Work with Genesys CX Insights Reports

Transfer Dashboard

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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 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 **none**, the Report Date prompt is ignored. Default: **Year to Date**
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 **none**.
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 **none**.
Agent Group	Select one or more agent groups on which to focus the report.
Agent	Select one or more agents on which to focus the report.

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

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

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

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

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

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

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

Metrics on the Daily Transfer Summary tab

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

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