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Work with Genesys CX Insights Reports

[Transfer Dashboard](#)

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-  **Business Performance**

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

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- For private edition

Link to video

Transfer Dashboard										Transfer Analysis - Agent Summary										Agent Transfer Summary									
Agent ID	Agent Name	Status	Transfer History				Transfer Details				Transfer Status				Transfer Date				Transfer Location										
			From	To	When	How	From	To	When	How	From	To	When	How	From	To	When	How											
Agent A	John Doe	Active	1001	1002	2023-01-15	Phone	1001	1002	2023-01-15	Phone	1001	1002	2023-01-15	Phone	1001	1002	2023-01-15	Phone											
	Jane Smith	Active	1002	1003	2023-02-01	Phone	1002	1003	2023-02-01	Phone	1002	1003	2023-02-01	Phone	1002	1003	2023-02-01	Phone											
	Mike Johnson	Active	1003	1004	2023-02-15	Phone	1003	1004	2023-02-15	Phone	1003	1004	2023-02-15	Phone	1003	1004	2023-02-15	Phone											
	Sarah Lee	Active	1004	1005	2023-03-01	Phone	1004	1005	2023-03-01	Phone	1004	1005	2023-03-01	Phone	1004	1005	2023-03-01	Phone											
Agent B	David Brown	Active	1005	1006	2023-03-15	Phone	1005	1006	2023-03-15	Phone	1005	1006	2023-03-15	Phone	1005	1006	2023-03-15	Phone											
	Emily White	Active	1006	1007	2023-04-01	Phone	1006	1007	2023-04-01	Phone	1006	1007	2023-04-01	Phone	1006	1007	2023-04-01	Phone											
	Chris Green	Active	1007	1008	2023-04-15	Phone	1007	1008	2023-04-15	Phone	1007	1008	2023-04-15	Phone	1007	1008	2023-04-15	Phone											
	Alex Black	Active	1008	1009	2023-05-01	Phone	1008	1009	2023-05-01	Phone	1008	1009	2023-05-01	Phone	1008	1009	2023-05-01	Phone											
Agent C	Olivia Taylor	Active	1009	1010	2023-05-15	Phone	1009	1010	2023-05-15	Phone	1009	1010	2023-05-15	Phone	1009	1010	2023-05-15	Phone											
	Benjamin Clark	Active	1010	1011	2023-06-01	Phone	1010	1011	2023-06-01	Phone	1010	1011	2023-06-01	Phone	1010	1011	2023-06-01	Phone											
	Mia Evans	Active	1011	1012	2023-06-15	Phone	1011	1012	2023-06-15	Phone	1011	1012	2023-06-15	Phone	1011	1012	2023-06-15	Phone											
	Noah Harris	Active	1012	1013	2023-07-01	Phone	1012	1013	2023-07-01	Phone	1012	1013	2023-07-01	Phone	1012	1013	2023-07-01	Phone											
Agent D	Ava King	Active	1013	1014	2023-07-15	Phone	1013	1014	2023-07-15	Phone	1013	1014	2023-07-15	Phone	1013	1014	2023-07-15	Phone											
	Liam Scott	Active	1014	1015	2023-08-01	Phone	1014	1015	2023-08-01	Phone	1014	1015	2023-08-01	Phone	1014	1015	2023-08-01	Phone											
	Isabella Adams	Active	1015	1016	2023-08-15	Phone	1015	1016	2023-08-15	Phone	1015	1016	2023-08-15	Phone	1015	1016	2023-08-15	Phone											
	Ethan Nelson	Active	1016	1017	2023-09-01	Phone	1016	1017	2023-09-01	Phone	1016	1017	2023-09-01	Phone	1016	1017	2023-09-01	Phone											
Agent E	Avery Parker	Active	1017	1018	2023-09-15	Phone	1017	1018	2023-09-15	Phone	1017	1018	2023-09-15	Phone	1017	1018	2023-09-15	Phone											
	Lucas Miller	Active	1018	1019	2023-10-01	Phone	1018	1019	2023-10-01	Phone	1018	1019	2023-10-01	Phone	1018	1019	2023-10-01	Phone											
	Sophia Wilson	Active	1019	1020	2023-10-15	Phone	1019	1020	2023-10-15	Phone	1019	1020	2023-10-15	Phone	1019	1020	2023-10-15	Phone											
	Leo Moore	Active	1020	1021	2023-11-01	Phone	1020	1021	2023-11-01	Phone	1020	1021	2023-11-01	Phone	1020	1021	2023-11-01	Phone											

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

Work with Genesys CX Insights Reports

- 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-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.

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.