Work with Genesys CX Insights Reports

Capture Point Business Value Report

2/1/2026

Contents

Explore the distribution of tasks by process and point of entry (capture point) into the iWD system.

Related documentation:

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This page describes how you (as a business user) can use the (**CX Insights for iWD** folder) **Capture Point Business Value Report** to understand the distribution of tasks by process and point of entry (capture point) into the iWD system. You can use this information to assess whether the time to complete tasks correlates with the desired business value and time to complete for a busy enterprise, which can help you to better tune priority schema and priority levels for processes, capture points and departments.

Understanding the Capture Point Business Value Report

Capture Point Business Value Report

Capture Point	Department	Process	Category Level 3	Category Level 4	Category Level 5	Media Type	Business Value Range 100	Day	Entered	Finished	Avg Accept Time (Fmt)	Avg Finish Time (Fmt)
capture_point1	Department 10	Process 9		Beige	Silver	Unclassified	workitem	1-100	2021-05-03	1	1	00:00:35	00:01:20
							Total		1	1	00:00:35	00:01:20
						Total			1	1	00:00:35	00:01:20
				Blanched Almond	Medium Purple	Honeydew	workitem	1-100	2021-05-01	1	0	00:00:00	00:00:00
									2021-05-02	0	1	12:41:40	12:42:23
							Total		1	1	12:41:40	12:42:23
						Total			1	1	12:41:40	12:42:23
				Crimson	Khaki	Gold	email	1-100	2021-05-03	1	1	00:00:35	00:01:23
							Total		1	1	00:00:35	00:01:23
						Total			1	1	00:00:35	00:01:23
				Gold	Honeydew	Unclassified	workitem	1-100	2021-05-04	1	1	00:00:35	00:01:21
							Total		1	1	00:00:35	00:01:21
						Total			1	1	00:00:35	00:01:21
			Green	Beige	Unclassified	workitem	1-100	2021-05-01	1	1	00:00:35	00:01:29
							Total		1	1	00:00:35	00:01:29
						Total			1	1	00:00:35	00:01:29
				Rosy Brown	Khaki	email	1-100	2021-05-02	1	1	00:00:35	00:01:16
							Total		1	1	00:00:35	00:01:16
						Total			1	1	00:00:35	00:01:16
			Honeydew	Khaki	Aqua	workitem	1-100	2021-05-01	1	1	00:00:35	00:01:19
									2021-05-03	1	1	00:00:35	00:01:26
							Total		2	2	00:00:35	00:01:23
						Total			2	2	00:00:35	00:01:23
										1		03:39:09	

For each record, the report displays the business value range into which the tasks fall as well as the average time that it took to complete the tasks. For each capture point, the report plots the total number of finished tasks against their assigned business value range.

Although this report is defined using the Business Value Range attribute, you can drill along this attribute to display larger ranges in which business value of the task capture falls.

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

SampleCapturePointBusinessValueReport.pdf

Prompts in the Capture Point Business Value Report

Prompt	Description
Pre-set Date Filter	Choose from the convenient list of predefined rolling time ranges, spanning one day or more, over which to run the report.
Start Time	Choose the first day and time from which to gather report data.
End Time	Choose the last day and time from which to gather report data.
Department	Optionally, select a department on which to focus the report.
Process	Optionally, select a business process on which to focus the report.

Prompt	Description
Capture Point	Optionally, select a Capture Point on which to focus the report.
Media Type	Optionally, select one or more media types for which to gather data into the report.
Category Level 3	Optionally, select one or more Category Level 3 from which to gather data for the report.
Category Level 4	Optionally, select one or more Category Level 4 from which to gather data for the report.
Category Level 5	Optionally, select one or more Category Level 5 from which to gather data for the report.

Attributes in the Capture Point Business Value Report

Attribute	Description
Department	Enables data to be organized by the name of the department for which iWD prioritizes and routes tasks.
Capture Point	Enables data to be organized by the name of the capture point that acquired tasks from the source system.
Process	Enables data to be organized by the name of the business process, which is a core attribute of tasks and work items that define strategies for how to route them.
Media Type	Enables data to be organized by media type.
Business Value Range 100	Enables data to be organized by the range in which the business value of the task capture falls. Ranges are character values that have a granularity of 100—for example: 1–100, 101–200, 201–300. For instructions about customizing the granularity of data in this dashboard, see Customizing the report.
Day	Enables data within the reporting interval to be organized by a particular day within a month and year. Day values are presented in YYYY-MM-DD format.
Category Level 3	Enables data to be organized by the 3rd category level.
Category Level 4	Enables data to be organized by the 4th category level.
Category Level 5	Enables data to be organized by the 5th category level.

Metrics in the Capture Point Business Value Report

Metric	Description
Finished	The total number of tasks that entered the iWD system through this capture point and were finished during the reporting interval.
Canceled	The total number of tasks that entered the iWD system through this capture point and were canceled during the reporting interval.
Completed	The total number of tasks that entered the iWD system through this capture point and were completed during the reporting interval.
Avg Finish Time	The average amount of time that elapsed before tasks that entered the iWD system through this capture point were completed. This measure includes the time that tasks were backlogged as well as work time.
Avg Accept Time	For completed tasks, the average amount of time that elapsed before tasks that entered the iWD system through this capture point were assigned to a resource for the first time. This metric reflects how long, on average, tasks were backlogged.

Custom metrics

Metric	Description
Canceled Autocompleted	The total number of email tasks of this classification that were automatically canceled during the reporting interval.
Canceled NON Autocompleted	The total number of canceled tasks in this classification that were not automatically canceled during the reporting period.
Completed Agent	The total number of tasks that were completed during the reporting interval and in which one or more agents were involved.
Completed NON Agent	The total number of tasks of this classification that were completed during the reporting interval for tasks where no agents were involved (via API, designer, etc.).
Finished Agent	The total number of tasks of this classification that were finished (completed or canceled) during the reporting interval for tasks where an agent was involved.

Customizing the report

Some dashboards contain attributes representing different granularity of an attribute, such as Priority Range, or Business Value. You can change the granularity of the data shown in the report by replacing this attribute with another; this procedure uses Business Value Range in the Capture Point Business Value Report as an example.

Changing the granularity of the report data

Changing the granularity of the report data

Change the granularity range of an attribute. In this example, we change the Capture Point Business Value Report, which by default is configured to use the "Business Value Range 100" attribute.

1. Log in with an account having Administrator privileges.
2. Open and run the report. It's best to modify a copy of the report, rather than the original:
   1. Click **Report Home** > **Save As**.
   2. In the **Save As** editor:
      1. In the **Save in** list, choose one of the following paths:

- **Shared Reports** > **Custom** — to make the modified report accessible to other users.

- **My Reports** — to make the modified report accessible only to you.

2. Enter a **Name** for the report, and optionally modify the **Description**.

3. Click **OK**.

3. In the **Report Saved** editor, click **Run newly saved report**, and answer the prompts to generate the report.

3. You can now modify the report:

1. From the **Report Objects** menu, click **All Objects**.
   In the **All Objects** hierarchy, drag the new attribute (for example **Business Value Range 1000**) into the report,releasing the left mouse button when over the appropriate location in the report.

2. Drag the unwanted attribute (for example **Business Value Range 100**) out of the report grid.

4. Click **Report Home** > **Save**. Rerun the report to verify the results.