



**Customer Journey Platform  
Customer Engagement Analyzer  
User Guide**

## **Notification**

The Broadsoft CC-One solution has been renamed the Cisco Customer Journey Platform. Beginning in August 2018, you will begin to see the Cisco name and company logo, along with the new product name on the software, documentation and packaging. During this transition process, you may see both Broadsoft and Cisco brands and former product names. These products meet the same high standards and quality that both Broadsoft and Cisco are known for in the industry.

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# About This Guide

This guide explains how to use the features of the Cisco<sup>®</sup> Customer Journey Platform (CJP) Customer Engagement Analyzer to design and run visualizations, schedule visualizations to run at prescribed times and have the output sent to you and others, and customize your Customer Engagement Analyzer experience by creating one or more dashboards.

## Who Should Read This Guide

This guide is intended for individuals who use the Customer Engagement Analyzer to design, schedule and view visualizations and dashboards.

## How This Guide Is Organized

The chapters in this guide provide the following information:

**Chapter 1, “Getting Started,”** provides an overview of the Cisco Customer Engagement Analyzer, describes the prerequisites, and explains how to access the Analyzer and work with the View page.

**Chapter 2, “Standard Fields and Measures,”** describes the standard fields and measures that are available to all Analyzer subscribers.

**Chapter 3, “Running and Scheduling Visualizations and Dashboards,”** explains how run the visualizations and dashboards available to your enterprise and how to schedule visualizations and dashboards to be run on a periodic basis and associate them with an email list for automatic distribution.

**Chapter 4, “Designing Visualizations,”** explains how to design visualizations.

**Chapter 5, “Designing Dashboards,”** explains how to customize your Analyzer experience by creating one or more dashboards that can be run on demand or scheduled for periodic execution and distribution.

**Appendix A, “Sample Visualizations,”** provides examples of visualizations that can be created with Analyzer.

**Appendix B, “Mappings of ACD Metrics to Analyzer Parameters,”** provides mappings between ACD report parameters and corresponding Analyzer parameters.



# Getting Started

The Cisco<sup>®</sup> Customer Journey Platform (CJP) Customer Engagement Analyzer mines realtime and historical data from multiple data sources and systems to generate specific business views of the data. The Analyzer visually displays trends to help you discern patterns and gain insight for continuous improvement.

The Analyzer's standard visualizations tie business data to traditional operational metrics, which gives contact center managers visibility across both operational and business performance indicators in a single consolidated view. The Analyzer also provides an interface for creating and refining custom visualizations quickly and easily.

You can customize your Analyzer experience by creating dashboards that display your choice of visualizations and schedule them for automatic distribution to email recipients.

Topics covered in this chapter:

- [Customer Engagement Analyzer Prerequisites](#)
- [Accessing the Customer Engagement Analyzer](#)
- [Analyzer Title Bar Buttons](#)
- [Working with the View Pages](#)

## Customer Engagement Analyzer Prerequisites

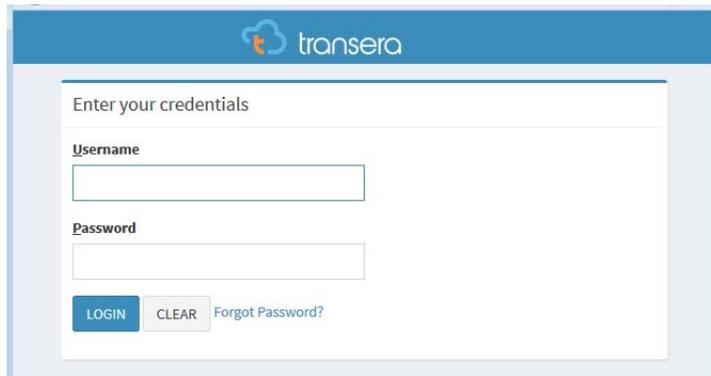
The Customer Engagement Analyzer requires Mozilla Firefox 20 or later, or the latest version of Google Chrome with cookies enabled.

For motion charts, Adobe Flash Player is also required.

# Accessing the Customer Engagement Analyzer

To access the Customer Engagement Analyzer:

1. Open your Web browser and navigate to the URL provided by your administrator.
2. On the login page that appears, enter your email address and password.



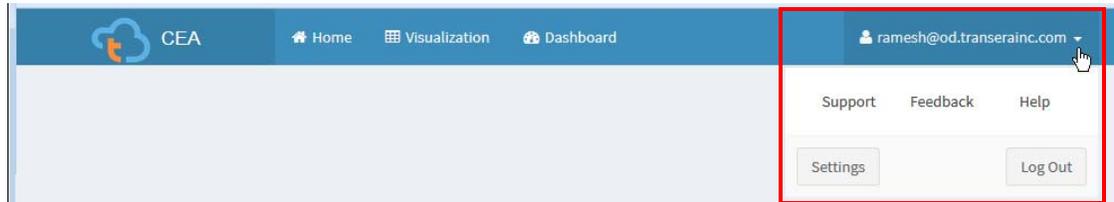
3. Click **Login**.

The Customer Engagement Analyzer home page appears, displaying a summary of all the data for each of the four data types in your repository. You can expand a tile by clicking a **More** button to display the details for today, yesterday, this week, last week, this month, and last month.

Time	Records	Oldest	Newest
Today	0	--	--
Yesterday	0	--	--
This Week	32	03/22/2016 17:19:15	03/24/2016 00:08:48
Last Week	0	--	--
This Month	32	03/22/2016 17:19:15	03/24/2016 00:08:48
Last Month	0	--	--
Total Records	32	03/22/2016 17:19:15	03/24/2016 00:08:48

## Analyzer Title Bar Buttons

The Analyzer title bar displays buttons that provide access to the Visualization and Dashboard View pages (described in the next topic, “[Working with the View Pages](#)”) as well as a button on the far right that provides options for logging out, getting help, and providing feedback. If your browser window is wide enough, the button label displays your user account name.



If you resize your browser window to make it narrow, your user account name is not displayed on the button label.



## Working with the View Pages

The **Visualization** and **Dashboard** buttons provide access to View pages. Each View page displays a directory of all the visualizations or dashboards to which you have access and provides an interface where you can do the following:

- Create, rename, and delete folders and subfolders beneath the parent directory.
- Move folders and visualizations or dashboards between folders.
- Access the visualization or dashboard creation page.
- Run and delete visualizations and dashboards.
- Open a visualization or dashboard for editing or scheduling.
- Export a visualization as a Microsoft Excel or CSV file.

Topics covered in this section:

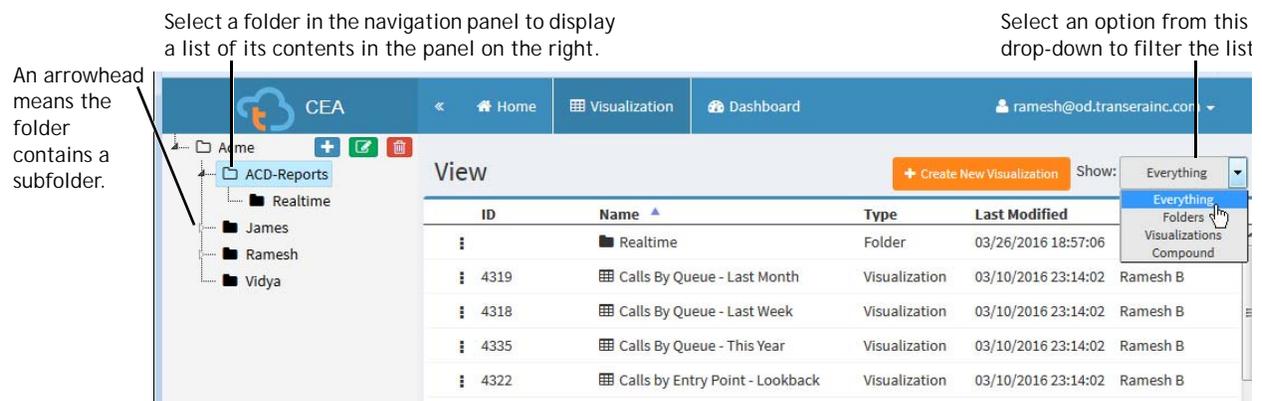
- [Navigating the View Page](#)
- [Adding, Renaming, and Deleting Folders](#)
- [Moving Objects to a Different Folder](#)

## Navigating the View Page

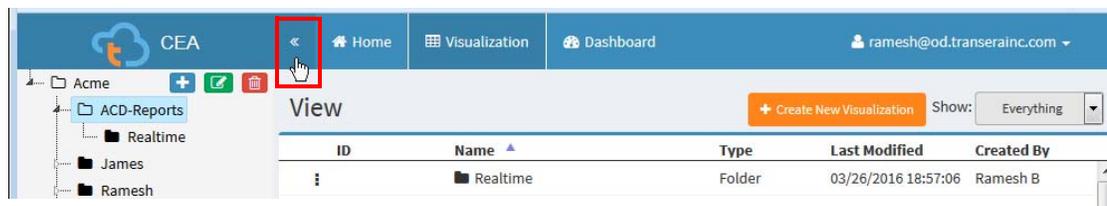
To navigate the contents of a View page:

1. On the Analyzer menu bar, click **Visualization** or **Dashboard**.
2. To filter the list, select an option from the **Show** drop-down list on the upper-right side of the page.
3. To display the contents of a folder, double-click a folder in the content panel on the right or click a folder in the navigation panel on the left.

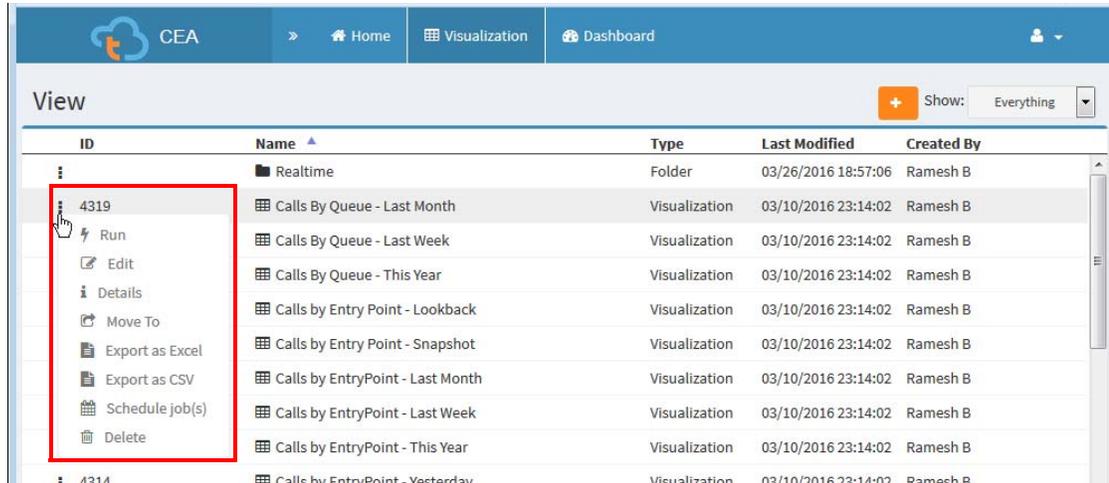
An arrowhead to the left of a folder in the navigation panel means that the folder contains a subfolder. You can click the arrowhead or the folder itself to display the subfolder, and then click the subfolder to display its contents in the content panel.



4. To increase your workspace, you can hide the navigation panel by clicking the << button on the menu bar. Then you can click the >> button to restore the panel.



5. To access a menu listing actions you can perform, click the  button to the left of a listed folder, visualization, or dashboard.



Action	Description
Run	Runs the selected report or dashboard (see <a href="#">“Running a Visualization or Dashboard”</a> on page 24).
Edit	Opens the selected visualization or dashboard in a page where you can edit it.
Details	Displays additional details about the selected item, such as the title, date range, and number of scheduled jobs for a visualization.
Move To	Opens a dialog box where you can select the folder that you want to move the selected item into.
Export as Excel	Opens a dialog box where you can open or save the selected historical visualization as a Microsoft Excel or CSV file.
Export as CSV	The export option is not available for realtime or compound visualizations.
Schedule Job(s)	Opens a page where you can schedule the selected visualization or dashboard to be run on a periodic basis and associate it with an email list for automatic distribution (see <a href="#">“Scheduling a Visualization or Dashboard”</a> on page 33).
Delete	Deletes the selected visualization or dashboard. You cannot delete a visualization that is used in a dashboard.

## Adding, Renaming, and Deleting Folders

Buttons at the top of the navigation panel enable you to add, rename, and delete folders.

### To add a new folder:

1. In the navigation panel, select the folder into which you want to insert a new folder, and then click the **New Folder**  button at the top of the navigation panel.
2. In the dialog box that appears, enter a name and click **OK**.

### To rename a folder:

1. Select a folder and click the **Rename Folder**  button.
2. In the dialog box that appears, enter a name and click **OK**.

### To delete a folder:

1. Select an empty folder and click the **Delete Folder**  button.
2. In the confirmation dialog box, click **Yes**. If the folder is not empty, a message informs you that the operation failed.

## Moving Objects to a Different Folder

To move a visualization, dashboard, or folder to a different folder:

1. In the navigation panel, select the folder containing the object you want to move. The folder's contents are displayed in the contents panel on the right.
2. If the destination folder is not visible in the navigation panel, click the arrowhead to the left of the parent folder to display its subfolder.
3. Drag a visualization or dashboard from the contents panel to the destination folder in the navigation panel.

- OR -

Click the  button to the left of a listed folder, visualization, or dashboard, select **Move To** from the context menu, and in the dialog box that opens, select the destination folder and click **OK**.



## Standard Fields and Measures

The Customer Engagement Analyzer is powered by the following activity and session repositories created by extracting data from a variety of systems:

- Customer Activity Repository (CAR)
- Customer Session Repository (CSR)
- Agent Activity Repository (AAR)
- Agent Session Repository (ASR)

This chapter describes the standard fields and measures aggregated in the activity and session repositories that are available to all Customer Engagement Analyzer subscribers.

- *Fields* are textual values that can be added to a visualizations as profile variables or segments.
- *Measures* are numeric values that can be used as profile variables.

In addition to the standard fields and measures, you can work with Broad Professional Services to create custom fields and measures extracted from a variety of systems.

Topics covered in this chapter:

- [Type of Records Available in Each Repository](#)
- [Standard CSR and CAR Fields and Measures](#)
  - [Standard ACD Fields and Measures in the CSR and CAR](#)
  - [Standard CRM Fields and Measures in the CSR and CAR](#)
  - [Standard IVR Fields and Measures in the CSR and CAR](#)
- [Standard AAR and ASR Fields and Measures](#)

## Type of Records Available in Each Repository

The following table describes the type of records aggregated in each customer and agent activity and session repository.

Record Type	Description	Examples
Customer Activity	Represents an atomic step in the customer workflow	<ul style="list-style-type: none"> <li>• Customer in IVR or queue, talking to agent, on hold</li> <li>• Customer on home page, product page, checkout page</li> </ul>
Customer Session	Represents the customer workflow, consisting of a sequence of customer activities	<ul style="list-style-type: none"> <li>• Customer call to a call center</li> <li>• Customer visit to a Web site</li> <li>• Customer visits Web site and chats with agent</li> <li>• Customer sends email and agent responds</li> </ul>
Agent Activity	Represents an atomic step in the agent workflow	<ul style="list-style-type: none"> <li>• Agent idle, available, talking, wrapping up</li> <li>• Agent offline, dialing, talking, entering notes</li> <li>• Agent idle, available, chatting, wrapping up</li> <li>• Agent offline, reading email, responding, wrapping up</li> </ul>
Agent Session	Represents the agent workflow, consisting of a sequence of agent activities	<ul style="list-style-type: none"> <li>• Agent handles a service call and logs an incident</li> <li>• Agent places an outbound call and sets up a meeting</li> <li>• Agent chats with a customer and answers a question</li> <li>• Agent reads and responds to a customer email</li> </ul>

## Standard CSR and CAR Fields and Measures

The standard fields and measures aggregated in the Customer Session Repository (CSR) and Customer Activity Repository (CAR) are described in the following sections.

- [Standard ACD Fields and Measures in the CSR and CAR](#)
- [Standard CRM Fields and Measures in the CSR and CAR](#)
- [Standard IVR Fields and Measures in the CSR and CAR](#)

### Standard ACD Fields and Measures in the CSR and CAR

The standard ACD fields and measures aggregated in the Customer Session Repository (CSR) and Customer Activity Repository (CAR) are described in the following table.

Label	Description	Data Type	Field or Measure
Agent ID	A string that identifies an agent.	String	Field
Agent Name	The name of an agent, that is, a person who answers customer calls.	String	Field
ANI	The ANI digits delivered with a call. ANI, or Automatic Number Identification, is a service provided by the phone company that delivers the caller's phone number along with the call.	String	Field
Call Count	The total number of calls that arrived at the entry point or queue during the time interval.	Integer	Measure
Call Duration	The amount of time between when the call arrived at the entry point or queue and when it was terminated.	Integer	Measure
Call End Time	The time the call was terminated.	String	Field
Call End Timestamp	The date and time the call was terminated.	Datetime /Long	Measure
Call Session ID	A value assigned by the system that uniquely identifies a call during its life cycle.	String	Field
Call Start Time	The time the call arrived at the entry point or queue.	String	Field
Call Start Timestamp	The time the call arrived at the entry point or queue.	Datetime /Long	Measure
CJP Queue	A queue that belongs to the CJP ACD.	String	Field
Channel Type	The media type of the contact, such as telephony, email, fax, or chat.	String	Field

Label	Description	Data Type	Field or Measure
Conference Count	The number of times an agent established a conference call with the caller and another agent.	Integer	Measure
Conference Duration	The amount of time an agent spent in conference with a caller and another agent.	Long	Measure
Consult Duration	The amount of time an agent spent consulting with another agent while handling a call.	Long	Measure
Current State	The current state of the contact. This field is available only in the CSR and only for realtime visualizations.	String	Field
DNIS	The DNIS digits delivered with the call. DNIS, or Dialed Number Identification Service, is a service provided by the phone company that delivers a digit string indicating the number the caller dialed along with the call.	String	Field
Entry Point ID	The ID assigned to an entry point.	String	Field
Entry Point Name	The name of the entry point, which is the landing place for customer calls on the CJP system. One or more toll-free or dial numbers can be associated with a given entry point. IVR call treatment is performed while a call is in the entry point. Calls are moved from the entry point into a queue and are subsequently distributed to agents.	String	Field
Hold Count	The number of times a call was put on hold.	Integer	Measure
Hold Duration	The amount of time during which a call was put on hold.	Long	Measure
IVR Duration	The amount of time during which a call was in the IVR system	Long	Measure
No. of Consults	The number of times an agent consulted with another agent while handling a call.	String	Field
Outdial Flag	Whether or not a call was made by an agent to a phone outside the contact center.	String	Field
Queue Duration	The amount of time calls were in a queue waiting to be sent to a destination site.	Long	Measure
Queue ID	The ID assigned to a queue.	String	Field
Queue Name	The name of a queue, which is holding place for calls while they await handling by an agent. Calls are moved from an entry point into a queue and are subsequently distributed to agents.	String	Field
Recording File ID	The ID assigned to a recording file.	String	Field
Site ID	The ID assigned to a call center location.	String	Field

Label	Description	Data Type	Field or Measure
Site Name	The call center location to which a call was distributed.	String	Field
Talk Duration	The amount of time an agent spent talking on an inbound call.	Long	Measure
Team ID	The ID assigned to a team.	String	Field
Team Name	A group of agents at a specific site who handle a particular type of call.	String	Field
Termination Type	A text string specifying how a call was terminated.	String	Field
Wrap Up Duration	The amount of time an agent spent after a call ended to perform after-call tasks directly associated with the call, such as entering a wrap-up code or entering customer data into a CRM system.	Long	Measure
Transfer Count	The number of times a call was transferred by an agent.	Integer	Measure

## Standard CRM Fields and Measures in the CSR and CAR

The standard CRM fields and measures aggregated in the Customer Session Repository (CSR) and Customer Activity Repository (CAR) are described in the following table.

Label	Description	Data Type	Field or Measure
Account ID	Account identifier.	String	Field
Active	Used for interaction history caching.	String	Field
Contact ID	Contact identifier.	String	Field
Contact Rel Party ID	Contact party relationship identifier.	String	Field
Created By	Standard who column—user who created this row.	String	Field
Creation Date	Standard who column—date when this row was created.	Datetime/ Long	Measure
Duration	The number of seconds that the interaction was active.	Number	Measure
End Date Time	The date and time the interaction ended.	Datetime/ Long	Measure
Interaction ID	Unique interaction identifier.	String	Field
Interaction Inters ID	Links interactions.	String	Field
Last Update Date	Standard who column—date when a user last updated this row.	Datetime/ Long	Measure

Label	Description	Data Type	Field or Measure
Last Update Login	Standard who column—operating system login of the user who last updated this row.	String	Field
Last Updated By	Standard who column—user who last updated this row.	String	Field
Lead ID	Lead identifier.	String	Field
Object ID	The primary key for the Marketing table relating to the object type (Campaign ID).	String	Field
Object Type	Marketing type of source code.	String	Field
Opportunity ID	Opportunity identifier.	String	Field
Org ID	Organization identifier.	String	Field
Org System Reference ID	Orig system reference identifier.	String	Field
Outcome ID	Outcome identifier.	String	Field
Primary Party ID	Primary party identifier.	String	Field
Reason ID	Reason identifier.	String	Field
Resource ID	Resource identifier for the agent.	String	Field
Result ID	Result identifier.	String	Field
Revenue	Revenue generated.	Number	Measure
Script ID	Script identifier.	String	Field
Service Request ID	Service request identifier.	String	Field
Source Code	Source code provided by the customer.	String	Field
Source Code ID	Unique identifier for Marketing source code.	String	Field
Start Date Time	The date and time the interaction started.	Datetime/Long	Measure
Tenant ID	Used in hosted environments.	String	Field
Wrap Up Time Amounts	The number of seconds that the agent spent on the interaction from the closing of the last media item to the conclusion of the interaction.	Number	Measure

## Standard IVR Fields and Measures in the CSR and CAR

The standard IVR fields and measures aggregated in the Customer Session Repository (CSR) and Customer Activity Repository (CAR) are described in the following table.

Label	Description	Data Type	Field or Measure
AA Duration	The amount of time in seconds that an incoming call was connected to the Auto Attendant/IVR; multiple connections to AA/IVR in a single session produce multiple records.	Long	Measure
Account Code	Account code.	String	Field
Answer Within SLT	Whether or not the call was answered within the Service Level threshold.	String	Field
Caller Name	The name of the caller as available.	String	Field
Caller Num	Caller phone number of an incoming call (extension number or off-net PSTN).	String	Field
Caller Type	Type of line for an incoming call.	String	Field
Direction	The direction of the call (incoming or outgoing).	String	Field
DNIS	DNIS number for an incoming call.	String	Field
End Priority	Call priority at End Time (1-9).	Integer	Measure
End Time	GMT end time of record's period. Seconds since 1970/01/0100:00:00.	Datetime /Long	Measure
Exit State	The state when a call was terminated.	String	Field
Hold Duration	The amount of time in seconds that a call was on hold.	Long	Measure
IVR Data	Data of IVR/AA.	String	Field
IVR Exit Point	Exit Point of IVR/AA.	String	Field
MM Call Type	Multimedia call type.	String	Field
Original Priority	The initial priority set by the system for this call (1-9).	Integer	Measure
Queue Duration	The amount of time in seconds that a call was in a queue.	Long	Measure
Record Duration	The duration in seconds of recording.	Long	Measure
Ring Duration	The amount of time in seconds that a call was ringing and in workgroup queue.	Long	Measure
Sequence ID	A unique number to identify multiple segments of the same call (same session ID).	String	Field
Session ID	Session identifier.	String	Field
Start Priority	Call priority at Start Time (1-9).	Integer	Measure
Start Time	GMT start time of record's period. Seconds since 1970/01/01.	Datetime /Long	Measure

Label	Description	Data Type	Field or Measure
Talk Duration	The duration in seconds of talk time.	Long	Measure
Target Name	Name for a called target.	String	Field
Target Tenant	Tenant name for a called target.	String	Field
VM Duration	The amount of time in seconds after a call went into a voice mailbox; includes greeting, false attempts at messages, successful message, and review of message.	Long	Measure

## Standard AAR and ASR Fields and Measures

The standard fields and measures aggregated in the Agent Activity Repository (AAR) and Agent Session Repository (ASR) are described in the following table.

Label	Description	Data Type	Field or Measure
Activity Span	The amount of time in seconds that the agent was engaged in the activity during the specified compute interval.	Long	Measure
Agent DN	The dial number the agent used to log in to the Agent Desktop.	String	Field
Agent ID	A string that identifies an agent.	String	Field
Agent Session ID	A string that identifies an agent's login session.	String	Field
Channel ID	The ID assigned to a media channel.	String	Field
Consult Call ID	A string that identifies a consult call.	String	Field
Current State	The current state of the agent. This field is available only in the ASR and only for realtime visualizations.	String	Field
Duration	The amount of time during which the agent was engaged in the activity.	Long	Measure
End Time	The time the activity ended.	Datetime /Long	Measure
Idle Code ID	A string that identifies an Idle code.	String	Field
Idle Code Name	The name of an Idle code.	String	Field
Queue ID	A string that identifies a queue.	String	Field
Site ID	A string that identifies a call center location.	String	Field
Start Time	The time the activity started.	Datetime /Long	Measure

Label	Description	Data Type	Field or Measure
Status	Differentiates login from logout. The status of all agent activities is LoggedIn except for the Logout event.	String	Field
Team ID	A string that identifies a team.	String	Field
Type	The agent state, such as Available, Connected, Idle, and Wrapup.	String	Field
Wrap Up Code ID	A string that identifies a wrap-up code.	String	Field
Wrap Up Code Name	The name of a wrap-up code.	String	Field





# Running and Scheduling Visualizations and Dashboards

This chapter describes how to run the visualizations and dashboards available in your enterprise's repository and how to schedule them to run on a periodic basis and associate them with an email list for automatic distribution.

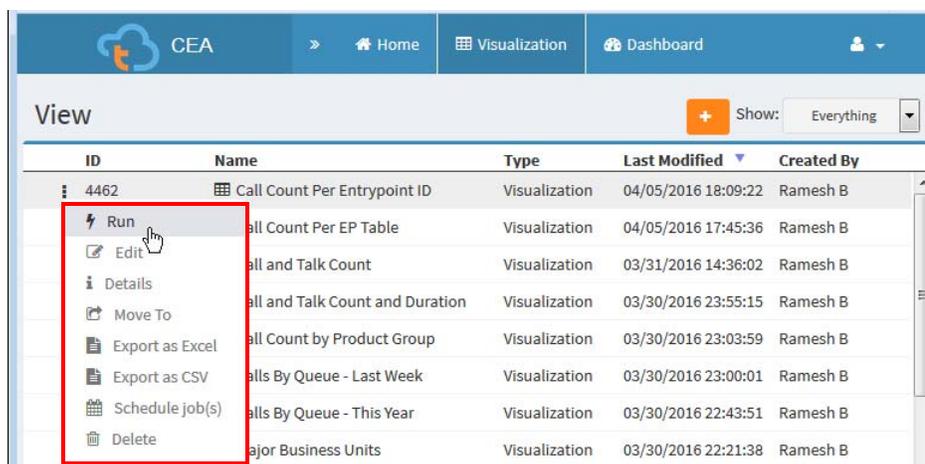
Topics covered in this chapter:

- [Running a Visualization or Dashboard](#)
  - [Drilling Down to a Portion of the Visualization](#)
  - [Modifying Visualization Attributes](#)
  - [Changing the Visualization Output Format](#)
- [Scheduling a Visualization or Dashboard](#)

## Running a Visualization or Dashboard

To run a visualization or dashboard:

1. On the Analyzer title bar, click **Visualization** or **Dashboard**.
2. Navigate to the visualization or dashboard you want to run and double-click it or click the  button to the left of a listed visualization or dashboard and select **Run** from the context menu.

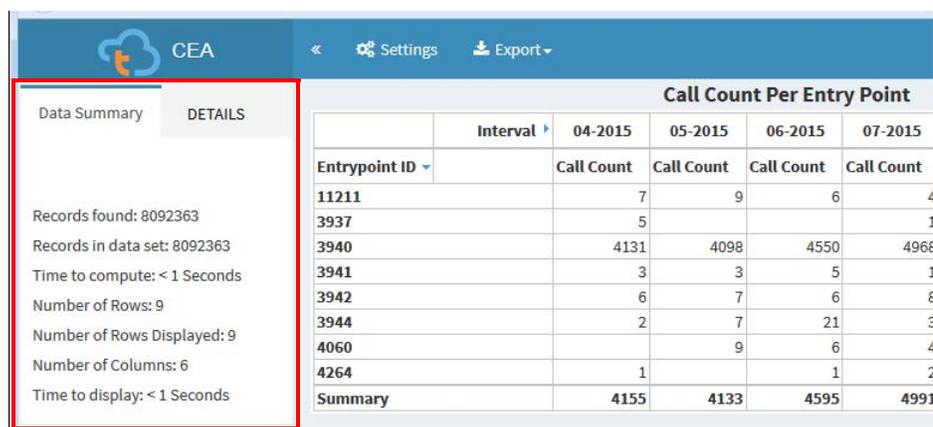


The visualization or dashboard loads in a separate tab or window.

While a visualization is loading, a pop-up window appears briefly with details about the data that meet the visualization parameters, including the number of records found, the number of records in the data set, and the number of rows and columns.

3. After the visualization is rendered, you can click the >> button on the Analyzer title bar to redisplay the data set details in a two-tabbed panel. Then you can click the << button to close the panel.

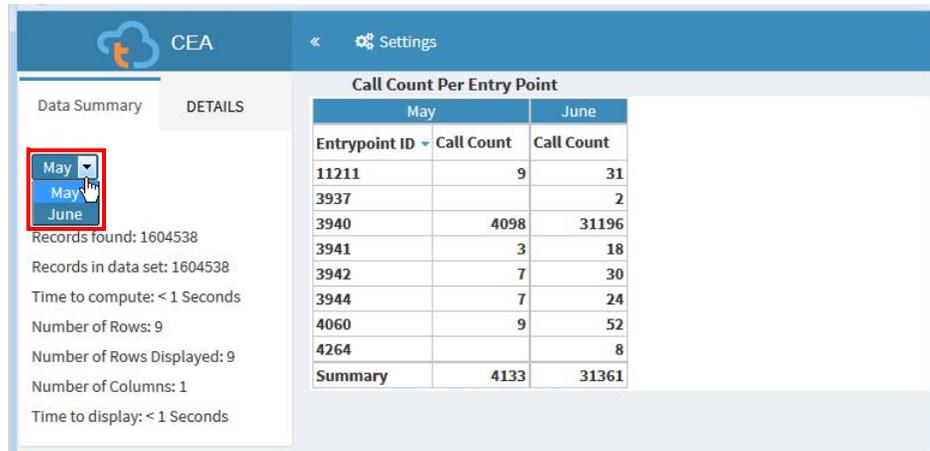
For a realtime visualization, the **Data Summary** tab also displays the time the data was last refreshed.



Call Count Per Entry Point					
	Interval	04-2015	05-2015	06-2015	07-2015
Entrypoint ID	Call Count	Call Count	Call Count	Call Count	
11211	7	9	6	4	
3937	5				1
3940	4131	4098	4550	4966	
3941	3	3	5	1	
3942	6	7	6	8	
3944	2	7	21	3	
4060		9	6	4	
4264	1		1	2	
Summary	4155	4133	4595	4991	

Data Summary | DETAILS  
 Records found: 8092363  
 Records in data set: 8092363  
 Time to compute: < 1 Seconds  
 Number of Rows: 9  
 Number of Rows Displayed: 9  
 Number of Columns: 6  
 Time to display: < 1 Seconds

If you are running a compound visualization, the Data Summary tab displays a drop-down list of all the modules in the visualization so you can display the details for each individual module.



The screenshot shows the CEA interface with the 'Data Summary' tab selected. A dropdown menu is open, showing 'May', 'May', and 'June'. Below the dropdown, statistics are listed: Records found: 1604538, Records in data set: 1604538, Time to compute: < 1 Seconds, Number of Rows: 9, Number of Rows Displayed: 9, Number of Columns: 1, Time to display: < 1 Seconds. The main table is titled 'Call Count Per Entry Point' and has columns for 'May' and 'June'. The table data is as follows:

Entrypoint ID	May	June
11211	9	31
3937		2
3940	4098	31196
3941	3	18
3942	7	30
3944	7	24
4060	9	52
4264		8
<b>Summary</b>	<b>4133</b>	<b>31361</b>

- Click the **Details** tab to display the following settings and panels. Click a panel title to expand or collapse the panel. If you are running a compound visualization, the details are displayed separately, depending on which module is selected in the drop-down list at the top of the tab.

- **Start Time**

Displays either the time period for a historical visualization or *Realtime* for a realtime visualization.

- **Compute**

For a realtime visualization, specifies *Duration* and *Refresh Rate*. You can select a value from the drop-down list to change the time interval for refreshing the data. Possible values for **Duration**:

- **None.** Provides a view of current activity.
- **5, 10, 15, or 30 minutes.** Provides a view of everything that happened from up to 30 minutes ago to the current moment.
- **Start of Day.** Provides a view of everything that happened since midnight.

For a time-based historical visualization, specifies the compute interval and the number of records to be considered in the visualization.

For a sample-based visualization, specifies the frequency, band, and whether or not the calculations are cumulative (see “[Settings for a Sample-Based Visualization](#)” on page 58).

An additional panel is present for each field to which a filter has been applied, so you can see which values have been filtered in or out of the visualization.

Following is an example of the Details tab for a historical visualization.

Click a panel title bar to expand or collapse a panel.

Call Count Per Entry Point						
	Interval	04-2015	05-2015	06-2015	07-2015	08-2015
Entrypoint ID	Call Count					
11211		7	9	6	4	1
3937		5			1	1
3940		4131	4098	4550	4968	3588
3941		3	3	5	1	
3942		6	7	6	8	2
3944		2	7	21	3	
4060			9	6	4	4
4264		1		1	2	1
Summary		4155	4133	4595	4991	3597

5. If the visualization is in table format, you can click a table cell and then click the **Zoom** icon to see all the records that were involved in the computation of that portion of the visualization. Then you can perform further analytics on the data set as described in “Drilling Down to a Portion of the Visualization” on page 27.

6. If the visualization is in a chart format:

- The underlying table used to construct it is displayed beneath the chart. Click the **Hide Table** link to hide the table, and the **Show Table** link to redisplay it.
- Rest your pointer over a bar, line, slice, area, or bubble in the chart to display information about the segment that the item represents.

Rest your pointer over a bar in the chart to display information about the segment that the bar represents.

Click this link to hide the underlying table.

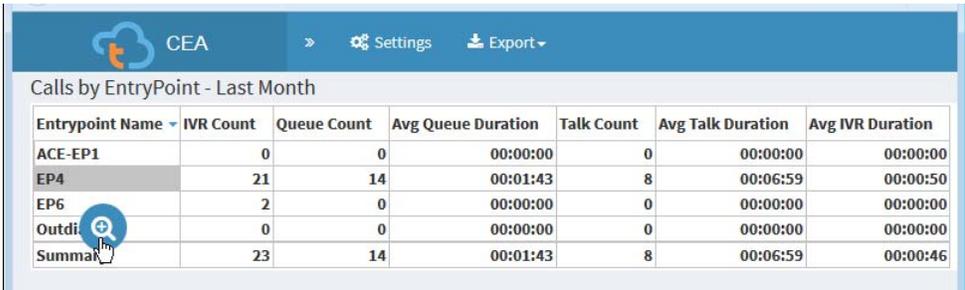
7. Click the **Settings** button on the title bar to display controls for changing the output format and modifying some of the visualization attributes as described in the following topics:
  - [Modifying Visualization Attributes](#)
  - [Changing the Visualization Output Format](#)
8. If the visualization is historical, you can click the **Export** button on the title bar to export the visualization as a Microsoft Excel or CSV file. Realtime and compound visualizations cannot be exported.

## Drilling Down to a Portion of the Visualization

After you run a visualization in table format, you can drill down into a specific visualization component to see all the records that were involved in the computation of that portion of the visualization and perform further analytics on the data set.

To drill down on a visualization:

1. Click a table cell and then click the **Zoom**  icon that appears.



Entrypoint Name	IVR Count	Queue Count	Avg Queue Duration	Talk Count	Avg Talk Duration	Avg IVR Duration
ACE-EP1	0	0	00:00:00	0	00:00:00	00:00:00
EP4	21	14	00:01:43	8	00:06:59	00:00:50
EP6	2	0	00:00:00	0	00:00:00	00:00:00
Outdi	0	0	00:00:00	0	00:00:00	00:00:00
Summary	23	14	00:01:43	8	00:06:59	00:00:46

The Drill Down panel loads inside the visualization window, displaying the records that were involved in the computation of that portion of the visualization and providing controls for performing additional analytics on the data set.

To add a segmentation variable, click the **Fields** or **Measures** box to expand it, and then click a field or measure.

Click to export the visualization data.

Click to open the Drill Down panel in a separate window.

The screenshot shows a 'Drill Down' panel with the following data table:

ID	Entrypoint Name	IVR Count	Queue Count	Queue Duration	Talk Count	Talk Duration
1	EP4	1	1	2805	1	3980
2	EP4	1			1	2087
3	EP4	1	1	28219		
4	EP4	1	1	7606	1	2277139
5	EP4	1			1	165596
6	EP4	1			1	874908
7	EP4	1				
8	EP4	1	2	169991		
9	EP4	1	2	305049		
10	EP4	1				

- To add a segmentation variable and view the profiling variables computed for the data set, click the **Fields** or **Measures** box to expand it, and then click the field or measure you want to add.
- To export the data as a Microsoft Excel or CSV file, click the **Export** button in the upper-right corner of the Drill Down panel.
- To open the Drill Down panel in a separate window, click the  icon in the upper-right corner of the panel.

## Modifying Visualization Attributes

After running a visualization, you can modify its attributes and rerun it:

1. Click the **Settings** button on the title bar to display the visualization controls.

To hide the controls, click the **Settings** button again.

The screenshot shows the settings for a visualization titled "Call Count Per Entry Point". The interface includes several control sections:

- Profile Variables:** Call Count (checked), Talk Count (unchecked), Avg Talk Duration (unchecked).
- Hidden Segments:** Queue ID (checked).
- Column Segments:** Profile Variables (selected), Interval (selected).
- Row/Series Segments:** Entrypoint ID (checked).

The main table displays call counts for various entry points across months from 04-2015 to 08-2015. A 'Summary' column is present at the end of each row.

Entrypoint ID	Call Count					Summary
	04-2015	05-2015	06-2015	07-2015	08-2015	Call Count
11211	7	9	6	4	1	27
3937	5			1	1	7
3940	4131	4098	4550	4968	3588	21335
3941	3	3	5	1		12
3942	6	7	6	8	2	29
3944	2	7	21	3		33
4060		9	6	4	4	23
4264	1		1	2	1	5

2. To hide or show row and column summaries, select or clear the **Hide Summary** check box. Note that a visualization typically takes less time to run when **Hide Summary** is selected.
3. If you want the visualization to be updated immediately whenever you make a change, select the **Redraw instantly** check box. Otherwise, the visualization will be updated only when you click the **Apply** button.

**Note:** Changes are always rendered immediately when you filter a segment and when you show or hide a profile variable.

4. To show or hide a profile variable, select or clear the profile variable check box. In the above illustration, two profile variables are hidden.
5. To hide a segment, drag it to the **Hidden Segments** box. This capability is not available for compound visualizations.
6. To reposition a segment, drag it to a different location either within its current Segments box or to a different Segments box. This capability is not available for compound visualizations.

In the following example of a table visualization:

- The check boxes for all of the visualization’s profile variables are selected.
- Two segments have been moved to the **Hidden Segments** box.
- The **Interval** segment has been moved from **Column Segments** to **Row/ Series Segments**.

Interval	Call Count	Talk Count	Avg Talk Duration
04-2015	4155	3553	229333.93
05-2015	4133	3463	205171.83
06-2015	4595	3773	180868.14
07-2015	4991	4214	172404.60
08-2015	3597	1886	181008.88
<b>Summary</b>	<b>21471</b>	<b>16889</b>	<b>192262.56</b>

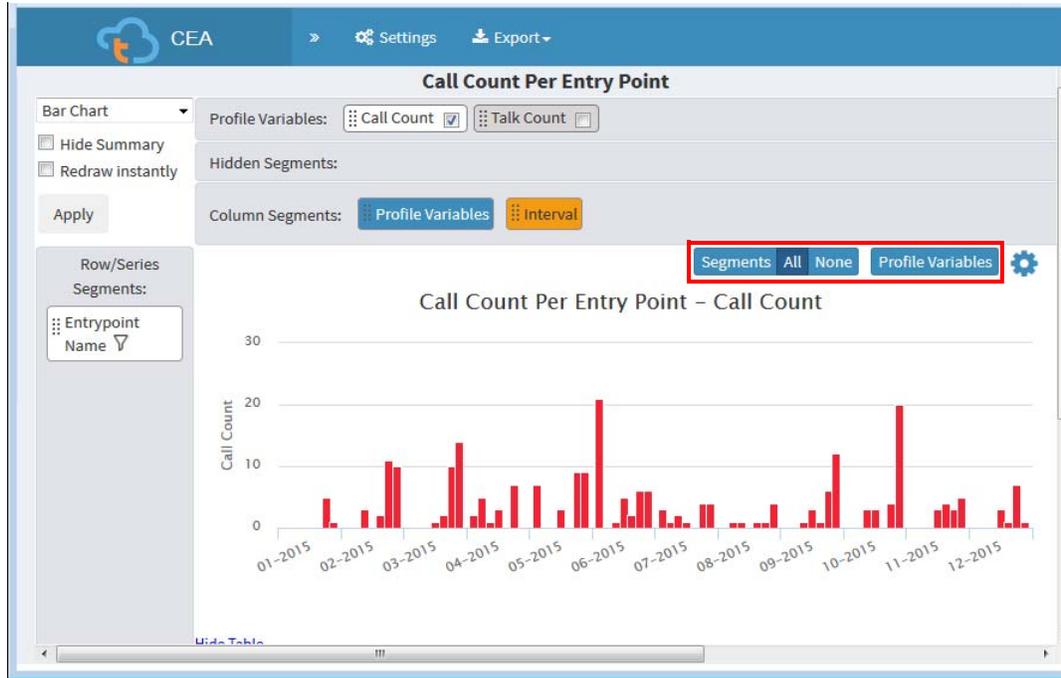
7. To filter a segment (this capability is not available for compound visualizations):
  - a. Click the  icon to the right of the segment name.
  - b. Select the **is in** or **is not in** button, and then specify the values you want to include or exclude (see “Filtering Using a Field” on page 59 for more information).

- OR -

Select the **regular expression** button, and then enter a regular expression in the text box that appears to specify which values to include or exclude.

**Note:** The *Interval* segment can be filtered only if the **Hide Summary** check box is selected.

8. If the visualization is a chart, additional controls on the upper right side of the chart enable you to modify the chart without modifying the underlying table. Click the  icon to hide or show the controls.



<b>Segments</b> drop-down list	Select one or more segments from this drop-down list to remove them from both the chart and the chart legend. Select the segments from the drop-down list a second time to restore them in both the chart and legend
<b>All</b> button	Click to display all segments in both the chart and legend.
<b>None</b> button	Click to remove all segments from the chart and legend.
<b>Profile Variables</b> drop-down list	Select one profile variable or select <b>All</b> from this drop-down list to include either the selected profile variable or all profile variables in the chart.  Only one profile variable can be selected for a pie chart.

## Changing the Visualization Output Format

To change the visualization output format after you run a visualization:

1. Click the **Settings** button on the Analyzer title bar to display the visualization controls.
2. Select a format from the drop-down list. Each format is briefly described in the following table.

The screenshot shows the CEA interface with the 'Call Count Per Entry Point' visualization. The 'Table' format is selected in the drop-down menu. The table displays data for various entry points across different months in 2015.

Entrypoint ID	Call Count						
	04-2015	05-2015	06-2015	07-2015	08-2015	04-2015	05-2015
11211	7	9	6	4	1	4	
3937	5			1	1	4	
3940	4131	4098	4550	4968	3588	3541	34
3941	3	3	5	1		1	
3942	6	7	6	8	2	0	
3944	2	7	21	3		2	

Format	Description
Table	Displays data in rows and columns.
Heat Map	Displays the cell values within a table in different shades of red. The cells in white and the darkest shade of red identify the outliers.
Row Heat Map	Displays the cell values within each row in a table in different shades of red, with the darkest shade identifying the highest values within a row.
Column Heat Map	Displays the cell values within each column in a table in different shades of red, with the darkest shade identifying the highest values within a column.
Line Chart	Compares values as points connected by lines.
Bar Chart	Compares values displayed as horizontal columns.
Area Chart	Compares values displayed as shaded areas.
Pie Chart	Compares values displayed as slices of a circular graph.
Motion Chart	Compares values over time displayed as animated bubbles, lines, or bars. Requires Adobe Flash Player.  Motion charts are not available for realtime visualizations.
Sparkline Chart	Table-based rendering of variations of data displayed in a highly condensed way as miniature charts in table cells, enabling you to easily spot trends.

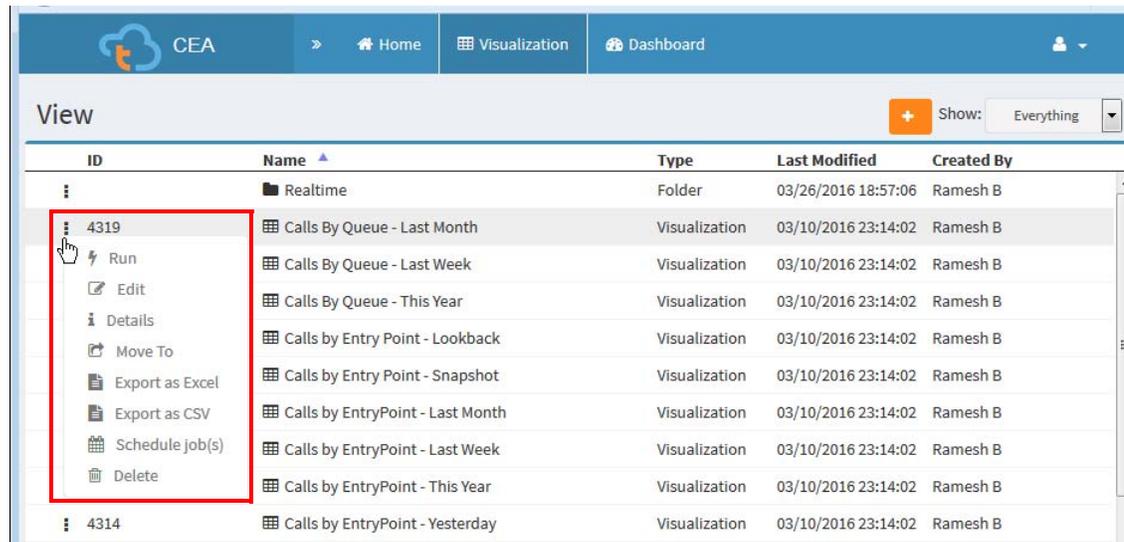
## Scheduling a Visualization or Dashboard

You can schedule a visualization or dashboard to run on a periodic basis and associate it with an email list for automatic distribution. The email will contain a link that recipients can click to display the visualization or dashboard on a Web page or, in the case of a visualization, the output can be sent as an attached CSV file.

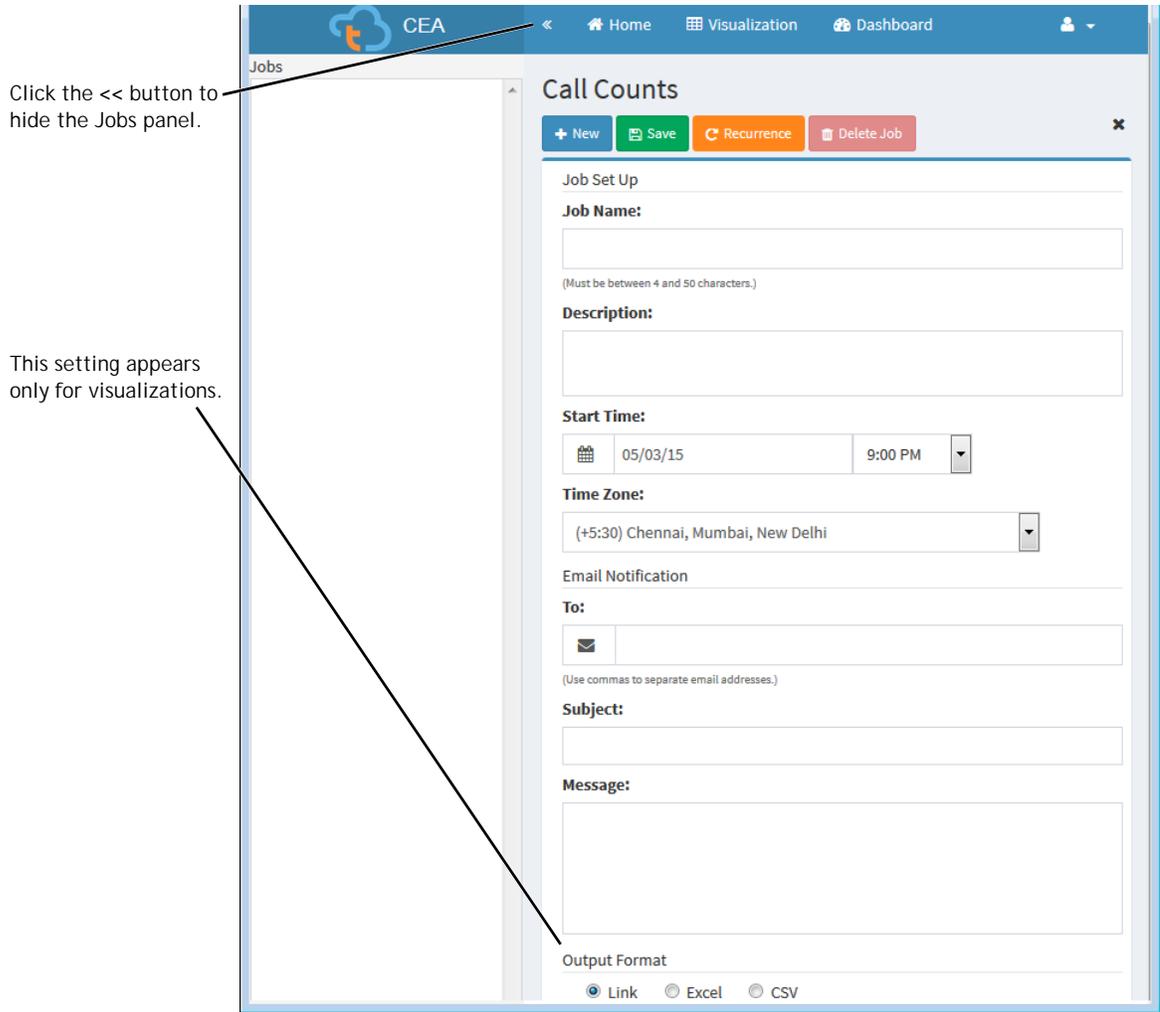
**Note:** Realtime and compound visualizations cannot be scheduled.

To schedule a visualization or dashboard:

1. On the Analyzer title bar, click **Visualization** or **Dashboard**.
2. On the View page, navigate to the item you want to schedule, click the  button to the left of the listed item, and select **Schedule Job(s)** from the context menu.



3. The **Jobs** panel on the left side of the page displays a list of schedules that have been created for the selected visualization or dashboard.
  - To create a new schedule, specify settings in the panel on the right or, if a schedule is selected in the **Jobs** panel, click the **New** button and then specify the settings.
  - To edit an existing schedule, select a schedule listed in the **Jobs** panel and then edit the settings displayed in the panel on the right.



Setting	Description
Job Set Up	<p><b>Job Name:</b> Enter a name for the schedule. After saving the schedule, you cannot change the name.</p> <p><b>Description:</b> Optionally enter a description for the schedule.</p> <p><b>Start Time:</b> Select a start date from the calendar and a start time from the drop-down list.</p> <p><b>Time Zone.</b> Select a time zone for the schedule from the drop-down list.</p>
Email Notification	<p><b>To:</b> Enter the email addresses, separated by commas, of recipients to whom email notification will be sent.</p> <p><b>Subject:</b> Enter a subject line for the email.</p> <p><b>Message:</b> Optionally enter a message to be included in the email.</p>

Setting	Description
Output Format	<p>If you are scheduling a visualization, specify how you want the visualization output to be sent:</p> <ul style="list-style-type: none"> <li>• <b>Link</b>. A link to the visualization output will be sent with the email notification.</li> <li>• <b>CSV</b>. The visualization output will be attached to the email notification as a CSV file.</li> </ul>

4. If you want the visualization or dashboard to run more than once, click the **Recurrence** button at the top of the page, and in the dialog box that appears:
  - a. Specify the frequency (**Daily**, **Weekly**, **Monthly**, **Yearly**) with which the job will recur, and then select the options for the frequency.
  - b. Specify the range of recurrence: no end date, end after a specified number of occurrences, or end by a specified date.
  - c. Click **OK** to close the dialog box and save your settings.

5. Click **Save**. The schedule is listed in the Jobs panel on the left side of the page.



# ... 4

## Designing Visualizations

This chapter describes how to create visualizations using an intuitive drag-and-drop interface. After you specify and save the visualization content, you can click a button to preview the output in a separate window.

Topics covered in this chapter:

- [Visualization Creation Overview](#)
- [Creating a Visualization](#)
- [Creating a Compound Visualization](#)
- [Creating a Visualization Displaying Actual Values](#)
- [Creating and Sharing an Enhanced Field](#)
- [Settings for a Sample-Based Visualization](#)
- [Selecting a Formula for a Measure](#)
- [Defining Filters](#)
- [Creating a Profile Variable Based on a Another Profile Variable](#)
- [Creating and Using Shared Formulas](#)
- [Creating and Formatting a Visualization Title](#)
- [Formatting a Table](#)
- [Formatting a Profile Variable](#)
- [Formatting a Chart](#)
- [Editing the Visualization Name](#)

See also “Sample Visualizations” beginning on [page 71](#) and “Mappings of ACD Metrics to Analyzer Parameters” beginning on [page 77](#).

## Visualization Creation Overview

Creating a visualization involves the following steps:

- 1. Specify the visualization type:**
  - **Customer Session Record**
  - **Customer Activity Record**
  - **Agent Activity Record**
  - **Agent Session Record**
- 2. Choose a Date Range.** Specify the time period that you want the visualization to cover. This constrains the number of records that will be considered during execution of the visualization.
- 3. Define the Compute Interval.** The compute interval for a historical report can be either time based or sample based.
  - For a **time-based** visualization, select a time interval.
  - For a **sample-based** visualization, specify the total number of records to be considered, the *frequency* (that is, the number of records to be considered in each interval) and the *band* (that is, the number of records to be considered in each calculation), and whether or not the calculations will be cumulative.
- 4. Define the Segmentation.** Specify what you are trying to compare as part of the visualization. It could be comparing the performance of the different agents or entry points. The Analyzer allows segmentation only by fields and not by measures. For example, segmentation by *Termination Type* or *Agent Name* is allowed, while segmentation by *Call Count* is not allowed.
- 5. Define the Profiling Variables.** Define the metrics you want to see in the visualization to compare the different segments. Profiling variables are always numeric values and can be created from either fields, measures, or other profiling variables.
  - **Field.** Fields can be used to create counts of records that meet specified conditions. For example, you can create a profiling variable that will give the count of records with a *Termination Type* equal to *normal*.
  - **Measure.** Measures can be used to create summations, averages, or counts. Summations and averages require no additional input. Counts work the same as fields, and thus require conditions to be specified. For example, using Revenue as the basis for a profiling variable allows you to create a sum of the Revenue, an average of the Revenue, or a count of records that have a Revenue greater than, less than, or equal to a given amount.

- **Existing Profile Variable.** Profiling variables can be created from other profiling variables using arithmetic formulas. For example, if you already have a profiling variable named *Average Revenue* containing the average of Revenue and another profiling variable named *Handled Calls* containing the count of records where *Termination Type* equals *normal*, then you can create a profiling variable containing the average revenue per call using *Average Revenue* divided by *Handled Calls*.
6. **Define the Filter.** This step further limits the population set to include only the records that meet the conditions you specify. For example, you could create a filter specifying that only information specific to a set of entry point names (say EP\_01 and EP\_02) are to be considered in the visualization.
  7. **Define the Output Format.** A visualization can be displayed as a table or chart. The chart types currently supported are Bar, Pie, Line, Area, and Motion. Additionally, you can specify display options such as titles, colors, and border widths and styles.
  8. **Define execution (Schedule/Recurrence).** Visualizations can be executed on demand, scheduled for a one-time execution, or scheduled to run periodically. Scheduled executions post their results to the specified email recipients using either a web link or CSV file attachment.
    - **Execute now:** Use *Preview* from the visualization creation page or *Run* from the view page.
    - **Execute once and email:** Use *Scheduler* and define time and email information.
    - **Recurrence:** Use *Scheduler* and define recurrence, such as daily at 9:00 AM.

## Creating a Visualization

See also “Creating a Visualization Displaying Actual Values” on page 53.

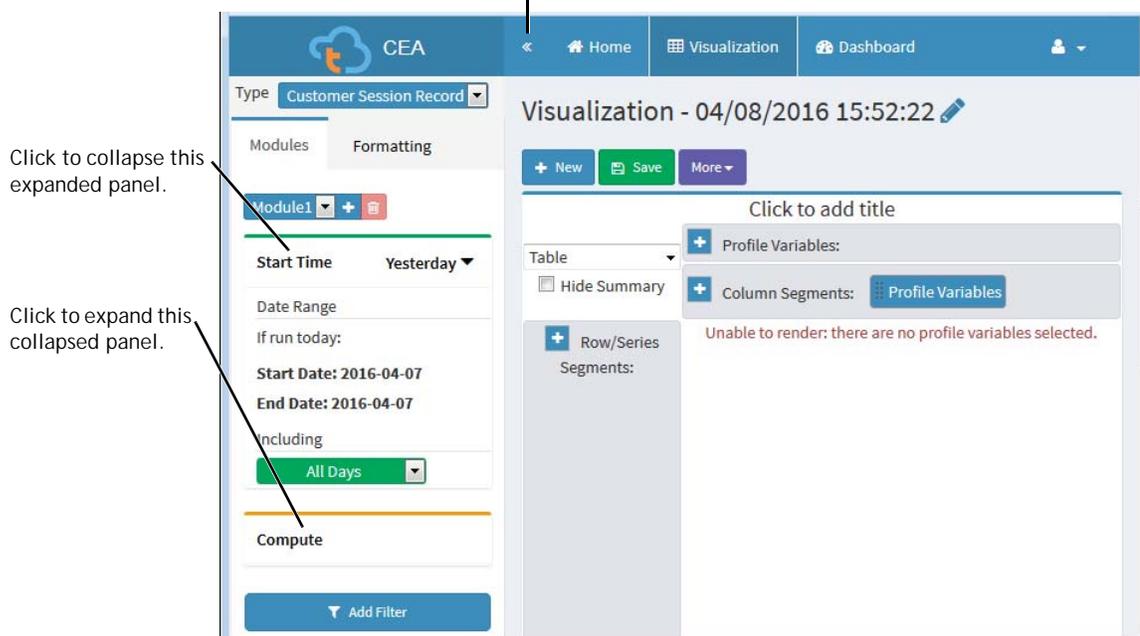
To create a visualization:

1. On the Analyzer title bar, click **Visualization**, and on the **View** page that appears, click **Create New Visualization**.

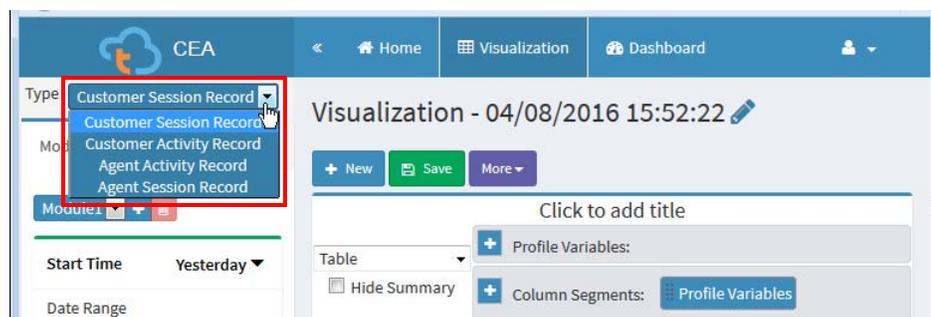
The visualization creation page appears. The left side of the page displays the *Type* drop-down list and the *Modules* and *Formatting* tabs.

The Modules tab displays two panels that you can expand or collapse by clicking a panel title.

Click the << button to hide the side panel. Then you can click the >> to restore the panel.

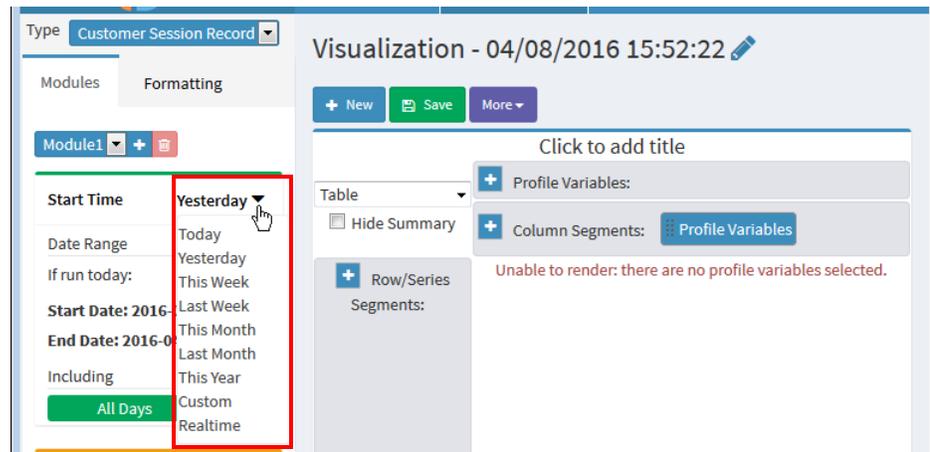


2. Select an option from the **Type** drop-down list on the upper left side of the page to specify the visualization type: **Customer Session Record**, **Customer Activity Record**, **Agent Activity Record**, or **Agent Session Record**.



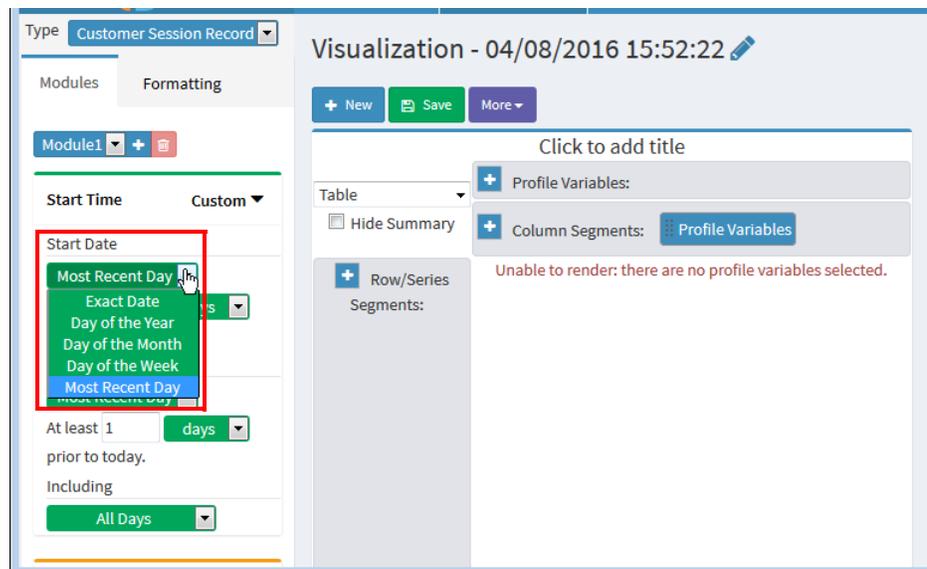
- Specify the visualization time period by selecting an option from the **Start Time** drop-down list in the **Modules** tab.

To create a realtime visualization, select **Realtime**. To create a historical visualization, select either a predefined date range or select **Custom** to specify custom start and end dates.



If you selected **Realtime**, skip to step 7.

If you selected **Custom**, select values from the **Start Date** and **End Date** drop-down lists.



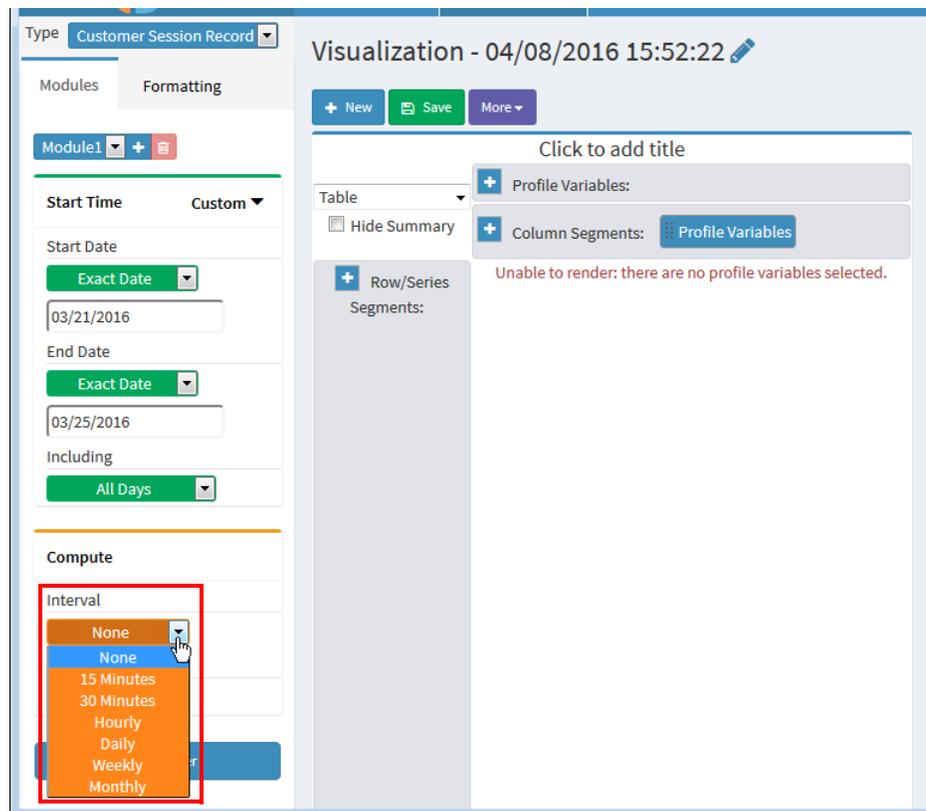
- If you selected **Exact Date**, enter a date in the field that appears, or click in the field and then select a date from the calendar controls.
- If you selected one of the other options (**Day of the Year**, **Day of the Month**, **Day of the Week**, or **Most Recent Day**), use the controls that appear to select the options you want.

**Notes:**

- If you specify a lengthy date range, the visualization could take a long time to run. In this case, it might be preferable to schedule the visualization rather than running it in real time (see “Scheduling a Visualization or Dashboard” beginning on page 33).
- If the pre-defined date range you want to select is not available in the drop-down list, increase the compute interval. Small compute intervals (such as *Hourly*) with large date ranges (such as *Last Month*) result in more data than can be displayed; thus such selections are not allowed.

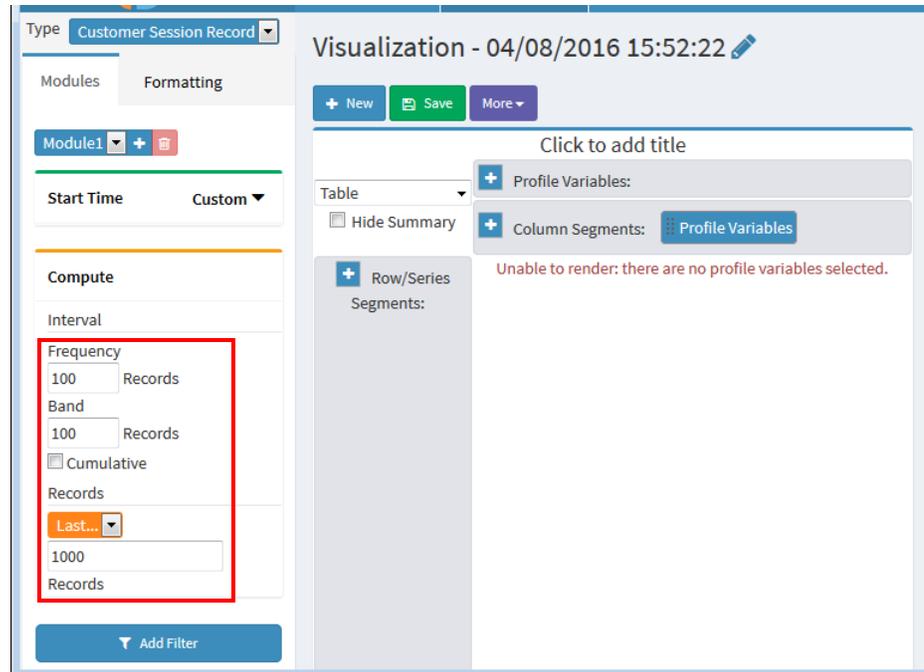
4. You can filter the date range by selecting an option from the **Including** drop-down list (**Days of a Week**, **Days of the Month**, **Weeks of the Month**, or **Months of the Year**) and then selecting the weekdays, days of the month, weeks, or months you want the visualization to include.
5. If you are creating a time-based visualization, select a time interval from the **Interval** drop-down list in the **Compute** panel (**None**, **15 Minutes**, **30 Minutes**, **Hourly**, **Daily**, **Weekly**, or **Monthly**).

The available options vary depending on the length of the date range. Small compute intervals (such as *15 Minutes*, *30 Minutes*, or *Hourly*) are not available if the specified date range is lengthy (such as *Last Month*).



6. If you are creating a sample-based visualization, select **First** or **Last** from the **Records** drop-down list in the **Compute** panel, and in the text box, enter the total number of records to be considered in the visualization.

In the three additional settings that appear, enter the number of records to be considered per interval (**Frequency**) and the number of records to be considered per calculation (**Band**), and select the **Cumulative** check box if you want the calculations to be cumulative. For more information, see “Settings for a Sample-Based Visualization” on page 58.



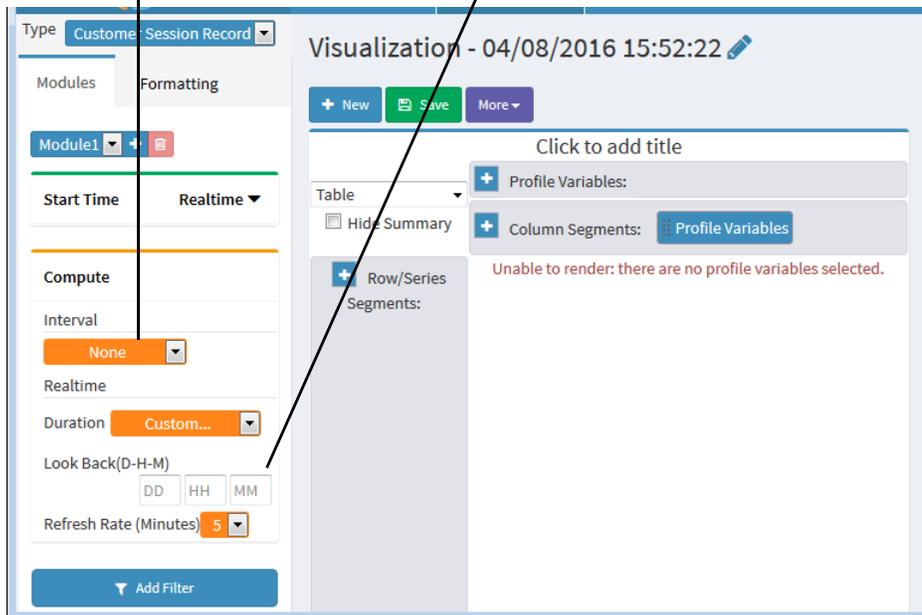
7. If you selected **Realtime** as the visualization time period, select values from the drop-down lists that become available in the **Compute** panel.

<b>Duration</b>	<p>Select <b>None</b> for a snapshot of the current contact center activity.</p> <p>- OR -</p> <p>Select a specific time interval (of 5, 10, 15, or 30 minutes) for a view that looks back from the current moment to the most recent 5, 10, 15, or 30 minutes.</p> <p>- OR -</p> <p>Select <b>Start of Day</b> for a view of everything that happened since midnight.</p> <p>- OR -</p> <p>Select <b>Custom</b> for a view that looks back from the current moment to up to fourteen days in the past.</p>
<b>Refresh Rate</b>	<p>Select a value to specify how often the data in the visualization will be refreshed: minutes for duration of <i>Start of Day</i> and <i>Custom</i>; otherwise, seconds.</p>

<b>Interval</b>	If <b>Start of Day</b> or <b>Custom</b> is specified as the <i>Duration</i> , the Interval drop-down list appears, enabling you to select a time interval ( <b>None</b> , <b>15 Minutes</b> , <b>30 Minutes</b> , or <b>Hourly</b> ).
<b>Look Back (D-H-M)</b>	If <b>Custom</b> is specified as the <i>Duration</i> , the Look Back settings appear. Enter the number of days, hours, and minutes from the current moment you want the visualization to look back to. You can specify up to 14 days.

The Interval setting appears only if Duration is set to **Start of Day** or **Custom**.

Look Back settings appear only if Duration is set to **Custom**.

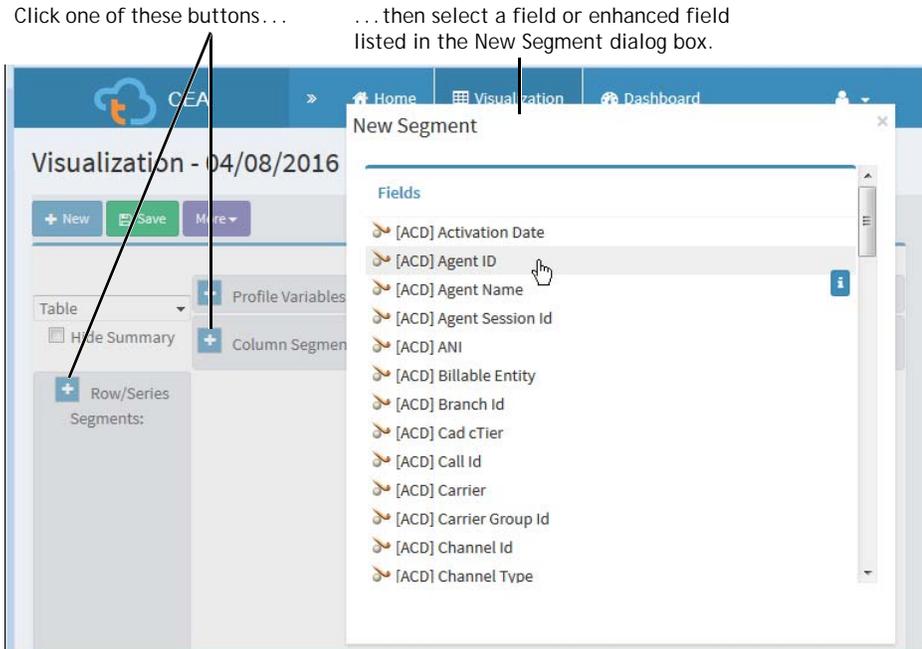


- To specify the segmentation, click the **Add +** button on the left side of the **Column Segments** or **Row/Series Segments** box, and then select a field or enhanced field listed in the **New Segment** dialog box that appears. Repeat this step for each segment you want to add. (For information about enhanced fields, see “Creating and Sharing an Enhanced Field” on page 54.)

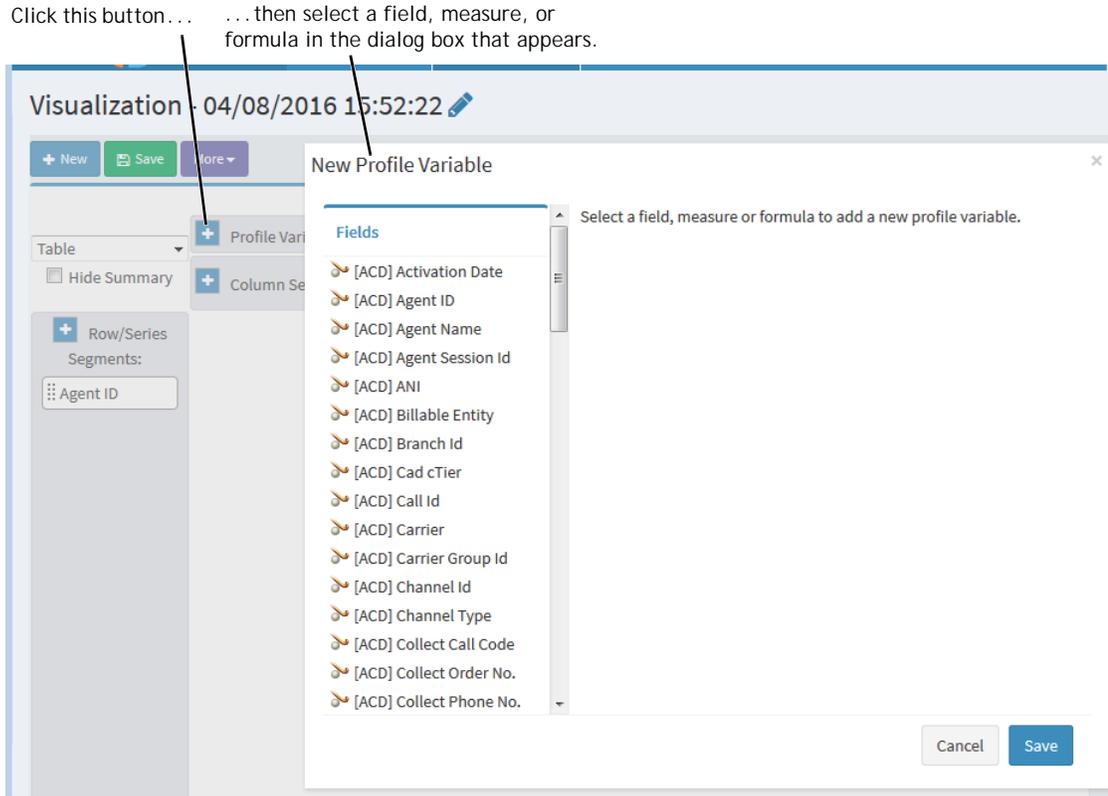
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**Note:** For charts, only the first segment is used.

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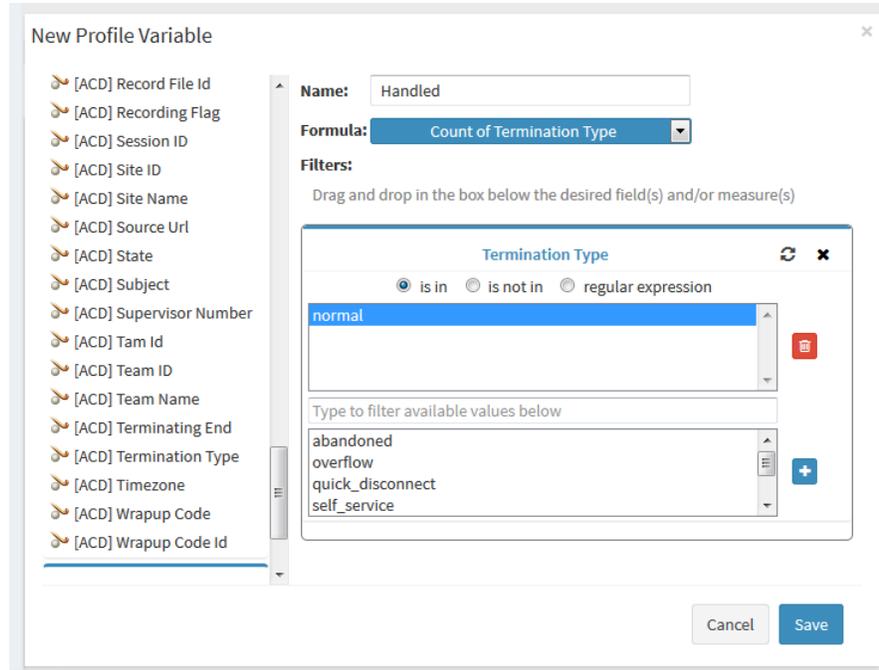
9. If you want to combine multiple values of the segmentation variable into one group, you can create an enhanced field:
  - a. Right-click the segment and select **Create Enhanced Field**.
  - b. Specify the settings for one or more groups in the dialog box that appears. For example, you could create three groups of entry points where each group represents a different product line or a different business unit. See [“Creating and Sharing an Enhanced Field”](#) on page 54 for more information.
10. To create a profile variable:
  - a. Click the **Add +** button on the left side of the **Profile Variables** box, and then select a field, measure, or formula listed in the New Profile Variable dialog box that appears.



b. If you selected a field or measure, do the following in the settings that appear on the right side of the dialog box.

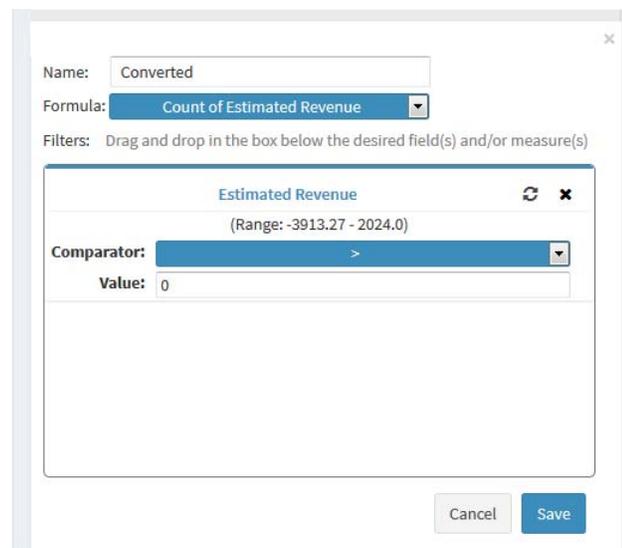
- Type a name for the profile variable in the **Name** text box or leave the default text. This name will be displayed in the column header and axis labels.
- If you used a *field* to create the profile variable, you can specify the records you want included in the count by dragging an item from the Fields list to the Filters area of the New Profile Variable dialog box and selecting the records to include or exclude (see [“Filtering Using a Field” on page 59](#)).

In the following example, a profile variable named *Handled* is defined as the count of records with a Termination Type of *normal*.



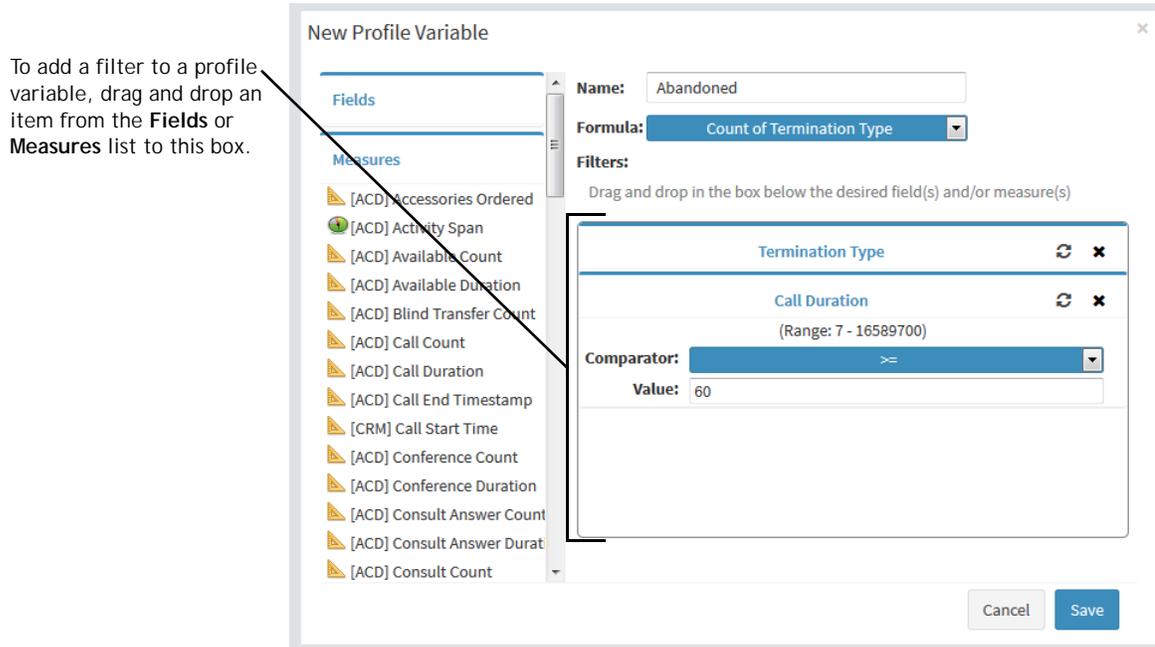
- If you used a *measure* to create the profile variable, select the computation you want to perform from the **Formula** drop-down list (see “[Selecting a Formula for a Measure](#)” on page 58). Then you can specify a condition for including records by dragging an item from the Fields or Measures list to the Filters area of the dialog box (see “[Filtering Using a Measure](#)” on page 60).

In the following example, a *Converted* profile variable is created by counting the records with *Estimated Revenue* greater than zero.



- c. You can add additional filters to a profile variable by dragging items from the Fields or Measures list to the Filters area of the dialog box and specifying which records to include or exclude or, in the case of a measure, the condition for including records.

In the following example, an *Abandoned* profile variable is defined as the count of records with a Termination Type of *abandoned* and a Call Duration of greater than 60 seconds.



- d. Click **Save** to close the New Profile Variable dialog box and add the profile variable to the visualization.

The profile variable appears in the visualization area displaying simulated values.

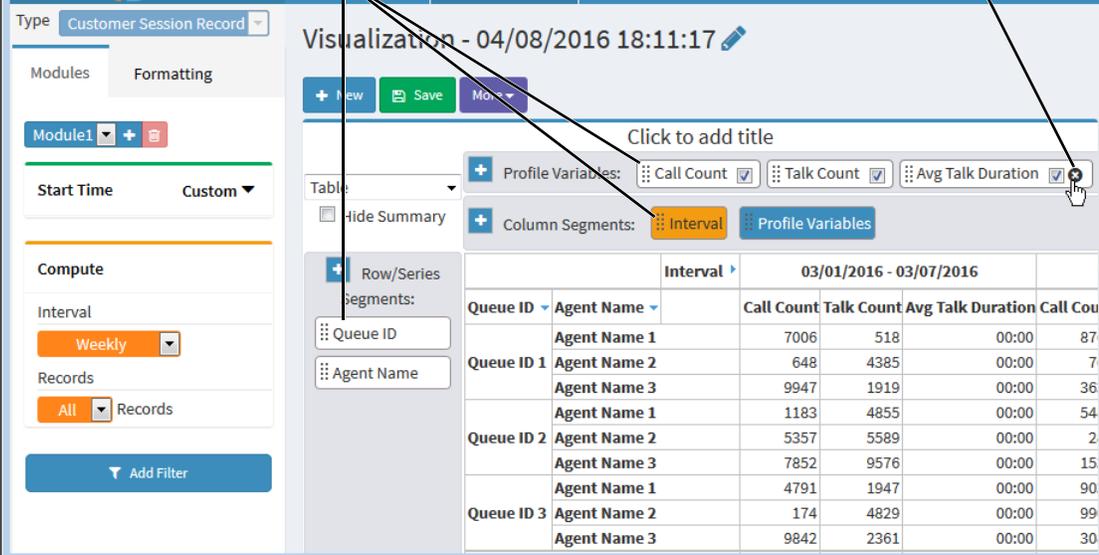
11. You can create a new profile variable based on a profile variable that exists in the visualization. For example, you could create a profile variable showing the conversion rate for each record by dividing the *Converted* value by the *Handled* value (see “[Creating a Profile Variable Based on a Another Profile Variable](#)” on page 61).
12. To specify the format for the profile variable, right-click the profile variable and select a **Number Format** option from the context menu (see “[Formatting a Profile Variable](#)” on page 66). For example, if you created a *Conversion Rate* profile variable, you could select *Percentage* as the format.

13. Continue creating as many profile variables as you want. In the following example, three profile variables have been created and the data is segmented under Queue ID and Agent Name header rows.

**Note:** If you are creating a motion chart, you must include at least three profile variables.

To change the order of a segment or profile variable, drag its label to a different position.

To remove a profile variable or segment, point to the right edge of the item and then click the  button.



Visualization - 04/08/2016 18:11:17

Click to add title

Profile Variables: Call Count  Talk Count  Avg Talk Duration  

Column Segments: Interval Profile Variables

		Interval	03/01/2016 - 03/07/2016			
Queue ID	Agent Name	Call Count	Talk Count	Avg Talk Duration	Call Count	
Queue ID 1	Agent Name 1	7006	518	00:00	87	
	Agent Name 2	648	4385	00:00	7	
	Agent Name 3	9947	1919	00:00	36	
Queue ID 2	Agent Name 1	1183	4855	00:00	54	
	Agent Name 2	5357	5589	00:00	2	
	Agent Name 3	7852	9576	00:00	15	
Queue ID 3	Agent Name 1	4791	1947	00:00	90	
	Agent Name 2	174	4829	00:00	99	
	Agent Name 3	9842	2361	00:00	30	

To change the order of a profile variable or segment, drag its label to a different position.

To pivot across column and row segments, drag a segment label from the **Column Segments** box to the **Row/Series Segments** box, or vice versa.

To remove a profile variable or segment, point to the right edge of the item and click the  button that appears.

**Note:** You cannot remove a profile variable used in another profile variable.

14. To find out approximately how large the visualization will be when it is run, click the **More** button at the top of the visualization and select  **Info**. A popup window displays how many records in the database match the specified criteria and approximately how many rows and columns will be included in the output.

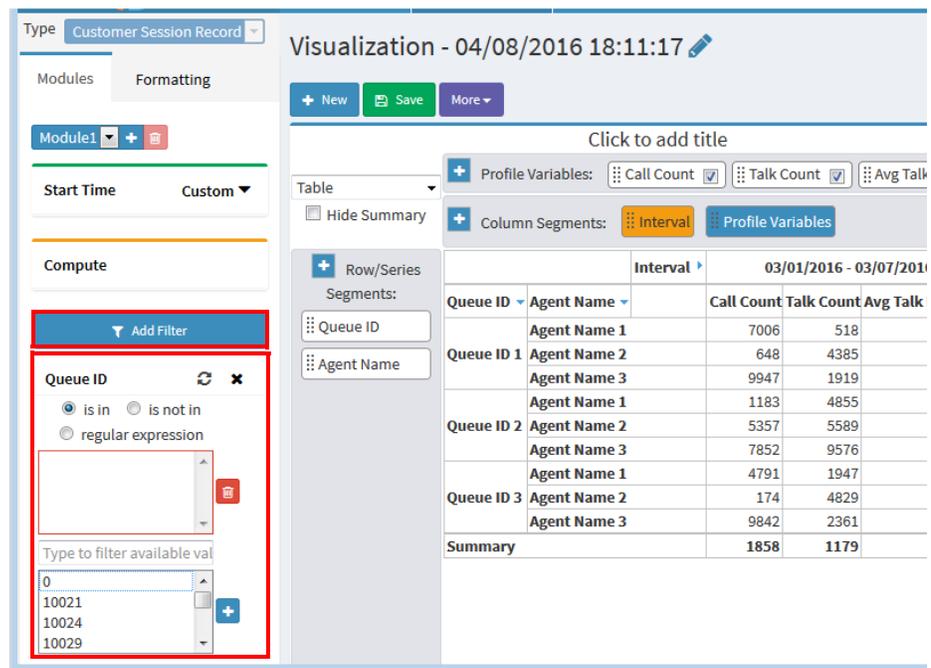
15. You can create a filter to limit the number of records the visualization considers by default. To create a filter:

- a. Click the **Add Filter** button in the **Modules** tab and in the dialog box that appears, select a field or measure from the displayed lists and click **Save**.

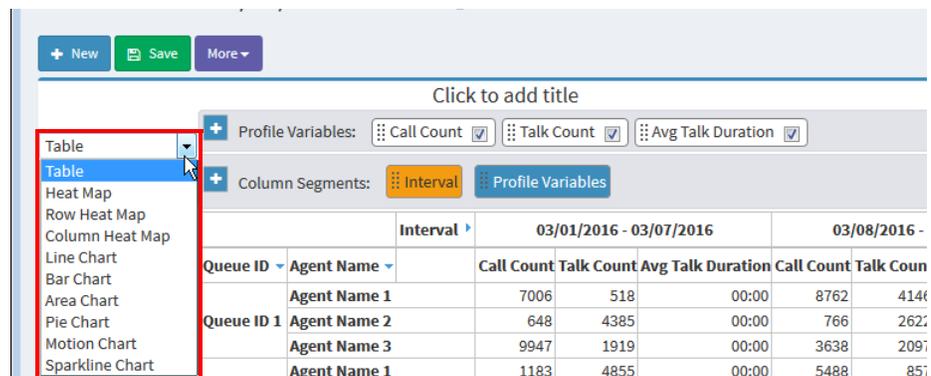
- OR -

Right-click a segment in the visualization and select **Create Filter**.

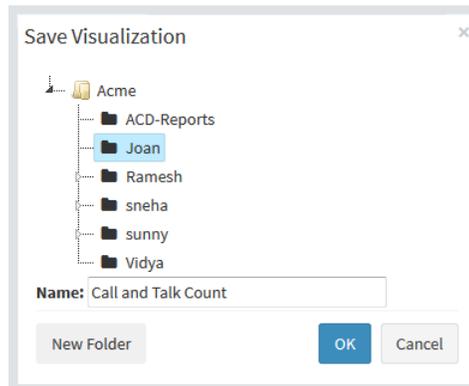
- b. When the new filter appears in the Modules tab, specify which values to include or exclude or, in the case of a measure, set a condition the data must satisfy. For more information, see “Defining Filters” on page 59.



16. Specify a visualization output format by selecting one of the options from the drop-down list shown in the next illustration. For a description of each format, see the table on page 32.



17. If you are creating a compound visualization, add at least one additional module before you save the visualization (see the next topic, “[Creating a Compound Visualization](#)”).
18. To save the visualization, click the **Save** button, and in the dialog box that appears:
  - a. Select the folder you want to save the visualization in.  
  
To create a new folder, click the **New Folder** button, and then enter a name for the folder in the text box that appears.
  - b. In the **Name** text box, enter a name for the visualization, and then click **OK**.



19. After saving the visualization, you can click the **Preview** button to view the visualization in a separate window.

## Creating a Compound Visualization

A compound visualization includes two or more modules that are displayed side by side. All modules within a visualization must have identical row/series segments, column segments, and profile variables, but can have differing date ranges, intervals, and filters.

When you create a visualization, you can make it a compound visualization by adding at least one additional module before you save the visualization. After a visualization is saved with only one module, the label on the *Modules* tab is changed to *Details* and the visualization cannot be edited to have an additional module.

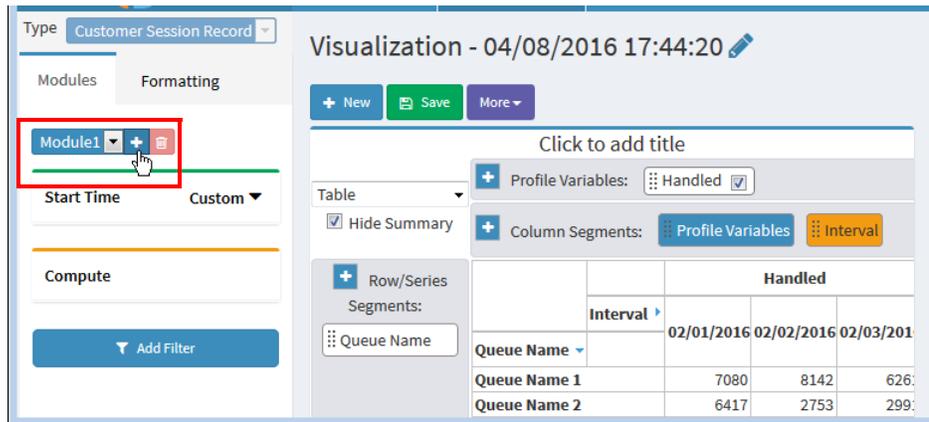
However, if you save a visualization with more than one module, you can later delete all but one module, save the visualization, and add more modules later.

Compound visualizations cannot be scheduled or exported and do not have pivoting capability in execution mode.

To add a module to a visualization:

- At any time during the creation of a visualization, click the **+** button at the top of the **Modules** tab and in the dialog box that appears, enter a name for the module and click **OK**.

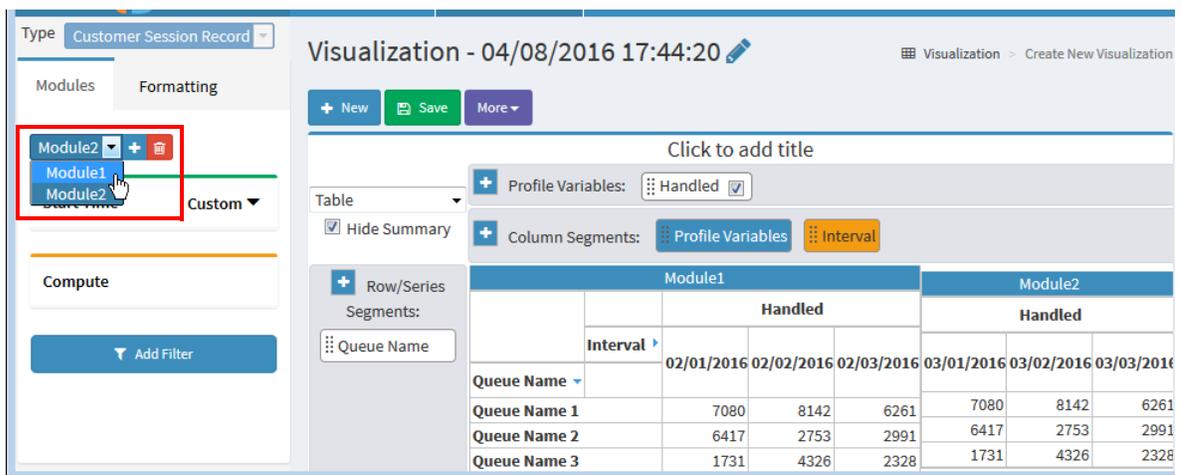
Click the button again for each additional module you want to add.



After adding a module, the middle of the visualization creation page displays the constituent visualizations side by side. You can select different date ranges, intervals, and filters for each module.

To display the settings that can be individualized for each module:

- Select a module from the drop-down list at the top of the **Modules** tab.



To change the label at the top of a module:

- Select the label text and type a new label.  
The drop-down list in the **Modules** tab reflects the label changes.

Queue Name
 February | | | March | | || Handled | | | | | |
|  | Interval | 02/01/2016 | 02/02/2016 | 02/03/2016 | 03/01/2016 | 03/02/2016 | 03/03/2016 |
Queue Name 1		7080	8142	6261	7080	8142	6261
Queue Name 2		6417	2753	2991	6417	2753	2991
Queue Name 3		1731	4326	2328	1731	4326	2328

 The interface also shows 'Profile Variables' set to 'Handled' and 'Column Segments' including 'Profile Variables' and 'Interval'."/>

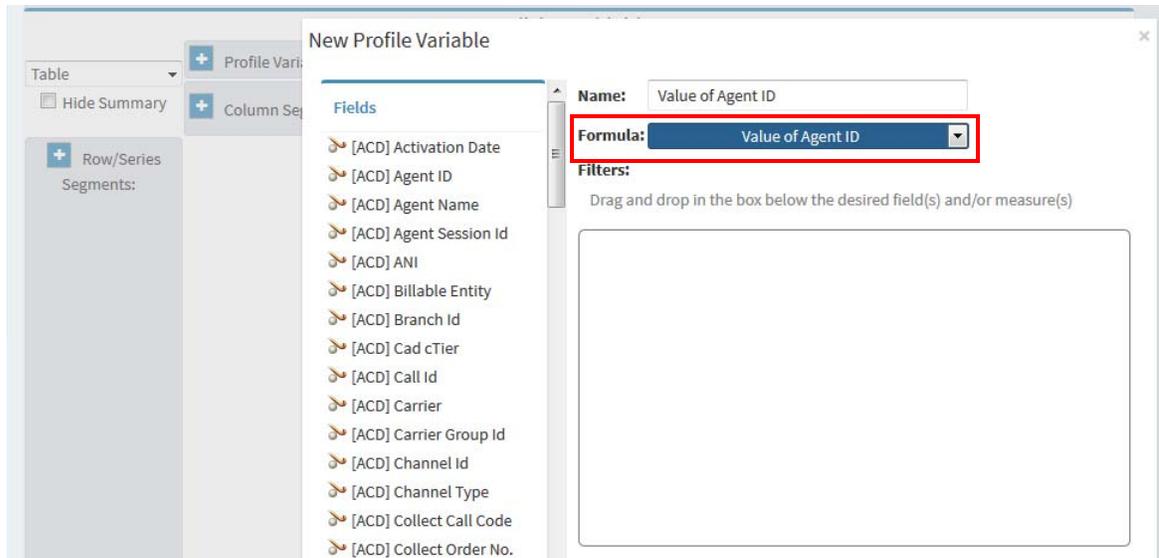
## Creating a Visualization Displaying Actual Values

To display the actual values in the database without aggregation, the visualization cannot include a time interval or segmentation, and all profile variables must be configured with *Value of* as the formula.

**Note:** The *Value of* option is not available in a visualization that already includes a time interval or segmentation.

To create a visualization displaying actual database values without aggregation:

1. On the Analyzer title bar, click **Visualization**, and on the **View** page that appears, click **Create New Visualization**.
2. Select an option from the **Type** drop-down list on the upper left side of the page to specify the visualization type: **Customer Session Record**, **Customer Activity Record**, **Agent Activity Record**, or **Agent Session Record**.
3. Specify the visualization time period (see step 3 beginning on page 41).
4. To add a profile variable:
  - a. Click the **Add +** button on the left side of the **Profile Variables** box, and select a field or measure in the **New Profile Variable** dialog box.
  - b. In the **Formula** drop-down, select the **Value of** setting.



- Repeat step 4 for each additional profile variable you want to add and then click **Save** to save the visualization. Then you can click **Preview**.

## Creating and Sharing an Enhanced Field

While creating or editing a visualization, users can create one or more enhanced fields to combine multiple values of a segmentation variable into one or more groups. When the visualization is run, the values of all the segmentation variables in a group are combined into one row and the profiling variables for that visualization are computed for those segmentation values. For example, you could create groups of entry points representing different products lines or geographical regions.

After you create an enhanced field, you can make it available in the New Segment dialog box for selection by yourself and other visualization designers.

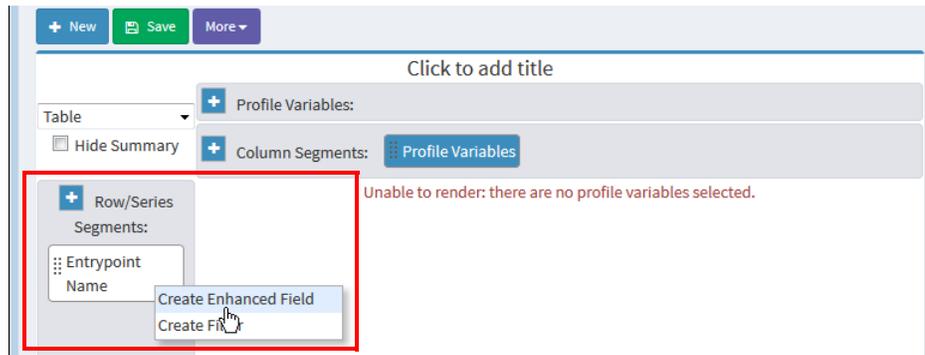
Topics covered in this section:

- [Creating an Enhanced Field](#)
- [Sharing an Enhanced Field](#)
- [Deleting a Shared Enhanced Field](#)

## Creating an Enhanced Field

To create an enhanced field:

1. While creating or editing a visualization, right-click a segment in the visualization and select **Create Enhanced Field**.

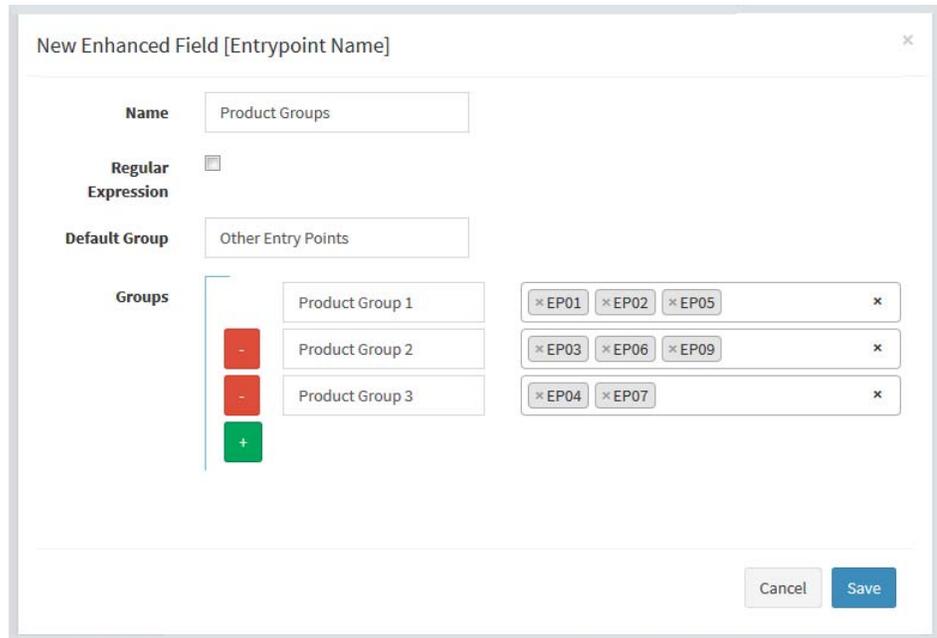


2. In the dialog box that appears, specify the settings for the group as described in the following table.

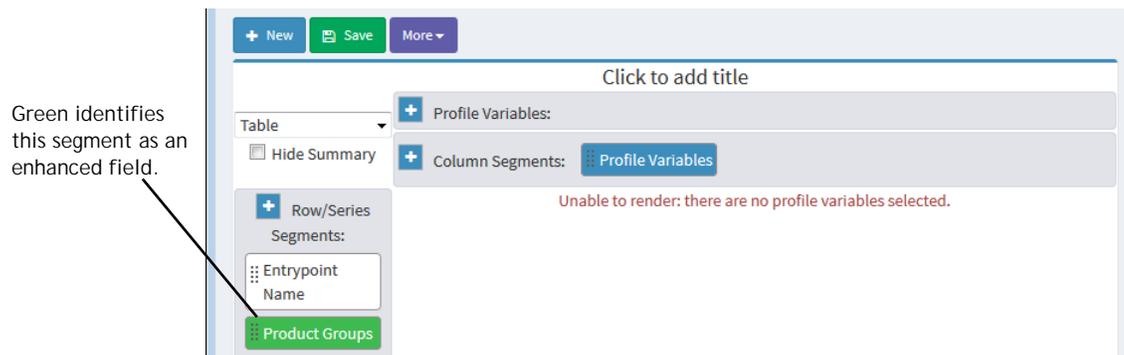
Setting	Description
Name	Enter a name for the enhanced field.
Regular Expression	Click this check box if you want matching to be based on a regular expression as opposed to a straight string match.
Default Group	Enter a name (for example, <i>Other Entry Points</i> ) for the group that will include all the variables not included in the defined groups.

Setting	Description
Groups	<p>To define a group, enter a name in the box on the left and then in the <b>Provide Values</b> box:</p> <ul style="list-style-type: none"> <li>• Select values from the drop-down list.</li> <li>- OR -</li> <li>• Type a value and then press Enter. Repeat for each value you want to include.</li> <li>- OR -</li> <li>• If the Regular Expression check box is selected, type a regular expression.</li> </ul> <p>To define another group, click the <b>Add</b>  button.</p>

In the following example, three product groups are created, each consisting of two or three entry points.



3. Click **Save**. The new segment is displayed in the visualization with a green background.



Green identifies this segment as an enhanced field.

## Sharing an Enhanced Field

To make an enhanced field available for future use:

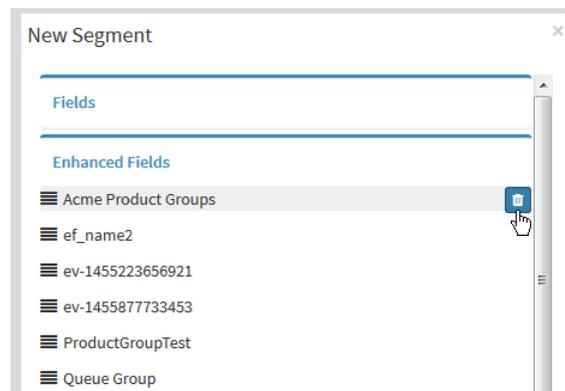
1. While creating or editing a visualization, right-click an enhanced field segment that has been added to the visualization and select **Save** from the context menu.
2. In the dialog box that appears, enter a name for the enhanced field in the **Name** text box or leave the existing name and click **OK**.

The saved enhanced field will now be listed in the New Segment dialog box for selection when you and other visualization designers create or edit a visualization.

## Deleting a Shared Enhanced Field

To delete a shared enhanced field:

1. While creating or editing a visualization, click the **Add**  button on the left side of the **Column Segments** or **Row/Series Segments** box to display the **New Segment** dialog box.
2. Rest your pointer over the name of the enhanced field you want to delete and click the  button that appears on the right.



If the enhanced field is not currently in use, it is deleted.

## Settings for a Sample-Based Visualization

When you create a sample-based visualization, you specify the total number of records to be considered as well as the following settings:

- **Frequency:** The number of records to be considered in each interval.
- **Band:** The number of records to be considered in each calculation.
- **Cumulative:** Whether or not the calculations are cumulative.

For example, suppose the total number of records to be considered is 600, the frequency is 100, and the band is 300. In this case:

- If *Cumulative* is not selected, the first calculation will be for records 1 to 300, the second for records 101 to 400, the third for records 201 to 500, the fourth for records 301 to 600.
- If *Cumulative* is selected, the first calculation will be for records 1 to 300, the second for records 1 to 400, the third for records 1 to 500, and the fourth for records 1 to 600.

## Selecting a Formula for a Measure

The following table describes the formulas available when you use a measure to create a profile variable.

Formula	Calculates
Average	The average value.
Sum	The total value.
Count	The number of values.  When you select this formula, the dialog box displays settings for specifying a condition for including records in the count as described in <a href="#">“Filtering Using a Measure” on page 60</a>
Minimum	The smallest value.
Maximum	The largest value.
Value of	The actual value in the database without aggregation (see <a href="#">“Creating a Visualization Displaying Actual Values” on page 53</a> ).
Geometric Mean of	The $n$ th root (where $n$ is the count of numeric values within the specified range) of the product of the values.
Kurtosis of	The measure of whether the data are peaked or flat relative to a normal distribution.
Median	The middle value.

Formula	Calculates
Population Variance of	Variance of the set of unique values.
Skewness of	How far the median is from the mean.
Standard Deviation of	The square root of the variance.
Sum of Squares for	The sum of the squares of the values.
Variance of	The average of the squared differences between each value and the mean value.

## Defining Filters

Topics covered in this section:

- [Filtering Using a Field](#)
- [Filtering Using a Measure](#)

### Filtering Using a Field

When you run a visualization, the settings panel displays controls for specifying which records to include or exclude from the visualization.

These controls are also displayed when you do the following while creating or editing a visualization:

- Drag a field into the Filters area of the dialog box that appears when you create or edit a profile variable.
- Click the **Add Filter** button and select a listed field in the dialog box that appears.
- Right-click a segment in the visualization and select **Create Filter**.

To specify which field values to include or exclude, do one of the following:

- Select the **regular expression** button, and then enter a regular expression in the text box that appears to specify which values to include or exclude.

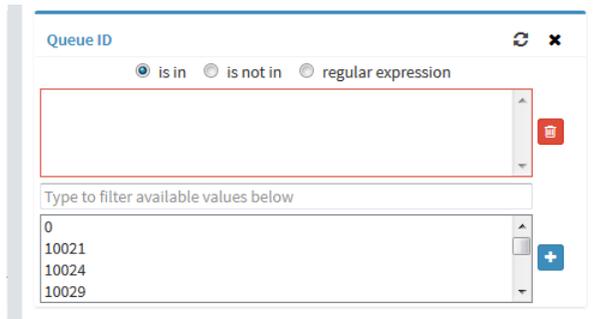
- OR -

- Select the **is in** or **is not in** button, then select the values in the list that you want to include or exclude and click the **Add +** button. Or you can type a name of a value in the text box and then click the **Add +** button.

To filter the list of available values, type one or more characters in the text box. As you type, the values that match your text appear in the list for your selection. You can use \* as a wildcard to represent one or more characters.

To specify an empty (blank) value, click the **+**  button with nothing selected.

To remove a specified value, select it and click the  button.



## Filtering Using a Measure

The Analyzer displays controls for specifying which records to include in or exclude from the visualization based on the value of a measure when you do the following:

- Drag a field into the Filters area of the dialog box that appears when you create or edit a profile variable.
- Click the **Add Filter** button in the **Modules** panel (or, if you are editing a single-module visualization, the **Details** panel) and select a listed measure in the dialog box that appears.

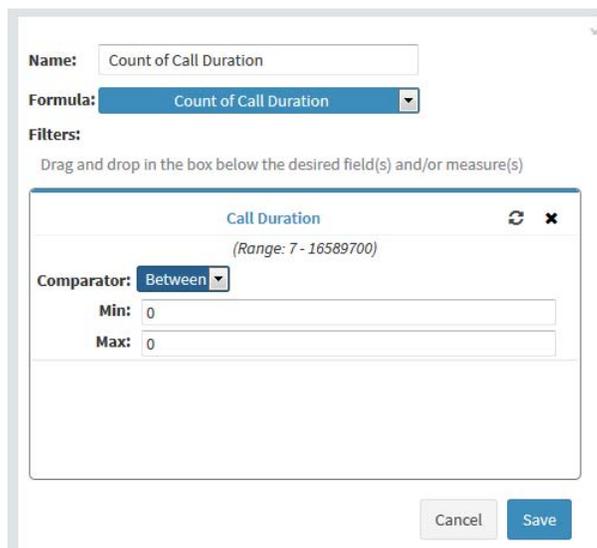
To set a condition for a measure, do one of the following:

- To restrict the data to values between a minimum and maximum value, select **Between** from the **Comparator** drop-down list, and then enter a minimum and maximum value in the **Min** and **Max** text boxes.

---

**Note:** The minimum value is inclusive, but the maximum value is non-inclusive.

---



- ▶ To restrict the data based on a single-sided comparison, select an operator from the **Comparator** drop-down list and enter a value in the **Value** text box.

- < less than
- <= less than or equal to
- = equal to
- != not equal to
- >= greater than or equal to
- > greater than

In the following example, a condition (greater than 0) is applied to a *Total Revenue* measure to create a *Converted* profile variable.

The screenshot shows a dialog box for creating a profile variable. The 'Name' field is 'Converted'. The 'Formula' dropdown is 'Count of Estimated Revenue'. The 'Filters' section shows a filter for 'Estimated Revenue' with a range of '-3913.27 - 2024.0'. The 'Comparator' dropdown is set to '>' and the 'Value' text box contains '0'. 'Cancel' and 'Save' buttons are at the bottom.

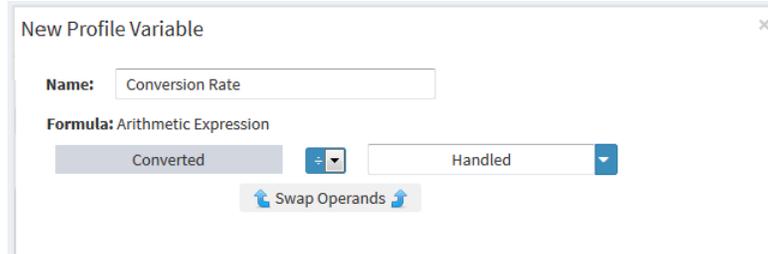
## Creating a Profile Variable Based on a Another Profile Variable

You can create a new profile variable by applying a mathematical formula to an existing profile variable. For example, consider a visualization that includes both a *Handled* and *Converted* profile variable. You could calculate the conversion rate for each record by creating a profile variable that divides the *Converted* value by the *Handled* value.

To create a profile variable based on an existing profile variable:

1. Right-click a profile variable in the visualization and select **New Profile Variable** from the context menu.
2. In the New Profile Variable dialog box that appears, enter a name for the profile variable in the **Name** text box.
3. Select a mathematical symbol: +, −, × or ÷.

4. Do one of the following in the text box to the right of the mathematical symbol:
  - Type a numeric value.
  - Select the name of an existing profile variable from the drop-down list.



5. Click **Save**. The new profile variable appears in the visualization.

## Creating and Using Shared Formulas

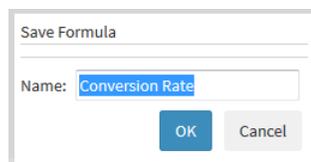
After you create a profile variable, you can make its formula available in the Formulas panel for use by yourself and other visualization designers as described in the following topics:

- [Creating a Shared Formula](#)
- [Editing a Shared Formula](#)
- [Deleting a Shared Formula](#)

## Creating a Shared Formula

To create a shared formula:

1. On the visualization creation page, create a profile variable as described in step 10 on [page 45](#) or open an existing visualization for editing.
2. Right-click the profile variable and select **Save** from the context menu.
3. In the dialog box that appears, type a name for the formula in the **Name** text box or leave the existing name and click **OK**.



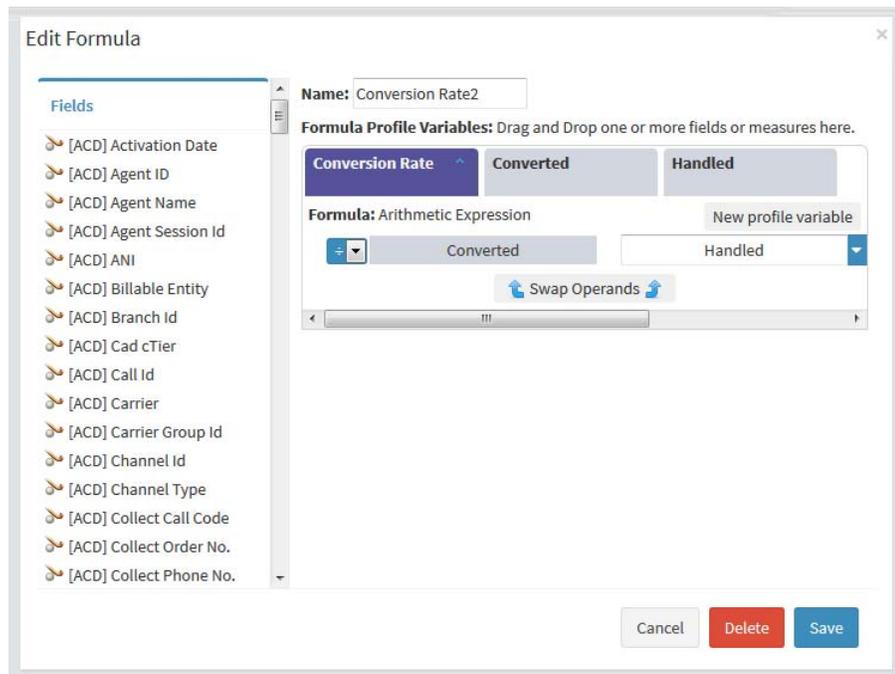
The formula is saved in the Formulas panel.

## Editing a Shared Formula

To edit a shared formula:

1. While creating or editing a visualization, click the **Add +** button on the left side of the **Profile Variables** box, and then double-click the name of a formula listed in the **Formulas** panel.

The **Edit Formula** dialog box appears, displaying a tab for each profile variable in the formula. The color purple identifies the resultant profile variable. A formula can have only one resultant profile variable.



2. Click a tab to see the profile variable definition in the formula. You can make the same modifications in the Edit Formula dialog box as you can when you create or edit a profile variable in the visualization.
3. You can create a new formula based on a selected tab by clicking the **New profile variable** button.

## Deleting a Shared Formula

To delete a shared formula:

1. While creating or editing a visualization, click the **Add +** button on the left side of the **Profile Variables** box, and then double-click the name of a formula listed in the **Formulas** panel.
2. In the **Edit Formula** dialog box, click the **Delete** button. Then in the confirmation dialog box, click **YES**.

If the formula is not currently in use, it is deleted.

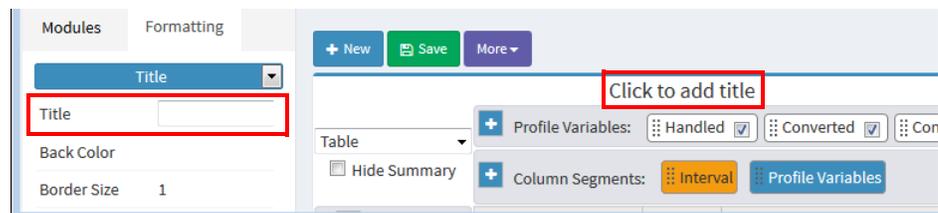
## Creating and Formatting a Visualization Title

To create and format a visualization title while creating or editing a visualization:

1. To add a visualization title, click the text **Click to add title** in the visualization canvas and enter a new title. To edit the title, select it and enter a new title.

- OR -

In the **Formatting** tab, select **Title** from drop-down and then click to the right of the **Title** field to display a text box where you can enter the title text.



2. To customize the format of the title, select **Title** from the drop-down list in the **Formatting** tab to display the formatting options that you can customize, such as border size, style, and color; text alignment and color; margins; padding; and font size, family, style and weight.

Visualization - 04/08/2016 16:53:49

Click to add title

Profile Variables:  Handled  Avg Talk Duration

Column Segments:  Interval  Profile Variables

		Interval	03/01/2016 - 03/07/2016	03/08/2016 - 03/14/2016
Queue ID	Agent ID	Handled	Avg Talk Duration	Handled Avg Talk
	Agent ID 1	9638	59.00	3648
Queue ID 1	Agent ID 2	1830	18.00	9552
	Agent ID 3	1702	87.00	3045
	Agent ID 1	5475	76.00	6022
Queue ID 2	Agent ID 2	243	88.00	2469
	Agent ID 3	3420	59.00	5104
Queue ID 3	Agent ID 2	9769	99.00	2056
	Agent ID 3	7966	54.00	61
<b>Summary</b>		<b>4434</b>	<b>50.00</b>	<b>9623</b>

(Note: values shown are simulated and do not reflect actual data.)

## Formatting a Table

To customize the format of a table:

1. While creating or editing a table visualization, select the **Formatting** tab, and then select **Table** from the drop-down list to display the available formatting options.

Visualization - 04/08/2016 16:53:49

Click to add title

Profile Variables:  Handled  Avg Talk Duration

Column Segments:  Interval  Profile Variables

		Interval	03/01/2016 - 03/07/2016	03/08/2016 - 03/14/2016
Queue ID	Agent ID	Handled	Avg Talk Duration	Handled Avg Talk
	Agent ID 1	9638	59.00	3648
Queue ID 1	Agent ID 2	1830	18.00	9552
	Agent ID 3	1702	87.00	3045
	Agent ID 1	5475	76.00	6022
Queue ID 2	Agent ID 2	243	88.00	2469
	Agent ID 3	3420	59.00	5104
Queue ID 3	Agent ID 2	9769	99.00	2056
	Agent ID 3	7966	54.00	61
<b>Summary</b>		<b>4434</b>	<b>50.00</b>	<b>9623</b>

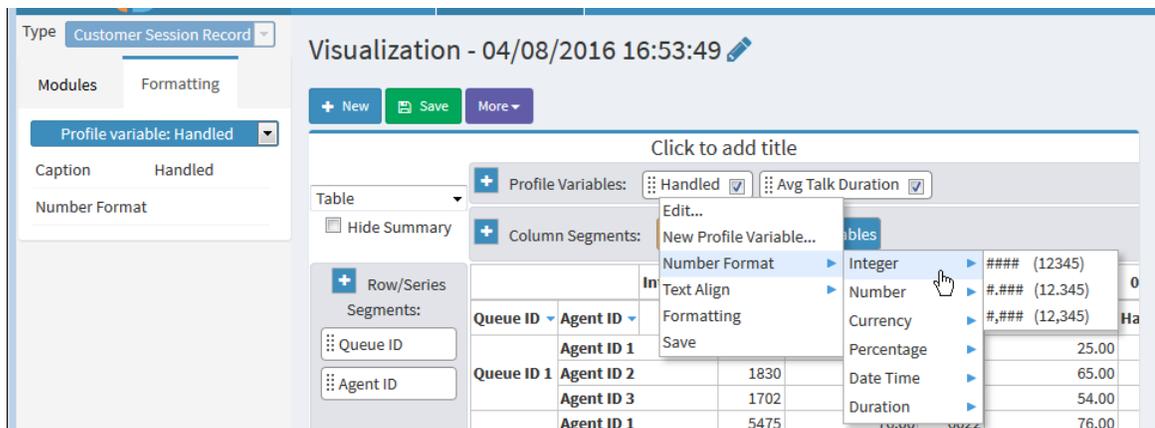
2. Change any of the following options to customize the table format.

Option	Description
Back Color	Select the background color from the color selector or enter the HTML (hexadecimal) code for a color.
Border Size	Enter a value in pixels to change the border width.
Border Style	Select a value from the drop-down list to specify the style of the border around the table or select <b>None</b> if you do not want a border around the table.
Border Color	Select the border color from the color selector or enter the HTML code for a color.

## Formatting a Profile Variable

To change a profile variable’s text alignment, number format, or caption:

- Do one of the following:
  - Right-click a profile variable to display the context menu.
  - Select a profile variable from the drop-down list in the **Formatting** tab to display the number format and caption options in the tab.
- Change any of the options described in the following table.



Option	Description
Caption	To change the caption, click the caption text displayed in the Formatting tab to select it and then enter a different caption.  This setting is available only in the Formatting tab.

Option	Description
Number Format	Specify whether you want the data to be formatted as <b>Integer</b> , <b>Number</b> , <b>Currency</b> , <b>Percentage</b> , <b>Date Time</b> , or <b>Duration</b> , and within that category, specify how you want the data displayed.  For example, when you select Percentage, you can select one of the following format options: <ul style="list-style-type: none"> <li>• ##.##% (12.34%)</li> <li>• ##% (12%)</li> </ul>
Text Align	To change the alignment of the column text, select a value from the drop-down list: <b>Left</b> , <b>Center</b> , or <b>Right</b> .  This setting is available only from the context menu.

## Formatting a Chart

To customize the format of a chart:

1. While creating or editing a chart, select the **Formatting** tab and select **Chart** from the drop-down list to display the available formatting options.



2. Change any of the following options to customize the chart format.

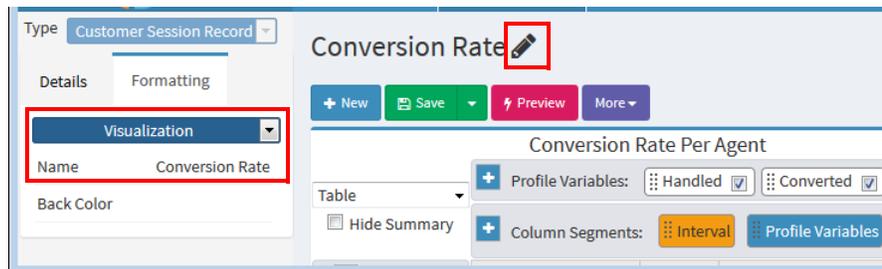
Option	Description
Back Color	Select the background color from the color selector or enter the HTML code for a color.
Border Size	Enter a value in pixels to change the width of the border around the chart.
Border Style	Select a value from the drop-down list to specify the style of the border around the chart or select <b>None</b> if you do not want a border.

Option	Description
Border Color	Select the border color from the color selector or enter the HTML code for a color.
Gradient Fill	To add a shade pattern to the lines, areas, or bars in a line, area, or bar chart, select the direction of the color gradient from the drop-down list.
Stacking	To display data values stacked on top of each other in a line, area, or bar chart, select <b>Normal</b> to stack by the data values or <b>Percent</b> to stack by percentages.
Axis Labels	Select a value from the drop-down list to specify whether to show or hide axis labels.
Invert Axes	Select either <b>True</b> or <b>False</b> from the drop-down list to specify whether or not to invert the axes.
Data Labels	Select a value from the drop-down list to specify whether to show or hide data labels.
Data Labels Rotation	Select a value from the drop-down list to specify the data label rotation angle: None, 45°, 90°, or -90°.

## Editing the Visualization Name

To edit the visualization name:

1. If the visualization is not already open for editing, click **Visualization** on the Analyzer title bar and on the **View** page, click the  button to the left of the listed visualization you want to edit and select **Edit** from the context menu.
2. Do one of the following:
  - Click the **Edit Visualization Name**  button at the top of the visualization canvas to select the existing text; then type a new name.
  - Click the **Formatting** tab, select **Visualization** from the drop-down list, and then click the value in the **Name** text box and type a new name.



# 5

## Designing Dashboards

A dashboard is an interface that can display multiple visualizations on a single page. To create a dashboard:

1. On the Analyzer menu bar, click **Dashboard** and on the **View** page that appears, click **Create New Dashboard**.
2. Drag a visualization from the **Visualizations** tab on the left side of the page to the canvas area on the right. Continue adding as many visualizations as you want the dashboard to display.

Click this text to add a dashboard title.

Click this button to edit the dashboard name

Right-click a visualization to display these options.

Drag visualizations from this tab to the dashboard canvas.

Queue Name	Interval	Abandoned
	05/01/2015	444
Queue Name 1	05/02/2015	5120
	05/03/2015	3231
Queue Name 2	05/01/2015	7001
	05/02/2015	1184
	05/03/2015	233
Queue Name 3	05/01/2015	8762
	05/02/2015	1639
	05/03/2015	6805
Summary		615

Call Count by Entry Point

3. To reposition a visualization, simply drag it to new position, or do one of the following:
  - In the **Formatting** tab on the left side of the page, select the visualization name from the drop-down list to display the configurable settings, and adjust the **Horizontal** and **Vertical** settings.
  - Right-click the visualization to display a list of alignment options in the context menu.
4. To resize a visualization, do one of the following:
  - Point to an edge or corner and when the resize arrow appears, drag the edge or corner to decrease or increase the visualization's size.
  - In the **Formatting** tab, select the visualization name from the drop-down list and edit the **Width** and **Height** settings.
5. To remove a visualization from the dashboard, do one of the following:
  - Point to the visualization and then click the **Delete**  button that appears in the upper right corner of the visualization.
  - Right-click the visualization and select **Delete** from the context menu.
  - While holding down the Ctrl key on your keyboard, click one or more visualizations to select them, and then press the DELETE key.
6. To add a dashboard title, click the text **Click to add title** in the dashboard canvas and enter a title. To edit the title, select it and enter a new title.
7. To customize the format of the visualization title, select the title from the drop-down list in the **Formatting** tab to display format options that you can customize, such as border style, text alignment, and font size, color, and weight.
8. To save the dashboard, click the **Save** button, and in the dialog box that appears:
  - a. Select the folder you want to save the dashboard in.

To create a new folder, click the **New Folder** button, and then enter a name for the folder in the text box that appears.
  - b. In the **Name** field, enter a name for the dashboard, and then click **OK**.
9. After saving the dashboard, you can click the **Preview** button to view the dashboard in a separate window.
10. To edit the dashboard name, click the **Edit Dashboard Name**  button at the top of the dashboard canvas to select the existing text; then enter a new name and click the **Apply**  button.



## Sample Visualizations

ACD reports typically show metrics such as call volume, abandon counts, and ASA to illustrate operational aspects of a call center.

Analytics yields deeper insights beyond the operational aspects of the call center. Analytics yields answers to questions such as:

- Which queues have more abandons?
- What is the variation in agent performance?

Cisco CJP Customer Engagement Analyzer makes answering these questions a simple matter of *segmentation* and *profiling*.

**Segmentation** is classifying calls into pertinent groups such as:

- By queue
- By agent

**Profiling** involves measuring an attribute of interest such as:

- Number of abandons
- Average talk time for calls connected to agents

The following sample visualizations illustrate how to answer these questions:

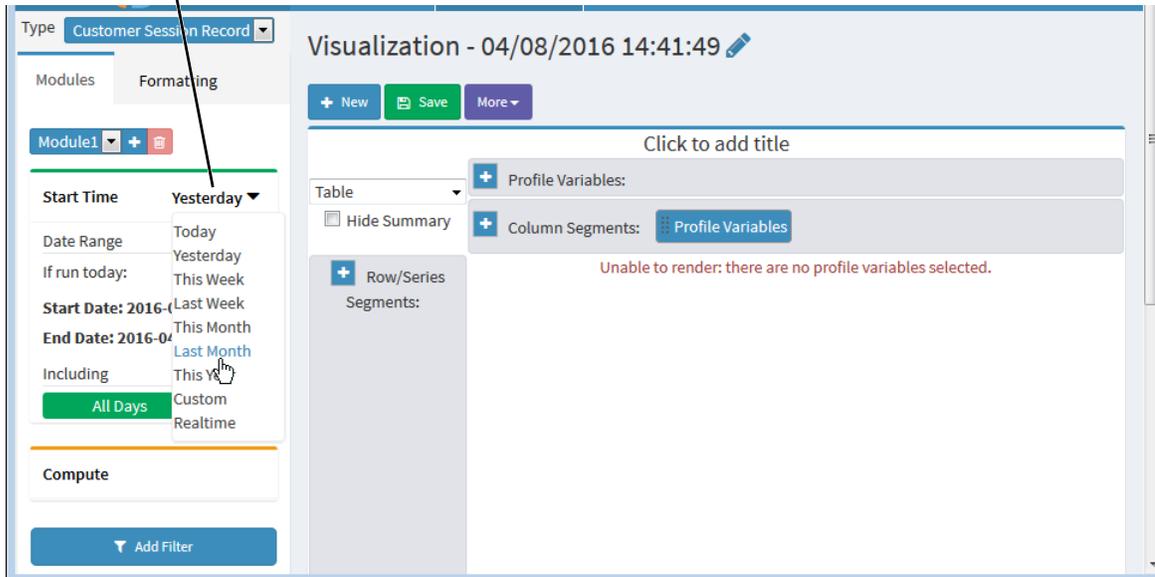
- [Sample 1: Which Queues Have More Abandons?](#)
- [Sample 2: What Is the Variation in Agent Performance?](#)

## Sample 1: Which Queues Have More Abandons?

Answering this question involves the following steps:

1. On the visualization creation page, select the date range of interest from the **Modules** tab on the left—for example *Last Month*.

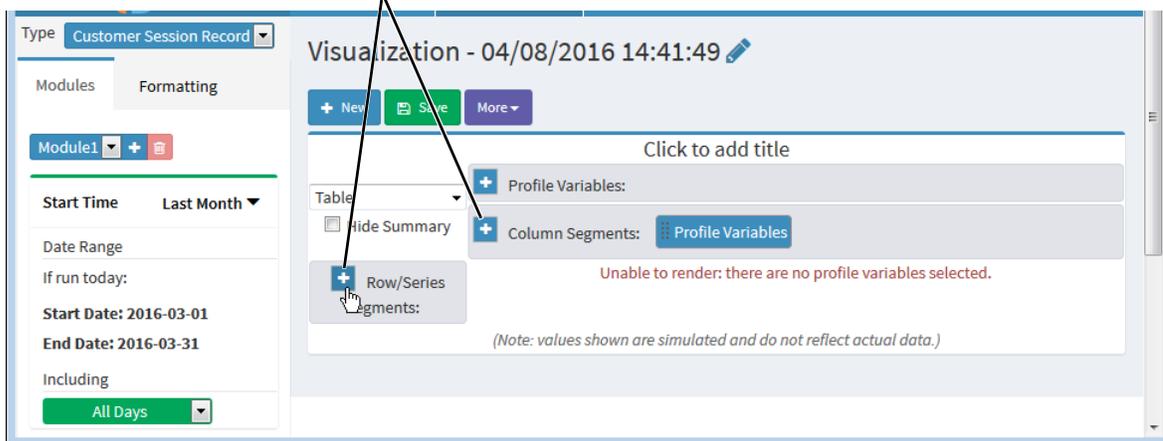
Click here to display a list of date range options.



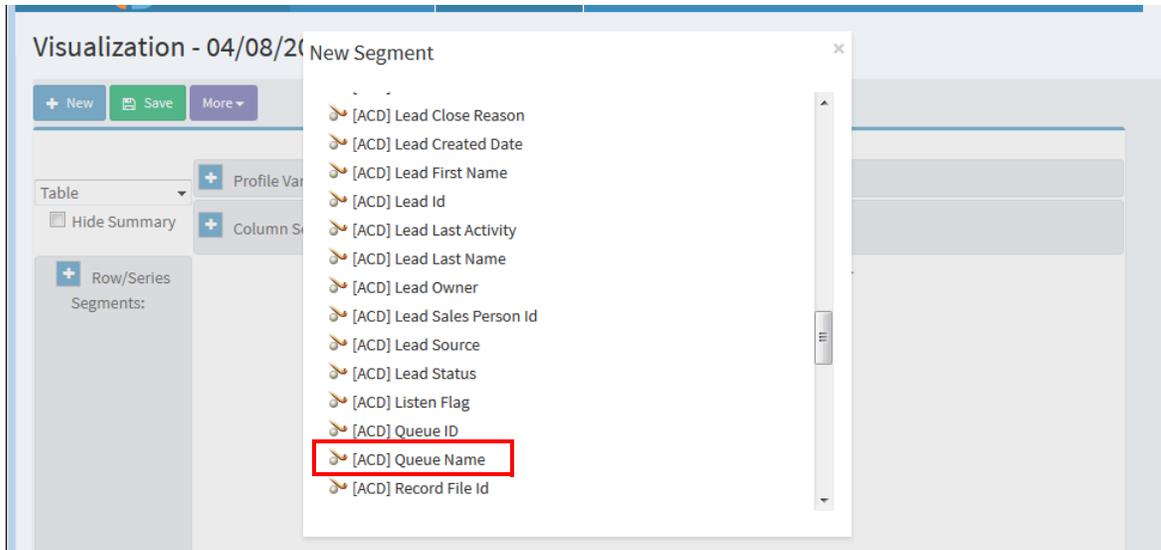
2. To specify the segmentation:

- a. Click the **Add +** button on the left side of the **Row/Series Segments** or **Column Segments** box.

Click one of these buttons.

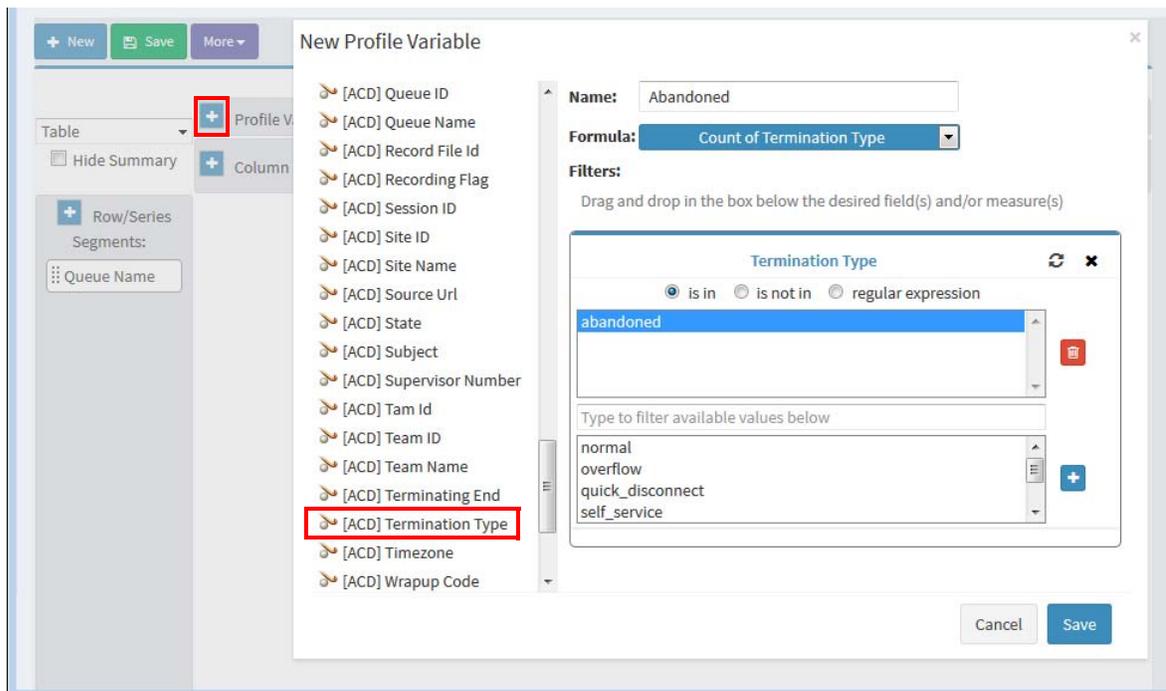


- b. In the **New Segment** dialog box that appears, scroll down the **Fields** list and select **Queue Name**.



3. To specify the profile variable:

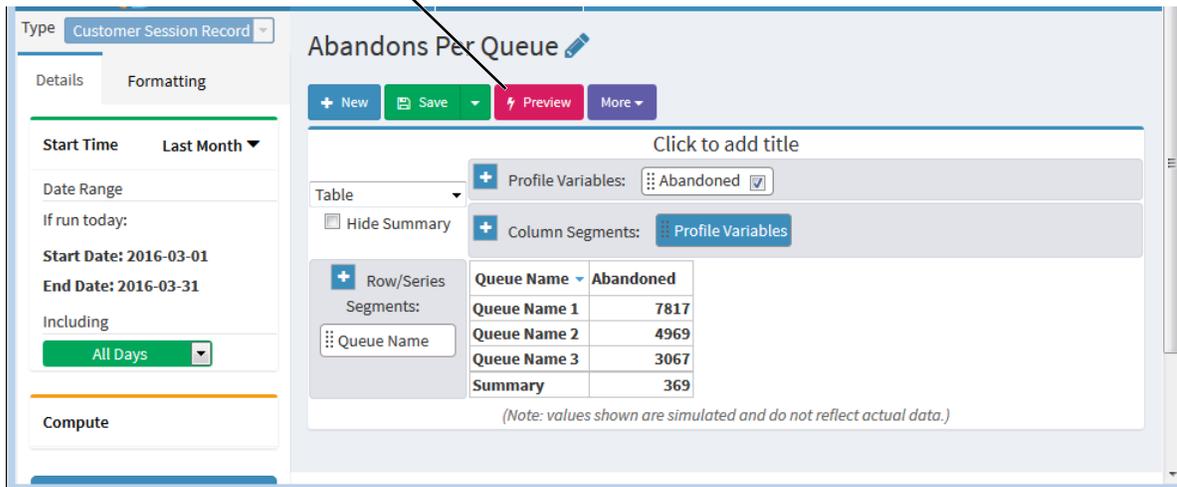
- a. Click the **Add**  button on the left side of the **Profile Variables** box, and in the **New Profile Variable** dialog box, select **Termination Type** from the **Fields** list.
- b. To specify the termination type of interest, drag **Termination Type** from the **Fields** list to the **Filters** section of the dialog box, select *abandoned* from the displayed list of values, and click the **Add**  button. Then type a name for the profile variable (for example *Abandoned*) in the **Name** box and click **Save**.



4. Click **Save** at the top of the visualization canvas, and in the dialog box that appears, enter a name and click **OK**. Then you can click **Preview**.

In a few simple steps you have a visualization that shows which queues had higher total abandons last month.

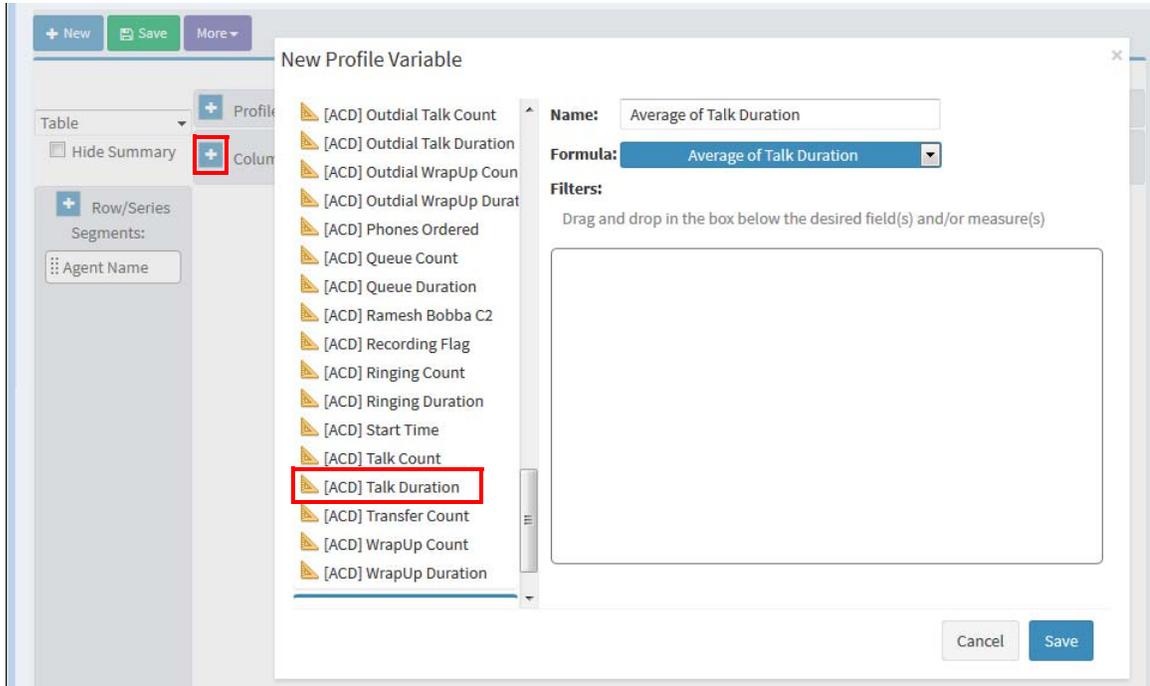
The **Preview** button appears after you save the visualization.



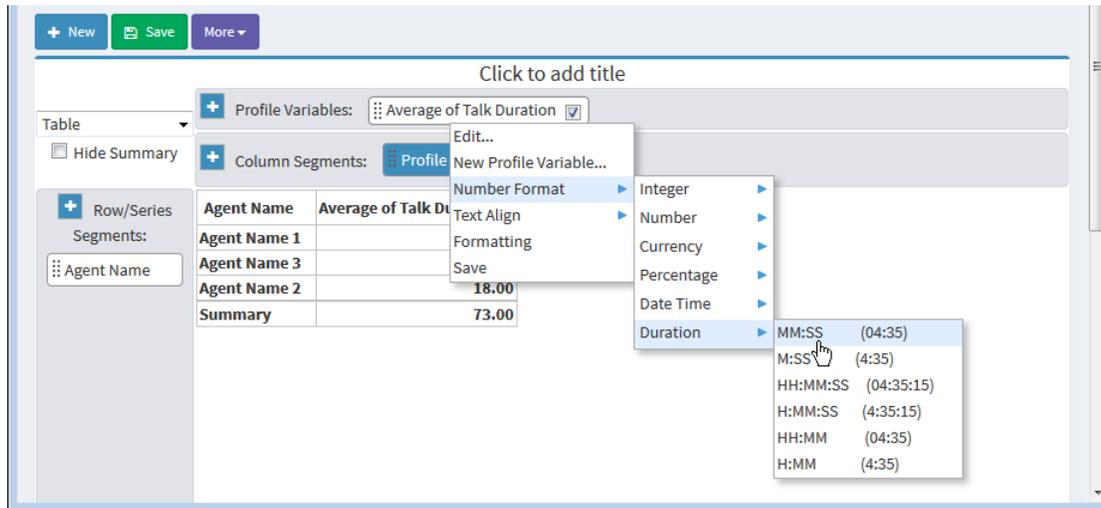
## Sample 2: What Is the Variation in Agent Performance?

Assuming the agent performance metric of interest is average talk time, answering this question involves the following steps:

1. On the visualization creation page, select the date range of interest from the **Modules** tab on the left—for example *Last Week*.
2. To specify the segmentation, click the **Add +** button on the left side of a Segment box and in the **New Segment** dialog box that appears, select **Agent Name** from the **Fields** list.
3. Click the **Add +** button on the left side of the **Profile Variables** box, and in the **New Profile Variable** dialog box:
  - a. Select **Talk Duration** from the **Measures** list.
  - b. Leave **Average** as the selected formula and click **Save**.



- Optionally, you can right-click the profile variable to select a number format from the context menu, such as *MM:SS*.



- Click **Save** at the top of the visualization canvas, and in the dialog box that appears, enter a name and click **OK**. Then click **Preview**.

In a few simple steps you have a visualization that shows the average talk time for all your agents.





# Mappings of ACD Metrics to Analyzer Parameters

This appendix provides mappings between ACD report parameters that are available in CJP Management Portal Reporting modules and the corresponding Analyzer parameters. The information presented here assumes that a data feed from the CJP ACD application to the Analyzer repository has been established. Contact your CJP account team member if this feed has not been set up.

Some ACD report parameters map directly to Analyzer variables while others require computation steps. The following topics include details on how specific ACD report parameters can be re-created in Analyzer.

Topics covered in this appendix:

- [Historical Call Report Mappings](#)
- [Historical Agent Report Mappings](#)
- [Real-Time Call Report Mappings](#)
- [Real-Time Agent Report Mappings](#)
- [Historical Multimedia Report Mappings](#)

## Historical Call Report Mappings

The following table provides mappings between ACD historical call report parameters available from the CJP Management Portal and historical call report parameters available in Analyzer visualizations.

Portal Parameter	Description	Analyzer Parameter	Comments
Queue	The name of a queue.	Queue Name	
Site	The name of a site (appears only in site-level and team-level reports).	Site Name	
Team	The name of a team (appears only in team-level reports).	Team Name	

Portal Parameter	Description	Analyzer Parameter	Comments
Date	The date (appears only in historical reports).	Date	Interval
Service Level %	The number of calls that were answered within the Service Level threshold provisioned for the queue or skill (in a skills interval by queue report), divided by total calls (including abandoned calls) multiplied by 100:	Data Type: CSR $\frac{((\text{In Service Level}) / (\text{Answered} + \text{Abandoned}))}{* 100}$	
Adjusted Service Level %	The number of calls that were either answered or abandoned within the Service Level threshold provisioned for the queue or skill (in a skills interval by queue report), divided by total calls (including abandoned calls) multiplied by 100.	Data Type: CSR $\frac{((\text{In Service Level} + \text{Abandoned within SL}) / (\text{Answered} + \text{Abandoned}))}{* 100}$	
In Service Level	The number of calls that were answered within the Service Level threshold provisioned for this queue or skill (in a skills interval by queue report). Does not appear in site-level or team-level real-time reports.	Data Type: CSR Count of Session ID with Filter Queue Duration <= <Service level threshold value>	
% Answered	The number of answered calls divided by the number of calls that entered the queue minus short calls multiplied by 100.	Data Type: CSR $(\text{Answered} / (\text{Answered} + \text{Abandoned})) * 100$	
% Abandoned	The percentage of calls that were abandoned during the report interval. $(\text{Abandoned} / \text{Total}) * 100$	Data Type: CSR Abandoned / Total	
Maximum Wait Time	The longest amount of time a call was in the queue waiting to be answered (appears only in historical reports).	Data Type: CSR Maximum Queue Duration	
Total	The total number of calls from all origination types.		Total = New + From Entry Point + Transferred In -- New is available in CSR report. From Entry Point and Transferred-in is in CAR report.
From Entry Point	The number of calls that entered this queue after being classified into the queue from an entry point by the IVR call control script.	Data Type: CAR Count Of Session ID, Previous State = IVR, Current State = Connected and Parked	

Portal Parameter	Description	Analyzer Parameter	Comments
Transferred In	The number of calls that entered this queue after having been transferred into the queue by an agent who clicked the Queue button, selected a queue from the drop-down list, and clicked Transfer.		Not Available
Completed	The number of calls that ended during the report interval. Answered, abandoned, and disconnected calls are included in this count. Transferred and short calls are not.	Data Type: CSR Completed = Answered + Abandoned + Disconnected	
Abandoned	The number of calls that were abandoned during the report interval. An abandoned call is a call that was terminated without being distributed to a destination site, but that was in the system for longer than the time specified by the Short Call threshold provisioned for the enterprise.	Data Type: CSR Count of Session ID with Filter Termination type = Abandoned	
Abandoned within SL	The number of calls that were terminated while in queue within the Service Level threshold provisioned for the queue or skill (in a skills interval by queue report).	Data Type: CSR Count of Session ID with Filter Termination Type = 'abandoned' and 'short' and Filter Queue Time<= <Service level threshold value>	
Disconnected	The number of calls that were answered (that is, connected to an agent or distributed to and accepted by a destination site), but that were then immediately disconnected within the Sudden Disconnect threshold provisioned for the enterprise.	Data Type: CSR Count of Session ID with Filter Termination Type = 'Quick_disconnect'	
Overflow	The number of calls that were sent to the overflow number provisioned for the queue and were answered. Typically, a call is sent to an overflow number if it has been queued for longer than the maximum time specified in the routing strategy or because an error occurred when the call was sent to an agent. If the call is not answered, it is included in the Abandoned or Disconnected count when it ends.	Data Type: CSR Count of Session ID with Filter Termination Type = 'Overflow'	

Portal Parameter	Description	Analyzer Parameter	Comments
Transferred	The sum of all calls transferred from this queue to an agent, external DN, or another CJP queue:  Transferred Out + Requeued		Transferred Out available in CSR and Requeued computed in CAR
Transferred Out	The number of calls that left this queue after having been transferred by an agent to an external DN or to another agent. Transferred out calls result when an agent clicks the <b>Agent</b> button, selects an agent from the drop-down list, and clicks <b>Transfer</b> , or when the agent clicks the <b>DN</b> button, enters a phone number, and clicks <b>Transfer</b> . Transferred out calls may begin as a consultation or conference, but will be counted as transferred out only when the first agent completes the transfer to the second party.	Data Type: CSR Sum of Transfer Count	
Blind Transfers	The subset of transferred out calls that were transferred by the agent to another agent or an external DN without the first agent consulting or conferencing with the party to whom the call was transferred.		Not Available
Requeued	The number of calls that left this queue after having been transferred by the agent to another queue. For calls to be requeued, the first agent clicks the <b>Queue</b> button, selects a queue from the drop-down list, and clicks <b>Transfer</b> .	Data Type: CAR Count Of Session ID, Previous State = Talking, Current State = Parked	
Queued	The number of calls that entered the queue during this interval.	Data Type: CAR Count Of Session ID, Current State = Parked	
Answered	The number of calls that were routed from the queue to an agent or available resource and were answered by the agent or resource.	Data Type: CSR Count of Session ID with Filter Termination type = normal	
Secondary Answered	The number of calls that were answered by an agent after being transferred to the agent by another agent.		Not Available
Short	The number of calls that were terminated within the Short Call threshold provisioned for the enterprise without being connected to an agent.	Data Type: CSR Count of Session ID with Filter Termination type = short_call	

Portal Parameter	Description	Analyzer Parameter	Comments
Consult Count	The number of times agents initiated a consult with another agent or someone at an external number while handling a call.	Data Type: CSR Sum of no of consults	
Conference Count	The number of times agents initiated a conference call to an agent or external number.	Data Type: CSR Sum of Conference Count	
Hold Count	The number of times a caller was put on hold.	Data Type: CSR Sum of Hold Count	
CTQ Request Count	The number of times consult-to-queue requests were initiated.	Data Type: CSR Sum of CTQ Count	Not Available
Inbound CTQ Answer Count			Not Available
CTQ Request Time	The cumulative amount of time between when consult-to-queue requests were initiated and when the consultations ended (appears only in historical reports).	Sum of CTQ Duration	Not Available
CTQ Answer Time	The cumulative amount of time between when consult-to-queue requests were answered and when the consultations ended (appears only in historical reports).		Not Available
Queued Time	The cumulative amount of time calls were in queue, waiting to be sent to an agent or other resource. Because queued time is calculated after the call leaves the queue, the queued time for a call that is still in the queue is not reflected in the report.	Data Type: CSR Sum of Queued Duration	
Answered Time	The cumulative amount of time between when calls entered the queue and when they were answered (connected to an agent or other resource) during the report interval. Because answered time is calculated after the call is answered, answered time for calls that are waiting to be answered is not reflected in the report.	Data Type: CSR Sum of Queue duration where Handled = 1	
Abandoned Time	The cumulative amount of time calls were in the system for longer than the time specified by the Short Call threshold, but terminated before being distributed to an agent or other resource.	Data Type: CSR Sum of Queue duration where Handled = 0	

Portal Parameter	Description	Analyzer Parameter	Comments
Connected Time	The time interval between when calls were answered by an agent or other resource and when they were terminated. Because connected time is not calculated until the call is terminated, the connected time for a call that is still in progress is not reflected in the report.	Data Type: CSR Sum of Talk Duration + Sum of Hold Duration	
Wrap Up Time	The cumulative amount of time agents spent in the Wrap-up state after handling the calls.	Data Type: CSR Sum of Wrapup Duration	
Handle Time	The cumulative amount of time spent handling calls.	Data Type: CSR Connected Time + Wrapup Time	
Avg Queued Time	The total amount of time that calls were in queue divided by the total number of calls that were queued.		Queued Time/Queue Count. Queued Count is available in CSR, Queue Count in CAR
Avg Abandoned Time	The total amount of time that calls were in the system before they were abandoned divided by the total number of calls that were abandoned.	Data Type: CSR Abandoned Time/ Abandoned	
Avg Connected Time	The total connected time divided by the total number of calls that were answered during the report interval.		Connected Time/ (Answered + Secondary Answered) - Secondary Answered not computed
Avg WrapUp Time	The total amount of time agents spent in the Wrap-up state divided by the total number of answered calls.		Wrap Up Time/ (Answered + Secondary Answered)- Secondary Answered not computed
Avg Handle Time	The average length of time spent handling a call (connected time plus wrap-up time), divided by number of answered calls.		Connected Time+Wrap Up Time/(Answered + Secondary Answered)- Secondary Answered not computed
Avg Speed of Answer	The total answered time divided by the total number of answered calls.	Data Type: CSR Answered Time/ Answered	

## Historical Agent Report Mappings

The following table provides mappings between ACD historical agent report parameters available from the CJP Management Portal and historical agent report parameters available in Analyzer visualizations.

Portal Parameter	Description	Analyzer Parameter	Comments
Login Count	Total number of times an agent logged in on that day. Appears only if <b>Agents</b> is selected in the <b>Display Results By</b> drop-down list.	Data Type: ASR Count of Session ID	
Calls Handled	The total number of inbound and outdial calls handled.	Data Type: ASR Connected Count + Total outdial Connected Count	
Staff Hours	The total amount of time agents were logged in.	Data Type: ASR Staff Hours	
Initial Login Time	The date and time the agent logged in. This column appears only in agent-level summary reports.	Data Type: ASR Start Timestamp	
Final Logout Time	The date and time the agent logged out. This column appears only in agent-level summary reports.	Data Type: ASR End Timestamp	
Occupancy	The measure of time agents spent on calls compared to available and idle time.	Data Type: ASR (Total Inbound Connected Time + Total Wrap Up Time + Total Outdial Connected Time + Total Outdial Wrap Up Time, divided by Staff Hours).	
Idle	<b>Count.</b> The number of times an agent went into the Idle state.	Data Type: ASR Idle Count	
	<b>Total Time.</b> The total amount of time agents spent in the Idle state.	Data Type: ASR Total Idle Time	
	<b>Average Time.</b> The average length of time agents were in the Idle state.	Data Type: ASR Total Idle Time/Idle Count	
Available	<b>Count.</b> The number of times an agent went into the Available state.	Data Type: ASR Available Count	
	<b>Total Time.</b> The total amount of time agents spent in the Available state.	Data Type: ASR Total Available Time	
	<b>Average Time.</b> The average length of time agents were in the Available state.	Data Type: ASR Total Available Time/ Available	

## Appendix B: Mappings of ACD Metrics to Analyzer Parameters

Portal Parameter	Description	Analyzer Parameter	Comments
Inbound Reserved	<b>Count.</b> The number of times an agent went into the Inbound Reserved state.		Not Available
	<b>Total Time.</b> The total amount of time agents spent in the Reserved state, during which a call is coming in to an agent's station but has not yet been answered.	Data Type: ASR Total Ringing Time	
	<b>Average Time.</b> The average length of time agents were in the Inbound Reserved state.	Data Type: ASR Total Ringing Time/ Ringing Count	Not Computed, since Ringing count value is not available
Inbound Connected	<b>Hold Count.</b> The number of times an agent put an inbound caller on hold.	Data Type: ASR Hold Count	
	<b>Connected Count.</b> The number of inbound calls that were connected to an agent.	Data Type: ASR Connected Count	
	<b>Total Talk Time.</b> The total amount of time an agent was talking with a caller.	Data Type: ASR Total Connected Time— Total Hold Time	
	<b>Total Hold Time.</b> The total amount of time inbound calls were on hold.	Data Type: ASR Total Hold Time	
	<b>Total Time.</b> The total amount of time agents were connected to inbound calls.	Data Type: ASR Total Connected Time	
	<b>Average Hold Time.</b> The average hold time for inbound calls.	Data Type: ASR Total Hold Time/ Hold Count	
	<b>Average Time.</b> The average inbound connected time.	Data Type: ASR Total Connected Time/ Connected count	
Outdial Reserved	<b>Count.</b> The number of times an agent was in the Outdial Reserved state, a state indicating that the agent has initiated an outdial call, but the call is not connected yet.	Data Type: ASR Outdial Ringing Count	
	<b>Total Time.</b> The total amount of time agents were in the Outdial Reserved state	Data Type: ASR Total Outdial Ringing Time	
	<b>Average Time.</b> The average amount of time agents were in the Outdial Reserved state.	Data Type: ASR Total Outdial Ringing Time/ Outdial Ringing Count	

Portal Parameter	Description	Analyzer Parameter	Comments
Outdial Connected	<b>Attempted Count.</b> The number of times an agent attempted to make an outdial call.	Data Type: ASR Outdial Ringing Count	
	<b>Connected Count.</b> The number of outdial calls that were connected to an agent.	Data Type: ASR Outdial Connected Count	
	<b>Hold Count.</b> The number of times an agent put an outdial call on hold.	Data Type: ASR Outdial Hold Count	
	<b>Total Talk Time.</b> The total amount of time an agent was talking with a party on an outdial call.	Data Type: ASR Total Outdial Connected Time—Total Outdial Hold Time	
	<b>Total Hold Time.</b> The total amount of time outdial calls were on hold.	Data Type: ASR Total Outdial Hold Time	
	<b>Total Time.</b> The total amount of time agents were connected to outdial calls.	Data Type: ASR Outdial Connected Time	
	<b>Average Hold Time.</b> The average hold time for outdial calls.	Data Type: ASR Total Outdial Hold Time/ Outdial Hold Count	
	<b>Average Time.</b> The average outdial connected time.	Data Type: ASR Total Outdial Connected Time/ Outdial Connected Count	
Disconnected Count	The number of calls that were connected to an agent, but that were then immediately disconnected within the Sudden Disconnect threshold provisioned for the enterprise.	Data Type: ASR Disconnected Count	
Inbound Wrap Up	<b>Count.</b> The number of times agents went into the Wrap-up state after an inbound call.	Data Type: ASR Wrapup Count	
	<b>Total Time.</b> The total amount of time agents spent in the Wrap-up state after an inbound call.	Data Type: ASR Total Wrapup Time	
	<b>Average Time.</b> The average length of time agents were in the Wrap-up state after an inbound call.	Data Type: ASR Total Wrapup Time/ Wrapup Count	

Portal Parameter	Description	Analyzer Parameter	Comments
Outdial Wrap Up	<b>Count.</b> The number of times agents went into the Wrap-up state after an outdial call.	Data Type: ASR Outdial Wrapup Count	
	<b>Total Time.</b> The total amount of time agents spent in the Wrap-up state after an outdial call.	Data Type: ASR Total Outdial Wrapup Time	
	<b>Average Time.</b> The average length of time agents were in the Wrap-up state after an outdial call.	Data Type: ASR Total Outdial Wrapup Time/Outdial Wrapup Count	
Not Responding	<b>Count.</b> The number of times an agent was in the Not Responding state.	Data Type: ASR Not Responding Count	
	<b>Total Time.</b> The total amount of time agents spent in the Not Responding state.	Data Type: ASR Total Not Responding Time	
	<b>Average Time.</b> The average length of time agents were in the Not Responding state.	Data Type: ASR Total Not Responding Time/Not Responding Count	
Consult Answer	<b>Count.</b> The number of times agents answered a consult request from another agent.	Data Type: ASR Consult Count	
	<b>Total Time.</b> The total amount of time agents spent answering consult requests.	Data Type: ASR Total Consult Time	
	<b>Average Time.</b> The average length of time agents spent answering consult requests.	Data Type: ASR Total Consult Time/Consult Count	
Consult Request	<b>Count.</b> The number of times agents sent a consult request to another agent.	Data Type: ASR Consult Request Count	
	<b>Total Time.</b> The total amount of time agents spent consulting other agents.	Data Type: ASR Total Consult Request Time	
	<b>Average Time.</b> The average length of time agents spent consulting other agents.	Data Type: ASR Total Consult Request Time/Consult Request Count	

Portal Parameter	Description	Analyzer Parameter	Comments
Consult	<b>Count.</b> The number of times agents answered consult requests plus the number of times agents consulted other agents.	Data Type: ASR Consult Answer Count	
	<b>Total Time.</b> Total Consult Answer Time plus Total Consult Request Time.	Data Type: ASR Total Consult Answer Time	
	<b>Average Time.</b> The average length of consulting time.	Data Type: ASR Total Consult Answer Time/Consult Answer Count	
Conference	The number of times an agent initiated a conference call.	Data Type: ASR Conference Count	
Inbound CTQ Request	<b>Count.</b> The number of times agents initiated a consult to queue while handling an inbound call.	Data Type: ASR CTQ Request Count	
	<b>Total Time.</b> The total amount of time agents spent answering consult-to-queue requests from an agent handling an inbound call.	Data Type: ASR CTQ Request Time	
Inbound CTQ Answer	<b>Count.</b> The number of times agents answered a consult-to-queue request from another agent who was handling an inbound call.	Data Type: ASR CTQ Answer Count	
	<b>Total Time.</b> The total amount of time agents spent answering consult-to-queue requests from an agent handling an inbound call.	Data Type: ASR CTQ Answer Time	
Outdial CTQ Request	<b>Count.</b> The number of times agents initiated a consult-to-queue request while handling an outdial call.	Data Type: ASR Outdial CTQ Request Count	
	<b>Total Time.</b> The total amount of time agents spent answering consult-to-queue requests from an agent handling an outdial call.	Data Type: ASR Total Outdial CTQ Request Time	
Outdial CTQ Answer	<b>Count.</b> The number of times agents answered a consult-to-queue request from another agent who was handling an outdial call.	Data Type: ASR Outdial CTQ Answer Count	
	<b>Total Time.</b> The total amount of time agents spent answering consult-to-queue requests from an agent handling an outdial call.	Data Type: ASR Total Outdial CTQ Answer Time	

Portal Parameter	Description	Analyzer Parameter	Comments
Agent Transfer	The number of times an agent transferred an inbound call to another agent.	Data Type: ASR Agent to Agent XFER Count	
Agent Requeue	The number of times an agent requeued an inbound call.	Data Type: ASR Agent XFER To QUE Request Count	
Blind Transfer	The number of times an agent transferred an inbound call without consulting first.	Data Type: ASR Blind XFER Count	
Inbound Avg Handle Time	The average length of time spent handling an inbound call (Total Inbound Connected Time plus Total Wrap Up Time, divided by Inbound Connected Count).	Data Type: ASR Same formula as ACD	
Outdial Avg Handle Time	The average length of time spent handling an outdial call (Total Outdial Connected Time plus Total Outdial Wrap Up Time, divided by Outdial Connected Count).	Data Type: ASR Same formula as ACD	

## Real-Time Call Report Mappings

The following table provides mappings between ACD real-time call report parameters available from the CJP Management Portal and real-time call report parameters available in Analyzer visualizations.

Call report parameters that are available in both real-time and historical call reports are described in “[Historical Call Report Mappings](#)” beginning on [page 77](#).

Portal Parameter	Description	Analyzer Parameter	Comments
Entry Point	The name of an entry point.	The name of an entry point.	
Queue	The name of a queue.	Queue Name	
Site	The name of a site (appears only in site-level and team-level reports)	Site Name	
Team	The name of a team (appears only in team-level reports).	Team Name	
Skill	The name of a skill.		
In IVR	The number of calls that are currently in the IVR system.	Data Type: CSR Count Of Session ID, Current State = IVR—Connected	

Portal Parameter	Description	Analyzer Parameter	Comments
In Queue	The number of calls currently in the queues that are covered in the report. In the case of entry-point reports, this is the number of calls that are currently in queues fed by the entry point.	Data Type: CSR Count Of Session ID, Current State = Parked	
Connected	The number of calls currently connected to an agent.	Data Type: CSR Count Of Session ID, Current State = Connected	
Current Service Level %	The percentage of calls in queue that have not yet reached the Service Level threshold provisioned for the queue (in a queue report) or skill (in the skill rows of a skills-by-queue report).	Data Type: CSR Count of Session ID with Filter Queue Duration<= <Service level threshold value>	
Logged-in Agents	The number of agents who are currently logged in to this team or to all teams at this site. At the queue level, this is the number of agents logged in to all teams at the sites serving this queue.	Data Type: CSR Count Of Agent ID	
Available Agents	The number of logged-in agents who are currently in the Available state.	Data Type: AAR Count Of Agent ID, Current State=Available	
Longest Call in Queue Time	The longest amount of time a call has been in each queue covered in the report.	Data Type: CSR Maximum Queue Duration	

## Real-Time Agent Report Mappings

The following table provides mappings between real-time agent report parameters available from the CJP Management Portal and real-time agent report parameters available in Analyzer visualizations.

Agent report parameters that are available in both real-time and historical agent reports are described in “[Historical Agent Report Mappings](#)” beginning on [page 83](#).

Portal Parameter	Description	Analyzer Parameter	Comments
Site	The name of a site.	Site Name	
Total Logged In	The number of agents currently logged in.	Data Type: AAR Count of Agent Session ID	
Channels Logged In	The number of media channels to which agents are currently logged in.	Data Type: AAR Count of Channel Type	
Idle	The number of agents currently in the Idle state.	Data Type: AAR Count Of Agent Session ID, Current State = Idle	

## Appendix B: Mappings of ACD Metrics to Analyzer Parameters

Portal Parameter	Description	Analyzer Parameter	Comments
Available	The number of agents currently in the Available state.	Data Type: AAR Count Of Agent Session ID, Current State = Available	
Reserved	The number of agents currently in the Reserved state, during which a call is coming in but has not yet been answered.	Data Type: AAR Count Of Agent Session ID, Current State = Ringing	
Connected	The number of agents currently connected to an inbound call.	Data Type: AAR Count Of Agent Session ID, Current State = Connected	
Talk	The number of agents in the Connected state who are currently talking with a caller.	Data Type: AAR Count Of Agent Session ID, Current State = Connected	
Hold	The number of agents in the Connected state who have placed the caller on hold.	Data Type: AAR Count Of Agent Session ID, Current State = on-hold	
Consulting	The number of agents currently consulting with another agent.	Data Type: AAR Count Of Agent Session ID, Current State = ConnectedConsulting	
CTQ	The number of agents currently consulting with another agent after initiating or answering a consult-to-queue request.	Data Type: AAR Sum of CTQ Count	
Wrap Up	The number of agents currently in the Wrap-up state.	Data Type: AAR Count Of Agent Session ID, Current State = WrapUp	
Not Responding	The number of agents currently in the Not Responding state.	Data Type: AAR Count Of Agent Session ID, Current State = NotResponding	
In Outdial	The number of agents who are connected to or are wrapping up an outdial call (a call made from the CJP Agent Desktop by entering a phone number in the Call Out field).	Data Type: AAR Count Of Agent Session ID, Outdial Flag >= 1	

## Historical Multimedia Report Mappings

The following table provides mappings between ACD historical multimedia report parameters available from the CJP Management Portal and historical multimedia report parameters available in Analyzer visualizations.

Portal Parameter	Description	Analyzer Parameter	Comments
Channel Type	The channel type selected among	Channel Type	
Total Received	The total number of interactions from all origination types.	Count of SessionId	
Handled	The total number of interactions handled	Count of SessionId	
Queued	The number of interactions that entered the queue.	Count of SessionId	
Queue Name	The name of the queue associated with the interactions.	Queue Name	
Wrapup Code Name	The wrap-up code that the agent gave for the interaction.	Wrapup Code Name	

