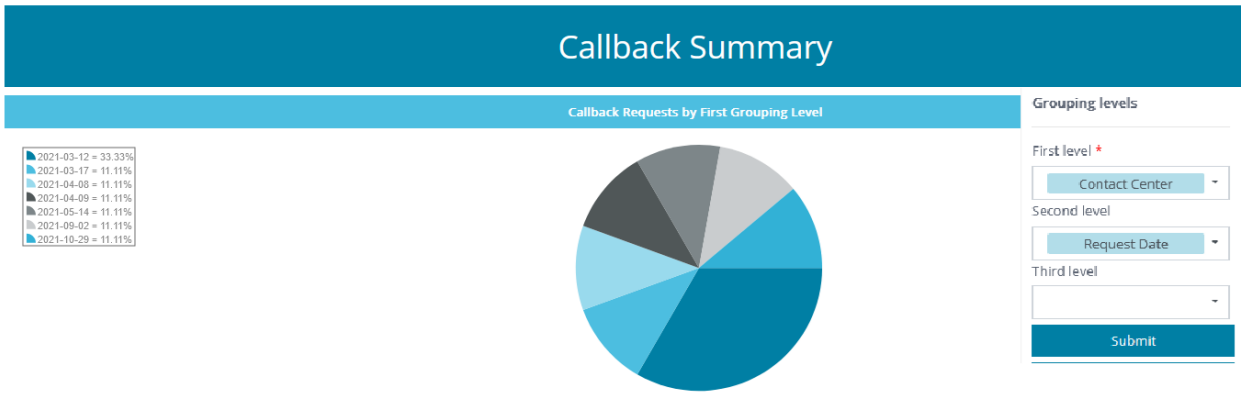
- **Request date**: With this option, the date a callback was requested is taken as the basis for the date and time filters.
- **Schedule date**: With this option, the date a callback was scheduled is taken as the basis for the date and time filters.

Graphical Elements

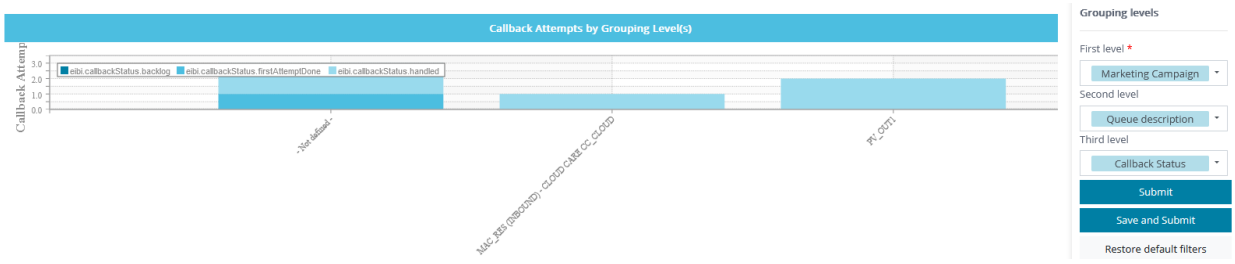
In this report, you can utilize two types of graphical elements to visualize your data. You can choose to use none of the graphical elements, (either) one of them, or both of them at the same time. If you choose to use any of the graphical elements, they are placed at the top of the report and one under the other (if multiple are selected), as can be seen in the example in *Objectives on page 183*.

The following two graphical elements can be used with this report:

- **Pie chart**: The pie chart in this standard report is titled **Callback requests by First Grouping Level**, and it shows the distribution of a number of callback requests accross the highest data grouping level you set up in your report settings. Overall:
  - Each pie slice represents one individual value of the highest data grouping level you set up in the report settings.
  - Only one data grouping level is used as the basis for this report. If multiple data grouping levels are set up, only the highest is used.
  - A legend is available on the left side of the graphical element which shows the individual values of the individual slices.
  - You can hover over each pie slice to see the absolute value of the slice.
  - In the example below, you can see this pie chart and the data grouping level settings used to generate it. Even though multiple data grouping levels are set up, only the highest one is used for this chart. As "Day" is the highest set-up data grouping level, only that is used to generate this chart.



- **Column chart**: The stacked column chart titled **Callback attempts by grouping level(s)** shows the number of callback attempts per each value of the highest or second-highest set-up data grouping level, depending on the settings. Hover over each bar to see the label and/or value of that bar. Overall:
  - This chart utilizes up to two data grouping levels. If one is used, there is no stacking in bars; if two (or more) are set-up, bars are stacked.
  - The X-Axis shows the individual values of the only set-up data grouping level, if one grouping level is used, or the second-highest set-up data grouping level, if two or more grouping levels are used.
  - If two or more data grouping levels are set-up, the bars are stacked by the highest of them.
  - The Y-Axis always shows the number of surveys.
  - In the example below, you can see the stacked column chart and the data grouping level settings used to generate it. In the settings, you can see that all three data grouping levels are set-up. However, only the highest two are used: "Queue description" as the second grouping level (and second-highest, in this case), used as the X-Axis value, showing one bar for each queue, and "Callback status" as the third grouping level (and highest, in this case), used as the criteria to stack the individual bars.



Show filters and settings sumup

Selecting this checkbox shows you a sumup of all report details. See more in *Report settings on page 10*.

Data grouping levels

Up to three data grouping levels can be set up for the parameters in this report. Only the first (lowest) level is mandatory; the other grouping levels are optional and can be left unset. If unset, these data grouping levels will not be shown in the report.

The following parameters can be selected from dropdown lists and used as the data grouping levels in this report:

- **Company**: Name of the company.
- **Contact Center**: Name of the contact center.
- **Campaign Class**: Name of the campaign class.
- **Marketing Campaign**: Name of the marketing campaign.
- **Queue ID**: The ID of the queue without a description.
- **Queue Description**: The (brief) description of the queue, if provided in your implementation.
- **Requesting Agent ID**: ID of the agent who requested the callback.
- **Handling Agent ID**: ID of the agent who handled the requested callback.
- **Requesting Agent Info**: Additional information on the agent who requested the callback.
- **Handling Agent Info**:Additional information on the agent who handled the requested callback.
- **Request Date**: Date the callback was requested.
- **Schedule Date**: Date the callback was scheduled.
- **Request Hour**: Hour the callback was requested.
- **Schedule Hour**: Hour the callback was scheduled.
- **Requesting Agent Group**: Name of the agents groups that requested the callback.
- **Handling Agent Group**: Name of the agents groups that handled the requested callback.
- **Service**: Name of the service.
- **Callback Type**: Type of activity used to initiate a callback.
- **Callback Origin**: Origin of callback requests for a callback.
- **Callback Status**: Status of callback requests for a callback.

> **Note**
> The totals in each row of this are not calculated through the sums of the details shown in the report, but instead take advantage of the different rows available in your DWH. This means that depending on your settings, the totals in the rows of your report may be higher or lower than the sum of the individual detail values below them. For more information on how a specific total is calculated, contact your System Administrator.

Report values definition

Report values are part of the report itself and are shown once the report is generated. They are predefined and cannot be modified through the report settings and filters. In practical terms, report values are the columns shown in your report. Each metric shown in your report's columns is described below in more detail; explanations are also available on hover over the individual metrics in the report.

The list below shows **all the available metrics and KPIs** that could be used as columns in your report, but which will rarely all be used at the same time and in the same report. The actual metrics used in a report may vary based on your implementation and the use of **report views**, as created by the Report Designer. See *Report Views on page 4* for more information.

> **Caution**
>
> Some UI elements, such as tooltips and labels, can be customized to fit your team's or company's needs. However, if any customizations are applied, especially for the values presented in the table below, this document does **not** reflect them. The person/entity that created the customized content has the sole responsibility for informing all the users of their system about the customizations. Contact your system administrator for more information on your customizations.

The following report values can be used in the Callback Summary standard report:

Label	Tooltip
Callback attempts	Number of interaction attempts to handle the callback request.
Interactions	Number of interactions that have callback requests.
First Attempt Delay Time	Delay time of the first attempted interaction after the scheduled date / time.
Callback Handle Delay Time	Delay time of the first successful handled interaction after the scheduled date / time.
Trunk Holding Time	The total time the interaction was taking up the trunk to resolve an interaction (such as an inbound call) by the agent. This includes all states where a phone line (trunk) is busy due to an undergoing interaction. The specific calculation for the trunk holding time may vary based on your implementation, but typically it includes all queue-related states, self-service, online activity etc.
Carrier Billing Time	The total time spent in an interaction that is billed by the network carrier. Typically, this is the time the interaction spent in a call (including waiting in queue, on hold, and in an active conversation), after the call is picked up until it is hung up.
Composing Time	The total time it took the agent to enter the relevant information for an outbound interaction, such as entering a phone number for an outbound call.
Self Service Time	The time the interaction is working on self service applications, in seconds.
First Self Service Time	The time that the interaction spends in self service application(s) before the first time it gets placed in a queue.
Waiting in Queue Time	The time that the interaction spends waiting on a queue. For interactions that were queued more than once, it is the sum of all of the times spent waiting on queues.
First Waiting in Queue	The time that the interaction spent waiting on the first queue it is placed in.

Label	Tooltip
Time	
Delivery Notification Time	Time duration of the message used to inform the contact that they are about to be connected with the agent. Typically, this may include information such as the contact's location, or some instructions regarding the interaction.
Handle Time	The total time the interaction has spent in the 'Handling' state. In this state, an agent is actively working on the interaction. The specific steps that are included in the 'Handling' state vary based on your implementation.
Offering Time	The total time an interaction has spent in the 'Offering' state. In this state, the interaction (inbound / outbound call, chat, email...) has been initiated, but the participants are not connected or actively communicating yet. For example, for incoming calls, this state's duration is equal to the ring time of the agent's phone (before they pick up). For outgoing calls, it is the ring time of the contact's phone. For chat, it is the time between the chat offer and the agent's first response.
Online Processing Time	The duration of the online processing status. The work time spent by an agent on live interactions (for example, calls or chats). For interactions with more than one handling agent, it is the sum of all of the times in this state for the interaction.
Wrapup Time	The total time the interaction has spent in the 'Wrapup' state. In this state, after finishing an interaction with a contact, the agents set up the wrapup code of the interaction during post-processing.
External Processing Time	The duration of the external processing status. It is the status of the interaction after the online or offline processing and, if it is available, after wrapup. It is the status where the agent can compile some data entry in their organization's applications (for example, CIM or CRM). For interactions with more than one handling agent, it is the sum of all of the times in this state for the interaction.
Offline Processing Time	The duration of the offline processing status. The work time spent by an agent on a "non live interaction" (for example, email). For interactions with more than one handling agent, it is the sum of all of the times in this state for the interaction.
On Hold Time	The duration of on hold status (the agent has placed the customer on hold). It is also included in the online processing states time. For interactions with more than one handling agent, it is the sum of all of the times in this state for the interaction.
Proposing Time	The total time the interaction was in the 'Proposing' state. This state is only available for automatic outbound calls in preview mode. In this state, the agent analyzes the contact before requesting the call.
Delivery Priority	The delivery priority level of a queued interaction. The higher the priority of an interaction, the sooner (before lower-priority interactions) it will be delivered to an agent for further handling. The definition of the priority levels depends on your implementation, contact your system administrator for more information.
Delivery Delay Time	The total time an agent has spent on a delayed delivery.

Label	Tooltip
Interaction Service Level	If defined, it is the level of response time to service customer requests that the contact center provided on interactions. Stated as a percentage, it is the percentage of interactions that were answered within an amount of time agreed on by the contact center management and their clients necessary for customer satisfaction. There can also be agreement on certain interactions being conditionally excluded from affecting service level due to conditions (for example, customers abandoning the interaction in a very short amount of time due to wrong number dialed).
First Attempt Resolution	A flag used to indicate if the interaction was resolved at the first attempt. This means that the interaction was resolved without the contact needing to initiate additional follow-up interactions to try to solve the same issue. If the interaction was resolved / handled with the first attempt, a green check mark is shown. If not, a red X is shown.
Queue Greeting Time	The total time the interaction has spent waiting in the queue while listening to the system's greeting message.
First Queue Greeting Time	The time that the interaction spends waiting while listening the greeting message on the first queue it has been placed in.
Initial Arrival Processing Time	The duration of the delay for interactions that require some system pre-processing or waiting in a parking status. It could be used, for example, to trace the delay of an email from the moment it is received to the time it is queued or proposed to an agent.
External Transfer Time	The duration of the interaction after being transferred to an external resource and still using system resources. It is usually used to store the duration of a call after being transferred to an external number.
Average First Callback Attempt Delay Sec	The average delay of the first callback request handle attempt interaction after its scheduled date / time.
Maximum First Callback Attempt Delay Sec	The maximum delay of the first callback request handle attempt interaction after its scheduled date / time.
Average Handle Delay Sec	The average delay of the first succeeded handle interaction after its scheduled date / time.
Maximum Handle Delay Sec	The maximum delay of the first succeeded handle interaction after its scheduled date / time.
Num Callback Request	Number of callback requests.