Using Avaya Analytics™ Reports for Avaya Oceana®

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Contents

Chapter 1: Introduction

Purpose

The purpose of this document is to provide information about how to use the features and capabilities of Avaya Analytics™. This document also provides instructions to create a suite of historical reports for Avaya Oceana® contact center activities.

This document is intended for users who want to use Avaya Analytics™ to create and view historical reports for their Avaya Oceana® contact center activities.

Changes history

Issue	Date	Summary of changes
3.0	November 2021	Minor updates throughout the document.
2.0	April 2021	• Updates in several topics in the **Managing historical reports** chapter. • New topics in the **Managing historical reports** chapter: - Scheduling a dossier - Printing a dossier - Subscribing to a dossier • Updates in the **Engagement**, **Contact Setail Summary**, and **Time Series** sections. • Updates in several topics in the **Call Profile reports** chapter
1.0	April 2021	Initial release

New in this release

Avaya Analytics™ Release 4.1.1 includes the following features and enhancements:

Support for historical reporting on routing service groups in Avaya Analytics™

Avaya Analytics™ supports historical reporting on routing service groups. Supervisors can effectively monitor the historical performance of routing services within a routing service group for a specific reporting interval.

Avaya Analytics™ Historical Reporting provides options for users to import data from different data sources and create reports, documents, and dossiers on their imported data.

Avaya Analytics™ Call Profile reports

Avaya Analytics™ Call Profile reports for Routing Service Groups report on the number of calls that were Answered, Abandoned, Active, or Waiting in Queue for the following duration intervals (in seconds): 5, 10, 20, 60, and 120+. The following Call Profile reports are available:

- Call Profile Abandoned
- Call Profile Answered
- Call Profile Active Time Duration
- Call Profile Waiting in Queue

Support for approval of outbound emails

Avaya Oceana® introduces support for approval of outbound agent email replies. For customer satisfaction and to avoid escalations, an agent's email responses can now be routed through an approval process.

Avaya Analytics™ supports the ability to generate custom reports on the approval or rejection of the outbound emails for both real-time and historical operations.

Chapter 2: Overview

Avaya Analytics™ overview

Avaya Analytics™ is a microservices-based reporting solution that collects events from Avaya Oceana®. These events are translated into Contact Center measures and stored in the reporting database. With these measures, you can create a suite of historical reports for Avaya Oceana®. The evolution of the Avaya Analytics™ reporting platform provides the ability to view and analyze Avaya Oceana® data through historical interaction dashboards.

Avaya Analytics™ also offers a suite of measures for real-time dashboards to provide a view of the key Contact Center KPIs to supervisors and Contact Center managers.

With the new interface of Avaya Analytics™, you can:

- Streamline contact center operations
- Reduce operational costs
- Provide enhanced services to customers
- Get insights from interactions to enhance customer experience and agent performance
- Analyze interaction types that Avaya Oceana® supports

Avaya Analytics™ provides a simplified installation through the adoption of Avaya Common Services.

Historical reports overview

The historical dashboard reports display the historical data of the contact center resources, such as agents and the routing services of the various routing service groups. These reports provide a quick view of contact center performance for the specified time interval. You can use these reports as references to evaluate the historical performance of the contact center agents and supervisors. The data helps you to understand progress and performance over time and make informed decisions for the contact center.

Historical reports use interval-based measures to display a snapshot of the contact center. All historical summary and trend reports that return interval-based measures do not include data from the current 15-minute interval until data aggregation is run for the interval. By default, report caching settings are set to 15 minutes. Therefore, you might need to wait up to 30 minutes for the data of the current interval to display in the report.

You can also generate reports for a week, month, or year based on daily roll-up and monthly roll-up data. The daily reports do not include data for the current day because the data is calculated only the next day. The monthly reports do not include data for the current month because the data is calculated the next month.

As supervisor, you can use the Call Profile reports to determine the routing services' call performance in the routing service groups that they are assigned. You can compare the call performance and decide whether you need to plan process improvements.

Note:

The data retention period for these reports is configurable. The maximum data retention period for these reports are:

- 12 months for interval-based data
- 60 months for daily roll-up based data
- 9999 months for monthly roll-up based data

You can configure Routing Service Groups for Historical Reporting in Avaya Analytics™. The default value for Routing Service Groups is **Off**. For more information about configuring Routing Service Groups, see ***Chapter 2: Maintaining Avaya Analytics using the Cluster Control Manager console*** > ***Configuring Routing Service groups for Historical Reporting*** *topic in the Maintaining and Troubleshooting Avaya Analytics for Avaya Oceana guide.*

Historical Reporting offers:

- A web-based reporting application that provides historical reporting through a simplified interface

  With this interface, you can visualize the performance of the contact center over a specified reporting time. The interface provides enhanced user experience for report creation.
- Consolidation of historical contact center performance and customer data across the contact center
- Extensive library of tables, graphics, and ready-to-use displays
- Ability to drill-down to granular level information
- Filtering options
- Options to export reports to Excel and PDF formats

  Note:

  HTML data format is currently not supported.
- Ability to schedule reports to run at user-defined intervals
- Ability to schedule reports to run based on daily roll-up and monthly roll-up data
- Options for calculated measures
- Facility for time zone reporting to display data in the preferred time zone
- Multiple predefined reports
- Option to create custom reports or modify reports to meet your business requirements
- Option for advanced users to import data from different data sources to create reports, documents, and dashboards to report on their imported data.

- Option to export web objects for archiving the custom reports during an upgrade.

The historical reports based on interval data available in Avaya Analytics™ are:

- Account By Agent
- Agent By Routing Service
- Agent Configuration
- Agent Login/Logout Report
- Agent Not Ready by Reason Code
- Agent Performance Summary
- Contact Center
- Engagement
- Contact Detail
- Messaging Engagement Summary
- Routing Service
- Supervisor
- Time Series
- VDN

The historical reports based on daily roll-ups available in Avaya Analytics™ are:

- Account By Agent Daily
- Agent By Routing Service Daily
- Agent Not Ready by Reason Code Daily
- Agent Performance Summary Daily
- Contact Center Daily
- Routing Service Daily
- Supervisor Activity Daily
- Time Series Daily
- VDN Summary Daily

The historical reports based on monthly roll-ups available in Avaya Analytics™ are:

- Account By Agent Monthly
- Agent By Routing Service Monthly
- Agent Not Ready by Reason Code Monthly
- Agent Performance Summary Monthly
- Contact Center Monthly
- Routing Service Monthly
- Supervisor Activity Monthly

- Time Series Monthly
- VDN Monthly

Supervisors can use Call Profile reports to view the count of Answered and Abandoned calls. The Call Profile reports are:

- Call Profile Abandoned
- Call Profile Answered
- Call Profile Active Time Duration
- Call Profile Waiting in Queue

For more detailed information about the measures, data, and reports that Avaya Analytics™ provides, see *Avaya Analytics™ Data Dictionary* available from the Avaya Support website at https://support.avaya.com.

Avaya Analytics™ concepts

The following table lists Avaya Analytics™ concepts:

Concept	Description
Report	A request for a specific set of formatted data from your data source. A report consists of the following two parts: • A report template, which is the underlying structure of the report. • The report-related objects that are placed on the template. For example, attributes, metrics, filters, and prompts.
Document	A document displays your organization's data in a format similar to a PowerPoint presentation. Several grid and graph reports can be viewed at simultaneously with images and text. High-quality, Pixel Perfect™ documents allow you to display your business data that is suitable for presentation to the management. Examples of documents include the scorecards and dossiers, managed metrics documents, production, and operational documents. For example, a sales metrics document helps you analyze the sales deals and sales amounts for different stages of the shipment process. The document draws a visual representation of the sales and distribution process. It also includes several metrics that measure overall performance for successful and lost sales. You can use this document to understand overall sales activity, starting from generating inquiries to delivering goods to their customers. You can also use the data to analyze the key performance indicators that measure the performance of the sales organization.

Table continues…

Concept	Description
Dossier	A dossier is an interactive display to show and explore business data. Users with permissions can create a dossier and add visual representations of the data to the dossier to: • Make the data easier to interpret • Manipulate on the data to customize which information to display • Organize data into multiple chapters and pages to provide a logical flow to the dossier Dossiers provide personalized views of corporate information. You can view pre-configured dossiers or create your personalized views if you have the required permissions. Users with administrative privileges can create shared dossiers for groups of users with common responsibilities or job functions.
Attribute	A dimension with properties such as Agent Name.
Metric	A measure that provides calculation performed on the data. It specifies a numeric value such as the number of offered calls.
Filter	The default conditions based on which Avaya Analytics™ displays the results.
Prompt	A type of filter where you provide inputs based on which Avaya Analytics™ displays the results.

User roles

Use the following table to understand the Avaya Analytics™ defined user privileges.

Persona	Consumer	Basic users	Advanced users
You can	• Run dossiers, reports, and documents. • Perform basic operations, such as sort, pivot, drill, and export.	• All the capabilities provided to the consumer. • Create new dossiers, reports, and documents. • Modify or customize Avaya Analytics™ canned reports. • Access and import data from local machine for file formats, such as excel file, CSV files, and JSON files.	• All the capabilities provided to the basic users. • Interact with rest APIs to push external data, extract data subsets, and create datasets. • Connect and access data from a range of third-party databases.

Table continues…

You cannot	• Save or design new dossiers, reports or documents. • Create objects like prompts, filters, and metrics.	• Create objects like prompts and filters. • Create schema objects such as attributes and facts. • Leverage rest APIs. For example, access data pushed through the API.	• Create schema objects such as attributes, facts, and hierarchies.

Important:

Do not run reports as an administrator user. In Avaya Analytics™, administrators cannot create certain reports using their administrator user profiles. Additionally, some reports display inaccurate statistics when administrator users create these reports.

Subscription of reports

Avaya Analytics™ provides an option to subscribe to a historical report so that you can receive updated copies of the report.

If you want to set a date after which you do not want to receive subscription reports, on the Subscription settings page, expand **Advanced Options**, select the **Do not deliver after** option, and set the date.

To receive delivery notifications of your subscription reports by email, in the Delivery Notification section under **Advanced Options**, select the **Send notification to email address** option. Then, enter the email address in the **New Address** field.

The following table lists the types of subscriptions for a report:

Subscription Type	Description
Personal view	Saves a personal view of the reports generated on a given date and time into **My Subscriptions**.

Table continues…

Subscription Type	Description
History List	Contains the reports saved for future reference. Using the History List, you can create shortcuts to previously generated reports and also view the scheduled reports. History List subscriptions create a History List message for the specified report. You can then retrieve the report from the History List message in your History List folder. The History List folder contains messages for all the projects on which you work. The number of messages in this folder is controlled by the administrator, by the setting **Maximum number of messages per user**. For example, if you set this number at 40, and you have 10 messages for Project A and 15 for Project B, you can have no more than 15 for Project C. When the maximum number is reached, the oldest message in the current project is automatically deleted.
Cache Update	Refreshes the cache for the specified report. For example, your system contains a set of standard weekly, monthly, and yearly reports. These reports must be kept in cache if they are frequently accessed. Whenever the tables are updated, the appropriate caches must be refreshed. Cache update subscriptions often use event-triggered schedules for a refresh, because the caches are not required to be refreshed unless the underlying data changes.
Email	Delivers the subscribed reports to one or more email addresses as specified.
File	Saves the subscribed reports as an Excel or PDF file to a specified disk location on the network.
FTP	Saves the subscribed reports to a location on an FTP server in the file format you choose. The file format options are Comma Separated Values (CSV), PDF, HTML, MS Excel, and plain text.
Print	Prints the subscribed reports from a specified printer.
Mobile	Saves the subscribed reportto a mobile device, which can be a phone or a tablet. You can set a **Schedule** of your choice, such as `1st Day of Month` or `Weekly Monday`. You can set one of the following **Target Applications**: • Apple Push Notifications for Dossier on iPhone • Apple Push Notifications for Library on iPad • Google Cloud Messaging for Dossier on Android • Mobile APNS for iPad • Mobile APNS for iPhone • Mobile FCS for Android

Chapter 3: Getting Started

Logging on to Avaya Analytics™

About this task

Use this procedure to log on to the Avaya Analytics™ interface by using a supported browser. You must always use HTTPS for a secure connection.

For the list of supported browsers, see the *Avaya Oceana® Solution Description* document.

Before you begin

Do the following procedures described in *Maintaining and Troubleshooting Avaya Analytics™*:

- Creating a local user for Historical Reporting
- Adding a local user to a group
- Removing a local user from a group

Procedure

1. In the address bar of your browser, enter the following URL:

   `https://<FQDN>/AvayaAnalytics/servlet/AnalyticsWeb`

   In this URL, replace *<FQDN>* with the FQDN of the cluster configured during deployment.
2. Select **Standard** to log on as a local user or select **LDAP Authentication** to log on as an LDAP user.
3. In the **User name** field, type your user name.
4. In the **Password** field, type your password.
5. Click **Login**.

   Avaya Analytics™ displays the Projects page.
6. Select the project.

   Avaya Analytics™ displays the Home page.

Avaya Analytics™ home page field descriptions

The following table lists the fields and buttons available on the Avaya Analytics™ home page:

Name	Description
Shared Reports	A public folder containing canned reports and documents. The content of this folder is available to all users irrespective of user roles.
My Reports	A personalized folder containing the reports that you create.
History List	A folder containing previously run and scheduled reports.
My Subscriptions	A folder where you can view and manage your report subscriptions.
Create Dossier	The button to create a dossier.
Add External Data	The button to import data from an external source.
Create Report	The button to create a grid or graph report from scratch or a template.
Create Document	The button to create a document that displays your organization’s data in a format similar to a PowerPoint presentation.
Create Filter	The button to create a filter to limit the data returned by a query.
Create Prompt	The button to create a filter to define the content of a report.
Create Metric	The button to create a metric to analyze data.
Create Custom Group	The button to create a custom group to segment data.

Important:

The fields and buttons are available to users based on their roles. For information about the user roles, see User roles on page 15.

Shared Reports page field descriptions

The following table lists the folders available on the Shared Reports page:

Name	Description
Custom Reports	The folder containing the user-defined or custom reports or dashboards that are accessible to all users.
Standard Historical Reports	The folder that contains standard historical reports and documents of Avaya Analytics™.

Standard Historical Reports page field descriptions

The following table lists the folders and documents available on the Standard Historical Reports page:

Name	Description
Daily	Contains all canned reports that you can use to: • Customize respective documents • Create new documents and dossiers These reports are based on daily roll-up data tables.
Monthly	Contains all canned reports that you can use to: • Customize respective documents • Create new documents and dossiers These reports are based on monthly roll-up data tables.
Reports	Contains all canned reports that can be used to: • Customize respective documents • Create new documents and dossiers These reports are based on interval data tables.
Call Profile	Contains the following Call Profile reports: • Call Profile Abandoned • Call Profile Active Time Duration • Call Profile Answered • Call Profile Waiting in Queue
Account By Agent	Displays a summary of agents who handled the contacts for the accounts during the current interval.
Agent By Routing Service	Displays how the agents use routing services for the current interval.
Agent Configuration	Displays the agent information and properties.
Agent Login/Logout	Displays the login and logout information of agents. The information includes the login and logout time, total login duration, and the attributes associated with agents when they log in to the reporting interval.
Agent Not Ready By Reason Code	Displays the reason code associated with the agent auxiliary state.

Table continues…

Name	Description
Agent Performance Summary	Displays the performance and productivity of an agent by channels for the current interval.
Contact Center	Displays the performance summary of a contact center site.
Contact Detail Report	Displays the details of segments, and the segment durations of an engagement.
Engagement	Displays the data related to the customer engagements across various parameters.
Messaging Engagement Report	Displays the data related to customer engagements originated on the Messaging channel across various parameters.
Routing Service	Displays the overall performance of a routing service for the selected interval.
Supervisor	Displays a summary of the supervisor's activity for the current reporting interval.
Time Series	Displays the engagement of agents with an individual routing service for the current interval.
VDN Summary	Displays the overall performance of a routing point for customer experience.

Reports page field descriptions

The following table lists the reports available on the Reports page:

Name	Description
Account By Agent	Displays a summary of agents who handled the contacts for the accounts during the current interval.
Agent by Routing Service	Displays how the agents use routing services for the current interval.
Agent Configuration	Displays the agent information and properties.
Agent Login/Logout	Displays the login and logout information of agents. The information includes the login and logout time, total login duration, and the attributes associated with agents when they log in to the reporting interval.
Agent Not Ready By Reason Code	Displays the reason code associated with the agent auxiliary state.

Table continues…

Name	Description
Agent Performance	Displays the performance and productivity of an agent by channels for the current interval. This report consists of four reports: • **Agent Performance Summary**: Displays the performance and productivity of an agent by Channels for the current interval. • **Agent Performance Top 5 and Bottom 5**: Displays a performance summary of the top five and the bottom five agents for the current interval. • **Agent Compare**: Displays a comparison of different agent measures. • **Agent Behavior**: Displays individual occurrences of agent behaviors that are associated with engagement handling activities.
Call Profile Abandoned	Displays the number of calls that were abandoned for each of the routing services in a Routing Service Group.
Call Profile Active Time Duration	Displays the duration for which calls were active for each of the routing services in a Routing Service Group.
Call Profile Answered	Displays the number of calls that were answered for each of the routing services in a Routing Service Group.
Call Profile Waiting in Queue	Displays the number of calls that were waiting in a queue for each of the routing services in a Routing Service Group.
Contact Center	Displays the performance summary of a contact center site.
Contact Detail	Displays the details of segments, segment durations of an engagement, and a count of email engagements.
Engagement Report	Displays the data related to the customer engagements across various parameters.
Messaging Engagement Report	Displays the data related to customer engagements originated on the Messaging channel across various parameters.
Routing Service	Displays the overall performance of a routing service for the selected interval.

Table continues…

Name	Description
Supervisor	Displays a summary of the supervisor’s activity for the current reporting interval. This report consists of three reports: • **Supervisor Activity**: Displays a summary of the supervisor’s activity for the current reporting interval. • **Supervised Agent Activity**: Displays details of supervised agents and their behavior aspects in the current reporting interval. • **Supervised Agent Compare**: Displays a comparison of supervised agents for the current reporting interval.
VDN	Displays the overall performance of a routing point for customer experience.

Daily page field descriptions

The following table lists the folders and documents available on the Daily page:

Name	Description
Reports	Contains all canned reports that you can use to: • Customize respective documents • Create new documents and dossiers These reports are based on daily roll-up data.
Account By Agent Daily	Displays a summary of agents who handled the contacts for the accounts during the selected duration.
Agent By Routing Service Daily	Displays how the agents use routing services for the selected duration.
Agent Not Ready By Reason Code Daily	Displays the reason code associated with the agent auxiliary state.
Agent Performance Summary Daily	Displays the performance and productivity of an agent by channels for the selected duration.
Contact Center Daily	Displays the performance summary of a contact center site.
Routing Service Daily	Displays the overall performance of a routing service for the selected duration.
Supervisor Daily	Displays a summary of the supervisor’s activity for the selected reporting duration.

Table continues…

Name	Description
Time Series Daily	Displays the engagement of agents with an individual routing service for the selected duration.
VDN Summary Daily	Displays the overall performance of a routing point for customer experience.

Reports page field descriptions

The following table lists the reports available on the Reports page inside the `Daily` folder:

Name	Description
Account By Agent Daily	Displays a summary of agents who handled the contacts for the accounts during the selected duration.
Agent By Routing Service Daily	Displays how the agents use routing services for the selected duration.
Agent Not Ready by Reason Code Daily	Displays the reason code associated with the agent auxiliary state.
Agent Performance Summary Daily	Displays the performance and productivity of an agent by channels for the selected duration.
Contact Center Daily	Displays the performance summary of a contact center site.
Routing Attribute Timeline Daily	Displays the timeline of the routing attribute for the selected duration.
Routing Service Daily	Displays the overall performance of a routing service for the selected duration.
Supervisor Activity Daily	Displays a summary of the supervisor’s activity for the selected reporting duration.
Supervisor Daily	Displays a summary of the supervisor’s activity for the selected reporting duration.
Time Series Daily	Displays the engagement of agents with an individual routing service for the selected duration.
VDN Daily	Displays the overall performance of a routing point for customer experience.

Monthly page field descriptions

The following table lists the folders and documents available on the Monthly page:

Name	Description
Reports	Contains all canned reports that you can use to: • Customize respective documents • Create new documents and dossiers These reports are based on monthly roll-up data.
Account By Agent Monthly	Displays a summary of agents who handled the contacts for the accounts during the selected duration.
Agent By Routing Service Monthly	Displays how the agents use routing services for the selected duration.
Agent Not Ready By Reason Code Monthly	Displays the reason code associated with the agent auxiliary state.
Agent Performance Summary Monthly	Displays the performance and productivity of an agent by channels for the selected duration.
Contact Center Monthly	Displays the performance summary of a contact center site.
Routing Service Monthly	Displays the overall performance of a routing service for the selected duration.
Supervisor Monthly	Displays a summary of the supervisor's activity for the selected reporting duration.
Time Series Monthly	Displays the engagement of agents with an individual routing service for the selected duration.
VDN Summary Monthly	Displays the overall performance of a routing point for customer experience.

Reports page field descriptions

The following table lists the reports available on the Reports page inside the `Monthly` folder:

Name	Description
Account By Agent Monthly	Displays a summary of agents who handled the contacts for the accounts during the selected duration.
Agent By Routing Service Monthly	Displays how the agents use routing services for the selected duration.
Agent Comparison Monthly	Displays the perfomance comparison of agents for the selected duration.
Agent Not Ready by Reason Code Monthly	Displays the reason code associated with the agent auxiliary state.

Table continues…

Name	Description
Agent Performance Summary Monthly	Displays the performance and productivity of an agent by channels for the selected duration.
Contact Center Monthly	Displays the performance summary of a contact center site.
Routing Attribute Timeline Monthly	Displays the timeline of the routing attribute for the selected duration.
Routing Service Monthly	Displays the overall performance of a routing service for the selected duration.
Supervisor Activity Monthly	Displays a summary of the supervisor’s activity for the selected reporting duration.
Supervisor Monthly	Displays a summary of the supervisor’s activity for the selected reporting duration.
VDN Monthly	Displays the overall performance of a routing point for customer experience.

Call Profile page field descriptions

The following table lists the Call Profile reports available on the Call Profile page:

Name	Description
Call Profile Abandoned	Displays a summary of abandoned calls for a routing service for specified durations.
Call Profile Active Time Duration	Displays a summary of calls with active time for a routing service for specified durations.
Call Profile Answered	Displays a summary of answered calls for a routing service for specified durations.
Call Profile Waiting in Quese	Displays a summary of calls waiting in a queue for a routing service for specified durations

Configuring the default landing page

About this task

By default, after logging on to Avaya Analytics™, a common landing page is displayed as configured by the administrator. Use this procedure to set the landing page of your choice for your user account.

For example, if your default landing page is configured by the administrator to show the **My Reports** page, you can change it to view **My Subscriptions** or **History List**.

Procedure

1. Log on to Avaya Analytics™.
2. On the Home page, click the user account name list in the top-right corner.
3. Click **Preferences**.

   Avaya Analytics™ displays the User Preference page.
4. In the **Default start page** field, select an option from the drop-down list to set it as landing page for your account.

   The available options vary depending on the administrator’s configuration.
5. Select **Apply to Current project <Name of project>** from the drop-down list.
6. Click **Apply**.
7. Log out and log on again to view the landing page you configured.

Configuring the default language

About this task

Use this procedure to configure the default language for your user account in Avaya Analytics™.

The supported languages are:

- Chinese (Simplified)
- Chinese (Traditional)
- English
- French
- German
- Italian
- Japanese
- Korean
- Portuguese
- Russian
- Spanish

Procedure

1. Log on to Avaya Analytics™.
2. On the Home page, click the user account name list in the top-right corner.
3. Click **Preferences**.

   Avaya Analytics™ displays the User Preference page.

4. In the **Language** field, select your preferred language.
5. **(Optional)** For advanced options, click **Show advanced options** and select the inputs.
6. Select **Apply to Current project <Name of project>** from the drop-down list.
7. Click **Apply**.
8. Log out and log on again to verify the configured language.

Configuring the default time zone

About this task

Use this procedure to configure the default time zone for your user account.

Note:

This time zone is for the historical report interface and not for the reports data.

Procedure

1. Log on to Avaya Analytics™.
2. On the Home page, click the user account name list in the top-right corner.
3. Click **Preferences**.

   Avaya Analytics™ displays the User Preference page.
4. In the **Time Zone** field, select your time zone.
5. Select **Apply to Current project <Name of project>** from the drop-down list.
6. Click **Apply**.
7. Log out and log on again to verify the configured time zone.

Configuring the number of columns and rows in a grid

About this task

You can limit the number of rows or columns that are displayed in your report at one time. You can use the incremental fetch icons to view the additional data. The default value for both for rows is 50 and the default value for columns is 10.

Procedure

1. Log on to Avaya Analytics™.
2. On the Home page, click the user account name list in the top-right corner.
3. Click **Preferences**.

Avaya Analytics™ displays the User Preference page.

4. In the navigation pane, click **Grid display**.

   Avaya Analytics™ displays the Grid display content pane.

5. In the **Maximum columns in grid** field, change the value based on your requirement.

   The maximum value that you can configure in this field is 200.

6. In the **Maximum rows in grid** field, change the value based on your requirement.

   The maximum value that you can configure in this field is 200.

7. Clear the **Automatic page-by** check box.
8. Click **Apply**.
9. Log out and log in again to verify the configured number of columns and rows.
10. **(Optional)** To reset the default options, click **Load Default Values**.

Configuring email addresses

About this task

Use this procedure to configure email addresses in Avaya Analytics™.

Procedure

1. Log on to Avaya Analytics™.
2. On the Home page, click the user account name list in the top-right corner.
3. Click **Preferences**.

   Avaya Analytics™ displays the User Preference page.

4. Under **Preferences** menu in the left navigation panel, click **E-mail Addresses**.
5. On the E-mail Addresses page, click **Add a New Address**.
6. Enter a name and email address in the **Address Name** and **Physical Address** fields, respectively.
7. Select the device from the **Device** list.

   The default value is `Generic email`.

8. Click **Save** to save this email address or **Cancel** to cancel the operation.
9. To edit or delete an existing email address, click **Edit/Delete** corresponding to the email address.
10. To set a default email address, in the **Default** column, select the option corresponding to the email address and click **Set New Default**.

Avaya Analytics™ saves your personal preferences.

Changing the user's password

About this task

Users can change their passwords in the Preferences section after logging in to Avaya Analytics™. Use this procedure to change the password for your user account:

Procedure

1. Log on to Avaya Analytics™.
2. On the Home page, click the user account name list in the top-right corner.
3. Click **Preferences**.

   Avaya Analytics™ displays the User Preference page.
4. Under **Preferences** in the left panel, click **Change Password**.
5. Enter your old password in the **Old password** field.
6. Enter your new password in the **New password** and **New password verification** fields.
7. Click **Change Password**.
8. Log out and log in again with the new password.

Chapter 4: Real-time reports

Real-time reports overview

In an Avaya Oceana®, the Supervisor Reporting Dashboard provides real-time reporting capabilities. Using Avaya Workspaces, supervisors can run real-time reporting dashboards to monitor up-to-date statistics for your contact center and resources. You can view changes in call activity in real-time using the Supervisor Reporting Dashboard. Avaya Analytics™ provides the real-time data for your dashboards. For more information about using the Supervisor Reporting Dashboard, see *Using Avaya Workspaces for Avaya Oceana®*.

For detailed information about realtime measures, data, and reports that Avaya Analytics™ provides, see *Avaya Analytics™ Data Dictionary* available on the Avaya Support website at https://support.avaya.com.

Chapter 5: Managing historical reports

Historical reports overview

The historical dashboard reports display the historical data of the contact center resources, such as agents and the routing services of the various routing service groups. These reports provide a quick view of contact center performance for the specified time interval. You can use these reports as references to evaluate the historical performance of the contact center agents and supervisors. The data helps you to understand progress and performance over time and make informed decisions for the contact center.

Historical reports use interval-based measures to display a snapshot of the contact center. All historical summary and trend reports that return interval-based measures do not include data from the current 15-minute interval until data aggregation is run for the interval. By default, report caching settings are set to 15 minutes. Therefore, you might need to wait up to 30 minutes for the data of the current interval to display in the report.

You can also generate reports for a week, month, or year based on daily roll-up and monthly roll-up data. The daily reports do not include data for the current day because the data is calculated only the next day. The monthly reports do not include data for the current month because the data is calculated the next month.

As supervisor, you can use the Call Profile reports to determine the routing services' call performance in the routing service groups that they are assigned. You can compare the call performance and decide whether you need to plan process improvements.

Note:

The data retention period for these reports is configurable. The maximum data retention period for these reports are:

- 12 months for interval-based data
- 60 months for daily roll-up based data
- 9999 months for monthly roll-up based data

You can configure Routing Service Groups for Historical Reporting in Avaya Analytics™. The default value for Routing Service Groups is **Off**. For more information about configuring Routing Service Groups, see ***Chapter 2: Maintaining Avaya Analytics using the Cluster Control Manager console*** > ***Configuring Routing Service groups for Historical Reporting*** *topic in the Maintaining and Troubleshooting Avaya Analytics for Avaya Oceana guide.*

Historical Reporting offers:

- A web-based reporting application that provides historical reporting through a simplified interface

With this interface, you can visualize the performance of the contact center over a specified reporting time. The interface provides enhanced user experience for report creation.

- Consolidation of historical contact center performance and customer data across the contact center
- Extensive library of tables, graphics, and ready-to-use displays
- Ability to drill-down to granular level information
- Filtering options
- Options to export reports to Excel and PDF formats

  Note:

  HTML data format is currently not supported.
- Ability to schedule reports to run at user-defined intervals
- Ability to schedule reports to run based on daily roll-up and monthly roll-up data
- Options for calculated measures
- Facility for time zone reporting to display data in the preferred time zone
- Multiple predefined reports
- Option to create custom reports or modify reports to meet your business requirements
- Option for advanced users to import data from different data sources to create reports, documents, and dashboards to report on their imported data.
- Option to export web objects for archiving the custom reports during an upgrade.

The historical reports based on interval data available in Avaya Analytics™ are:

- Account By Agent
- Agent By Routing Service
- Agent Configuration
- Agent Login/Logout Report
- Agent Not Ready by Reason Code
- Agent Performance Summary
- Contact Center
- Engagement
- Contact Detail
- Messaging Engagement Summary
- Routing Service
- Supervisor
- Time Series
- VDN

The historical reports based on daily roll-ups available in Avaya Analytics™ are:

- Account By Agent Daily
- Agent By Routing Service Daily
- Agent Not Ready by Reason Code Daily
- Agent Performance Summary Daily
- Contact Center Daily
- Routing Service Daily
- Supervisor Activity Daily
- Time Series Daily
- VDN Summary Daily

The historical reports based on monthly roll-ups available in Avaya Analytics™ are:

- Account By Agent Monthly
- Agent By Routing Service Monthly
- Agent Not Ready by Reason Code Monthly
- Agent Performance Summary Monthly
- Contact Center Monthly
- Routing Service Monthly
- Supervisor Activity Monthly
- Time Series Monthly
- VDN Monthly

Supervisors can use Call Profile reports to view the count of Answered and Abandoned calls. The Call Profile reports are:

- Call Profile Abandoned
- Call Profile Answered
- Call Profile Active Time Duration
- Call Profile Waiting in Queue

For more detailed information about the measures, data, and reports that Avaya Analytics™ provides, see *Avaya Analytics™ Data Dictionary* available from the Avaya Support website at https://support.avaya.com.

Prompts

In Avaya Analytics™, Advanced users can create prompts to apply the following attributes to a document or report:

- Filtering conditions

- A custom group
- A metric

These prompts are available as Shared prompts for Basic users who can then use these prompts in the reports that they create. When you run a document or report after specifying the values in the prompts, Avaya Analytics™ returns data based on the specified values. You can also use a search object in the prompts. A search object searches and displays the specific objects the moment you access the report. You can select your answers from the most up-to-date hierarchies, attributes, metrics, or other objects in a project.

In Avaya Analytics™, the different prompts are:

- Hierarchy qualification prompt: To create customized report filter by using attributes and attribute elements from a specific hierarchy, the hierarchies in the project, or specific hierarchies returned by a search object.
- Attribute qualification prompt: To qualify on the ID, description, and other form of an attribute.
- Attribute element list: To choose from a list of elements. You can use this prompt to create a filter that displays a specific list of attribute elements, based on the condition defined in the filter.
- Metric qualification prompt: To determine how the data in a report is filtered based on one or more specific metrics on the report.
- Object prompt: To select one or more objects, such as attributes, metrics, or filters to include in a report.
- Value prompt: To select a single value, such as a date or a specific text string, and filter report data based on your selection.

Important:

To make the best use of prompts, frame clear descriptions for the prompts so that the users have a clarity on the questions they are answering.

Note:

On standard reports, you can use the **Reprompt** option from the menu in the right pane to reset time or group. The report displays without errors. However, you cannot create reprompts on drilldown reports. If you attempt to do so, Avaya Analytics™ displays a timeout error.

Use the following procedures to create the different prompts and understand when to create the respective prompts in Avaya Analytics™.

Creating hierarchy qualification prompt

About this task

Using a hierarchy qualification prompt, you can create a customized report filter using attributes and attribute elements from:

- A specific hierarchy

  For example, you can select agents with a specific skill from an agent groups hierarchy.

- All hierarchies in the project

  For example, you can select agents with different skills from an agent groups hierarchy.
- Specific hierarchies returned by a search object

Note:

While running a report or document, hierarchical or cascaded prompts remain available in the **Available** list even after moving them to the **Selected** list.

Procedure

1. Log on to Avaya Analytics™.
2. Click **Create** > **New Prompt** > **Hierarchy Qualification Prompt**.
3. On the **Definition** tab, in the **Reduce the number of hierarchies available at run time** area, select one of the following:
   - **All hierarchies**: To choose all hierarchies.
   - **Choose a hierarchy**: To choose a hierarchy from the list, click **Select Hierarchy**, choose a hierarchy from the available list, and click **OK**.
   - **Use a predefined list of hierarchies**: To add the required hierarchies to a predefined list, click **Add**, move the required hierarchies from the available list to the selected list, and click **OK**.
   - **Use the result of a search object**: To use the search object results to choose the hierarchies, click **Select Search**.
4. On the **General** tab, do the following:
   a. In the **Title** field, type the title.
   b. In the **Instructions** field, type the instructions for the hierarchy qualification prompt.
   c. If the user input is mandatory, select **Prompt answer is required** check box.
   d. To define the minimum number of qualifications, select **Minimum number of qualifications** check box and type the minimum number.
   e. To define the maximum number of qualifications, select **Maximum number of qualifications** check box and type the maximum number.
   f. To save a specific answer as a default prompt, in the **Personal answers allowed** field, click **Single** or **Multiple**.

   If you select **Single**, you can save one personal prompt answer.

   If you select **Multiple**, you can save multiple answers for different situations.
5. On the **Style** tab, select the required style specifications.
6. On the **Qualification** tab, select the required expressions and conditions.
7. Click the **Save** icon.

   The Save As dialog box opens.

8. In the **Name** field, type a name for the prompt.
9. In the **Description** field, type the description for the prompt.
10. Navigate to the appropriate location, and click **OK**.

Creating an attribute qualification prompt

About this task

With an attribute qualification prompt, you can qualify on the ID, description, and other form of an attribute. You can use an attribute qualification prompt when you want to prompt on a specific attribute form. For example, if your report contains the attribute Channel, then you can create an attribute qualification prompt, which prompts you to choose attribute elements from the Channel attribute, such as voice, message, and chat.

Note:

This prompt is more restrictive than the hierarchy qualification prompt because the user has fewer attribute elements to select answers.

Procedure

1. Log on to Avaya Analytics™.
2. Click **Create** > **New Prompt** > **Attribute Qualification Prompt**.
3. On the **Definition** tab, select one of the following:
    a. **Choose an attribute**: To choose an attribute from the list, click **Select Attribute**, choose the attribute, and click **OK**.
    b. **Use a predefined list of attributes**: To add the required attributes to a predefined list, click **Add**, move the required attributes from the available list to the selected list, and click **OK**.
    c. **Use the result of a search object**: To use the search object results to choose the attributes, click **Select Search**.
4. On the **General** tab, do the following:
    a. In the **Title** field, type the title.
    b. In the **Instructions** field, type the instructions for the attribute qualification.
    c. If the user input is mandatory, select the **Prompt answer is required** check box.
    d. To define the minimum number of qualifications, select the **Minimum number of qualifications** check box and type the minimum number.
    e. To define the maximum number of qualifications, select the **Maximum number of qualifications** check box and type the maximum number.
    f. To save a specific answer as a default prompt, in the **Personal answers allowed** field, click **Single** or **Multiple**.

    If you select **Single**, you can save one personal prompt answer.

    If you select **Multiple**, you can save multiple answers for different situations.

5. On the **Style** tab, select the required style specifications.
6. On the **Qualification** tab, select the required expressions and conditions.
7. Click the **Save** icon.

   The Save As dialog box opens.
8. In the **Name** field, type a name for the prompt.
9. In the **Description** field, type the description for the prompt.
10. Navigate to the appropriate location, and click **OK**.

Creating an attribute element list

About this task

With the attribute element list prompt, you can choose from a list of elements. This prompt is the most restrictive of the filter definition prompts because you have a limited number of attribute elements to select answers. For example, you can define a prompt to choose the list of elements in a month.

Important:

- Use attribute qualification prompt to select prompt answers from a list of attribute elements from a single attribute.
- Use attribute element list to select prompt answers from a limited list of the specific attribute elements.

Procedure

1. Log on to Avaya Analytics™.
2. Click **Create** > **New Prompt** > **Attribute Element List**.
3. On the **Definition** tab, do the following:
   a. **Specify the attribute**: To specify an attribute, click **Select Attribute**, choose an attribute from the list, and click **OK**.
   b. In the **Define Elements** section, choose one of the following:
      - **List all elements (no restriction)**: To choose all elements.
      - **Use a predefined list of elements**: To add the required attributes elements to a predefined list, click **Add**, move the required elements from the available list to the selected list, and click **OK**.
      - **Use a filter to reduce the number of elements**: To use the filter to restrict the number of elements, click **Select Filter**.
4. On the **General** tab, do the following:
   a. In the **Title** field, type the title.
   b. In the **Instructions** field, type the instructions for the elements.
   c. If the user input is mandatory, select **Prompt answer is required** check box.

d. To define the minimum number of qualifications, select **Minimum number of answers** check box and type the minimum number.

e. To define the maximum number of qualifications, select **Maximum number of answers** check box and type the maximum number.

f. To select a default answer, in the **Personal answers allowed** field, click **Single** or **Multiple**.

If you select **Single**, you can save one personal prompt answer.

If you select **Multiple**, you can save multiple answers for different situations.

5. On the **Style** tab, select the required style specifications.
6. Click the **Save** icon.

   The Save As dialog box opens.
7. In the **Name** field, type a name for the prompt.
8. In the **Description** field, type the description for the prompt.
9. Navigate to the appropriate location, and click **OK**.

Creating a metric qualification prompt

About this task

With a metric qualification prompt, you can qualify on one or more metrics to determine how the report data is filtered based on metrics.

Procedure

1. Log on to Avaya Analytics™.
2. Click **Create** > **New Prompt** > **Metric Qualification Prompt**.
3. On the **Definition** tab, to **Choose a metric or a metric search object**, select one of the following:
   a. **Choose a metric**: To choose a metric from the list, click **Select Metric**, choose a metric from the available list, and click **OK**.
   b. **Use a predefined list of metrics**: To add the required metrics to a predefined list, click **Add**, move the required metrics from the available list to the selected list, and click **OK**.
   c. **Use the result of a search object**: To use the search object results to choose the metrics, click **Select Search**.
4. On the **General** tab, do the following:
   a. In the **Title** field, type the title.
   b. In the **Instructions** field, type the instructions for the metrics qualification.
   c. If the user input is mandatory, select **Prompt answer required** check box.
   d. To define the minimum number of qualifications, select **Minimum number of qualifications** check box and type the minimum number.

   e. To define the maximum number of qualifications, select **Maximum number of qualifications** check box and type the maximum number.

5. On the **Style** tab, select the required style specifications.
6. On the **Qualification** tab, select the required expressions and conditions.
7. Click the **Save** icon.

   The Save As dialog box opens.
8. In the **Name** field, type a name for the prompt.
9. In the **Description** field, type the description for the prompt.
10. Navigate to the appropriate location, and click **OK**.

Creating object prompt

About this task

In Avaya Analytics™, you can use object prompts to select one or more objects to include in a report. Objects here refer to attributes, metrics, or filters. You can also choose from a selection of filters to apply a filter that is important for detailed analysis. For example, you can create a prompt that displays the day, month, and year attributes to specify the granularity of the report.

Important:

- Use object prompts to add more data to a report.
- Use attribute qualification prompts to select prompt answers from a list of attribute elements from a single attribute.

Procedure

1. Log on to Avaya Analytics™.
2. Click **Create** > **New Prompt** > **Object Prompt**.
3. On the **Definition** tab, in the **List of objects to display** section, select one of the following:
   a. **Use a predefined list of objects**: To add the required objects to a predefined list, click **Add**, move the required objects from the available list to the selected list, and click **OK**.
   b. **Use the result of a search object**: To use the search object results to choose the objects, click **Select Search**.
4. On the **General** tab, do the following:
   a. In the **Title** field, type the title.
   b. In the **Instructions** field, type the instructions for the object prompt.
   c. If the user input is mandatory, select **Prompt answer required** check box.
   d. To define the minimum number of qualifications, select **Minimum number of answers** check box and type the minimum number.

   e. To define the maximum number of qualifications, select **Maximum number of answers** check box and type the maximum number.
   f. To create default personal answers, in the **Personal answers allowed** field, click **Single** or **Multiple**.

      If you select **Single**, you can save one personal prompt answer.

      If you select **Multiple**, you can save multiple answers for different situations.
5. On the **Style** tab, select the required style specifications.
6. Click the **Save** icon.

   The Save As dialog box opens.
7. In the **Name** field, type a name for the prompt.
8. In the **Description** field, type the description for the prompt.
9. Navigate to the appropriate location, and click **OK**.

Creating a value prompt

About this task

With a value prompt, users can enter a text, date, number, or other value types.

Procedure

1. Log on to Avaya Analytics™.
2. Click **Create** > **New Prompt** > **Value Prompt**.
3. On the **Definition** tab, to **Choose the value prompt type**, select one of the following:
   a. **Date & Time prompt**
   b. **Numeric prompt**
   c. **Text prompt**
   d. **Big Decimal prompt**
4. On the **General** tab, do the following:
   a. In the **Title** field, type the title.
   b. In the **Instructions** field, type the instructions for the prompt.
   c. If the user input is mandatory, select the **Prompt answer required** check box.
   d. To define the minimum number of answers:
      - For Date & Time, Numeric, or Big Decimal prompt types, select the **Minimum value** check box and type the minimum number.
      - For a Text prompt type, select the **Minimum number of characters** check box and type the minimum number.

e. To define the maximum number of answers:
   - For Date & Time, Numeric, or Big Decimal prompt types, select the **Maximum value** check box and type the maximum number.
   - For a Text prompt type, select the **Maximum number of characters** check box and type the maximum number.

5. On the **Style** tab, select the required style specifications.
6. Click the **Save** icon.

   The Save As dialog box opens.
7. In the **Name** field, type a name for the prompt.
8. In the **Description** field, type the description for the prompt.
9. Navigate to the appropriate location, and click **OK**.

Creating a filter for attributes and metrics

About this task

In Avaya Analytics™, Advanced users can use the following procedure to create a filter for attributes and metrics to limit the data returned by a query.

Procedure

1. Log on to Avaya Analytics™.
2. Click **Create** > **New filter**.
3. To apply a filter on attributes, do the following:
   a. In the navigation pane, click **Attributes** and double-click the attribute for which you want to create a filter.
   b. To qualify, click **Qualify**, choose the operator from the drop-down, enter a value or attribute, and click **Apply**.
   c. To apply filters on lists, click **Select**, move the required parameters from **Available** to the **Selected** list, and click **Apply**.
4. To apply a filter on metrics, do the following:
   a. In the navigation pane, click **Metrics** and double-click the metrics for which you want to create a filter.
   b. Choose the operator from the drop-down, enter a value or metric, and click **Apply**.
5. Click **Save** and navigate to the appropriate location, name the file, and click **OK**.

Creating a custom group

About this task

In Avaya Analytics™, Advanced users can create a custom group to segment data. Use the following procedure to create a custom group:

Procedure

1. Log on to Avaya Analytics™.
2. Click **Create** > **New Custom Group**.

   The Custom Group Editor page opens.
3. To enter a name for the new custom group, click **Enter Custom Group name here**.
4. To enter a description for the custom group, click **Enter Custom Group description here**.
5. To add an element, do the following:
   a. Click **+ New custom group element**.

      The Condition Editor window opens.
   b. Click **Browse**. Select the required attribute or metric and the conditions.
   c. Click **OK**.

   Repeat step 5 to add more elements to the custom group.
6. Click **Save**.

Creating a new report

About this task

Use this procedure to create a new report so that you can request for a specific set of formatted data from your data source.

Procedure

1. Log on to Avaya Analytics™.
2. Click **Create** > **New Report**.
3. Click **Blank Report**.

   An empty report opens on which you can place various data objects to build a report.
4. From the **ALL OBJECTS** drop-down, select `Avaya Analytics`.
5. Click **Objects** > **Avaya Analytics**.
6. To add an attribute or metric to a report, expand the sub folders and then double-click or drag and drop to the report.

Attributes are placed on the rows of a report and metrics are placed on the columns of a report.

7. To add a filter to a report, expand the **Filters** sub folder and then drag and drop the filter to the REPORT FILTER area.
8. To add a prompt to a report, expand the **Prompts** sub folder and then drag and drop the prompt to the REPORT FILTER area.

   Note:

   - For more information on attributes, filters, prompts, and metrics, see *Avaya Analytics™ Data Dictionary*.
   - If you create a report by using attributes and metrics from mismatched folders, you might experience incompatibility issues.
9. Click the **Run Report** icon at the top of the page.

   You can view the report in the **Grid**, **Graph**, or **Grid and Graph** view.
10. **(Optional)** To add more attributes, metrics, prompts, and filters to the report, click **Edit** to return to Design Mode and make your changes.
11. Click **Save As**.

    The Save As dialog box opens.
12. In the **Save in** field, select the location where you want to store the report.
13. In the **Name** field, type a name for the report.
14. In the **Description** field, type the description for the report.
15. Click **OK**.

    Avaya Analytics™ displays the following message:

    `<Report Name> has been saved successfully.`
16. Click one of the following options based on your requirement:
    - **Return to Design Mode**
    - **Run newly saved report**

    Note:

    The newly created report can be used as a dataset for other documents.

Creating a new document

About this task

Use this procedure to create a new document to view your organization’s data in a format similar to a Power Point presentation.

Procedure

1. Log on to Avaya Analytics™.
2. Click **Create** > **New Document**.

   Avaya Analytics™ displays the Dashboard-style Templates and the Document Templates
3. To select a new document with predefined sections, click one of the dashboard-style templates.

   For example, if you select the Two Titles and Two Contents template, Avaya Analytics™ creates a template with 4 panels, one for titles and the other for content.
4. In the Document Templates section, click **Blank Document**.

   Avaya Analytics™ creates a document in design mode.
5. Import a layout from an existing document.
6. Add a dataset to a document.
7. Add objects to a document.
8. Add a report to a document.
9. Click the **Save** icon.

   The Save As dialog box opens.
10. In the **Name** field, type a name for the document.
11. In the **Description** field, type the description for the document.
12. Navigate to the appropriate location and click **OK**.

Importing a layout to a document

About this task

Use this procedure to import a layout from an existing document.

Procedure

1. Log on to Avaya Analytics™.
2. Click **Create** > **New Document**.
3. Click **Blank Document**.

   A new document opens in Design Mode.
4. Click **Tools** > **Import Document**.
5. Browse to select the required document to use the layout.
6. Click **OK**.

   The selected layout is applied to the document.

Adding a dataset to a document

About this task

Use this procedure to add a dataset to a blank document.

Procedure

1. Log on to Avaya Analytics™.
2. Click **Create** > **New Document**.
3. Click **Blank Document**.

   A new document opens in Design Mode.
4. Click **Data** > **Add dataset**.

   The Select Dataset dialog box opens.
5. Browse to select the required report to use as a dataset.

   You can select one or more datasets.
6. To locate a specific dataset, type a name in the **Find** field.
7. Click **OK**.

   The selected dataset and its objects are displayed in the **DATASET OBJECTS** panel.

   Note:

   For more information on attributes, filters, prompts, and metrics, see *Avaya Analytics™ Data Dictionary*.

Adding objects to a document

About this task

Use this procedure to add a dataset to a blank document.

Procedure

1. Log on to Avaya Analytics™.
2. Click **Create** > **New Document**.
3. Click **Blank Document**.

   A new document opens in Design Mode.
4. Click **Tools** > **DOCUMENT STRUCTURE**.
5. Click the **Insert** menu tab.
6. Click the object you require and then click on the section where you want to place the selected object.
7. Repeat Step 6 to add more objects to the document.

   The selected objects are displayed in the **DOCUMENT STRUCTURE** panel.

Adding a report to a document

About this task

Use this procedure to add a report to a document.

Procedure

1. Log on to Avaya Analytics™.
2. Click **Create** > **New Document**.
3. Click **Blank Document**.

   A new document opens in Design Mode.
4. Click **Tools** > **DOCUMENT STRUCTURE**.
5. Click the **Insert** menu tab.
6. To create a grid, click **Grid** and then click the section where you want to place the report.
7. To create a graph, point to **Graph** and select the graph type.
8. Add dataset objects to an empty Grid or Graph.

Creating a dossier

About this task

Use this procedure to create a dossier, which is an interactive display of call profile information of your organization.

Procedure

1. Log on to Avaya Analytics™.
2. Click **Create** > **New Dossier**.

   The created dossier displays a single blank visualization.
3. You can add data to the dossier in any of the following ways:
   - **New data**: To import data from your local machine.
   - **Existing data**: To select a dataset from one of the connected databases.
   - **Existing Objects**: To create a new dataset using attributes and metrics available on one of the connected environments.

   The selected data is added to your dossier as a dataset.
4. To add a visual representation of your data, do the following:
   - Click the graph style of your choice from the available styles on the right-hand side.
   - Double-click the attributes and metrics to display the data using the graph style that you have chosen.

- Select additional display options, such as size or color graph items based on attributes or metric values.

5. Click **Save**.

Customizing the layout of a document

About this task

You can customize the layout of a report or a document based on your business requirements.

Procedure

1. Log on to Avaya Analytics™.
2. On the Home page, in the navigation pane, click **Shared Reports**.
3. In the content pane, click **Standard Historical Reports**.

   Avaya Analytics™ displays the Standard Historical Reports page.
4. For documents based on interval data, do the following:
   a. Click the required document.

      To choose an appropriate document from the list of the available documents, see Standard Historical Reports page field descriptions on page 20.
   b. On the input prompts, specify the values.

      For information about input prompts, see Input prompts on page 54.
5. For documents based on daily roll-up data, do the following:
   a. Click **Daily**.
   b. Click the document.

      To choose an appropriate document from the list of the available documents, see Daily page field descriptions on page 23.
   c. On the input prompts, specify the values.

      For information about input prompts, see Input prompts on page 59.
6. For documents based on monthly roll-up data, do the following:
   a. Click **Monthly**.
   b. Click the document.

      To choose an appropriate document from the list of the available documents, see Monthly page field descriptions on page 24.
   c. On the input prompts, specify the values.

      For information about input prompts, see Input prompts on page 63.
7. Click **Run Document**.

Avaya Analytics™ displays the report summary page based on the values specified in the input prompts.

8. On the report page, click the hamburger icon (▤) and click **Edit**.

   The DOCUMENT STRUCTURE page opens with options to edit the following parts of the report structure in the left panel:

   - Page Header
   - Layout Header
   - Detail Header
   - Detail
   - Body
   - Detail Footer
   - Layout Footer
   - Page Footer
9. Drag and drop the text boxes, report graphics, drop-down structures to customize the report layout based on your business requirements.
10. To add more metrics or attributes to the existing document, drag and drop the attributes or metrics from the **DATASET OBJECTS** folder to the grid report in the document.
11. If a metric or attribute is not available in the current dataset, do the following:
    a. Right-click the dataset name and click **Replace Dataset**.

       Avaya Analytics™ displays the **Select Dataset** dialog box.

    b. Select the dataset from Avaya Analytics™ or an external location.

    c. **(Optional)** To select the dataset from Avaya Analytics™, click the **Select your dataset report below** drop-down and select the required dataset.

    d. **(Optional)** To select the dataset from an external location, click **Add External Data** and select the dataset.

    e. Click **OK**.

       Avaya Analytics™ displays the **Replace Objects** dialog box.

    f. Replace or remove attributes or metrics that are currently used in the document.

    g. Click **OK**.

    h. Drag and drop the attributes or metrics from the **DATASET OBJECTS** folder to the grid report in the document.
12. Click **DOCUMENT HOME** > **Save As**.

    Avaya Analytics™ displays the Save As dialog box.
13. In the **Save in** field, select **My Reports**.

14. In the **Name** field, type a name for the report.
15. In the **Description** field, type a short description of the report.
16. In the **Advanced** field, select one of the following prompts based on your requirements:
    - **Display prompt and use the current answers as the default answers**
    - **Display prompt but discard the current answers**
    - **Do not display prompt and use the current answers as the default answers**
17. Click **OK**.

Modifying an existing Avaya Analytics™ canned document

Procedure

1. Log on to Avaya Analytics™.
2. On the Home page, in the navigation pane, click **Shared Reports**.
3. In the content pane, click **Standard Historical Reports**.

   Avaya Analytics™ displays the Standard Historical Reports page.
4. For documents based on interval data, do the following:
   a. Click the required document.

      To choose an appropriate document from the list of the available documents, see Standard Historical Reports page field descriptions on page 20.
   b. On the input prompts, specify the values.

      For information about input prompts, see Input prompts on page 54.
5. For documents based on daily roll-up data, do the following:
   a. Click **Daily**.
   b. Click the document.

      To choose an appropriate document from the list of the available documents, see Daily page field descriptions on page 23.
   c. On the input prompts, specify the values.

      For information about input prompts, see Input prompts on page 59.
6. For documents based on monthly roll-up data, do the following:
   a. Click **Monthly**.
   b. Click the document.

      To choose an appropriate document from the list of the available documents, see Monthly page field descriptions on page 24.

c. On the input prompts, specify the values.

For information about input prompts, see Input prompts on page 63.

7. For dossiers based on Call Profile reports, do the following:
   a. Click **Call Profile**.
   b. Click one of the four Call Profile reports.
      - Call Profile Abandoned
      - Call Profile Active Time Duration
      - Call Profile Answered
      - Call Profile Waiting in Queue
   c. On the input prompts, specify the values.

      For information about input prompts, see Input prompts on page 72.
8. Click **Run Document**.

   If you are working on Call Profile reports, click **Run Dossier**.

   Avaya Analytics™ displays the document based on the input prompts.
9. On the document page, click the hamburger icon (☰) and click **Run as Editable Mode**.

   If you are working on a Call Profile report, in the left pane, click the **Click to Open Editor Panel** icon.
10. To modify the document, on the left-bottom panel, you can perform the following actions:
    - **DATASET OBJECTS**: Drag and drop the attributes, metrics, and modify the document layout.

      Note:

      For more information on attributes, filters, prompts and metrics, see *Avaya Analytics™ Data Dictionary*.
    - **DOCUMENT STRUCTURE**: You can modify the page header, layout header, detail header, detail, body, detail footer, layout footer, and page footer of the report structure.
    - **NOTES**: You can add your own notes or comments to the report.
    - **RELATED REPORTS**: You can view the links to the other reports and documents present in the same folder.
11. Click **Save**.

Customizing an existing report

About this task

Using the Report Editor you can create, customize, and save reports.

Procedure

1. Log on to Avaya Analytics™.
2. Navigate to the report you want to customize.
3. You can navigate to the Report Editor in two ways:
   - Move the cursor on the report and click **Edit**.
   - Run the report and click the Design () icon .

   The Report Editor opens a report in Design Mode.
4. In the navigation pane, click **ALL OBJECTS**.
5. From the **ALL OBJECTS** drop-down, select `Avaya Analytics`.
6. Click **Objects** > **Avaya Analytics**.
7. To add an attribute or metric to a report, expand the sub folders and then double-click or drag and drop to the report.

   Attributes are placed on the rows of a report and metrics are placed on the columns of a report.
8. To remove an attribute or metric, remove it from the grid.
9. To add a filter to a report, expand the **Filters** sub folder and then drag and drop the filter to the REPORT FILTER area.
10. To add a prompt to a report, expand the **Prompts** sub folder and then drag and drop the prompt to the REPORT FILTER area.

    Note:

    For more information on attributes, filters, prompts, and metrics, see *Avaya Analytics™ Data Dictionary*.
11. To remove a filter or prompt, remove it from the REPORT FILTER area.
12. Click the **Run Report** icon at the top of the page.

    You can view the report in the **Grid**, **Graph**, or **Grid and Graph** view.
13. **(Optional)** To add more attributes, metrics, prompts, and filters to the report, click **Edit** to return to Design Mode and make your changes.
14. Click **Save As**.

    The Save As dialog box opens.
15. In the **Save in** field, select the location where you want to store the report.

    You must save custom reports in the custom folder or My Reports folder.
16. In the **Name** field, type a name for the report.
17. In the **Description** field, type the description for the report.
18. Click **OK**.

Avaya Analytics™ displays the following message:

`<Report Name> has been saved successfully.`

19. Click one of the following options based on your requirement:
    - **Return to Design Mode**
    - **Run newly saved report**

    Note:

    The newly created report can be used as a dataset for other documents.

Viewing a report based on interval data

About this task

Use this procedure to generate and view a report that uses interval-based measures. These reports do not include data from the current 15-minute interval until you run data aggregation for the interval. By default, report caching settings are set to 15 minutes.

Important:

To run a report, you must only use Supervisor credentials.

Procedure

1. Log on to Avaya Analytics™.
2. On the Home page, in the navigation pane, click **Shared Reports**.
3. In the content pane, click **Standard Historical Reports**.

   Avaya Analytics™ displays the Standard Historical Reports page.
4. On the Standard Historical Reports page, click **Reports**.
5. On the Reports page, click a report.

   For the list of available reports, see Reports page field descriptions on page 21.
6. On the input prompts, specify the values.

   For information about input prompts, see Input prompts on page 54.
7. Click **Run Report**.

   Avaya Analytics™ generates the report based on the input prompts.
8. In the report, drill-down the required measure to obtain information about the measure.

   Note:

   You can drill down only those measures in the reports that are underlined.

Input prompts

The attributes in the following tables list out attributes for the following interval data: Interval, Date, Week, Month, and Year. These tables list the input prompts that you use to run a document or report:

Account By Agent

Name	Description
Timezone	The timezone for displaying results on the document or report.
Time Filter	The attributes to define the duration for displaying results on the document or report.
Agent Group-Agent-Supervisor	The agent groups with agents and their supervisor. To filter results on the document or report, you can move the required agent groups, agents, and supervisors from the **Available** list to the **Selected** list. By default, the **Search for** field is disabled for this prompt. However, this field gets enabled on attribute selection.

Agent By Routing Service

Name	Description
Timezone	The timezone for displaying results on the document or report.
Time Filter	The attributes to define the duration for displaying results on the document or report.
Routing Service Group - Routing Service Name	The name of the routing service in a routing service group that is used to route this contact to the agent. To filter results on the document or report, you can move the required routing service or routing service group from the **Available** list to the **Selected** list. By default, the **Search for field** option is disabled for this prompt. However, this field gets enabled when you select the attribute.

Agent Configuration

Name	Description
Agent Group-Agent-Supervisor	The agent groups with agents and their supervisor. To filter results on the document or report, you can move the required agent groups, agents, and supervisors from the **Available** list to the **Selected** list. By default, the **Search for** field is disabled for this prompt. However, this field gets enabled on attribute selection.

Agent Login/Logout

Name	Description
Timezone	The timezone for displaying results on document or report.
Time Filter	The attributes to define the duration for displaying results on the document or report.
Agent Group-Agent	The agent groups with agents. To filter results on the document or report, you can move the required agent groups and agents from the **Available** list to the **Selected** list. By default, the **Search for** field is disabled for this prompt. However, this field gets enabled on attribute selection.
Supervisor ID: Supervisor Name	The name and ID of supervisors. To filter results on the document or report, you can move the required supervisors from the **Available** list to the **Selected** list.

Agent Not Ready By Reason Code

Name	Description
Timezone	The timezone for displaying results on the document or report.
Time Filter	The attributes to define the duration for displaying results on the document or report.
Agent Group-Agent	The agent groups with agents. To filter results on the document or report, you can move the required agent groups and agents from the **Available** list to the **Selected** list. By default, the **Search for** field is disabled for this prompt. However, this field gets enabled on attribute selection.
Not Ready Reason Code	The ID of the Not Ready Reason Code (Aux Code).To filter results on the document or report, you can move the required IDs from the **Available** list to the **Selected** list.

Agent Performance Summary

Name	Description
Timezone	The timezone for displaying results on the document or report.
Time Filter	The attributes to define the duration for displaying results on the document or report.

Table continues…

Name	Description
Agent Group-Agent-Supervisor	The agent groups with agents and their supervisor. To filter results on the document or report, you can move the required agent groups, agents, and supervisors from the **Available** list to the **Selected** list. By default, the **Search for** field is disabled for this prompt. However, this field gets enabled on attribute selection.

Contact Center

Name	Description
Timezone	The timezone for displaying results on the document or report.
Time Filter	The attributes to define the duration for displaying results on the document or report.

Engagement

Name	Description
Timezone	The timezone for displaying results on the document or report.
Start Date	The start date for displaying results on the document or report.
End Date	The end date for displaying results on the document or report.
Channel ID	The channel ID of the engagement.
Engagement ID	The source system ID to uniquely identify the engagement.

Messaging Engagement Summary Report

Name	Description
Timezone	The timezone for displaying results on the document or report.
Start Date	The start date for displaying results on the document or report.
End Date	The end date for displaying results on the document or report.

Routing Service

Name	Description
Timezone	The timezone for displaying results on the document or report.

Table continues…

Name	Description
Time Filter	The attributes to define the duration for displaying results on the document or report.
Routing Service Group - Routing Service Name	The name of the routing service in a routing service group that is used to route this contact to the agent. To filter results on the document or report, you can move the required routing service or routing service group from the **Available** list to the **Selected** list. By default, the **Search for field** option is disabled for this prompt. However, this field gets enabled when you select the attribute.

Supervisor

Name	Description
Timezone	The timezone for displaying results on the document or report.
Time Filter	The attributes to define the duration for displaying results on the document or report.
Supervisor ID: Supervisor Name	The name and ID of supervisors. To filter results on the document or report, you can move the required supervisors from the **Available** list to the **Selected** list.

Time Series

Name	Description
Timezone	The timezone for displaying results on the document or report.
Time Filter	The attributes to define the duration for displaying results on the document or report.

VDN Summary

Name	Description
Timezone	The timezone for displaying results on the document or report.
Time Filter	The attributes to define the duration for displaying results on the document or report.
Routing Point ID: Routing Point Name	The name and ID of routing points. To filter results on the document or report, you can move the required routing points from the **Available** list to the **Selected** list.

Note:

While running a report or document, hierarchical or cascaded prompts such as Agent Group-Agent-Supervisor remain available in the **Available** list even after moving them to the **Selected** list.

Input prompts page buttons

The following table lists the buttons on the input prompts page of each document:

Button	Description
Run Document	To generate the document.
Cancel	To cancel generating the document.

Report summary page controls

The following actions are available on the report summary page depending on your permissions:

Action	Description
Save	To save a copy of the report.
Add to History List	To send a report to the History List, to be saved for future reference.
Create Personal View	To create and save a personal view of the report generated on a given date and time.
Share	To share the report generated through an email link or embedded report links in a web page.
Send Now	To send a report to any email address.
Export	To export the report in the required export format. For example, Excel and PDF data formats. **Note:** HTML data format is currently not supported.
Print	To print the report using Adobe Portable Document Format (PDF).
Full Screen Mode	To view the report summary page on the full screen.

Viewing a report based on daily roll-up data

About this task

Use this procedure to generate and view a report based on daily roll-up data. These reports do not include data for the current day because the data is calculated only the next day.

Important:

To run a report, you must only use Supervisor credentials.

Procedure

1. Log on to Avaya Analytics™.
2. On the Home page, in the navigation pane, click **Shared Reports**.
3. In the content pane, click **Standard Historical Reports**.

Avaya Analytics™ displays the Standard Historical Reports page.

4. Click **Daily** > **Reports**.
5. On the Reports page, click a report.

   For a list of available reports, see Reports page field descriptions on page 24.
6. On the input prompts, specify the values.

   For information about input prompts, see Input prompts on page 59.
7. Click **Run Report**.

   Avaya Analytics™ generates the report based on the input prompts.

Input prompts

The following tables list the input prompts that you use to run a document or report based on daily roll-up tables:

Account By Agent Daily

Name	Description
Timezone	The timezone for displaying results on the document or report.
Date Filter	The attributes to define the duration for displaying results on the document or report.
Agent Group-Agent-Supervisor	The agent groups with agents and their supervisor. To filter results on the document or report, you can move the required agent groups, agents, and supervisors from the **Available** list to the **Selected** list. By default, the **Search for** field is disabled for this prompt. However, this field gets enabled on attribute selection.

Agent By Routing Service Daily

Name	Description
Timezone	The timezone for displaying results on the document or report.
Date Filter	The attributes to define the duration for displaying results on the document or report.
Routing Service Group - Routing Service Name	The name of the routing service in a routing service group that is used to route this contact to the agent. To filter results on the document or report, you can move the required routing service or routing service group from the **Available** list to the **Selected** list. By default, the **Search for field** option is disabled for this prompt. However, this field gets enabled when you select the attribute.

Agent Not Ready By Reason Code Daily

Name	Description
Timezone	The timezone for displaying results on the document or report.
Date Filter	The attributes to define the duration for displaying results on the document or report.
Agent Group-Agent	The agent groups with agents. To filter results on the document or report, you can move the required agent groups and agents from the **Available** list to the **Selected** list. By default, the **Search for** field is disabled for this prompt. However, this field gets enabled on attribute selection.
Not Ready Reason Code	The ID of the Not Ready Reason Code (Aux Code).To filter results on the document or report, you can move the required IDs from the **Available** list to the **Selected** list.

Agent Performance Summary Daily

Name	Description
Timezone	The timezone for displaying results on the document or report.
Date Filter	The attributes to define the duration for displaying results on the document or report.
Agent Group-Agent	The agent groups with agents. To filter results on the document or report, you can move the required agent groups, agents, and supervisors from the **Available** list to the **Selected** list. By default, the **Search for** field is disabled for this prompt. However, this field gets enabled on attribute selection.

Contact Center Daily

Name	Description
Timezone	The timezone for displaying results on the document or report.
Date Filter	The attributes to define the duration for displaying results on the document or report.

Routing Service Daily

Name	Description
Timezone	The timezone for displaying results on the document or report.
Date Filter	The attributes to define the duration for displaying results on the document or report.
Routing Service Group - Routing Service Name	The agent groups with agents. To filter results on the document or report, you can move the required agent groups, agents, and supervisors from the **Available** list to the **Selected** list. By default, the **Search for** field is disabled for this prompt. However, this field gets enabled on attribute selection.

Supervisor Daily

Name	Description
Timezone	The timezone for displaying results on the document or report.
Date Filter	The attributes to define the duration for displaying results on the document or report.

Time Series Daily

Name	Description
Timezone	The timezone for displaying results on the document or report.
Date Filter	The attributes to define the duration for displaying results on the document or report.

VDN Summary Daily

Name	Description
Timezone	The timezone for displaying results on the document or report.
Date Filter	The attributes to define the duration for displaying results on the document or report.
Routing Point ID: Routing Point Name	The name and ID of routing points. To filter results on the document or report, you can move the required routing points from the **Available** list to the **Selected** list. By default, the **Search for field** option is disabled for this prompt. However, this field gets enabled when you select the attribute.

Note:

While running a report or document, hierarchical or cascaded prompts such as Agent Group-Agent remain available in the **Available** list even after moving them to the **Selected** list.

Input prompts page buttons

The following table lists the buttons on the input prompts page of each document:

Button	Description
Run Document	To generate the document.
Cancel	To cancel generating the document.

Report summary page controls

The following actions are available on the report summary page depending on your permissions:

Action	Description
Save	To save a copy of the report.
Add to History List	To send a report to the History List, to be saved for future reference.
Create Personal View	To create and save a personal view of the report generated on a given date and time.
Share	To share the report generated through an email link or embedded report links in a web page.
Send Now	To send a report to any email address.
Export	To export the report in the required export format. For example, Excel and PDF data formats. **Note:** HTML data format is currently not supported.
Print	To print the report using Adobe Portable Document Format (PDF).
Full Screen Mode	To view the report summary page on the full screen.

Viewing a report based on monthly roll-up data

About this task

Use this procedure to generate and view a report based on daily roll-up data. These reports do not include data for the current month because the data is calculated only the next month.

Important:

To run a report, you must only use Supervisor credentials.

Procedure

1. Log on to Avaya Analytics™.
2. On the Home page, in the navigation pane, click **Shared Reports**.
3. In the content pane, click **Standard Historical Reports**.

Avaya Analytics™ displays the Standard Historical Reports page.

4. Click **Monthly** > **Reports**.
5. On the Reports page, click a report.

   For a list of available reports, see Reports page field descriptions on page 25.
6. On the input prompts, specify the values.

   For information about input prompts, see Input prompts on page 63.
7. Click **Run Report**.

   Avaya Analytics™ generates the report based on the input prompts.

Input prompts

The following tables list the input prompts that you use to run a document or report based on monthly roll-up tables:

Account By Agent Monthly

Name	Description
Timezone	The timezone for displaying results on the document or report.
Date Filter	The attributes to define the duration for displaying results on the document or report.
Agent Group-Agent-Supervisor	The agent groups with agents and their supervisor. To filter results on the document or report, you can move the required agent groups, agents, and supervisors from the **Available** list to the **Selected** list. By default, the **Search for** field is disabled for this prompt. However, this field gets enabled on attribute selection.

Agent By Routing Service Monthly

Name	Description
Timezone	The timezone for displaying results on the document or report.
Date Filter	The attributes to define the duration for displaying results on the document or report.
Routing Service Group - Routing Service Name	The name of the routing service in a routing service group that is used to route this contact to the agent. To filter results on the document or report, you can move the required routing service or routing service group from the **Available** list to the **Selected** list. By default, the **Search for field** option is disabled for this prompt. However, this field gets enabled when you select the attribute.

Agent Not Ready By Reason Code Monthly

Name	Description
Timezone	The timezone for displaying results on the document or report.
Date Filter	The attributes to define the duration for displaying results on the document or report.
Agent Group-Agent	The agent groups with agents. To filter results on the document or report, you can move the required agent groups and agents from the **Available** list to the **Selected** list. By default, the **Search for** field is disabled for this prompt. However, this field gets enabled on attribute selection.
Not Ready Reason Code	The ID of the Not Ready Reason Code (Aux Code).To filter results on the document or report, you can move the required IDs from the **Available** list to the **Selected** list.

Agent Performance Summary Monthly

Name	Description
Timezone	The timezone for displaying results on the document or report.
Date Filter	The attributes to define the duration for displaying results on the document or report.
Agent Group-Agent	The agent groups with agents. To filter results on the document or report, you can move the required agent groups, agents, and supervisors from the **Available** list to the **Selected** list. By default, the **Search for** field is disabled for this prompt. However, this field gets enabled on attribute selection.

Contact Center Monthly

Name	Description
Timezone	The timezone for displaying results on the document or report.
Date Filter	The attributes to define the duration for displaying results on the document or report.

Routing Service Monthly

Name	Description
Timezone	The timezone for displaying results on the document or report.
Date Filter	The attributes to define the duration for displaying results on the document or report.
Routing Service Group - Routing Service Name	The name of the routing service in a routing service group that is used to route this contact to the agent. To filter results on the document or report, you can move the required routing service or routing service group from the **Available** list to the **Selected** list. By default, the **Search for field** option is disabled for this prompt. However, this field gets enabled when you select the attribute.

Supervisor Monthly

Name	Description
Timezone	The timezone for displaying results on the document or report.
Date Filter	The attributes to define the duration for displaying results on the document or report.

Time Series Monthly

Name	Description
Timezone	The timezone for displaying results on the document or report.
Date Filter	The attributes to define the duration for displaying results on the document or report.

VDN Summary Monthly

Name	Description
Timezone	The timezone for displaying results on the document or report.
Date Filter	The attributes to define the duration for displaying results on the document or report.
Routing Point ID: Routing Point Name	The name and ID of routing points. To filter results on the document or report, you can move the required routing points from the **Available** list to the **Selected** list.

Note:

While running a report or document, hierarchical or cascaded prompts such as Agent Group-Agent remain available in the **Available** list even after moving them to the **Selected** list.

Input prompts page buttons

The following table lists the buttons on the input prompts page of each document:

Button	Description
Run Document	To generate the document.
Cancel	To cancel generating the document.

Report summary page controls

The following actions are available on the report summary page depending on your permissions:

Action	Description
Save	To save a copy of the report.
Add to History List	To send a report to the History List, to be saved for future reference.
Create Personal View	To create and save a personal view of the report generated on a given date and time.
Share	To share the report generated through an email link or embedded report links in a web page.
Send Now	To send a report to any email address.
Export	To export the report in the required export format. For example, Excel and PDF data formats. **Note:** HTML data format is currently not supported.
Print	To print the report using Adobe Portable Document Format (PDF).
Full Screen Mode	To view the report summary page on the full screen.

Viewing a document based on interval data

About this task

Use this procedure to generate and view a document that uses a scheduled interval to generate the data. These documents do not include data from the current 15-minute interval until you run data aggregation for the interval. By default, the caching settings are set to 15 minutes.

Important:

To run a document, you must only use Supervisor credentials.

Procedure

1. Log on to Avaya Analytics™.
2. On the Home page, in the navigation pane, click **Shared Reports**.

3. In the content pane, click **Standard Historical Reports**.

   Avaya Analytics™ displays the Standard Historical Reports page.

4. Click the required document.

   For the list of available documents, see Standard Historical Reports page field descriptions on page 20.

5. On the input prompts, specify the values.

   For information about input prompts, see Input prompts on page 54.

6. Click **Run Document**.

   Avaya Analytics™ displays the document based on the input prompts.

   The document provides the Interval option with the values **15 mins**, **Daily**, **Weekly**, **Monthly**, and **Yearly**. The default interval is **15 mins**.

7. On the document, drill-down the required measure to obtain information about the measure.

Document summary page controls

The following actions are available on the document summary page depending on your permissions that you create for customization:

Action	Description
Share	To share the document generated through an email link or embedded links in a web page.
Print	To print the document using Adobe Portable Document Format (PDF).
Export	To export the document in the required export format. For example, Excel and PDF data formats. **Note:** HTML data format is currently not supported.
Save	To save a copy of the document.
Create Personal View	To create and save a personal view of the document generated on a given date and time.
Send Now	To send a document to any email address.
Add to History List	To send a document to the History List, to be saved for future reference.
Schedule Delivery to History List	To send a document to the History List page. This page specifies a folder where you can store documents on a specific schedule.
Refresh	To refresh the data on the document.
Re-prompt	To change the filter selection parameters.

Table continues…

Action	Description
Reset Selections	To change the filter selection parameters within the document that you generated.
Zoom (Fit Page)	To zoom in and zoom out the page.
Edit	To edit the document. This option is available to users with specific permissions.
Run as Editable Mode	To run the document in an editable mode to make the changes. This option is available to users with specific permissions.

Viewing a document with daily roll-up data

About this task

Use this procedure to generate and view a document that uses daily roll-up data to generate the information. These documents do not include data for the current day, because the data is calculated only the next day.

Important:

To run a document, you must only use Supervisor credentials.

Procedure

1. Log on to Avaya Analytics™.
2. On the Home page, in the navigation pane, click **Shared Reports**.
3. In the content pane, click **Standard Historical Reports**.

   Avaya Analytics™ displays the Standard Historical Reports page.
4. Click **Daily**.
5. On the Daily page, click the required document.

   For the list of available documents, see Daily page field descriptions on page 23.
6. On the input prompts, specify the values.

   For information about input prompts, see Input prompts on page 59.
7. Click **Run Document**.

   Avaya Analytics™ displays the document based on the input prompts.

   The document provides the Interval option with the values **Daily**, **Weekly**, **Monthly**, and **Yearly**. The default interval is **Daily**.
8. **(Optional)** To obtain information about the measure for the Account By Agent Daily report, drill-down the required measure on the document.

Document summary page controls

The following actions are available on the document summary page depending on your permissions that you create for customization:

Action	Description
Share	To share the document generated through an email link or embedded links in a web page.
Print	To print the document using Adobe Portable Document Format (PDF).
Export	To export the document in the required export format. For example, Excel and PDF data formats. **Note:** HTML data format is currently not supported.
Save	To save a copy of the document.
Create Personal View	To create and save a personal view of the document generated on a given date and time.
Send Now	To send a document to any email address.
Add to History List	To send a document to the History List, to be saved for future reference.
Schedule Delivery to History List	To send a document to the History List page. This page specifies a folder where you can store documents on a specific schedule.
Refresh	To refresh the data on the document.
Re-prompt	To change the filter selection parameters.
Reset Selections	To change the filter selection parameters within the document that you generated.
Zoom (Fit Page)	To zoom in and zoom out the page.
Edit	To edit the document. This option is available to users with specific permissions.
Run as Editable Mode	To run the document in an editable mode to make the changes. This option is available to users with specific permissions.

Viewing a document with monthly roll-up data

About this task

Use this procedure to generate and view a document that uses monthly roll-up data to generate the information. These documents do not include data for the current month, because the data is calculated only the next month.

Important:

To run a document, you must only use Supervisor credentials.

Procedure

1. Log on to Avaya Analytics™.
2. On the Home page, in the navigation pane, click **Shared Reports**.
3. In the content pane, click **Standard Historical Reports**.

   Avaya Analytics™ displays the Standard Historical Reports page.
4. Click **Monthly**.
5. On the Monthly page, click the required document.

   For the list of available documents, see Monthly page field descriptions on page 24.
6. On the input prompts, specify the values.

   For information about input prompts, see Input prompts on page 63.
7. Click **Run Document**.

   Avaya Analytics™ displays the document based on the input prompts.

   The document provides the Interval option with the values **Monthly** and **Yearly**. The default interval is **Monthly**.
8. **(Optional)** To obtain information about the measure for the Account By Agent Monthly report, drill-down the required measure on the document.

Document summary page controls

The following actions are available on the document summary page depending on your permissions that you create for customization:

Action	Description
Share	To share the document generated through an email link or embedded links in a web page.
Print	To print the document using Adobe Portable Document Format (PDF).

Table continues…

Action	Description
Export	To export the document in the required export format. For example, Excel and PDF data formats. **Note:** HTML data format is currently not supported.
Save	To save a copy of the document.
Create Personal View	To create and save a personal view of the document generated on a given date and time.
Send Now	To send a document to any email address.
Add to History List	To send a document to the History List, to be saved for future reference.
Schedule Delivery to History List	To send a document to the History List page. This page specifies a folder where you can store documents on a specific schedule.
Refresh	To refresh the data on the document.
Re-prompt	To change the filter selection parameters.
Reset Selections	To change the filter selection parameters within the document that you generated.
Zoom (Fit Page)	To zoom in and zoom out the page.
Edit	To edit the document. This option is available to users with specific permissions.
Run as Editable Mode	To run the document in an editable mode to make the changes. This option is available to users with specific permissions.

Viewing a Call Profile report dossier

About this task

Use this procedure to generate and view a Call Profile report dossier.

Important:

To run a document, you must only use Supervisor credentials.

Procedure

1. Log on to Avaya Analytics™.
2. On the Home page, in the navigation pane, click **Shared Reports**.
3. In the content pane, click **Standard Historical Reports**.

Avaya Analytics™ displays the Standard Historical Reports page.

4. Click **Call Profile**.
5. On the Call Profile page, click the required Call Profile report.

   For the list of available reports, see Call Profile page field descriptions on page 26.
6. On the input prompts, specify the values.

   For information about input prompts, see Input prompts on page 72.
7. Click **Run Dossier**.

   Avaya Analytics™ displays the dossier based on the input prompts.

   The dossier displays data for the following intervals: **15 mins**, **30 mins**, **Hours**, **Daily**, **Weekly**, **Monthly**, and **Yearly**. The default interval is **Weekly**.

Input prompts

The following tables list the input prompts that you use to run a Call Profile dossier:

Name	Description
Timezone	The timezone for displaying results on the dossier.
Date Filter	The attributes to define the duration for displaying results on the dossier.
Routing Service Group - Routing Service Name	The name of the routing service in a routing service group that is used to route this contact to the agent. To filter results on the document or report, you can move the required routing service or routing service group from the**Available** list to the **Selected** list. By default, the **Search for field** option is disabled for this prompt. However, this field gets enabled when you select the attribute.

Dossier summary page controls

The following actions are available on the dossier summary page depending on your permissions:

Action	Description
Save	Save a copy of the dossier.
Refresh	Refresh the data on the dossier.
Pause Data Retrieval	Edit the dossier without retrieving data
Re-prompt	Change the filter selection parameters.
Add Data	Add new or existing data, such as existing datasets or objects.
Export to PDF	Export the dossier in PDF format.
Share	Share the dossier generated through an email link or embedded links in a web page.

Table continues…

Action	Description
Print	Print the document using Adobe Portable Document Format (PDF).
Create Personal View	Create and save a personal view of the dossier generated on a given date and time.
Send Now	Send a dossier to any email address.
Add to History List	Send a dossier to the History List, to be saved for future reference.
Schedule Delivery to History List	Send a dossier to the History List page. This page specifies a folder where you can store dossiers on a specific schedule.
Reset Selections	Change the filter selection parameters within the dossier that you generated.
Zoom (Fit Page)	Zoom in and zoom out the page.
Edit	Edit the dossier. This option is available to users with specific permissions.
Run as Editable Mode	Run the dossier in an editable mode to make changes. This option is available to users with specific permissions.

Importing data from external datasources to create a report

Before you begin

You must be a basic or advanced user to perform this procedure.

Procedure

1. Log on to Avaya Analytics™.
2. Click **Create** > **Add External Data**.

   The Connect to Your Data page opens.
3. To import data in the form of Excel, CSV, JSON, TEXT and SAS from your local machine, do the following:
   a. Click **File from Disk**.
   b. Click **Choose files** and navigate to the file location.

      You can also drag and drop files on this window from the folders of your local machine.
   c. Click **Open**.
4. Click **Prepare Data** to edit the data and add more tables.

5. Click **Finish**.

Building a metric formula

About this task

Use this procedure to define your metric formula for analyzing data.

Note:

Only administrator or supervisor users can build a metric formula.

Procedure

1. Log on to Avaya Analytics™.
2. Click **Create** > **New Metric**.

   The Metric Editor - New Metric page opens.
3. Click **Switch to Formula Editor**.
4. In the **Metric Name**, type a name for the new metric formula.
5. To build the formula, do the following:
   a. From the **All Functions** drop-down, select the appropriate function, and double-click the required sub-functions.
   b. From the **All Objects** drop-down, select the objects required for the formula.
   c. To use the mathematical operators in the formula, click the operators above the formula editor.
   d. Click **Validate**.

      The formula is considered correct when the validation succeeds.
6. Click **Save** and navigate to the appropriate location, and click **Save**.

   The metric formula is now available to all users as a shared metric.

Emailing a report

About this task

You can send a report to any email address.

Before you begin

Based on your requirements, ensure that you have the following privileges:

- Email any report.
- Send a report to the history list.
- Send a link to the report location in the history list through an email.

Procedure

1. Log on to Avaya Analytics™.
2. On the Home page, in the navigation pane, click **Shared Reports**.
3. In the content pane, click **Standard Historical Reports**.

   Avaya Analytics™ displays the Standard Historical Reports page.
4. For reports based on interval data, do the following:
   a. Click **Reports**.
   b. Click the required report.

      To choose an appropriate report from the list of the available historical reports, see Reports page field descriptions on page 21.
   c. On the input prompts, specify the values.

      For information about input prompts, see Input prompts on page 54.
5. For reports based on daily roll-up data, do the following:
   a. Click **Daily** > **Reports**.
   b. Click the required report.

      To choose an appropriate report from the list of the available daily historical reports, see Reports page field descriptions on page 24.
   c. On the input prompts, specify the values.

      For information about input prompts, see Input prompts on page 59.
6. For reports based on monthly roll-up data, do the following:
   a. Click **Monthly** > **Reports**.
   b. Click the required report.

      To choose an appropriate report from the list of the available monthly historical reports, see Reports page field descriptions on page 25.
   c. On the input prompts, specify the values.

      For information about input prompts, see Input prompts on page 63.
7. On the report, in the **Interval** field, select the option according to the duration that you specify in the Time Filter input prompt.

   For example:

   - If you specify an interval or a date in the Time Filter input prompt, you must select the `15 mins` or `Daily` option in the **Interval** field.
   - If you specify a week, a month, or a year in the Time Filter input prompt, you must select the `weekly`, `monthly`, or `yearly` option in the **Interval** field.
8. Click **Run Report**.

Avaya Analytics™ displays the report summary page based on the values specified in the input prompts. You can further select the Interval, such as Daily, Weekly, Monthly, Yearly, from the report page.

9. On the report, click the hamburger icon (▤), and click **Send Now**.
10. To locate the recipient's email address, click **To**.

    Avaya Analytics™ displays the **Available** list of recipients from your address list in the Recipients Browser window.
11. Select the email address from the **Available** list and click **OK**.
    a. If you cannot find the email address in the list, enter the recipient's name and email address in the `Address Name` and `Physical Address` fields, respectively.
    b. Click **Add To Recipients** to add the new address.

       The new email address displays in the **To** field.
    c. Click **OK** to return to the Send Now page.
12. In the **Send** field, select one of the following options to specify how to send the report:
    - **Data in email**: The email displays the report.
    - **Data in email and to history list**: The email displays the report and is also delivered to the History List page.
    - **Data and link to history list in email**: The email displays the report and a link to the History List page.
    - **Link to history list in email**: The email includes a link to the History List page.
13. In the **Delivery Format** field, select one of the following formats to send the report:
    - **PDF**: To deliver the report in Adobe Portable Document Format (PDF).
    - **Excel**: To deliver the report in Microsoft Excel format.
    - **Plain Text**: To deliver the report in Rich Text Format.
    - **CSV**: To deliver the report in the Comma Separated Values file.

    Note:

    HTML data format is currently not supported.

    Important:

    To email a report, you can also click the **Send Now** link on the report icon.
14. **(Optional)** If you select **PDF** and your report has multiple pages, do the following:
    a. Click **PDF Settings**.

       The Export PDF window appears.
    b. In the **Range** field, select **Entire Dossier**.

   c. In the **Detail Level** field, select **Each visualization as a page**.
   d. Click **Save**.
15. Use the **Burst** option to send out personalized parts of a single report execution to a dynamic list of recipients.
16. In the **Subject** field, type a description for the report.
17. In the **Message** field, type the message to be emailed with the report.
18. To include the report in a zip file, do the following:
   a. Expand **Advanced Options**.
   b. Select the **Password Protect Zip File** check box to protect the zip file by providing a password.
   c. Type a password for the zip file.
   d. In the **Zip File Name** field, type the name for the zip file.
19. Click **OK**.

   Avaya Analytics™ sends the report to the specified email address.

Emailing a document

About this task

You can send a document to any email address.

Before you begin

Based on your requirements, ensure that you have the following privileges:

- Privilege to send a document to the history list.
- Privilege to send a link to the location of a document in the history list through an email.

Procedure

1. Log on to Avaya Analytics™.
2. On the Home page, in the navigation pane, click **Shared Reports**.
3. In the content pane, click **Standard Historical Reports**.

   Avaya Analytics™ displays the Standard Historical Reports page.
4. For documents based on interval data, do the following:
   a. Click the required document.

      To choose an appropriate document from the list of the available documents, see Standard Historical Reports page field descriptions on page 20.
   b. On the input prompts, specify the values.

      For information about input prompts, see Input prompts on page 54.

5. For documents based on daily roll-up data, do the following:
    a. Click **Daily**.
    b. Click the document.

        To choose an appropriate document from the list of the available documents, see Daily page field descriptions on page 23.
    c. On the input prompts, specify the values.

        For information about input prompts, see Input prompts on page 59.
6. For documents based on monthly roll-up data, do the following:
    a. Click **Monthly**.
    b. Click the document.

        To choose an appropriate document from the list of the available documents, see Monthly page field descriptions on page 24.
    c. On the input prompts, specify the values.

        For information about input prompts, see Input prompts on page 63.
7. On the document, in the **Interval** field, select the option according to the duration that you specify in the Time Filter input prompt.

    For example:
    - If you specify an interval or a date in the Time Filter input prompt, you must select the `15 mins`, `Daily`, or `Monthly`option in the **Interval** field.
    - If you specify a week, a month, or an year in the Time Filter input prompt, you must select the `weekly`, `monthly`, or `yearly` option in the **Interval** field.
8. Click **Run Document**.

    Avaya Analytics™ displays the document summary page based on the values specified in the input prompts. You can further select the Interval, such as Daily ,Weekly, Monthly, Yearly, from the document page.
9. On the document, click the hamburger icon (☰), and then click **Send Now**.
10. To locate the recipient's email address, click **To**.

    Avaya Analytics™ displays the **Available** list of recipients from your address list in the Recipients Browser window.
11. Select the email address from the **Available** list and click **OK**.
    a. If you cannot find the email address in the list, enter the recipient's name and email address in the `Address Name` and `Physical Address` fields, respectively.
    b. Click **Add To Recipients** to add the new address.

        The new email address displays in the **To** field.
    c. Click **OK** to return to the Send Now page.

12. In the **Send** field, select one of the following options to specify how to send the document:
    - **Data in email**: The email displays the document.
    - **Data in email and to history list**: The email displays the document and is also delivered to the History List page.
    - **Data and link to history list in email**: The email displays the document, along with a link to the History List page.
    - **Link to history list in email**: The email includes a link to the History List page.
13. In the **Delivery Format** field, select one of the following formats to send the document:
    - **Excel**: To deliver the document in Microsoft Excel format.
    - **PDF**: To deliver the document in Adobe Portable Document Format (PDF).

    Note:

    HTML data format is currently not supported.

    Important:

    You can also email a document by clicking the **Send Now** icon on the document icon.
14. Use the **Burst** option to send out personalized parts of a single report execution to a dynamic list of recipients.
15. In the **Subject** field, type a description for the document.
16. In the **Message** field, type the message to be emailed along with the document.
17. To include the document in a zip file, do the following:
    a. Expand **Advanced Options**.
    b. Select the **Password Protect Zip File** check box to protect the zip file by providing a password.
    c. Type a password for the zip file.
    d. In the **Zip File Name** field, type the name for the zip file.
18. Click **OK**.

    Avaya Analytics™ sends the document to the specified email address.

Emailing a dossier

About this task

You can send a dossier to any email address.

Before you begin

Based on your requirements, ensure that you have the following privileges:

- Email any dossier.
- Send a dossier to the history list.
- Send a link to the location of a dossier in the history list through an email.

Procedure

1. Log on to Avaya Analytics™.
2. On the Home page, in the navigation pane, click **Shared Reports**.
3. In the content pane, click **Standard Historical Reports**.

   Avaya Analytics™ displays the Standard Historical Reports page.
4. In the content pane, click **Call Profile**.
5. Complete the following steps for a dossier based on call profile data:
   a. Click the required dossier.

      To select an appropriate call profile dossier, see *Chapter 9: Call Profile Reports*.
   b. Specify the values on the input prompts.

      For more information about input prompts, see Input prompts on page 72.
6. On the dossier, select the **Start Date** and **End Date** according to the duration that you specify in the Time Filter input prompt.

   For example, to view the number of calls related to your routing services in a given quarter, you can use the time filters to select the months of the quarter.
7. Click **Run Dossier**.

   Avaya Analytics™ displays the dossier summary visualizations based on the values specified in the input prompts.
8. On the dossier page, click the **File** menu and then click **Send Now**.
9. In the **Send** field, select one of the following options to specify how to send the dossier:
   - **Data in email**: The email displays the dossier.
   - **Data in email and to history list**: The email displays the dossier and is also delivered to the History List page.
   - **Data and link to history list in email**: The email displays the dossier, along with a link to the History List page.
   - **Link to history list in email**: The email includes a link to the History List page.
10. In the **Delivery Format** field, select one of the following formats to send the dossier:
    - **PDF**: To deliver the dossier in Adobe Portable Document Format (PDF).
    - **MSTR**: To deliver the dossier in Historical Reporting (`.mstr`) format.

11. Click **PDF Settings** and complete the following steps to change the PDF page formatting for the dossier:
    a. In the **Range** field, select from the following options:
        - **This Page**: Current page
        - **This Chapter**: Current chapter
        - **Entire Dossier**: Entire dossier
    b. In the **Detail Level** field, select from the following options:
        - **Full page views**: Exports a snapshot of each page and each individual visualization
        - **Each visualization as a page**: Exports full details of individual visualizations
        - **Both**
    c. In the **Grid Settings** field, select from the following options:
        - **Scale to page width**: Fits the grid's width onto one PDF page width
        - **Extend colums over pages**: Breaks a wide grid onto numerous pages
12. In the **Subject** field, type a description for the dossier.
13. In the **Message** field, type the message to be emailed along with the dossier.
14. To include the report in a zip file, do the following:
    a. Expand **Advanced Options**.
    b. Select the **Password Protect Zip File** check box to provide a password to protect the zip file.
    c. Type a password for the zip file.
    d. In the **Zip File Name** field, type the name for the zip file.
15. Click **OK**.

    Avaya Analytics™ sends the dossier to the specified email address.

Exporting a report

About this task

You can export a whole report or the first report page from the Avaya Analytics™ interface. Using the export option, you can export report title or filter details. You can also edit the custom settings of your report. If you export reports in Excel, you can export metric values and headers as texts and embed all images.

Procedure

1. Log on to Avaya Analytics™.

2. On the Home page, in the navigation pane, click **Shared Reports**.
3. In the content pane, click **Standard Historical Reports**.

   Avaya Analytics™ displays the Standard Historical Reports page.
4. For reports based on interval data, do the following:
   a. Click **Reports**.
   b. Click the required report.

      To choose an appropriate report from the list of the available historical reports, see Reports page field descriptions on page 21.
   c. On the input prompts, specify the values.

      For information about input prompts, see Input prompts on page 54.
5. For reports based on daily roll-up data, do the following:
   a. Click **Daily** > **Reports**.
   b. Click the required report.

      To choose an appropriate report from the list of the available daily historical reports, see Reports page field descriptions on page 24.
   c. On the input prompts, specify the values.

      For information about input prompts, see Input prompts on page 59.
6. For reports based on monthly roll-up data, do the following:
   a. Click **Monthly** > **Reports**.
   b. Click the required report.

      To choose an appropriate report from the list of the available monthly historical reports, see Reports page field descriptions on page 25.
   c. On the input prompts, specify the values.

      For information about input prompts, see Input prompts on page 63.
7. Click **Run Report**.

   Avaya Analytics™ displays the report summary page based on the values specified in the input prompts. You can further select the Interval, such as Daily, Weekly, Monthly, Yearly, from the report page.
8. On the report, click the hamburger icon (), and then click **Export**.
9. Select the required export format.

   The export formats are Excel, CSV, PDF, and plain text.

   Note:

   HTML data format is currently not supported.

Important:

You can also export a report or document by clicking the **Export** option on the report icon.

Exporting a document

About this task

You can export a document in different file formats.

Procedure

1. Log on to Avaya Analytics™.
2. On the Home page, in the navigation pane, click **Shared Reports**.
3. In the content pane, click **Standard Historical Reports**.

   Avaya Analytics™ displays the Standard Historical Reports page.
4. For documents based on interval data, do the following:
   a. Click the required document.

      To choose an appropriate document from the list of the available documents, see Standard Historical Reports page field descriptions on page 20.
   b. On the input prompts, specify the values.

      For information about input prompts, see Input prompts on page 54.
5. For documents based on daily roll-up data, do the following:
   a. Click **Daily**.
   b. Click the document.

      To choose an appropriate document from the list of the available documents, see Daily page field descriptions on page 23.
   c. On the input prompts, specify the values.

      For information about input prompts, see Input prompts on page 59.
6. For documents based on monthly roll-up data, do the following:
   a. Click **Monthly**.
   b. Click the document.

      To choose an appropriate document from the list of the available documents, see Monthly page field descriptions on page 24.
   c. On the input prompts, specify the values.

      For information about input prompts, see Input prompts on page 63.

7. Click **Run Document**.

   Avaya Analytics™ displays the report summary page based on the values specified in the input prompts. You can further select the Interval, such as Daily ,Weekly, Monthly, Yearly, from the report page.
8. On the document, click the hamburger icon (☰), and then click **Export**.
9. Select the required export format.

   The export formats are Excel and PDF.

   Note:

   HTML data format is currently not supported.

   Important:

   You can also export a document by clicking the **Export** option on the document icon.

Exporting a dossier

About this task

You can export a dossier to PDF format from the Avaya Analytics™ interface. Complete the following steps to export a dossier:

Note:

The **Export to PDF** settings in this procedure are specific to Call Profile dossier reports.

Procedure

1. Log on to Avaya Analytics™.
2. On the Home page, in the navigation pane, click **Shared Reports**.
3. In the content pane, click **Standard Historical Reports**.

   Avaya Analytics™ displays the Standard Historical Reports page.
4. In the content pane, click **Call Profile**.
5. Complete the following steps for a dossier based on call profile data:
   a. Click the required dossier.

      To select an appropriate call profile dossier, see *Chapter 9: Call Profile Reports*.
   b. Specify the values on the input prompts.

      For more information about input prompts, see Input prompts on page 72.
6. On the dossier, select the **Start Date** and **End Date** according to the duration that you specify in the Time Filter input prompt.

   For example, to view the number of calls related to your routing services in a given quarter, you can use the time filters to select the months of the quarter.

7. Click **Run Dossier**.

   Avaya Analytics™ displays the dossier summary visualizations based on the values specified in the input prompts.
8. On the dossier, click the **File** menu and then click **Export to PDF**.
9. Complete the following steps in the Export to PDF window:
   a. In the **Range** field, select from the following options:
      - **This Page**: Current page
      - **This Chapter**: Current chapter
      - **Entire Dossier**: Entire dossier

   b. In the **Detail Level** field, select from the following options:
      - **Full page views**: Exports a snapshot of each page and each individual visualization
      - **Each visualization as a page**: Exports full details of individual visualizations
      - **Both**

   c. In the **Grid Settings** field, select from the following options:
      - **Scale to page width**: Fits the grid's width onto one PDF page width
      - **Extend colums over pages**: Breaks a wide grid onto numerous pages
10. Click **Export**.

    Avaya Analytics™ exports the dossier to PDF.

Scheduling a report

About this task

Use this procedure to create a schedule for a report. When you create a schedule for a report, Avaya Analytics™ generates the report based on the schedule and saves it in the **History List**.

Procedure

1. Log on to Avaya Analytics™.
2. On the Home page, in the navigation pane, click **Shared Reports**.
3. In the content pane, click **Standard Historical Reports**.

   Avaya Analytics™ displays the Standard Historical Reports page.
4. For reports based on interval data, do the following:
   a. Click **Reports**.

   b. Click the required report.

To choose an appropriate report from the list of the available historical reports, see Reports page field descriptions on page 21.

c. On the input prompts, specify the values.

For information about input prompts, see Input prompts on page 54.

5. For reports based on daily roll-up data, do the following:
    a. Click **Daily** > **Reports**.
    b. Click the required report.

       To choose an appropriate report from the list of the available daily historical reports, see Reports page field descriptions on page 24.
    c. On the input prompts, specify the values.

       For information about input prompts, see Input prompts on page 59.
6. For reports based on monthly roll-up data, do the following:
    a. Click **Monthly** > **Reports**.
    b. Click the required report.

       To choose an appropriate report from the list of the available monthly historical reports, see Reports page field descriptions on page 25.
    c. On the input prompts, specify the values.

       For information about input prompts, see Input prompts on page 63.
7. Click **Run Report**.

   Avaya Analytics™ generates the report based on the input prompts.
8. Click the hamburger icon (☰) and click **Schedule Delivery to History List**.
9. In the **Name** field, type a name for the new report schedule.

   The **Report** field displays the name of the report.
10. In the **Schedule** field, select a schedule or event on which the report must be delivered.
11. Click **To** to add more recipients for the subscription.
12. To get the report delivered immediately after creating the subscription, select the **Run subscription immediately** check box.
13. In **Advanced Options**, click the plus icon to do the following:
    a. To ensure that newer versions of the report overwrite previous versions on the History List page, select the **The new scheduled report will overwrite older versions of itself** check box.
    b. To specify a date after which the report delivery must be stop, select the **Do not deliver after** check box, and select the date from the calendar.
14. To have a notification email sent to the sender after the report delivery, select the **Send notification to email address** check box.

15. Click **OK**.

Scheduling a document

About this task

When you create a schedule for a document, Avaya Analytics™ generates the document based on the schedule and saves it in the **History List**.

Procedure

1. Log on to Avaya Analytics™.
2. On the Home page, in the navigation pane, click **Shared Reports**.
3. In the content pane, click **Standard Historical Reports**.

   Avaya Analytics™ displays the Standard Historical Reports page.
4. For documents based on interval data, do the following:
   a. Click the required document.

      To choose an appropriate document from the list of the available documents, see Standard Historical Reports page field descriptions on page 20.
   b. On the input prompts, specify the values.

      For information about input prompts, see Input prompts on page 54.
5. For documents based on daily roll-up data, do the following:
   a. Click **Daily**.
   b. Click the document.

      To choose an appropriate document from the list of the available documents, see Daily page field descriptions on page 23.
   c. On the input prompts, specify the values.

      For information about input prompts, see Input prompts on page 59.
6. For documents based on monthly roll-up data, do the following:
   a. Click **Monthly**.
   b. Click the document.

      To choose an appropriate document from the list of the available documents, see Monthly page field descriptions on page 24.
   c. On the input prompts, specify the values.

      For information about input prompts, see Input prompts on page 63.
7. Click **Run Document**.

   Avaya Analytics™ displays the document summary page based on the values specified in the input prompts.

8. Click the hamburger icon (☰) and click **Schedule Delivery to History List**.
9. In the **Name** field, type a name for the new document schedule.

   The **Document** field displays the name of the document.
10. In the **Schedule** field, select a schedule or event on which the document must be delivered.
11. Click **To** to add more recipients for the subscription.
12. For the preview of the document, in the **Pre-generate export** drop-down, select, **PDF** or **Excel**.

    The default option is None.
13. To get the document delivered immediately after creating the subscription, select the **Run subscription immediately** check box.
14. In **Advanced Options**, click the plus icon to do the following:
    a. To ensure that newer versions of the document overwrite previous versions on the History List page, select the **The new scheduled report will overwrite older versions of itself** check box.
    b. To specify a date after which the document delivery must stop, select the **Do not deliver after** check box, and select the date from the calendar.
15. To have a notification email sent to the sender after the document delivery, select the **Send notification to email address** check box.
16. Click **OK**.

Scheduling a dossier

About this task

Use this procedure to create a schedule for a dossier. When you create a schedule for a dossier, Avaya Analytics™ generates the dossier based on the schedule and saves it in the **History List**.

Procedure

1. Log on to Avaya Analytics™.
2. On the Home page, in the navigation pane, click **Shared Reports**.
3. In the content pane, click **Standard Historical Reports**.

   Avaya Analytics™ displays the Standard Historical Reports page.
4. In the content pane, click **Call Profile**.
5. Complete the following steps for a dossier based on call profile data:
   a. Click the required dossier.

      To select an appropriate call profile dossier, see *Chapter 9: Call Profile Reports*.

b. Specify the values on the input prompts.

   For more information about input prompts, see Input prompts on page 72.

6. On the dossier, select the **Start Date** and **End Date** according to the duration that you specify in the Time Filter input prompt.

   For example, to view the number of calls related to your routing services in a given quarter, you can use the time filters to select the months of the quarter.

7. Click **Run Dossier**.

   Avaya Analytics™ displays the dossier summary visualizations based on the values specified in the input prompts.

8. On the dossier page, click the **File** menu and then click **Schedule Delivery to History List**.

9. In the **Name** field, type a name for the new dossier schedule.

   The **Dossier** field displays the name of the dossier.

10. In the **Schedule** field, select a schedule or event on which you want to deliver the dossier.

11. Click **To** to add more recipients for the subscription.

12. In the **Delivery Format** field, select one of the following formats to send the dossier:
    - **PDF**: To deliver the dossier in Adobe Portable Document Format (PDF).
    - **MSTR**: To deliver the dossier in Historical Reporting (`.mstr`) format.

13. Click **PDF Settings** to change the PDF page formatting for the dossier.
    a. In the **Range** field, select from the following options:
       - **This Page**: Current page
       - **This Chapter**: Current chapter
       - **Entire Dossier**: Entire dossier

    b. In the **Detail Level** field, select from the following options:
       - **Full page views**: Exports a snapshot of each page and each individual visualization
       - **Each visualization as a page**: Exports full details of individual visualizations
       - **Both**

    c. In the **Grid Settings** field, select from the following options:
       - **Scale to page width**: Fits the grid's width onto one PDF page width
       - **Extend colums over pages**: Breaks a wide grid onto numerous pages

14. Select the **Run subscription immediately** check box to get the dossier delivered immediately after creating the subscription.

15. In **Advanced Options**, click the **plus** icon to complete the following steps:
    a. Select the **The new scheduled report will overwrite older versions of itself** check box to ensure that newer versions of the dossier overwrite previous versions on the History List page.
    b. Select the **Do not deliver after** check box and select the date from the calendar to specify a date after which the dossier delivery must stop.
16. Select the **Send notification to email address** check box to have a notification email sent to the sender after the dossier delivery.
17. Click **OK**.

Printing a report

About this task

For printing a report, you must use Adobe Reader 6.0 or later.

Procedure

1. Log on to Avaya Analytics™.
2. On the Home page, in the navigation pane, click **Shared Reports**.
3. In the content pane, click **Standard Historical Reports**.

   Avaya Analytics™ displays the Standard Historical Reports page.
4. For reports based on interval data, do the following:
    a. Click **Reports**.
    b. Click the required report.

       To choose an appropriate report from the list of the available historical reports, see Reports page field descriptions on page 21.
    c. On the input prompts, specify the values.

       For information about input prompts, see Input prompts on page 54.
5. For reports based on daily roll-up data, do the following:
    a. Click **Daily** > **Reports**.
    b. Click the required report.

       To choose an appropriate report from the list of the available daily historical reports, see Reports page field descriptions on page 24.
    c. On the input prompts, specify the values.

       For information about input prompts, see Input prompts on page 59.

6. For reports based on monthly roll-up data, do the following:
    a. Click **Monthly** > **Reports**.
    b. Click the required report.

       To choose an appropriate report from the list of the available monthly historical reports, see Reports page field descriptions on page 25.
    c. On the input prompts, specify the values.

       For information about input prompts, see Input prompts on page 63.
7. Click **Run Report**.

   Avaya Analytics™ generates the report based on the input prompts.
8. On the menu bar, click the Print icon.
9. On the Print options page, enter the desired values and click **Show Printable Version**.
10. On the Reports page, click the Print icon.

Printing a document

About this task

For printing a document, you must use Adobe Reader 6.0 or later.

Procedure

1. Log on to Avaya Analytics™.
2. On the Home page, in the navigation pane, click **Shared Reports**.
3. In the content pane, click **Standard Historical Reports**.

   Avaya Analytics™ displays the Standard Historical Reports page.
4. For documents based on interval data, do the following:
    a. Click the required document.

       To choose an appropriate document from the list of the available documents, see Standard Historical Reports page field descriptions on page 20.
    b. On the input prompts, specify the values.

       For information about input prompts, see Input prompts on page 54.
5. For documents based on daily roll-up data, do the following:
    a. Click **Daily**.
    b. Click the document.

       To choose an appropriate document from the list of the available documents, see Daily page field descriptions on page 23.

   c. On the input prompts, specify the values.

      For information about input prompts, see Input prompts on page 59.

6. For documents based on monthly roll-up data, do the following:

   a. Click **Monthly**.

   b. Click the document.

      To choose an appropriate document from the list of the available documents, see Monthly page field descriptions on page 24.

   c. On the input prompts, specify the values.

      For information about input prompts, see Input prompts on page 63.

7. Click **Run Document**.

   Avaya Analytics™ displays the report summary page based on the values specified in the input prompts.

8. On the report page, click the hamburger icon (☰).

9. Click **Print**.

Printing a dossier

Procedure

1. Log on to Avaya Analytics™.

2. On the Home page, in the navigation pane, click **Shared Reports**.

3. In the content pane, click **Standard Historical Reports**.

   Avaya Analytics™ displays the Standard Historical Reports page.

4. In the content pane, click **Call Profile**.

5. Complete the following steps for a dossier based on call profile data:

   a. Click the required dossier.

      To select an appropriate call profile dossier, see *Chapter 9: Call Profile Reports*.

   b. Specify the values on the input prompts.

      For more information about input prompts, see Input prompts on page 72.

6. On the dossier, select the **Start Date** and **End Date** according to the duration that you specify in the Time Filter input prompt.

   For example, to view the number of calls related to your routing services in a given quarter, you can use the time filters to select the months of the quarter.

7. Click **Run Dossier**.

Avaya Analytics™ displays the dossier summary visualizations based on the values specified in the input prompts.

8. On the dossier page, click the **File** menu and then click **Print**.

   The visualization page opens in a preview pane.

9. Select one of the following options from the **Destination** dropdown menu:
   - **Save as PDF**
   - **Select a printer**
   - **See more**
10. Click **Print/Save**.
11. Repeat steps 9 and 10 for the remaining pages in the dossier.

Subscribing to a report

About this task

You can subscribe to any report to receive updated copies of that report in the chosen format.

Procedure

1. Log on to Avaya Analytics™.
2. On the Home page, in the navigation pane, click **Shared Reports**.
3. In the content pane, click **Standard Historical Reports**.

   Avaya Analytics™ displays the Standard Historical Reports page.

4. For reports based on interval data, click **Reports**.
5. For reports based on daily roll-up data, click **Daily** > **Report**.
6. For reports based on monthly roll-up data, click **Monthly** > **Report**.
7. On the reports list page, under the name of the report for which you want to create a subscription, do one of the following:
   - In the Large Icons view, click the **Subscriptions** link below the icon of the report.
   - In the List view, click the **Subscriptions** icon ( ) in the Actions column.
8. Click **Add <the type of the subscription> subscription**.

   For information about the type of subscriptions, see Subscription of reports on page 16.

9. In the **Name** field, type a name for the subscription.

   The **Document** field displays the name of the document.

10. In the **Schedule** field, select a schedule from the drop-down list for the subscription.
11. Click **To** to add more recipients for the subscription.

12. Select the **Run subscription immediately** option.
13. Expand **Advanced Options** and complete the following steps as required:
    a. Select or deselect the **The new scheduled report will overwrite older versions of itself** option.

       This option is selected by default.
    b. Under **Delivery**, select the **Do not deliver after** option and set a date after which you do not want delivery of the document.
14. In the **Delivery Notification** section, select the **Send notification to email address** option and enter the email address in the **New Address** field.
15. Click **OK**.

Subscribing to a document

About this task

You can subscribe to any document to receive updated copies of that document in the chosen format.

Procedure

1. Log on to Avaya Analytics™.
2. On the Home page, in the navigation pane, click **Shared Reports**.
3. In the content pane, click **Standard Historical Reports**.

   Avaya Analytics™ displays the Standard Historical Reports page.
4. For documents based on interval data, click the document.
5. For documents based on daily roll-up data, click **Daily**.
6. For documents based on monthly roll-up data, click **Monthly**.
7. On the reports list page, under the name of the document for which you want to create a subscription, do one of the following:
   - In the Large Icons view, click the **Subscriptions** link below the icon of the report.
   - In the List view, click the **Subscriptions** icon ( ) in the Actions column.
8. Click **Add <the type of the subscription> subscription**.

   For information about the type of subscriptions, see Subscription of reports on page 16.
9. In the **Name** field, type a name for the subscription.

   The **Document** field displays the name of the document.
10. In the **Schedule** field, select a schedule from the drop-down list for the subscription.
11. Click **To** to add more recipients for the subscription.

12. Select the **Run subscription immediately** option.
13. Expand **Advanced Options** and complete the following steps as required:
    a. Select or deselect the **The new scheduled report will overwrite older versions of itself** option.

       This option is selected by default.
    b. Under **Delivery**, select the **Do not deliver after** option and set a date after which you do not want delivery of the document.
14. In the **Delivery Notification** section, select the **Send notification to email address** option and enter the email address in the **New Address** field.
15. Click **OK**.

Subscribing to a dossier

About this task

You can subscribe to any dossier to receive updated copies of that dossier in the chosen format.

Procedure

1. Log on to Avaya Analytics™.
2. On the Home page, in the navigation pane, click **Shared Reports**.
3. In the content pane, click **Standard Historical Reports**.

   Avaya Analytics™ displays the Standard Historical Reports page.
4. In the content pane, click **Call Profile**.
5. Click the required dossier.

   To select an appropriate call profile dossier, see *Chapter 9: Call Profile Reports*.
6. On the dossier list page, under the name of the dossier for which you want to create a subscription, do one of the following:
   - In the **Large Icons** view, click the **Subscriptions** link below the icon of the report.
   - In the **List** view, click the **Subscriptions** icon in the **Actions** column.
7. Click **Add** to add the type of subscription.

   For information about the type of subscriptions, see Subscription of reports on page 16.
8. In the **Name** field, type a name for the subscription.

   The **Dossier** field displays the name of the dossier.
9. In the **Schedule** field, select a schedule from the list for the subscription.
10. Click **To** to add more recipients for the subscription.

11. In the **Delivery Format** field, select one of the following formats to send the dossier:
    - **PDF**: To deliver the dossier in Adobe Portable Document Format (PDF).
    - **MSTR**: To deliver the dossier in Historical Reporting (`.mstr`) format.
12. Click **PDF Settings** to change the PDF page formatting for the dossier.
    a. In the **Range** field, select from the following options:
       - **This Page**: Current page
       - **This Chapter**: Current chapter
       - **Entire Dossier**: Entire dossier

    b. In the **Detail Level** field, select from the following options:
       - **Full page views**: Exports a snapshot of each page and each individual visualization
       - **Each visualization as a page**: Exports full details of individual visualizations
       - **Both**

    c. In the **Grid Settings** field, select from the following options:
       - **Scale to page width**: Fits the grid's width onto one PDF page width
       - **Extend colums over pages**: Breaks a wide grid onto numerous pages
13. Select the **Send a preview now** checkbox to send a preview immediately.
14. In the **Subject** field, type a description for the dossier.
15. In the **Message** field, type the message to be emailed along with the dossier.
16. To include the report in a zip file, do the following:
    a. Expand **Advanced Options**.

    b. Select the **Password Protect Zip File** check box to provide a password to protect the zip file.

    c. Type a password for the zip file.

    d. In the **Zip File Name** field, type the name for the zip file.

    e. Select the **Do not deliver after** check box and select the date from the calendar, to specify a date after which the dossier delivery must stop.
17. Click **OK**.

    Avaya Analytics™ sends the dossier to the specified email address.

Unsubscribing a document or report

About this task

Complete the following steps to unsubscribe a document or report:

Procedure

1. Log on to Avaya Analytics™.
2. On the **Home** page, click My Subscriptions or click **My Subscriptions** in the left navigational pane.
3. On the My Subscriptions page, in the **Unsubscribe** column, select the check box of the document or report that you want to unsubscribe.
4. Click the **Unsubscribe** column header.

   The selected document or report is removed from the Subscriptions list.

Setting thresholds

About this task

Using thresholds, you can draw immediate attention to data based on evaluations. For example, you can set thresholds to highlight rows in red for display values that are greater than 10. You can add thresholds in design mode only.

Important:

To run a report, you must only use Supervisor credentials.

Procedure

1. Log on to Avaya Analytics™.
2. On the Home page, in the navigation pane, click **Shared Reports**.
3. In the content pane, click **Standard Historical Reports**.

   Avaya Analytics™ displays the Standard Historical Reports page.
4. For reports based on interval data, do the following:
   a. Click **Reports**.
   b. Click the required report.

      To choose an appropriate report from the list of the available historical reports, see Reports page field descriptions on page 21.
   c. On the input prompts, specify the values.

      For information about input prompts, see Input prompts on page 54.
5. For reports based on daily roll-up data, do the following:
   a. Click **Daily** > **Reports**.
   b. Click the required report.

      To choose an appropriate report from the list of the available daily historical reports, see Reports page field descriptions on page 24.

c. On the input prompts, specify the values.

For information about input prompts, see Input prompts on page 59.

6. For reports based on monthly roll-up data, do the following:

a. Click **Monthly** > **Reports**.

b. Click the required report.

To choose an appropriate report from the list of the available monthly historical reports, see Reports page field descriptions on page 25.

c. On the input prompts, specify the values.

For information about input prompts, see Input prompts on page 63.

7. Click **Run Report**.

Avaya Analytics™ generates the report based on the input prompts.

8. On the report, right-click on a metric and click **Thresholds**.

9. Select one of the following options:

- **Visual**

  In the Visual Threshold Editor, you can specify the condition by defining different ranges of values. You can then specify the formatting to automatically apply to data that falls into these ranges.

- **Advanced**

  In the Advanced Threshold Editor, you can format data in a visualization based on multiple attribute or metric qualifications.

10. To set visual thresholds, provide the required value.

11. To set advanced thresholds, select the required options and provide the value.

Creating a report, document, or dossier from external data

About this task

In Avaya Analytics™, Basic and Advanced users create a report, document, or dossier with data from external files, such as Excel, JSON, or CSV files saved in your machine. You can blend the data with Avaya Analytics™ data or use the externally sourced data.

Procedure

1. Log on to Avaya Analytics™.

2. From the navigation bar on the left, click **Create** > **Add External Data**.

   Avaya Analytics™ displays the **Connect to Your Data** page.

3. To import data from files on your local machine, do the following:
    a. Click **File from Disk**.
    b. On the **Upload your files** page, click **Choose files**.
    c. Choose your files and click **Open**.
    d. **(Optional)** To edit the data before importing, click **Prepare Data**.

       Edit the data as required in the **Data Prepare** box.
    e. Click **Finish**.

   Avaya Analytics™ displays the Save As window.
4. To save the file in your desired location, in the **Save in** field, click the location.
5. **(Optional)** In the **Name** field, you can change the name of the file.
6. **(Optional)** In the **Description** field, enter the description for future reference.
7. **(Optional)** To create a new folder to save the file, click **Create New Folder**.
8. Click **Save**.

   Avaya Analytics™ displays the Start your analysis page.
9. Depending on your requirement, click one of the following:
    - **Create Dossier**
    - **Create Document**
    - **Create Report**

   The document opens in the Design mode with the metrics and attributes available in the selected data source.
10. Drag and drop the Attributes and Metrics to the right panel to create a new report document.

    Avaya Analytics™ displays the adhoc report from the external data source.

Creating database connections to an external database

About this task

In Avaya Analytics™, advanced users can create connections to the popular external databases for importing data. You can use the data to create reports and documents.

You can define a new database connection directly from Avaya Analytics™ for users to import data, edit, delete, rename, or duplicate an existing connection.

Before you begin

Ensure the following:

- Get advanced user credentials.

- Create a data source with Data Source Name (DSN) if you plan to connect to a data source using a DSN.

  Note:

  You can also use the DSNLess Connection option to connect to your data source.

Procedure

1. Log on to Avaya Analytics™ with your advanced user credentials.
2. From the navigation bar on the left, click **Create** > **Add External Data**.

   Note:

   A basic user can get access to only the data files from the local machine, such as excel files, CSV, JSON files. An advanced user can get access to data from external databases.

   Avaya Analytics™ displays the Connect to Your Data page.
3. Click **Databases** and select the database that you want to connect to, such as Microsoft SQL (MS SQL) database.

   The Select Import Options page pops up and displays the following options:

   - **Build a Query**
   - **Type a Query**
   - **Select Tables**
4. Depending of the type of data you want to import, click one of the following options:
   - To use a graphical interface to build the SQL query to use to import your data, click the **Build a Query** button.
   - To manually type or paste a query to import your data, click the **Type a Query** button.
   - To select tables in the data for the import, click the **Select Tables** button.
5. Click **Next**.
6. To create a new data source, click the plus icon next to **DATA SOURCES**.

   The Data Source page pops up.
7. Select the type of connection to the database using one of the following options:
   - DSN Data Sources
   - DSN-less Data Sources
8. Depending on the database connection you choose, enter the details in the fields and click **Save**.
9. To test the connection, return to **Import** from the <import options> page and ensure that the page displays the information.

   Here <import options> refers to any of the data types you choose to import, such as tables.

Exporting web objects

About this task

In Avaya Analytics™, you can export web objects to archive all reports during an upgrade.

Warning:

Do not export canned reports. Exporting these reports between releases or patches can overwrite all fixes delivered in a release or a patch.

Before you begin

Create a folder on your local machine to save the exported files.

Procedure

1. Log on to Avaya Analytics™.

   Note:

   Log in as administrator if you want to export a large number of reports at the folder level.

2. To export reports from the `Custom Reports` folder, click **Shared Reports** > **Custom Reports**.
3. To export standard historical reports, click **Shared Reports** > **Standard Historical Reports**.
4. To export interval based reports, click **Shared Reports** > **Standard Historical Reports** > **Reports**.
5. To export reports based on daily data, click **Shared Reports** > **Standard Historical Reports** > **Daily** > **Reports**.
6. To export reports based on monthly data, click **Shared Reports** > **Standard Historical Reports** > **Monthly** > **Reports**.
7. Right-click the folder and click **Export to MMP**.

   Avaya Analytics™ downloads the migration package to the designated folder on your machine. This package contains the objects and their dependencies.

8. Follow the same procedure for exporting individual reports or documents from any of these folders.

Importing web objects

About this task

In Avaya Analytics™, administrators can import a custom mmp file, such as a custom report, that other users create to generate historical reports.

Important:

You must refresh your browser after a successful import.

Before you begin

Create a folder on your local machine to save the imported files.

Procedure

1. Log in to Avaya Analytics™ as `Administrator`.
2. Click **Shared Reports** or **My Reports**.
3. On the left navigation bar, click **Import Migration Package**.
4. In the Import a Migration Package page, click **Choose File**.
5. To import the selected file, click **Import**.

   Avaya Analytics™ downloads an file in the designed folder on your machine.

Next steps

Refresh your browser.

Chapter 6: Historical reports summary overview

Using historical reports based on interval data, you can generate reports for a week, month, or year based on the current interval. All historical summary and trend reports that return interval-based measures do not include data from the current 15-minute interval until data aggregation is run for the interval. By default, report caching settings are set to 15 minutes. Therefore, you might need to wait for up to 30 minutes for the data of the current interval to display in the report.

Note:

The maximum data retention period for these reports is 12 months. This data retention period is configurable.

The historical reports based on interval data available in Avaya Analytics™ are:

- Account By Agent
- Agent By Routing Service
- Agent Configuration
- Agent Login/Logout Report
- Agent Not Ready by Reason Code
- Agent Performance Summary
- Contact Center
- Engagement
- Contact Detail
- Messaging Engagement Summary
- Routing Service
- Supervisor
- Time Series
- VDN

For more detailed information about the measures, data, and reports that Avaya Analytics™ provides, see *Avaya Analytics™ Data Dictionary* available from the Avaya Support website at https://support.avaya.com.

This chapter provides a summary of the historical reports that are based on interval data, such as how each report works and the respective business usage.

Account by Agent Summary

Definition

Displays a summary of agents who handled the contacts for the accounts during the current interval.

How it works

Tracks the performance of the contact center agents by account for the current interval. Intervals are aggregated by 15 minutes and can be either an Interval, Daily, Weekly, Monthly or Yearly. Supervisors can select the agents to report on and analyze the performance of agents serving the accounts for the selected interval.

This report displays the accounts, their attributes, and the channels through which a contact is routed.

You can drill down on an agent to view the **Agent Details** report. This report provides agent performance at a detail level.

You can drill down on Abandoned, Completed, Conferenced, Offered, Transferred, Not Answered, Consulted, and Number of Holds measures to view the **Agent Interaction** report. This report provides agent interactions for the selected measure.

Business usage

- How many contacts were offered to the agent and for which accounts for the current interval?

  Use the **Offered** measure to determine the number of contacts offered to the agent. Use the **Account ID** measure to determine the accounts serviced by the agent.
- How many accounts did the agent service for the current interval?

  Use the **Account ID** measure to determine the accounts that the agent serviced.
- How do you determine the usage of channels by agent for the reporting period?

  Use the **Channel** measure to determine the number of channels that the agent supported while supporting an account. Use the **Active Time** measure to determine the active time spent by the agent for the selected channel.
- How do you determine the occupancy rate of the agent for each account for the selected interval?

  Use the **Account ID** measure to determine the accounts that the agent supported the most. Use the **Average Active Time** measure to determine the active time spent by the agent for the accounts.
- How many accounts did the agent support on each channel, and how much time did the agent spend on each account for the current interval?

  Drill down on the agent to **Agent Details**. Use the **Account ID** and **Account Name** measures to determine the accounts that the agent supported on each channel. Use the **Active Time** measure to determine the time spent by the agent on each account.

- How do you determine the performance of the agent for the current interval?

  Drill down on the agent to **Agent Details**. Compare the **% Availability** with the **Average Active Time** measure to determine the performance of an agent.
- How do you view a snapshot of the agent performance across accounts?

  Drill down on the agent to **Agent Details**. Use the **Accounts by Agent Counts** View to determine the agent performance for all the accounts that the agent supported.
- How do you determine the reason for the segment type of a call?

  Drill down to **Agent Interaction Details** report. Use the **Segment Type** measure to determine the reason of the segment type of a call.
- How do you determine whether the supervisor has barged-out the agent from the call?

  Drill down to **Agent Interaction Details** report. Use the **Barged Out Indicator** measure to determine whether the supervisor has removed the agent from the call.

Agent By Routing Service

Definition

Displays how agents use routing services for the current interval.

How it works

Tracks the performance of agents by channels associated with the routing services for the current interval. Intervals are aggregated by 15 minutes and can be Daily, Weekly, Monthly, and Yearly.

Supervisors can select the routing services within a routing service group for reporting and track the channels' historical performance. Supervisors can only view routing services and routing service measures associated with the routing service group to which they are assigned.

You can drill down on Offered, Abandoned, Answered, Transferred, and Consults measures to view the **Agent Interaction Detail** report. This report provides agent interactions for the selected measure.

Business usage

- How do you determine an agent's performance by routing service for the current interval?

  You can determine an agent's performance by analyzing the data in the agent's Offered, Abandoned, Answered, Transferred, and Consults measures.
- How do you determine the usage of channels by an agent for the current interval?

  You can create a report by selecting the required routing service and corresponding channels. In the report, you can select the channels and determine the usage of each channel by the agent.
- How do you compare the performance of agents by routing services for the current interval?

  Use the **Offered** and **Answered** measures to determine the number of engagements directed and answered. Use the **Number of Holds** measure to determine the number of times that the engagements were put on hold by the agent.

- How do you determine the usage of routing services for the current interval?

  Generate reports using different intervals. Analyze the usage pattern of routing services and associated channels for different intervals to gain an insight on the usage pattern of the routing services.

- How do you determine the reason for the segment type of a call?

  Drill down to **Agent Interaction Details** report. Use the **Segment Type** measure to determine the reason of the segment type of a call.

- How do you determine whether the supervisor has barged-out the agent from the call?

  Drill down to **Agent Interaction Details** report. Use the **Barged Out Indicator** measure to determine whether the supervisor has removed the agent from the call.

- How do you interpret Transferred drill down value from **Agent By Routing Service** report?

  As count of transfers initiated or answered by agent within the reporting period. After drilling down from **Transferred** value into **Agent Interaction Details** report, the number of segments displayed is generally equal to the value clicked. When the agent accepts transfer and transfers it again, the **Transferred** value is equal to 2 and only one agent segment is created. This is design intent.

- How do you compare the performance of agents on different parameters in the routing service for the current interval?

  Select the agents that you want to compare. Then, select the various measures and intervals to view data of the selected agents. For example, use the **Offered** and **Answered** measures to determine the number of engagements directed and answered. Use the **Number of Holds** measure to determine the number of times that the engagements were put on hold by the agent.

Agent Configuration

Definition

Displays agent information and agent properties.

How it works

Supervisors can view this report to understand the properties configured for the agent. Properties include channels assigned to the agent and the number of engagements per channel that the agent can handle. You can click on an Agent ID to view Agent Attributes.

Business usage

- How do I determine the channels assigned to the agent?

  Use the **Channel ID** measure to understand the channels assigned to the agent.

- How do I determine the number of concurrent contacts that can be active on an account?

  Use the **Multiplicity** measure to determine the concurrent contacts that can be active on an account.

- How do I determine the routing attributes for an agent?

  On the **Agent Configuration** report, click on the agent. On the **Agent Configuration Attributes**, use the **Attribute** measure to determine the routing attributes for the agent.

Agent Login/Logout Summary

Definition

Displays agent login and logout information

How it works

Supervisors can view this report to see each login and logout event for each agent, as well as the log on duration for each session.

Business usage

Allows a supervisor to monitor the login and logout behavior of their agents:

- How often do my agents log in or out?

  Each log in and log out event is recorded in the report. Therefore, the supervisor can check the number of times an agent logs in or logs out on a Daily, Weekly, Monthly or Yearly basis.
- How long do my agents spend logged in?

  Use the **Agent Logon Duration** measure to see how long the agent spent logged in during that session.
- How do I see the status of my agent's logon?

  Add the custom **Status** column to the **Agent Login/Logout** report.
- How do I see if my agents are currently logged in?

  If an agent is currently logged in, the **Logon TIMESTAMP WITH TIMEZONE** measure is filled in on the report, but the **Logout TIMESTAMP WITH TIMEZONE** and **Logon Duration** measures are not filled. The custom **Status** measure shows the value **0**, which specifies that the agent is currently working.
- What is the maximum data retention period for the Agent Login/Logout Summary report?

  The maximum value is 12 months. This data retention period is configurable.

Agent Not Ready By Reason Code

Definition

Displays the reason code associated with the agent Not Ready (aux.) state.

How it works

Tracks the agent activity associated with the agent Not Ready (aux.) state. Supervisors can view and analyze the reason codes that the agents assign to the Agent Not Ready state for a selected interval. Intervals are aggregated by 15 minutes and can be Daily, Weekly, Monthly, or Yearly. Data displayed is listed at agent level, and data is written to the database every 15 minutes.

Business usage

- How many agents are showing the same not ready reason codes and not ready reasons for the selected interval?

  Sort by the **Not Ready Reason Code** and **Not Ready Reason** measures to determine the same codes used by the agents.
- Which are the top reason codes that agents use?

  Use the **Not Ready Reason Code** measure to determine the most used reason codes by the agents for the selected interval.
- Are agents utilizing the same reason codes multiple times?

  Use the **Agent ID**, **Agent User Handle**, and **Not Ready Reason Code** measures to determine whether agents are using the same codes multiple times in the selected interval.
- Which reason codes are used most by the agents, and what is the maximum duration of these codes?

  Sort by the **Not Ready Reason Code** measure to determine the codes that have maximum usage and view the **Total Duration** measure to determine the duration that agents spent in the Not Ready (aux.) state for the selected interval.
- Are agents exceeding the thresholds defined for each reason code for the selected interval?

  Use the **Agent ID**, **Agent User Handle**, and **Not Ready Reason Code** measures to determine the reason codes used by agents. Correlate these measures with the **Total Duration** measure to determine whether agents are exceeding their threshold.
- Which codes are used most by the agents and which code has maximum occurrences for the selected interval?

  Sort by the **Not Ready Reason Code** measure to determine the codes that have maximum usage. Correlate it with **Occurrences** to determine the maximum occurrences of the code.

Agent Performance

Agent Performance Summary

Definition

Displays the performance and productivity of an agent by Channels for the current interval.

How it works

Tracks how agents handle contacts delivered to them for the current interval. Supervisors can view how the agents handle contacts delivered to them for a selected interval. Intervals are aggregated by 15 minutes and can be either an Interval, Daily, Weekly, Monthly or Yearly. Data displayed is listed at agent level and data is written to the database every 15 minutes.

You can drill down on an agent to view the **Agent Details** report. This report provides agent performance at a detail level.

You can drill down on Abandoned, Completed, Conferenced, Offered, Transferred, Not Answered, Consulted, and Number of Holds measures to view the **Agent Interaction Detail** report. This report provides agent interactions for the selected measure. All timestamps pertaining to this report are displayed in UTC time format only.

Business usage

Monitor and compare the performance of each agent for the selected interval to view how the agents use their time. This report provides answers to some key questions, such as:

- How many contacts were offered to an agent and how many of these contacts were completed for the selected interval?

  Use the **Offered** measure to determine the number of contacts directed towards the agent for the selected interval. Use the **Completed** measure to determine the number of completed contacts.

- How many contacts did an agent handle for the selected interval duration, and what is the duration for which each contact was handled?

  Use the **Completed** measure to determine the number of contacts handled by the agent.

  Drill down on the agent and use the **Active Time** measure to determine the active duration spent by the agent to handle the contacts.

- How many contacts did an agent put on hold for the selected interval?

  Drill down on the agent and use the **Hold Count** measure to determine the number of contacts put on hold by the agent for the selected interval.

- How many contacts did an agent transfer to other agents for the selected interval duration?

  Drill down on the agent to **Agent Details.** Hover the mouse over the **Transferred** measure in the **Agent Performance Counts** view to determine the number of contacts transferred by the agent to other agents for the selected interval.

- How do you compare the active duration and idle duration of an agent for the selected time interval?

  Compare the **Active Time** measure with the **Idle Time** measure to determine the time spent by an agent in idle state in relation to active state. You can also use the **Average Active Time** measure to know the average active time spent by the agent.

- How do you compare the agent's performance for the current interval with other similar time intervals?

  Compare the number of contacts offered and the number of contacts completed and answered with escalations with other similar time intervals to determine the agent's performance.

- Is there an improvement in the performance of the agent?

  Compare the agent's performance in the current interval with data derived from other intervals to see if the performance of the agent is improving.

- How can you view the agent's performance at a glance for the selected intervals?

See the field **Grand Total** for all the measures in the table, or hover your mouse over the measures in **Agent Performance Counters**.

- How can you view the agent's blended engagement performance?

  Drill down to **Agent Details** report. See **Agent Performance Blended Engagements** View.

- How do you determine the reason for the segment type of a call?

  Drill down to **Agent Interaction Details** report. Use the **Segment Type** measure to determine the reason of the segment type of a call.

- How do you determine whether the supervisor has barged-out the agent from the call?

  Drill down to **Agent Interaction Details** report. Use the **Barged Out Indicator** measure to determine whether the supervisor has removed the agent from the call.

Agent Performance Top 5 and Bottom 5

Definition

Displays a performance summary of the top five and the bottom five agents for the current interval.

If more than five agents have the same values for metrics on which the agents are ranked, the report displays all such agents.

How it works

Tracks the performance of the contact center agents on a daily basis for the current interval. Intervals are aggregated by 15 minutes and can be either an Interval, Daily, Weekly, Monthly or Yearly. Data displayed is listed at agent level and data is written to the database every 15 minutes.

The Top 5 report is a daily report that shows the performance summary of the five agents who successfully completed the highest number of customer engagements.

The Bottom 5 report is a daily report that shows the performance summary of the five agents who completed the lowest number of customer engagements.

Business usage

Compare the performance of the top five and bottom five agents for the current interval to determine those agents who are using their active time productively and those who are not.

This report provides answers to some key questions, such as:

- How do the top five agents compare in answering the contacts for the current interval?

  Use the **Answered** measure to determine the number of contacts answered by the top five agents.

- How do the top five agents compare in using the answering time productively for the current interval?

  Use the **Active Time Duration** measure to determine and compare the time duration for which the agents were actively answering the calls.

- How do the top five agents compare in completing the contacts directed to them and the corresponding percentage of completion for the current interval?

Use the **Completed** and **% Complete** measure to determine and compare the call completion attribute of the agents.

- How many contacts did the top five agents not answer in the reporting period for the current interval?

  Use the **Not Answered** measure to determine and compare the contacts that were not answered by the agents.
- How do the bottom five agents compare in not answering the contacts for the current interval?

  Use the **Not Answered** measure to determine the number of contacts not answered by the bottom five agents.

Agent Compare

Definition

Displays a comparison of different agent measures.

How it works

Tracks performance of selected agents by comparing different agent measures in the current interval. Supervisors can select a maximum of five agents for comparing on different measures.

Business usage

- How many contacts were offered to agents in the current interval, and how many of these contacts were completed?

  Use the **Offered** and **Completed** measures to compare the performance of the agents.
- How many contacts were offered to agents in the current interval, and how many of these contacts were abandoned?

  Use the **Offered** and **Abandoned** measures to compare the number of contacts abandoned by the agents.
- How many contacts offered to the agents were transferred or conferenced since start of the day?

  Compare the **Transferred** and **Conferenced** measures with the **Offered** measures to know the count of contacts that were either transferred or conferenced for the current interval.

Agent Behaviour

Definition

Displays individual occurrences of agent behaviors that are associated with engagement handling activities.

How it works

Tracks how agents handle contacts delivered to them for the current interval. Supervisors can view the agent behaviors for the contacts delivered to them for a selected interval. Intervals are aggregated by 15 minutes and can be an Interval, Daily, Weekly, Monthly, or Yearly. Data displayed is listed at agent level and written to the database every 15 minutes.

This report includes counts for the following types of behaviors:

- Duration-based behaviors such as Short Not Ready (aux.) and % Long Holds. Counts for duration-based behaviors require an administered behavior definition that specifies a time duration.
- Event-based behaviors such as Transferred, Consults, and Answered that are counted automatically.

Business usage

- What percentage of calls are transferred or escalated (consults) by the agent for the selected interval?

  Use the **% Transferred** or **% Consults** measure to identify the calls that were transferred or escalated by the agent.
- What percentage of calls are kept on hold by the agent for longer durations for the selected interval?

  Use the **% Long Holds** measure to identify the agents who keep the calls on hold for durations longer than the company objectives.
- How do you identify the long engagements that exceed thresholds for the selected interval?

  Use the **% Long Engagements** measure to identify the agents who exceeded the company objectives.
- How do you identify the agent behaviors that meet or exceed the company objectives?

  View the counts of different measures to identify the agent's behavior.

Contact Center Performance Summary

Definition

Displays the performance summary of a contact center site.

How it works

Tracks behaviour aspects and contact activities of a contact center site for the selected interval. Intervals are aggregated by 15 minutes and can be either an Interval, Daily, Weekly, Monthly or Yearly. Supervisors can select the interval for reporting and track historical performance of the contact center.

This report contains the following summaries:

- Behaviour Summary: Provides information about the various types of agent behaviors that can have a significant impact on cost of service or customer satisfaction.
- Contact Summary: Provides information about the status of all contacts that dialed in to the contact center.

Note:

Avaya Analytics™ supports one site only.

Business usage

- How many contacts were offered to the given site for the selected interval and how many of them were transferred to an agent or a service?

  Use the **Offered** measure to determine the number of contacts offered to the selected site. Use the **Trans Initiate to Agent** and **Trans Initiate to Service** measures to determine the number of contacts that were transferred to an agent or a service.

- What does the high number of counts in the **Behaviour Summary** pie-chart indicate?

  Behaviour counts can be attributed to agent behaviour in a contact center and can be analyzed to determine whether agents need more training or if the efficiency of agents have reduced. It can also be used to analyze whether agents are performing certain actions that are greater than set goals of a contact center.

- How many contacts were offered to the given site for the selected interval and how many of them abandoned while in a queue and how many of them abandoned while alerting?

  Use the **Offered** measure to determine the number of contacts offered to the selected site. Use the **Abandoned From Queue** and **Abandoned from Alerting** measures to determine the number of contacts that abandoned from queue or abandoned from alerting.

- How many contacts were offered to the given site for the selected interval and what percentage of them abandoned while in a queue and what percentage of them abandoned while alerting?

  Use the **Offered** measure to determine the number of contacts offered to the selected site. Use the **% Abandoned From Queue** and **% Abandoned from Alerting** measures to determine the percentage of contacts that abandoned from queue or abandoned from alerting.

- How many contacts were offered to the given site for the selected interval and how many of them were answered and how many of them were not answered?

  Use the **Offered** measure to determine the number of contacts offered to the selected site. Use the **Answered** and **Not Answered** measures to determine the number of calls answered and number of calls unanswered.

- How many contacts were offered to the given site for the selected interval and how many of them were deferred by the agent?

  Use the **Offered** measure to determine the number of contacts offered to the selected site. Use the **% Answered** and **% Not Answered** measures to determine the percentage of calls answered or unanswered.

- How many contacts were offered to the given site for the selected interval and how many of them were deferred by the agent?

  Use the **Offered** measure to determine the number of contacts offered to the selected site. Use the **Deferred Contacts** measure to determine the contacts that the agent answered and subsequently deferred.

Engagement

Definition

Displays data related to customer engagements across various parameters.

How it works

Tracks historic details of all engagements. Supervisors can use these reports to determine the movement of customer engagements in a contact center. The start time of engagements determine the data displayed in the report.

Supervisors can track engagement details of routing services within the routing service group. Supervisors can only view routing services and routing service measures associated with the routing service group to which the supervisor is assigned.

You can drill down on Engagement ID to get finer details of each engagement. You can drill down on Contact ID to analyze how the engagement was handled at each segment level. An engagement is associated with a contact ID where as a segment is associated with an agent.

Business usage

- How do you determine the movement of a customer engagement in a contact center?

  Use **Engagement Summary Report** to understand the number of engagements that were listed in the current interval.

  Navigate to **Engagement Detail Report** to understand the details of the engagement. Navigate to **Contact Detail Report** to understand the details of segments, and segment durations of an engagement.
- How do you determine the usage of a channel across the contact center?

  In the Input prompt, select **TimeZone**, specify the values for the **Interval** and select the **Channel** for analysis. The report displays engagement details associated with the selected channel.

  Use the **Engagement Distribution By Channel** graph to determine the usage of channels across the contact center.
- How do you determine the duration of an engagement in a particular channel?

  In **Engagement Summary Report**, click an Engagement ID to display the **Engagement Contact Report**. Use the **Start Time** and **End Time** measures to determine the duration of the engagement in a particular channel.
- How do you determine the average engagement duration in the current interval?

  Use the **Average Engagement Duration** measure.
- For a given contact, how do you determine the duration the segment spent in agent activities?

  Use the **Segment Detail Report** along with **Segment Durations** graph to determine the duration spent for agent activities.

Contact Detail Summary

Definition

Displays the end-to-end details of a call.

How it works

Tracks historical details of a call including the agent who handled the call, the calling party, the handling time, and the alert time. The report also displays the routing service involved in the call. Supervisors can select the Contact ID in the Engagement Summary report to analyze how the agent handled the engagement at a segment level. An engagement is associated with contacts whereas a segment is associated with an agent.

Business usage

- How do you determine whether a caller was in a queue before getting connected to an agent?

  Use the **Wait Time Indicator** measure. If the value is **True**, then the contact was in a queue waiting to be connected to an agent.
- How do you determine if a contact was deferred?

  Use the **Deferred Indicator** measure. If the value is **True**, then the contact was deferred.
- How do you determine the duration an agent spends in a channel for a given segment?

  Use the **Engagement ID**, **Contact ID**, and **Agent ID** measures to determine the segment. Use the **Channel**, **Start Time**, and **End Time** to know the duration an agent spends in a channel.
- For a given contact, how do you determine the duration of the segment spent in agent activities?

  Use the Segment Detail Report with the Segment Durations graph to determine the duration spent on agent activities.
- How do you determine if an agent replied to a customer email?

  Use the **Reply Indicator** in the Contact Detail report. If the value is **True**, then the agent has replied to an email. The default value is **False**.
- What is the maximum data retention period of the Call Detail Records (CDR) data?

  The maximum retention period is 365 days. This data retention period is configurable.

Messaging Engagement Summary

Definition

Displays the data related to customer engagements originated on the Messaging channel across various parameters.

How it works

The report is similar to **Engagement** report. It tracks historical details of engagement originated on the Messaging channel. Supervisors can select the conversation and analyze how it traverses through multiple engagements. The start time of engagement determines the data displayed in the report.

You can drill down on Engagement ID to get finer details of each engagement. You can drill down on Contact ID to analyze how the engagement was handled at each segment level. Conversation ID is associated with a contact ID and an engagement is associated with a contact ID where as a segment is associated with an agent.

Business usage

- How do you determine the movement of a conversation thread in a contact center?

  Use **Messaging Engagement Summary Report** to understand the number of conversation threads that were listed in the current interval at Messaging channels.

  Navigate to **Conversation Detail Report** to understand the lifecycle details of the conversation thread, count of engagements of the conversation thread, total active time, and the list of engagements originated for it. Navigate to **Engagement Detail Report** to understand the details of the particular engagement of the conversation thread. Navigate to **Contact Detail Report** to understand the details of segments, and segment durations of an engagement.

- How do you determine contact center's services on which Messaging conversation threads are routed most frequently at some particular period?

  In the Input prompt, select **TimeZone** and specify the values for the Interval. The report displays conversation threads' details for the selected time interval.

  Use the **Top 5 Routing Services by Usage** graph to determine the usage of routing services across the contact center for a particular time interval.

- How do you determine usage of applications at Messaging channels at contact center?

  Use **Engagement distribution per Application** graph to identify usage of applications for messaging conversation threads at the particular time interval.

- How do you determine the duration of an engagement of a particular conversation thread?

  In **Messaging Engagement Summary Report**, click an Engagement ID to display **Engagement Contact Report**. Use the **Start Time** and **End Time** measures to determine the duration of the engagement in a particular channel.

- How do you determine the average engagement duration in the current interval?

  Use the **Average Engagement Duration** measure.

Routing Service Summary

Definition

Displays overall performance of a routing service for the selected interval.

How it works

Tracks the performance of the routing service for the current interval. Intervals are aggregated by 15 minutes and can be 15 Minutes, Hourly, Daily, Weekly, and Monthly.

Supervisors can select the routing services within a routing service group for reporting and track the channels' historical performance. Supervisors can only view routing services and routing service measures associated with the routing service group to which they are assigned.

This report displays routing services, their attributes, and channels through which a contact is routed and provides a snapshot of metric through a Pie chart View.

Business usage

Monitor and compare the performance of each Routing Service for the selected interval.

This report provides answers to some key questions, such as:

- How many contacts has a routing service offered, and how many agents were serviced by the routing service for the selected interval?

  Use the **Offered** measure to determine the number of contacts offered through the routing service. Use the **Agent Count** measure to determine the agents serviced by the routing service.
- How do you compare the usage of routing services by channels?

  Use the **Channel** measure to determine the usage of multichannel serviced by routing service.
- How do you determine the performance of a routing service for the selected interval?

  Use the **% Service Level** measure to determine the percentage of engagements with the routing service. Use the **% Occupancy** measure to determine the time spent by an agent in engagement service work for the routing service.
- How do you view the abandoned contacts across routing services?

  Click **Routing Service Summary - Contacts** tab. Input values on the page and click **Apply**. Hover the mouse over each pie in the Pie chart View.
- How do you know that the performance of the routing service is improving?

  Compare the routing service performance in the current interval with data derived from other intervals.

Supervisor

Supervisor Activity

Definition

Displays a summary of the supervisor’s activity for the current reporting interval.

How it works

Tracks the number of agents observed, barged out of contacts, and coached by the supervisor. Administrators can view the number of times that the supervisor observed the agents and provided coaching. For each supervisor, the report displays a Grand Total and a Sub Total.

From the Inputs prompt, you can filter reports by one or more supervisors.

Business usage

- How do you determine the number of agents that the supervisor was observing?

  Use the **Observing** measure to know the number of contacts where the supervisor was observing the agent.

- How do you know the number of agents that the supervisor was observing and provided coaching?

  Use the **Observing** measure to know the number of contacts for which the supervisor was observing the agent. Use the **Coaching** measure to know the number of contacts for which the supervisor provided coaching to the agent.

- How do you determine the number of agents a particular supervisor was observing, provided coaching to, or barging in on?

  Filter the report by Supervisor Name. Use the **Observing**, **Coaching**, and **Barged In** measures to determine the number of agents where the supervisor was observing, coaching, or barging in.

You can drill down on the **Observing**, **Coaching**, and **Barged-In** measures.

Supervised Agent Activity

Definition

Displays details of supervised agents and their behavior aspects in the current reporting interval.

How it works

Tracks how many agents were observed, barged out of contacts, and coached by the supervisor. Supervisors can view how the agents handle contacts delivered to them for a selected interval. This includes contacts that the agents transferred to other agents or service.

You can filter the report by:

- Agents: Displays details of the selected agents grouped by their reporting supervisor.
- Supervisor: Displays details for all agents reporting to each supervisor.
- Agent Group: Displays details for all agents in the group based on their reporting supervisor.

You can drill down on the **Coached**, **Observed**, and **Barged Out** measures.

Business usage

- How do you determine the number of contacts answered by the agent?

  Use the **Answered** measure to know the number of contacts answered by an agent.

- How do you determine the number of contacts that the supervisor observed or barged out the agent from the contacts?

  Use the **Observed** and **Barged Out** measures to know the number of contacts where the agent was observed or barged out of the contact.

- How do you know the number of contacts for which the agent was observed and coached?

Use the **Observed** measure to know the number of contacts for which the agent was observed. Use the **Coached** measure to know the number of contacts for which the agent was coached.

- How many contacts did the agent transfer to an agent or a service?

  Use the **Transferred to Agent** and **Transferred to Service** measures to know the contacts transferred to another agent or service.

Supervised Agent Compare

Definition

Displays a comparison of supervised agents for the current reporting interval.

How it works

Tracks activities of supervised agents by comparing agents on different measures in the current interval. Supervisors can select maximum five agents for this activity.

You can filter agents of your interest to see the comparison.

Filter the report by Agent Groups to limit the agents comparison in a group.

Business usage

- How do you compare the supervised agents that were observed and coached?

  Use the **Observed** and **Coached** measures to compare the activities of the supervised agents.
- How do you compare the supervised agents that were observed and removed from the call?

  Use the **Observed** and **Barged Out** measures to compare the activity of the supervised agents that were removed from the call.
- How many times did the supervisor intervene in the calls for the current interval?

  Use the **Barged In** measure to know the number of times the supervisor intervene in the calls.

Time Series

Definition

Displays the engagement of agents in a individual routing service for the current interval.

How it works

Tracks the overall trends in performance of agents and agent engagements associated with a routing service in a Routing Service Group against a set service level for the current interval.

Supervisors can select the routing services within a routing service group for reporting and track the channels' historical performance. Supervisors can only view routing services and routing service measures associated with the routing service group to which they are assigned.

Business usage

- How do you determine the usage of each channel for different measures in the current interval?

  View the **Engagements** trend graph and use different measures from the drop-down list to know the usage of each channel.

- How do you determine if the channel is approaching the defined service level for the current interval?

  View the **% Service Level** trend graph to know the percentage usage of each channel.

- How do you compare the usage of different channels for the current interval?

  View the **% Service Level** trend graph to know the percentage usage of each channel. Analyze the usage pattern of each channel.

- How do you determine what is happening at the routing point for the current interval?

  Use the **% Service Level** measure to understand the maximum service level reached. View the **Calls Abandoned After Threshold** measure to analyze the number of calls abandoned after the routing service reached its set threshold limit.

- How do you determine if the routing service is used to its fullest for the current interval?

  View the **% Service Level** measure to determine the calls offered through the routing service against the set service level.

VDN Summary

Definition

Displays overall performance of a routing point with respect to the customer experience.

This report supports route point reporting for calls that terminate in treatment VDNs or for callers who leave a message. Where Avaya Oceana® is non-operational, pre-existing agents are directed to fallback to Elite.

How it works

Tracks the performance of the routing point for the selected interval. Intervals are aggregated every 15 minutes and can be either a specific Interval or Daily, Weekly, and Monthly. Supervisors can select the routing points and routing point sub-type for reporting and track historical performance of the routing points.

Supervisors can use this report to compare routing points with respect to compliance with service level goals or to compare routing points with other measures.

This report supports the following routing points:

Route Point Type	SubType	Channels (Oceana®)
VDN	INGRESS, RONA, XFER2SERVICE, FALLBACK, COVERAGE, and TREATMENT	PSTN VOICE
RoutePoint	ROUTING, and XFER2SERVICE	OCP Channels

Business usage

- How many contacts were handled by the selected routing point and routing point sub-type for the selected interval, and how many of them were disconnected?

  Use the **Handled** measure to determine the number of contacts handled by the selected routing point and routing point subtype. Use the **Disconnects** measure to determine the number of contacts that were disconnected.

- How many contacts were handled by the selected routing point and routing pointy sub-type for the selected interval and how much time was required for routing?

  Use the **Handled** measure to determine the number of contacts handled by the selected routing point and routing point subtype. Use the **Routing Duration** measure to determine the routing duration of these contacts.

- How do you determine the performance of a routing point in the selected interval?

  Use the **Handled** measure to determine the number of contacts handled by the routing point. Use the **Routing Duration** measure along with other measures, such as **Disconnects** and **Average Wait Time**, to determine the performance of the routing point.

- How do you know that the performance of a routing point is improving?

  Compare the routing point performance in the current interval with data derived from other intervals.

Chapter 7: Historical reports daily summary overview

Using historical reports daily, you can generate reports for a week, month, or year based on with daily roll-up data. These report do not include data for the current day, because the data is calculated only the next day. The data retention period for these reports is configurable. The maximum data retention period for these reports is 60 months.

The historical reports based on daily roll-ups available in Avaya Analytics™ are:

- Account By Agent Daily
- Agent By Routing Service Daily
- Agent Not Ready by Reason Code Daily
- Agent Performance Summary Daily
- Contact Center Daily
- Routing Service Daily
- Supervisor Activity Daily
- Time Series Daily
- VDN Summary Daily

For more detailed information about the measures, data, and reports that Avaya Analytics™ provides, see *Avaya Analytics™ Data Dictionary* available from the Avaya Support website at https://support.avaya.com.

This chapter provides a summary of the historical reports that are based on daily roll-up data, such as how each reports work and the respective business usage.

Account by Agent Daily Summary

Definition

Displays a summary of agents who handled the contacts for the accounts during the selected duration.

How it works

Tracks the performance of the contact center agents by account for the selected duration. The duration is rolled-up daily and can be either Daily, Weekly, Monthly or Yearly. Supervisors can select the agents to report on and analyze the performance of agents serving the accounts for the selected duration.

This report displays the accounts, their attributes, and the channels through which a contact is routed.

Business usage

- How many contacts were offered to the agent and for which accounts for the selected duration?

  Use the **Offered** measure to determine the number of contacts offered to the agent. Use the **Account ID** measure to determine the accounts serviced by the agent.
- How many accounts did the agent service for the selected duration?

  Use the **Account ID** measure to determine the accounts that the agent serviced.
- How do you determine the usage of channels by agent for the reporting period?

  Use the **Channel** measure to determine the number of channels that the agent supported while supporting an account. Use the **Active Time** measure to determine the active time spent by the agent for the selected channel.
- How do you determine the occupancy rate of the agent for each account for the selected duration?

  Use the **Account ID** measure to determine the accounts that the agent supported the most. Use the **Average Active Time** measure to determine the active time spent by the agent for the accounts.

Agent By Routing Service Daily

Definition

Displays how agents use routing services for the selected duration.

How it works

Tracks the performance of agents by channels associated with a routing service for the selected duration. The duration is aggregated daily and can be Daily, Weekly, Monthly, and Yearly.

Supervisors can select the routing services within a routing service group for reporting and track the channels' historical performance. Supervisors can only view routing services and routing service measures associated with the routing service group to which they are assigned.

Business usage

- How do you determine an agent performance by routing service for the selected duration?

  You can determine an agent's performance by analyzing the data in the agent's Offered, Abandoned, Answered, Transferred, and Consults measures.
- How do you determine the usage of channels by an agent for the selected duration?

  You can create a report by selecting the required routing service and corresponding channels. In the report, you can select the channels and determine the usage of each channel by the agent.

- How do you compare the performance of agents by routing services for the selected duration?

  Use the **Offered** and **Answered** measures to determine the number of engagements directed and answered. Use the **Number of Holds** measure to determine the number of times that the engagements were put on hold by the agent.
- How do you determine the usage of routing services for the selected duration?

  Generate reports using different intervals. Analyze the usage pattern of routing services and associated channels for different intervals to gain an insight on the usage pattern of the routing services.

Agent Not Ready By Reason Code Daily

Definition

Displays the reason code associated with the agent Not Ready auxiliary state.

How it works

Tracks the agent activity associated with the agent Not Ready auxiliary state. Supervisors can view and analyze the reason codes that the agents assign to the Agent Not Ready state for a selected duration. The duration is aggregated daily and can be Daily, Weekly, Monthly, or Yearly. Data displayed is listed at agent level, and data is written to the database on the next day.

Business usage

- How many agents are showing the same not ready reason codes and not ready reasons for the selected duration?

  Sort by the **Not Ready Reason Code** and **Not Ready Reason** measures to determine the same codes used by the agents.
- Which are the top reason codes that agents use?

  Use the **Not Ready Reason Code** measure to determine the most used reason codes by the agents for the selected duration.
- Are agents utilizing the same reason codes multiple times?

  Use the **Agent ID**, **Agent User Handle**, and **Not Ready Reason Code** measures to determine whether agents are using the same codes multiple times in the selected duration.
- Which reason codes are used most by the agents, and what is the maximum duration of these codes?

  Sort by the **Not Ready Reason Code** measure to determine the codes that have maximum usage and view the **Total Duration** measure to determine the duration that agents spent in the Not Ready auxiliary state for the selected duration.
- Are agents exceeding the thresholds defined for each reason code for the selected duration?

  Use the **Agent ID**, **Agent User Handle**, and **Not Ready Reason Code** measures to determine the reason codes used by agents. Correlate these measures with the **Total Duration** measure to determine whether agents are exceeding their threshold.

- Which codes are used most by the agents and which code has maximum occurrences for the selected duration?

  Sort by the **Not Ready Reason Code** measure to determine the codes that have maximum usage. Correlate it with **Occurrences** to determine the maximum occurrences of the code.

Agent Performance

Agent Performance Summary Daily

Definition

Displays the performance and productivity of an agent by Channels for the selected duration.

How it works

Tracks how agents handle contacts delivered to them for the selected duration. Supervisors can view how the agents handle contacts delivered to them for a selected duration. The duration is aggregated daily and can be either, Daily, Weekly, Monthly or Yearly. Data displayed is listed at agent level and data is written to the database the next day.

Business usage

Monitor and compare the performance of each agent for the selected duration to view how the agents use their time. This report provides answers to some key questions, such as:

- How many contacts were offered to an agent and how many of these contacts were completed for the selected duration.

  Use the **Offered** measure to determine the number of contacts directed towards the agent for the selected interval. Use the **Completed** measure to determine the number of completed contacts.

- How many contacts did an agent handle for the selected duration, and what is the duration for which each contact was handled?

  Use the **Completed** measure to determine the number of contacts handled by the agent.

- How do you compare the active duration and idle duration of an agent for the selected duration?

  Compare the **Active Time** measure with the **Idle Time** measure to determine the time spent by an agent in idle state in relation to active state. You can also use the **Average Active Time** measure to know the average active time spent by the agent.

- How do you compare the agent's performance for the current daily report with other similar daily reports?

  Compare the number of contacts offered and the number of contacts completed and answered with escalations with other similar durations to determine the agent performance.

- Is there an improvement in the performance of the agent?

Compare the agent performance in the selected duration with data derived from other durations to see if the performance of the agent is improving.

- How can you view the agent's performance at a glance for the selected duration?

  See the field **Grand Total** for all the measures in the table, or hover your mouse over the measures in **Agent Performance Counters**.

Agent Performance Top 5 and Bottom 5 Daily

Definition

Displays a performance summary of the top five and the bottom five agents for the selected duration.

If more than five agents have the same values for metrics on which the agents are ranked, the report displays all such agents.

How it works

Tracks the performance of the contact center agents on a daily basis for the selected duration. The duration is aggregated daily and can be either, Daily, Weekly, Monthly or Yearly. Data displayed is listed at agent level and data is written to the database the next day.

The Top 5 report is a daily report that shows the performance summary of the five agents who successfully completed the highest number of customer engagements.

The Bottom 5 report is a daily report that shows the performance summary of the five agents who completed the lowest number of customer engagements.

Business usage

Compare the performance of the top five and bottom five agents for the selected duration to determine those agents who are using their active time productively and those who are not.

This report provides answers to some key questions, such as:

- How do the top five agents compare in answering the contacts for the selected duration?

  Use the **Answered** measure to determine the number of contacts answered by the top five agents.

- How do the top five agents compare in using the answering time productively for the selected duration?

  Use the **Active Time Duration** measure to determine and compare the time duration for which the agents were actively answering the calls.

- How do the top five agents compare in completing the contacts directed to them and the corresponding percentage of completion for the selected duration?

  Use the **Completed** and **% Complete** measure to determine and compare the call completion attribute of the agents.

- How many contacts did the top five agents not answer in the reporting period for the selected duration?

  Use the **Not Answered** measure to determine and compare the contacts that were not answered by the agents.

- How do the bottom five agents compare in not answering the contacts for the selected duration?

  Use the **Not Answered** measure to determine the number of contacts not answered by the bottom five agents.

Agent Compare Daily

Definition

Displays a comparison of different agent measures.

How it works

Tracks performance of selected agents by comparing different agent measures in the selected duration. Supervisors can select a maximum of five agents for comparing on different measures.

Business usage

- How many contacts were offered to agents in the selected duration, and how many of these contacts were completed?

  Use the **Offered** and **Completed** measures to compare the performance of the agents.
- How many contacts were offered to agents in the selected duration, and how many of these contacts were abandoned?

  Use the **Offered** and **Abandoned** measures to compare the number of contacts abandoned by the agents.
- How many contacts offered to the agents were transferred or conferenced since start of the day?

  Compare the **Transferred** and **Conferenced** measures with the **Offered** measures to know the count of contacts that were either transferred or conferenced for the selected duration.

Agent Behavior Daily

Definition

Displays individual occurrences of agent behaviors that are associated with engagement handling activities.

How it works

Tracks how agents handle contacts delivered to them for the selected duration. Supervisors can view the agent behaviors for the contacts delivered to them for a selected duration. The duration is aggregated daily and can be Daily, Weekly, Monthly, or Yearly. Data displayed is listed at agent level and written to the database the next day.

This report includes counts for the following types of behaviors:

- Duration-based behaviors such as Short Not Ready (aux.) and % Long Holds. Counts for duration-based behaviors require an administered behavior definition that specifies a time duration.

- Event-based behaviors such as Transferred, Consults, and Answered that are counted automatically.

Business usage

- What percentage of calls are transferred or escalated (consults) by the agent for the selected duration?

  Use the **% Transferred** or **% Consults** measure to identify the calls that were transferred or escalated by the agent.
- What percentage of calls are kept on hold by the agent for longer durations for the selected duration?

  Use the **% Long Holds** measure to identify the agents who keep the calls on hold for durations longer than the company objectives.
- How do you identify the long engagements that exceed thresholds for the selected duration?

  Use the **% Long Engagements** measure to identify the agents who exceeded the company objectives.
- How do you identify the agent behaviors that meet or exceed the company objectives?

  View the counts of different measures to identify the agent's behavior.

Contact Center Performance Summary Daily

Definition

Displays the performance summary of a contact center site daily.

How it works

Tracks behavior aspects and contact activities of a contact center site for the selected duration. The duration is aggregated daily and can be either Daily, Weekly, Monthly or Yearly. Supervisors can select the duration for reporting and track historical performance of the contact center.

This report contains the following summaries:

- Behaviour Summary: Provides information about the various types of agent behaviors that can have a significant impact on cost of service or customer satisfaction.
- Contact Summary: Provides information about the status of all contacts that dialed in to the contact center.

Note:

Avaya Analytics™ supports one site only.

Business Usage

- How many contacts were offered to the given site for the selected duration and how many of them were transferred to an agent or a service?

  Use the **Offered** measure to determine the number of contacts offered to the selected site. Use the **Trans Initiate to Agent** and **Trans Initiate to Service** measures to determine the number of contacts that were transferred to an agent or a service.

- What does the high number of counts in the **Behaviour Summary** pie-chart indicate?

  Behaviour counts can be attributed to agent behaviour in a contact center and can be analyzed to determine whether agents need more training or if the efficiency of agents have reduced. It can also be used to analyze whether agents are performing certain actions that are greater than set goals of a contact center.

- How many contacts were offered to the given site for the selected duration and how many of them abandoned while in a queue and how many of them abandoned while alerting?

  Use the **Offered** measure to determine the number of contacts offered to the selected site. Use the **Abandoned From Queue** and **Abandoned from Alerting** measures to determine the number of contacts that abandoned from queue or abandoned from alerting.

- How many contacts were offered to the given site for the selected duration and what percentage of them abandoned while in a queue and what percentage of them abandoned while alerting?

  Use the **Offered** measure to determine the number of contacts offered to the selected site. Use the **% Abandoned From Queue** and **% Abandoned from Alerting** measures to determine the percentage of contacts that abandoned from queue or abandoned from alerting.

- How many contacts were offered to the given site for the selected duration and how many of them were answered and how many of them were not answered?

  Use the **Offered** measure to determine the number of contacts offered to the selected site. Use the **Answered** and **Not Answered** measures to determine the number of calls answered and number of calls unanswered.

- How many contacts were offered to the given site for the selected duration and how many of them were deferred by the agent?

  Use the **Offered** measure to determine the number of contacts offered to the selected site. Use the **% Answered** and **% Not Answered** measures to determine the percentage of calls answered or unanswered.

- How many contacts were offered to the given site for the selected duration and how many of them were deferred by the agent?

  Use the **Offered** measure to determine the number of contacts offered to the selected site. Use the **Deferred Contacts** measure to determine the contacts that the agent answered and subsequently deferred.

Routing Service Summary Daily

Definition

Displays overall performance of a routing service for the selected duration.

How it works

Tracks the performance of the routing service for the selected duration. The duration is aggregated daily and can be Daily, Weekly, and Monthly.

Supervisors can select the routing services within a routing service group for reporting and track the channels' historical performance. Supervisors can only view routing services and routing service measures associated with the routing service group to which they are assigned.

This report displays routing services, their attributes, and channels through which a contact is routed and provides a snapshot of metric through a Pie chart View.

Business usage

Monitor and compare the performance of each Routing Service for the selected duration.

This report provides answers to some key questions, such as:

- How many contacts has a routing service offered, and how many agents were serviced by the routing service for the selected duration?

  Use the **Offered** measure to determine the number of contacts offered through the routing service. Use the **Agent Count** measure to determine the agents serviced by the routing service.
- How do you compare the usage of routing services by channels?

  Use the **Channel** measure to determine the usage of multichannel serviced by routing service.
- How do you determine the performance of a routing service for a selected duration?

  Use the **% Service Level** measure to determine the percentage of engagements with the routing service. Use the **% Occupancy** measure to determine the time spent by an agent in engagement service work for the routing service.
- How do you view the abandoned contacts across routing services?

  Click **Routing Service Summary - Contacts** tab. Input values on the page and click **Apply**. Hover the mouse over each pie in the Pie chart View.
- How do you know that the performance of the routing service is improving?

  Compare the routing service performance in the selected duration with data derived from other durations.

Supervisor Daily

Supervisor Activity Daily

Definition

Displays a summary of the supervisor’s activity for the selected reporting duration.

How it works

Tracks the performance of the routing service for the selected duration. The duration is aggregated daily and can be Daily, Weekly, and Monthly.

Business usage

- How do you determine the number of agents that the supervisor was observing?

  Use the **Observing** measure to know the number of contacts where the supervisor was observing the agent.

- How do you know the number of agents that the supervisor was observing and provided coaching?

  Use the **Observing** measure to know the number of contacts for which the supervisor was observing the agent. Use the **Coaching** measure to know the number of contacts for which the supervisor provided coaching to the agent.

- How do you determine the number of agents a particular supervisor was observing, provided coaching to, or barging in on?

  Filter the report by Supervisor Name. Use the **Observing**, **Coaching**, and **Barged In** measures to determine the number of agents where the supervisor was observing, coaching, or barging in.

Supervised Agent Activity Daily

Definition

Displays details of supervised agents and their behavior aspects in the selected reporting duration.

How it works

Tracks how many agents were observed, barged out of contacts, and coached by the supervisor. Supervisors can view how the agents handle contacts delivered to them for a selected duration. This includes contacts that the agents transferred to other agents or service.

You can filter the report by:

- Agents: Displays details of the selected agents grouped by their reporting supervisor.
- Supervisor: Displays details for all agents reporting to each supervisor.
- Agent Group: Displays details for all agents in the group based on their reporting supervisor.

Business usage

- How do you determine the number of contacts answered by the agent?

  Use the **Answered** measure to know the number of contacts answered by an agent.

- How do you determine the number of contacts that the supervisor observed or barged out the agent from the contacts?

  Use the **Observed** and **Barged Out** measures to know the number of contacts where the agent was observed or barged out of the contact.

- How do you know the number of contacts for which the agent was observed and coached?

  Use the **Observed** measure to know the number of contacts for which the agent was observed. Use the **Coached** measure to know the number of contacts for which the agent was coached.

- How many contacts did the agent transfer to an agent or a service?

  Use the **Transferred to Agent** and **Transferred to Service** measures to know the contacts transferred to another agent or service.

Supervised Agent Compare Daily

Definition

Displays a comparison of supervised agents for the current reporting interval.

How it works

Tracks activities of supervised agents by comparing agents on different measures in the current interval. Supervisors can select maximum five agents for this activity.

You can filter agents of your interest to see the comparison.

Filter the report by Agent Groups to limit the agents comparison in a group.

Business usage

- How do you compare the supervised agents that were observed and coached?

  Use the **Observed** and **Coached** measures to compare the activities of the supervised agents.
- How do you compare the supervised agents that were observed and removed from the call?

  Use the **Observed** and **Barged Out** measures to compare the activity of the supervised agents that were removed from the call.
- How many times did the supervisor intervene in the calls for the scheduled duration?

  Use the **Barged In** measure to know the number of times the supervisor intervene in the calls.

Time Series Daily

Definition

Displays the engagement of agents with a routing service in a Routing Service Group for the selected duration.

How it works

Tracks the overall trends in performance of agents and agent engagements associated with a routing service against a set service level for the selected duration.

Supervisors can select the routing services within a routing service group for reporting and track the channels' historical performance. Supervisors can only view routing services and routing service measures associated with the routing service group to which they are assigned.

Business usage

- How do you determine the usage of each channel for different measures in the selected duration?

  View the **Engagements** trend graph and use different measures from the drop-down list to know the usage of each channel.
- How do you determine if the channel is approaching the defined service level for the selected duration?

  View the **% Service Level** trend graph to know the percentage usage of each channel.
- How do you compare the usage of different channels for the selected duration?

  View the **% Service Level** trend graph to know the percentage usage of each channel. Analyze the usage pattern of each channel.
- How do you determine what is happening at the routing point for the selected duration?

  Use the **% Service Level** measure to understand the maximum service level reached. View the **Calls Abandoned After Threshold** measure to analyze the number of calls abandoned after the routing service reached its set threshold limit.
- How do you determine if the routing service is used to its fullest for the selected duration?

  View the **% Service Level** measure to determine the calls offered through the routing service against the set service level.

VDN Summary Daily

Definition

Displays overall performance of a routing point with respect to the customer experience.

This report supports route point reporting for calls that terminate in treatment VDNs or for callers who leave a message. Where Avaya Oceana® is non-operational, pre-existing agents are directed to fallback to Elite.

How it works

Tracks the performance of the routing point for the selected duration. The duration is aggregated daily and can be either a Daily, Weekly, and Monthly. Supervisors can select the routing points and routing point sub-type for reporting and track historical performance of the routing points.

Supervisors can use this report to compare routing points with respect to compliance with service level goals or to compare routing points with other measures.

This report supports the following routing points:

Route Point Type	SubType	Channels (Oceana®)
VDN	INGRESS, RONA, XFER2SERVICE, FALLBACK, COVERAGE, and TREATMENT	PSTN VOICE
RoutePoint	ROUTING, and XFER2SERVICE	OCP Channels

Business usage

- How many contacts were handled by the selected routing point and routing point sub-type for the selected duration, and how many of them were disconnected?

  Use the **Handled** measure to determine the number of contacts handled by the selected routing point and routing point subtype. Use the **Disconnects** measure to determine the number of contacts that were disconnected.
- How many contacts were handled by the selected routing point and routing pointy sub-type for the selected duration and how much time was required for routing?

  Use the **Handled** measure to determine the number of contacts handled by the selected routing point and routing point subtype. Use the **Routing Duration** measure to determine the routing duration of these contacts.
- How do you determine the performance of a routing point?

  Use the **Handled** measure to determine the number of contacts handled by the routing point. Use the **Routing Duration** measure along with other measures, such as **Disconnects** and **Average Wait Time**, to determine the performance of the routing point.
- How do you know that the performance of a routing point is improving?

  Compare the routing point performance in the current duration with data derived from other duration.

Chapter 8: Historical reports monthly summary overview

Using historical reports monthly, you can generate reports for a month or year based on the monthly roll-up data. These reports do not include current month data, because the data is calculated the next month. The data retention period for these reports is configurable. The maximum data retention period for these reports is 9999 months.

The historical reports based on monthly roll-ups available in Avaya Analytics™ are:

- Account By Agent Monthly
- Agent By Routing Service Monthly
- Agent Not Ready by Reason Code Monthly
- Agent Performance Summary Monthly
- Contact Center Monthly
- Routing Service Monthly
- Supervisor Activity Monthly
- Time Series Monthly
- VDN Monthly

For more detailed information about the measures, data, and reports that Avaya Analytics™ provides, see *Avaya Analytics™ Data Dictionary* available from the Avaya Support website at https://support.avaya.com.

This chapter provides a summary of the historical reports that are based on monthly roll-up data, such as how each report works and their respective business usage.

Account by Agent Monthly Summary

Definition

Displays a summary of agents who handled the contacts for the accounts during the selected duration.

How it works

Tracks the performance of the contact center agents by account for the selected duration. The duration is rolled-up monthly and can be either Monthly or Yearly. Supervisors can select the agents to report on and analyze the performance of agents serving the accounts for the selected duration.

This report displays the accounts, their attributes, and the channels through which a contact is routed.

Business usage

- How many contacts were offered to the agent and for which accounts for the selected duration?

  Use the **Offered** measure to determine the number of contacts offered to the agent. Use the **Account ID** measure to determine the accounts serviced by the agent.
- How many accounts did the agent service for the selected duration?

  Use the **Account ID** measure to determine the accounts that the agent serviced.
- How do you determine the usage of channels by agent for the reporting period?

  Use the **Channel** measure to determine the number of channels that the agent supported while supporting an account. Use the **Active Time** measure to determine the active time spent by the agent for the selected channel.
- How do you determine the occupancy rate of the agent for each account for the selected duration?

  Use the **Account ID** measure to determine the accounts that the agent supported the most. Use the **Average Active Time** measure to determine the active time spent by the agent for the accounts.

Agent By Routing Service Monthly

Definition

Displays how agents use routing services for the selected duration.

How it works

Tracks the performance of agents by channels associated with a routing service for the selected duration. The duration is aggregated monthly and can be Monthly and Yearly.

Supervisors can select the routing services within a routing service group for reporting and track the channels' historical performance. Supervisors can only view routing services and routing service measures associated with the routing service group to which they are assigned.

Business usage

- How do you determine an agent performance by routing service for the selected duration?

  You can determine an agent's performance by analyzing the data in the agent's Offered, Abandoned, Answered, Transferred, and Consults measures.
- How do you determine the usage of channels by an agent for the selected duration?

  You can create a report by selecting the required routing service and corresponding channels. In the report, you can select the channels and determine the usage of each channel by the agent.

- How do you compare the performance of agents by routing services for the selected duration?

  Use the **Offered** and **Answered** measures to determine the number of engagements directed and answered. Use the **Number of Holds** measure to determine the number of times that the engagements were put on hold by the agent.

- How do you determine the usage of routing services for the selected duration?

  Generate reports using different intervals. Analyze the usage pattern of routing services and associated channels for different intervals to gain an insight on the usage pattern of the routing services.

Agent Not Ready By Reason Code Monthly

Definition

Displays the reason code associated with the agent Not Ready auxiliary state.

How it works

Tracks the agent activity associated with the agent Not Ready auxiliary state. Supervisors can view and analyze the reason codes that the agents assign to the Agent Not Ready state for a selected duration. The duration is aggregated monthly and can be Monthly or Yearly. Data displayed is listed at agent level, and data is written to the database on the next month.

Business usage

- How many agents are showing the same not ready reason codes and not ready reasons for the selected duration?

  Sort by the **Not Ready Reason Code** and **Not Ready Reason** measures to determine the same codes used by the agents.

- Which are the top reason codes that agents use?

  Use the **Not Ready Reason Code** measure to determine the most used reason codes by the agents for the selected duration.

- Are agents utilizing the same reason codes multiple times?

  Use the **Agent ID**, **Agent User Handle**, and **Not Ready Reason Code** measures to determine whether agents are using the same codes multiple times in the selected duration.

- Which reason codes are used most by the agents, and what is the maximum duration of these codes?

  Sort by the **Not Ready Reason Code** measure to determine the codes that have maximum usage and view the **Total Duration** measure to determine the duration that agents spent in the Not Ready auxiliary state for the selected duration.

- Are agents exceeding the thresholds defined for each reason code for the selected duration?

  Use the **Agent ID**, **Agent User Handle**, and **Not Ready Reason Code** measures to determine the reason codes used by agents. Correlate these measures with the **Total Duration** measure to determine whether agents are exceeding their threshold.

- Which codes are used most by the agents and which code has maximum occurrences for the selected duration?

  Sort by the **Not Ready Reason Code** measure to determine the codes that have maximum usage. Correlate it with **Occurrences** to determine the maximum occurrences of the code.

Agent Performance

Agent Performance Summary Monthly

Definition

Displays the performance and productivity of an agent by Channels for the selected duration.

How it works

Tracks how agents handle contacts delivered to them for the selected duration. Supervisors can view how the agents handle contacts delivered to them for a selected duration. The duration is aggregated monthly and can be either Monthly or Yearly. Data displayed is listed at agent level and data is written to the database the next month.

Business usage

Monitor and compare the performance of each agent for the selected duration to view how the agents use their time. This report provides answers to some key questions, such as:

- How many contacts were offered to an agent and how many of these contacts were completed for the selected duration.

  Use the **Offered** measure to determine the number of contacts directed towards the agent for the selected interval. Use the **Completed** measure to determine the number of completed contacts.

- How many contacts did an agent handle for the selected duration, and what is the duration for which each contact was handled?

  Use the **Completed** measure to determine the number of contacts handled by the agent.

- How do you compare the active duration and idle duration of an agent for the selected duration?

  Compare the **Active Time** measure with the **Idle Time** measure to determine the time spent by an agent in idle state in relation to active state. You can also use the **Average Active Time** measure to know the average active time spent by the agent.

- How do you compare the agent's performance for the monthly report with other similar monthly reports?

  Compare the number of contacts offered and the number of contacts completed and answered with escalations with other similar durations to determine the agent performance.

- Is there an improvement in the performance of the agent?

Compare the agent performance in the selected duration with data derived from other durations to see if the performance of the agent is improving.

- How can you view the agent’s performance at a glance for the selected duration?

  See the field **Grand Total** for all the measures in the table, or hover your mouse over the measures in **Agent Performance Counters**.

Agent Performance Top 5 and Bottom 5 Monthly

Definition

Displays a performance summary of the top five and the bottom five agents for the selected duration.

If more than five agents have the same values for metrics on which the agents are ranked, the report displays all such agents.

How it works

Tracks the performance of the contact center agents on a monthly basis for the selected duration. The duration is aggregated monthly and can be either Monthly or Yearly. Data displayed is listed at agent level and data is written to the database the next month.

The Top 5 report is a monthly report that shows the performance summary of the five agents who successfully completed the highest number of customer engagements.

The Bottom 5 report is a monthly report that shows the performance summary of the five agents who completed the lowest number of customer engagements.

Business usage

Monitor and compare the performance of each agent for the selected duration to view how the agents use their time. This report provides answers to some key questions, such as:

- How many contacts were offered to an agent and how many of these contacts were completed for the selected duration.

  Use the **Offered** measure to determine the number of contacts directed towards the agent for the selected interval. Use the **Completed** measure to determine the number of completed contacts.

- How many contacts did an agent handle for the selected duration, and what is the duration for which each contact was handled?

  Use the **Completed** measure to determine the number of contacts handled by the agent.

- How do you compare the active duration and idle duration of an agent for the selected duration?

  Compare the **Active Time** measure with the **Idle Time** measure to determine the time spent by an agent in idle state in relation to active state. You can also use the **Average Active Time** measure to know the average active time spent by the agent.

- How do you compare the agent's performance for the current daily report with other similar daily reports?

  Compare the number of contacts offered and the number of contacts completed and answered with escalations with other similar durations to determine the agent performance.

- Is there an improvement in the performance of the agent?

  Compare the agent performance in the selected duration with data derived from other durations to see if the performance of the agent is improving.
- How can you view the agent's performance at a glance for the selected duration?

  See the field **Grand Total** for all the measures in the table, or hover your mouse over the measures in **Agent Performance Counters**.

Agent Compare Monthly

Definition

Displays a comparison of different agent measures.

How it works

Tracks performance of selected agents by comparing different agent measures in the selected duration. Supervisors can select a maximum of five agents for comparing on different measures.

Business usage

- How many contacts were offered to agents in the selected duration, and how many of these contacts were completed?

  Use the **Offered** and **Completed** measures to compare the performance of the agents.
- How many contacts were offered to agents in the selected duration, and how many of these contacts were abandoned?

  Use the **Offered** and **Abandoned** measures to compare the number of contacts abandoned by the agents.
- How many contacts offered to the agents were transferred or conferenced since start of the month?

  Compare the **Transferred** and **Conferenced** measures with the **Offered** measures to know the count of contacts that were either transferred or conferenced for the selected duration.

Agent Behavior Monthly

Definition

Displays individual occurrences of agent behaviors that are associated with engagement handling activities.

How it works

Tracks how agents handle contacts delivered to them for the selected duration. Supervisors can view the agent behaviors for the contacts delivered to them for a selected duration. The duration is aggregated monthly and can be Monthly or Yearly. Data displayed is listed at agent level and written to the database on the next month.

This report includes counts for the following types of behaviors:

- Duration-based behaviors such as Short Not Ready (aux.) and % Long Holds. Counts for duration-based behaviors require an administered behavior definition that specifies a time duration.
- Event-based behaviors such as Transferred, Consults, and Answered that are counted automatically.

Business usage

- What percentage of calls are transferred or escalated (consults) by the agent for the selected duration?

  Use the **% Transferred** or **% Consults** measure to identify the calls that were transferred or escalated by the agent.
- What percentage of calls are kept on hold by the agent for longer durations for the selected duration?

  Use the **% Long Holds** measure to identify the agents who keep the calls on hold for durations longer than the company objectives.
- How do you identify the long engagements that exceed thresholds for the selected duration?

  Use the **% Long Engagements** measure to identify the agents who exceeded the company objectives.
- How do you identify the agent behaviors that meet or exceed the company objectives?

  View the counts of different measures to identify the agent's behavior.

Contact Center Performance Summary Monthly

Definition

Displays the performance summary of a contact center site monthly.

How it works

Tracks behavior aspects and contact activities of a contact center site for the selected duration. The duration is aggregated monthly and can be either Monthly or Yearly. Supervisors can select the duration for reporting and track historical performance of the contact center.

This report contains the following summaries:

- Behaviour Summary: Provides information about the various types of agent behaviors that can have a significant impact on cost of service or customer satisfaction.
- Contact Summary: Provides information about the status of all contacts that dialed in to the contact center.

Note:

Avaya Analytics™ supports one site only.

Business Usage

- How many contacts were offered to the given site for the selected duration and how many of them were transferred to an agent or a service?

  Use the **Offered** measure to determine the number of contacts offered to the selected site. Use the **Trans Initiate to Agent** and **Trans Initiate to Service** measures to determine the number of contacts that were transferred to an agent or a service.

- What does the high number of counts in the **Behaviour Summary** pie-chart indicate?

  Behaviour counts can be attributed to agent behaviour in a contact center and can be analyzed to determine whether agents need more training or if the efficiency of agents have reduced. It can also be used to analyze whether agents are performing certain actions that are greater than set goals of a contact center.

- How many contacts were offered to the given site for the selected duration and how many of them abandoned while in a queue and how many of them abandoned while alerting?

  Use the **Offered** measure to determine the number of contacts offered to the selected site. Use the **Abandoned From Queue** and **Abandoned from Alerting** measures to determine the number of contacts that abandoned from queue or abandoned from alerting.

- How many contacts were offered to the given site for the selected duration and what percentage of them abandoned while in a queue and what percentage of them abandoned while alerting?

  Use the **Offered** measure to determine the number of contacts offered to the selected site. Use the **% Abandoned From Queue** and **% Abandoned from Alerting** measures to determine the percentage of contacts that abandoned from queue or abandoned from alerting.

- How many contacts were offered to the given site for the selected duration and how many of them were answered and how many of them were not answered?

  Use the **Offered** measure to determine the number of contacts offered to the selected site. Use the **Answered** and **Not Answered** measures to determine the number of calls answered and number of calls unanswered.

- How many contacts were offered to the given site for the selected duration and how many of them were deferred by the agent?

  Use the **Offered** measure to determine the number of contacts offered to the selected site. Use the **% Answered** and **% Not Answered** measures to determine the percentage of calls answered or unanswered.

- How many contacts were offered to the given site for the selected duration and how many of them were deferred by the agent?

  Use the **Offered** measure to determine the number of contacts offered to the selected site. Use the **Deferred Contacts** measure to determine the contacts that the agent answered and subsequently deferred.

Routing Service Summary Monthly

Definition

Displays overall performance of a routing service for the selected duration.

How it works

Tracks the performance of the routing service for the selected duration. The duration is aggregated monthly and can be Monthly and Yearly.

Supervisors can select the routing services within a routing service group for reporting and track the channels' historical performance. Supervisors can only view routing services and routing service measures associated with the routing service group to which they are assigned.

This report displays routing services, their attributes, and channels through which a contact is routed and provides a snapshot of metric through a Pie chart View.

Business usage

Monitor and compare the performance of each Routing Service for the selected interval.

This report provides answers to some key questions, such as:

- How many contacts has a routing service offered, and how many agents were serviced by the routing service for the selected interval?

  Use the **Offered** measure to determine the number of contacts offered through the routing service. Use the **Agent Count** measure to determine the agents serviced by the routing service.

- How do you compare the usage of routing services by channels?

  Use the **Channel** measure to determine the usage of multichannel serviced by routing service.

- How do you determine the performance of a routing service for the selected interval?

  Use the **% Service Level** measure to determine the percentage of engagements with the routing service. Use the **% Occupancy** measure to determine the time spent by an agent in engagement service work for the routing service.

- How do you view the abandoned contacts across routing services?

  Click **Routing Service Summary - Contacts** tab. Input values on the page and click **Apply**. Hover the mouse over each pie in the Pie chart View.

- How do you know that the performance of the routing service is improving?

  Compare the routing service performance in the current interval with data derived from other intervals.

Supervisor Monthly

Supervisor Activity Monthly

Definition

Displays a summary of the supervisor's activity for the selected reporting duration.

How it works

Tracks the performance of the routing service for the selected duration. The duration is aggregated monthly and can be Monthly and Yearly.

From the Inputs prompt, you can filter reports by one or more supervisors.

Business usage

- How do you determine the number of agents that the supervisor was observing?

  Use the **Observing** measure to know the number of contacts where the supervisor was observing the agent.

- How do you know the number of agents that the supervisor was observing and provided coaching?

  Use the **Observing** measure to know the number of contacts for which the supervisor was observing the agent. Use the **Coaching** measure to know the number of contacts for which the supervisor provided coaching to the agent.

- How do you determine the number of agents a particular supervisor was observing, provided coaching to, or barging in on?

  Filter the report by Supervisor Name. Use the **Observing**, **Coaching**, and **Barged In** measures to determine the number of agents where the supervisor was observing, coaching, or barging in.

Supervised Agent Activity Monthly

Definition

Displays details of supervised agents and their behavior aspects in the selected reporting duration.

How it works

Tracks how many agents were observed, barged out of contacts, and coached by the supervisor. Supervisors can view how the agents handle contacts delivered to them for a selected duration. This includes contacts that the agents transferred to other agents or service.

You can filter the report by:

- Agents: Displays details of the selected agents grouped by their reporting supervisor.
- Supervisor: Displays details for all agents reporting to each supervisor.

- Agent Group: Displays details for all agents in the group based on their reporting supervisor.

You can drill down on the **Coached**, **Observed**, and **Barged Out** measures.

Business usage

- How do you determine the number of contacts answered by the agent?

  Use the **Answered** measure to know the number of contacts answered by an agent.

- How do you determine the number of contacts that the supervisor observed or barged out the agent from the contacts?

  Use the **Observed** and **Barged Out** measures to know the number of contacts where the agent was observed or barged out of the contact.

- How do you know the number of contacts for which the agent was observed and coached?

  Use the **Observed** measure to know the number of contacts for which the agent was observed. Use the **Coached** measure to know the number of contacts for which the agent was coached.

- How many contacts did the agent transfer to an agent or a service?

  Use the **Transferred to Agent** and **Transferred to Service** measures to know the contacts transferred to another agent or service.

Supervised Agent Compare Monthly

Definition

Displays a comparison of supervised agents for the selected reporting duration.

How it works

Tracks activities of supervised agents by comparing agents on different measures in the selected duration. Supervisors can select maximum five agents for this activity.

You can filter agents of your interest to see the comparison.

Filter the report by Agent Groups to limit the agents comparison in a group.

Business usage

- How do you compare the supervised agents that were observed and coached?

  Use the **Observed** and **Coached** measures to compare the activities of the supervised agents.

- How do you compare the supervised agents that were observed and removed from the call?

  Use the **Observed** and **Barged Out** measures to compare the activity of the supervised agents that were removed from the call.

- How many times did the supervisor intervene in the calls for the scheduled duration?

  Use the **Barged In** measure to know the number of times the supervisor intervene in the calls.

Time Series Monthly

Definition

Displays the engagement of agents associated with a routing service for the selected duration.

How it works

Tracks the overall trends in performance of agents and agent engagements with a routing service in a routing service group against a set service level for the selected duration.

Supervisors can select the routing services within a routing service group for reporting and track the channels' historical performance. Supervisors can only view routing services and routing service measures associated with the routing service group to which they are assigned.

Business usage

- How do you determine the usage of each channel for different measures in the selected duration?

  View the **Engagements** trend graph and use different measures from the drop-down list to know the usage of each channel.
- How do you determine if the channel is approaching the defined service level for the selected duration?

  View the **% Service Level** trend graph to know the percentage usage of each channel.
- How do you compare the usage of different channels for the selected duration?

  View the **% Service Level** trend graph to know the percentage usage of each channel. Analyze the usage pattern of each channel.
- How do you determine what is happening at the routing point for the selected duration?

  Use the **% Service Level** measure to understand the maximum service level reached. View the **Calls Abandoned After Threshold** measure to analyze the number of calls abandoned after the routing service reached its set threshold limit.
- How do you determine if the routing service is used to its fullest for the selected duration?

  View the **% Service Level** measure to determine the calls offered through the routing service against the set service level.

VDN Summary Monthly

Definition

Displays overall performance of a routing point with respect to the customer experience.

This report supports route point reporting for calls that terminate in treatment VDNs or for callers who leave a message. Where Avaya Oceana® is non-operational, pre-existing agents are directed to fallback to Elite.

How it works

Tracks the performance of the routing point for the selected duration. The duration is aggregated monthly and can be either Monthly or Yearly. Supervisors can select the routing points and routing point sub-type for reporting and track historical performance of the routing points.

Supervisors can use this report to compare routing points with respect to compliance with service level goals or to compare routing points with other measures.

This report supports the following routing points:

Route Point Type	SubType	Channels (Oceana®)
VDN	INGRESS, RONA, XFER2SERVICE, FALLBACK, COVERAGE, and TREATMENT	PSTN VOICE
RoutePoint	ROUTING, and XFER2SERVICE	OCP Channels

Business usage

- How many contacts were handled by the selected routing point and routing point sub-type for the selected duration, and how many of them were disconnected?

  Use the **Handled** measure to determine the number of contacts handled by the selected routing point and routing point subtype for the selected duration . Use the **Disconnects** measure to determine the number of contacts that were disconnected.

- How many contacts were handled by the selected routing point and routing pointy sub-type for the selected duration and how much time was required for routing?

  Use the **Handled** measure to determine the number of contacts handled by the selected routing point and routing point subtype for the selected duration . Use the **Routing Duration** measure to determine the routing duration of these contacts.

- How do you determine the performance of a routing point?

  Use the **Handled** measure to determine the number of contacts handled by the routing point in the selected duration . Use the **Routing Duration** measure along with other measures, such as **Disconnects** and **Average Wait Time**, to determine the performance of the routing point for the selected duration.

- How do you know that the performance of a routing point is improving?

  Compare the routing point performance in the scheduled duration with data derived from other duration.

Chapter 9: Call Profile reports overview

Call Profile reports

This chapter provides a summary of the Call Profile reports for a routing service. Using Call Profile reports, supervisors can view information about the calls of their routing services and routing service groups for a selected duration. The following Call Profile reports are available in Avaya Analytics™:

- Call Profile Abandoned
- Call Profile Active Time Duration
- Call Profile Answered
- Call Profile Waiting in Queue

The reports contain information such as whether a call was answered, the duration of a call, the duration for which a call was waiting in a queue, or whether a call was abandoned. You can dynamically select different metrics, ranging from 15-minute interval to yearly, and determine which channel ID recorded the least or maximum calls for a given duration and metric.

Supervisors can also compare call performance of the routing services in the routing service groups to which they are assigned. Using the information obtained from these reports, they can plan process improvements or make business decisions for their routing services.

For example, supervisors assigned to a specific routing services group can compare call performance of the routing services in that group using the Call Profile Abandoned and Call Profile Answered reports. Of the total number of offered calls, if the number of answered calls is higher than the number of abandoned calls, it indicates a healthy call performance in the routing services group. Alternatively, if the number of abandoned calls is higher for a routing services group, supervisors can plan strategies to improve call processes for that group.

Reports are displayed in a dossier format with additional, dynamic filtering capabilities. For example, you can click a bar in the Channel ID bar graph to view details only for that particular channel ID in the details table. Additionally, when you click a bar, the bar graphs update and display only those channel IDs that are associated with the selected bar.

You can apply additional filters by selecting all or some of the durations, metrics, and channel ID filters in the left or right panes of the report.

For more detailed information about the measures, data, and reports that Avaya Analytics™ provides, see *Avaya Analytics™ Data Dictionary* available from the Avaya Support website at https://support.avaya.com.

Limitation in Call Profile reports

To understand the limitation in Call Profile reports, consider the following scenario:

1. A call is offered in Avaya Analytics™.

2. The call is queued on Routing Service 1.
3. The call is removed from the queue on Routing Service 1 after one minute.
4. The call is now queued on Routing Service 2.
5. The call is answered on Routing Service 2 after it was waiting in a queue for one hour (or 60 minutes).
6. The call is transferred to Routing Service 3 after one minute.
7. The call is answered on Routing Service 3 and completed after two hours (120 minutes).

In the above scenario, a single call is transferred on three routing services. The call details display in the Call Profile reports as follows:

- Call Profile Abandoned: No call profile details
- Call Profile Waiting in Queue: 1 minute (step 3) + 1 hour (step 5) = 3660 seconds. This time displays for Routing Service 1, although for most of the time, the call was waiting in queue on Routing Service 2.
- Call Profile Answered: 1 minute (step 3) + 1 hour (step 5) = 3660 seconds. This time displays for Routing Service 2 where the call was answered (step 5).
- Call Proflie Active Time Duration: 1 minute (step 3) + 1 hour (step 5) + 1 minute (step 6) + 2 hours (step 7) = 10920 seconds. This time displays for Routing Service 1.

Call Profile Answered, Call Profile Waiting in Queue, and Call Profile Abandoned reports do not display accurate information when you run these reports on pre-4.1.1 data. These reports use measures that are only added in Release 4.1.1. The default value of pre-4.1.1 measures is `0` and, as a result, the reports display inaccurate data when you run them on pre-4.1.1 data.

Call Profile Abandoned

Definition

Displays a summary of the calls of a routing service that were abandoned during a selected duration.

How it works

Tracks the number of calls that were abandoned during a selected duration. Supervisors can use the information to compare different routing services and determine which routing service had the maximum number of abandoned calls.

Business usage

- How do you understand the call performance of routing services for a given duration?

  The Call Profile Abandoned report displays information about the number of calls that were abandoned for a given duration. For example, to view how many calls related to your routing services were abandoned in a given quarter, you can use the time filters to select the months of the quarter. Once you know which routing service registered the maximum number of abandoned calls, you can plan process improvements for that routing service.

- How do you know which channels of a routing service reported the maximum number of abandoned calls?

  The bar graphs in the report represent the channels of the selected routing service. Each color-coded bar represents a specific channel.

  Hover the mouse pointer over each of the bars to view the number of abandoned calls in that channel. You can view this information for different intervals and metrics. Once you determine which channel reported the maximum number of abandoned calls, you can plan process improvements for those channels.
- How does abandoned call information help organizations to make business decisions?

  An abandoned or unanswered call is similar to a missed opportunity, especially in sales or promotional services. The more the number of abandoned calls, the heavier the losses to an organization.

  For example, a particular routing service consistently reports high numbers of abandoned calls. In this case, supervisors need to find better strategies to improve call performance and mitigate the organization's risk of losses.
- How do you determine the call abandonment rate?

  Divide the number of abandoned calls by the total number of calls received for a particular routing service.
- Does the total number of abandoned calls include calls that were dropped while they were on hold, during alerting after a consultative transfer, or during alerting after a blind transfer a selected duration?

  In an abandoned call, the caller hung up the call before being answered by an agent. Hence, none of these situations adds up to the count of abandoned calls in the report.

Call Profile Active Time Duration

Definition

Displays a summary of the duration for which the calls were active for a routing service.

How it works

Tracks the number of calls that were active during a selected duration. Supervisors can compare the routing services within a routing service group and determine the minimum and maximum time spent on calls in each of these routing services.

Business usage

- How can supervisors improve call performance based on the information in the Call Profile Active Time Duration report?

  Compare the data of the calls that each routing service handles and their active duration within and across routing services. Use this comparison to take business decisions to improve and optimize call times, particularly for those routing services where the active times are excessively high.

- How do you determine whether the active call duration was on a higher side?

  Set a threshold limit for an active call duration. After the threshold, the calls can be deemed as long-duration calls.
- What risks do calls with long active time durations pose?

  When an active call lasts too long, the number of calls waiting in queue could significantly increase. There is also the risk of calls getting abandoned. You must review call active time durations for their routing services and find ways to reduce these times so that calls are not kept waiting for too long.

Call Profile Answered

Definition

Displays a summary of the calls of a routing service that were answered during a selected interval.

How it works

Tracks the number of calls that were answered. Supervisors can determine how many calls were answered for each of the routing services in a routing service group for a selected duration.

Business usage

- What is the significance of information displayed in this report?

  This report displays which routing services report the maximum number of calls answered within the shortest interval. Such calls with quick response times indicate a healthy call profile environment for that routing service. You can replicate this process in other routing services where the intervals of answered calls or the number of waiting and abandoned calls are high.
- How do you determine the best performing channel ID in terms of calls answered in the shortest interval?

  Hover the mouse pointer over each of the bars to view the type of channel and the number of answered calls. You can view this information for each of the channels for different intervals and metrics. Once you determine which channel reported the minimum number of answered calls, you can then plan process improvements for these channels to improve their answering rates.
- How do you calculate the service level of the calls associated with the routing services in your routing service groups?

  Divide the number of calls answered in `n` seconds by the total calls offered for the selected duration multiplied by 100.

  For example, if the total number of offered calls in a given month was 6000, of which the number of answered calls in `n` seconds was 5400, then the service level is calculated as:

  ```
  5400/6000 * 100 = 90
  ```

  A high service-level rate is an indicator of a healthy call performance standard.

Call Profile Waiting in Queue

Definition

Displays a summary of the calls of a routing service that were waiting in queue during a selected duration.

How it works

Tracks the number of calls that were queued. Supervisors can determine the maximum time that a call was waiting in a queue for a routing service.

Business usage

- How do you improve call performance based on the information in this report?

  In the bar graph, each color-coded bar represents a different channel. Hover the mouse pointer over each of the bars to view the type of channel, number of waiting calls, and their duration. View this information for different intervals and metrics. Once you determine which channel reported the maximum number of waiting calls, you can plan steps to improve and optimize call times, particularly for those routing services where the waiting times are excessively high.

- How do you determine which routing services have high customer satisfaction rates?

  Analyze the report to determine calls waiting in queue for the shortest duration in routing services. You can consider the routing service with the maximum number of such calls as having high customer satisfaction rates.

Chapter 10: Resources

Documentation

Title	Use this document to:	Audience
Overview		
Avaya Oceana® Solution Description	Know about tested product characteristics and capabilities, including product overview and feature descriptions, interoperability, performance specifications, security, and licensing requirements.	• Sales engineers • Business partners • Solution architects • Implementation engineers
Implementing		
Deploying Avaya Oceana®	Deploy Avaya Oceana®.	• Sales engineers • Business partners • Solution architects • Implementation engineers
Avaya Oceana® and Avaya Analytics™ Disaster Recovery	Know about how to restore Avaya Oceana® when a complete outage at the primary data center.	• Sales engineers • Business partners • Solution architects • Implementation engineers
Upgrading Avaya Oceana®	Upgrade Avaya Oceana®.	• Sales engineers • Business partners • Solution architects • Implementation engineers
Deploying Avaya Analytics™	Deploy Avaya Analytics™.	• Sales engineers • Business partners • Solution architects • Implementation engineers
Administering		

Table continues…

Title	Use this document to:	Audience
Administering Avaya Oceana®	Administer Avaya Oceana®.	• System administrators • Supervisors
Using		
Using Avaya Workspaces for Avaya Oceana®	Use Avaya Workspaces for Avaya Oceana®.	• Agents • Supervisors
Using Avaya Analytics™	Use the features and capabilities of Avaya Analytics™.	• Supervisors • Administrators • Report designers
Avaya Analytics™ Data Dictionary	Use historical and real-time measures in custom reports.	• Administrators • Report designer
Maintaining and Troubleshooting		
Maintaining and Troubleshooting Avaya Oceana®	Perform maintenance and troubleshooting procedures for routine maintenance and troubleshooting of Avaya Oceana®.	• Support personnel • Implementation engineers • Administrators
Maintaining and Troubleshooting Avaya Analytics™	Perform common maintenance functions of Avaya Analytics™ and use tools and utilities for troubleshooting of Avaya Analytics™.	• Support personnel • Implementation engineers • Administrators
Avaya Oceana® Alarms	View details about Avaya Oceana® alarms.	• Support personnel • Administrators

Finding documents on the Avaya Support website

Procedure

1. Go to https://support.avaya.com.
2. At the top of the screen, type your username and password and click **Login**.
3. Click **Support by Product** > **Documents**.
4. In **Enter your Product Here**, type the product name and then select the product from the list.
5. In **Choose Release**, select the appropriate release number.

   The **Choose Release** field is not available if there is only one release for the product.
6. In the **Content Type** filter, click a document type, or click **Select All** to see a list of all available documents.

For example, for user guides, click **User Guides** in the **Content Type** filter. The list only displays the documents for the selected category.

7. Click **Enter**.

Avaya Documentation Center navigation

For some programs, the latest customer documentation is now available on the Avaya Documentation Center website at https://documentation.avaya.com.

Important:

For documents that are not available on Avaya Documentation Center, click **More Sites** > **Support** on the top menu to open https://support.avaya.com.

Using the Avaya Documentation Center, you can:

- Search for keywords.

  To filter by product, click **Filters** and select a product.

- Search for documents.

  From **Products & Solutions**, select a solution category and product, and then select the appropriate document from the list.

- Sort documents on the search results page.
- Click **Languages** ( ) to change the display language and view localized documents.
- Publish a PDF of the current section in a document, the section and its subsections, or the entire document.
- Add content to your collection using **My Docs** ( ).

  Navigate to the **Manage Content** > **My Docs** menu, and do any of the following:

  - Create, rename, and delete a collection.
  - Add topics from various documents to a collection.
  - Save a PDF of the selected content in a collection and download it to your computer.
  - Share content in a collection with others through email.
  - Receive collection that others have shared with you.

- Add yourself as a watcher using the **Watch** icon ( ).

  Navigate to the **Manage Content** > **Watchlist** menu, and do the following:

  - Enable **Include in email notification** to receive email alerts.
  - Unwatch selected content, all content in a document, or all content on the Watch list page.

  As a watcher, you are notified when content is updated or deleted from a document, or the document is removed from the website.

- Share a section on social media platforms, such as Facebook, LinkedIn, and Twitter.
- Send feedback on a section and rate the content.

Note:

Some functionality is only available when you log in to the website. The available functionality depends on your role.

Training

The following courses are available for the Avaya Oceana® program.

Table 1: Sales Credentials

Course code	Course title	Course duration in hours	Delivery type
APSS – 1202 Avaya IX™ Contact Center Solutions for Sales			
41510W	Avaya IX™ Contact Center Portfolio Overview (for Sales)	0.75	Web-based Training
41550T	APSS Avaya IX™ Contact Center Solutions	1.0	Web-based Training
ALCC –2005 Avaya IX™ Voice and Digital Solutions for Sales			
41710W	The Avaya IX™ Contact Center Automated Story	0.50	Web-based Training
41410W	Selling Avaya Oceana®	0.75	Web-based Training
41400W	Selling Avaya Analytics™	0.50	Web-based Training
41480W	The Basics of Cost Justification and Selling Avaya Oceana® Using the ROI Tool	0.50	Web-based Training
41770W	Avaya Experience Portal and Proactive Outreach Manager (POM) for Sales	0.25	Web-based Training

Table 2: Pre-Sales Design

Course code	Course title	Course duration in hours	Delivery type
ACDS – 3480 Avaya Oceana® Design			
34210W	Avaya Oceana® Overview for Design	1.0	Web-based Training

Table continues…

Course code	Course title	Course duration in hours	Delivery type
34810W	Designing the Avaya Oceana® Part 1 of 3	1.0	Web-based Training
34820W	Designing the Avaya Oceana® Part 2 of 3	1.50	Web-based Training
34830W	Designing the Avaya Oceana® Part 3 of 3	1.50	Web-based Training
34800X	Avaya Oceana® Design Exam	1.50	Exam
ALRI-7001 Avaya Oceana® Product Release Information Collection			
39000W	Avaya Oceana® Release 3.8 Details for Pre-Sales	1.0	Portable Document Format (PDF)
39010W	Avaya Analytics™ Release 3.8 and 4.1 Details for Pre-Sales	1.0	PDF
39020W	Avaya Breeze® Snap-Ins for Avaya Oceana® R3.8 Details for Pre-Sales	1.0	PDF

Table 3: Technical Services Partner Credentials

Course code	Course title	Course duration in hours	Delivery type
ACIS – 7495 Avaya Oceana®			
74150V	Integrating Avaya Oceana® Core and Workspaces	40.0	Virtual Instructor-Led Training
7495X	Avaya Oceana® Integration Exam	1.50	Exam
ACSS-7497 Avaya Oceana®			
74550V	Supporting Avaya Oceana®	24	Virtual Instructor-Led Training
7497X	Avaya Oceana® Support Exam	1.75	Exam
ACSS-7498 Avaya Analytics ™ Insights			
74360V	Integrating and Supporting Avaya Analytics™ R4	40.0	Virtual Instructor-Led Training
74980X	Avaya Analytics™ Insights Integration and Support Exam	1.75	Exam

Table 4: Pre-requisite Courseware

Course code	Course title	Course duration in hours	Delivery type
77900W	Avaya Control Manager Training Bundle (5 courses 21900W, 77910W, 77920W, 77930W, 77940W)	5.50	Web-based Training
70160W	Avaya Breeze® Implementation and Support	30.0	Web-based Training

Table 5: End User, Programmer, Administration

Avaya Learning Center				
Course code	**Course title**	**Course duration in hours**	**Delivery type**	**Vanity Link for Attachment**
ALEU-5002 Avaya Oceana® End-User Training				
24020W	Using Avaya Workspaces for Avaya Oceana® - Agent	1.0	Web-based Training	https://www.avaya.com/oceana-agent
24040W	Using Avaya Workspaces for Avaya Oceana® - Supervisor	1.0	Web-based Training	https://www.avaya.com/oceana-supervisor
ALUC-4001 Avaya Breeze® Client SDK				
2410W	Customer Communications and Apps with Oceana® for Developers	3.0	Web-based Training	
ASDC-0010 Avaya Workspaces® Framework				
24150W	Creating Avaya Oceana® Workspaces Framework for Developers	2.0	Web-based Training	
24150W	Avaya Workspaces Framework R3 Test	1.0	Online Test	
ASAC-0010 Avaya Oceana® Administration				
21160W	Avaya Oceana® Fundamentals	0.5	Web-based Training	
24300V	Avaya Oceana® Administration Training	40.0	Virtual Instructor-Led Training	Attached with the sale
24300T	Administering Avaya Oceana® R3 Online Test	1.0	Online Test	

Table continues…

Avaya Learning Center				
Course code	**Course title**	**Course duration in hours**	**Delivery type**	**Vanity Link for Attachment**
24320W	Administering Avaya Oceana® - Basic	2.5	Web-based Training	https://www.avaya.com/Oceana-admin
ASAC-0022 Administering Avaya Analytic™ for Avaya Oceana®				
24380W	Administering Avaya Analytics™ for Oceana®	1.5	Web-based Training	https://www.avaya.com/Oceana-analyticsadmin
24310T	Administering Avaya Analytics™ R3 for Oceana® Basic Online Teat	1.0	Web-based Training	

Table 6: Other Miscellaneous Courseware

Course code	Course title	Course duration in hours	Delivery type	Vanity Link for Attachment
ALCC-0001 Avaya Workforce Optimization Select Integration with Avaya Oceana® Workspaces				
7014W	Integrating Avaya Workforce Optimization Select with Avaya Oceana® Workspaces	3.0	Web-based Training	
7014A	Avaya Workforce Optimization Select with Avaya Oceana® Workspaces Integration Assessment	1.0	Assessment	
70170W	Integrating Avaya Workspaces with Avaya Aura Call Center Elite	1.0	Web-based Training	
70170T	Avaya Workspaces for Elite Integration Online Test	1.0	Online Test	
71610W	Integrating POM with Avaya Oceana®	1.0	Web-based Training	
71610T	Proactive Outreach Manager with Avaya Oceana® Integration Online Test	1.0	Online Test	
ALEU-5005 Avaya Workspaces for Elite End User				
24120W	Using Avaya Workspaces for Elite – Agents	0.75	Web-based Training	https://www.avaya.com/elite-workspaces-agent

Table continues…

Course code	Course title	Course duration in hours	Delivery type	Vanity Link for Attachment
24140W	Using Avaya Workspaces for Elite – Supervisor	0.50	Web-based Training	https://www.avaya.com/elite-workspaces-supervisor

Support

Go to the Avaya Support website at https://support.avaya.com for the most up-to-date documentation, product notices, and knowledge articles. You can also search for release notes, downloads, and resolutions to issues. Use the online service request system to create a service request. Chat with live agents to get answers to questions, or request an agent to connect you to a support team if an issue requires additional expertise.

Using the Avaya InSite Knowledge Base

The Avaya InSite Knowledge Base is a web-based search engine that provides:

- Up-to-date troubleshooting procedures and technical tips
- Information about service packs
- Access to customer and technical documentation
- Information about training and certification programs
- Links to other pertinent information

If you are an authorized Avaya Partner or a current Avaya customer with a support contract, you can access the Knowledge Base without extra cost. You must have a login account and a valid Sold-To number.

Use the Avaya InSite Knowledge Base for any potential solutions to problems.

1. Go to http://www.avaya.com/support.
2. Log on to the Avaya website with a valid Avaya user ID and password.

   The system displays the Avaya Support page.
3. Click **Support by Product** > **Product-specific Support**.
4. In **Enter Product Name**, enter the product, and press `Enter`.
5. Select the product from the list, and select a release.
6. Click the **Technical Solutions** tab to see articles.
7. Select relevant articles.

Index

U

V

W