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## Work with Genesys CX Insights Reports

[Transfer Dashboard](#)

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- Administrator
- Supervisor

Learn about how agent time was spent when handling contact center interactions that involve a transfer, consult, or conference, whether warm or cold.

### Related documentation:

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### RSS:

- [For private edition](#)

Video: The Transfer Dashboard overview.

[Link to video](#)

This video describes the Transfer Dashboard.

The screenshot shows a complex data table with multiple columns. The columns are grouped into three main sections: Transfer Analysis (with sub-columns for Transfer, Transfer Time, Transfer Rate, Transfer Cost, Transfer Revenue, Transfer Profit, Transfer Loss, Transfer Margin, Transfer ROI, Transfer Break-Even Point, Transfer Payback Period, Transfer NPV, Transfer IRR, Transfer MIRR, Transfer XIRR, Transfer YTD, Transfer QTD, Transfer MTD, Transfer WTD, Transfer DTD, Transfer YTD, Transfer QTD, Transfer MTD, Transfer WTD, Transfer DTD), Agent Summary (with sub-columns for Agent, Agent Type, Agent Status, Agent Role, Agent Location, Agent Time, Agent Cost, Agent Revenue, Agent Profit, Agent Loss, Agent Margin, Agent ROI, Agent Break-Even Point, Agent Payback Period, Agent NPV, Agent IRR, Agent MIRR, Agent XIRR, Agent YTD, Agent QTD, Agent MTD, Agent WTD, Agent DTD), and Agent Transfer Summary (with sub-columns for Agent, Agent Type, Agent Status, Agent Role, Agent Location, Agent Time, Agent Cost, Agent Revenue, Agent Profit, Agent Loss, Agent Margin, Agent ROI, Agent Break-Even Point, Agent Payback Period, Agent NPV, Agent IRR, Agent MIRR, Agent XIRR, Agent YTD, Agent QTD, Agent MTD, Agent WTD, Agent DTD). The table contains many rows of data, with some cells highlighted in green and others in orange.

The Agent Transfer Summary tab

The **Transfer** Dashboard provides a dashboard-style summary that tracks a wide variety of metrics related to transfers, consult, and conference calls.

The Transfer Dashboard provides two distinct views of the data, on two tabs:

- The Agent Transfer Summary tab — This tab provides summary information about how individual agents spent time when handling contact center interactions that involve a transfer, consult, or conference, whether warm or cold.



The Daily Transfer Summary tab

- The Daily Transfer Summary tab — This tab provides summary information about how agents spent time in aggregate (over the course of a day) when handling contact center interactions that involved a transfer, consult, or conference, whether warm or cold.

### Tip

The term 'dashboard' is used interchangeably with the term 'dossier'. Dashboards / dossiers provide an interactive, intuitive data visualization, summarizing key business indicators (KPIs). You can change how you view the data by using interactive features such as selectors, grouping, widgets, and visualizations, and explore data using multiple paths, though text, data filtering, and layers of organization.

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

[Sample Transfer Dashboard.pdf](#)

## Prompts on the Transfer Dashboard

The following table explains the prompts you can select when you generate the Transfer Dashboard:

**Prompts on the Transfer Dashboard**

| Prompt              | Description   |
|---------------------|---|
| Pre-set Date Filter | Choose a date from the list of preset options. If this prompt is set to anything other than <b>none</b> , the Report Date prompt is ignored. Default: <b>Year to Date</b> |
| Start Date          | Choose the first date on which to report. This prompt has no effect if Pre-set Date Filter is set to anything other than <b>none</b> .                                    |
| End Date            | Choose the last date on which to report. This prompt has no effect if Pre-set Date Filter is set to anything other than <b>none</b> .                                     |
| Agent Group         | Select one or more agent groups on which to focus the report.   |
| Agent               | Select one or more agents on which to focus the report.   |

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| Media Type       | Select one or more media types on which to focus the report.       |
| Interaction Type | Select one or more interaction types on which to focus the report. |
| Tenant           | Select one or more tenants on which to focus the report.           |

## Attributes and Metrics on the Agent Transfer Summary tab

The following table explains the attributes used on this tab:

**Attributes on the Agent Transfer Summary tab**

| Attribute        | Description  |
|------------------|--|
| Agent Name       | Enables the organization of data based on Agent Name.  |
| Day              | Enables the organization of data based on the day/ date on which the interaction occurred.               |
| Interaction Type | Enables the organization of data based on interaction type. For example: Inbound, Outbound, or Internal. |
| Media Type       | Enables the organization of data based on media type. For example: Voice, Email, or Chat.                |

The following table explains the metrics used on the Agent Transfer Summary tab:

**Metrics on the Agent Transfer Summary tab**

| Metrics                       | Description  |
|-------------------------------|--|
| Unique Interactions: Entered  | The total number of customer interactions that entered or began within the contact center and were assigned this business attribute. This count includes abandoned interactions.                                   |
| Unique Interactions: Accepted | The total number of customer interactions of this business attribute that were accepted, answered, pulled, or initiated by a handling resource.  |
| Offered                       | Total number of times that interactions were received or initiated (by this Agent, Agent Group, or Agent and Queue, depending on the relevant GCXI Project attributes for this metric).                            |
| Accepted                      | Total number of times that interactions/warm consultations were accepted, answered, pulled, or initiated (by Agent, Group, or Agent and Queue, depending on the relevant GCXI Project attributes for this metric). |
| Avg Handle Time               | The average amount of time, in seconds, spent handling interactions received (by this Agent, Agent Group, or Agent and Queue, depending on   |

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|   | the relevant GCXI Project attributes for this metric).  |
| Transfer Offered                                    | Total number of times that customer interactions arrived by transfer and were offered (for this Agent, Agent Group, or Agent and Queue, depending on the relevant GCXI Project attributes for this metric).   |
| Receiving Transfers: Transfer Accepted              | The total number of times that customer interactions were successfully transferred (for this Agent, Agent Group, or Agent and Queue, depending on the relevant GCXI Project attributes for this metric).  |
| Receiving Transfers: Transfer Accepted Cold         | The total number of times that customer interactions were successfully cold transferred and accepted by the agent / agent group (depending on the relevant GCXI Project attributes for this metric) during the reporting interval.  |
| Receiving Transfers: Transfer Accepted Warm         | The total number of times that customer interactions were successfully warm transferred and accepted by the agent / agent group (depending on the relevant GCXI Project attributes for this metric) during the reporting interval.  |
| Initiating Transfers: Transfer Initiated Agent      | The total number of customer interactions of this business attribute that agents transferred. Both warm and blind transfers are reflected in this Metric.   |
| Initiating Transfers: Transfer Initiated Agent Cold | Total number of cold transfers initiated by the agent / agent group (depending on the relevant GCXI Project attributes for this metric) during the reporting interval.  |
| Initiating Transfers: Transfer Initiated Agent Warm | Total number of warm transfers initiated by the agent / agent group (depending on the relevant GCXI Project attributes for this metric) during the reporting interval.  |
| Initiating Transfers: % Transfer Initiated          | The percentage of accepted customer interactions that were transferred (warm or blind) (for this Agent or Agent Group, depending on the relevant GCXI Project attributes for this metric).  |
| Avg Received Transfers Handle Time: All             | The average amount of time, in seconds, that agents spent handling interactions assigned this business attribute, that arrived by transfer and were accepted by the agents during the reporting interval. (Based on Business Attribute > BA Consults > Avg Transfer Accepted Handle Time) |
| Avg Received Transfers Handle Time: This Agent      | Average Handle Time for the interactions that arrived by transfer and were handled during the reporting interval. This metric includes only the time spent by the receiving agent. (Agent > Activity > Avg Transfer Accepted Handle Time)   |
| Average Transfer Initiated Handle Time (this Agent) | Average Handle Time for the interactions that were transferred and handled during the reporting interval. This metric includes only the time spent by the transferring agent.   |

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| Conference Participation by the Agent: Conference Offered   | The total number of Conference interactions offered to the agent / agent group (depending on the relevant GCXI Project attributes for this metric) during the reporting interval.   |
| Conference Participation by the Agent: Conference Accepted  | The total number of times that this Agent, Agent Group, or Agent and Queue (depending on the relevant GCXI Project attributes for this metric) joined conferences to participate in customer interactions. (Based on Agent > Activity > Conference Received Accepted)                               |
| Conference Participation by the Agent: Conference Initiated | The total number of times that this Agent, Agent Group, or Agent and Queue, (depending on the relevant GCXI Project attributes for this metric) successfully initiated conferences for received customer interactions.  |
| Consult Participation by the Agent: Consult Offered         | The total number of Consult interactions offered to the agent / agent group (depending on the relevant GCXI Project attributes for this metric) during the reporting interval.  |
| Consult Participation by the Agent: Consult Accepted        | Total number of times collaborations/consultations associated with interactions were received and accepted by Agent, Group, or Agent and Queue, (depending on the relevant GCXI Project attributes for this metric). (Based on Agent > Activity > Consult Received Accepted)                        |
| Consult Participation by the Agent: Consult Initiated       | The total number of collaborations/consultations associated with interactions and initiated by the Agent, Agent Group, or Agent and Queue, depending on the relevant GCXI Project attributes for this metric.   |
| Avg Conference Accepted Handle Time (this Agent)            | Average Handle Time for Conference interactions in which the agent participated. This metric includes time spent by all agents who participated in handling the interaction after this agent joined.  |
| Avg Consult Participation Handle Time: All                  | The average amount of time, in seconds, that agents spent in collaboration or simple consultation for customer interactions that were assigned this business attribute. (Based on Business Attribute > BA Consults > Avg Consult Received Time)   |
| Avg Consult Participation Handle Time: This Agent           | Average number of seconds that the agent was engaged as a recipient in collaborations/consultations associated with interactions (for Agent, Group, or Agent and Queue, depending on the relevant GCXI Project attributes for this metric). (Based on Agent > Activity > Avg Consult Received Time) |

## Attributes and Metrics on the Daily Transfer Summary tab

The following table explains the attributes used on this tab:

**Attributes on the Daily Transfer Summary tab**

| <b>Attribute</b> | <b>Description</b>   |
|------------------|--|
| Day              | Enables the organization of data based on the day/ date on which the interaction occurred.               |
| Media Type       | Enables the organization of data based on media type. For example: Voice, Email, or Chat.                |
| Interaction Type | Enables the organization of data based on interaction type. For example: Inbound, Outbound, or Internal. |

The following table explains the metrics used on the Daily Transfer Summary tab:

**Metrics on the Daily Transfer Summary tab**

| <b>Metrics</b>                                | <b>Description</b>   |
|---|--|
| Unique Interactions: Offered                  | The total number of customer interactions that entered or began within the contact center during the interval, were assigned this business attribute, and were offered to a resource excluding interactions that were abandoned within the short-abandoned threshold. This metric relies on the value of the short-abandoned threshold as configured in the [agg-gim-thId-ID-IXN] section. |
| Unique Interactions: Accepted                 | The total number of customer interactions of this business attribute that were accepted, answered, pulled, or initiated by a handling resource.  |
| Unique Interactions: Avg Handle Time          | The average amount of time, in seconds, that agents spent handling interactions assigned this business attribute.  |
| Initiating Transfers: Transfer Initiated      | The total number of customer interactions of this business attribute that agents transferred. Both warm and blind transfers are reflected in this Metric.  |
| Initiating Transfers: Transfer Initiated Cold | Total number of cold transfers of interactions assigned this business attribute, that were initiated by the agent during the reporting interval.   |
| Initiating Transfers: Transfer Initiated Warm | Total number of warm transfers of interactions assigned this business attribute, that were initiated by the agent during the reporting interval.   |
| Receiving Transfers: Transfer Accepted        | Total number of interactions, assigned this business attribute, that arrived by transfer and were accepted by the agent during the reporting interval.   |
| Receiving Transfers: Transfer Accepted Cold   | Total number of interactions, assigned this business attribute, that arrived by cold transfer and were accepted by the agent during the reporting interval.  |
| Receiving Transfers: Transfer Accepted Warm   | Total number of interactions, assigned this business attribute, that arrived by warm transfer and were offered to the agent during the reporting interval.   |

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| Receiving Transfers: Avg Transfer Accepted Handle Time | The average amount of time, in seconds, that agents spent handling interactions assigned this business attribute, that arrived by transfer and were accepted by the agent during the reporting interval. |
| Transfer Rate  | The percentage of interactions that were transferred. Calculated as the total number of transferred interactions divided by the total number of interactions.  |
| Conference Initiated Agent                             | The total number of times that agents initiated conferences for customer interactions that the agents received where the interactions were established and were of this business attribute.              |
| Consult Received Accepted                              | The total number of interactions of this business attribute that included requests for collaboration or consultation where the collaborations/consultations were associated with customer interactions.  |