

3.13 Reporting Reference Guide

Bright Pattern Documentation

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Table of Contents

Table of Contents	2
Purpose	4
Audience	4
General Information About Access to Reports and Records	4
Report Generation	5
Interaction Records Search	6
List of Interaction Records Search Criteria	8
Global Interaction Identifier	9
Agent Activity Search	12
General Information About Quality Management	12
Call Recordings	13
Chat Transcripts	14
Exporting Chat Transcripts	16
Emailing Chat Transcripts to Customers	16
How to Set up the Chat Scenario	16
Step 1	17
Step 2	17
Step 3	18
Step 4	19
Step 5	19
Step 6	20
Step 7	21
What the Customer Sees	22
Email Messages	23
Screen Recordings	24
General Information About Detail Reports	25
Agent Activity Report	25
Call Detail Report	27
Email Detail Report	29
General Information About Aggregate Reports	31
Agent Performance Report	31
Agent Time Allocation Report	32
Intra-Team by Service Report	33
Intra-Team Performance Report	34
Team Operation Quality Report	35
Team Performance Report	36
Scenario Block Disconnects Report	36
Scenario Block Frequency Report	37
Requested Skills Report	37
Service in Time Report	38
Service Metrics Report	39
Service Staffing and Overflow Report	40
Virtual Queue (Callback) Report	41
Campaign in Time Report	42
Dispositions in Time Report	43
Telemarketing Compliance Report	44
Email Service Report	44
Agent Email Report	45
Team Email Report	46
Concurrent Users Report	47

Carrier Usage Reports	47
Simple Format	48
Detailed Format	49
Recordings Details Format	52

Purpose

ServicePattern Reporting Reference Guide describes the reports available out of the box with the ServicePattern contact center solution. These reports contain key performance indicators for the main contact center resources such as agents, agent teams, services, and scenarios.

The guide also explains how to interpret campaign results and how to search for interaction records, and review associated call recordings and chat transcripts.

[Next >](#)

Audience

This guide is intended for personnel responsible for contact center operations including:

- Definition of contact center services and interaction processing scenarios
- Contact center workforce management
- Assessment of contact center efficiency and quality of customer service
- Outbound campaign definition and execution
- General contact center management

[< Previous](#) | [Next >](#)

General Information About Access to Reports and Records

The web application that you use to access reports and call recordings is called *Contact Center Administrator*. For general information about this application, see [ServicePattern Contact Center Administrator Guide](#).

To generate and view reports or to access interaction records, log into Contact Center Administrator and select the **Reports** view from the upper bar menu.



Access to records and reports

Note that depending on the tasks you are going to perform, you must have an assigned role that contains some or all of the following privileges: *View historical reports*, *View interaction records*, *Listen to call recordings and view chat transcripts*, and *Grade interactions*. For more information about role definition and assignment to users, see sections [Roles](#) and [Users](#) of the *ServicePattern Contact Center Administrator Guide*.

- To generate and view reports, from the menu on the left select the **Reports** option. See section [Report Generation](#) for more information.
- To search for interaction records, as well as to review and grade call recordings, chat transcripts and email

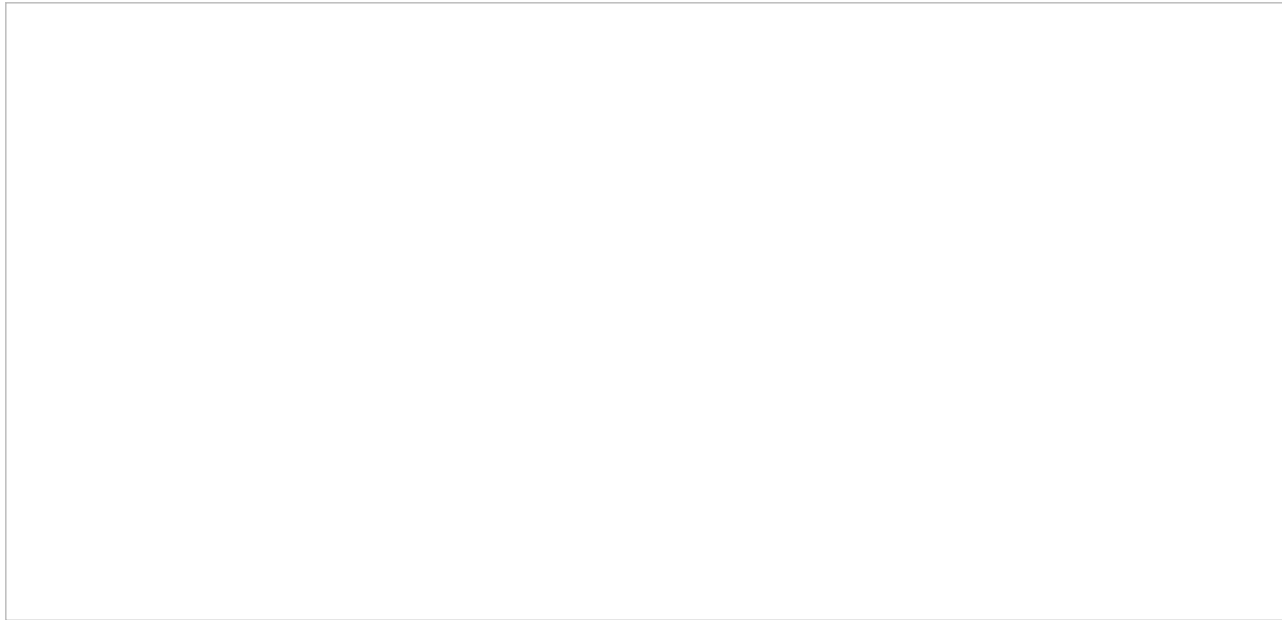
replies, from the menu on the left select the **Interaction Records** option. See section [Interaction Records Search](#) for more information.

- To search for agent activities and review corresponding screen recordings, from the menu on the left select the **Agent Timeline** option. See section [Agent Activity Search](#) for more information.

[< Previous](#) | [Next >](#)

Report Generation

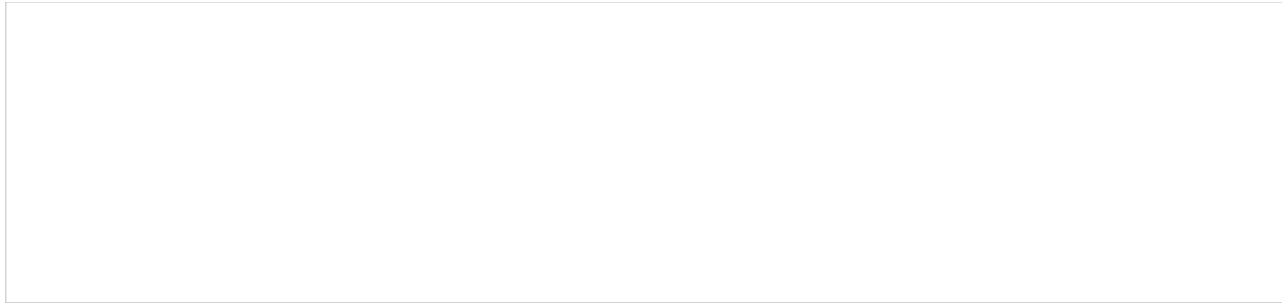
When you select option **Reports** from the menu on the left, the application pane will display the list of available reports. By default, these are the pre-defined reports supplied with ServicePattern. If you have previously created some custom reports using the JasperReports tool and uploaded their definitions into the system, such custom reports will also appear in the list of reports. For more information about stock and custom report definitions, see section [Report Templates](#) of the *ServicePattern Contact Center Administrator Guide*.



List of reports

The reports are grouped by the type of the contact center resources that they describe. Within each group, the reports are listed in alphabetical order according to the names of the corresponding report definitions. A description is provided for each report. If a description does not fit on the screen, hover over it to see the full text of the description in a tooltip box.

Select the desired type of report from the list. In the view that appears, use the report generation filters to select the resource for which you want to generate the report and to specify the reporting interval. Depending on the report type, you can select multiple resources and apply additional filters.



Report generation filters

Click the **Run** button to generate the report. Report generation may take a few moments. The report will appear in a separate browser tab/window and occupy the entire available browser window space. Thus you can have multiple reports open in your browser at the same time. Generated reports will continue to be available for viewing even when you close the Contact Center Administrator application.

Depending on the amount of data, the generated report may occupy more than one page. Use the page navigation links (**first**, **prev**, **next**, and **last**) to navigate through the contents of the report.

For descriptions of metrics provided by each report, see sections [Detail Reports](#) and [Aggregate Reports](#).

You can export the generated report in one of the following formats: PDF, XLS, CSV, TXT. To export the report, click the corresponding link.

To run the same report for a different resource and/or different reporting interval, simply change the filter setting and click the **Run** button again.

To return to the list of reports, click the **Back to the list of Reports** button.

Note that you can also schedule automatic generation of reports and their delivery to specified destinations as e-mail attachments or via FTP. For more information, see section [Scheduled Reports](#) of the *ServicePattern Contact Center Administrator Guide*.

[< Previous](#) | [Next >](#)

Interaction Records Search

When you select option **Interaction Records** from the menu on the left, the application pane will initially display a search page where you define media type(s) of the interactions you are looking for as well as other search criteria, such as time frame, participating agent(s), and/or service(s) involved.

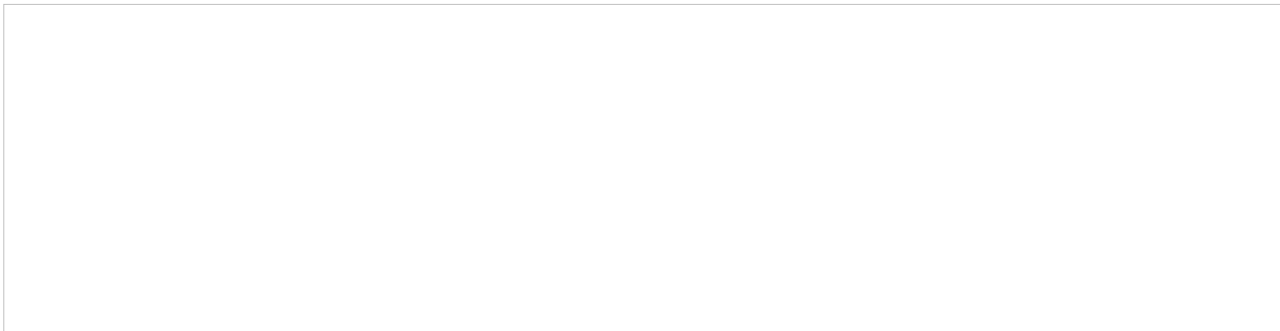
Your search criteria can have any number of conditions. To add a condition to your search, click **add condition**. To edit or delete an existing condition, use the mouse-over operation.



Interaction records search

You can save a set of search conditions for future use. To save a set of search conditions, click **Save** and assign a name to it. To use a previously saved set of search conditions, click **Load**, and select its name from the drop-down menu.

When all desired search conditions are specified, click the **Search** button. The *Search Results* page will open with the list of interaction records matching your search criteria. Each row of the displayed table describes a single interaction.



Search results

Note that an interaction may have multiple segments, e.g., in case when a call was handled by multiple agents. The number of segments in a call is shown in the *Segments* column. You can see details for each segment of a selected call by clicking that number.

Some columns show data that is media-type specific, e.g., *Case ID* is only relevant for emails. You can adjust the format of your table to only display the columns for the data that you need. To remove columns, hover over any column header, open the drop-down menu, and unselect the columns for the data you do not need.

You can download all records that appear in the Search Results page in the .csv format. To export the records, click the export button at the bottom of the page.

You can also manually download email content, call recordings and call progress analysis (CPA) recordings for the interactions shown in the Search Results page. Note that manual download is limited to up to 100 emails, 100 call recordings and 500 CPA recordings respectively. Periodic automated export of call/CPA recordings is configured via [Services and Campaigns > Results Tab](#) of the Contact Center Administrator application.

[< Previous](#) | [Next >](#)

List of Interaction Records Search Criteria

The table below describes the data elements that can be used as criteria for [interaction records search](#). The criteria are listed in the order in which they appear in the drop-down menu on the Interaction Records > Search page.

Criterion	Description
GIID	Returns interaction record(s) with the specified Global interaction identifier .
KB template used	Returns records of interactions where any Knowledge Base article were used. Applies to text based interactions only.
account number	Return call attempts made with respect to the calling list record that contains the specified value in the field of the <i>account number</i> type.
agent	Returns records of interactions handled by the agent with the specified username.
case ID	Returns records of email interactions associated with the specified case .
connected to	Returns records of calls answered at the specified phone number.
direction	Can be used to limit search to incoming, outgoing, or internal interactions only. Note that not all directions apply to all media types.
disposition	Returns records of interactions that were processed with the specified disposition.
duration	Returns records of interactions whose overall duration was greater than or less than the specified value.
ended after	Returns records of interactions whose processing ended after the specified date and time.
ended before	Return records of interactions whose processing ended before the specified the date and time.
first name	Returns records of interactions handled by agents with the specified first name.
from	Returns records of interactions originated from the specified address. For inbound calls, Caller ID. For outbound and internal calls, the extension from which the call was dialed. For chats, the IP address of the originating computer.
has call problem	Used to search for calls that were marked by agents as calls with quality problems . You can select a particular type of problem or set it to <i>any</i> to get all records with quality problems of any kind.

has recording	Returns records of calls that have voice recordings available for playback in the system. Does not include records of calls whose recording were deleted due to the data storage limits imposed by your service provider.
has screen recording	Returns records of calls that have screen recordings available for playback in the system. Does not include records of calls whose recording were deleted due to the data storage limits imposed by your service provider.
has voice signature	Returns records of calls during which a voice signature was collected from the customer. Includes records of calls whose recordings were deleted due to the data storage limits imposed by your service provider. Assuming that you had those recordings exported and stored externally, you can use details of such records (e.g., <i>GIID</i>) to look for those recording in your external storage.
in email subject	Returns records of all email interaction containing the specified text in their subject.
last name	Returns records of interactions handled by agents with the specified last name.
no KM template used	Returns records of interactions where no Knowledge Base articles were used. Applies to text based interactions only.
service	Returns records of interactions associated with the specified service.
specific KM template used	Returns records of interactions where the specified Knowledge Base article was used. Applies to text based interactions only.
started after	Returns records of interactions that were originated or received after the specified date and time.
ended before	Return records of interactions that were originated or received before the specified the date and time.
thread ID	Returns records of email interactions associated with the specified email thread .
to	Returns records of interactions sent to the specified original destination. For inbound calls, the number originally dialed by the caller. For chats, name of the mobile/web scenario entry .
was flagged	Returns records of interactions that were flagged .
was transferred	Returns records of interactions that were transferred.

[< Previous](#) | [Next >](#)

Global Interaction Identifier

Global interaction identifier (GIID) is a [UUID-formatted](#) number assigned to every interaction processed within ServicePattern. It can be used to track interaction history through all stages of processing within the system, including possible consultations, transfers, conferences, service changes, and media upgrades. At run-time, GIID can be exported to third-party applications via scenarios and/or desktop integration APIs. Historically, GIID appears in all records related to interaction processing, including call detailed records, outbound campaign results, voice recording file names, and activity history of pre-integrated CRM applications. GIID is available as a search criterion in the [interaction records search](#).

Depending on whether an interaction is new or related to another existing interaction, GIID is either generated or inherited. More specifically, the following general rules apply when assigning a GIID:

- For inbound voice and chat interactions, GIID is generated as soon as the interaction enters the contact center.
- For predictive, progressive and automatic (IVR) campaign calls, a new GIID is generated for every new call attempt (i.e., different call attempts related to the same calling record have different GIIDs).
- For preview campaigns, a new GIID is generated each time a preview record is distributed to an agent. When the agent makes a call based on a preview record, the call attempt inherits the GIID of the record. If an agent makes several call attempts while handling one preview record, all such call attempts will have the same GIID.
- Manual consultation calls, both outbound and internal, inherit GIID of the held primary call. If several calls are on hold, the consult call inherits GIID of the call that has been placed on hold most recently.
- For manual outbound and internal calls unrelated to any existing calls, GIID is generated as soon as the call is dialed.
- For new inbound email interactions, GIID is generated when the email enters the contact center.
- For new outbound email interactions (emails unrelated to any existing cases), GIID is generated as soon as a draft is created (agent clicks the *Compose* button).
- For follow-up emails initiated by customers, GIID is generated when the email enters the contact center.
- Follow-up emails initiated by agents inherit GIID of the previous email in the email thread.
- A call originated in the context of a customer chat interaction inherits GIID of the chat interaction.
- A call originated in the context of an email interaction inherits GIID of the email interaction.
- A new email originated in the context of a voice call inherits GIID of the call.
- Transferred/forwarded interactions inherit GIID assigned to the original interaction in a transfer sequence.
- Conference portions of interactions inherit GIID assigned to the original interaction.

A typical use of the GIID can be illustrated by the following example. When reviewing your CRM transactions, you need to find voice recordings of the related calls, both while they are still stored in the ServicePattern system and after they have been exported and stored elsewhere.

- When configuring your system to support the above task:
 - If you use one of the pre-integrated CRM applications, depending on your workflow the GIID related to transactions handled by your agents may be available automatically as part of the activity history (see below). If this is not the case, consider using one of the available scenario integration blocks (e.g., [Fetch URL](#)) to store the content of variable `$(globalInteractionId)` as part of CRM transaction records associated with your calls.
 - To make sure you can find voice recordings even after they have been exported out the system, add `$(GlobalInteractionId)` component to the [file names of exported recordings](#).
- When looking for a voice recording related to your CRM transaction:
 - Copy the GIID from the CRM transaction.
 - Check the transaction date against the voice recording storage times agreed upon with your service provider (the default period is 90 days).
 - If the voice recording is still stored within ServicePattern, open the Interaction Records Search page, select GIID as your search condition, and paste the GIID you have copied from your CRM transaction.
 - If the voice recording is no longer within ServicePattern but has been exported for off-line storage, look for the file containing the copied GIID on the location where the recordings are stored.

Note that depending on the workflow, you search may produce several voice recordings (e.g., recordings of call segments before and after a transfer, and recording of an associated consult call).

GIIDs are exposed via the following data elements:

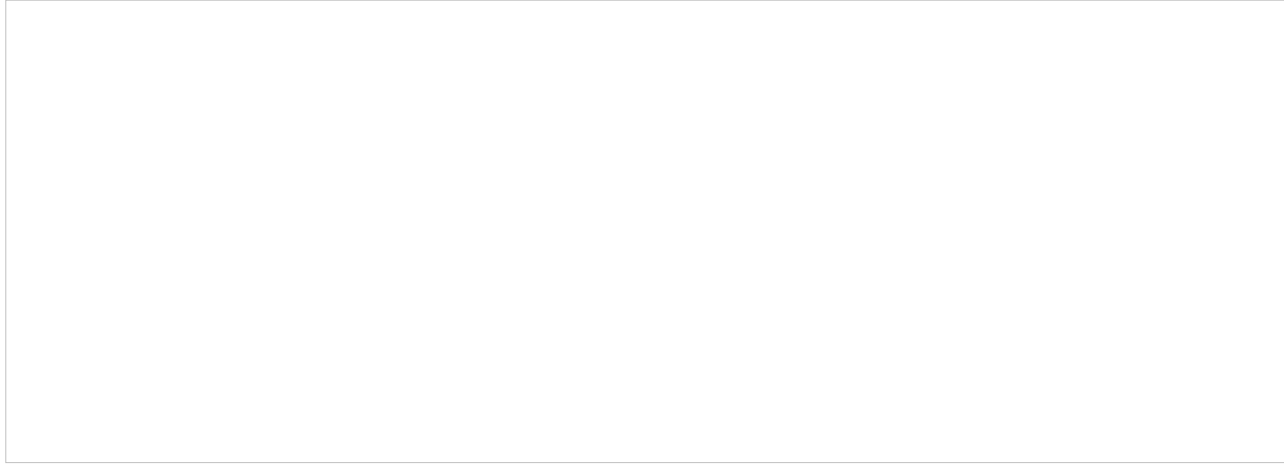
Scenarios	Interaction property variable <code>\$(item.globalInteractionId)</code>
Simplified Desktop .NET API	- Property <code>globalInteractionId</code> of events <code>evtCallDialing</code> and <code>evtCallOffered</code> - Optional parameter of <code>globalInteractionId</code> of method <code>CallDial</code>
Desktop integratoin API .NET Version	- Property <code>globalInteractionId</code> of event itemArrivedCallback - Optional parameter <code>globalInteractionId</code> of method makeCall
Salesforce.com integration	Field <i>Call Object Identifier</i> of Salesforce.com activity history .
Zendesk integration	URL <code>https://<portal>/InteractionSearch?global_interaction_id=<x></code> of Zendesk activity history . Clicking this URL opens the Interaction Records Search page with the global interaction identifier preset as a search condition.
RightNow integration	Field <code>global_interaction_id</code> of RightNow activity history .
Reporting Database	Field <code>global_interaction_id</code> of table call_detail .
Detail Reports	Field <i>Global ID</i> of the Call Detail Report and Email Detail Report .
Campaign Results	Field <i>Global Interaction ID</i> of the campaign results in detailed and simple formats.
Exported voice recording	- Optional file name component <code>\$(globalInteractionId)</code> of exported voice recording files. - Field <i>Global Interaction ID</i> of the recordings details csv file.

Note the following:

- When two inbound calls are merged into a conference, the conference call gets GIID of the older call (the call that appeared in the system first).
- Consult calls initiated from a [hardphone](#) do not inherit GIID from the original call.
- GIID is not currently available as a scenario variable for the following types of interactions (because interactions of these types do not have exposed scenarios):
 - Preview campaign calls
 - Manual outbound and internal calls
 - Emails

Agent Activity Search

When you select option **Agent Timeline** from the menu on the left, you will see a set of search filters where you select an agent and set a desired time frame. Click the **Search** button.



Agent activity search

The search results pane will display all states within all working sessions of the selected agent that fit in the specified time frame. States will be represented by the same icons [that are used in the Agent Desktop application](#). For each state, information about its start time, end time, and duration will be provided. For interaction-handling states (*Busy* and *After-Call Work*), media type of the handled interaction will be displayed.

For agent sessions where screen recording was used, a screen recording icon  will be displayed for all states within those sessions. See section [Screen Recordings](#) for more information.

[< Previous](#) | [Next >](#)

General Information About Quality Management

In contact centers, quality management usually refers to assessment of the quality of agent work via reviewing the available call and screen recordings, chat transcripts, and email messages. In ServicePattern, the results of such reviews can be expressed using a number of customizable [grading categories](#), such as politeness and knowledge.

To review call recordings, chat transcripts, or email messages, first select the desired interactions as described in section [Interaction Records Search](#). The search conditions depend on your quality management practices. For example, if quality monitoring is based on random checks of agent recordings or transcripts, it is usually sufficient to define agent's username and the desired time frame as your search conditions. If, on the other hand, you follow-up on a specific customer complaint, your search conditions may contain customer's phone number, service name, and the time frame.

When all desired search conditions are specified, click the **Search** button. The *Search Results* page will open with the list of interaction records matching your search criteria. If a particular interaction has been previously reviewed and rated, the user name will appear in the *Reviewed by* column.

For phone calls, availability of a recording for a particular call will be indicated by the audio icon  in the *Recording* column. Percentage of recorded calls is specified in your [contact center configuration](#) and can be re-defined for each [service](#) and each [individual agent](#) separately. If not all calls in your contact center are recorded, you can use filter *has recording* to limit your search results to call records that actually have recordings.

For chat interactions, availability of a chat transcript is indicated by the messaging icon  in the *Recording* column. ServicePattern unconditionally records transcripts for all chat service interactions and stores them for the same amount of time as the corresponding interaction records themselves. Therefore, you do not need to use any special filters to get access to chat interactions with transcripts.

[< Previous](#) | [Next >](#)

Call Recordings

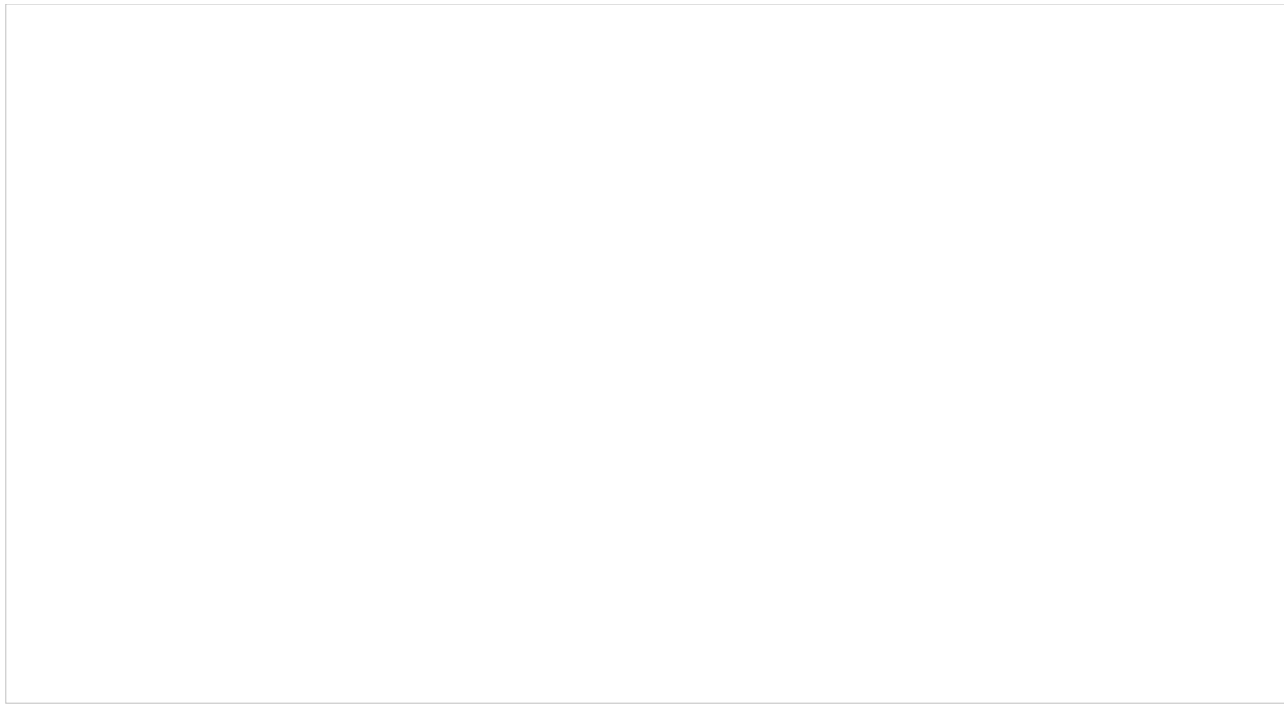
To listen to a call recording, click the audio icon  for the corresponding interaction record. The *Review Call Recording* page will open with standard audio controls.

Note: Depending on the type of media player used, the audio controls may appear only when you hover over the *Conversation recording* area. When using *Review Call Recording* function for the first time in your browser, you may need to install the media player plug-in (extension). Also, depending on the internet security settings of your browser application, you may need to explicitly confirm your permission to use the media player on this page.

If the agent entered a disposition or provided any free-form notes for this call they will be displayed on this page as well.

Click the play button to listen to the recording.

If any categories for agent performance evaluation have been defined in your contact center configuration, you can grade the agent performance during the selected call on a scale of one to nine in any of those categories. You can also enter some free-form comments about this call recording.



Recording playback and grading

Click the **Rate** button to save the data you have entered. Your grades and comments for this call recording will be stored and made available to other users who may subsequently review this call record.

Note that the same call recording is provided for all call segments, but you can grade performance of each agent who handled the call separately. Use the **next** and **previous** buttons to navigate between segments. Absence of any call grading categories on the *Review Call Recording* page for a particular call segment means that during that segment the call was connected to an IVR application.

To download the grades, reviewer's notes, and the recording to your computer, click **Save As**.

To share a link to the call recording with other reviewers, click **Copy link to share**. The link to this page will be copied to the clipboard. You can then paste this link to an email or text message to other people in your organization. Note that in order to access the recording these people must have [privilege Listen to call recordings and chat transcripts](#).

[< Previous](#) | [Next >](#)

Chat Transcripts

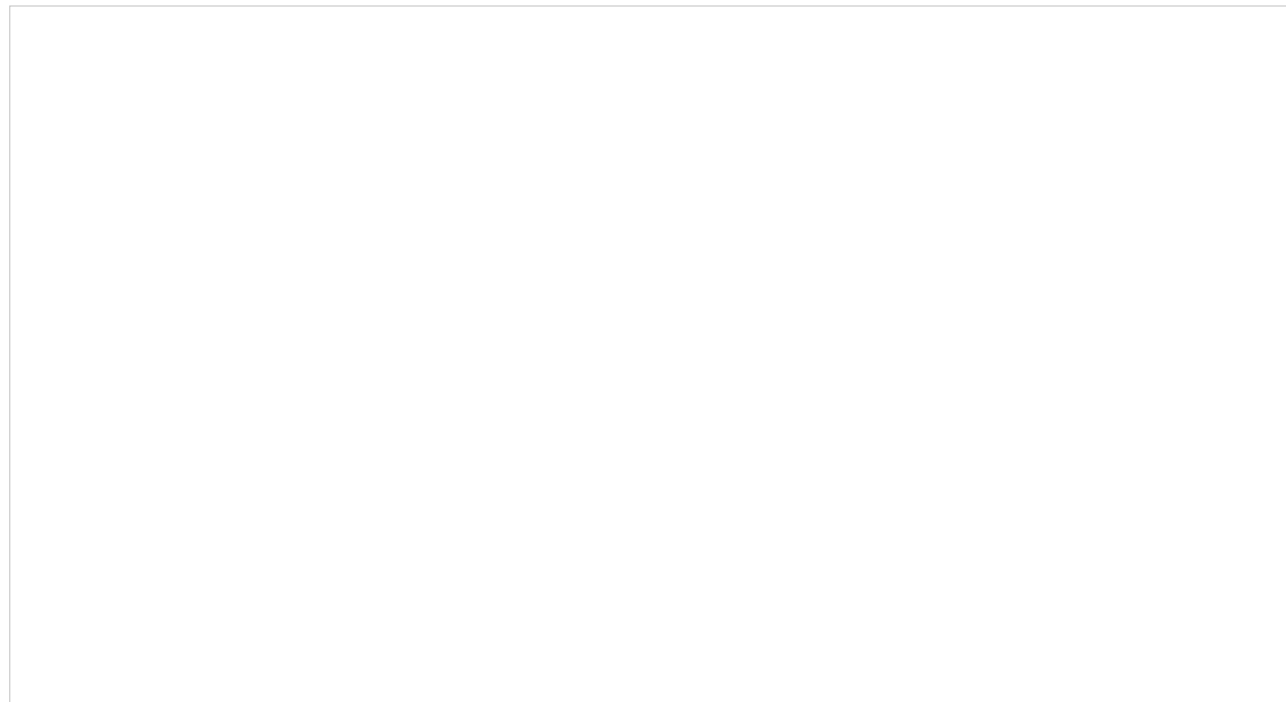
To view chat transcripts, you must search the interaction records available in **Reports** (make sure you are not still in **Configuration**).

- Navigate to **Reports > Interaction Records > Search**.
- Click the box for **Chat**, and specify the date range for the transcripts you wish to view.
- Click the check mark to apply your changes.
- Click the **Search** icon .

[Search interaction records to view chat transcripts](#)

To review a chat transcript, click the messaging icon  for the corresponding interaction record. The *Review Chat Transcript* page will open with a complete chat transcript and grade controls.

If any categories for agent performance evaluation have been defined in your contact center configuration, you can grade the agent performance during the selected chat interaction on a scale of one to ten in any of those categories. You can also enter some free-form comments about this transcript.



Chat transcript review and grading

Click the **Rate** button to save the data you have entered. Your grades and comments for this chat interaction will be stored and available to other users who may subsequently review this call record.

Note that the same transcript is provided for all chat segments, but you can grade performance of each agent who handled the chat separately. Use the **next** and **previous** buttons to navigate between segments.

Exporting Chat Transcripts

To download the grades, reviewer's notes, and the transcript to your computer, click the **Save as** icon .

[Click "Save as" to export a chat transcript](#)

To share a link to the chat transcript with other reviewers, click the **Copy link to share** icon . The link to this page will be copied to the clipboard. You can then paste this link to an email or text message to other people in your organization. Note that in order to access the transcript, these people must have the [privilege Listen to call recordings and chat transcripts](#).

Emailing Chat Transcripts to Customers

Starting with version 13.3, a chat scenario can be configured to email a "human-readable" chat transcript to a customer. This capability extends the usefulness of chat transcripts beyond the reach of administrators working in the Contact Center Administrator, directly to the customer, by giving the customer the means to request an email copy of the transcript when the conversation is over. This functionality is set up and managed in the Scenario Builder using the variables `$(item.transcript.text)` and `$(item.transcript.html)`.

How to Set up the Chat Scenario

In this example, the chat scenario will include the following actions:

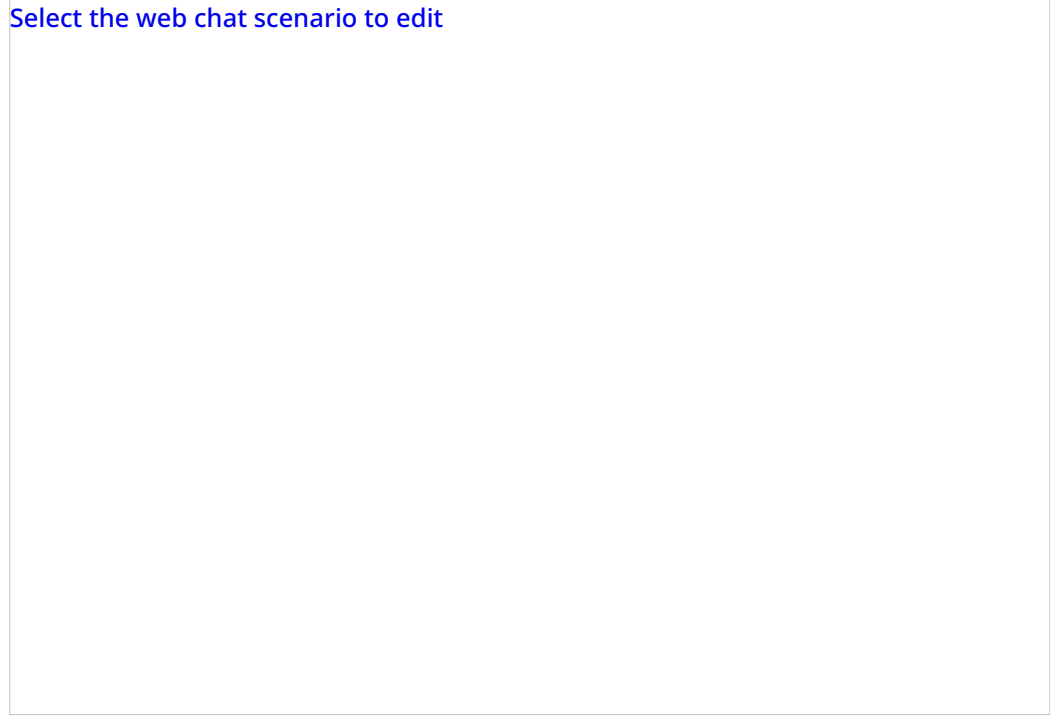
- The customer initiates a chat.
- The **Request input** form asks the customer to provide last name, first name, full name, email address and the message to the company.
- **Find Agent** is deployed. If the agent accepts the chat, Connect Chat is enabled and the conversation begins.
- The conversation ends and **Mobile Chat Survey** is deployed. In this survey, the customer is asked to provide an email address if the customer wants a copy of the chat transcript to be emailed.
- The chat window closes.

Set up your chat scenario exactly as in the steps that follow.

Step 1

Navigate to **Configuration > Scenarios > Chat** and select the web chat scenario you wish to edit. If you do not already have a web chat scenario set up, you should create one or use a template to create one. Note that a web chat scenario is not the same as a mobile chat scenario.

Select the web chat scenario to edit



Step 2

Click the **Edit** icon  to edit the scenario in the Scenario Builder. The Scenario Builder will open in a separate tab or window, and your Web Chat Template scenario will appear. You should make your scenario match the scenario shown.

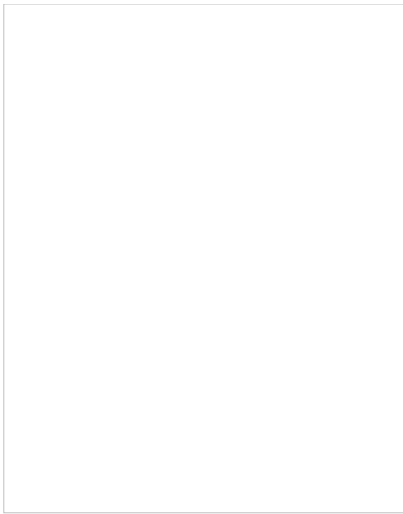
Setting up the web chat scenario

Step 3

Notice that the scenario begins with a **Request input** block that asks the customer fill out a form with first name, last name, and first name plus last name. These fields are included on the form using three **Set Variable** blocks. Drag each **Set Variable** block onto the scenario and place them all underneath the **Request Input** block.

Add Variable blocks to the Request Input block

When the customer initiates a chat, the customer will see the form in the chat window.



Step 4

Set the variable properties on the right panel of the screen, filling in the fields for **Variable name** and **Value**.

The properties should be set as follows:

Variable name	Value	Description
item.lastName	\$(item.externalChatData.last_name)	customer's last name
item.firstName	\$(item.externalChatData.first_name)	customer's first name
item.fullName	\$(item.externalChatData.first_name) \$(item.externalChatData.last_name)	customer's full name

Fill in the Variable name and Value

Step 5

Drag two more **Set Variable** blocks onto the scenario underneath the last **Request input** block.

The properties should be set as follows:

Variable name	Value	Description
item.sendTranscript 1		The functionality to send the chat transcript is turned on.
item.email	\$(item.externalChatData.email)	customer's email address

Note that **\$(item.sendTranscript)** value must be set to 1 in the scenario for the chat transcript to be sent. If you set the value to zero or you leave it blank, the transcript will not be sent. Furthermore, the customer must provide an email address for the transcript to be sent.

The second set of Variable blocks



Save your changes. Close the **Scenario Builder** window or tab.

Step 6

Make sure your email settings are configured properly and that an SMTP server is specified. Navigate to **Call Center Configuration >> Email Settings >> SMTP Server**. Then enter the server properties in the fields shown.

Specify a server in SMTP configuration settings

Step 7

Make sure your **Chat Transcript Template** is defined. If you do not already have one, create one. Navigate to **Call Center Configuration >> Email Settings >> Chat Transcript Template**.

A chat transcript template is the standard email that will be sent to the customer. The variables on the template are automatically populated with the customer's information (from the **Request Input** form in the scenario), your company's information (i.e., your name), and the contents of the chat transcript. You may edit the appearance of such a friendly message in any way you like. An example chat transcript template is shown.

Chat transcript template properties

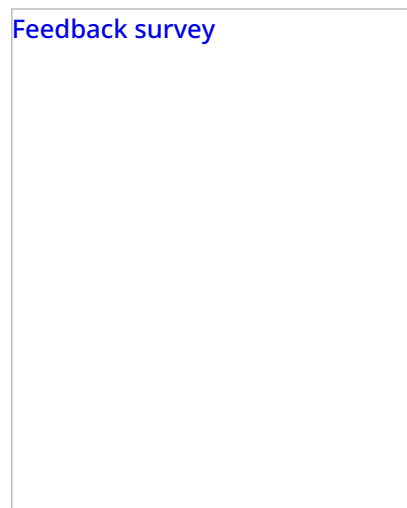
Fill in the following fields:

- Sender display name (your name/your organization's name)
- Sender email address (your email address--whoever is sending the email)
- Subject (email subject line)
- Message (friendly message that includes the chat transcript)

If you set up your chat transcripts exactly like this, your customer will have the option to receive a copy of the chat transcript.

What the Customer Sees

At the end of the conversation, a feedback survey will be given to the customer to complete. This survey action item was placed in the chat scenario as a **Request Input** block. The customer will see the survey as shown.



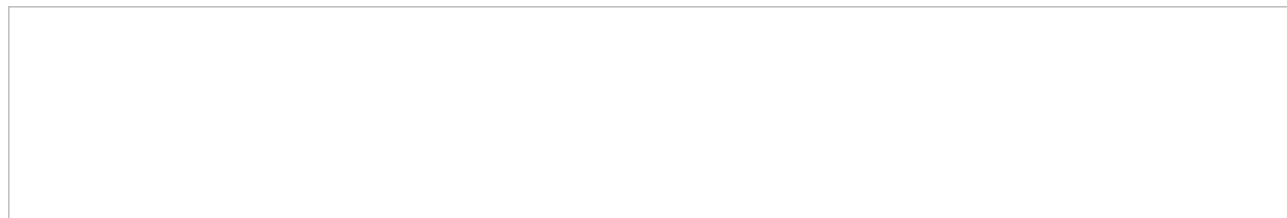
The customer completes the feedback survey and receives the chat transcript via email. An example of the email message is shown.

The chat transcript emailed to the customer

[< Previous](#) | [Next >](#)

Email Messages

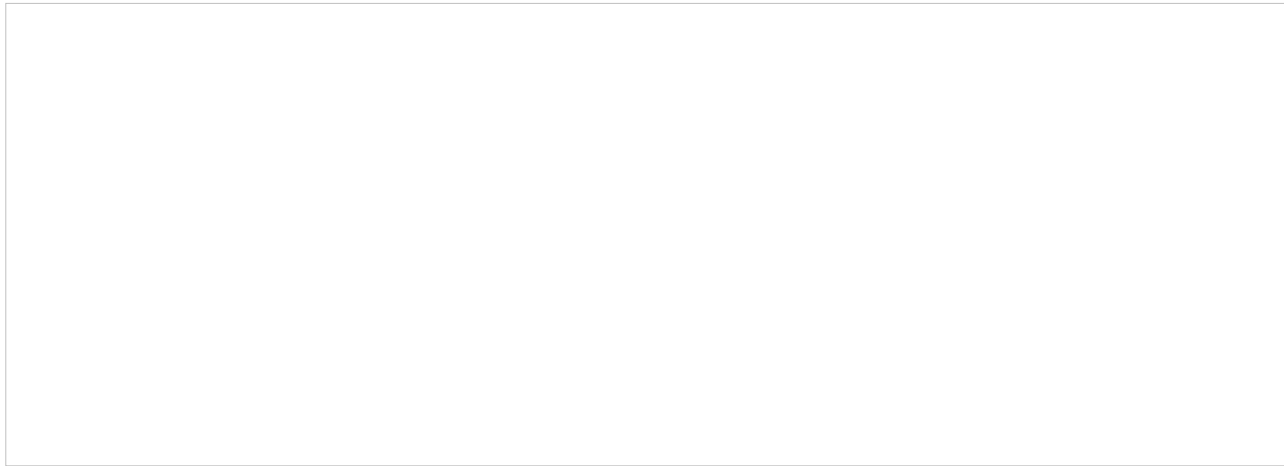
To review an email case, click the case number for the corresponding interaction record. The *Case History* page will open where all incoming ☐, transferred ☐, and outgoing ☐ emails related to this case will be listed in the chronological order. Any closing dispositions and notes that agents provided with respect to this case will also be listed with the notes icon ☐. To preview content of each email, hover over the *Text* column.



Case history

Double-click the message that you wish to review. The *Review Email* page will open.

If any categories for agent performance evaluation have been defined in your contact center configuration, you can grade the quality of agent's message on a scale of one to ten in any of those categories. You can also enter some free-form comments about this email message.



Email review and grading

Click the **Rate** button to save the data you have entered. Your grades and comments for this email interaction will be stored and available to other users who may subsequently review this call record.

Note that you can grade performance of each agent who handled this case. Use the **next** and **previous** buttons to navigate between emails related to this case. Customer's email messages cannot be graded.

To download the grades and reviewer's notes, click **Save As**.

If you would like to review the details of the header of an incoming email, navigate to the desired incoming message and click the **download original** link.

To share a link to this email case with other reviewers, click **Copy link to share**. The link to this page will be copied to the clipboard. You can then paste this link to an email or text message to other people in your organization. Note that in order to access the case via the Contact Center Administrator application, these people must have [privilege](#) *Listen to call recordings and chat transcripts*.

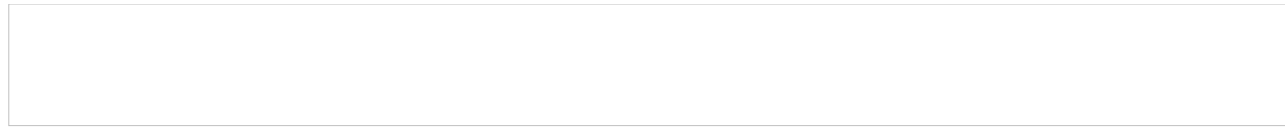
[< Previous](#) | [Next >](#)

Screen Recordings

Your system may be [configured](#) to capture videos of desktop screens of some agents during their working sessions. For viewing of any part of an agent session recording, use the [Agent Timeline view](#).

If a screen recording is available for an agent session that you see in Agent Timeline view, you can click the screen recording icon  corresponding to a particular agent state. A new window will open showing you a video of the agent's screen recorded during the selected state. To download the recording, click the download icon .

When an agent whose session is recorded handles an interaction, a screen recording related to handling of that interaction will also be available via the [Interaction Records view](#).



Interaction records with screen recordings

To view an interaction screen recording, click the screen recording icon . The Review screen will open. Select the desired interaction segment and click the **Watch** button. To download the recording, click the **Download** button.

Note: A new window opens each time you select a screen recording to play. Depending on the internet security settings of your browser application, you may need to explicitly allow pop-ups from the corresponding Contact Center Administrator application pages.

[< Previous](#) | [Next >](#)

General Information About Detail Reports

This section describes the reports that contain detailed records for agent activities and contact center interactions. These reports are available out-of-the-box reports with the ServicePattern contact center solution.

Despite telephony-oriented names of some parameters (Talk time, Hold time, External number), these reports provide data for interactions of various media types. For the correct interpretation of the parameter with respect to a particular media type, refer to the parameter description. Where the distinction between media types exist, the description refers to specific media types using terms *calls*, *chats*, and *emails*. Where the described parameter has the same meaning for all supported media types, the generic term *interaction* is used.

Note: All durations in detail reports are calculated by subtracting the number of full calendar seconds in the start time from the same number in the end time (i.e., milliseconds are disregarded). Consider these examples:

- A call that was answered at 11:00:00:005 and released at 11:00:00:998 will have talk time of 0 seconds (00:00:00) in reports.
- A call that was answered at 11:00:00:995 and released at 11:00:01:005 will have talk time of 1 second (00:00:01) in reports.

[< Previous](#) | [Next >](#)

Agent Activity Report

This report provides detailed records of activities of selected agents in chronological order.

Metric Name	Description
-------------	-------------

Time	Time when the activity started. Only the activities that started within the selected reporting interval will be shown.
Activity	Activity type. Can be one of the following: • <i>Ready</i> • <i>Not Ready</i> • <i>Inbound</i> • <i>Outbound</i> • <i>Conference</i>
Duration	Time spent in this activity. For interaction processing activities, includes both in-focus and out-of-focus time, as well as ACW time.
Detail	For the Outbound activity, displays the extension of the called party if the call was made internally and was answered. For the Inbound activity, displays remote party's the Caller ID for calls, IP address for chats, and email address for emails. For the Not Ready activity, displays the reason for being Not Ready if one is specified (otherwise, generic <i>Not Ready</i>).
Talk Time	Displayed for interaction-handling activities only. For calls, total time the agent spent talking during this activity. Excludes the hold times. For emails and chats, total time that the agent had the interaction in focus during this activity.
Hold Time	Displayed for interaction-handling activities only. For calls, total time the agent had the call on hold during the activity. For emails and chats, total time that the agent had the interaction out of focus during this activity.
Service	For an interaction-handling activity, displays the name of the service associated with this interaction.
External Number	For an <i>Inbound</i> activity, displays the originally dialed number or original destination email address. For an <i>Outbound</i> activity, displays the caller ID or the content of the From field of the email when it left the system.

Disposition	For interaction-handling activity, provides information about how the activity ended. Can be one of the following: • <i>Caller Terminated</i>: inbound call/chat terminated by the customer • <i>Callee Terminated</i>: outbound call/chat terminated by the customer • <i>Agent Disconnected</i>: call/chat terminated by the agent • <i>Rejected</i>: interaction rejected by the agent • <i>No Answer</i>: interaction not accepted by the agent • <i>Busy</i>: outbound call did not complete because the destination was busy or did not answer within a timeout • <i>Network Failure</i>: outbound call did not complete because of the network congestion • <i>System Disconnected</i>: call/chat was disconnected by the system • <i>Abandoned</i>: outbound call terminated by the agent before it was answered • <i>Transferred</i>: remote party on the interaction changed due to a transfer (the after-transfer phase will be shown as a subsequent activity) • <i>Terminated by Transfer</i>: agent transferred the interaction • <i>Conferenced</i>: call/chat became a conference (the conference phase will be shown as a subsequent activity) • <i>Replied</i>: inbound email replied by the agent • <i>Closed</i>: inbound email closed without reply by the agent • <i>Service Changed</i>: email re-categorized by the agent (service associated with the email was changed and the same agent continued processing it; subsequent email processing will be shown as a separate activity) • <i>Sent</i>: outbound email was sent by the agent • <i>Discarded</i>: outbound email was discarded without being sent by the agent • <i>Saved</i>: email was saved as a draft in the agent's personal queue
Agent disposition	For an interaction-handling activity, displays the disposition assigned to the call by this agent.
Media type	For an interaction-handling activity, displays the interaction media type.
Case	For an interaction-handling activity, displays the identifier of the case that this interaction is related to. Currently applies to email interactions only.

[< Previous](#) | [Next >](#)

Call Detail Report

This report provides detailed records of interactions in chronological order. A combination of filters *From Phone*, *Original Destination Phone*, and *Connected To Phone* allows you to request this report for interactions originated from specific phone numbers, made to specific service numbers, and connected to specific phone numbers. .

Note: This report provides records for voice and chat interactions only. Email interaction records appear in the [Email Detail Report](#).

Metric Name	Description
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Date	For inbound interactions, the date when the interaction entered the system. For internal and outbound calls, the date when the call was initiated.
Time	For inbound interactions, the time when the interaction entered the system. For internal and outbound calls, the time when the call was initiated.
Type	Call type. Can be one of the following: • <i>Inbound</i> • <i>Inbound Chat</i> • <i>Outbound</i> • <i>Internal</i> • <i>External</i> (a call where all parties are external)
IVR	The amount of time that this call spent in IVR.
Queue time	The amount of time that this interaction spent in the service queue.
Dialing/Ringing	For inbound calls, duration of call ringing phase from the moment the call was distributed to an extension and until it was either answered or abandoned. For internal and outbound calls, duration of call dialing phase from the moment the dialed number was received by the system and until the call was either answered or abandoned.
Talk	Total call talk time. Excludes hold time. For chats, total in-focus time (the time the interaction was selected in the active communications lists of the agents who processed it.)
Hold	Total time the call spent on hold. For chats, total out-of-focus time (the time the interaction spent at the agents' desktops excluding the <i>Talk</i> time.)
Wrap-up time	The amount of time the agents spent doing after-call work related to this interaction.
Duration	For calls and chats, total duration of the interaction from the moment it entered the system or was initiated and until it was released. Note that transferred interactions produce multiple records in this report, where the first record shows Duration as an empty string and the last record shows the total interaction duration.
From	The address from which the interaction was originated. For inbound calls, Caller ID. For outbound and internal calls, the extension from which the call was dialed. For chats, the IP address of the originating computer.
Original Destination	The original destination of the interaction. For inbound calls, the number originally dialed by the caller. For chats, name of the Mobile/Web scenario entry.
Connected to	Name (if known) of the party that answered the call/chat.
Connected to #	For calls, phone number of the destination where the call was answered.
Scenario	Name of the first scenario that was used to process this interaction.
Service/Campaign	Name of the service or campaign associated with this interaction. If the interaction was re-categorized or transferred to a different service, each such event will produce a new record with a new service name.
Transferred from	In case this interaction originated by way of transfer, the extension that this interaction was transferred from.
Agent Disposition	Disposition assigned to this interaction by the agent.

Notes	Free-text notes provided by the agent for this interaction.
Disposition	Provides information about how the interaction ended. Can be one of the following: • <i>Caller Terminated</i>: call/chat terminated by the calling party (after the call was answered) • <i>Callee Terminated</i>: call/chat terminated by the called party • <i>Rejected/Busy</i>: outbound call did not complete because the destination was busy or did not answer within a timeout • <i>Network Busy</i>: outbound call did not complete because of the network congestion • <i>System Disconnected</i>: call/chat was disconnected by the system • <i>Abandoned in IVR</i>: call terminated by the caller while in the IVR application • <i>Abandoned in queue</i>: call/chat terminated by the caller while waiting in queue; to distinguish normal abandoned calls from short-abandoned, use field <i>In SL</i> below • <i>Abandoned ringing</i>: call/chat terminated by the caller after it was distributed to an agent and before it was answered (or before the No Answer timeout expired) • <i>No Answer</i>: call/chat terminated while ringing after No Answer time-out expired (i.e., without being routed anywhere else) • <i>Transferred by XXXX</i>: interaction was transferred to another party by extension XXXX • <i>Continued</i>: participation of the From party on this call/chat, being part of a conference, ended, but the interaction between the remaining participants of the conference continued (such call will be shown as a subsequent record) • <i>Self Service</i>: processing of the call was finished by the IVR application and the requested service was provided (as indicated by execution of scenario block <i>Self-Service Provided</i>)
Media type	Interaction media type. Can be either VOICE or CHAT.
In SL	Indicates whether this interaction was answered within the service level threshold configured for the associated service. Possible values: <i>Yes</i>, <i>No</i>, and empty string. Note that this field will also be set to <i>Yes</i> for short-abandoned calls. Such calls will have the <i>Disposition</i> field set to <i>Abandoned in queue</i>.
Global ID	Global interaction identifier .

[< Previous](#) | [Next >](#)

Email Detail Report

This report provides detailed records of emails in chronological order. A combination of filters *From*, *To*, and *Connected To* allows you to request this report for emails that originated from a specific email address, were sent to a specific email address, and were handled by a specific agent.

Metric Name	Description
Date	For inbound emails, the date when the interaction entered the system. For outbound emails, the date when the outbound email was sent.
Time	For inbound emails, the time when the interaction entered the system. For outbound emails, the time when the outbound email was sent.

Type	Email type. Can be one of the following: • <i>Inbound</i> • <i>Outbound</i>
From	Email address in the From field.
Original Destination	Email address used as the destination address by the original sender.
Connected to	For inbound emails, name of the party that received the email.
Service/Campaign	Name of the service associated with this email. If the interaction was re-categorized or transferred to a different service, each such event will produce a new record with the new service name.
Transferred from	In case this email originated by way of transfer, the agent that this email was transferred from.
Agent disposition	Disposition assigned to this interaction by the agent.
Action	Provides information about how the interaction ended. Can be one of the following: • <i>Replied</i>: inbound email was replied to • <i>Closed</i>: inbound email was closed without reply • <i>Service Changed</i>: email was re-categorized (service associated with the email was changed and the same agent continued processing it; subsequent email processing will be shown as a separate record) • <i>Sent</i>: outbound email was sent • <i>Discarded</i>: outbound email was discarded without being sent
Queue time	The amount of time that an inbound email spent in the service queue.
In Focus	Total in-focus time (the time the interaction was selected in the active communications lists of the agents who processed it.)
Out of Focus	Total out-of-focus time (the time the interaction spent at the agents' desktops excluding the <i>Talk</i> time.)
Handle time	For inbound emails, time between the moment the email entered the system and the moment when the first meaningful response was sent (or the email was closed or transferred externally). For outbound emails, time between the moment the email was initiated by the agent and the moment the email was sent. Note that transferred and re-categorized emails produce multiple records in this report, where the first record shows Handle time as empty string and the last record shows the total interaction duration. Note also that duration always shows calendar time (total time between the specified moments) regardless of hours of operation of the associated service. E.g., if an email was received at 4 pm and replied the next day at 10 am, the duration will show 18 hours, even if the call center was closed during the night time.
Wrap-up time	The amount of time the agents spent doing after-call work related to this email.

Case ID	Identifier of the case that this interaction is related to.
Thread ID	Identifier of the email thread.
Subject	Content of the email subject.
In SL	Indicates whether this email was replied within the service level threshold configured for the associated service . Possible values: <i>Yes</i> , <i>No</i> , and empty string. Empty string is used if no service level is configured for the given service and when the result of email processing was anything other than reply. Note that service level calculation excludes the hours outside of the HOP configured for the associated email service.
Global ID	Global interaction identifier .

[< Previous](#) | [Next >](#)

General Information About Aggregate Reports

This section describes the reports that contain key performance indicators for the main contact center resources such as agents, agent teams, services, and scenarios. These reports are available out-of-the-box with the ServicePattern contact center solution.

Note that, unless noted otherwise with respect to a particular metric, all call-related metrics count inbound calls for the aggregation interval in which they entered the system. (E.g., if a call entered the system in interval A and was answered in interval B, the service metric *Answered* will count it for interval A and not for interval B.) Likewise, all internal and outbound calls are counted for the aggregation interval in which they were initiated.

Note also that all call-related metrics are also supported for the chat media type. Thus, for services that use media type chat, the term *call* in the description of any metric shall be interpreted as a chat interaction in the same context.

[< Previous](#) | [Next >](#)

Agent Performance Report

This report shows changes over time of key performance indicators for a selected agent.

All interaction-related metrics in this report are calculated for call and chat media types. For agents' email metrics, use the [Agent Email Report](#).

Metric Name	Description
Occupancy %	Percent to time the agent spent handling calls, including after call work, relative to total working time (i.e., handling calls and being Ready to handle calls).
Number of Calls Handled	Number of inbound calls handled by the agent.

Average Handling Time (inbound)	Average time, including after call work and hold times, the agent handled the inbound calls.
Number of Calls Made	Number of outbound calls handled by this agent. Includes campaign calls.
Average Handling Time (outbound)	Average time, including after call work and hold times, the agent handled the outbound calls. Includes campaign calls.
Total Logon Time	Total time the agent was logged on during the reporting interval.
Total Working Time	Total time the agent was either handling calls, including after call work, or was ready to handle calls.
Call Rejects / No Answer	Number of calls that the agent rejected and/or did not answer.
Initiated Transfers	Number of calls that the agent transferred.
Number of Surveys	Number of surveys available for calls handled by the agent during the reporting interval.
First Call Resolution %	Percent of surveys that indicated first call resolution relative to total number of surveys available for calls handled by the agent during the reporting interval.
Contact Satisfaction	Average of contact satisfaction marks from all surveys available for calls handled by the agent during the reporting interval.
Net Promoter Score	Net Promoter Score (NPS) based on the results of surveys available for calls handled by the agent during the reporting interval. For more information about NPS, see http://www.netpromoter.com/why-net-promoter/know/
Ready %	Percent of time the agent was ready relative to total logon time.
Busy (Inbound) %	Percent of time the agent was engaged in inbound calls relative to total logon time. Includes hold times. Does not include ringing time or after call work time.
Busy (Outbound) %	Percent of time the agent was engaged in outbound calls, including campaign calls, relative to total logon time. Includes dialing time and hold times. Does not include after call work time.
Average Ringing Time	Average time the agent's phone was ringing before calls were answered, abandoned, rejected or timed out due to no answer. Also includes dialing time for non-campaign outbound calls.
After Call Work %	Percent of time that the agent spent doing after call work relative to total logon time.

[< Previous](#) | [Next >](#)

Agent Time Allocation Report

This report shows how much time agents of selected teams spent in various activities relative to the total logon time within the reporting interval.

This report applies to agents handling interactions of all supported media types. Note, however, that this report does not take into account the [Omni-Channel Routing capacity configuration](#) for media-blended environments. All metrics in this report are based on the traditional agent state model where the agent is deemed *Ready* as long as he does not handle any interactions at all, and becomes *100% Busy* as soon as he begins handling an interaction of any media type. For more information about the traditional agent state model, see section [Understanding and Handling Your States](#) of the *ServicePattern Agent Guide*.

Metric Name	Description
Total Logon Time	Total time the agent was logged on during the reporting interval.
Total Working Time	Total time the agent was either handling calls, including after call work, and ready to handle calls.
Occupancy %	Percent to time the agent spent handling calls, including after call work, relative to total working time (i.e., handling calls and being ready to handle calls).
Busy (Inbound) %	Percent of time the agent was engaged in inbound calls relative to total logon time. Includes hold times. Does not include ringing time or after call work time.
Busy (Outbound) %	Percent of time the agent was engaged in outbound calls, including campaign calls, relative to total logon time. Includes dialing time and hold times. Does not include after call work time.
Average Ringing Time	Average time the agent's phone was ringing before calls were answered, abandoned, rejected or timed out due to no answer. Also includes dialing time for non-campaign outbound calls.
After Call Work %	Percent of time that the agent spent doing after call work relative to total logon time.
Ready %	Percent of time the agent was ready relative to total logon time.
All NR %	Percent of time that the agent was not ready for any reason relative to total logon time.
Lunch NR %	Percent of time that the agent was not ready for reason Lunch relative to total logon time.
No answer NR %	Percent of time that the agent was in the forced not ready state after failing to answer an alerting service call relative to total logon time.

[< Previous](#) | [Next >](#)

Intra-Team by Service Report

This report provides service-call-handling metrics for selected agent(s) of selected teams. Call related to specific services are reported separately. Only the services associated with the selected teams are included. Direct calls, including transfers, are reported separately in the last section of the report.

All interaction-related metrics in this report are calculated for call and chat media types. For agents' email metrics, use the [Agent Email Report](#).

Metric Name	Description
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Number of Calls Handled	Total number of inbound calls to the given service handled by the agent.
Average Handling Time (Inbound)	Average handling time, including after call work, for the inbound calls to the given service.
Number of Calls Made	Total number of outbound calls associated with the given service handled by the agent.
Average Handling Time (Outbound)	Average handling time, including after call work, for the outbound calls associated with the given service.
Number of Surveys	Number of surveys available for calls to the given service handled by the agent.
First Call Resolution %	Percent of surveys that indicated first call resolution relative to total number of surveys available for calls to the given service handled by the agent.
Contact Satisfaction	Average of contact satisfaction marks from all surveys available for calls to the given service handled by the agent.
Net Promoter Score	Net Promoter Score (NPS) based on the results of surveys available for calls to the given service handled by the agent. For more information about NPS, see http://www.netpromoter.com/why-net-promoter/know/
Agent Abandons	Number of inbound calls to the given service that the agent answered and terminated within 10 seconds.
Call Rejects / No Answer	Number of inbound calls to the given service that the agent rejected and/or did not answer.
Initiated Transfers	Number of calls to the given service that the agent transferred.

[< Previous](#) | [Next >](#)

Intra-Team Performance Report

This report provides general performance metrics for selected agents of selected teams.

All interaction-related metrics in this report are calculated for call and chat media types. For agents' email metrics, use the [Agent Email Report](#).

Metric Name	Description
Occupancy %	Percent to time the agent spent handling calls, including after call work, relative to total working time (i.e., handling calls and being ready to handle calls).
Average Handling Time (Inbound)	Average handling time, including after call work, for the inbound calls.

Average Handling Time (Outbound)	Average handling time, including after call work, for the outbound calls.
Total Logon Time	Total time the agent was logged on during the reporting interval.
Number of Surveys	Number of surveys available for calls handled by the agent.
First Call Resolution %	Percent of surveys that indicated first call resolution relative to total number of surveys available for calls handled by the agent.
Contact Satisfaction	Average of contact satisfaction marks from all surveys available for calls handled by the agent.
Net Promoter Score	Net Promoter Score (NPS) based on the results of surveys available for calls handled by the agent. For more information about NPS, see http://www.netpromoter.com/why-net-promoter/know/
Call Rejects	Number of inbound calls that the agent actively rejected.
Initiated Transfers	Number of calls that the agent transferred.

[< Previous](#) | [Next >](#)

Team Operation Quality Report

This report provides metrics from surveys and quality monitoring activities for selected teams.

All interaction-related metrics in this report are calculated for call and chat media types. For team email metrics, use the [Team Email Report](#).

Metric Name	Description
Calls Graded	Number of calls handled by all agents of this team that were graded. For more information about call grading, see section General Information About Quality Management .
Number of Surveys	Number of surveys available for calls handled by all agents of this team.
First Call Resolution %	Percent of surveys that indicated first call resolution relative to total number of surveys available for calls handled by all agents of this team.
Contact Satisfaction	Average of contact satisfaction marks from all surveys available for calls handled by all agents of this team.
Net Promoter Score	Net Promoter Score (NPS) based on the results of surveys available for calls handled by all agents of this team. For more information about NPS, see http://www.netpromoter.com/why-net-promoter/know/

Team Performance Report

This report provides general performance metrics for selected teams.

All interaction-related metrics in this report are calculated for call and chat media types. For team email metrics, use the [Team Email Report](#).

Metric Name	Description
Occupancy %	Percent to time all agents of this team spent handling calls, including after call work, relative to total working time (i.e., handling calls and being ready to handle calls).
Number of Calls Handled	Total number of inbound calls handled by all agents of this team.
Average Handling Time (Inbound)	Average handling time, including after call work, for the inbound calls handled by all agents of this team.
Number of Calls Made	Total number of outbound calls handled by all agents of this team.
Average Handling Time (Outbound)	Average handling time, including after call work, for the outbound calls handled by all agents of this team.
Number of Surveys	Number of surveys available for calls handled by all agents of this team.
First Call Resolution %	Percent of surveys that indicated first call resolution relative to total number of surveys available for calls handled by all agents of this team.
Contact Satisfaction	Average of contact satisfaction marks from all surveys available for calls handled by all agents of this team.
Net Promoter Score	Net Promoter Score (NPS) based on the results of surveys available for calls handled by all agents of this team. For more information about NPS, see http://www.netpromoter.com/why-net-promoter/know/

Scenario Block Disconnects Report

This report shows the distribution of abandoned calls over the blocks of a selected scenario. Only the blocks where abandonment of calls occurred in the reporting interval are displayed.

Metric Name	Description
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Block Type	Scenario block type.
Block Title	Scenario block title.
Number of Disconnects	Number of calls abandoned while the given scenario block was being executed.
% of All Calls	Percent of calls abandoned while the given scenario block was being executed relative to all calls abandoned within this scenario.

[< Previous](#) | [Next >](#)

Scenario Block Frequency Report

This report shows the frequency of execution of each block of a selected scenario relative to execution of other blocks of the same scenario. For each block, the distribution of execution results over possible exits is provided.

Metric Name	Description
Block Type	Scenario block type.
Block Title	Scenario block title.
Exit	Scenario block exits.
Visits	For the block, number of times the given block was executed. For an exit, number of times the given exit of the block was taken.
%	For the block, percent of times the given block was executed relative to number of times all blocks of the given scenario were executed. For an exit, percent of times the given exit was taken relative to number of times the block was executed.

[< Previous](#) | [Next >](#)

Requested Skills Report

This report shows demand for different skills defined in your contact center. The skills are arranged according to their groups, and the report shows requests for each individual skill and the totals for the group. Note that if a call requested several skills, it will be counted separately for each requested skill in all metrics of this report. Metrics in this report include campaign calls.

All metrics in this report are calculated for interactions of call and chat media types only.

Metric Name	Description
Average Speed of Answer	Average time that answered calls requesting this skill spent waiting in the service queue and ringing desktop before being answered.
Number of Calls Received	Total number of calls that requested this skill in the given reporting interval.
Number of Calls Queued	Number of calls requesting this skill that entered the queue.
Number of Calls Answered	Number of calls requesting this skill that were answered by agents.
Overflow Calls	Number of calls requesting this skill that were routed to overflow destinations.

[< Previous](#) | [Next >](#)

Service in Time Report

This report provides main key performance indicators for selected inbound services with breakdown of the requested reporting interval into lower-level reporting intervals (e.g., weekly/monthly reports will show metrics for each day of the week/month, daily reports will show metrics for each hour of the day).

All interaction-related metrics in this report are calculated for call and chat media types. For email service metrics, use the [Email Service Report](#).

Metric Name	Description
Number of Calls	Total number of calls that requested this service in the given reporting subinterval.
In Service Level %	Percent of calls to this service that were answered within the predefined service level threshold relative to all answered or abandoned calls except the calls abandoned within that threshold.
Max Agents	Maximum number of agents possessing this service skill who were logged on simultaneously within the given reporting subinterval.
Min Agents	Minimum number of agents possessing this service skill who were logged on simultaneously within the given reporting subinterval.
Occupancy %	Percent of time agents spent handling calls to this service, including after call work, relative to the total working time (i.e., the time spent handling calls to this service including after-call work and time in the Ready state).
Overflow Calls %	Percent of calls to this service that were routed to overflow destinations .

[< Previous](#) | [Next >](#)

Service Metrics Report

This report provides a full set of key performance indicators for selected inbound services.

All related metrics in this report are calculated for call and chat media types. For email service metrics, use the [Email Service Report](#).

Metric Name	Description
Number of Calls Received	Total number of calls that requested this service in the given reporting interval. If a call requests a service upon arrival and then also transferred to the same service internally, it will be counted twice in this metric.
Received as Transfers	Number of calls that requested this service via transfer operation.
Service Level	Percent of calls to this service that were answered within the predefined service level threshold relative to all answered or abandoned calls except the calls abandoned within that threshold.
Self Service	Number of calls serviced by an IVR application (as indicated by execution of scenario block Self-Service Provided).
%	Percent of calls serviced by an IVR application relative to total number of calls that requested this service.
Abandoned in IVR	Number of calls to this service that were abandoned before entering the queue (i.e., while still in the IVR stage).
%	Percent of calls to this service that were abandoned in IVR relative to total number of calls that requested this service.
Queued	Number of calls to this service that entered the queue. Includes calls that selected the Virtual Queue option.
%	Percent of calls to this service that entered the queue relative to total number of calls that requested this service.
Abandoned	Number of calls to this service that were abandoned outside of the service level threshold. Includes calls that were abandoned while ringing. Includes calls that selected the Virtual Queue option and (1) did not answer when called back or (2) were busy when called back or (3) answered when called back but hang up before being connected to the agent.
%	Percent of calls to this service that were abandoned outside of the service level threshold relative to total number of calls that requested this service except the calls abandoned within the service level threshold.
Abandonment Time, Average	Average time the abandoned calls to this service spent waiting in the service queue and/or ringing before being abandoned (excluding calls abandoned within the service level threshold).
Overflow	Number of calls to this service that were routed to overflow destinations .
%	Percent of calls to this service that were routed to overflow destinations relative to total number of calls that requested this service.
Answered	Number of calls to this service that were answered by agents. Includes calls that selected the Virtual Queue option , answered when called back, and were connected to agents.

%	Percent of calls to this service that were answered by agents relative to total number of calls that requested this service.
Average Speed of Answer	Average time that answered calls spent waiting in the service queue and ringing desktop before being answered.
Average Handling Time (Inbound)	Average time that answered calls to this service were handled by agents. Includes hold time and after-call-work time.
Average Talk Time (Inbound)	Average talk time for the calls to this service that were answered.
Average Hold Time (Inbound)	Average hold time for the calls to this service that were put on hold at any time during their handling.
Average Wrap-up Time (Inbound)	Average after-call-work time for the calls to this service.
Number of Calls Made	Number of outbound calls associated with this service including unanswered calls.
Average Handling Time (Outbound)	Average time that answered outbound calls associated with this service were handled by agents. Includes hold time and after-call-work time. Does not include dialing time.
Average Talk Time (Outbound)	Average talk time for the outbound calls associated with this service.
Average Wrap-up Time (Outbound)	Average after-call-work time for outbound calls associated with this service.
Number of Surveys	Number of surveys available for calls (both inbound and outbound) associated with this service.
First Call Resolution %	Percent of surveys that indicated first-call resolution relative to number of surveys where the first-call resolution was responded to.
Contact Satisfaction	Average of contact satisfaction marks from all surveys where the contact satisfaction question was responded to.
Net Promoter Score	Net Promoter Score (NPS) based on the results of surveys available for calls associated with this service. For more information about NPS, see http://www.netpromoter.com/why-net-promoter/know/

[< Previous](#) | [Next >](#)

Service Staffing and Overflow Report

This report shows the distribution of inbound calls to selected services over regular and overflow destinations. Each agent team whose agents participated in handling of the calls to a given service will be reported as a separate destination under this service. Each external number used as an [overflow target](#) for the calls to a given service will also be reported as a separate destination under this service.

All metrics in this report are calculated for call and chat media types.

Metric Name	Description
Number of Calls Answered	For the service, total number of calls to this service that were answered. For a destination, number of calls to this service answered at the given destination.
Average Handling Time (Inbound)	Average time that answered calls to this service were handled regardless of the destination. For a destination, average time that answered calls to this service routed to the given destination were handled at that destination.
% Abandoned	For a destination, percent of calls to this service routed to the given destination that were abandoned while ringing relative to total number of calls that requested this service and routed to that destination. Only the calls abandoned outside of service level threshold are counted. For the service, percent of calls to this service routed to all destinations that were abandoned while ringing relative to total number of calls that requested this service and routed to any destination. Only the calls abandoned outside of service level threshold are counted.

[< Previous](#) | [Next >](#)

Virtual Queue (Callback) Report

This report provides a set of metrics for [virtual queues](#) associated with selected services. Unless noted otherwise with respect to a particular metric, any *callback* mentioned in this table shall be interpreted as a callback attempt made with respect to the given service. Note that callback attempts are counted for the aggregation intervals in which the corresponding inbound calls entered the system.

Metric Name	Description
Callbacks Requested	Number of calls queued for this service that requested callbacks (i.e., selected the Virtual Queue option).
%	Percent of calls queued for this service that requested callbacks relative to all incoming calls except the ones abandoned in IVR or short abandoned.
Callbacks Busy	Number of callbacks that failed because the called party was busy.
%	Percent of callbacks that failed because the called party was busy relative to all requested callbacks.

Callbacks No Answer	Number of callbacks that failed because the called party did not answer.
%	Percent of callbacks that failed because the called party did not answer relative to all requested callbacks.
Callbacks Answered	Number of callbacks that were answered by the called party.
%	Percent of callbacks that were answered by the called party relative to all requested callbacks.
Avg Wait Time to Callback	Average callback wait time (i.e., time between the callback requests and the related initial callback attempts).
Avg Callback Dialing Time	Average callback answer time (i.e., time between the moments when callback attempts were initiated and the customers answered them).
Avg Agent Answer Time	Average callback connection time (i.e., time between the moments when customers answered callback attempts and were connected to the agents).
Callbacks Abandoned	Number of callbacks that were answered by customers and then abandoned by them while waiting for an agent (in queue or ringing).
%	Percent of Callbacks Abandoned relative to all requested callbacks.

[< Previous](#) | [Next >](#)

Campaign in Time Report

This report provides a set of key performance indicators for a selected outbound campaign.

Metric Name	Description
Records Completed	Number of campaign records completed within the reporting interval for which at least one number was dialed.
Records Excluded	Number of campaign records completed within the reporting interval for which no attempts were made because of DNC match or filter exclusion.
Dialed	Number of campaign calls that were attempted in the reporting interval.
Avg Calling Rate	Number of campaign calls that were attempted in the reporting interval divided by the number of minutes in this interval.
Live Answered	Number of campaign calls that were answered by called parties.
ASR %	Average Success Rate. Percentage of answered calls relative to the total number of attempts.
Abandoned	Number of campaign calls that were abandoned, i.e., terminated by the called party after answer while waiting to be connected to an agent.
Dropped	Number of answered campaign calls that were disconnected by the system.
Handled	Number of campaign calls that were answered by agents

Avg Connection Time	Average time in which the calls that were answered by the called parties were connected to agents.
Avg Handle Time	Average time that answered calls to this service were handled by agents. Includes hold time and after-call-work time.
Avg Talk Time	Average talk time for the calls to this service that were answered.
Avg Hold Time	Average hold time for the calls to this service that were put on hold at any time during their handling.
Avg ACW Time	Average after-call-work time for the calls to this service.
Occupancy %	Percent of time agents spent handling calls of this campaign, including after call work, relative to the total working time (i.e., the time spent handling calls for all campaigns/services and time in the Ready state).
Max Agents	For each team associated with this campaign, maximum number of agents logged on simultaneously within the given reporting subinterval.
Min Agents	For each team associated with this campaign, minimum number of agents logged on simultaneously within the given reporting subinterval.
FTE	For each team associated with this campaign, total login time of all agents during the reporting interval divided by the length of the interval.
Preview Records Viewed	Number of preview records that were reviewed by agents.
Avg Preview Time	Average time the preview records were reviewed by agents.

[< Previous](#) | [Next >](#)

Dispositions in Time Report

This report provides breakdown of calls associated with the selected service or campaign by the applied [disposition](#). This report applies to services of all supported media types.

Metric Name	Description
[Disposition name]	Number of interactions whose processing ended with the given disposition. (The report will provide a column for each disposition applied during the reporting interval.)
[Disposition name] %	Percent of interactions whose processing ended with the given disposition relative to <i>Total processed</i> . (The report will provide a column for each disposition applied during the reporting interval.)

Total processed	Total number of interactions processed in the given reporting interval. For outbound and blended services, includes all campaign call attempts.
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[< Previous](#) | [Next >](#)

Telemarketing Compliance Report

This report, applicable to predictive campaigns only, focuses on calls that were answered by called parties and not connected to the agent within the [Unattended call timeout](#).

Note: FCC refers to these calls as *abandoned calls* and limits the number of such calls within campaign relative to the total calls answered. The related metric is called *Abandonment Rate*. In ServicePattern terminology, such calls are referred to as *unattended* and the related ratio is called *Unattended %*. This is done in order to avoid confusion with the traditional use of *abandoned* in the contact center industry, where it is normally reserved for calls terminated by customers before being connected to an agent.

Metric Name	Description
Calls Answered	Number of campaign calls that were answered by called parties.
Calls Unattended	Number of campaign calls that were answered by called parties and subsequently either diverted to an IVR at any time, or dropped at any time, or connected to an agent with time exceeding the Unattended call timeout .
Unattended %	Percent of <i>Calls Unattended</i> relative to <i>Calls Answered</i> .

[< Previous](#) | [Next >](#)

Email Service Report

This report provides key performance indicators for services of email media type.

Metric Name	Description
Received	Total number of inbound emails that requested this service in the given reporting interval (includes both new emails and emails related to existing threads). Interactions received via transfer or service change are excluded.
Received New	Number of new inbound emails that requested this service in the given reporting interval (emails related to existing email threads are excluded). Interactions received via transfer or service change are excluded.
Received by transfer	Number of inbound emails that requested this service via transfer. Interactions received via service change are excluded.

Received by service change	Number of inbound emails that were received via re-categorization by agents (i.e., the agent changed an originally assigned email service to this service and continued processing the interaction).
Carried Over	Total number of emails that arrived at this service at any time before the given reporting interval and remained unprocessed at the beginning of the interval (includes both new emails and emails related to existing threads).
Carried Over New	Number of new emails that arrived at this service at any time before the given reporting interval and remained unprocessed at the beginning of the interval (emails related to existing email threads are excluded).
Processed - Total	Number of inbound emails that were completed by any method within the given reporting interval. The sum of <i>Replied</i> , <i>Closed</i> , <i>Transferred</i> , and <i>Service Changed</i> .
Processed - Replied	Number of inbound emails that were replied to within the given reporting interval (includes emails that were forwarded). Note that only the first reply is counted. Possible follow-up email messages related to previously replied emails are considered outbound emails and counted by the <i>OUT Sent</i> metric
Processed - Closed	Number of inbound emails that were closed without reply by agents within the given reporting interval.
Processed - Transferred	Number of inbound emails that were transferred to other services within the given reporting interval.
Processed - Service Changed	Number of inbound emails that were re-categorized by agents (i.e., the agent changed this service to another email service and continued processing the interaction).
Remaining	Number of inbound emails that were not completed at the end of reporting interval.
Avg Reply Time	Average reply time for inbound emails. The time is measured from the moment the email is placed in the service queue to the moment when the first meaningful reply is sent.
Replied in SL %	Percent of emails for which the first meaningful reply was sent within the pre-defined service level threshold relative to all replied emails. Note that when compared with the service level threshold, the reply time excludes the time that is outside of the hours of operation specified for the given service.
Outbound Sent	Total number of outbound emails that were sent within the given reporting interval. Includes both new outbound emails and possible follow-up email messages related to existing threads.

[< Previous](#) | [Next >](#)

Agent Email Report

This report provides key performance indicators for agents handling interactions of email media type.

Metric Name	Description
Offered	Number of inbound emails that were pushed to the agent within the given reporting interval.

Not Accepted	Number of emails that were pushed to the agent and were not accepted (i.e., returned to the queue or to the transferring agent). Note that a postponed email is considered accepted.
Pulled	Number of inbound emails that the agent pulled from the service queues within the given reporting interval.
Assigned	Number of emails that were placed in this agent's personal queue by a supervisor or another agent.
Carried Over	Number of emails that were delivered to this agent by any method before the given reporting interval and remained unprocessed at the beginning of the interval.
Processed - Total	Number of inbound emails that this agent completed by any method within the given reporting interval. The sum of <i>Replied</i> , <i>Closed</i> , <i>Transferred</i> , and <i>Service Changed</i> .
Processed - Replied	Number of inbound emails that this agent replied to within the given reporting interval (includes emails that the agent forwarded). Note that only the first response is counted. Possible follow-up email messages related to previously replied emails are considered outbound emails and counted by the <i>Outbound Sent</i> metric.
Processed - Closed	Number of inbound emails that this agent closed without reply within the given reporting interval.
Processed - Transferred	Number of inbound emails that this agent transferred within the given reporting interval.
Processed - Service Changed	Number of inbound emails that this agent re-categorized (i.e., the agent changed this service to another email service and continued processing the interaction).
Remaining	Number of emails in agent's personal queue at the end of the reporting interval.
Avg Reply Time	Average time this agent spent replying to an inbound email. The time is measured from the moment an email is delivered to the agent (his desktop or personal queue) to the moment when the first meaningful response leaves his personal queue.
Avg In-focus Time	Average time the agent had an inbound email selected in his active communications list. Counted only for the emails that agents replied to.
Avg Out-of-focus Time	Average time the agent had an inbound email active on his desktop but not selected in his active communications list. Counted only for the emails that agents replied to.
Avg ACW Time	Average time the agent spent doing after call work related to replied emails.
Outbound Sent	Total number of outbound emails that this agent sent within the given reporting interval. Includes both new outbound emails and possible follow-up email messages related to existing threads.
Outbound Discarded	Number of outbound emails that this agent started at any time and discarded (deleted without sending) within the given reporting interval. Includes both new outbound emails and possible follow-up email messages related to existing email threads.

[< Previous](#) | [Next >](#)

Team Email Report

This report provides key performance indicators for teams handling interactions of email media type. It has the same set of metrics as the [Agent Email Report](#), combined for all agents of selected teams who handled email interactions.

[< Previous](#) | [Next >](#)

Concurrent Users Report

This report shows the maximum number of users that were logged into the system via the Agent Desktop application on each day within the selected month. Days without any users logged on are skipped.

[< Previous](#) | [Next >](#)

Carrier Usage Reports

Your service provider may make carrier usage reports available to you. These reports provide information about usage of carriers' resources by your contact center. If these reports are available, you can download them via the *Reports > Telco Usage* menu of the Contact Center Administrator application. You will be able to download and review carrier usage data for completed reporting/billing intervals (*Statements*) as well as for the current reporting interval before it is complete (*Current Usage*).

Note: Depending on the Service Provider practices, at the end of the reporting period usage data collected by the ServicePattern system may be verified against the data received from the carrier and reconciled if necessary. Thus the *Current Usage* data is not reconciled and is subject to change upon verification against the data received from the carrier at the end of the reporting interval. On the other hand, *Statements* typically contain reconciled data.

Reports are available in two formats, summary and detail.

The summary report aggregates usage by billable [access numbers](#) assigned to your contact center. For each number, the following information is shown:

- carrier's name
- total number of inbound calls received via this number
- total number of minutes in the above inbound calls
- total number of outbound calls where this number was used as the caller ID
- total number of minutes in the above outbound calls
- total number of inbound SMS messages received via this number
- total number of outbound SMS messages where this number was used as the caller ID

The detailed format shows details of every inbound and outbound call made by your contact center, as well as details of all received and sent SMS messages. For each interaction the following information is shown:

- carrier's name
- start *date* and *time*
- caller ID (field *from number*)

- DNIS (field to *number*)
- duration (for SMS messages this field will be left blank)
- direction - *inbound* or *outbound* (for SMS will show *inbound SMS* or *outbound SMS*)
- [access number](#) billed by the carrier for this interaction

Note: Call duration is reported in minutes rounded to one decimal place. Rounding is performed using formula $(\# \text{ of seconds} + 5) / 6$ and discarding the fraction. E.g., actual duration of 4 seconds will be reported as 0.1 minutes. in usage reports. Actual duration of 7 seconds will be reported as 0.2 minutes.

[< Previous](#) | [Next >](#)

Simple Format

The table below describes the fields of the [campaign results](#) exported or downloaded from the system in the simple format. This format shows only the result of the last call attempt for a calling record, i.e., contains one row per record.

Field Name	Description
[Calling record fields]	Values of all fields of the calling record. The fields have the same names, same values, and are arranged in the same order in which they appear in the calling list .
[Activity form fields]	Values of the fields of the activity form associated with this campaign. Only the fields that are marked for <i>export in results</i> will appear in the results.
Total attempts (per rec)	Total number of call attempts made for this calling record.
Completed	Set to "1" if the record is completed (a final disposition set); otherwise set to "0". For records whose processing was stopped or never started because a campaign quota was reached (see <i>Out of Quota</i> below), this field is set to "0".
Record Disposition	Disposition set for this record when it is completed. For description of pre-configured dispositions, see section Pre-defined Dispositions of the <i>ServicePattern Contact Center Administrator Guide</i> .
Record Disposition Code	Alphanumeric code of the <i>Record Disposition</i> (if defined in configuration).
Out of Quota	Set to "1" if the record processing was stopped or never started because the campaign quota related to this record was reached or because the record did not match any quota groups defined within the campaign.
Quota Group	For any record where the <i>Out of Quota</i> field is set to "1", this field indicates which particular value group reached its quota before this record could be processed. If the record was not processed because it did not match any quota groups defined within the campaign, this field will be set to "<no match>".
Last Phone Called	Phone number dialed during the last call attempt for this record. Copied from the calling record.

Last Call Disposition	Disposition set for the last call attempt made for this record. For description of pre-configured dispositions, see section Pre-defined Dispositions of the <i>ServicePattern Contact Center Administrator Guide</i> .
Last Call Disposition Code	Alphanumeric code of the <i>Last Call Disposition</i> (if defined in configuration).
Last Note	Last call notes entered for by the agent for the last call made for this record.
Last Call Time	Date and time when the last call attempt for this record started.
Last Call Duration	Duration of the last call made for this record in seconds from the moment answer was detected. Set to "0" for unsuccessful call attempts.
Last Agent	Username of the agent who last talked to the customer on the last call made for this record.
Global Interaction ID	Global interaction Identifier of the last call attempt for this record.
List Name	Name of the calling list that contains this record as defined in configuration.

[< Previous](#) | [Next >](#)

Detailed Format

The table below describes the fields of the [campaign results](#) exported or downloaded from the system in the detailed format. This format shows results of all call attempts made for a calling record, i.e., contains one row per call attempt. Note that all attempts to process a record will be listed, including the ones where no actual dialing was initiated (e.g., if record matched a Do-Not-Call condition or a campaign quota was had been reached).

Field Name	Description
[Calling record fields]	All fields of the calling record for which this call attempt was made. The fields have the same names, same values, and are arranged in the same order in which they appear in the calling list .
[Activity form fields]	Values of the fields of the activity form associated with this campaign. Only the fields that are marked for <i>export in results</i> will appear in the results.
This Phone number	Phone number used for this call attempt.
Is Call Attempt	Set to "1" if a call was actually dialed. Starting from release 3.11, a non-empty <i>Global Interaction Identifier</i> field (see below) can be used for the same purpose.
Completed	Set to "1" if the record was completed during this call attempt (a final disposition set); otherwise set to "0". For records whose processing was stopped at this attempt because a corresponding campaign quota had been reached (see <i>Out of Quota</i> below), this field is set to "0".

Record Disposition	Disposition set for the record if completed during this call attempt. For description of pre-configured dispositions, see section Pre-defined Dispositions of the <i>ServicePattern Contact Center Administrator Guide</i> .
Record Disposition Code	Alphanumeric code of the <i>Record Disposition</i> (if defined in configuration).
Out of Quota	Set to "1" if the record processing was stopped or never started because the campaign quota related to this record was reached or because the record did not match any quota groups defined within the campaign.
Quota Group	For any record where the <i>Out of Quota</i> field is set to "1", this field indicates which particular value group reached its quota before this record could be processed. If the record was not processed because it did not match any quota groups defined within the campaign, this field will be set to "<no match>".
Call Disposition	Disposition set for this call attempt. For description of pre-configured dispositions, see section Pre-defined Dispositions of the <i>ServicePattern Contact Center Administrator Guide</i> .
Call Disposition Code	Alphanumeric code of the <i>Call Disposition</i> (if defined in configuration).
Call Note	Call notes entered for by the agent for this call attempt. For unsuccessful call attempts, this field can be used by the system to report details of the failed called attempt (CPA results and SIP signaling codes). For interpretation of the CPA results, see <i>CPA_result</i> below.
Call Time	Date and time when this call attempt started.
Dialing Duration	Duration of the dialing phase of this call attempt from the moment it is initiated and until network signaling reports is as either answered or failed (congestion, busy, invalid number, etc.)
CPA Duration	Duration of the CPA (call progress analysis) phase of this call attempt from the moment network signaling reports the call as answered and until the decision about the type of answer is made (live voice, fax/modem, answering machine)
Answered Duration	Duration of the call resulting from this call attempt from the moment live voice was detected and until it is released. Does not include after-call work. Set to "0" for unsuccessful call attempts.
Agent	Username of the agent who last talked to the customer during the call resulting from this call attempt.
Connected	Set to "1" if the call was established from the PSTN point of view, "0" otherwise. Established calls may incur connection and duration charges.

CPA result	Result of call progress analysis for this call attempt. Possible values: <i>0 – Unknown</i> (no result, e.g., when call ended before CPA was applied or finished) <i>1 – Voice</i> (live voice detected) <i>2 – Answering Machine</i> (an answering machine greeting detected) <i>3 – Announcement</i> (speech detected that is not live voice or an answering machine greeting; e.g., an IVR prompt) <i>4 – FAX</i> (a fax/modem response detected) <i>5 – SIT</i> (a SIT tone detected) <i>6 – Busy</i> (a busy tone detected; usually indicates that the called party is busy) <i>7 – Fast Busy</i> (a fast busy signal detected; usually indicates that the call cannot be established due to network congestion; sometimes is also used to indicate invalid and/or disconnected numbers) <i>8 – Ring Back</i> (ring back tone detected and continued beyond the <i>No Answer</i> timeout; see <i>ServicePattern Contact Center Administrator Guide</i>, section <i>Outbound Campaign Settings</i> for more information) <i>9 – Silence</i> (no sound detected for longer than 5 seconds) Note that CPA results may not have direct (one-to-one) correspondence to call dispositions. The latter are determined based on combination of CPA results, line signaling, and some other factors.
CPA recording file	Name of the file where CPA recording for this call attempt is stored.
CPA RTP server id	Identifier of the host name of the RTP server where the <i>CPA recording file</i> is stored.
Recording file	Name of the file where conversation recording for the call resulting from this call attempt is stored.
RTP server id	Identifier of the host name of the RTP server where the <i>Recording file</i> is stored.
Global Interaction ID	Global interaction Identifier of this call attempt. Empty field indicates that the call was never actually dialed. For preview campaigns note that if an agent makes several call attempts while handling one preview record, all such call attempts will have the same global ID.

Record ID	Unique identifier of the record for which this calling attempt was made. Generated during calling list import.
List Name	Name of the calling list that contains the record for which this call attempt was made as defined in configuration.
Is Inbound Call	Set to "1" if the attempted call was an inbound call within a blended service, i.e., customer returned a missed call using the campaign Caller ID. Specified only if <i>Is Call Attempt</i> is set to "1".

[< Previous](#) | [Next >](#)

Recordings Details Format

The table below describes the fields of the data file that accompanies [export of call recordings](#) and maps them to the available components of configurable file names that are assigned to recordings during export. The file is exported in the csv format and contains details of the corresponding calls, which may facilitate search for specific recordings once they have been exported out of the system.

Note that conference calls produce multiple recordings corresponding to the number of participating agents. The recording details file in this case will contain a separate record for each recording.

Field Name	File Name Component	Description
Start Time	\$(callDate), \$(callTime)	Date and time of call start.
Agent loginId	\$(agent)	Username of the agent who last handled this call.
Agent First Name	\$(agentFirstName)	First name of the agent who last handled this call.
Agent Last Name	\$(agentLastName)	Last name of the agent who last handled this call.
Customer phone	\$(customerPhone)	Customer's phone number (technically, the phone number of the party opposite to the above agent).
Direction	\$(direction)	Call direction, Inbound or Outbound
Service	\$(service)	Name of the service or campaign associated with this call
Disposition	\$(disposition)	Call disposition
Notes	N/A	Call notes entered for by the agent
Voice Signature	\$(voiceSignature)	An indicator of whether the recording contains a voice signature .
Flagged	\$(flagged)	An indicator of whether the call was flagged .
Talk Time	N/A	Total talk time of this call.

Export status	N/A	An indicator of whether the recording was actually exported (success) or the recording was never found (failed).
RecordingId	N/A	Name of the file that contains recording of this call.
Global Interaction ID	\$(globalInteractionId)	Global interaction identifier of this call. Note that there may be more than one call recording file with the same identifier.
N/A	\$(callDuration)	Overall call duration.
N/A	\$(callHour)	Ordinal number of the hour (from 00 to 23) during which the call started.
N/A	\$(currentDate)	The value is set to the date when the recording is exported.
N/A	\$(currentTime)	The value is set to the time when the recording is exported.
N/A	\$(uniqueId)	Unique identifier assigned to this recording. Unlike <i>Global Interaction ID</i> (above), this value is unique for each exported recording.

[< Previous](#)