



Avaya Workforce Optimization

Ad Hoc Reports Guide

Release 15.2

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Manage ad hoc reports

Ad Hoc Reports in Workforce Optimization can be managed on the Ad Hoc Reports page, where you can create, edit, view, and delete the reports.

This chapter provides a basic overview on how to use Microsoft® SQL Server® Report Builder alongside Workforce Optimization.

Topics

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Ad Hoc Reports Overview

Ad Hoc Reports are created and edited using Microsoft® SQL Server® Report Builder, which is licensed along with Workforce Optimization.

To use the Report Builder effectively, you should already be familiar with its basic functionality. See the Microsoft SQL Server Report Builder documentation for specific information about how to use this Microsoft product.



Microsoft SQL Server Report Builder has the following browser-specific limitation:

The **Print** control used for printing HTML reports is *only* available in Internet Explorer for the Report Viewer.



There may be cases where ad hoc reporting may not satisfy all your reporting requirements. One example could be instances where the specific data that needs to be reported does not exist in the data model. Another example is when the performance of the specific ad hoc report (after applying the best practices and organizations mentioned in this guide) is insufficient, especially when processing large amounts of data. In these cases, custom reporting may be required.

AQM automated evaluations in Ad Hoc reports

You can generate Ad Hoc reports that include data from automated evaluations.

Due to the large amount of automated evaluations in the system, to avoid overloading the system, you should narrow down reports that include automated evaluation data as follows:

- Limit the report to specific employees
- Limit the report's time range (for example, up to one week).

User privileges

The following User Privileges in the Workforce Optimization Suite are required to access the Ad Hoc Reports feature:

- Framework > Reports > Access Ad Hoc Query
- Framework > Reports > View Ad Hoc Query

▼ Reports	
<input checked="" type="checkbox"/> Access Ad Hoc Query	Generic
▶ <input type="checkbox"/> Administer Report Schedules	Generic
<input type="checkbox"/> Configure Report Security	Generic
<input type="checkbox"/> Deploy Reports	Generic
<input checked="" type="checkbox"/> View Ad Hoc Query	Generic
▶ <input type="checkbox"/> View Report	Report

Report builder overview

Report Builder is the ad hoc reporting tool for Microsoft SQL Server and is licensed along with the Workforce Optimization Suite. When using the Report Builder in conjunction with the Workforce Optimization Suite, you can:

- **Create Reports** - When you create reports from the Ad Hoc Reports page, the SQL Server Report Builder launches. SQL Server Report Builder allows you to access the Query Designer to create queries. You then use the Report Builder to define the layout of your report. For example, you can modify the title, add tables, and include headers and footers. Once you have defined the queries and are happy with the layout and design of the report, you can save the report for future use.
- **Create Queries** - The Query Designer in SQL Server Report Builder allows you to create queries that pull the data from the database for reports. To create a query, add a Dataset to your Data Source. On the Dataset screen, launch the Query Designer to view Entities in a tree hierarchy, expand Entities to view related Entities and Fields, and create a query (potentially including filters and calculations). Save the Dataset containing the query.

Models

With the Ad Hoc Reporting, you can explore the data in the database using an open and easy-to-use interface.

The Report Builder contains **Models**, which are the layers that isolate customers from the technical structure of the database.

- A *model* is a logical collection of entities, folders, fields, aggregates, or predefined filters that is intended for a particular group of users.
- An *entity* is a logical collection of folders, fields, aggregates, or predefined filters that corresponds to one or more tables in the database.
- A *folder* is a logical collection of fields, aggregates, or predefined filters.
- A *field* corresponds to a data element or a function based on one or more data elements. Fields are selected to construct a query on the database. Once a query is performed, the fields are returned with corresponding values. Fields retrieve data that provides the basis for analysis in a report.
- An *Aggregate* is a field that retrieves the result of calculations in the database.
- A *filter* is used to focus your reports results on specific data. For example, a date range filter.

Related topics

[Workforce Management model](#), page 30

[Assessments model](#), page 70

[Contacts model](#), page 87

[Evaluations model](#), page 109

Manage ad hoc reports

The Ad Hoc Reports page allows you to create, edit, view, and delete ad hoc reports.

- 1 Log on to the Workforce Optimization Suite.
- 2 Select **Reports > Ad Hoc Reports**.

The Ad Hoc Reports page appears. The report packages (models) available to you are listed in the **Package Selection** pane.

- 3 Select the specific report package to be generated in the *Package Selection* pane.
Report Queries already saved display in the right pane.

Related topics

[Create a report](#), page 13

[Edit a report](#), page 21

[View a report](#), page 22

[Delete a report](#), page 22

Create a report

Use the Ad Hoc Reports page to create an Ad Hoc Report. When creating an ad hoc report, you will perform each of the following major steps. Detailed steps are provided in the Procedure.

Major Steps

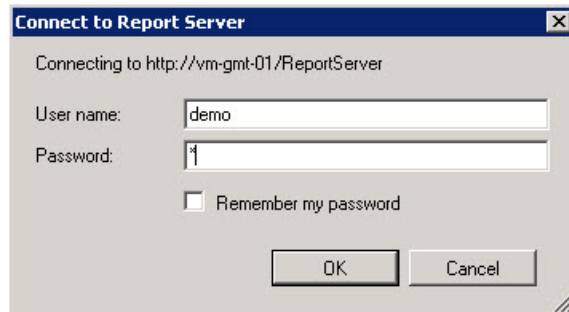
- Create the Report - On the Ad Hoc Reports page, click Create. This launches the SQL Server Report Builder.
- Create a Query - The Query Designer in SQL Server Report Builder allows you to create a query that pulls the data from the database for reports. To create a query, add a Dataset to the selected report package under Data Source. On the Dataset screen, launch the Query Designer to view Entities in a tree hierarchy, expand Entities to view related Entities and Fields, and create a query (potentially including filters and calculations). Save the Dataset containing the query.
- Modify Report Appearance - SQL Server Report Builder allows you to improve the layout of your report. For example, you can modify the title, add tables, and include headers and footers.
- View and Save the Report - View the report and save it for future use.
- For *Interactions and Analytics reports only*, assign your report to roles. To assign the report, deploy your report to the Reports application and then assign it to the relevant roles.

Procedure

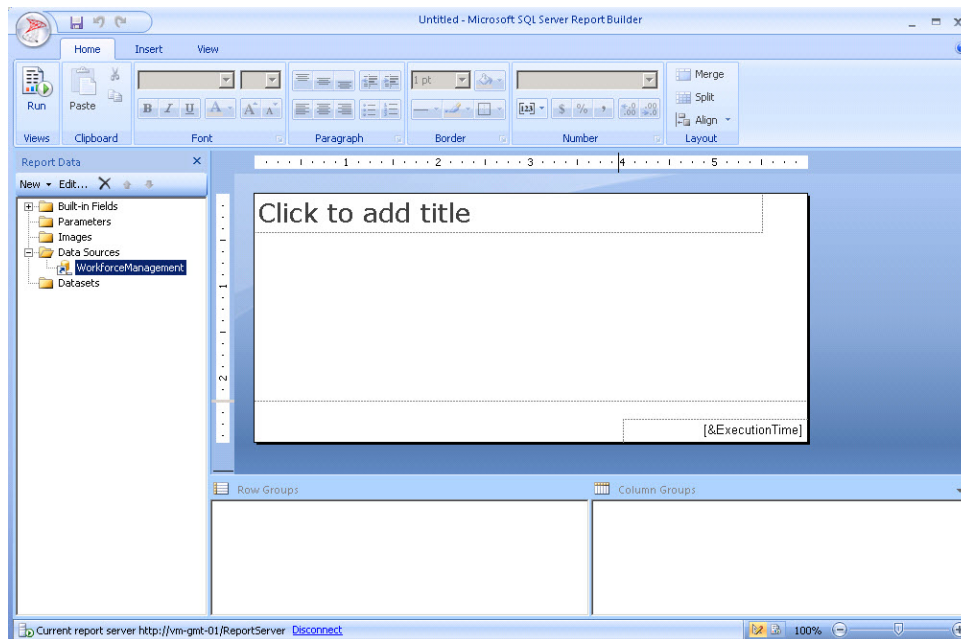
- 1 Log on to Workforce Optimization.
- 2 Select **Reports > Ad Hoc Reports**.
- 3 Select the specific report package (model) to be generated in the *Package Selection* pane.
- 4 Click **Create**.

If this is the first time you have accessed this functionality on the machine in use, Microsoft® SQL Server® Report Builder will take a moment to install and launch. If a dialog appears asking whether or not you would like to run the application, click **Run**.

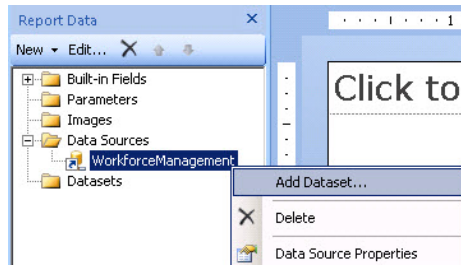
A dialog appears requiring you to provide logon credentials for the Report Server. These are the same logon credentials you used to log on to Workforce Optimization.



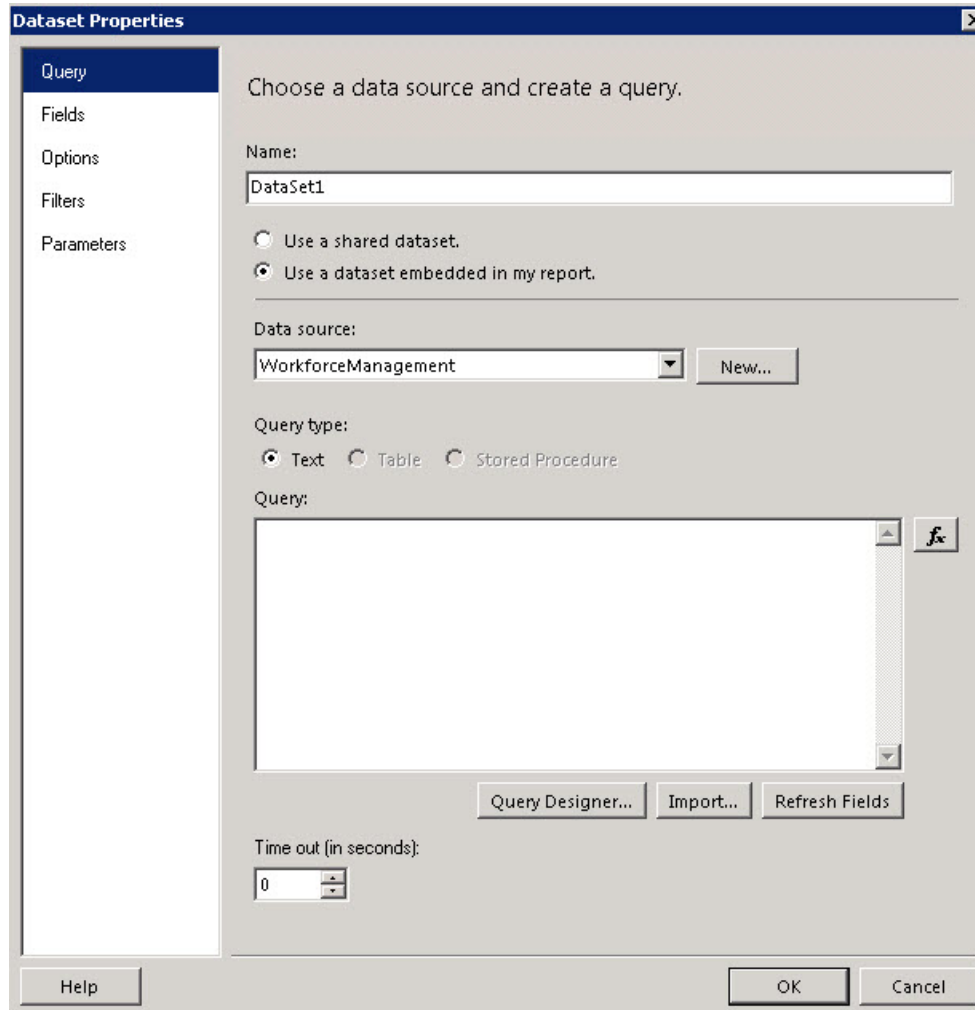
The Microsoft® SQL Server® Report Builder launches.



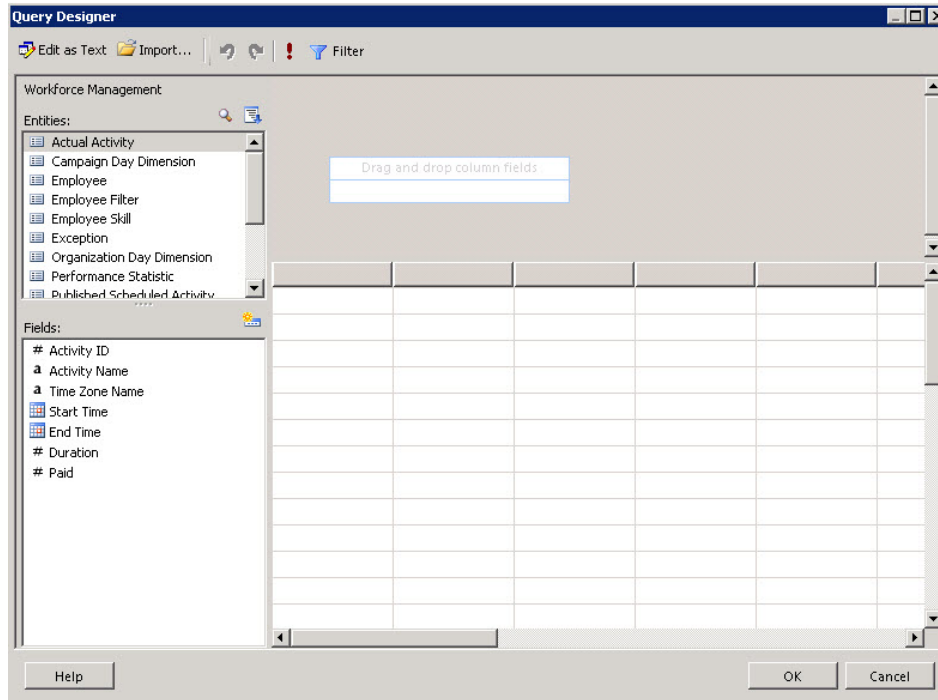
- 5 In the left pane, expand the **Data Sources** tree.
- 6 Right-click your model and select **Add Dataset**.




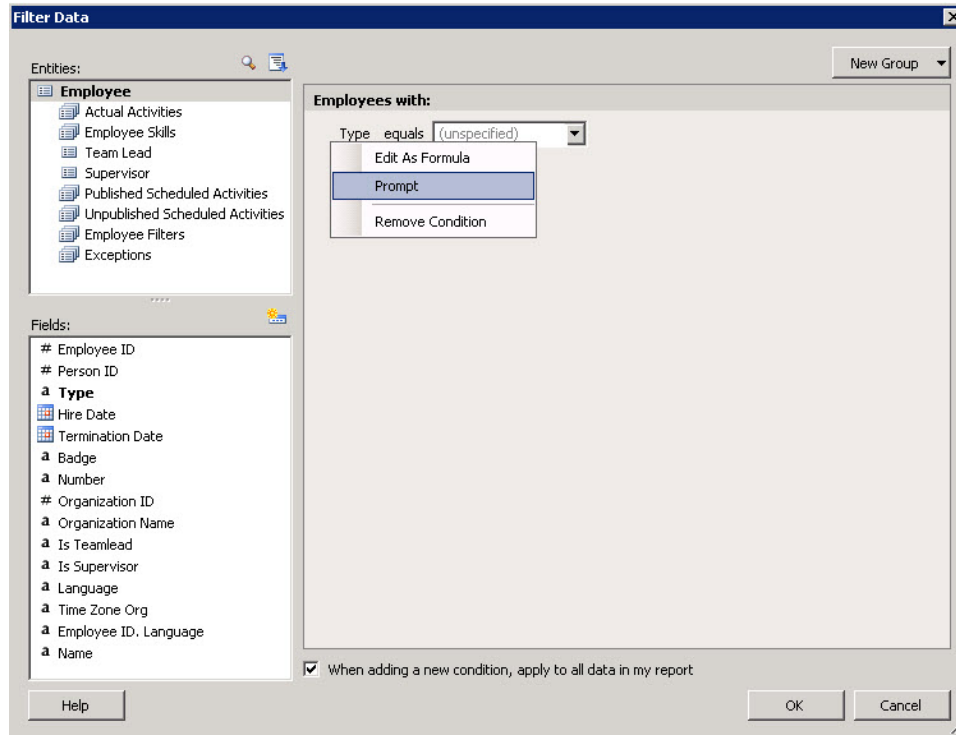
The Dataset Properties dialog appears.




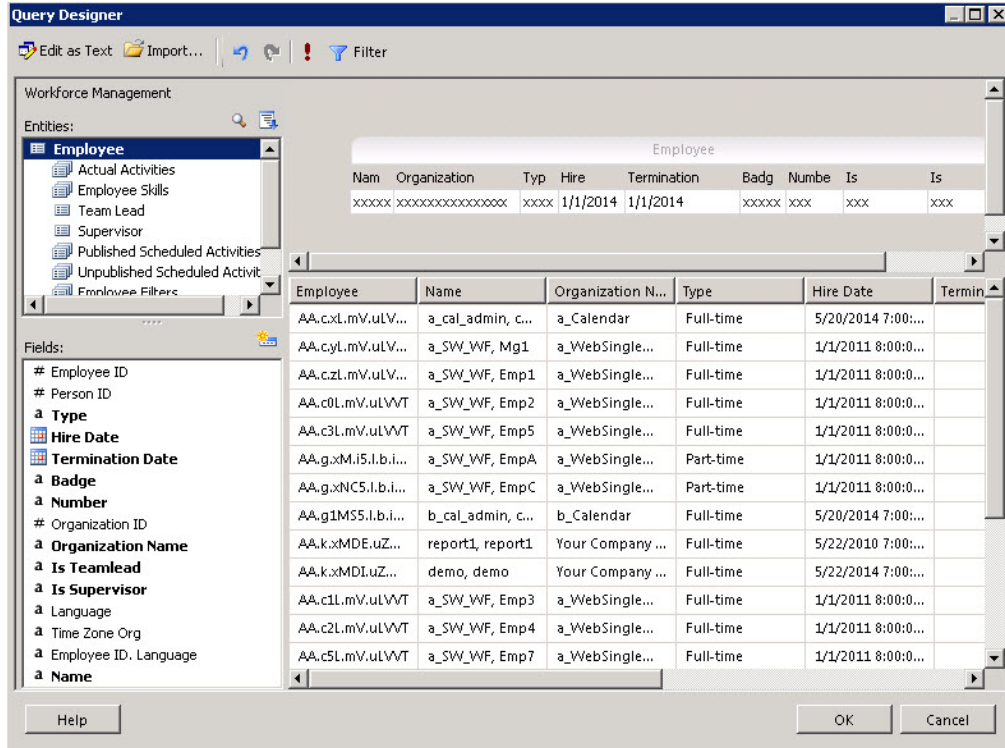
- 7 Click the **Query Designer** button located below the Query section of the dialog. The Query Designer appears.



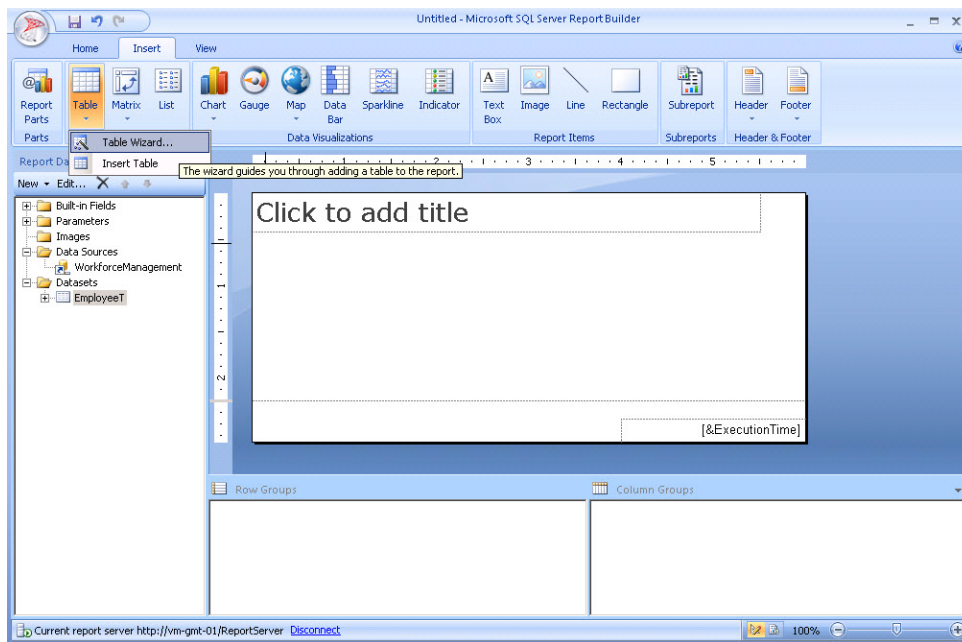
- 8 The **Entities** of the selected report package appear in the upper-left pane and the **Fields** associated with the selected Entity appear in the lower-left pane.
- 9 Double-click or drag and drop one or more Entities/Fields into the query in the upper-right pane.
- 10 Click the Filter icon  to add specific filters to the query. For example, a Prompt filter will create a prompt on the screen when running the report that allows the person running the report to select the applicable response. Ad Hoc Reports can affect overall system performance. You can limit the total number of records in use by the system via the effective use of Filters in your Dataset.



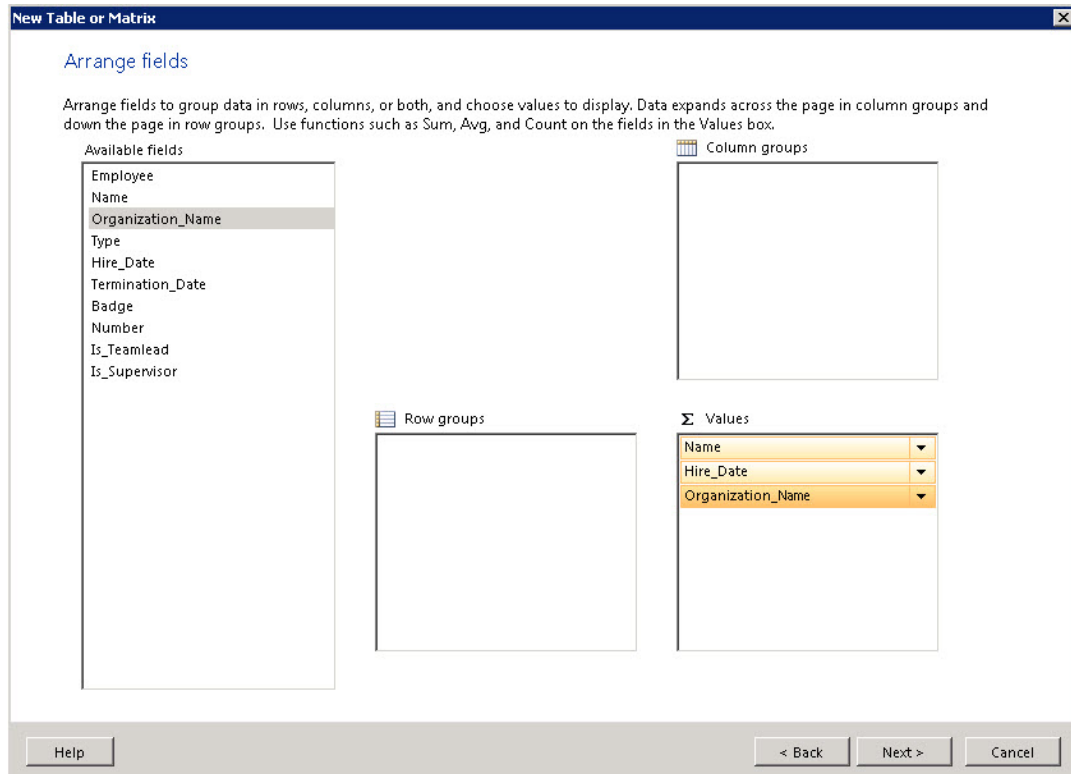
- 11 Click the exclamation point icon  to run the query. The grid in the lower-right pane displays the results of the query.



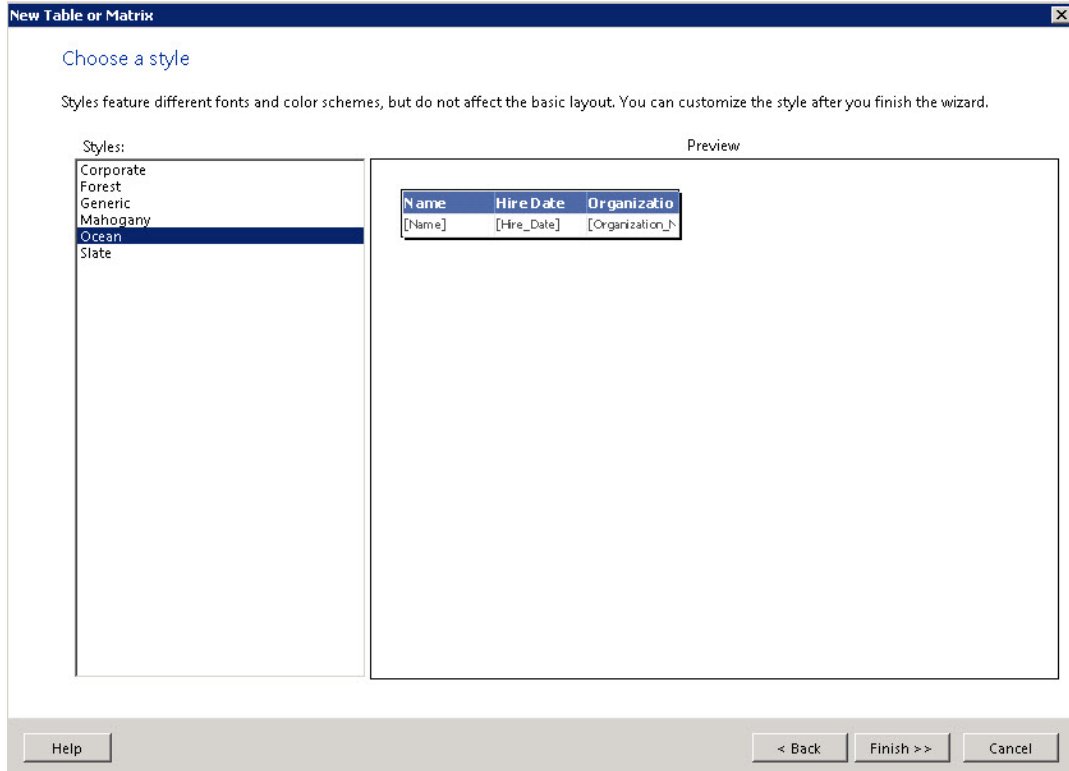
- 12 Click **OK** on the dialogs until you return to the Microsoft SQL Server Report Builder main screen and save the **Data Set**.
- 13 On the Microsoft SQL Server Report Builder main screen, select **Insert > Table > Table Wizard**.



- Click **Next** until you reach the Arrange Fields screen. This screen allows you to click and drag **Available fields** to the **Values** for the report display. Add all of the fields you wish to display and click **Next**.



- Choose the applicable style for the table and click **Next**.



16 Make any preferred visual adjustments to the report display (e.g., center the title and table, add headers and footers, etc.).

17 Click **Run**.



18 The Report runs. If you have created any Prompt filters, they display in the upper-left. Make any necessary Prompt selections and click **View Report**.



The report displays.

Type: Full-time View Report

Employees By Type

Name	Hire Date	Organization Name
a_ca_admin, caL_main	5/20/2014 7:00:00 AM	a_Calendar
a_SW_WF, Mq1	1/1/2011 8:00:00 AM	a_WebSingleW eek
a_SW_WF, Emp1	1/1/2011 8:00:00 AM	a_WebSingleW eek
a_SW_WF, Emp2	1/1/2011 8:00:00 AM	a_WebSingleW eek
a_SW_WF, Emp5	1/1/2011 8:00:00 AM	a_WebSingleW eek
b_ca_admin, caL_main	5/20/2014 7:00:00 AM	b_Calendar
report1, report1	5/22/2010 7:00:00 AM	Your Company Name
demo, demo	5/22/2014 7:00:00 AM	Your Company Name
a_SW_WF, Emp3	1/1/2011 8:00:00 AM	a_WebSingleW eek
a_SW_WF,	1/1/2011	a_WebSingleW

19 Save the report.

Reports should be saved in the **WFO/AdHoc** folder for public use or **My Reports** for private use.

For *Interactions and Analytics reports only*, save the report on the network. Note the location you saved the report for later when deploying the report to the Reports application.

A file is created with the **.rdl** extension.

20 For *Interactions and Analytics reports only*, assign roles to your report.

To assign roles, deploy your report to the Reports application and then assign it to the relevant roles.

Related topics

[Deploy and assign reports](#), page 159

Edit a report

Use the Ad Hoc Reports page to edit an existing Ad Hoc Report.

- 1** Log on to the Workforce Optimization Suite.
- 2** Select **Reports > Ad Hoc Reports**.
- 3** Select the report package to be edited in the *Package Selection* pane.
- 4** Select the Report you wish to edit in the right pane.
- 5** Click **Edit**.
- 6** A dialog appears requiring you to provide logon credentials for the Report Server. These are the same logon credentials you used to log on to the Workforce Optimization Suite.
The Microsoft® SQL Server® Report Builder launches.
- 7** Make any necessary changes to the report.
- 8** Click **Run**.
- 9** The Report runs. If you have created any Prompt filters, they display in the upper-left. Make any necessary Prompt selections and click **View Report**.

The report displays.

10 Save the report.

Reports should be saved in the **WFO/AdHoc** folder for public use or **My Reports** for private use.

For *Interactions and Analytics reports only*, save the report on the network. Note the location you saved the report for later when deploying the report to the Reports application.

View a report

Use the Ad Hoc Reports page to view an Ad Hoc Report.

- 1** Log on to the Workforce Optimization Suite.
- 2** Select **Reports > Ad Hoc Reports**.
- 3** Select the report package to be viewed in the *Package Selection* pane.
- 4** Select the Report you wish to view in the right pane.
- 5** Click **View**.
- 6** A dialog appears requiring you to provide logon credentials for the Report Server. These are the same logon credentials you used to log on to the Workforce Optimization Suite.
The Microsoft® SQL Server® Report Builder launches.
- 7** Click **Run**.
- 8** The Report runs. If there are any Prompt filters, they display in the upper-left. Make any necessary Prompt selections and click **View Report**.
The report displays.

Delete a report

Use the Ad Hoc Reports page to delete an Ad Hoc Report.

- 1** Log on to the Workforce Optimization Suite.
- 2** Select **Reports > Ad Hoc Reports**.
- 3** Select the report package to be deleted in the *Package Selection* pane.
- 4** Select the Report you wish to delete in the right pane.
- 5** Click **Delete**.
- 6** Confirm the deletion.

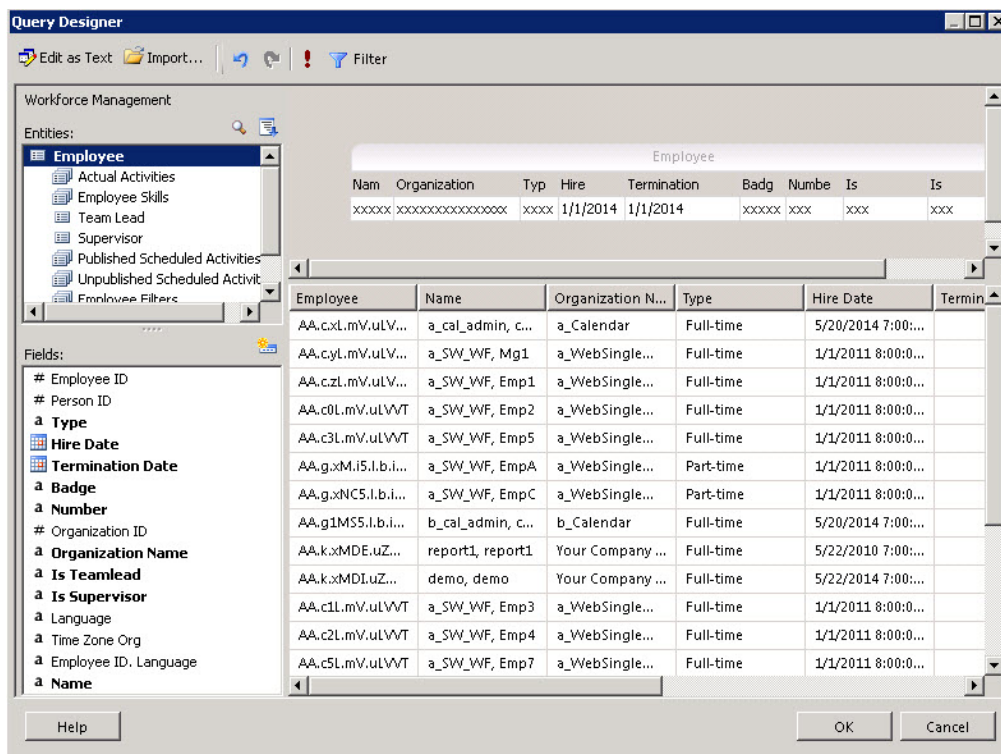
Basic use of query designer

The following are common uses within the Query Designer:

- [Add an entity or field to a query](#), page 23
- [Remove a field from a query](#), page 24
- [Create filters](#), page 24

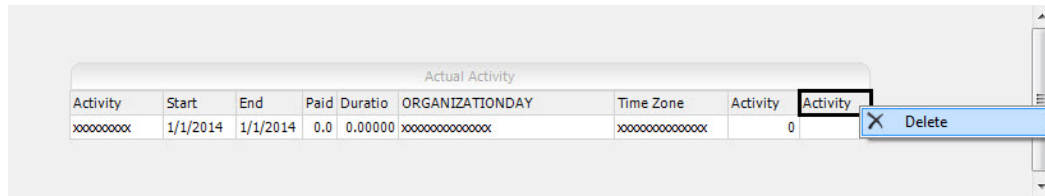
Add an entity or field to a query

Double-click or drag and drop an Entity or Field from the left panes to the query area in the upper-right pane.



Remove a field from a query

Right-click on the entity of field displayed in the query and click Delete.

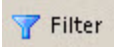


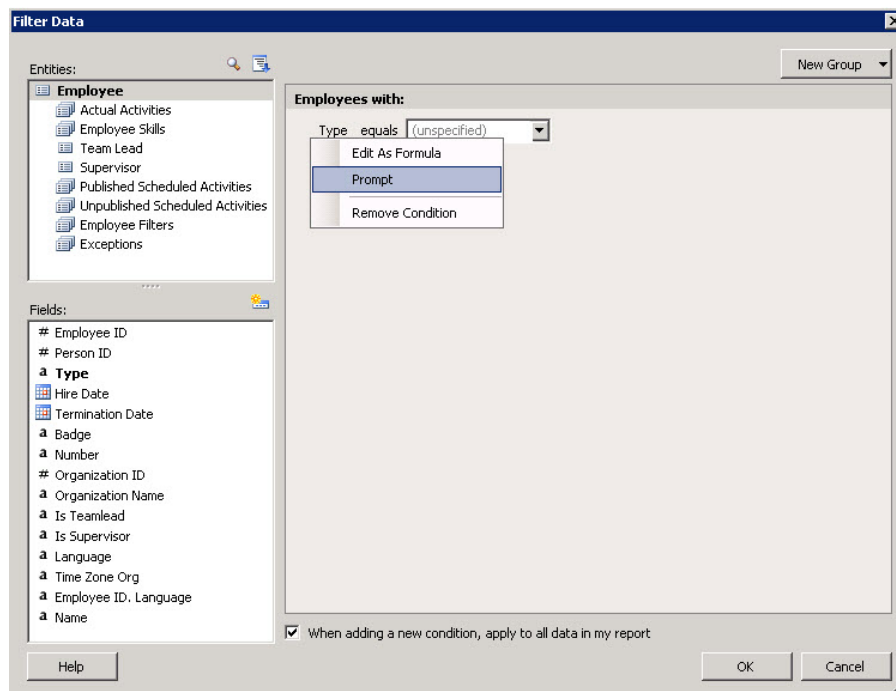
Create filters

Create optimal filters for your query.

It is recommended to use at least one indexed field when creating filters for a query. Selecting an indexed field improves performance.

Procedure

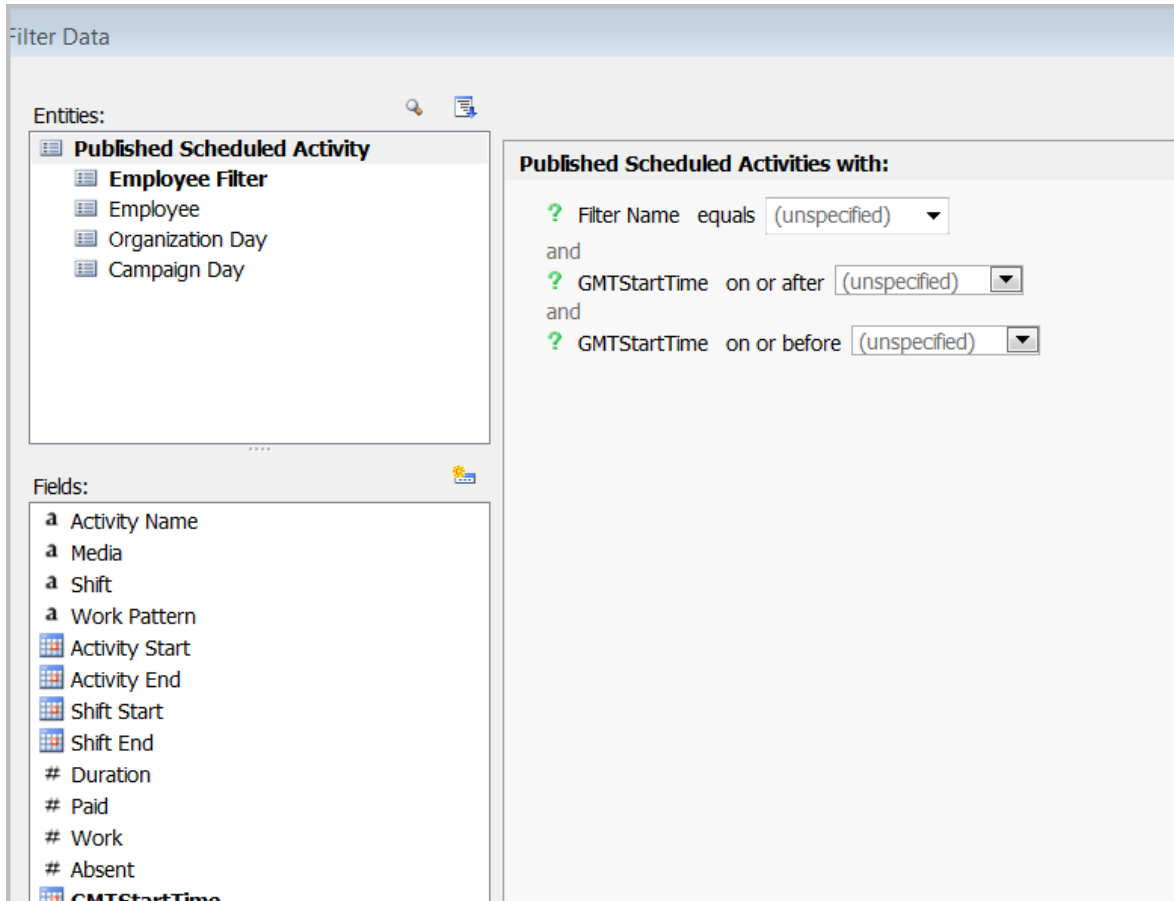
- 1 Click the  Filter button.
- 2 Click and drag fields to the right-pane.



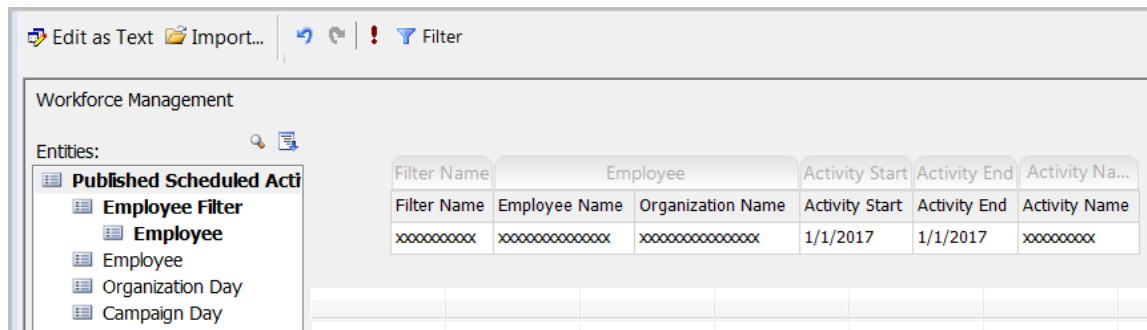
- 3 In Query Design, the data set must have a date range based on **GMTStartTime** and an **Employee Filter**.

GMTStartTime is an indexed field in the database. Records that fit the date range criteria can be retrieved very quickly using this field.

ActivityStart and **ActivityEnd** are calculated fields in the local time of the user. Before the date range criteria can be applied using these fields, the system reads every row in the table and calculates the time zone. On a large database, this could exceed the limit for the report run time and cause a time-out error.

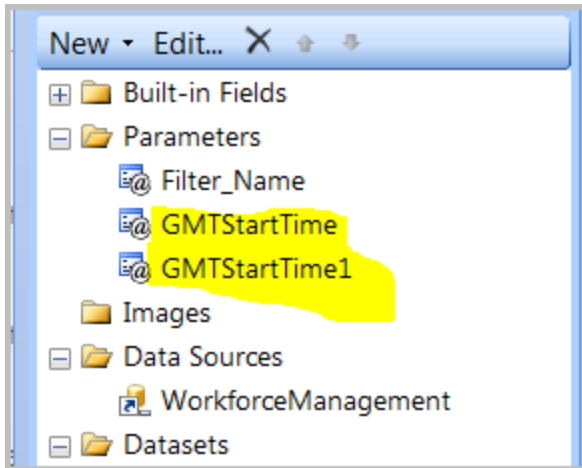


The data set does *not* have to include **GMTStartTime**.

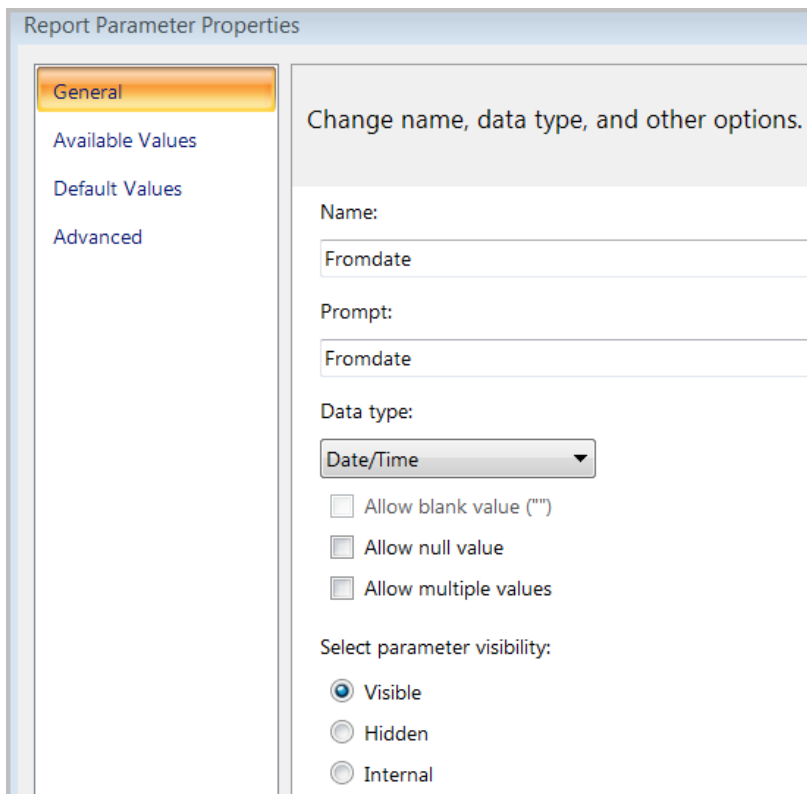


4 Click **OK**.

When Query Designer completes, under **Parameters**, the three filter attributes are displayed, including **GMTStartTime** and **GMTStartTime1**.



- 5 From **Report Parameter Properties**, add two new parameters, which provide the date range in the local time of the user:
 - **Fromdate**
 - **Todate**
- 6 Set the **Data type** for these parameters to **Date/Time**.



7 From **Dataset1** , right-click and select **Parameters**.

8 For the **GMTStartTime** parameter, select **fx** and change the expression from:
=Parameters!GMTStartTime.Value
 to:
=dateadd("d",-1,Parameters!Fromdate.Value)



You do *not* need to type **Parameters!Fromdate.Value** ; just select the value from the parameter list.

The screenshot shows a parameter field labeled 'GMTStartTime' with a dropdown menu containing '@GMTStartTime' and a function button 'fx'. Below the field, the 'Expression' pane is open, showing 'Set expression for: Value' and the expression '=Parameters!GMTStartTime.Value'.

The screenshot shows the same parameter field 'GMTStartTime' with the dropdown menu set to '@GMTStartTime'. The 'Expression' pane now shows the updated expression '=dateadd("d",-1,Parameters!Fromdate.Value)'.

The updated expression indicates that for the time in GMT, it looks one day *before* the start time.

- 9** For the **GMTStartTime1** parameter, select **fx** and change the expression from:

=Parameters!GMTStartTime1.Value

to:

=dateadd("d",1,Parameters!Todate.Value)

The screenshot shows a parameter field labeled 'GMTStartTime1' with a dropdown menu containing '@GMTStartTime1' and a function button 'fx'. The 'Expression' pane shows 'Set expression for: Value' and the initial expression '=Parameters!GMTStartTime1.Value'.

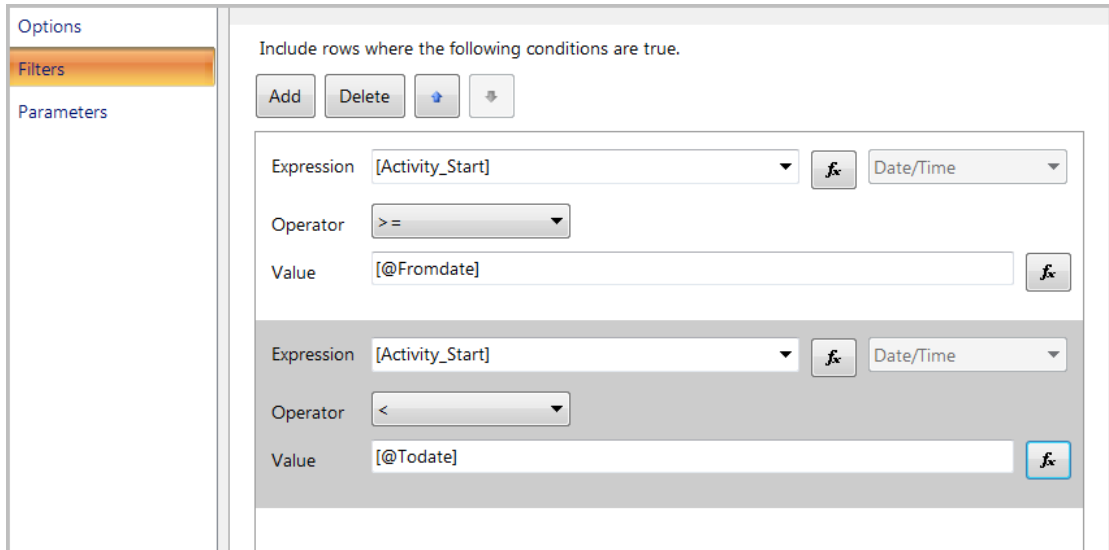
The screenshot shows the same parameter field 'GMTStartTime1' with the dropdown menu set to '@GMTStartTime1'. The 'Expression' pane now shows the updated expression '=dateadd("d",1,Parameters!Todate.Value)'.

The updated expression indicates that for the time in GMT, it looks one day *ahead* of the end time.

- 10** Right-click on **Dataset1** and select **Filters**.

11 To filter the activity in the local time of the user, add the following filter fields:

Expression	Operator	Value
[Activity_Start]	>=	[@Fromdate]
[Activity_Start]	<	[@Todate]



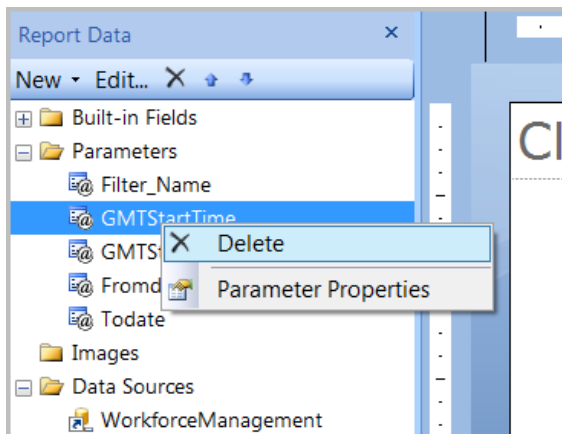
Adding one day before and one day after includes more data than needed. The data is further filtered using **Activity_Start** which is calculated in the local time of the user.

12 Click **Add** and set:

- **Activity_Start** > = **Parameters!Fromdate.Value**
- **Activity_Start** < = **Parameters!Todate.Value**

This now filters the data, based on the local time of the user.

13 From **Parameters**, right-click **GMTStartTime** and **GMTStartTime1** and click **Delete**.



Workforce Management model


This chapter describes all Query Entities and Fields that are part of the Workforce Management model.

Topics

Query entities, fields, and related entities	31
Entities	32

Query entities, fields, and related entities

Query entities have associated fields and related entities. The following table elements help define each query and field.

- **Bold Fields:** Fields displayed in **bold** are those automatically added to the query when you double-click or drag and drop the entity into the query area. The remaining fields can be added individually by dragging and dropping them into the query area.
- **User Time Zone:** Fields displayed in user time zone (Yes or No).
- **Data Types:**
 - # - Number/Identifier
 - a - Attribute
 -  - Date
- **Related Entities:** Entities that can be joined with a parent entity.

Entities


Query entities have associated fields and related entities.

All of the following Entities are available:

- [Actual Activity](#), page 32
- [Campaign Day Dimension](#), page 33
- [Employee](#), page 34
- [Employee Filter](#), page 35
- [Employee Skill](#), page 36
- [Exception](#), page 36
- [Organization Day Dimension](#), page 37
- [Performance Statistic](#), page 38
- [Published Scheduled Activity](#), page 42
- [Supervisor](#), page 43
- [Team Lead](#), page 44
- [Unpublished Scheduled Activity](#), page 44
- [User Preference](#), page 46
- [VCT Event](#), page 47

Actual Activity

The name of the activity the employee is actually doing.

Fields	Data Type	User Time Zone	Description
Activity Name	a		The name of the activity.
Start Time		Yes	The date/time that this activity began.
End Time		Yes	The date/time that this activity ended.
Duration	#		The total duration in hours of this activity.

Fields	Data Type	User Time Zone	Description
Paid	#		The paid duration in hours of this activity (Paid in this case means that the activity's definition has the attribute Is Paid, which is slightly different from the meaning of paid for scheduled activities.) At the record level, this is either Actual Time or 0, but because it's a fact, it can be used to aggregate Paid Time across different dimensions.
Time Zone Name	a		The name of the time zone.

Related Entities

- [Employee](#), page 34
- [Organization Day Dimension](#), page 37
- [Campaign Day Dimension](#), page 33
- [Employee Filter](#), page 35




It is not advised to use the Actual Activity query in conjunction with Published Scheduled Activity, Unpublished Scheduled Activity, or Exceptions because unexpected behavior might result.

Campaign Day Dimension

Used to aggregate data according to campaign day or week (taking into account the campaign's day or week boundary).

Fields	Data Type	Description
Local Day		The date/time that the campaign's work day begins. This includes the organization day boundary.



Fields	Data Type	Description
Local Week		The date/time that the campaign's work week begins. This includes the organization week boundary.
Campaign Name	a	The name of the campaign.
SP Name	a	The name of the scheduling period.

Related Entities

- [Actual Activity](#), page 32
- [Published Scheduled Activity](#), page 42
- [Unpublished Scheduled Activity](#), page 44

Employee

Information on the people who work in or for the business represented in this system.

Fields	Data Type	Description
Employee Name	a	The name of the employee.
Organization Name	a	The organization to which the employee currently belongs.
Type	a	The employee type (e.g., Full Time, Part Time).
Hire Date		The date the employee was hired.
Termination Date		The date the employee is no longer working for the company.
Badge	a	The employee badge.
Employee Number	a	The number of the employee.
Is Teamlead	a	Indicates whether the employee is a team lead. This item returns either Yes for true or No for false.

Fields	Data Type	Description
Is Supervisor	a	Indicates whether the employee is a supervisor. This item returns either Yes for true or No for false.

Related Entities

- [Actual Activity](#), page 32
- [Employee Skill](#), page 36
- [Team Lead](#), page 44
- [Supervisor](#), page 43
- [Published Scheduled Activity](#), page 42
- [Unpublished Scheduled Activity](#), page 44
- [Employee Filter](#), page 35
- [Exception](#), page 36

Employee Filter

Employee filters created by current logged-in users. An employee filter selects a list of employees based on complex search criteria.

Fields	Data Type	Description
Filter Name	a	The name of the employee filter created by current logged in user(s).
User Name	a	The name(s) of current logged in user(s).

Related topics

- [User Preference](#), page 46
- [Exception](#), page 36
- [Actual Activity](#), page 32
- [Published Scheduled Activity](#), page 42
- [Unpublished Scheduled Activity](#), page 44
- [Employee](#), page 34

Employee Skill

Describes the skills of an employee.



Fields	Data Type	Description
Skill	a	Name of the employee's skill.
Proficiency	#	The employee's proficiency for this skill.
Priority	#	The priority for this skill.

Related topics

[Employee](#), page 34

Exception

Tracks the periods when employees do not adhere to their planned activities.

Fields	Data Type	User Time Zone	Description
Approved By	a		The username of the employee who approved this exception. If the exception is not approved, this item will be blank.
Non-Adhering Activity	a		The name of activity the employee was actually doing when the employee should have been doing something else.
Start Time		Yes	The date/time that this exception began.
End Time		Yes	The date/time that this exception ended.
Is Approved	a		Indicates that this is an approved exception. Returns either Yes for true or No for false.

Fields	Data Type	User Time Zone	Description
Duration	#		The total duration in hours of this exception. This will always be the difference between Exception End and Exception Start , but as a fact, it can be used for group level aggregation.
Approved Hours	#		The approved duration in hours of this activity. At the record level, this is either Non-Adhering Time or 0, but as a fact, it can be used to aggregate Approved Time across different dimensions.
Time Zone	a		The time zone.



It is not advised to use this query in conjunction with Unpublished Scheduled Activity because unexpected behavior might result.

Related topics



[Employee Filter](#), page 35

[Employee](#), page 34

Organization Day Dimension

Used to aggregate data according to the organization work day or work week (taking into account the organization's day or week boundary).

Fields	Data Type	User Time Zone	Description
Organization	a		The name of the organization.
Day		Yes	The date/time (in the user's timezone) that the organization's work day begins. This includes the organization day boundary.

Fields	Data Type	User Time Zone	Description
Local Day			The date/time (in the organization's timezone) that the organization's work day begins. This includes the organization day boundary.
Local Week			The date/time (in the organization's timezone) that the organization's work week begins. This includes the organization week boundary.

Related topics


[Actual Activity](#), page 32






[Unpublished Scheduled Activity](#), page 44

[Published Scheduled Activity](#), page 42

Performance Statistic

Includes historical (actual) data representing measures of performance, as well as forecast and predicted data that is generated from scheduling work resources.

Fields	Data Type	User Time Zone	Description
DateTime		Yes	Date/time of the beginning of the interval to which all these facts refer.
Media	a		Name of media to which these statistics belongs.
Campaign	a		Name of campaign to which these statistics belongs.
Campaign ID	#		When viewing a combined queue, this # is the internal ID of the campaign being reported on. A value of -1 indicates that this data is for an individual (non-combined) queue. In most cases, it is preferable to use the Campaign query item instead.

Fields	Data Type	User Time Zone	Description
Queue	a		Name of the queue to which these statistics belong.
Queue ID	#		The internal ID of the queue being reported on. A value of -1 indicates that this data is for a combined queue (ex: "Combined – Email", "Combined – All Media", etc). In most cases, it is preferable to use the Queue query item instead.
Media ID	#		The internal ID of the Media type for the queue being reported on. A value of -10 indicates that this data is for either the "Combined - All Media" queue, or an individual (non-combined) queue. In most cases, it is preferable to use the Media query item instead.
Year		Yes	Date/time of the beginning of the year. This item is useful when doing yearly aggregations.
Month		Yes	Date/time of the beginning of the month. This item is useful when doing monthly aggregations.
Date		Yes	Date portion of beginning of the interval.
Time		Yes	Time portion of beginning of the interval
Hour		Yes	Date/time of the beginning of the hour for this interval. This item is useful when doing hourly aggregations.
Actual AHT	#		Actual average handling time. This value is normalized by call volume so that aggregation works correctly.
Actual ASA	#		Actual average speed to answer. This value is normalized by call volume so that aggregation works correctly.

Fields	Data Type	User Time Zone	Description
Actual PCA	#		Actual percentage of calls answered within the service time. This value is normalized by call volume so that aggregation works correctly.
Actual CV	#		Actual call volume. The data for this field is sourced from the table TRACEREPORT in the Ad Hoc Model. The TRACEREPORT table is updated by Report Dump and is sourced from the QUEUEHISTORYTIMESERIES column, CallVolume . This is the actual data from the switch for each queue.
Actual Staffing	#		Actual staffing.
Actual FTE	#		Actual full time employee equivalents.
Actual VH	#		Actual volume handled. The data for this field is sourced from the table TRACEREPORT in the Ad Hoc Model. The TRACEREPORT table is updated by Report Dump and is sourced from the QUEUEHISTORYTIMESERIES column, VH . This is the actual data from the switch for each queue.
Actual Abandonment	#		Actual abandonment.
Actual Occupancy	#		Actual occupancy.
Actual Backlog	#		The actual backlog value for the corresponding Queue and #. The aggregation formula for this statistic is a simple average (take the total, and divide by the # of 15-minute intervals).
Forecasted AHT	#		Forecasted average handling time. This value is normalized by call volume so that aggregation works correctly.





Fields	Data Type	User Time Zone	Description
Forecasted ASA	#		Forecasted average speed to answer. This value is normalized by call volume so that aggregation works correctly.
Forecasted Backlog	#		The forecasted backlog value for the corresponding queue and #. The aggregation formula for this statistic is a simple average (take the total, and divide by the # of 15-minute intervals).
Forecasted PCA	#		Forecasted percent calls answered within service time. This value is normalized by call volume so that aggregation works correctly.
Forecasted CV	#		Forecasted call volume.
Forecasted FTE	#		Forecasted full time employee equivalents.
Forecasted Abandonment	#		Forecasted abandonment.
Forecasted Occupancy	#		Forecasted occupancy.
Required ASA	#		Required average speed to answer. This value is normalized by call volume so that aggregation works correctly.
Required PCA	#		Required percentage of calls answered within the service time. This value is normalized by call volume so that aggregation works correctly.
Required FTE	#		Required full time employee equivalents.
Required Abandonment	#		Required abandonment.

Related topics

[User Preference](#), page 46

Published Scheduled Activity

Represents the employees' published planned activities such as shifts, shift events (breaks), and calendar events. Calendar events include meetings, vacations, etc.

Fields	Data Type	User Time Zone	Description
Shift	a		The name of the shift definition from which this scheduled activity derives. If the activity is part of a calendar event, this item will be blank.
Activity Name	a		The activity the employee is scheduled to work.
Media	a		The media of the activity that the employee is scheduled to work.
Work Pattern	a		The name of work pattern definition where this scheduled activity derives. If the activity is part of a calendar event, this item will be blank.
Activity Start		Yes	The date/time that this scheduled activity begins.
Activity End		Yes	The date/time that this scheduled activity ends.
Shift Start		Yes	The start of the shift.
Shift End		Yes	The end of the shift.
Duration	#		The total duration in hours of this scheduled activity. This duration will always be the difference between Activity End and Activity Start , but, as a fact, it can be used for group level aggregation.

Fields	Data Type	User Time Zone	Description
Paid	#		The paid duration in hours of this scheduled activity. At the record level, this is either Scheduled Time or 0, and it can be used to aggregate Paid Time across different dimensions.
Work	#		The work duration in hours of this scheduled activity. Some activities are considered work and some are not. For details, see Scheduled Paid Time above.
Absent	#		The absent time in hours for this scheduled activity.
Time Zone	a		The time zone.

Related topics

[Employee](#), page 34

[Organization Day Dimension](#), page 37



[Campaign Day Dimension](#), page 33

[Employee Filter](#), page 35

Supervisor

Employees who supervise other employees.

Fields	Data Type	Description
Organization Name	a	The organization to which the supervisor currently belongs.
Supervisor Name	a	The full name of the supervisor.
Supervisor Number	a	The supervisor's number.
Badge	a	The badge of the supervisor.

Fields	Data Type	Description
Hire Date		Date the supervisor was hired.
Termination Date		The date the supervisor is no longer working for company.

Related topics

[Employee](#), page 34

Team Lead

Employees who are team leaders of other employees.





Fields	Data Type	Description
Organization Name	a	The organization to which the team lead currently belongs.
Team Lead Name	a	The full name of the team lead.
Team Lead Number	#	The team lead's number.
Badge	a	The badge of the team lead.

Related topics

[Employee](#), page 34

Unpublished Scheduled Activity

Represents the employees' unpublished planned activities, such as shifts, shift events (breaks), and calendar events. Calendar events include meetings, vacations, etc.

Fields	Data Type	User Time Zone	Description
Shift	a		The name of the shift definition from which this scheduled activity derives. If the activity is part of a calendar event, this item will be blank.
Activity Name	a		The activity the employee is scheduled to work.
Media	a		The media of the activity that the employee is scheduled to work.
Work Pattern	a		The name of work pattern definition where this scheduled activity derives. If the activity is part of a calendar event, this item will be blank.
Activity Start		Yes	The date/time that this scheduled activity begins.
Activity End		Yes	The date/time that this scheduled activity ends.
Shift Start		Yes	The start of the shift.
Shift End		Yes	The end of the shift.
Duration	#		The total duration of this scheduled activity. This duration will always be the difference between Activity End and Activity Start , but, as a fact, it can be used for group level aggregation.
Paid	#		The paid duration of this scheduled activity. At the record level, this is either Scheduled Time or 0, but as a fact, it can be used to aggregate Paid Time across different dimensions.

Fields	Data Type	User Time Zone	Description
Work	#		The work duration of this scheduled activity. Some activities are considered work and some are not. For details, see Scheduled Paid Time above.
Absent	#		The absent time in hours for this scheduled activity.
Time Zone	a		The time zone.

Related topics

[Employee](#), page 34

[Campaign Day Dimension](#), page 33

[Organization Day Dimension](#), page 37

[Employee Filter](#), page 35

User Preference

The user preference.

Fields	Data Type	Description
Time Zone	a	The time zone.
User Name	a	The user name.
Language	a	The language.

Related topics

[Performance Statistic](#), page 38



[Employee Filter](#), page 35

[VCT Event](#), page 47

VCT Event

Shows the different stages of work performed on each Volume Capture Tool (VCT) queue, which are queues having a **Operations** or **Project** media type, at a certain date and time. The VCT Event information allows you to find out the amount of work “checked-out” from each VCT queue or “checked-in” when completed. You can track the work that arrived or view the status of each VCT queues’ inventory on an intra-day and/or intra-week basis.

Fields	Data Type	User Time Zone	Description
Batch	#		The batch # represents a group ID that identifies the chains created for VCT Events.
Inventory	#		The net total of outstanding work for each VCT queue.
Organization	a		The organization to which the VCT queue is assigned.
Time Standard	#		The activity handle time (in seconds) for the VCT queue, set in the Work Queue Configuration tab.
Event Type	a		The type of VCT Event. Possible values are: Arrivals Check-Out Check-In Inventory Adjustment Inventory Balance WIP Balance
Value	#		Shows the value of the VCT Events (arrivals, check-out, or check-in).
Work in Progress	#		The current net total work that has been checked out by an employee for the corresponding VCT queue.

Fields	Data Type	User Time Zone	Description
Queue	a		The name of the VCT queue to which this VCT event applies.
Queue Description	a		The queue's description.
Queue Media	a		The media type for the queue specified in the Queue column.
Last Edit Date		Yes	The date/time when this VCT Event was edited.
Creation Date		Yes	The date/time when this VCT Event was created.
Time Zone	a		The time zone.



The VCT Event query is not intended to be joined with the Performance Statistics query. Performance statistics are only displayed at 15-minute intervals, whereas VCT events can occur at any time.

Related topics

[User Preference](#), page 46

Scorecards Model

This chapter lists and describes all entities and fields that are part of the three Scorecards Reporting packages.

The packages are:

- Employee Source Measures
- Organization Source Measures
- Performance Management KPIs

In each report, the particular grouping of fields can be used to filter the information that is contained in a report.

Topics

Scorecards reporting package and entities	50
Scorecards Report Entities	52

Scorecards reporting package and entities

A Scorecard reporting package is a grouping of entities that can be used to filter the information that is contained on a report.

These entities are found at the root level and pertinent fields are contained in sub-folders.

Below, the three package listings display the entities included in each one. After is an alphabetical listing showing the name, type and data type.

Employee Source Measures package

These are the entities for the Employee Source Measures package.

- KpiSourceMeasure
- DimTime
- DimEmployee
- EmployeeFilter
- DimOrganization
- OrganizationBridge
- DimEdm
- DimSupervisor
- DimBaseMeasure
- FactBaseMeasure_Employees

Organization Source Measures package

These are the entities for the Organization Source Measures package.

- KpiSourceMeasure
- DimTime
- DimOrganization
- OrganizationBridge
- DimEdm
- DimBaseMeasure
- FactBaseMeasure_Organizations

Performance Management KPIs package

These are the entities for the Performance Management KPIs package.

- DimTime
- DimEmployee
- EmployeeFilter

- DimOrganization
- OrganizationBridge
- DimEdm
- DimSupervisor
- DimKpi
- FactKpi

Scorecards Report Entities

Base Measure

This is the source measure dimension table.

Field Name	Data Type	Description
Dim Base Measure ID	Integer	Primary key.
BP Main Base Measure ID	Integer	Identify a source measure in BPMAINDB.
Base Measure Name	String	Name of the Scorecards source measure.
Code	String	Alphanumeric code Identifying the source measure.
Base Measure Desc	String	Description of the Scorecards source measure.
Dim Source System ID	Integer	Identifying the source system.
Dim Source System Name	String	Source System Name.
Is Active	String	True/false to indicate if the EDM is active.
Edt ID		Identification of the EDT.
Intraday Compatibility	String	True/false to indicate if the source measure can be used for Intraday calculations.
Periodicity Aggr Type ID	Integer	Identifying the Periodicity Aggregation Type.
Periodicity Aggregation Type	String	Periodicity Aggregation Type
Org Aggr Type ID	Integer	Identifying the Organization Aggregation Type.
Org Aggregation Type Name	String	Organization Aggregation Type.

Field Name	Data Type	Description
Edt Aggr Type ID		Identifying the EDT aggregation type.
Edt Aggr Type Name	String	The EDT aggregation type.

Scorecards Report Entities

Base Measure

This is the source measure dimension table.

Field Name	Data Type	Description
Dim Base Measure ID	Integer	Primary key.
BP Main Base Measure ID	Integer	Identify a source measure in BPMAINDB.
Base Measure Name	String	Name of the Scorecards source measure.
Code	String	Alphanumeric code Identifying the source measure.
Base Measure Desc	String	Description of the Scorecards source measure.
Dim Source System ID	Integer	Identifying the source system.
Dim Source System Name	String	Source System Name.
Is Active	String	True/false to indicate if the EDM is active.
Edt ID		Identification of the EDT.
Intraday Compatibility	String	True/false to indicate if the source measure can be used for Intraday calculations.
Periodicity Aggr Type ID	Integer	Identifying the Periodicity Aggregation Type.

Field Name	Data Type	Description
Periodicity Aggregation Type	String	Periodicity Aggregation Type
Org Aggr Type ID	Integer	Identifying the Organization Aggregation Type.
Org Aggregation Type Name	String	Organization Aggregation Type.
Edt Aggr Type ID		Identifying the EDT aggregation type.
Edt Aggr Type Name	String	The EDT aggregation type.

Extensible Dimension (EDM)

An extensible dimension (EDM) is a configurable dimension that extends the source measure. This entry may be empty for fact rows that are without an EDM.

Field Name	Data Type	Description
Dim Edm ID	Integer	Primary key.
Bpmaindb Edm ID	Integer	Identifier of BMAINDB EDM.
Edm Name	Integer	EDM name.
Edm Description	String	EDM description.
Edt ID	String	Identification of the EDT.
Edt Name	String	EDT name.
Is Default	String	True/false to indicate if the EDM is the default EDM.
Is Active	String	True/false to indicate if the EDM is active.
Creation Date	Integer	Creation date.

Employee

This is the Employee dimension data.

Field Name	Data Type	Description
Dim Employee ID	Integer	Primary key.
BP Main Employee ID	Integer	Identifier of employee in BPMAINDB.
BP Main Person ID	Integer	Identifier of the person in BPMAINDB.
First Name	String	First name of the employee.
Last Name	String	Last name of the employee.
First Last Name	String	First name, last name string.
Last First Name	String	Last name, first name string.
Middle Initial	String	Middle initial of the employee
Primary Email Contact	Integer	Email address.
Is Active	Decimal	True/false to indicate if the EDM is active.
Start Period ID	Integer	Identifier from DIMTIME.
Start Period Date	Integer	Date of Start Period ID.
End Period ID	Integer	Identifier from DIMTIME.
End Period Date	String	Date of End Period ID.

KPI

Key Performance Indicators (KPI) are defined in Scorecards..

Entity Name	Data Type	Description
Dim Kpi ID	Integer	Primary key.

Entity Name	Data Type	Description
Kpi Name	String	Name of KPI.
Cx Formula	String	The KPI formula constructed with BM IDs and KP IDs, readable by the Scoring Engine.
Kpi Desc	String	KPI description.
Rules Syntax	String	KPI formula in human readable format.
Dim Organization ID	Integer	The organization to which the KPI belongs. A KPI can be defined in a higher-level organization and set to apply to sub-organizations. The owner organization is the organization in which the KPI was created.
Dim Organization Name	String	Name of the organization.
Edt ID	Integer	Identification of the EDT.
Start Period ID	Integer	Identifier of the start of an effectivity time. Effectivity implies that there are other records for different non-overlapping time periods.
Start Period Date		Date of Start Period ID.
End Period ID	Integer	Identifier of the end of an effectivity time. Effectivity implies that there are other records for different non-overlapping times.
Kpi Type Name	String	This field will display either KPIs calculated for employees or KPIs calculated for organizations.
Is Active	Integer	True/false to indicate if the KPI is active.
Is Goal Reduced	Integer	Whether goal reduction is to be applied. True/1, if it is, False/0, otherwise.

Entity Name	Data Type	Description
Is Goal Rollup	Integer	Whether the KPI is marked to roll up. True/1 if it is, False/0, otherwise.
Is In Period Date		
Is Rollup	Integer	Whether the KPI is a roll-up type. If it is, True/1. Otherwise, False/0.
Is Trickle Down	Integer	Whether this KPI trickles down to sub-organizations. True/1, if it does. False/0, otherwise.
Formula Aggregation Name	String	Whether the aggregation of the KPI formula should be by average or sum.
Kpi Type ID	Integer	Identifier of KPI Type.
Variance	Integer	
Upper Variance	Decimal	The upper limit of Goal.
Lower Variance	Decimal	The lower limit of Goal.
Variance Direction	String	The direction of the variance for a KPI: up, dn (down). This is used by the Scoring Engine for evaluating scores.
Peer Benchmark Type Name	String	Name of the Scorecards Peer Benchmark Type, such as: Percentile, Mean, Mode, etc.
Peer Benchmark Type ID	Integer	Identifier of Peer benchmark type. Each benchmark type associates a business rule that can be used for calculating peer data for KPIs.
Peer Benchmark Group ID	Integer	Identifier of Peer Benchmark Group. Peer Groups define how data should be grouped for calculating Peer Benchmark values.
Peer Benchmark Group Name	String	Name of the Scorecards Peer Group.

Entity Name	Data Type	Description
Display Format	String	Code for the format to be used to display KPI data on scorecards: Time, Value, Currency, etc.
Display Format Type	String	Type of format to be used for the display.
Edt Calc Type ID	Integer	
Formula Aggregation ID		
End Period Date	String	Date of End Period ID.
Number Separator	String	Number separator to be used for the display.
Variance Type	String	Percent/value. Whether the variance around the goal is a percentage of the goal or an absolute value.
Bpmain Kpi ID	Integer	Identifier of KPI in BPMAINDB.

Organization

This is the Organization dimension data.

Field Name	Data Type	Description
Dim Organization ID	Integer	Primary key.
Organization Description	String	Organization description
Time Zone	String	Time zone of organization.
Total Day Boundary Offset	Integer	Offset in minutes from midnight, local time, when the day for the organization starts, and the previous day ends. DAYBOUNDARYOFFSET BETWEEN -1 AND 1440
Is Operation Monday	Integer	Monday is a work day.

Field Name	Data Type	Description
Is Operation Tuesday	Integer	Tuesday is a work day.
Is Operation Wednesday	Integer	Wednesday is a work day.
Is Operation Thursday	Integer	Thursday is a work day.
Is Operation Friday	Integer	Friday is a work day.
Is Operation Saturday	Integer	Saturday is a work day.
Is Operation Sunday	Integer	Sunday is a work day.
Parent Dim Org ID	Integer	Identifier of parent organization.
Is Active	String	True/false to indicate if the EDM is active.
Start Period ID	Integer	Identifier from DIMTIME of the start of an effectivity time. Effectivity implies that there are other records for different non-overlapping time periods.
Start Period Date		Date of Start Period ID.
End Period ID	Integer	Identifier from DIMTIME of the end of an effectivity time. Effectivity implies that there are other records for different non-overlapping times.
End Period Date	String	Date of End Period ID.
BP Main Organization ID	Integer	Identifier of organization in BPMAINDB.
Organization Name	Integer	Name of the organization.
Week Start Day	Integer	Number representing day of the week. Sunday = 1, Monday = 2, ..., Saturday = 7, corresponding to the Java Calendar Class. This mapping is also in table WEEKDAY . WEEKSTARTDAY BETWEEN 1 AND 7.

Supervisor

This is the Supervisor dimension data.

Field Name	Data Type	Description
Dim Supervisor ID	Integer	Primary key.
Supervisor ID	Integer	Identity of the Supervisor.
Supervisor Dim Employee ID	String	Identifier of the Supervisor in DIMEMPLOYEE.
Dim Employee ID		Identity of supervised employee in DIMEMPLOYEE.
Start Period ID	String	Identifier from DIMTIME of the start of an effectivity time. Effectivity implies that there are other records for different non-overlapping time periods.
Start Period Date		Identifier in DIMTIME when employee started supervision.
End Period ID	Integer	Identifier from DIMTIME of the end of an effectivity time. Effectivity implies that there are other records for different non-overlapping times.
End Period Date	String	Date of End Period ID.
Supervisor First Name	String	Supervisor's first name.
Supervisor Last Name	String	Supervisor's last name.
Employee First Name	String	Supervised employee's first name.
Employee Last Name	String	Supervised employee's last name.

Time

This is the Time dimension data, with a daily granularity level.

Field Name	Data Type	Description
Dim Time Id	Integer	Primary key.
Period Date	Date Time	The period date.
Period Day	Integer	The period day.
Day of Year	Integer	The day of year.
Week of Year	Integer	The week of year.
Month of Year	Integer	The month of year.
Quarter of Year	Integer	The quarter of year.
Year Val	Integer	The year value.
First Day of Week	Date Time	The first day of week.
Last Day of Week	Date Time	The last day of week.
First Day of Month	Date Time	The first day of month.
Last Day of Month	Date Time	The last day of month.
First Day of Quarter	Date Time	The first day of quarter.
Last Day of Quarter	Date Time	The last day of quarter.
First Day of Year	Date Time	The first day of year.
Last day of Year	Date Time	The last day of year.

Employee Filter

This is the Employee Filter of the logged-in user.

Field Name	Data Type	Description
EFWID	Integer	Primary Key.
BP User ID	Integer	Identity of user.
Win User Name	Integer	Windows name of logged-in user.
Employee Filter ID	Integer	Identifier of employee filter.
Employee Filter Name	Integer	Employee filter name.
BP Main Employee ID	Integer	Identifier of employee that is in filter.
User ID Filter	Integer	User ID of logged-in user.

Employee Base Measure

The **FACTBASEMEASURE** table stores the source measure data for each employee in the system. The data is stored as it was received from the external data sources that feed Scorecards.

Each row in the **FACTBASEMEASURE** table has an **Actual Value** field, which is the basic measurement that Scorecards uses to calculate KPIs. All other columns are dimension fields.

Field Name	Data Type	Description
Fact ID	Integer	Primary key.
Dim Base Measure Code	Integer	ID of base measure.
Dim Periodicity ID	Integer	ID of periodicity.
Dim Periodicity Desc	String	Name of periodicity.
Dim Organization Name	Integer	Name of employee's organization.
Dim Employee Name	Integer	Name of employee.

Field Name	Data Type	Description
Dim Time Date	Integer	Date and time.
Dim Sourcesystem ID	Integer	ID of source system.
Dim Source System Name	String	Name of source system.
Actual Value		Scorecards uses this to calculate KPIs.
Jobtitle ID		Identifier of the job title of the employee.
Job Title Name	String	Job title of the employee.
Dim Edm Name	String	EDM name.

Organization Base Measure

The **FACTBASEMEASURE** table stores the source measure data for each organization in the system. The data is stored as it was received from the external data sources that feed Scorecards.

Each row in the **FACTBASEMEASURE** table has an **Actual Value** field, which is the basic measurement that Scorecards uses to calculate KPIs. All other columns are dimension fields.

Field Name	Data Type	Description
Fact ID	Integer	Primary key.
KPI Source Measure		
Dim Base Measure		
Dim Base Measure Code	Integer	ID of base measure.
Dim Periodicity ID	Integer	ID of periodicity.
Dim Periodicity Desc	String	Name of periodicity.
Dim Organization		
Organization Bridge		

Field Name	Data Type	Description
Dim Organization Name	Integer	Name of organization.
Dim Time		
Dim Time Date	Integer	Date and time.
Dim Sourcesystem ID	Integer	ID of source system.
Dim Source System Name	String	Name of source system.
Dim Edm		
Actual Value		Scorecards uses this to calculate KPIs.
Dim Edm Name	String	EDM name.

Fact KPI

A process called the calculation engine populates the **FACTKPI**. This process is run by the Integration Server. It calculates KPIs for all employees and organizations in the company. The formulas to calculate the KPIs are taken from the **DIMKPI** table. The source measure data that is referenced in the KPI formulas are taken from **FACTKPI**.

The result of the calculation engine is stored in the **FACTKPI** table. This table is then used by the employee scorecard to view the KPI results, scores, goals, peer and %Met calculations, etc. **FACTKPI** is populated with surrogate keys from dimension tables such as **DIMKPI**, **DIMEMPLOYEE**, **DIMORGANIZATION**, and **DIMGOAL**, and has additional fact data that is calculated by the calculation engine including **ACTUALVALUE**, **ACTUALGOALVALUE**, **DIMSCOREID**, **PEERVALUE**, and **PERCENTMETVALUE**. This table also has an **ISDIRTY** field. The calculation engine uses this field to identify which rows need to be calculated.

Field Name	Data Type	Description
Fact Kpi ID	Integer	Primary key.
Dim Periodicity ID	Integer	ID of periodicity.
Dim Score ID	Integer	ID of score.
Dim Score Name	String	

Field Name	Data Type	Description
Dim Goal ID	Integer	ID of goal.
Actual Value	Float	Processed by the calculation engine. It is the result of the KPI formula run on the source measures.
Actual Goal Value	Float	A goal is defined for a KPI. The KPI formula gives an actual value. The actual value is compared to a goal to give a score. Goals can be defined for each organization and each job title.
Peer Value	Float	The value displayed represents the benchmark score based on the benchmark group (Peer Group) and the calculation method in use (Peer Type). The type of calculation to be performed include: Percentile; Rank; Median; Mode; Mean; None. (None allows you to disable peer benchmarking for the selected KPI if it was previously enabled. No peer benchmarking data is then displayed in that column for this KPI.)
Percent Met	Float	The %Met value is calculated for all employees for the selected organization and its sub-organizations.
Org Percent Met	Float	The %Met value is calculated for organizations.
Dim Rollup Type ID	Integer	Identifier of the rollup type.
Dim Roll Up Type	String	Three options: NONE, PERSONTOORGANIZATION, PERSONTOSUPERVISOR. Specifies if the FACT row is an aggregation or a person KPI. There are two supported aggregations: to organization and to supervisor.

Field Name	Data Type	Description
Peer Group Size	Integer	Peer group size of the peer calculation.
Dim Organization Name	String	Name of organization.
Dim Employee Name	String	Name of employee.
Dim Edm Name	String	Name of EDM.
Dim Periodicity Desc	String	Name of periodicity.
Dim Time Date	Date	Date of FACT KPI row.
Job Title ID	Integer	Identifier of job title.
Job Title Name	String	Job title of the employee.

Source Measure

Dimension of the KPI with source measures in the KPI formula.

Field Name	Data Type	Description
KSMID	Integer	Primary key.
Bpmaindb Source Measure ID		
Bp Main Kpi ID	Integer	Identifier of KPI in BPMAINDB.
Kpi Name	String	Name of KPI.
Cx Formula	String	The KPI formula constructed with BM IDs and KP IDs, readable by the Scoring Engine.
KPI Desc	String	KPI Description.
Rules Syntax	String	KPI formula in human readable format.

Field Name	Data Type	Description
Dim Organization ID	Integer	The organization to which the KPI belongs. A KPI can be defined in a higher-level organization and set to apply to sub-organizations. The owner organization is the organization in which the KPI was created.
Edt ID	Integer	Identification of the EDT.
Start Period ID	Integer	Identifier of the start of an effectivity time. Effectivity implies that there are other records for different non-overlapping time periods.
Start Period Date		Date of Start Period ID.
End Period ID	Integer	Identifier of the end of an effectivity time. Effectivity implies that there are other records for different non-overlapping times.
KPI Type Name	String	Which of the two KPI types: KPIs calculated for employees or KPIs calculated for organizations.
Is Active	Integer	True/false to indicate if the KPI is active.
Is Goal Reduced	Integer	Whether goal reduction is to be applied. True/1, if it is, False/0, otherwise.
Is Goal Rollup	Integer	Whether the KPI is marked to roll up. True/1 if it is, False/0, otherwise.
Is In Period Date		
Is Rollup	Integer	Whether the KPI is a roll-up type. If it is, True/1. Otherwise, False/0.
Is Trickle Down	Integer	Whether this KPI trickles down to sub-organizations. True/1, if it does. False/0, otherwise.

Field Name	Data Type	Description
Formula Aggregation Name	String	Whether the aggregation of the KPI formula should be by average or sum.
Kpi Type ID	Integer	Identifier of KPI Type.
Variance		
Upper Variance	Decimal	The upper limit of Goal.
Lower Variance	Decimal	The lower limit of Goal.
Variance Direction	String	The direction of the variance for a KPI: up, dn (down). This is used by the Scoring Engine for evaluating scores.
Peer Benchmark Type Name	String	Name of the Scorecards Peer Benchmark Type, such as: Percentile, Mean, Mode, etc.
Peer Benchmark Type ID	Integer	Identifier of Peer benchmark type. Each benchmark type associates a business rule that can be used for calculating peer data for KPIs.
Peer Benchmark Group ID	Integer	Identifier of Peer Benchmark Group. Peer Groups define how data should be grouped for calculating Peer Benchmark values.
Peer Benchmark Group Name	String	Name of the Scorecards Peer Group.
Display Format	String	Code for the format to be used to display KPI data on scorecards: Time, Value, Currency, etc.
Display Format Type	String	Type of format to be used for the display.
Edt Calc Type ID	Integer	
Formula Aggregation ID		
Dim Organization Name	String	Name of the organization.

Field Name	Data Type	Description
Dim Base Measure ID		
Edt Name		
Variance Type	String	Percent/value. Whether the variance around the goal is a percentage of the goal or an absolute value.
Number Separator	String	Number separator to be used for the display.
End Period Date	String	Date of End Period ID.

Organization Bridge

ORGANIZATIONBRIDGE is a flat table associating an organization to its suborganizations. Each organization has an entry with all suborganizations.

Entity Name	Data Type	Description
Dim Organization ID	Integer	Identifier in DIMORGANIZATION of parent organization.
Parent Org Name	String	Parent organization name.
Parent Org Desc	Integer	Parent organization description.
Child Organization ID	Integer	Identifier of suborganization.
Child Org Name	String	Name of child organization.
Child Org Desc	String	Description of child organization.

Assessments model

The Assessments model is used to create reports that focus on assessments scores, activity, and productivity. The Assessment model contains two entities, and each entity has a set of folders used to create Ad Hoc reports.

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Assessments Form Scores

Assessments Form Scores entity has set of assessment folders used to create Ad Hoc reports.

Related topics

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[Form folder](#), page 73

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[ASSESS: Assessors Visibility folder](#), page 82

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Assessments Form Scores entity

The Assessments Form Scores entity contains general assessments score related properties.

Entity Name	Type	Description
Assessment Maximum Possible Score	Number	Maximum possible score for the assessment form.
Assessment Sum of Possible Scores	Number	The sum of maximum possible scores for the assessment form.

Entity Name	Type	Description
Assessment Sum of Attained Scores	Number	The sum of attained scores for the assessment form.
Assessment Local Datetime	datetime	The local date/time stamp of the assessment. The date and time the assessment was submitted, according to system local time
Status2 Title	string	The second status field, represented as a textual value. The status field in an evaluation form is a custom field used for data collection.
Status1 Title	string	The first status field, represented as a textual value. The status field in an evaluation form is a custom field used for data collection.
Pass Fail	number	Indicates whether the evaluation score passed or failed. 0 = fail, 1 = pass.
Rating	string	The caption of the rating. For example, excellent, good, fair, and so on.
Notes	string	Comments field in the assessment form header.
Assessment System Datetime	datetime	The system date/time stamp of the assessment.
Comments	string	The comments entered in the Comments field in the form footer.
Status1	number	The value of the first status field. A status field in an assessment form allows for the addition of information to aid data collection.
Status2	number	The value of the second status field. A status field in an assessment form allows for the addition of information to aid data collection.
Assessment Score	Number	The total score achieved in the assessment accurate to two decimal points (for example, 100.25).

Entity Name	Type	Description
Assessment Form Average Score	aggregate	The average score of assessments
Assessment Forms Count	aggregate	The number of assessments.

Form folder

The Form folder contains assessment form properties.

Parameter Name	Type	Description
Form	string	The name of the assessment form.
Form Revision ID	number	Identifies the revision of the assessment form.
Form Type ID	number	Identifies the assessment form type. 1 = evaluation 2 = assessment 3 = template

Assessor folder

The Assessor subfolder contains general assessor properties.

Parameter Name	Type	Description
Assessor Name	string	The assessor's name.
Assessor PBX ID	string	The assessor's PBX ID.
Assessor Email	string	The assessor's email address.
Assessor NT Login	string	The assessor's NT login.

Time Assessment Local Time folder

The Time Assessment Local Time folder contains local date and time of the assessment.

Parameter Name	Type	Description
The Year	number	The year of the assessment.
The Quarter	number	The quarter of the assessment.
The Month	number	The month of the assessment.
The Day of the Month	number	The day of the month of the assessment.
The Hour	number	The hour of the assessment.
The Datetime (indexed)	datetime	The full date and time of the assessment. For example, 1-04-2006-09:00:00.

Special Assessment Local Time folder

The Special Assessment Local Time folder contains additional date and time information for an assessment. This is a folder of the Time Assessment Local Time folder.

Parameter Name	Type	Description
The Week of the Year	number	The week of the year of the assessment.
The Day of Year	number	The day of the year of the assessment.
The Week of Month	number	The week of the month of the assessment.
The Day of Week	number	The day of the week of the assessment. For example, Sun, Mon, and so on.
Is Weekend	number	Indicates whether the date/time of the assessment is a weekend. 1=true, 0=false The definition of weekend is derived from the system configuration.

Assessments Custom Data folder

The Assessments Custom Data folder contains assessment custom data (CD) fields in the assessment form.

Parameter Name	Type	Description
Assessment CD 1 - Assessment CD 20	string	Values in the first-twentieth form custom data fields.

Contact folders

The Contacts folder contains contact details.

Parameter Name	Type	Description
System Start Time	datetime	The system date and time the contact started. The time is stored in hours and minutes.
System End Time	datetime	The system date and time the contact ended. The time is stored in hours and minutes.
Local Start Time	datetime	The system local date and time the contact started. The time is stored in hours and minutes.
Local End Time	datetime	The Impact local date and time the contact ended. The time is stored in hours and minutes.
DNIS	string	The DNIS is the dialed number identification service (DNIS) associated to the first recorded interaction of a contact. DNIS identifies the number that was dialed, useful in enterprises to which contacts to multiple numbers may be directed.
ANI	string	The ANI is the Automatic number identification (ANI) or Caller ID associated to the first recorded interaction of a contact. ANI is derived from CTI and is specific to the switch and contact scenario.
Call ID	string	Identifies the contact.
Call ID String	string	Identifies the contact.

Parameter Name	Type	Description
Customer ID	number	Identifies the customer for the entire contact.
Duration in Seconds	number	The duration in seconds of the entire contact.
Exception Reason	number	The reason for the marked exception.
Is Exception	number	An entire contact that is marked as an exception.
Num of Transfers	number	The number of transfers during the entire contact. Note: In the case of disconnection scenarios, a value of -1 is inserted for this parameter.
Num of Conferences	number	The number of conferences during the entire contact. Note: In the case of disconnection scenarios, a value of -1 is inserted for this parameter.
Num of Holds	number	The number of holds during the entire contact.
Total Hold Time	number	The total time of holds during the entire contact.

Contact Custom Data folder

The Contact Custom Data folder contains contact custom data (CD) fields.

Parameter Name	Type	Description
Contact CD 1 - Contact CD 75	string	Values in the first-seventy fifth custom data fields.

Contact Conditional Custom Data folder

The Contact Conditional Custom Data folder contains contact conditional Custom data (CCD) fields.

Parameter Name	Type	Description
Contact CCD 1 - Contact CCD 15	string	Values in the first - fifteenth form custom data fields.

Time Contact Local Time folder

The Contact Local Time folder contains local date and time of the contact.

Parameter Name	Type	Description
Contact The Year	number	The year of the entire contact.
Contact The Quarter	number	The quarter of the entire contact.
Contact The Month	number	The month of the contact.
Contact The Day of the Month	number	The day of the month of the entire contact.
Contact The Hour	number	The hour of the entire contact.
Contact The Datetime (indexed)	datetime	The full date and time of the entire contact. For example, 1-04-2006-09:00:00.

Special Time Contact Local Time folder

The Special Contact Local Time folder contains additional date and time information for a contact. This is a folder of the Time Contact Local Time folder.

Parameter Name	Type	Description
Contact The Week of the Year	number	The week of the year of the entire contact.
Contact The Day of Year	number	The day of the year of the entire contact.
Contact The Week of Month	number	The week of the month of the entire contact.
Contact The Day of Week	number	The day of the week of the entire contact, for example, Sun, Mon, and so on.
Contact Is Weekend	number	Indicates whether the date/time of the entire contact is a weekend. 1=true, 0=false The definition of weekend is derived from the system configuration.

Contact Categories folder

The Contact Categories folder contains the Speech Analytics categories related to an entire contact.

Parameter Name	Type	Description
Category Type	number	The source of the Speech Analytics category. Currently only Speech Analytics is supported. 1=Speech Analytics
Category Name	string	The name of the Speech Analytics category.
Project Type	number	The source of the Speech Analytics category. Currently only Speech Analytics is supported. 1 = Speech Analytics
Project Name	string	The Speech Analytics project name.

Flag folder

The Flags folder contains the flags related to an entire contact.

Parameter Name	Type	Description
Flag Name	string	Name of the flag.
Flag's Count	aggregate	Counts the flags.

Time Flag Local Time folder

The Time Flag Local Time folder contains information on the local date and time the flag is submitted.

Parameter Name	Type	Description
The Year	number	The year the flag is submitted.
The Quarter	number	The quarter the flag is submitted.
The Month	number	The month of the flag.
The Day of the Month	number	The day of the month the flag is submitted.
The Hour	number	The hour the flag is submitted.
The Datetime	datetime	The full date and time the flag is submitted. For example, 1-04-2006-09:00:00.

Special Time Flag Local Time folder

The Special Time Flag Local Time folder contains the additional date and time information for a flag. This is a folder of the Time Flag Local Time folder.

Parameter Name	Type	Description
The Week of the Year	number	The week of the year the flag is submitted
The Day of Year	number	The day of the year the flag is submitted
The Week of Month	number	The week of the month the flag is submitted
The Day of Week	number	The day of the week the flag is submitted, for example, Sun, Mon, and so on.
Is Weekend	number	Indicates whether the date/time the flag is submitted is a weekend. 1=true, 0=false The definition of weekend is derived from the system configuration.

Flag Submitter folder

The Flag Submit folder contains the general properties of the user who submitted the flag.

Parameter Name	Type	Description
Flag Submitter Name	string	The name of the user who submitted the flag.
Flagger PBX ID	string	The PBX ID of the user who submitted the flag.
Flagger Email	string	The email address of the user who submitted the flag.
Flagger NT Login	string	The NT login of the user who submitted the flag.

FLAG: Evaluators Visibility folder

The FLAG: Evaluators Visibility folder filters the results based on the visibility of the evaluator who submitted the flag.

Parameter Name	Type	Description
Evaluated by me	filter	Filters results based on forms evaluated by me.
My direct evaluators	filter	Filters results based on forms evaluated by me or by evaluators in my organization/groups/subgroups.
All my evaluators	filter	Filters results based on forms evaluated by me, by evaluators in my organization/groups/subgroups or by evaluators in any organizations/groups above mine.

CCD Visibility folder

The CCD Visibility folder filters the results based on the conditional custom data of the contact.

Parameter Name	Type	Description
CONTACT: Filter by My CCDs 1, 6, 11	Filter	Filter the results based on the conditional custom data (1, 6, 11).
CONTACT: Filter by My CCDs 2, 7,12	Filter	Filter the results based on the conditional custom data (2, 7,12).
CONTACT: Filter by My CCDs 3, 8,13	Filter	Filter the results based on the conditional custom data (3, 8,13).
CONTACT: Filter by My CCDs 4, 9,14	Filter	Filter the results based on the conditional custom data (4, 9,14).
CONTACT: Filter by My CCDs 5, 10, 15	Filter	Filter the results based on the conditional custom data (5, 10, 15).
CONTACT: Filter by My CCDs 1-15	Filter	Filter the results based on the conditional custom data (1-15).

ASSESS: Assessors Visibility folder

The Assess: Assessors Visibility folder filters the results based on the visibility of the assessor who performed the assessment.

Parameter Name	Type	Description
Assessed by me	Filter	Filters results based on forms assessed by me.
My Direct assessors	Filter	Filters results based on forms assessed by my direct assessor or by assessors in my organization/groups/subgroups.

Parameter Name	Type	Description
All my assessors	Filter	Filters results based on forms assessed by me, by assessors in my organization/groups/subgroups or by assessors in any organizations/groups above mine.

Assessments Form Components Scores

The Assessments Form Component Scores entity has an assessment folder used to create Ad Hoc reports.

Related topics

[Assessments Form Components Scores entity](#), page 84

[Annotations folder](#), page 85

Assessments Form Components Scores entity

The Assessments Form Components Score entity contains form component details.

Parameter Name	Type	Description
Form Component Maximum Possible Score	Number	Maximum possible score for the assessment form component.
Form Component Sum of Possible Scores	Number	The sum of maximum possible scores for the assessment form component.
Form Component Sum of Attained Scores	Number	The sum of attained scores for the assessment form component.
Form Component Score	Number	The assessment form component score
Form Component Type	number	The form component type. 1 = section 2 = category 3 = question.
Form Component Title	string	The name of the form component.
Answer Title	number	The title of the answer in the assessment form.

Parameter Name	Type	Description
Reason Name	string	The caption for the reason.
Form Components Comments	string	Comments entered for this component.
Score Textual Value	string	The score represented as a textual value.
Assessment Form Components Average Score	aggregate	The average score given to the completed assessments form component.
Assessment Form Components Count	aggregate	The number of completed assessments per form component.

Annotations folder

Annotations are textual comments that are used to tag interactions at specific time events. When performing evaluations/assessments, you can append annotations to a form component. An interaction also contains CTI and Recorder events (for example, call started or call transferred).

The Annotations folders contains annotation properties (it does not contain information on events).

Parameter Name	Type	Description
Annotation Offset	number	Offset from interaction start (seconds)
Annotation Access permission	number	1 - Private 2 - Public
Annotation Local Start Time	datetime	The system local date and time the annotation is created. The time is stored in hours and minutes.

Parameter Name	Type	Description
Annotation Name	string	The annotation name
Annotation Content	string	Content entered by the user (can be free text or link to a file)
Annotation Count	number aggregate	Number of annotations
Annotation User Name	string	User who made the annotation
Tag_Key (Internal Use Only)	N/A	Internal Use Only

Contacts model

The Contacts model is used to create reports that focus on recorded interaction and contact events, and productivity factors. The Contacts model contains four entities, and each entity has a set of folders used to create Ad Hoc reports.

Topics

Contacts	88
Interaction	94
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Contacts

Contacts entity focuses on recorded contact event. It has a set of contact folders used to create Ad Hoc reports.

Related topics

[Contacts entity](#), page 88

[Contact Custom Data folder](#), page 90

[Contact Conditional Custom Data folder](#), page 90

[Time Contact Local Time folder](#), page 90

[Special Time Contact Local Time folder](#), page 91

[Contact Categories folder](#), page 92

[Filter by My CCDs folder](#), page 92

Contacts entity

The Contact entity contains details for an entire contact.

Entity	Type	Description
System Start Time	datetime	The system date and time the contact started. The time is stored in hours and minutes.
System End Time	datetime	The system date and time the contact ended. The time is stored in hours and minutes.
Local Start Time	datetime	The system local date and time the contact started. The time is stored in hours and minutes.
Local End Time	datetime	The system local date and time the contact ended. The time is stored in hours and minutes.
DNIS	string	The DNIS is the dialed number identification service (DNIS) associated with the first recorded interaction of a contact. DNIS identifies the number that was dialed, useful in enterprises to which contact to multiple numbers may be directed.
ANI	string	The ANI is the Automatic number identification (ANI) or Caller ID associated to the first recorded interaction of a contact. ANI is derived from CTI and is specific to the switch and contact scenario.
Call ID	string	Identifies the contact.

Entity	Type	Description
Call ID String	string	Identifies the contact.
Customer ID	number	Identifies the customer for the entire contact.
Contact Duration	number	The duration of the entire contact in seconds.
Exception Reason	number	The reason for the marked exception.
Is Exception	number	A contact that is marked as an exception.
Num of Transfers	number	The number of transfers during the entire contact. Note: In the case of disconnection scenarios, a value of -1 is inserted for this parameter.
Num of Conferences	number	The number of conferences during the entire contact. Note: In the case of disconnection scenarios, a value of -1 is inserted for this parameter.
Num of Holds	number	The number of holds during the entire contact.
Total Hold Time	number	The total time of holds during the entire contact.
Contact Count	aggregate	The number of contacts.
Average Duration Time	aggregate	The average duration time of the entire contact in seconds.
Average Num of Transfers	aggregate	The average number of transfers during the entire contact
Average Num of Conferences	aggregate	The average number of conferences during the entire contact
Average Num of Holds	aggregate	The average number of holds during the contact.
Average Total Hold Time	aggregate	The total average time of holds during the entire contact.
Contact Month of Year (indexed)	number	The month of the year of the contact.

Entity	Type	Description
Session Month of Year (indexed)	number	The month of the year of the interaction.
Contact Local Date/Time (indexed)	datetime	The local date and time of the contact.

Contact Custom Data folder

The Contact Custom Data folder contains Custom Data (CD) fields for an entire contact.

Parameter Name	Type	Description
Contact CD 1 - Contact CD 75	string	Values in the custom data fields, from 1 to 75.

Contact Conditional Custom Data folder

The Contact Conditional Custom Data folder contains Conditional Custom Data (CCD) fields for an entire contact.

Entity Name	Type	Description
Contact CCD 1 - Contact CCD 15	string	Values in the conditional custom data fields, from 1 to 15.

Time Contact Local Time folder

The Contact Local Time folder contains fields relating to the local date and time of the entire contact.

Entity Name	Type	Description
Contact Year	number	The year of the entire contact.
Contact Quarter	number	The quarter of the entire contact.
Contact Month	number	The month of the contact.

Entity Name	Type	Description
Contact Day of the Month	number	The day of the month of the entire contact.
Contact Hour	number	The hour of the entire contact.
Contact Datetime	datetime	The full date and time of the entire contact. For example, 1-04-2006-09:00:00.

Special Time Contact Local Time folder

The Special Local Time folder contains fields for additional date and time information for an entire contact. This is a folder of the Time Contact Local Time folder.

Entity Name	Type	Description
Contact Week Of Year	number	The week of the year of the entire contact.
Contact Day Of Year	number	The day of the year of the entire contact.
Contact Week Of Month	number	The week of the month of the entire contact.
Contact Day of Week	number	The day of the week of the entire contact, for example, Sun, Mon, and so on.
Contact Is Weekend	number	Indicates whether the date/time of the entire contact is a weekend. 1=true, 0=false The definition of weekend is derived from the system configuration.

Contact Categories folder

The Contact Category folder contains Speech Analytics categories related to an entire contact.

Entity Name	Type	Description
Category Type	number	The source of the Speech Analytics category. Currently only Speech Analytics is supported. 1=Speech Analytics
Category Name	string	The name of the Speech Analytics category.
Project Type	number	The source of the Speech Analytics category. Currently only Speech Analytics is supported. 1 = Speech Analytics
Project Name	string	The Speech Analytics project name.
Contact Categories Count	aggregate	Counts categories.

Filter by My CCDs folder

The Filter by My CCDs folder filters the results based on the conditional custom data of the contact.

Parameter Name	Type	Description
Filter by My CCDs 1-15	Filter	Filter the results based on the conditional custom data (1-15).
Filter by My CCDs 1, 6, 11	Filter	Filter the results based on the conditional custom data (1, 6, 11).
Filter by My CCDs 2, 7,12	Filter	Filter the results based on the conditional custom data (2, 7,12).
Filter by My CCDs 3, 8,13	Filter	Filter the results based on the conditional custom data (3, 8,13).
Filter by My CCDs 4, 9,14	Filter	Filter the results based on the conditional custom data (4, 9,14).

Parameter Name	Type	Description
Filter by My CCDs 5, 10, 15	Filter	Filter the results based on the conditional custom data (5, 10, 15).

Interaction

The Interactions entity focuses on recorded interactions. It has a set of interactions folders used to create Ad Hoc reports.

Related topics

[Interaction entity](#), page 94

[Employee folder](#), page 98

[Time Interaction Local Time folder](#), page 98

[Special Time Interaction Local Time Entities](#), page 99

[Interaction Custom Data folder](#), page 100

[Interaction Conditional Custom Data folder](#), page 100

[Filter By My CCDs folder](#), page 100

[Interaction Categories folder](#), page 101

[Interaction Transcribed folder](#), page 101

[Annotations folder](#), page 102

Interaction entity

The Interactions entity contains general properties for an interaction.



When you build a query, do not assume that each Interaction object has a related Contact object. In some instances, it is possible to have a Interaction object that does not have an associated Contact object.

Entity Name	Type	Description
Intellilink ID	number	Identifies the CTI Link that handled the interaction.
SID Key	number	Uniquely identifies the Interaction.
Call ID	string	Identifies the contact.
Call ID String	string	Identifies the contact.
Total Silence-Time	number	The total silence time during the interactions.
Total Customer Talk-Time	number	Total time during which only the customer spoke during an interaction.

Entity Name	Type	Description
Total Employee Talk-Time	number	Total time during which only the employee spoke during an interaction.
Number of Customer-Initiated Talk-Overs	number	Number of times during the interactions that the customer initiated a talk over the employee.
Number of Employee-Initiated Talk-Overs	number	Number of times during the interactions that the employee initiated a talk over the customer.
Switch Call ID	string	The switch call ID of the entire contact.
Num of Transfers	number	The number of transfers during the entire contact. Note: In the case of disconnection scenarios, a value of -1 is inserted for this parameter.
Num of Conferences	number	The number of conference calls during the entire contact. Note: In the case of disconnection scenarios, a value of -1 is inserted for this parameter.
Num of Holds	tinyint	The number of holds during the entire contact.
Total Hold Time	number	The total time of holds during the entire contact.
Is Exception	number	Indicates whether the interaction is an exception. 0 = not exception, 1 = exception.
Exception Reason		The reason for the marked exception.
Switch ID	number	The ID of the switch from which the interaction is routed.
Is Screen	number	Indicates whether screens were recorded for this interaction. 0 = no screen recording, 1 = screen recording.

Entity Name	Type	Description
Extension	number	The extension from which the interaction is conducted
String Extension	string	The string extension from which the interaction is conducted
Direction	number	The direction of the interaction. The direction is determined by the first interaction. Possible values: 0 - Unknown 1 - Inbound (Incoming) 2 - Outbound (Outgoing) 3 - Internal
PBX ID	string	The PBX ID of the employee who handled the interaction.
DNIS	string	The DNIS is the dialed number identification service (DNIS) associated to the interaction. DNIS identifies the number that was dialed, useful in enterprises to which contact to multiple numbers may be directed.
ANI	string	The ANI is the Automatic number identification (ANI) or Caller ID associated to the interaction. ANI is derived from CTI and is specific to the switch and contact scenario.
Channel Num	number	The channel number of the recorder that recorded the interaction.
Unit Num	number	The unit number of the recorder recorded the interaction.
Interaction Duration	number	The duration of the interaction in seconds
System Start Time	datetime	The system date and time the interaction started. The time is stored in hours and minutes.
System End Time	datetime	The system date and time the interaction ended. The time is stored in hours and minutes.

Entity Name	Type	Description
Local Start Time	datetime	The system local date and time the interaction started. The time is stored in hours and minutes.
Local End Time	datetime	The Impact local date and time the interaction ended. The time is stored in hours and minutes.
Wrapup Time	datetime	The number of seconds between the end of the current interaction, and the end of the system's recording of the current interaction's related screens.
Remark	string	The remark made on this interaction.
Remarked At	datetime	The System Time and date the remark is made.
Interaction Count	aggregate	The number of interactions.
Average Duration Time	aggregate	The average duration of the interaction.
Average Num of Transfers	aggregate	The average number of transfers during the entire contact.
Average Num of Conferences	aggregate	The average number of conferences during the entire contact.
Average Num of Holds	aggregate	The average number of holds during the contact.
Average Total Hold Time	aggregate	The total average time of holds during the entire contact.
Average Wrapup Time	aggregate	The average wrapup time of the entire contact.
Interaction Type Name	string	The name of the interaction type, for example <i>phone call</i> or <i>desktop event</i> .
Media Type Set	string	The set of media types associated with an interaction, for example <i>audio and screen</i> .

Employee folder

The Employee folder general employee properties.

Entity Name	Type	Description
Employee Name	string	The employee's name.
Employee PBX ID	string	The employee's PBX ID.
Employee Email	string	The employee's email address.
Employee NT Login	string	The employee's NT login.

Time Interaction Local Time folder

The Time Interaction Local Time folder contains information about the local date and time for a interaction.

Parameter Name	Type	Description
Interaction Year	number	The year of the interaction.
Interaction Quarter	number	The quarter of the interaction.
Interaction Month	number	The month of the interaction.
Interaction Day of Month	number	The day of the month of the interaction.
Interaction Hour	number	The hour of the interaction.
Interaction Datetime (indexed)	datetime	The full date and time of the interaction. For example: 1-04-2006-14:22:00

Special Time Interaction Local Time Entities

The Special Time Interaction Local Time folder contains additional date and time information for an interaction. This is a folder of the Time Interaction Local Time folder.

Parameter Name	Type	Description
Interaction Week of Year	number	The week of the year of the interaction.
Interaction Day of Year	number	The day of the year of the interaction.
Interaction Week of Month	number	The week of the month of the interaction.
Interaction Day of Week	number	The day of the week of the interaction. For example, Sun, Mon, and so on.
Interaction Is Weekend	number	Indicates whether the date/time of the interaction is a weekend. 1=true, 0=false The definition of weekend is derived from the system configuration.
Interaction Month of Year (indexed)	number	Indicates whether the date/time of the interaction is a weekend. 1=true, 0=false The definition of weekend is derived from the system configuration.
Contact Month of Year (indexed)	number	Indicates whether the date/time of the interaction is a weekend. 1=true, 0=false The definition of weekend is derived from the system configuration.

Interaction Custom Data folder

The Interaction Custom Data folder contains interaction custom data (CD) fields.

Parameter Name	Type	Description
Interaction CD 1 - Interaction CD 75	string	Values in the first-seventy fifth custom data fields.

Interaction Conditional Custom Data folder

The Interaction Conditional Custom Data folder contains interaction conditional Custom data (CCD) fields.

Parameter Name	Type	Description
Interaction CCD 1 - Interaction CCD 15	string	Values in the first - fifteenth form custom data fields.

Filter By My CCDs folder

The Filter By My CCD's folder filters the results based on the conditional custom data of the interaction.

Parameter Name	Type	Description
Filter by My CCDs 1-15	Filter	Filter the results based on the conditional custom data (1-15).
Filter by My CCDs 1, 6, 11	Filter	Filter the results based on the conditional custom data (1, 6, 11).
Filter by My CCDs 2, 7,12	Filter	Filter the results based on the conditional custom data (2, 7,12).
Filter by My CCDs 3, 8,13	Filter	Filter the results based on the conditional custom data (3, 8,13).

Parameter Name	Type	Description
Filter by My CCDs 4, 9,14	Filter	Filter the results based on the conditional custom data (4, 9,14).
Filter by My CCDs 5, 10, 15	Filter	Filter the results based on the conditional custom data (5, 10, 15).

Interaction Categories folder

The Interaction Categories folder contains information s about the Speech Analytics categories related to an interaction.

Entity Name	Type	Description
Category Type	number	The source of the Speech Analytics category. Currently only Speech Analytics is supported. 1=Speech Analytics
Category Name	string	The name of the Speech Analytics category.
Project Type	number	The source of the Speech Analytics category. Currently only Speech Analytics is supported. 1 = Speech Analytics
Project Name	string	The Speech Analytics project name.
Interaction Categories Count	aggregate	Counts categories.

Interaction Transcribed folder

The Interactions Transcribed folder contains details on interaction that have been transcribed and indexed by the Speech Analytics application. This includes interactions that have been deleted from the Index but still exist in the Data Warehouse.

Entity Name	Type	Description
Interaction Local Time (indexed)	datetime	The local time the interaction started.

Entity Name	Type	Description
Project Type	number	The source of the Speech Analytics transcribed data. Currently only Speech Analytics is supported. 1 = Speech Analytics.
Project Name	string	The Speech Analytics project name.
Interaction Transcribed Count	aggregate	Counts the number of transcribed interactions.



If you select a parameter from the **Interaction Transcribed** folder together with parameters from other folders or folders, duplicate results may appear in your report. To avoid this, when selecting parameter from the **Interaction Transcribed** folder, do not include parameters from any other folder or folder in your report.

Annotations folder

The Annotations folder contains annotation properties (it does not contain information on events)

Entity Name	Type	Description
Annotation Offset	number	Offset from interaction start (seconds).
Annotation Access permission	tinyint	1 - Private 2 - Public
Annotation User Name	string	User who made the annotation.
Annotation Local Start Time	datetime	The system local date and time the annotation is created. The time is stored in hours and minutes.
Annotation Name	string	The annotation name.
Annotation Content	string	Content entered by the user (can be free text or link to a file).

Entity Name	Type	Description
Annotation Count	number aggregate	Number of annotations.

AGGR: Interaction

AGGR: Interaction entity has a set of folders used to create Ad Hoc reports.

Related topics

[AGGR: Interaction entity](#), page 104

[AGGR: Custom Data folder](#), page 104

[AGGR: Employee folder](#), page 105

[AGGR: Time Interaction Local Time folder](#), page 105

[AGGR: Special Time Interaction Local Time folder](#), page 106

[AGGR: Filter By My CCDs folder](#), page 106

AGGR: Interaction entity

The AGGR: Interaction entity contains aggregated information for an interaction.

Entity Name	Type	Description
Local Time	datetime	The local time the interaction started.
Work Time	datetime	The employee's shift time.
Num of Interactions	aggregate	The number of interactions.
Average Duration Time	aggregate	The average duration time of an interaction.

AGGR: Custom Data folder

The AGGR: Custom Data folders contains aggregated custom data for an interaction.

Entity Name	Type	Description
Interaction CCD 1, 6, 11		Values in the first, sixth, and eleventh conditional custom data fields.

AGGR: Employee folder

The AGGR: Employee folder contains general employee properties.

Entity Name	Type	Description
Employee Name	string	The employee's name.
Employee PBX ID	string	The employee's PBX ID.
Employee Email	string	The employee's email address.
Employee NT Login	string	The employee's NT login.

AGGR: Time Interaction Local Time folder

The AGGR: Time Interaction Local Time folder aggregates date and time information for an interaction.

Parameter Name	Type	Description
AGGR: Year	number	The year of the interaction.
AGGR: Quarter	number	The quarter of the interaction.
AGGR: Month	number	The month of the interaction.
AGGR: Day of the Month	number	The day of the month of the interaction.
AGGR: Hour	number	The hour of the interaction.
AGGR: Datetime	datetime	The full date and time of the interaction. For example, 1-04-2006-14:00:00.

AGGR: Special Time Interaction Local Time folder

The AGGR: Special Time Interaction Local Time folder contains additional aggregate date and time information for an interaction. This is a folder of the AGGR: Time Interaction Local Time folder.

Parameter Name	Type	Description
AGGR: Week of the Year	number	The week of the year of the interaction.
AGGR: Day of Year	number	The day of the year of the interaction.
AGGR: Week of Month	number	The week of the month of the interaction.
AGGR: Day of Week	number	The day of the week of the interaction. For example Sun, Mon and so on
AGGR: Is Weekend	number	Indicates whether the date/time of the interaction is a weekend. 1=true, 0=false The definition of weekend is derived from the system configuration.

AGGR: Filter By My CCDs folder

The AGGR: Filter By My CCD folder filters the results based on the aggregate conditional custom data of the interaction.

Parameter Name	Type	Description
AGGR: Filter by My CCD's 1, 6, 11	Filter	Filter the results based on the aggregate conditional custom data (1, 6, 11) of the interaction.

AGGR: Speech Usage

AGGR: Speech Usage entity contains a set of folders used to create Ad Hoc reports.

Related topics

[AGGR: By Project folder](#), page 107

[AGGR: By Enterprise folder](#), page 108

AGGR: By Project folder

The AGGR: By Project folder contains speech usage statistics per project, based on employee, extensions and volume processed by the Speech Analytics application.

Entity Name	Type	Description
Project Name	string	The Speech Analytics project name.
Extension Count	aggregate	The number of individual extensions that have at least one associated interaction that was transcribed and indexed for a specific project in a specific month.
Employee Count	aggregate	The number of individual employees that have at least one associated interaction that was transcribed and indexed for a specific project in a specific month.
Interaction Count	aggregate	The number of interactions that were transcribed and indexed for a specific project in a specific month.
Total Duration	aggregate	The total duration (in seconds) of the interactions that were transcribed and indexed for a specific project in a specific month.
Month	number	The month for which the above counts were performed.
Year	number	The year for which the above counts were performed.

AGGR: By Enterprise folder

The AGGR: By Enterprise folder contains speech usage statistics for the entire enterprise (for all projects) based on employees, extensions and volume processed by the Speech Analytics application.

Parameter Name	Type	Description
Extension Count	aggregate	The number of individual extensions in the enterprise that have at least one associated interaction that was transcribed and indexed in a specific month.
Employee Count	aggregate	The number of individual employees in the enterprise that have at least one associated interaction that was transcribed and indexed in a specific month.
Interaction Count	aggregate	The number of interactions in the enterprise that were transcribed and indexed in a specific month.
Total Duration	aggregate	The total duration (in seconds) of the interactions in the enterprise that were transcribed and indexed in a specific month.
Month	number	The month for which the above counts were performed.
Year	number	The year for which the above counts were performed.

Evaluations model

The Evaluations model is used to create reports that focus on evaluation scores, activity, and productivity. The Evaluation model contains two entities, and each entity has a set of folders used to create Ad Hoc reports.

Topics

Evaluation Form Components Scores	110
Evaluation Form Scores	113

Evaluation Form Components Scores

Evaluation Form Components Scores entity has a set of evaluation folders used to create Ad Hoc reports.

Related topics

[Evaluation Form Components Scores entity](#), page 110

[Annotations folder](#), page 112

Evaluation Form Components Scores entity

The Evaluation Form Components Score entity contains information relating to the form components score for an evaluation.

Parameter Name	Type	Description
Form Component Maximum Possible Score	Number	Maximum possible score for the evaluation form component.
Form Component Sum of Possible Scores	Number	The sum of maximum possible scores for the evaluation form component.
Form Component Sum of Attained Scores	Number	The sum of attained scores for the evaluation form component.
Score Textual Value (Text List Support)	string	The score represented as a textual value. For multiple choice text list answers, each answer is displayed in a new row. Similar to Score Textual Value.
Form Component Type	number	The form component type. 1 = section 2 = category 3 = question

Parameter Name	Type	Description
Form Component Title	string	The name of the form component.
Score_answer_id (Internal Use Only)	N/A	Internal use Only.
Form Component Score	number	The evaluation form component score.
Form Component Comments	string	Comments entered for this component.
Score Textual Value	string	The score represented as a textual value.
Evaluation Form Component Average Score	aggregate	The average score given to each component in the completed evaluation form.
Evaluation Form Components Count	aggregate	The number of completed evaluations per form component.
Answer Title	string	The title of the answer in the evaluation form.
Reason Name	string	The name of the reason.

Annotations folder

The Annotations folders contains annotation properties (it does not contain information on events).

Parameter Name	Type	Description
Annotation Offset	number	Offset from interaction start (seconds).
Annotation Access permission	tinyint	1 - Private 2 - Public
Annotation User Name	string	User who made the annotation.
tag_key (Internal use Only)	N/A	Internal use Only.
Annotation Local Start Time	datetime	The system local date and time the annotation is created. The time is stored in hours and minutes.
Annotation Name	string	The annotation name.
Annotation Content	string	Content entered by the user (can be free text or link to a file).
Annotation Count	number aggregate	Number of annotations.
eval_key (Internal Use Only)	N/A	Internal Use Only.

Evaluation Form Scores

Evaluation Form Scores entity has a set of evaluation folders used to create Ad Hoc reports.

Related topics

[Evaluation Form Scores entity](#), page 113

[Form folder](#), page 115

[Evaluator folder](#), page 115

[Evaluatee folder](#), page 116

[Time Evaluation Local Time folder](#), page 116

[Special Evaluation Local Time folder](#), page 117

[Contact folder](#), page 117

[Evaluation Custom Data folder](#), page 118

[Interaction folder](#), page 119

[Time Interaction Local Time folder](#), page 121

[Special Time Interaction Local Time folder](#), page 122

[Interaction Custom Data folder](#), page 122

[Interaction Conditional Custom Data folder](#), page 122

[Interaction Categories folder](#), page 123

[Flag folder](#), page 123

[Time Flag Local Time folder](#), page 124

[Special Time Flag Local Time folder](#), page 124

[Flag Submitter folder](#), page 125

[FLAG: Evaluators Visibility folder](#), page 125

[INTERACTION: Filter By My CCDs folder](#), page 126

[EVAL: Evaluators Visibility folder](#), page 126

Evaluation Form Scores entity

The Evaluation Form Scores entity contains information on the scores for an evaluation form.

Parameter Name	Type	Description
Evaluation Maximum Possible Score	Number	Maximum possible score for the evaluation form.

Parameter Name	Type	Description
Evaluation Sum of Possible Scores	Number	The sum of maximum possible scores for the evaluation form.
Evaluation Sum of Attained Scores	Number	The sum of attained scores for the evaluation form.
Eval Local Datetime	datetime	The system local date and time the evaluation was submitted.
Group Path	string	Identifies the location of the group in the hierarchy. The format of the path is a delimited string, as follows: <root group>\<group 1 name>\...\<current group name>. Note that the delimiter is configurable (i.e. the \ can be replaced with another symbol.)
Status2 Title	string	Status2 represented as a textual value.
Status1 Title	string	Status1 represented as a textual value.
Group (indexed)	string	The name of the group/organization.
Pass Fail	number	Identifies whether the evaluation is passed or failed, where 0 = fail, 1 = pass.
Rating	string	The caption of the rating. For example, excellent, good, fair, etc.
Eval System Datetime	datetime	The system date and time the evaluation was submitted.
Comments	string	Comments entered into the Comments field in the form footer.
Notes	string	Text in the form header Notes field.
Status1	number	The value of the first status field (a custom field used for data collection).

Parameter Name	Type	Description
Status2	number	The value of the second status field (a custom field used for data collection).
Evaluation Score	numeric (7, 2)	The total score achieved in the evaluation accurate to 2 decimal points (e.g. 100.25).
Evaluation Form Average Score	aggregate	Average score of the evaluation.
Evaluation Form Count	aggregate	The number of evaluations.

Form folder

The Form folder contains form details.

Parameter Name	Type	Description
Form	string	The name of the form.
Form Revision ID	number	Identifies the revision of the evaluation form.
Form Type ID	number	Identifies the form type. Possible options are 1 = evaluation, 2 = assessment, 3 = template....

Evaluator folder

The Evaluator folder contains evaluator details.

Parameter Name	Type	Description
Evaluator Name	string	The evaluator's name.
Evaluator PBX ID	string	The evaluator's PBX ID.

Parameter Name	Type	Description
Evaluator Email	string	The evaluator's email address.
Evaluator NT Login	string	The evaluator's NT login.

Evaluatee folder

The Evaluatee folder contains evaluatee details.

Parameter Name	Type	Description
Evaluatee Name	string	The evaluatee's name.
Evaluatee PBX ID	string	The evaluatee's PBX ID.
Evaluatee Email	string	The evaluatee's email address.
Evaluatee NT Login	string	The evaluatee's NT login.

Time Evaluation Local Time folder

The Time Evaluation Local Time folder contains local date and time details of the evaluation.

Parameter Name	Type	Description
Evaluation Year	number	The year of the evaluation.
Evaluation Quarter	number	The quarter of the evaluation.
Evaluation Month	number	The month of the evaluation.
Evaluation Day of the Month	number	The day of the month of the evaluation.

Parameter Name	Type	Description
Evaluation Hour	number	The hour of the evaluation.
Evaluation Datetime (indexed)	datetime	The full date and time of the evaluation. For example, 1-04-2006-14:00:00.

Special Evaluation Local Time folder

The Special Evaluation Local Time folder contains additional date and time information for an evaluation. This is a folder of the Time Evaluation Local Time folder.

Parameter Name	Type	Description
Evaluation Week of the Year	number	The week of the month of the evaluation.
Evaluation Day of Year	number	The day of the year of the evaluation.
Evaluation Week of Month	number	The week of the month of the evaluation.
Evaluation Day of Week	number	The day of the week of the evaluation. For example, Sun, Mon and so on.
Evaluation Is Weekend	number	Indicates whether the date/time of the evaluation is a weekend. 1=true, 0=false The definition of weekend is derived from the system configuration.

Contact folder

The Contacts folder contains details for an entire contact.

Parameter Name	Type	Description
Call ID String	string	Identifies the contact.

Parameter Name	Type	Description
Call ID	string	Identifies the contact.
Exception Reason	number	The reason for the marked exception.
Is Exception	number	An entire contact that is marked as an exception.
Num of Transfers	number	The number of transfers during the entire contact. Note: In the case of disconnection scenarios, a value of -1 is inserted for this parameter.
Num of Conferences	number	The number of conferences during the entire contact. Note: In the case of disconnection scenarios, a value of -1 is inserted for this parameter.
Num of Holds	number	The number of holds during the entire contact.
Total Hold Time	number	The total time of holds during the entire contact.

Evaluation Custom Data folder

The Evaluation Custom Data folder contains information on custom data fields in the evaluation form.

Parameter Name	Type	Description
Contact CD 1- Contact CD 20	string	Values in the first - twentieth form custom data fields.

Interaction folder

The Interaction folder contains general properties for an interaction.

Parameter Name	Type	Description
IntelliLink ID	number	Identifies the CTI Link that handled the interaction.
Total Silence-Time	number	The total silence time during the interactions.
Total Customer Talk-Time	number	Total time during which only the customer spoke during an interaction.
Total Employee Talk-Time	number	Total time during which only the employee spoke during an interaction.
Number of Customer-Initiated Talk-Overs	number	Number of times during the interactions that the customer initiated a talk over the employee.
Number of Employee-Initiated Talk-Overs	number	Number of times during the interactions that the employee initiated a talk over the customer.
Switch Call ID	char (16)	The switch call ID of the interaction.
Switch ID	number	The ID of the switch from which the interaction is routed.
Is Screen	number	Indicates whether screens were recorded for this interaction. 0 = no screen recording, 1 = screen recording.
Extension	number	The extension from which the interaction is conducted.
String Extension	string	The string extension from which the interaction is conducted

Parameter Name	Type	Description
Direction	number	The direction of the interaction. Possible values: 0 - Unknown 1 - Inbound (Incoming) 2 - Outbound (Outgoing) 3 - Internal
PBX ID	char (15)	The PBX ID of the agent who handled the interaction.
DNIS	char (15)	The DNIS is the dialed number identification service (DNIS) associated to the interaction. DNIS identifies the number that was dialed, useful in enterprises to which contacts to multiple numbers may be directed.
ANI	char (15)	The ANI is the Automatic number identification (ANI) or Caller ID associated to the interaction. ANI is derived from CTI and is specific to the switch and contact scenario.
Channel Num	number	The channel number of the recorder that recorded the interaction.
Unit Num	number	The unit number of the recorder that recorded the entire interaction.
Interaction Duration	number	The duration of the interaction in seconds
System Start Time	datetime	The system date and time the interaction started. The time is stored in hours and minutes.
System End Time	datetime	The system date and time the interaction ended. The time is stored in hours and minutes.
Local Start Time	datetime	The system local date and time the interaction started. The time is stored in hours and minutes.
Local End Time	datetime	The system local date and time the interaction ended. The time is stored in hours and minutes.

Parameter Name	Type	Description
Wrapup Time	datetime	The number of seconds between the end of the current interaction, and the end of the system's recording of the current interaction's related screens.
Remark	string	The remark made on this interaction.
Remarked At	datetime	The System Time and date the remark is made.

Time Interaction Local Time folder

The Time Interaction Local Time folder contains information on local date and time of a interaction. This is a folder of the Interaction folder.

Parameter Name	Type	Description
Interaction Year	number	The year of the interaction.
Interaction Quarter	number	The quarter of the interaction.
Interaction Month	number	The month of the interaction.
Interaction Day of the Month	number	The day of the month of the interaction.
Interaction Hour	number	The hour of the interaction.
Interaction Datetime (indexed)	datetime	The full date and time of the interaction. For example: 1-04-2006-14:22:00

Special Time Interaction Local Time folder

The Special Time Interaction Local Time folder contains additional date and time information for a interaction. This is a folder of the Time Interaction Local Time folder.

Parameter Name	Type	Description
Interaction Week of the Year	number	The week of the year of the interaction.
Interaction Day of Year	number	The day of the year of the interaction.
Interaction Week of Month	number	The week of the month of the interaction.
Interaction Day of Week	number	The day of the week of the interaction. For example, Sun, Mon, and so on.
Interaction Is Weekend	number	Indicates whether the date/time of the interaction is a weekend. 1=true, 0=false The definition of weekend is derived from the system configuration.

Interaction Custom Data folder

The Interaction Custom Data folder contains custom data fields for a interaction. This is a folder of the Interaction folder.

Parameter Name	Type	Description
Contact CD 1 - Contact CD 75	string	Values in the first-seventy fifth custom data fields.

Interaction Conditional Custom Data folder

The Interaction Conditional Custom Data folder contains CCD fields for an interaction. This is a folder of the Interaction folder.

Parameter Name	Type	Description
Contact CCD 1 - Contact CCD 15	string	Values in the first - fifteenth form custom data fields.

Interaction Categories folder

The Interaction Categories folder contains information on Speech Analytics categories related to an interaction.

Parameter Name	Type	Description
Category Type	number	The source of the Speech Analytics category. Currently only Speech Analytics is supported. 1=Speech Analytics
Category Name	string	The name of the Speech Analytics category.
Project Type	number	The source of the Speech Analytics category. Currently only Speech Analytics is supported. 1 = Speech Analytics
Project Name	string	The Speech Analytics project name.

Flag folder

The Flags folder contains information on flags related to an evaluation.

Parameter Name	Type	Description
Flag Name	string	Name of the flag.
Flag's Count	aggregate	Counts the flags.

Time Flag Local Time folder

The Time Flag Local Time folder contains information on local date and time the flag is submitted.

Parameter Name	Type	Description
The Year	number	The year the flag is submitted.
The Quarter	number	The quarter the flag is submitted.
The Month	number	The month of the flag.
The Day of the Month	number	The day of the month the flag is submitted.
The Hour	number	The hour the flag is submitted.
The Datetime	datetime	The full date and time the flag is submitted. For example, 1-04-2006-09:00:00.

Special Time Flag Local Time folder

The Special Time Flag Local Time folder contains additional date and time information for a flag. This is a folder of the Time Flag Local Time folder.

Parameter Name	Type	Description
The Week of the Year	number	The week of the year the flag is submitted
The Day of Year	number	The day of the year the flag is submitted
The Week of Month	number	The week of the month the flag is submitted
The Day of Week	number	The day of the week the flag is submitted, for example, Sun, Mon, and so on.
Is Weekend	number	Indicates whether the date/time the flag is submitted is a weekend. 1=true, 0=false The definition of weekend is derived from the system configuration.

Flag Submitter folder

The Flag Submitter folder contains general properties of the user who submitted the flag. This is a folder of the Flag folder.

Parameter Name	Type	Description
Flag Submitter Name	string	The name of the user who submitted the flag.
Flagger PBX ID	string	The PBX ID of the user who submitted the flag.
Flagger Email	string	The email address of the user who submitted the flag.
Flagger NT Login	string	The NT login of the user who submitted the flag.

FLAG: Evaluators Visibility folder

The FLAG: Evaluators Visibility folder filters the results based on the visibility of the evaluator who submitted the flag. This is a folder of the Flag folder.

Parameter Name	Type	Description
Evaluated by me	filter	Filters results based on forms evaluated by me.
My direct evaluators	filter	Filters results based on forms evaluated by me or by evaluators in my organization/groups/subgroups.
All my evaluators	filter	Filters results based on forms evaluated by me, by evaluators in my organization/groups/subgroups or by evaluators in any organizations/groups above mine.

INTERACTION: Filter By My CCDs folder

The INTERACTION: Filter By My CCDs folder filters the results based on the conditional custom data of the interaction.

Parameter Name	Type	Description
CONTACT: Filter by My CCDs 1, 6, 11	Filter	Filter the results based on the conditional custom data (1, 6, 11).
CONTACT: Filter by My CCDs 2, 7,12	Filter	Filter the results based on the conditional custom data (2, 7,12).
CONTACT: Filter by My CCDs 3, 8,13	Filter	Filter the results based on the conditional custom data (3, 8,13).
CONTACT: Filter by My CCDs 4, 9,14	Filter	Filter the results based on the conditional custom data (4, 9,14).
CONTACT: Filter by My CCDs 5, 10, 15	Filter	Filter the results based on the conditional custom data (5, 10, 15).
CONTACT: Filter by My CCDs 1-15	Filter	Filter the results based on the conditional custom data (1-15).

EVAL: Evaluators Visibility folder

The EVAL: Evaluators Visibility folder filters the results based on the visibility of the evaluator.

Parameter Name	Type	Description
Evaluated by Me	filter	Filters results based on forms evaluated by me for evaluations.
My Direct Evaluators	filter	Filters results based on forms evaluated by me or by evaluators in my organization/groups for evaluations.

Parameter Name	Type	Description
All My Evaluators	filter	Filters results based on forms evaluated by me, by evaluators in my organization/groups/subgroups or by evaluators in any organizations/groups above mine

Identity Authentication and Fraud Detection model

Identity Authentication and Fraud Detection (IAFD) uses voice biometric analysis to assist with customer verification, employee verification, and target (fraudster) detection. The solution analyzes real-time interactions and historical interactions already recorded. To create reports that show the results of activity performed by the solution, use the entities and fields described in this chapter.

An IAFD license is required to use the Biometrics model.


Topics

Biometrics Report model description	129
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Biometrics Report model description

Query entities have associated fields and related entities.

Data types

#	Number/Identifier
a	Attribute
	Date




Available entities

- [Biometrics Enrollment](#), page 129
- [Biometrics CD](#), page 131
- [Enrolled State](#), page 131
- [Training State](#), page 131
- [Biometrics Authentication](#), page 132
- [Biometrics Fraud](#), page 134
- [Biometrics Rate](#), page 135
- [Time By Hour](#), page 137

Biometrics Enrollment

The Biometrics Enrollment view contains persons and their Identity Authentication and Fraud Detection enrollment state. Also included is the associated audio segments used to train the voiceprint model for the person.

Parameter Name	Data Type	Description
Person ID	#	Unique numeric identifier for the person.
Person Name	a	Name of the person enrolled.
Person Type	a	Type of person enrolled. Employee Customer Target
Contact Key	#	Unique identifier of the contact used for enrollment.

Parameter Name	Data Type	Description
Direction	#	Call direction of the contact. 0 = Unknown 1 = Inbound 2 = Outbound 3 = Internal
System Start Time		Contact start time, in UTC format.
System End Time		Contact end time, in UTC format.
Audio Start Time		Date and time the detection occurred, in UTC format.
Assignment State	#	Assignment state of each audio segment used in voiceprint model training for this person. 0 = Pending Approval, not currently used in voiceprint 1 = Approved, not currently used in voiceprint 2 = Approved, currently used in voiceprint 3 = Pending Approval, currently used in voiceprint 4 = POI replay reference audio, not used in voiceprint 5 = Candidate enrollment mixed mono audio segment
Voiceprint ID	#	Set to 0 if the person does not currently have a valid voiceprint model.
CCD1 to CCD15	a	Conditional Custom Data fields.
SCD1 to SCD75	a	Custom Data fields.

One to many relationships

- There is one row of Biometrics Enrollment for each audio segment used in the voiceprint model training for the person.
 - There is one row of Training State for each row of the voiceprint audio segment for the person.
- There is one row of Biometrics Enrollment for each biometrics custom attribute (Biometrics CD) for the person.

One to one relationships

There is one row of Enrolled State for each row in:

- [Biometrics Enrollment](#), page 129

Biometrics CD

The Biometrics CD view contains biometrics custom data associated with a person detected/authenticated by the Identity Authentication and Fraud Detection system. A biometrics person can have zero or more biometrics custom data fields associated with them.

Parameter Name	Data Type	Description
Field Name	a	Biometrics custom data field name.
Field Value	a	Biometrics custom data field value.

Many to one relationships

There are many rows of Biometrics CD to one row of:

- [Biometrics Enrollment](#), page 129
- [Biometrics Authentication](#), page 132
- [Biometrics Fraud](#), page 134

Enrolled State

The Enrolled State view contains persons and their Identity Authentication and Fraud Detection enrollment state.

Parameter Name	Data Type	Description
State	a	State of biometrics person enrollment. Manual Enrollment Auto Enrollment Pending Auto Enrollment Opted Out of Enrollment

One to one relationships

There is one row of Enrolled State for each row in:

- [Biometrics Enrollment](#), page 129
- [Biometrics Authentication](#), page 132

Training State

The Training State view contains the state of each individual audio segment used for training an Identity Authentication and Fraud Detection voiceprint for a person.

Parameter Name	Data Type	Description
State	a	The state of each audio segment used to train a voiceprint model for a person. Not Trained Training in progress Trained Training Invalidated Training failed due to License Training failed due to invalid file Training failed due to low net speech Training rejected due to detection of target in audio Training failed due to out of licenses Training mixed mono failed, no voiceprint for employee Training failed, poor quality audio

Many to one relationships




There are many rows of Training State to one row of:

- [Biometrics Enrollment](#), page 129

Biometrics Authentication

The Biometrics Authentication view contains authentications for each person being verified using Identity Authentication and Fraud Detection.

Parameter Name	Data Type	Description
Person ID	#	Unique numeric identified for the person.
Person Name	a	Name of the person being authenticated.
Person Type	a	Type of person enrolled. Employee Customer Target

Parameter Name	Data Type	Description
Detection Result	#	Biometrics authentication detection result. 1 = Detection found 2 = Detection not found 3 = Call has no attributes for authentication 4 = Agnitio license expired 5 = Low net speech 6 = Low signal to noise 7 = High saturation 8 = No voiceprint for verification of this person
Detection Type	#	Biometrics authentication detection type. 1 = Employee 2 = Customer 3 = Target
Detection Score	#	Biometrics confidence score of the authentication. 0.1–15
Analysis Date		Date and time the detection occurred, in UTC format.
Contact Key	#	Unique identifier of the contact that authentication occurred on.
Direction	#	Call direction of the contact. 0 = Unknown 1 = Inbound 2 = Outbound 3 = Internal
System Start Time		Contact start time, in UTC format.
System End Time		Contact end time, in UTC format.
User Name	a	Name of the agent on the call.
CCD1 to CCD15	a	Conditional custom data fields.
SCD1 to SCD75	a	Custom data fields.

One to many relationships

There is one row of Biometrics Authentication for each of the persons:

- [Biometrics CD](#), page 131 (biometrics custom attributes)


One to one relationships



There is one row of Biometrics Authentication for each row in:

- [Enrolled State](#), page 131

Biometrics Fraud

The Biometrics Fraud view contains detections of Identity Authentication and Fraud Detection targets.

Parameter Name	Data Type	Description
Person ID	#	Unique numeric identifier for the person.
Person Name	a	Name of the target person that was detected.
Detection Result	#	Biometrics fraud detection result. 1 = Detection found 2 = Detection not found 4 = Agnitio license expired 5 = Low net speech 6 = Low signal to noise 7 = High saturation
Detection Type	#	Biometrics authentication detection type. 1 = Employee 2 = Customer 3 = Target
Group Name	a	Name of the watch list group the detected target belongs to.
Detection Score	#	Biometrics confidence score for the detection. 0.1–15
Analysis Date		Date and time the detection occurred, in UTC format.
Provider Number	#	Audio source provider for the biometrics detection. -1 = Recording Selection Rule <CampaignID> = Biometrics detection occurred based on a configured campaign
Contact Key	#	Unique identifier of the contact that fraud detection occurred on.

Parameter Name	Data Type	Description
Direction	#	Call direction of the contact. 0 = Unknown 1 = Inbound 2 = Outbound 3 = Internal
System Start Time		Contact start time, in UTC format.
System End Time		Contact end time, in UTC format.
ANI	a	Automatic Number Identification associated with the contact that this fraud detection occurred on.
User Name	a	Name of the agent on the call.
CCD1 to CCD15	a	Conditional custom data fields.
SCD1 to SCD75	a	Custom data fields.

One to many relationships

There is one row of Biometrics Fraud for each of the persons:

- [Biometrics CD](#), page 131 (biometrics custom attributes)

Biometrics Rate

The Biometrics Rate view contains Identity Authentication and Fraud Detection enrollment state and detection totals over time. This view can be used to view the rate/trend of Identity Authentication and Fraud Detection enrollment and detections.

Parameter Name	Data Type	Description
Time by Hour Key	#	Unique time by hour key used to join or order the Biometrics Rate view with the Time By Hour view. Format: YYYYMMDDHH
Employees Trained	#	Total number of employees successfully enrolled and trained by the specified hour.

Parameter Name	Data Type	Description
Customers Trained	#	Total number of customers successfully enrolled and trained by the specified hour.
Targets Trained	#	Total number of targets successfully enrolled and trained by the specified hour.
Employee Opt Outs	#	Total number of employees that opted out of enrollment by the specified hour.
Customer Opt Outs	#	Total number of customers that opted out of enrollment by the specified hour.
Customer Auth Success	#	Total number of successful customer authentications that have occurred by the specified hour.
Employee Auth Success	#	Total number of successful employee authentications that have occurred by the specified hour.
Customer Auth Failures No Detection	#	Total number of customer authentication failures that have occurred by the specified hour due to the person not being detected.
Employee Auth Failures No Detection	#	Total number of employee authentication failures that have occurred by the specified hour due to the person not being detected.
Customer Auth Failures No Attributes	#	Total number of customer authentication failures that have occurred by the specified hour due to no attributes associated with a call.
Employee Auth Failures No Attributes	#	Total number of employee authentication failures that have occurred by the specified hour due to no attributes associated with a call.
Customer Auth Failures License Expired	#	Total number of customer authentication failures that have occurred by the specified hour due to an expired license.
Employee Auth Failures License Expired	#	Total number of employee authentication failures that have occurred by the specified hour due to an expired license.

Parameter Name	Data Type	Description
Customer Auth Failures Low Net Speech	#	Total number of customer authentication failures that have occurred by the specified hour due to low net speech on a call.
Employee Auth Failures Low Net Speech	#	Total number of employee authentication failures that have occurred by the specified hour due to low net speech on a call.
Customer Auth Failures Low SN	#	Total number of customer authentication failures that have occurred by the specified hour due to low signal to noise on a call.
Employee Auth Failures Low SN	#	Total number of employee authentication failures that have occurred by the specified hour due to low signal to noise on a call.
Customer Auth Failures High Saturation	#	Total number of customer authentication failures that have occurred by the specified hour due to high saturation on a call.
Employee Auth Failures High Saturation	#	Total number of employee authentication failures that have occurred by the specified hour due to high saturation on a call.
Customer Auth Failures No Voiceprint	#	Total number of customer authentication failures that have occurred by the specified hour due to a customer not having a trained voiceprint.
Employee Auth Failures No Voiceprint	#	Total number of employee authentication failures that have occurred by the specified hour due to an employee not having a trained voiceprint.


One to one relationships

There is one row of Biometrics Rate for each row in:

- [Time By Hour](#), page 137

Time By Hour

The Time By Hour view allows you to aggregate the Biometrics Rate view for various time periods such as hour, date, and month.

Parameter Name	Data Type	Description
Time By Hour Key	#	Unique time by hour key used to join or order the Biometrics Rate view with the Time By Hour view.
The Hour	#	Hour of the day.
The Day of Week	#	Day of the week, from 1 through 7. The default first day of the week is Sunday.
The Day of Month	#	Day of the month.
The Day of Year	#	Day of the year.
The Week of Month	#	Week of the month.
The Week of Year	#	Week of the year.
The Month	#	Month.
The Quarter	#	Quarter.
The Year	#	Year.
Is Weekend	#	True = Weekend day False = Week day
The Datetime		Full date and time.

One to many relationships

There is one row of Time By Hour for each row in:

- [Biometrics Rate](#), page 135

Best practices

Best practices provide useful tips for Ad Hoc Reporting.

Topics

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Evaluation reports by group filters

In evaluations queries, you can apply a filter for a specific group/organization to obtain accurate results and prevent inclusion of duplicated results in the Evaluation model.

Reports retrieve evaluations from the full group/organization hierarchy. Therefore each query in the Evaluation model can potentially retrieve more than a single result for evaluation or form components.

To avoid double counting in the Evaluations model, always filter on a group/organization in evaluations queries. You can use the root group to ensure that there is no loss of data.

Fields from a single entity in the Contacts model

Within the Contacts model, select fields from a single entity for your query. Mixing entities in a Contacts model query creates a combined record for every possible combination of a record from the Contact folder with a record from the Interaction folder.

If you need to combine entities in your query, do not select fields from both the Contact and Interactions entities. The Interactions entity includes fields that relate to contact elements in conjunction with interaction elements.

Selecting query fields from both the Contacts and Interaction entities within the Contacts model can lead to:

- System timeout
- Major increases in processing time (to 100% CPU usage)

Query processing performance

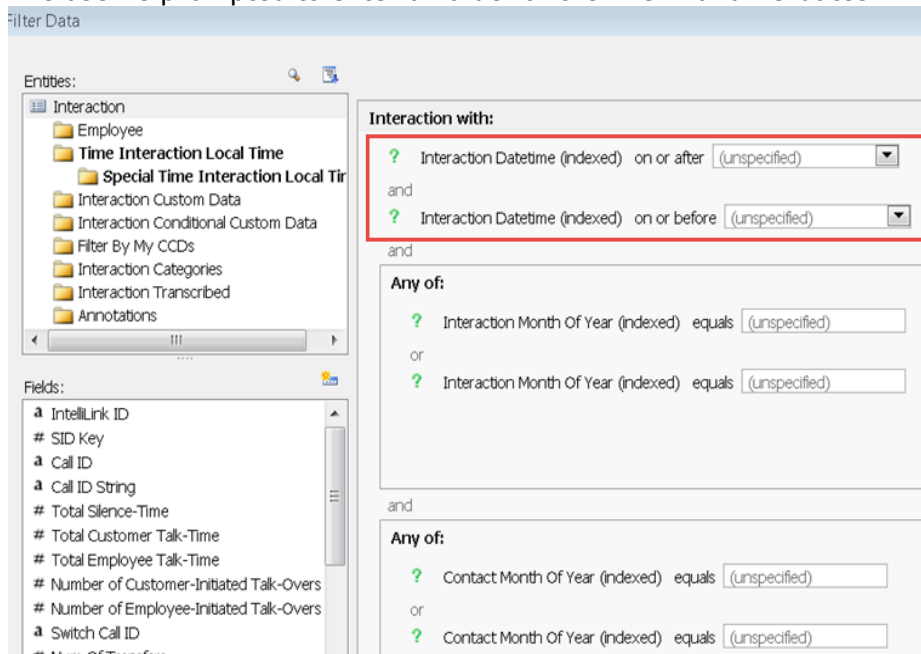
The Ad Hoc report processing time is limited to 30 seconds. A query that runs longer than 30 seconds can cause a report timeout.

To optimize query processing, always include the **Month_of_Year** field in your filters, otherwise you will experience timeout. For example:

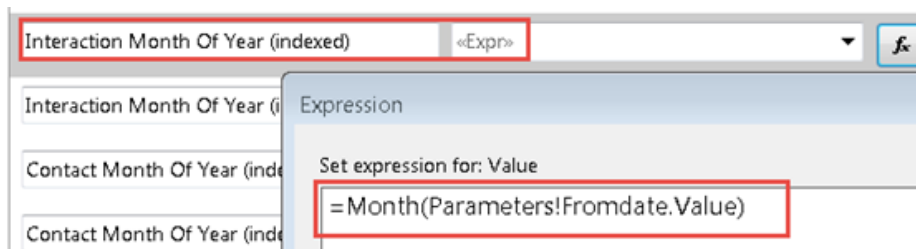
- If your report covers a time range that is within the month of October, add **Month_of_Year = 10** to your report filter
- If your report covers a time range that is between Sept 28 - Oct 3, add **Month_of_Year = 9** or **10** to your report filter

Use an expression when defining the **Month_of_Year** filters, so that the values for these filters are derived from the **From** and **To** dates that the user enters when running a report. The expressions must use the **Month** function:

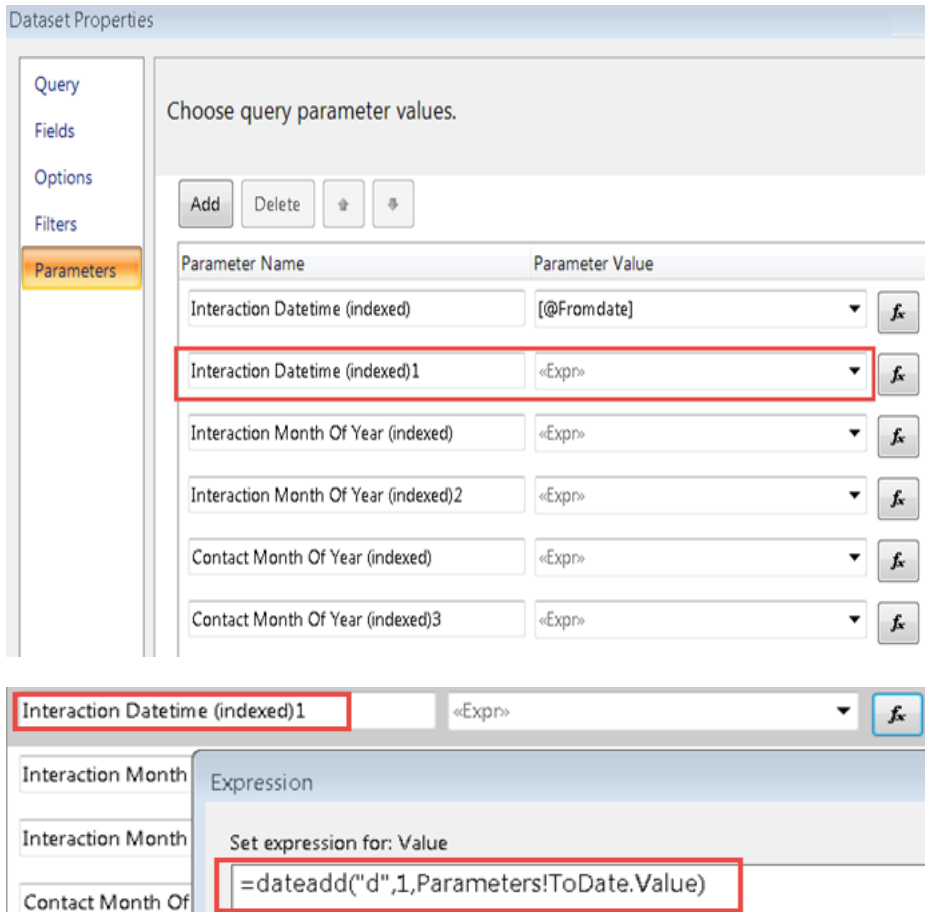
- The user is prompted to enter a value for the **From** and **To** dates:



- The **Month_of_Year** filter value is derived from the From and To dates the user enters, according to the expression:



- **Note:** to include the last day of the date range entered in your query, add one day to the **To** date parameter:



Do also one or more of the following to optimize your query processing:

- Use the built-in filter objects and indexed fields.
- Ensure that the query retrieves only the relevant data.
- Select objects from a single Model.
- Add more relevant filters to improve database performance.

Related topics

[Produce a report from the last x days](#), page 144

Produce a report from the last x days

You can manually edit SSRS filters to create ad hoc reports that include data from the last X days. For example, you can create a report that includes data from the last 7 days.

Procedure

- 1** Access the Microsoft SQL Server Report Builder and from the **Datasets**, select the relevant Dataset you want to edit.
- 2** Click **Edit** and then click **Query Designer**.
- 3** Click **Filter**.
- 4** Select any date field and drag it *twice* to the right pane. For example:
 - a. For an evaluations report, select **Evaluation Datetime** (under **Evaluations>Time Evaluation Local Time**).
 - b. For an interactions report, select **Interaction Datetime** (under **Contacts>Interaction>Time Interaction Local Time**).
- 5** In the first field occurrence:
 - a. Right click the condition and select **On or After**.
 - b. Right click the field, select **Edit As Formula** and set the following formula:
DateTime >= DATEADD(day,-7,TODAY())
- 6** In the second field occurrence:
 - a. Right click the condition and select **On or Before**.
 - b. Right click the field, select **Edit As Formula** and set the following formula:
DateTime <= TODAY()
- 7** Click **OK** and save the report.

Defining the first day of the work week

How the first day of the week (Sunday or Monday) is defined for your system can affect report results. Check the database to verify how the first day of the week is defined in the system.

Example:

When you create a report that displays the number of interactions per week of year. The report produces the following results:

Interaction Count	Interaction Week of Year
153	20
176	21
61	22
15	23
360	33

The report results are different for a location that defines Sunday as the first day of the week and for a location that defines Monday as first day of week.

To verify how the **First day of week** is defined for your database:

In the SQL Server Management Studio, for the **Datawarehouse** database, select @@datefirst.

To change the **first day of Week**, from the SQL Server Management Studio, run the following two commands on the Data Warehouse:

- `set datefirst 1`
- `exec job_fill_time_by_hour`

The following table displays how the first day of the week is defined for each language.

langid	alias	name	datefirst	lcid
0	English	us_english	7	1033
1	German	Deutsch	1	1031
2	French	Français	1	1036
3	Japanese	日本語	7	1041
4	Danish	Dansk	1	1030
5	Spanish	Español	1	3082
6	Italian	Italiano	1	1040
7	Dutch	Nederlands	1	1043
8	Norwegian	Norsk	1	2068
9	Portuguese	Português	7	2070
10	Finnish	Suomi	1	1035
11	Swedish	Svenska	1	1053
12	Czech	čeština	1	1029
13	Hungarian	magyar	1	1038
14	Polish	polski	1	1045
15	Romanian	română	1	1048
16	Croatian	hrvatski	1	1050
17	Slovak	slovenčina	1	1051
18	Slovenian	slovenski	1	1060
19	Greek	ελληνικά	1	1032
20	Bulgarian	български	1	1026
21	Russian	русский	1	1049
22	Turkish	Türkçe	1	1055
23	British English	British	1	2057
24	Estonian	eesti	1	1061
25	Latvian	latviešu	1	1062
26	Lithuanian	lietuvių	1	1063
27	Brazilian	Português (Brasil)	7	1046
28	Traditional Chinese	繁體中文	7	1028
29	Korean	한국어	7	1042
30	Simplified Chinese	简体中文	7	2052
31	Arabic	Arabic	1	1025
32	Thai	ไทย	7	1054

The following table maps the value for the first day of the week.

Value	First day of the week is
1	Monday
2	Tuesday
3	Wednesday
4	Thursday
5	Friday
6	Saturday
7 (default, U.S. English)	Sunday

Interactions ad hoc and custom reports re-creation

In the current version all Interactions and Analytics reports are based on the SSRS platform, and no longer based on the BusinessObjects (BO) platform. As a result, reports that exist in earlier versions (prior to V15.1) must be re-created in SSRS in the current version. This procedure applies to both ad hoc and custom reports.

The reports re-creation can be done *before* or *after* the system migration:

In both cases, after system migration, the customer must deploy the reports in the WFO Reports application and assign them to the relevant roles.

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Search for BO reports

To assess which reports from earlier versions of your system may need to be re-created in SSRS (if they are still relevant), perform a search on the report server to find all BO reports that exist in your system.

The search can be performed using the Central Management Console application or the Query Builder admin tool. Each tool returns different information in the search results.

Related topics

[Search for BO reports using Central Management Console](#), page 149

[Search for BO reports using Query Builder](#), page 149

Search for BO reports using Central Management Console

You can use the Central Management Console (CMC) to search for BO reports on the report server. The CMC search results include:

- Report name
- Report location
- Number of instances
- Last date modified

Procedure

- 1** Go to **http://reports_server_address:6405/CmcApp**.
- 2** Log on as user **Administrator** and leave the password blank.
- 3** Click **Organize > Folders**.
- 4** In the tree, click **Objects List**.
- 5** Click the **Type** column filter and select **Web Intelligence Report**.
- 6** Click **OK**.
- 7** To refine your search results, enter a query in the **Search** field.

Search for BO reports using Query Builder

You can use the Query Builder admin tool to search for BO reports on the report server. The Query Builder search results include:

- Report name (SI_NAME)
- BO report ID (SI_ID)
- Name of the user that created the report (SI_OWNER)

Procedure

- 1** Copy the **AdminTools** folder from:
%impact360software\dir%Business Objects\BusinessObjects Enterprise
12.0\warfiles\WebApps
to:
%impact360software\dir% Tomcat\webapps.
- 2** Go to **http://reports_server_address:8080/AdminTools**.
- 3** Copy and paste the following query into the text area:
SELECT SI_ID, SI_NAME, SI_OWNER
FROM CI_INFOOBJECTS
WHERE SI_KIND = 'WEBI' and SI_INSTANCE = 0
- 4** Click **Submit Query**.

Re-create reports before system migration

Re-creating ad hoc and custom reports before the system migration, ensures that the reports are ready for operational use when the system is deployed. In addition, the customer can verify the accuracy of the newly created reports by comparing their results to the BO ad hoc reports. This method is suitable for the hardware replacement and hardware reuse upgrade scenarios. *After system migration*, the customer must deploy the reports in the WFO Reports application and assign them to the relevant roles.

Before you begin

Install SSRS at the customer site on a stand-alone server as described in *SQL Server Installation and Upgrade Guide*.

Procedure

1 [Import models](#), page 151

To re-create your reports in SSRS before system migration, upload the Interactions and Analytics models into SSRS. The models are Contacts, Assessments, and Evaluations.

2 [Re-create a report](#), page 153

Create your existing BO Ad Hoc and custom reports in SSRS. Once the reports are created, they are saved on the network.

3 [Create corresponding prompts](#), page 157

For each built-in prompt that exists in a BO Ad Hoc report, create a corresponding prompt in your re-created SSRS Ad Hoc report.

Related topics

[Deploy and assign reports](#), page 159

Related information

Install and Configure SSRS (*SQL Server Installation and Upgrade Guide*)

Import models

To re-create your reports in SSRS before system migration, upload the Interactions and Analytics models into SSRS. The models are Contacts, Assessments, and Evaluations.

Before you begin

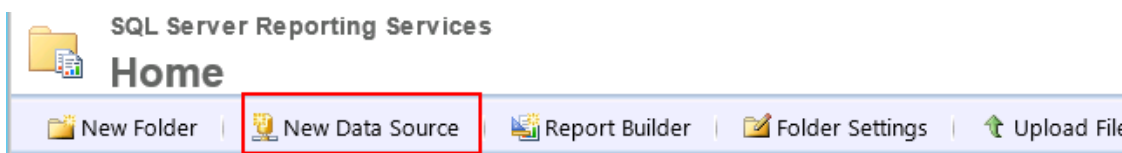
- Find out the credentials of the Data Warehouse database currently installed at your site.
- Download and extract the following models file:
 - **InteractionModelsSSO.zip**: if your current system is configured with Single Sign On (SSO).

- **InteractionModels.zip:** if your current system is not configured with Single Sign On (SSO).

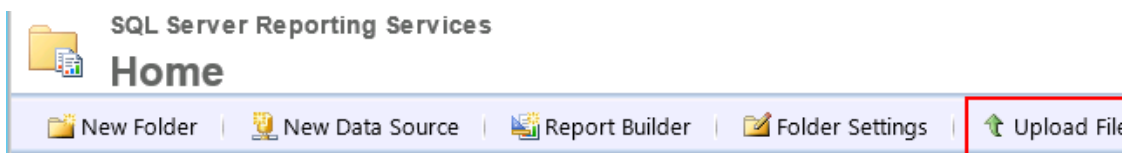
Obtain the files from the portal or from your customer representative.

Procedure

- 1 Go to the server hosting the SSRS, and access the **Reporting Services Configuration Manager** application.
- 2 Select **Reports Manager URL**.
- 3 Click the **URLs** link.
Verify that the link opens in Internet Explorer.
- 4 Click **New Data Source**.



- 5 In the **New Data Source** window, type the following:
 - a. Name: **CentralDWH**
 - b. Data Source Type: **Microsoft SQL Server**
 - c. Connection String: **Data Source=<server name>;Initial Catalog=CentralDWH**
Where the **<Server Name>** is the name of the server hosting your current system Data Warehouse database.
 - d. Under **Connect using**, select the relevant option to connect to your Data Warehouse database. Type the relevant credentials (if required).
 - e. Click **Test Connection**, and verify that connection is successful. Click **OK**.
A **CentralDWH** datasource is created and pointing to your Data Warehouse database.
- 6 To import the three models in SSRS:
 - a. Create a new path **WFO>Models>en_US** to import the models, as follows:
 - Click **New Folder** and enter **WFO** and click **OK**.
 - Double click the **WFO**, click **New Folder** and enter **Models**.
 - Double click the **Models** folder, click **New Folder** and enter **en_US**.
 - b. Access the **en_US** folder, and click **Upload File**.



- c. Click **Browse** and locate the files you extracted.
- d. Select the **Assessments** Report Model Definition File (smdl file) and click **OK**.
- e. Click the **Assessments** model.
- f. Select **Data Sources**.
- g. Click **Browse** and select the **CentralDWH** datasource.
- h. Click **OK** and **Apply**.
- i. Click **Home** and repeat Step c through Step f for the **Contacts** and **Evaluations** models.

Re-create a report

For Ad Hoc reports recreation, access the Report Builder and create your existing BO Ad Hoc reports in SSRS. Once the reports are created, they are saved on the network.

For custom reports recreation, see *Workforce Optimization Report Deployment Kit (RDK)*.

Procedure

- 1 Go to the server hosting the SSRS you installed at the customer site, and access the **Reporting Services Configuration Manager** application.
- 2 Select **Reports Manager URL**.
- 3 Click the **URLs** link.
Verify that the link opens in Internet Explorer.
- 4 Click **Report Builder**.
- 5 From the Report Builder left pane, right-click **Data Sources**, and click **Add Data Source**.
- 6 Select the relevant Model to use for creating your report, and click **OK**.
- 7 Right-click **DataSets**, and click **Add Datasets**.
- 8 Select **Use a dataset embedded in my report**.
- 9 From **Data source** list, select the Data Source you created. Click **Query Designer**.
- 10 Continue creating your Ad Hoc report as described in *Create a Report* .



If no data is displayed in your report, access Windows **Computer Management** application. Using this application, add a user that exists in your current BO application and that has visibility to the data you are trying to access.

Related topics

[Create a report](#), page 13

Related information

Workforce Optimization Report Deployment Kit (RDK)

Re-create report after system migration

Re-creating the custom and ad hoc reports directly in the current system (after migration), does not require the customer to install SSRS separately before system migration. With this method, the reports are not ready for operational usage when the current system is deployed.

This method is suitable for the hardware replacement scenarios only.



This method is *not* suitable for hardware reuse upgrade scenario. In this scenario, the BO reports are deleted during the upgrade procedure. The reports are therefore *not* available after the upgrade procedure and cannot be used as a reference for re-creating the SSRS reports.

After reports re-creation, the customer must deploy the reports in the WFO Reports application and assign them to the relevant roles.

Procedure

1 [Create a report](#), page 13

For Ad Hoc reports recreation, access the system and create your existing BO Ad Hoc reports in SSRS. Once the reports are created, they are saved on the network.

For custom reports recreation, see *Workforce Optimization Report Deployment Kit (RDK)*.

2 [Create corresponding prompts](#), page 157

For each built-in prompt that exists in a BO Ad Hoc report, create a corresponding prompt in your re-created SSRS Ad Hoc report.

3 [Deploy and assign reports](#), page 159

Deploy the re-created reports in the WFO Reports application. Once the reports are deployed they are managed in the same way as the system predefined reports, for example, they can be scheduled. After deploying the reports, assign them to the relevant roles.

Related information

Workforce Optimization Report Deployment Kit (RDK)

BO prompts creation

BO Ad Hoc reporting provides built-in prompts used when building a report. Prompts are used in reports to ask the user for more information to filter the data presented in the report. For example, a date range prompt.

SSRS Ad Hoc Reports do not provide built-in prompts. All prompts are manually created for each report.

If your previous version's Ad Hoc reports include one or more of the built-in BO prompts, create corresponding prompts for your SSRS reports.

Related topics

[Prompt mappings](#), page 155

[Create corresponding prompts](#), page 157

Prompt mappings

The table maps the BO built-in prompts to the corresponding prompts to create in SSRS.

BO built-in prompts	SSRS Entity	SSRS folder	SSRS field (prompt)	SSRS condition
Assessments Model				
Assessments universe: Prompt for Assessment Datetime Range	Assessments Form Scores	Time Assessment Local Time	The Datetime (indexed)	On or After
				On or Before
Assessments universe: Prompt for Contact Datetime Range	Assessments Form Scores	Contact > Time Contact Local Time	Contact The Datetime (indexed)	On or Before
				On or After
Contacts Model				

BO built-in prompts	SSRS Entity	SSRS folder	SSRS field (prompt)	SSRS condition
Contacts universe: Prompt for Contact Datetime Range	Contact	N/A	Contact Month of Year (indexed)	In a List
	Contact	N/A	Session Month of Year (indexed)	In a List
	Contact	Time Contact Local Time	Contact Datetime (indexed)	On or After On or Before
Contacts universe: Prompt for Transcribed Interaction Datetime Range	Interaction	Interaction Transcribed	Interaction Local Time (indexed)	On or After On or Before
Contacts universe: Prompt for Interaction Datetime Range	Interaction	Time Interaction Local Time > Special Time Interaction Local Time	Interaction Month of Year (indexed)	In a List
		Time Interaction Local Time > Special Time Interaction Local Time	Contact Month of Year (indexed)	In a List
		Time Interaction Local Time	Interaction Datetime (indexed)	On or After On or Before
Evaluations Model				

BO built-in prompts	SSRS Entity	SSRS folder	SSRS field (prompt)	SSRS condition
Evaluations universe: Prompt for Interaction Datetime Range	Evaluation Form scores	Interaction > Time Interaction Local Time	Interaction The Datetime (indexed)	On or After <hr/> On or Before
Evaluations universe: Prompt for Evaluation Datetime Range	Evaluation Form scores	Time Evaluation Local Time	Evaluation Datetime (indexed)	On or After <hr/> On or Before
Evaluations universe: Prompt for Group	Evaluation Form scores	N/A	Group (indexed)	In a List

Related topics

[Create corresponding prompts](#), page 157

[BO prompts creation](#), page 155

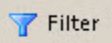
Create corresponding prompts

For each built-in prompt that exists in a BO Ad Hoc report, create a corresponding prompt in your re-created SSRS Ad Hoc report.

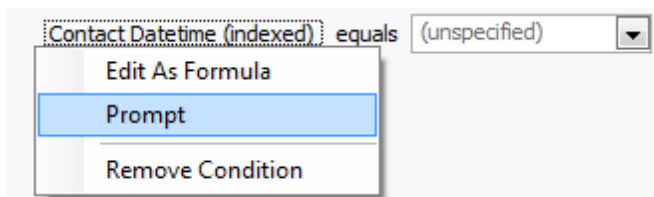
Before you begin

See table that maps the BO prompts to the corresponding SSRS prompts. [Prompt mappings](#), page 155.

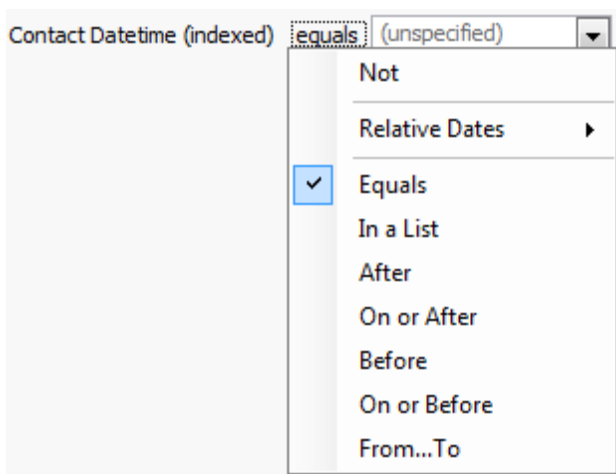
Procedure

- 1 During your report creation, access the relevant model for which you are creating a prompt: Assessments, Evaluations, or Contacts.
- 2 From the selected model, select the entity for which you are creating the prompt. See **SSRS Entity** column in *Prompt mappings* table.
- 3 Click  Filter .
- 4 From **Entities**, select the folder where the specific prompt is located. See **SSRS folder** column in *Prompt mappings* table.

- 5 From **Fields**, lists double-click the field you are creating as a prompt. See **SSRS field (prompt)** column in *Prompt mappings* table.
- 6 Place the cursor over the selected field and right-click it. Select **Prompt**.



- 7 Place the cursor over the **equals** link ([equals](#)) and select relevant condition. See **SSRS condition** column in *Prompt mappings* table.



- 8 Click **OK**.
- 9 In the **SQL Server Report Builder**, under the **Parameters** folder, right-click the parameter created. Select **Parameter Properties** and rename the parameter to a meaningful name.
- 10 Under the **Datasets** folder, right-click your Dataset, and select **Dataset Properties**. Under the **Parameters** tab, rename the values under the **Parameter Value** column with the same names as in Step 9.



Do not modify the values under the **Parameter Name** column.

Related topics

[BO prompts creation](#), page 155

Deploy and assign reports

Deploy the report into the Reports application in the WFO system to manage your report in the same way as the system predefined reports. For example, you can run or schedule a report. After deploying your report, assign it to the relevant roles.

Before you begin

Verify that the following files exist for the report you are deploying:

- Report .rdl file - contains the definition of your report
- Report Parameter xml file - contains the definition of your report parameters
- Report localization xml file - contains your report localization properties

Procedure

1 Select **Reports > Setup > Deployment**.

To deploy reports, you must be assigned the **Deploy Reports** privilege.

2 From **Reports Selection**, select the topic under which you want to deploy your report.

3 To select your report file, from **Report Filename**, click **Browse**.

This file has the **.rdl** file name extension.

4 To select your report parameter definition file, from **Report Prompt Filename**, click **Browse**.

This file is an XML file with the naming convention: **<reportName>_prompt.xml**.

5 To select your report localization properties file, from **Report Properties Filename** click **Browse**.

This file contains key/value pairs of the locale and the localized report name. This file is an XML file with the naming convention: **<reportName>_mlname.xml**.

6 Click **Deploy**.

7 Click **Access Rights** and select the roles to assign to your report.

The report is published and displayed under your selected topic.

Related information

Workforce Optimization Report Deployment Kit (RDK)

Main changes from previous versions

This table lists the changes between custom/Ad Hoc reports of previous versions and the current version, for systems upgrading to WFO V15.1 (or later).

Item	Previous Versions	Current Version (or later)
Scheduling reports	Scheduling of ad hoc reports is supported.	Scheduling of Ad hoc reports is not supported. Custom reports (that do not use the ad hoc reporting data model) can be scheduled.
Dynamic parameters	For custom reports, you can define a dynamic list of input parameters.	For custom reports, there is no option to dynamically populate values into an input parameters list. The values need to be explicitly coded in the XML file.

Interactions sample reports

Ad Hoc Reporting supplies a number of Interactions sample reports that demonstrate the available features. All sample report are located in the Reports application, under **Ad-Hoc Reporting Sample Reports**.

You can modify the sample reports using the Report Builder. Once you save the report, it is available to you and you are not required to deploy it into the system.

Topics

Sample reports list	162
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Sample reports list

The table lists the Interactions sample reports provided by the Ad Hoc Reporting.

Report name	Report description	Report parameters
Average Assessment Scores per Assessor	<p>Report shows the average assessments given by assessors. Using the results, you can see whether there are assessors who consistently give higher or lower scores than other assessors.</p> <p>The report displays a bar chart where the X-axis represents the assessors and the Y-axis represents the average assessment score.</p> <p>The report includes assessors who are directly assigned to your organization/groups and yourself.</p> <p>The report creates a distribution using the first Conditional Custom Data Field.</p>	<ul style="list-style-type: none"> ▪ Assessor: name of the assessor ▪ Assessment Time Frame: beginning and end dates for the assessment ▪ Contact Time Frame: beginning and end dates for the contact
Average Evaluation Scores per Employee	<p>Report shows the average evaluations scores given to employees, showing which employees excel and which employees are under-performing.</p> <p>The report displays bar chart, where the X-axis represents the employees and the Y-axis represents the average score.</p> <p>The report includes employees who are assigned to the organizations/groups over which you have scope.</p>	<ul style="list-style-type: none"> ▪ Interaction Time Frame: beginning and end dates for the interaction ▪ Evaluation Time Frame: beginning and end dates for the evaluation
Call distribution report	<p>Report shows how contacts are distributed across a specified time period.</p> <p>The report displays a bar chart where the X-axis represents the number of contacts and the Y-axis represents the date.</p>	<ul style="list-style-type: none"> ▪ Contact Time Frame: beginning and end dates for the contact

Report name	Report description	Report parameters
Employees who handled interactions with a minimum of X transfers	Report shows all employees that handled an interaction with a minimum of X transfers. The report displays a textual format.	<ul style="list-style-type: none"><li data-bbox="1133 268 1503 401">▪ Interaction Time Frame: beginning and end dates for an interaction<li data-bbox="1133 415 1503 554">▪ Number of Transfers: number of transfers that occurred during the interaction