Active Insights

Reports

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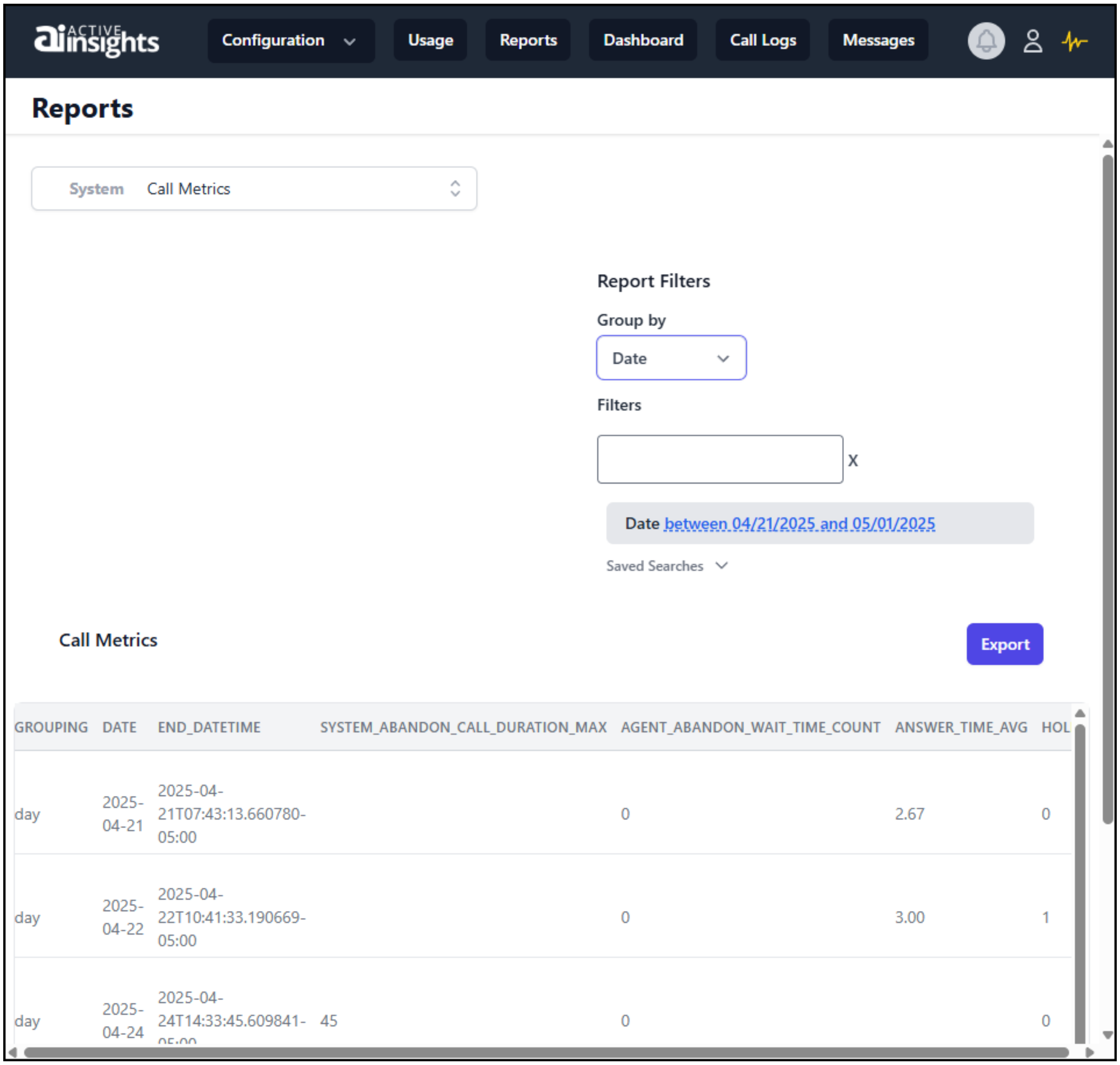
Active Insights Reports



The Reports page located in the Active Insights platform is used to filter, view, and export customizable reports on service statistics. Reports displayed on the Reports page can be configured to display statistics for different categories. Statistics can be further filtered and organized by select characteristics.

Accessing Reports

To access the Reports page, click the Reports button in the Active Insights title bar.

The Reports page is displayed.

By default, the reports page contains the Reports Type field with the “<none>” value selected.

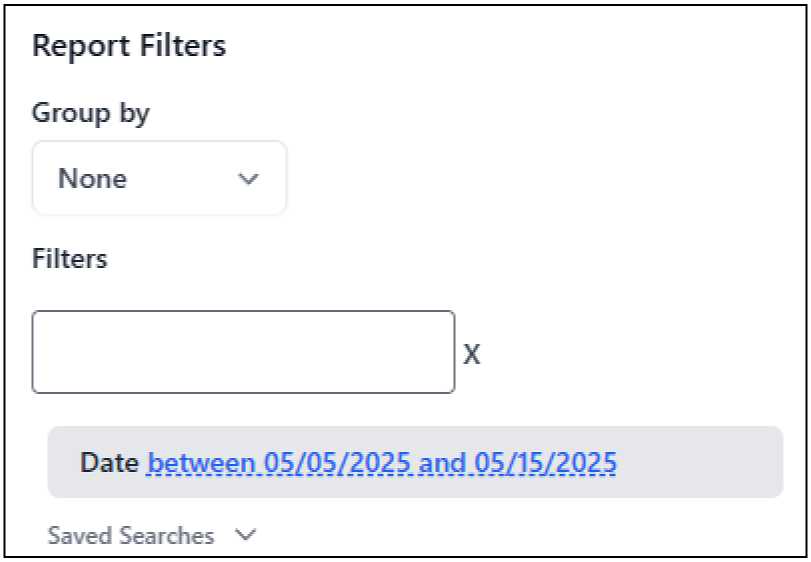
Once a report is selected, the Report Filters section is displayed and the statistics for the reports are displayed.

Report Filters

The Report Filters section is displayed if a report is selected, regardless of what report is selected. However, the options available for the Report Filters section may vary depending on the report selected.

To display the Report Filters section, select a report in the Reports field.

The Report Filters section and the statistics for the selected report are displayed.



The Report Filters section is used to determine how data displayed in the selected report is organized and what information is displayed. The Report Filters section contains the Group By field, the Filters field, and the Date filter. By default, the Date filter is set to display data for the current month.

Group by

The Group By setting is used to determine the category by which data is grouped on the Reports page.

Click the Group By setting and select the category by which you want the data grouped.

The Group By menu may contain the following settings:

None

If “None” is selected, the Reports page displays statistics organized by various general categories, depending on the type of report selected.

Agent

If “Agent” is selected, the Reports page displays statistics organized by the Login Names of the agents associated with the data.

Date

If “Date” is selected, the Reports page displays statistics for the selected report organized by the date on which the data originated.

Skill

If "Skill" is selected, the Reports page displays statistics for the selected report organized by the Automated Call Distribution (ACD) Skill from which the data originated.

Client

If "Client" is selected, the Reports page displays statistics for the selected report organized by the Client Number from which the data originated.

Filters

The Filters field is used to create search parameters by which the Reports are filtered. The dataset for which information is displayed in the Reports is determined by the filters created using the Filters field.

The Filters field includes a Saved Searches command.

By default, the Report Filters section contains a Date filter set to show data for the current month.

Note: The Date Filter cannot be removed, only changed.

To change the parameters of the Date filter, click the Filters field and select the Date parameter from the menu.
OR
Click the range hyperlink in the Date filter.

To add a filter, click the Filters field and select a parameter from the menu.

To remove a filter, click the Remove icon ✕ to the right of the filter.

More information on search parameters is provided in Appendix B: Filters.

Saved Searches

The Saved Searches pane is used to select and manage Saved Searches for the Report. More information on Saved Searches is provided in Appendix C: Saved Searches.

Reports

The type of data displayed on the Reports page is determined by the report selected in the Report Type field, and the way in which the data is displayed is determined by the option selected for the Group By field.

This document describes the layout of each report as displayed by each Group By option. The Reports page contains the following reports.

Report	Description
Agent Score	The Agent Score report is an agent report that displays statistics related to the Post-Call Scoring Script results.
Audit Log	The Audit Log report is a system report that displays activity related to Active Insights users.
Call Metrics	The Call Metric report is a system report that displays statistics for system service quality.
System Service Level	The System Service Level report is a system report that displays general system service data.
Client Usage	The Client Usage report is a system report that displays usage information organized by Client.

Running a Report

Reports can be viewed within the Active Insights platform by running the report using the Run button.

To run a report in Active Insights, select a report in the Reports menu.

The Run and Export buttons are displayed.

Click the Run button.

The contents of the selected report are displayed on the Reports page

Exporting a Report

Reports can be generated and exported by using the Export button.

To export a report, select a report in the Reports menu.

The Run and Export buttons are displayed.

Click the Export button.

The Active Insights platform begins generating the report as a Comma Separated Values (CSV) file. When Active Insights finishes generating the report, the file can be downloaded from the Downloads page.

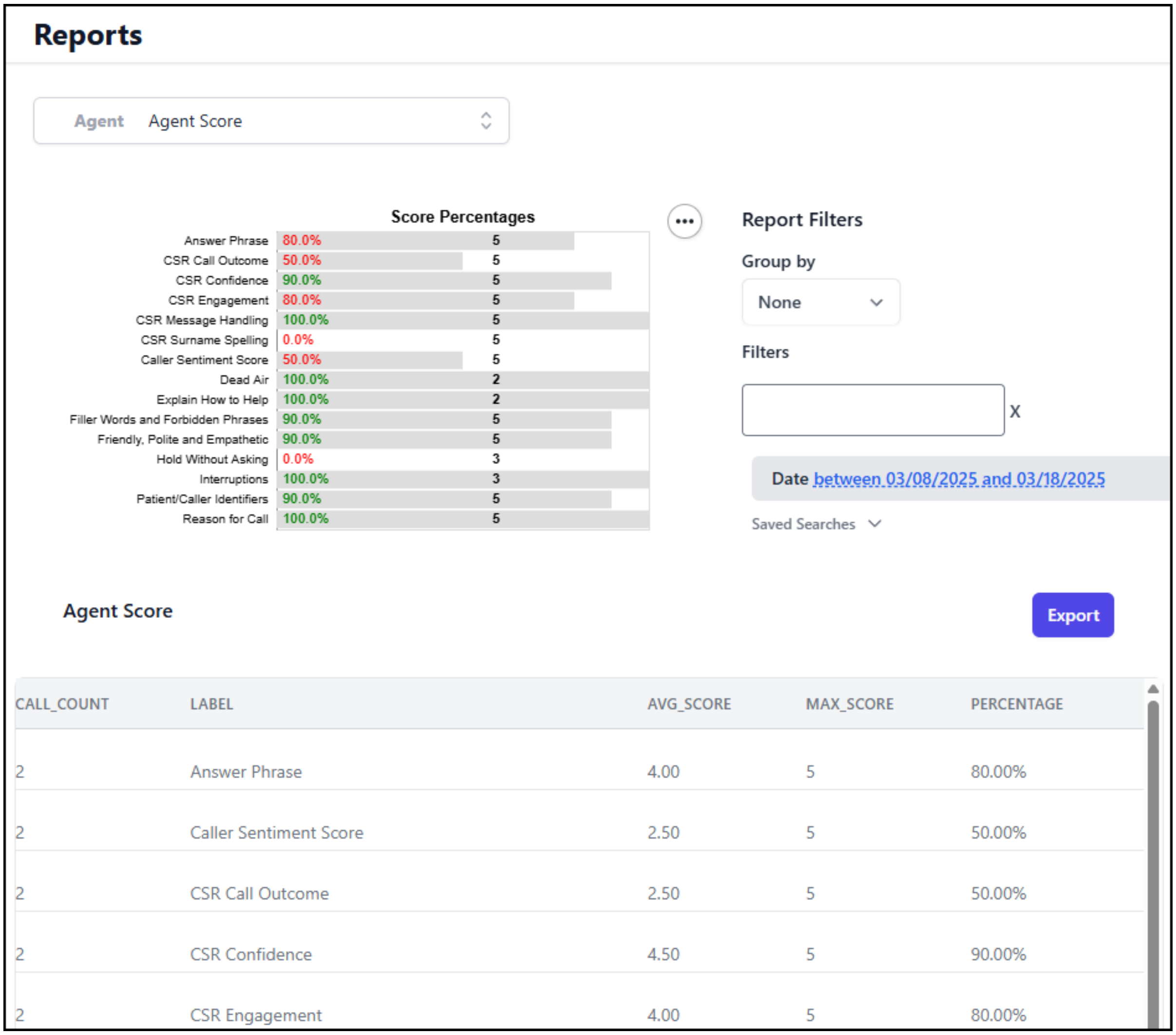
More information about using the Downloads page can be found in the *Active Insights User Guide.*

Agent Score

Agent Score report is an Agent report that displays statistics related to the Post-Call Scoring Script results.

The Group By setting for the Agent Score report may be set to “None” or “Agent” options.

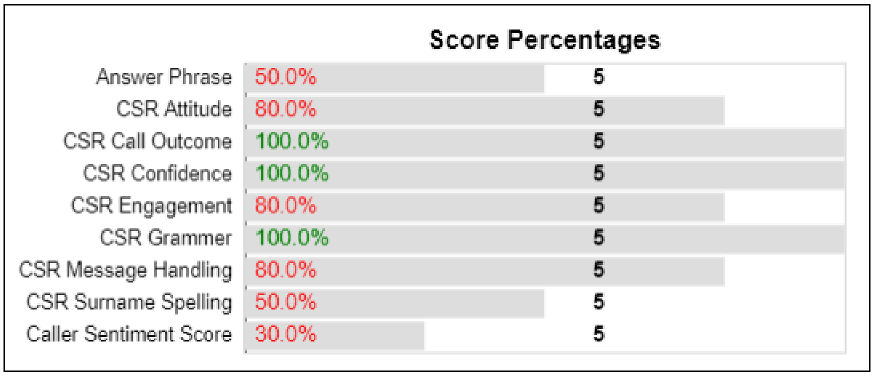
Agent Score Report (Grouped by None)



When the Group By field for the Agent Score report is set to “None,” the Reports page displays the Score Percentages chart and the Agent Scores Table.

Score Percentages

The Score Percentages bar chart displays the average score achieved for each Score Label for all agents or for a select agent compared to the maximum score possible for the Score Label.



Rows are displayed by the name of the Score Label. The Score Percentages chart displays a row for each Score Label represented in the chart. Each row contains the Average Score Percentage and the Maximum Possible Score.

Score Label

The Score Labels are displayed along the left side of each row.

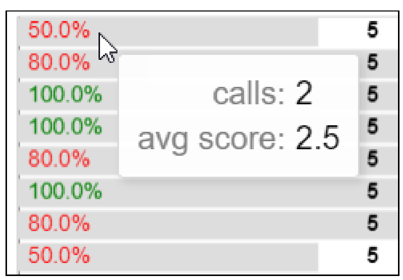
Average Score Percentage

The first column displays the average of scores assigned for each Score Label as a percentage of the maximum score possible.

The Average Score Percentage is also represented as the bar displayed across the chart. The bar extends further toward the right the larger the percentage that it represents.

A tooltip is provided for each bar displayed in the chart.

To display the tooltip for a bar, hover over the bar on the Score Percentages chart.



The tooltip displays the following information about the bar:

- The number of calls that received a score for the Score Label.
- The average score of the scores for the Score Label.

Maximum Possible Score

The second column displays the maximum possible score that can be achieved for the Score Label.

Agent Scores Table


Agent Scores

Agent Scores grouped by agent

Export

AVG_SCORE	CALL_COUNT	LABEL	MAX_SCORE	PERCENTAGE
2.63	8	Caller Sentiment Score	5	52.50%
1.88	8	CSR Surname Spelling	5	37.50%
10.00	3	Caller Satisfaction Level	10	100.00%
4.50	8	CSR Message Handling	5	90.00%
5.00	1	Live Answer Time	5	100.00%
4.13	8	CSR Call Outcome	5	82.50%
5.00	8	CSR Grammer	5	100.00%

The Agent Scores table displays a list of agent statistics related to scores assigned by Post-Call Scoring Scripts. Information presented by the Agent Scores table is displayed alphabetically by agent Login Name.

If the Group By field for the Agent Scores report is set to “None”, the Agent Scores table has the following columns.

Column	Description
Call_Count	The Call Count column displays the number of calls for which the agent received a score for the listed Score Label.
Label	The Label column displays the Score Label for which statistics are being presented in the row.
Avg_Score	The Average Score column displays the average of all scores that the agent received for the listed Score Label.
Max_Score	The Max Score column displays the maximum score that can be received for the listed Score Label.
Percentage	The Percentage column displays the percentage of the maximum score that the agent achieved for the listed Score Label, calculated by dividing the Average Score by the Maximum Score and multiplying by 100.

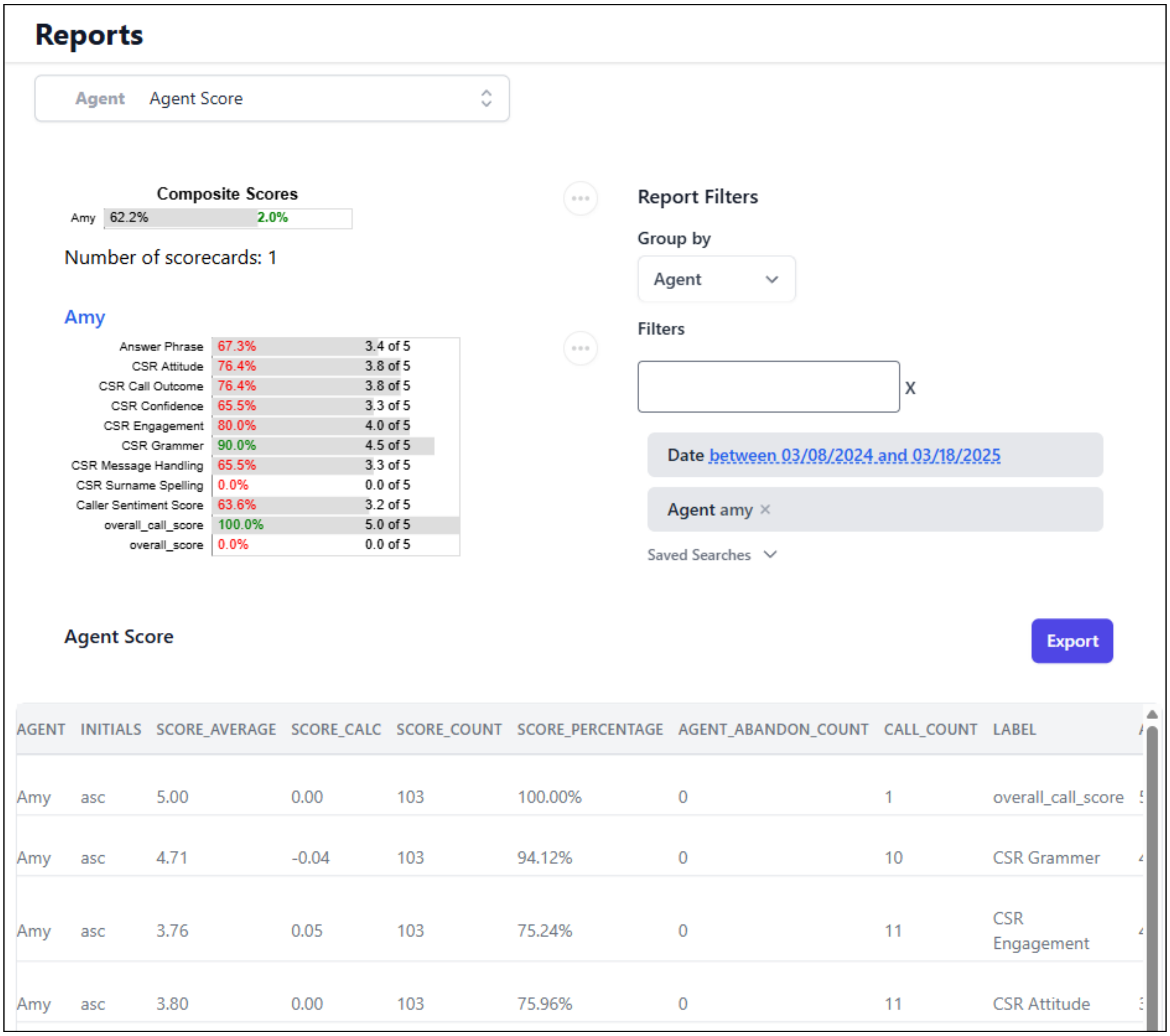
Exporting the Agent Scores Table

The Export button is used to export the data contained in the Agent Scores table as a Comma-Separated Values (CSV) file.

To Export the Agent Scores table data, click the Export button.

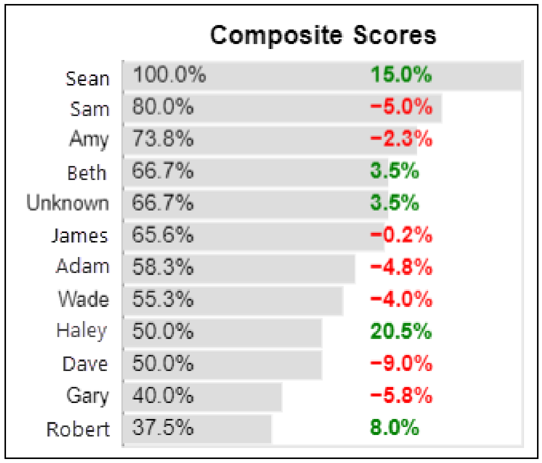
The CSV file for the data is generated and made available for download through the User Downloads page.

Agent Score Report (Grouped by Agent)



When the Group By field for the Agent Score report is set to “Agent,” the Reports page displays the Composite Scores bar chart, an Agent Scores bar chart for each agent, and the Agent Scores table.

Composite Scores



The Composite Scores bar chart displays the average of all scores given to the agent as a percentage of the maximum possible score. The chart compares the average agent score against a composite average score.

Rows are displayed in order of the Average Agent Percentage. Agents with higher Average Agent Percentage values are displayed higher on the list. The Composite Scores chart displays a row for each agent in the dataset. Each row contains the Average Agent Percentage and the Average Percentage Difference.

Agent

The agent Login Names are displayed along the left side of each row.

Average Agent Percentage

The first column displays the average of scores assigned to the agent for the dataset as a percentage of the maximum possible score. The Average Agent Percentage is also represented by the bar displayed across the chart. The bar extends further toward the right the larger the percentage is that it represents.

A tooltip is provided for each bar displayed in the chart.

To display the tooltip for a bar, hover over the bar on the Composite Scores chart.

The tooltip displays the number of calls that received a score for the Score Label for the agent.

Average Percentage Difference

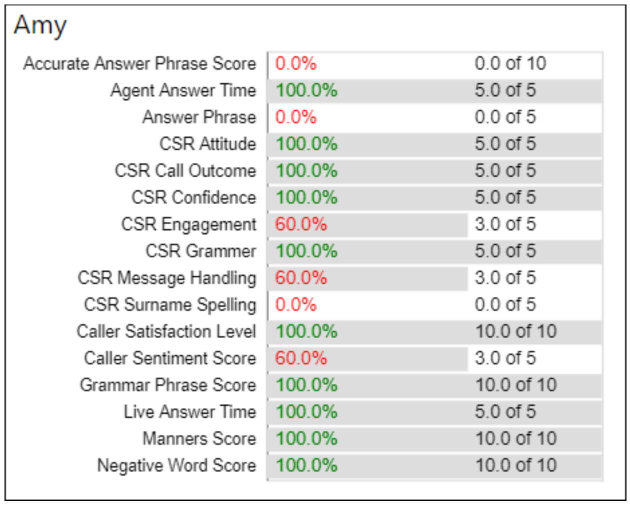
The second column displays the difference between the Average Agent Percentage and the composite average percentage, which is the overall average of all Score Label scores relative to the maximum possible score.

Note: The Average Agent Percentage is compared to the composite average percentage only for Score Labels which the agent has a score in. If an agent did not receive a score for a Score Label, that average for that Score Label is not included in the calculation for the composite average percentage.

If the Average Agent Percentage is greater than the composite average percentage, the Average Percentage Difference is displayed as a positive number in green. If the Average Agent Percentage is less than the composite average percentage, the Average Score Difference is displayed as a negative number in red.

Agent Scores

The Agent Scores bar chart displays the average percentage of scores assigned to each Score Label for the agent for the dataset. Each Agent Scores bar chart is titled with the Login Name of the agent whose data is displayed.



Rows are displayed by the name of the Score Label. The Agent Scores chart displays a row for each Score Label represented in the chart. Each row contains the Average Score Label Percentage and the Average Score value.

Score Label

The Score Label is displayed along the left side of each row.

Average Score Label Percentage

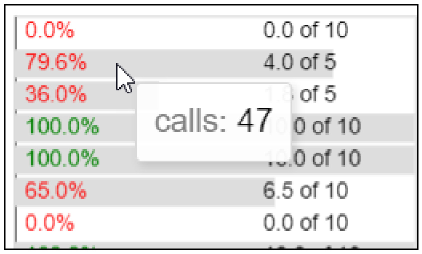
The first column displays the average score assigned to the agent for the Score Label as a percentage of the maximum score possible. The Average Score Label Percentage is displayed as a percentage of the maximum possible score.

The Average Score Label Percentage is displayed in green if the percentage is equal to or greater than 90 percent and in red if the percentage is less than 90 percent.

The Average Score Label Percentage is also represented by the bar displayed across the chart. The bar extends further toward the right the larger the percentage is that it represents.

A tooltip is provided for each bar displayed in the chart.

To display the tooltip for a bar, hover over the bar on the Agent Scores chart.



The tooltip displays the following information about the bar:

- The number of calls that received a score for the Score Label for the agent.

Average Score

The second column displays the average score value assigned to the agent for the Score Label. The Value is followed by "of" and the maximum score possible for the Score Label.

Agent Dashboard

The Login Name above each Agent Scores chart is a hyperlink that is used to display information for the Agent using the Default Agent Dashboard.

To access the Agent Dashboard, click the Login Name above the Agent Score chart for the Agent for which you would like to view information.

The Default Agent Dashboard is displayed.

More information on Dashboards can be found in the *Active Insights Dashboard Reference Guide* document.

Agent Scores Table

Agent Scores

Agent Scores grouped by agent

Export

AGENT	AVG_SCORE	CALL_COUNT	LABEL	MAX_SCORE	PERCENTAGE	SCORE_AVERAGE	SCORE_CALC	SCORE_COUNT	SCORE_PERCENTAGE
Gary	10.00	3	Negative Word Score	10	100.00%	9.78	0.02	36	97.83%
award	10.00	1	Negative Word Score	10	100.00%	9.78	0.02	36	97.83%
mallen	10.00	1	Negative Word Score	10	100.00%	9.78	0.02	36	97.83%
Amy	10.00	1	Manners Score	10	100.00%	0.29	0.97	36	2.90%
mallen	10.00	1	Grammar Phrase Score	10	100.00%	9.72	0.03	36	97.22%
David	10.00	3	Caller Satisfaction Level	10	100.00%	9.86	0.01	36	98.55%

The Agent Scores table displays a list of agent statistics related to Scores assigned by Post Call Scoring Scripts. Information presented by the Agent Scores table is displayed alphabetically by agent Login Name.

The Agent Scores table has the following columns.

Column	Description
Agent	The Agent column displays the Login Name for the agent whose statistics are displayed in the row.

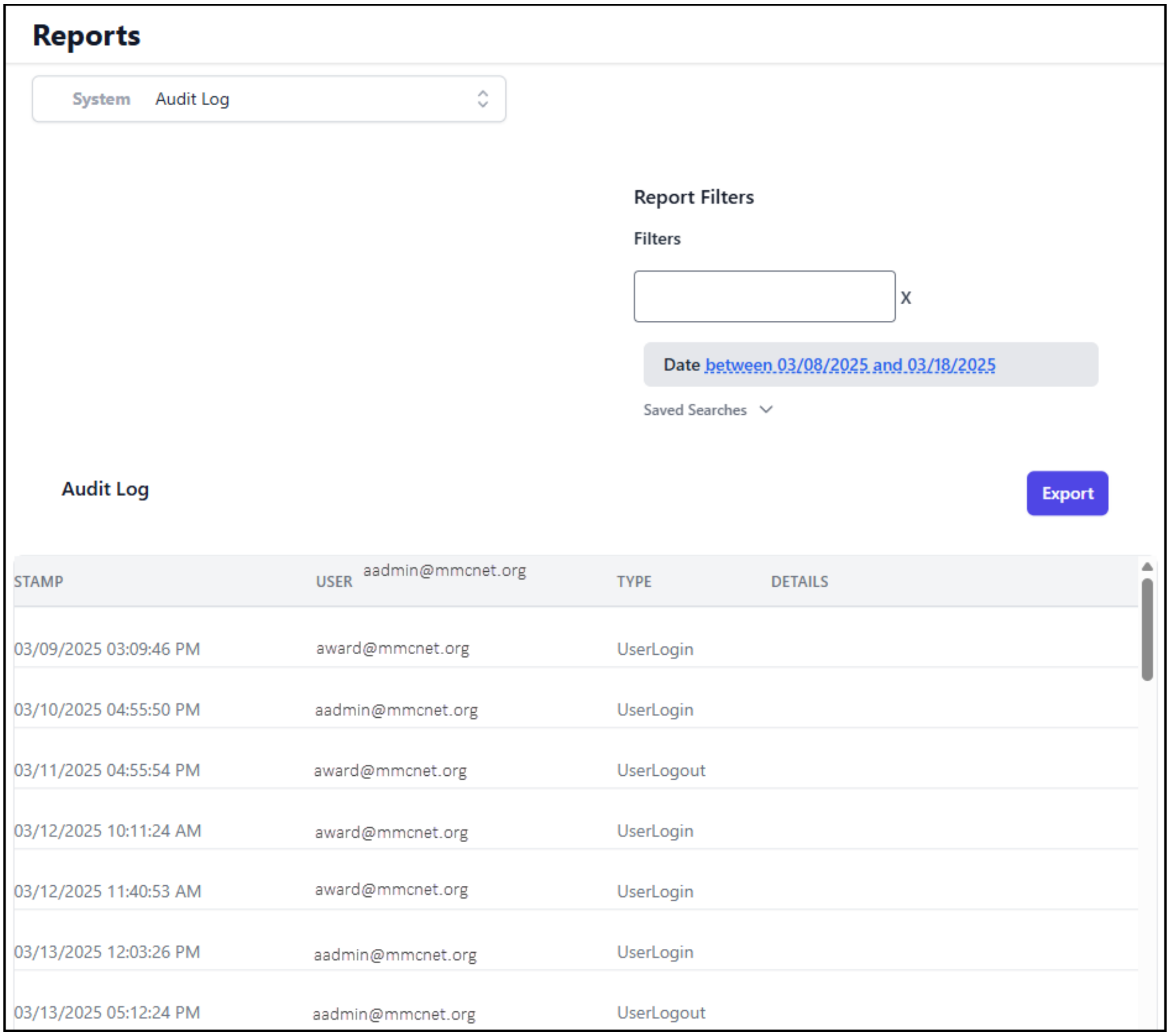
Column	Description
Initials	The Initials column displays the initials assigned to the agent.
Score_Average	The Score Average column displays the average of all scores received for all agents for the Score Label.
Score_Calc	The Score Calc column displays the difference in percentages between the Percentage column as the Score Percentage column.
Score_Count	The Score Count column displays the total number of Score Labels included in the table.
Score_Percentage	The Score Percentage column displays the percentage of the Maximum Score that the Score Average achieves.
Agent_Abandon_Count	The Agent Abandon Count displays the number of calls in which the caller hung up after the call was assigned to the agent but before the agent answered the call.
Call_Count	The Call Count column displays the number of calls for which the agent received a score for the listed Score Label.
Label	The Label column displays the Score Label for which statistics are being presented in the row.
Avg_Score	The Average Score column displays the average of all scores that the agent received for the listed Score Label.
Max_Score	The Max Score column displays the maximum score that can be received for the listed Score Label.

Audit Log

The Audit Log report is a system level report that displays activity related to Active Insights users.

The Audit Log cannot be grouped by any specific category, and when the Audit Log report is selected in the Report Types field, the Report Filters section does not contain the Group By field.

Audit Log Report



The Audit Log report contains the Audit Log table.

Audit Log Table

Audit Log

Export

STAMP	USER	TYPE	DETAILS
05/01/2024 08:58:26 AM	award@mmcnet.com	UserLogin	
05/01/2024 08:58:39 AM	amichael@mmcnet.com	UserLogin	
05/01/2024 08:59:11 AM	award@mmcnet.com	InviteUser	email: esorenson@mmcnet.com
05/01/2024 09:06:09 AM	amichael@mmcnet.com	PurgeCall	call_id: 3528793
05/01/2024 11:52:53 AM	award@mmcnet.com	UserLogin	
05/01/2024 12:50:46 PM	amichael@mmcnet.com	UserLogin	

The Audit Log table displays log entries regarding Active Insights user activity. Log entries displayed in the Audit Log table are presented in chronological order by the date and time at which the logged activity occurred.

The Audit Log table has the following columns.

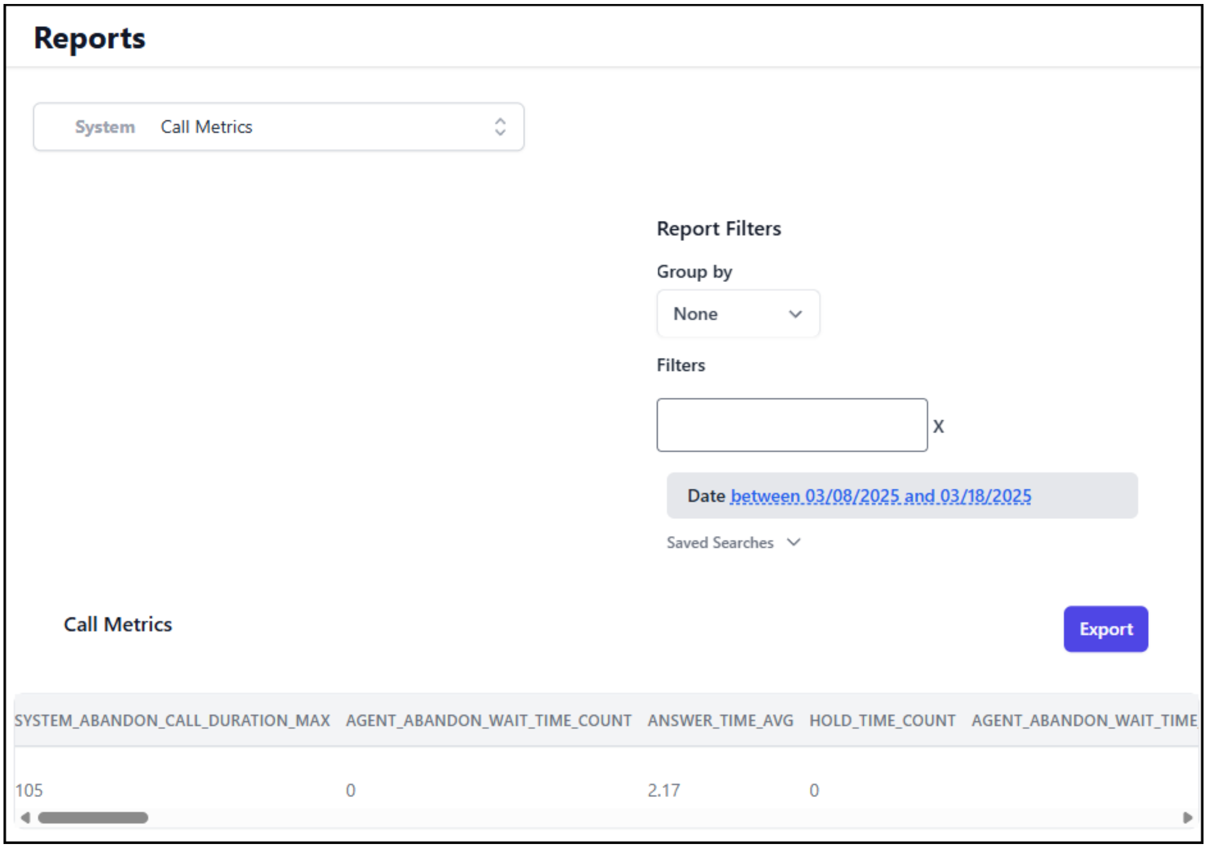
Column	Description
Stamp	The Stamp column displays the date and time in which the log entry was created in MM/DD/YYYY and hhh:mm:ss format.
User	The User column displays the e-mail address belonging to the Active Insights user who performed the action that is being logged.
Type	The Type column displays the type of action logged. The following Types are possible: • The user_login type represents when the user logged into the Active Insights platform. • The user_logout type represents when the user logged out of the Active Insights platform. • The user_password_change type represents when the user changed their password.

Column	Description
	• The invite_user type represents when the user invited a new user to access the Active Insights platform. • The purge_call type represents when the user purged any call data from a call. • The delete_user type represents when the user deleted a user from the Active Insights platform.
Details	The Details column displays details relevant to the Type of action logged.

Call Metrics

The Call Metric report is a call report that displays statistics for system service quality. The Group By field for the Call Metrics report can be set to the "None," "Agent," "Date," or "Client" options.

Call Metrics Report (Grouped By None)

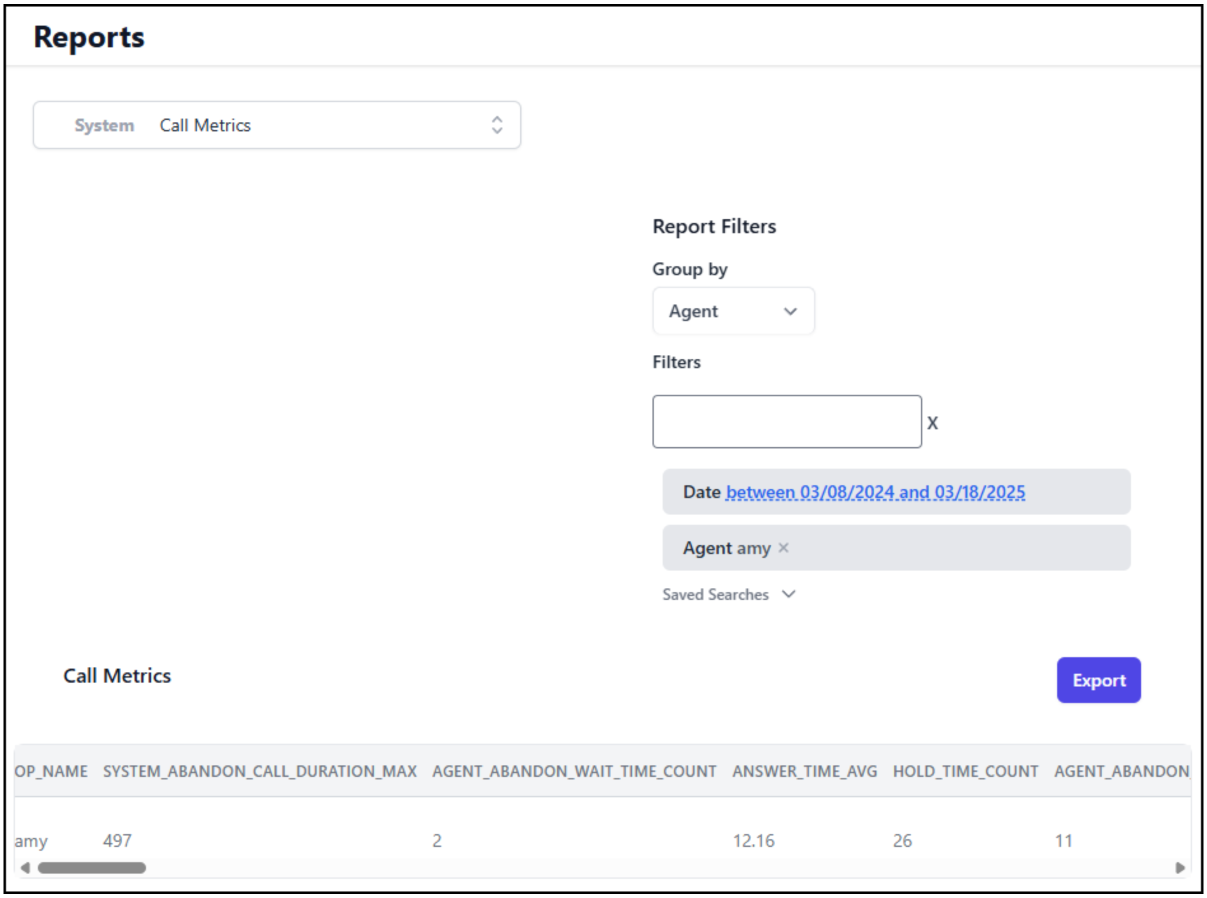


When the Group By field for the Call Metrics report is set to "None," the Reports page displays the Call Metrics table.

Call Metrics Table

The Call Metrics table displays information related to calls and call answering in the system. When the Group By field is set to "None" for the Call Metrics report, no statistics are displayed in addition to the base statistics for the Call Metrics table. Additionally, the Call Metrics table displays a single row, which represents statistics for the entire system.

Call Metrics Report (Grouped By Agent)

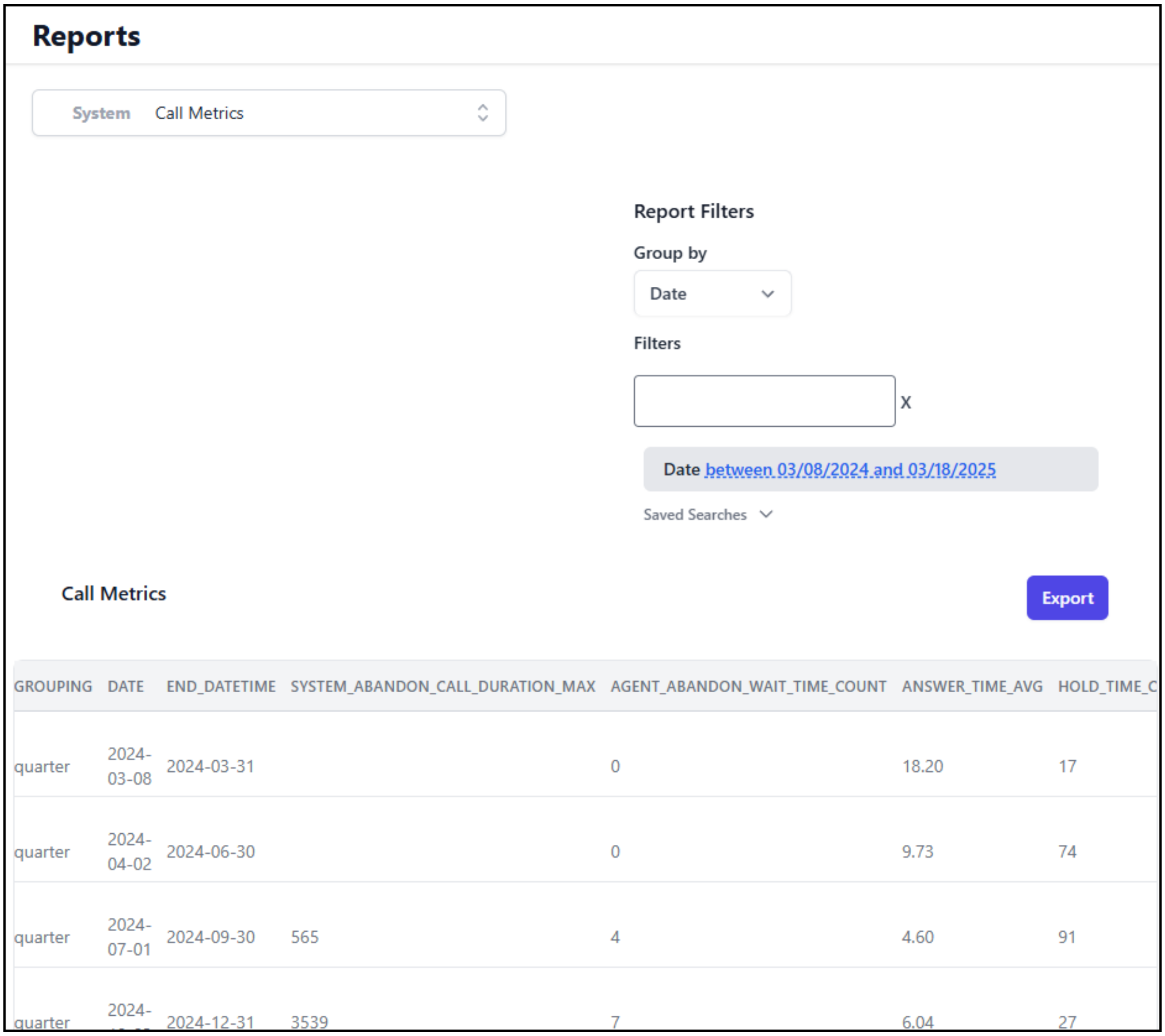


When the Group By field for the Call Metrics report is set to “Agent,” the Reports page displays the Call Metrics table.

Call Metrics Table

The Call Metrics table displays information related to call and call answering in the system. When the Group By field is set to “Agent” for the Call Metrics report, the Call Metrics table displays a row for each Agent ID for which statistics are being displayed.

Call Metrics Report (Grouped By Date)



When Group By field for the Call Metrics Report is set to “Date,” the Reports page displays the Call Metrics table.

Call Metrics Table

The Call Metrics table displays information related to call and call answering in the system. When the Group By field is set to “Date” for the Call Metrics report, the Call Metrics table displays a row for each section of time for which statistics are displayed.

Call Metrics Report (Grouped By Client)

When Group By field for the Call Metrics Report is set to “Client,” the Reports page displays the Call Metrics table.

Call Metrics Table

The Call Metrics table displays information related to call and call answering in the system. When the Group By field is set to “Client” for the Call Metrics report, the Call Metrics table displays a row for each Client for which statistics are displayed.

GROUPING	DATE	END_DATETIME	SYSTEM_ABANDON_CALL_DURATION_MAX	AGENT_ABANDON_WAIT_TIME_COUNT	ANSWER_TIME_AVG	HOLD_TIME_COUNT	AGENT_ABANDON_WAIT_TIME_MIN	CALL_DU
day	2025-05-05	2025-05-05T09:18:37.407226-05:00		0	1.91	0		11
day	2025-05-06	2025-05-06T10:41:56.437196-05:00		0	5.83	2		7
day	2025-05-07	2025-05-07T11:14:22.159330-05:00		1	2.00	0	18	5
day	2025-05-08	2025-05-08T11:55:52.549447-05:00		0	5.33	8		12
day	2025-05-09	2025-05-09T10:36:44.449291-05:00		0	10.67	6		11

Call Metrics Table Columns

The Call Metrics table displays general statistics related to calls and call handling in the system. The Call Metrics table displays rows based on the option selected for the Group By field for the Call Metrics report.

Each Call Metrics table displays a column for each statistic being presented. In addition to these statistics, each Call Metrics table may contain one or more additional columns depending on what option is selected for the Group By field for the Call Metrics report. These additional columns are displayed to the left of the base Call Metric statistics.

Each Call Metrics table includes a column for each of the following statistics:

Column	Description
Op_Name *Group by Agent*	When the Group By parameter is set to “Agent,” the Op_Name column is shown. The Op_Name column displays the Agent Name for the agent whose statistics are represented in the row. The Agent Name is displayed as it is configured in the Agent Setup window of the IS Supervisor application.
Grouping *Group by Date*	When the Group By parameter is set to “Date,” the Grouping column is shown. The Grouping column displays the size of the segment of time for which statistics are displayed in the row. The Grouping column displays “day,” “month,” “quarter,” or “year,”

Column	Description
	depending on the size of the segment of time selected in the Date filter under the Report Filters section. • "day" is displayed if the Date filter contains a range fewer than 30 days. • "month" is displayed if the Date filter contains a range greater than or equal to 30 days but fewer than 90 days. • "quarter" is displayed if the Date filter contains a range greater than or equal to 90 days but fewer than 365 days. "year" is displayed if the Date filter contains a range greater than or equal to 365 days.
Date *Group by Date*	When the Group By parameter is set to "Date," the Date column is shown. The Date column displays the starting date for which statistics are displayed in the row.
End_DateTime *Group by Date*	When the Group By parameter is set to "Date," the End_DateTime column is shown. The End_DateTime column displays the ending date and time for which statistics are displayed in the row.
Client_Number *Group by Client*	When the Group By parameter is set to "Client," the Client_Number column is shown. The Client Number column displays the unique Client Number which represents the Client for whom statistics are displayed in the row.
Client_Name *Group by Client*	When the Group By parameter is set to "Client," the Client_Name column is shown. The Client Name column displays the name of the Client for whom statistics are displayed in the row.
System_Abandon _Call_Duration_Max	The System_Abandon_Call_Duration_Max column displays the greatest number of seconds between when a call entered the system and when the caller hung up without the call being answered.
Agent_Abandon _Wait_Time_Count	The Agent_Abandon_Wait_Time_Count column displays the number of calls in which the caller hung up after the call was distributed to an agent and entered the Waits queue.
Answer_Time_Avg	The Answer_Time_Avg column displays the average number of seconds for which calls were in the Ring state for calls which were answered.

Call Metrics

Column	Description
Hold_Time_Count	The Hold_Time_Count column displays the number of calls which entered the Hold state.
Agent_Abandon_Wait_Time_Min	The Agent_Abandon_Wait_Time_Min column displays the fewest number of seconds that Agent Abandon calls were in the Waits queue. Agent Abandons are calls in which the caller hung up after the call was distributed to an agent without the call being answered.
Call_Duration_Count	The Call_Duration_Count column displays the total number of calls.
Agent_Abandon_Call_Duration_P95	The Agent_Abandon_Call_Duration_P95 column displays the value that is greater than 95 percent of duration values for Agent Abandon calls. Agent Abandon Call Duration is calculated as the number of seconds between when a call entered the system and when the caller hung up without the call being answered.
Agent_Abandon_Time_P95	The Agent_Abandon_Time_P95 column displays the value that is greater than 95 percent of Agent Abandon Time values. Agent Abandon Time is calculated as the number of seconds between when a call was distributed to an agent and when the caller hung up without being answered.
Wait_Time_Avg	The Wait_Time_Avg column displays the average number of seconds calls were in the Waits queue for calls which entered the Waits queue.
Answer_Time_Max	The Answer_Time_Max column displays the greatest number of seconds a call was in the Ring state for calls which were answered.
Agent_Abandon_Wait_Time_P95	The Agent_Abandon_Wait_Time_P95 column displays the value that is greater than 95 percent of the Agent Abandon Wait Time values. Agent Abandon Wait Time is calculated as the number of seconds that an Agent Abandon call was in the Waits queue. Agent Abandons are calls in which the caller hung up after the call was distributed to an agent without the call being answered.
Hold_Time_Min	The Hold_Time_Min column displays the fewest number of seconds calls were in the Hold state for calls which entered the Hold state.
System_Abandon_Call_Duration_P95	The System_Abandon_Call_Duration_P95 column displays the value that is greater than 95 percent of System Abandon Call Duration values.

Column	Description
	System Abandon Call Duration is calculated as the number of seconds between when a call entered the system and when the caller hung up without the call being distributed to an agent.
Wait_Time_Max	The Wait_Time_Max column displays the greatest number of seconds for which a call was in the Waits queue.
Agent_Abandon _Time_Avg	The Agent_Abandon_Time_Avg column displays the average number of seconds between when a call was distributed to an agent and when the caller hung up without the call being answered.
Call_Duration_Max	The Call_Duration_Max column displays the greatest number of seconds between when a call entered the system and when the call ended.
Call_Duration_Min	The Call_Duration_Min column displays the fewest seconds between when a call entered the system and when the call ended.
Agent_Abandon _Time_Min	The Agent_Abandon_Time_Min column displays the fewest number of seconds between when a call was distributed to an agent and when the caller hung up without the call being answered.
Hold_Time_P99	The Hold_Time_P99 column displays the value that is greater than 99 percent of Hold Time values. Hold Time is calculated as the number of seconds that the call was in the hold state for calls which entered the Hold State.
Wait_Time_Min	The Wait_Time_Min column displays the fewest number of seconds for which calls were in the Waits queue.
System_Abandon _Time_Min	The System_Abandon_Time_Min column displays the shortest duration in seconds for a call in which the caller hung up before the call was distributed to an agent.
System_Abandon _Call_Duration_Count	The System_Abandon_Call_Duration_Count column displays the number of calls in which the caller hung up before the call was distributed to an agent.
Agent_Abandon _Call_Duration_Avg	The Agent_Abandon_Call_Duration_Avg column displays the average number of seconds from when a call entered the system to when the caller hung up without the call being answered.
Agent_Abandon _Wait_Time_Avg	The Agent_Abandon_Wait_Time_Avg column displays the average number of seconds Agent Abandon calls were in the Waits queue. Agent Abandons are calls in which the caller hung up after the call was distributed to an agent without the call being answered.

Call Metrics

Column	Description
Hold_Time_Max	The Hold_Time_Max column displays the greatest number of seconds that a call was in the Hold state.
Agent_Abandon _Time_Count	The Agent_Abandon_Time_Count column displays the number of calls in which the caller hung up after the call was distributed to an agent but before the call was answered.
Agent_Abandon _Call_Duration_Min	The Agent_Abandon_Call_Duration_Min column displays the fewest number of seconds between when a call entered the system and when the caller hung up without the call being answered.
Agent_Abandon_Wait _Time_Max	The Agent_Abandon_Wait_Time_Max column displays the greatest number of seconds a call was in the Waits queue for calls in which the caller hung up after the call was distributed to an agent but before the call was answered.
Wait_Time_Count	The Wait_Time_Count column displays the number of calls which spent time in the Waits queue.
System_Abandon _Time_P95	The System_Abandon_Time_P95 column displays the value that is greater than 95 percent of System abandon values. System Abandon Time is calculated as the number of seconds between when a System Abandon call was distributed to a queue and when the caller hung up. System Abandons are calls in which the caller hung up without the call being assigned to an agent.
System_Abandon _Time_Count	The System_Abandon_Time_Count column displays the number of calls in which the caller hung up before the call was distributed to an agent.
Wait_Time_P95	The Wait_Time_P95 column displays the value that is greater than 95 percent of Wait Time values. Wait Time is calculated as the number of seconds that a call was in the Waits queue.
Answer_Time_Count	The Answer_Time_Count column displays the number of calls which were answered by an agent.
Answer_Time_P99	The Answer_Time_P99 column displays the value that is greater than 99 percent of Answer Time values. Answer Time is calculated as the number of seconds that a call was in the Ring state for calls which were answered.
Agent_Abandon_Call _Duration_Count	The Agent_Abandon_Call_Duration_Count column displays the number of calls in which the caller hung up after the call had been distributed to an agent but before the call was answered.

Column	Description
System_Abandon _Time_P99	The System_Abandon_Time_P99 column displays the value that is greater than 99 percent of System Abandon Time values. System Abandon Time is calculated as the number of seconds between when a System Abandon call was distributed to a queue and when the caller hung up. System Abandons are calls in which the caller hung up without the call being assigned to an agent.
System_Abandon _Call_Duration_Min	The System_Abandon_Call_Duration_Min column displays the fewest seconds between when the call entered the system and when the caller hung up without the call being distributed to an agent.
Answer_Time_Min	The Answer_Time_Min column displays the fewest seconds for which a call was in the Ring state for calls which were answered.
Agent_Abandon_ Call_Duration_P99	The Agent_Abandon_Call_Duration_P99 column displays the value that is greater than 99 percent of Agent Abandon Call Duration values. Agent Abandon Call Duration is calculated as the number of seconds between when an Agent Abandon call entered the system and when the caller hung up. Agent Abandons are calls in which the caller hung up after the call was distributed to an agent without the call being answered.
Agent_Abandon _Time_Max	The Agent_Abandon_Time_Max column displays the greatest number of seconds between when an Agent Abandon call was distributed to an agent and when the caller hung up. Agent Abandons are calls in which the caller hung up after the call was distributed to an agent without the call being answered.
Agent_Abandon _Time_P99	The Agent_Abandon_Time_P99 column displays the value that is greater than 99 percent of Agent Abandon Time values. Agent Abandon Time is calculated as the number of seconds between when an Agent Abandon call was distributed to an agent and when the caller hung up. Agent Abandons are calls in which the caller hung up after the call was distributed to an agent without the call being answered.
Call_Duration_Avg	The Call_Duration_Avg column displays the average number of seconds between when a call entered the system and when the call ended.
Call_Duration_P99	The Call_Duration_P99 column displays the value that is greater than 99 percent of Call Duration values.

Column	Description
	Call Duration is calculated as the number of seconds between when a call entered the system and when the call ended.
System_Abandon _Call_Duration_P99	The System_Abandon_Call_Duration_P99 column displays the value that is greater than 99 percent of System Abandon Call Duration values. System Abandon Call Duration is calculated as the number of seconds from when a System Abandon call entered the system and when the caller hung up. System Abandons are calls in which the caller hung up without the call being assigned to an agent.
Agent_Abandon _Wait_Time_P99	The Agent_Abandon_Wait_Time_P99 column displays the value that is greater than 99 percent of Agent Abandon Wait Time values. Agent Abandon Wait Time is calculated as the number of seconds an Agent Abandon call was in the Waits queue for calls in which the caller hung up. Agent Abandons are calls in which the caller hung up after the call was distributed to an agent without the call being answered.
System_Abandon _Call_Duration_Avg	The System_Abandon_Call_Duration_Avg column displays the average number of seconds between when a System Abandon call entered the system and when the caller hung up. System Abandons are calls in which the caller hung up without the call being assigned to an agent.
System_Abandon _Time_Max	The System_Abandon_Time_Max column displays the greatest number of seconds between when a System Abandon call entered the system and when the caller hung up. System Abandons are calls in which the caller hung up without the call being assigned to an agent.
Wait_Time_P99	The Wait_Time_P99 column displays the value that is greater than 99 percent of Wait Time values. Wait Time is calculated as the number of seconds that call the is in the Waits queue.
Call_Duration_P95	The Call_Duration_P95 column displays the value that is greater than 95 percent of Call Duration values. Call Duration is calculated as the number of seconds between when a call entered the system and when the call ended.

Column	Description
Hold_Time_Avg	The Hold_Time_Avg column displays the average number of seconds that calls were in the Hold state for calls which were placed in the Hold state.
Answer_Time_P95	The Answer_Time_P95 column displays the value that is greater than 95 percent of Answer Time values. Answer Time is calculated as the number of seconds that a call was in the Ring state for calls which were answered.
Hold_Time_P95	The Hold_Time_P95 column displays the value that is greater than 95 percent of Hold Time values. Hold Time is calculated as the number of seconds that a call was in the Hold state for calls which were put in the Hold state.
Agent_Abandon _Call_Duration_Max	The Agent_Abandon_Call_Duration_Max column displays the greatest number of seconds between when an Agent Abandon call entered the system and when the caller hung up. System Abandons are calls in which the caller hung up without the call being assigned to an agent.
System_Abandon _Time_Avg	The System_Abandon_Time_Avg column displays the average number of seconds from when System Abandon calls were distributed to a queue and when the caller hung up. System Abandons are calls in which the caller hung up without the call being assigned to an agent.

Client Usage

The Client Usage report is a system level report that displays usage data for Clients in the system.

The Client Usage report cannot be grouped by any specific category. When the Client Usage report is selected in the Report Types field, the Report Filters section does not contain the Group By field.

Client Usage Table

The Client Usage table displays a list of client statistics related to data and storage usage by Clients in the system. Information presented on the Client Usage table is organized in ascending order by Client Number.

CLIENT_NUMBER	CLIENT_NAME	VOICE_RECORDING_COUNT	VOICE_RECORDING_SIZE	SCREEN_RECORDING_COUNT	SCREEEN_RECORDING_SIZE	MESSAGE_COUNT	MESSAGE_SIZE	CALL_COUNT	CALL_SIZE
3	Account Help	0	0.00	0		1	6.27k	5	43.44k
314	Mercy Medical Network	857	32.52M	100	266.27G	0	0.00	0	0.00
2144	Hospital Emergency Codes	266	10.52M	157	400.69M	138	4.76M	286	1.23M
400100	Code Script Template	8	432.75k	8		60	5.69M	42	183.52k

The Client Usage table displays the following columns:

Column	Description
Client Number	The Client Number column displays each Client Number for which storage is allocated in Active Insights.
Client Name	The Client Name column displays the Client Name assigned to the Client Number in the Client Setup pages of Web Supervisor or Intelligent Series (IS) Supervisor.
Video Recording Count	The Video Recording Count column displays the number of audio recordings in Cloud Storage for the Client.
Video Recording Size	The Video Recording Size column displays the amount of storage utilized by audio recordings in Cloud Storage for the Client.
Screen Recording Count	The Screen Recording Count column displays the number of Screen Capture recordings in Cloud Storage for the Client.
Screen Recording Size	The Screen Recordings Size column displays the amount of storage utilized by Screen Capture recordings in Cloud Storage for the Client.
Message Count	The Message Count column Displays the number of messages in Cloud Storage for the Client.
Message Size	The Messages Size column displays the amount of Cloud Storage utilized by message data for the Client.
Call Count	The Call Count column displays the number of calls in Cloud Storage for the Client.

Column	Description
Calls Size	The Calls Size column displays the amount of Cloud Storage utilized by the basic call data for the Client, such as associated Clients, agents, call events, start time, and Call ID.
Transcription Usage	The Transcription Usage column displays the number of hours of transcription that have been used by the Client.
A.I. Usage	The A.I. Usage column displays the number of AI Units that have been used by the Client. **Note:** Each AI Unit represents 1000 tokens.

Custom Service Level

The Custom Service Level report is a call report that displays general system service data. The Group By field for the Custom Service Level report can be set to “None,” “Agent,” “Date,” “Skill,” or “Client.”

Each Custom Service Level report contains a Custom Service Level table.

The Custom Service Level report also includes the Edit Report button.

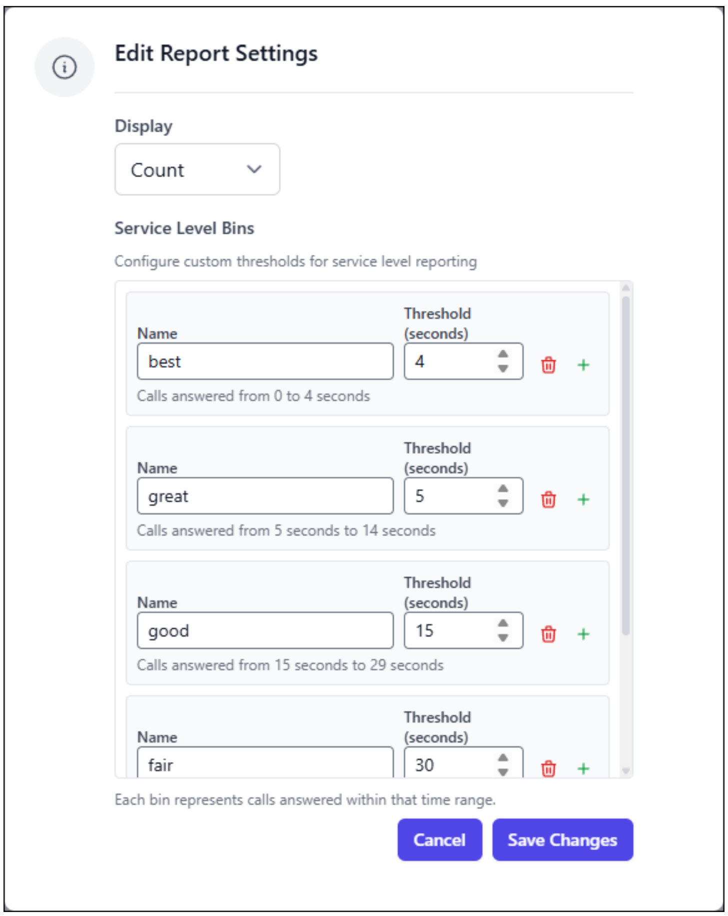
Edit Report

The Edit Report Settings window is used to configure custom service level bins which are used to categorize data generated by Custom Service Level report.

To display the Edit Report window, click the Edit Report Settings button.

The Edit Report Settings window is displayed.

The Edit Report Settings window contains the Display field and the Service Level Bins section.



Display

The Display field is used to modify the data displayed for the Abandon_Agent, Abandon_System, and Custom Service Level columns. The Display field can be set to “Count” or “Percentage.”

Count

When the Display field is set to "Count," the affected columns display the total number of calls that fit the parameter for each column.

Percentage

When the Display field is set to "Percentage," the affected columns display the calls that fit the parameter for each column as a percentage of the total number of calls represented by the row.

Service Level Bins

The Service Level Bins list is used to configure between two and six custom service level bins for sorting calls in the Custom Service Level report. Each Service Level Bin represents a range of seconds, and any calls with an answer time within that range are represented in the service level column on the Custom Service Level table.

The Service Level Bin list contains a Bin pane for each bin. Each Bin pane can contain the Name field and the Threshold field. Depending on the number of Service Level Bins created, the Delete icon and the Add icon may also be displayed.

Bin panes must be entered in ascending order by threshold.

Name

The Name field is used to assign a name to the column displayed for the bin in the Custom Service Level report.

Text entered in the Name field is displayed in the column header for the column.

Threshold (seconds)

The Threshold field is used to configure range in seconds for which calls with an answer time in that range are represented.

The Threshold range is represented at the bottom of the bin pane with the text "Calls answered from between X to Y seconds," where X is the starting value of the range and Y is the ending value of the range.

To update the value of a bin, enter a new number in the Threshold field.

The Threshold value of each Service Level Bin must be greater than the Threshold value of the bin above it. If you attempt to update the Threshold value to a value that is lower than the bin above it or higher than the bin below it, Active Insights will not let you save the Edit Report Settings window until the issue is corrected.

Range for First Bin

For the first bin, the Threshold field is used to configure the upper limit of the range. The range of the first bin is between 0 (zero) and the value entered in the Threshold field.

Range for Other Bins

For all bins after the first, the Threshold field is used to configure the lower limit of the range. The range for all bins after the first is between the Threshold value entered for the bin and one less than the Threshold value entered for the bin below it.

Note: It is possible to create an unrepresented range between the first bin and the second bin if the Threshold value of the second bin is more than one second higher than the Threshold value of the first bin.

Add

The Add icon + is used to add a bin to the Service Level Bins list. The bin is added below the bin for which the add icon was clicked.

Note: The Service Level Bins list can contain a maximum of six bins. While six bins are active, the Add icon + is removed and no more bins can be created until one is removed.

When the Add icon + is clicked, a new Service Level Bin is created, and a new Bin pane is displayed below the current Bin pane.

Delete

The Delete icon is used to delete a bin from the Service Level Bins list.

Note: The Service Level Bins list can contain a minimum of two bins. While only two bins are active, the Delete icon is removed and no more bins can be removed until one is created.

When the Delete icon for a bin is clicked, the bin is deleted and the Bin pane is removed from the Service Level Bins list. Where possible, the threshold range of the bin above the deleted bin expands to include the range of the deleted bin.

Note: If the second bin in the Service Level Bins list is deleted, the threshold range of neither the first bin nor the third bin will expand to include the threshold range of the deleted bin.

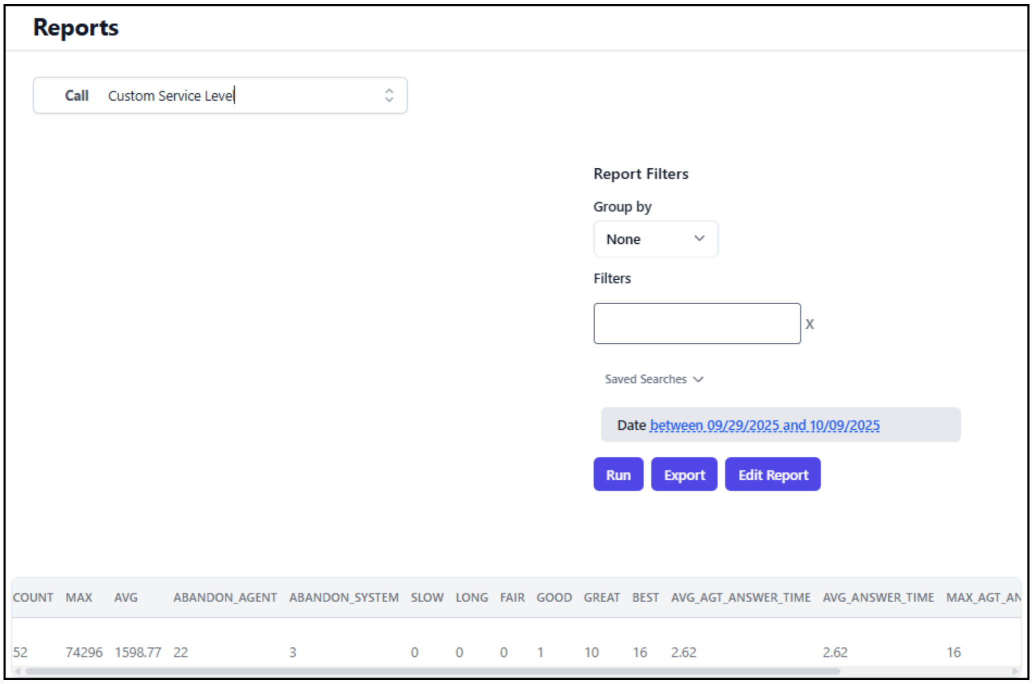
Saving Changes

All changes made to the Edit Report settings page must be saved before they go into effect.

When the Save Changes button is clicked, changes made to the Edit Report Settings page are saved.

When the Cancel button is clicked, the changes made to the Edit Report Settings page are not saved.

Custom Service Level Report (Grouped By None)

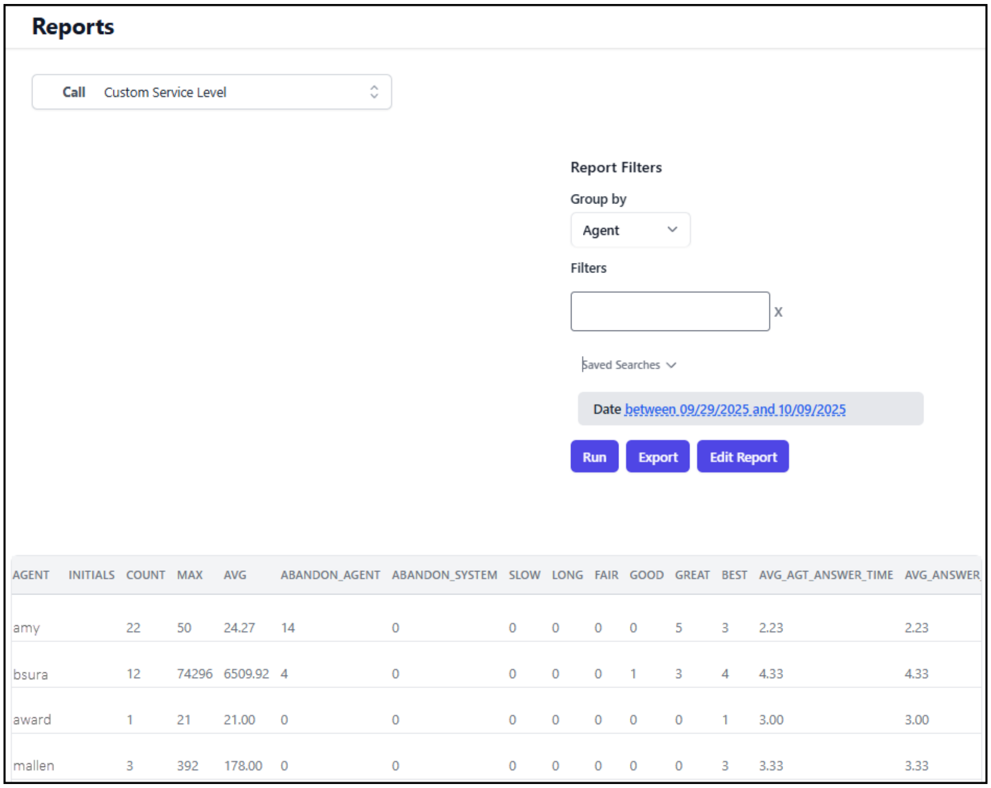


When the Group By field for the Custom Service Level report is set to “None,” the Custom Service Level report contains the Custom Service Levels table.

Custom Service Level Table

The Custom Service Level table displays information related to service quality in the system. When the Group By field is set to “None” for the Custom Service Level report, the Custom Service Level table displays a row which represents service statistics for the entire system.

Custom Service Level Report (Grouped By Agent)



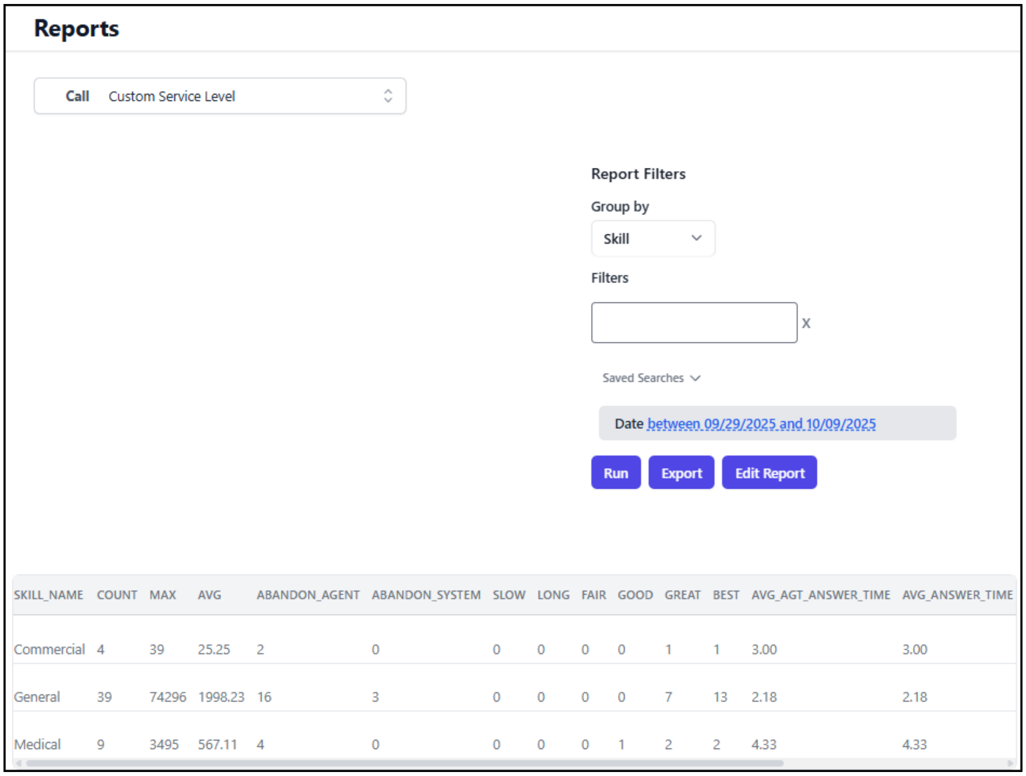
AGENT	INITIALS	COUNT	MAX	AVG	ABANDON_AGENT	ABANDON_SYSTEM	SLOW	LONG	FAIR	GOOD	GREAT	BEST	AVG_AGT_ANSWER_TIME	AVG_ANSWER
amy		22	50	24.27	14	0	0	0	0	0	5	3	2.23	2.23
bsura		12	74296	6509.92	4	0	0	0	0	1	3	4	4.33	4.33
award		1	21	21.00	0	0	0	0	0	0	0	1	3.00	3.00
mallen		3	392	178.00	0	0	0	0	0	0	0	3	3.33	3.33

When the Group By field for the Custom Service Level report is set to “Agent,” the Custom Service Level report contains the Custom Service Levels table.

Custom Service Level Table

The Custom Service Level table displays information related to service quality in the system. When the Group By field is set to “Agent” for the Custom Service Level report, the Custom Service Level table displays a single row for each Agent for whom data is displayed.

Service Level Report (Grouped By Skill)

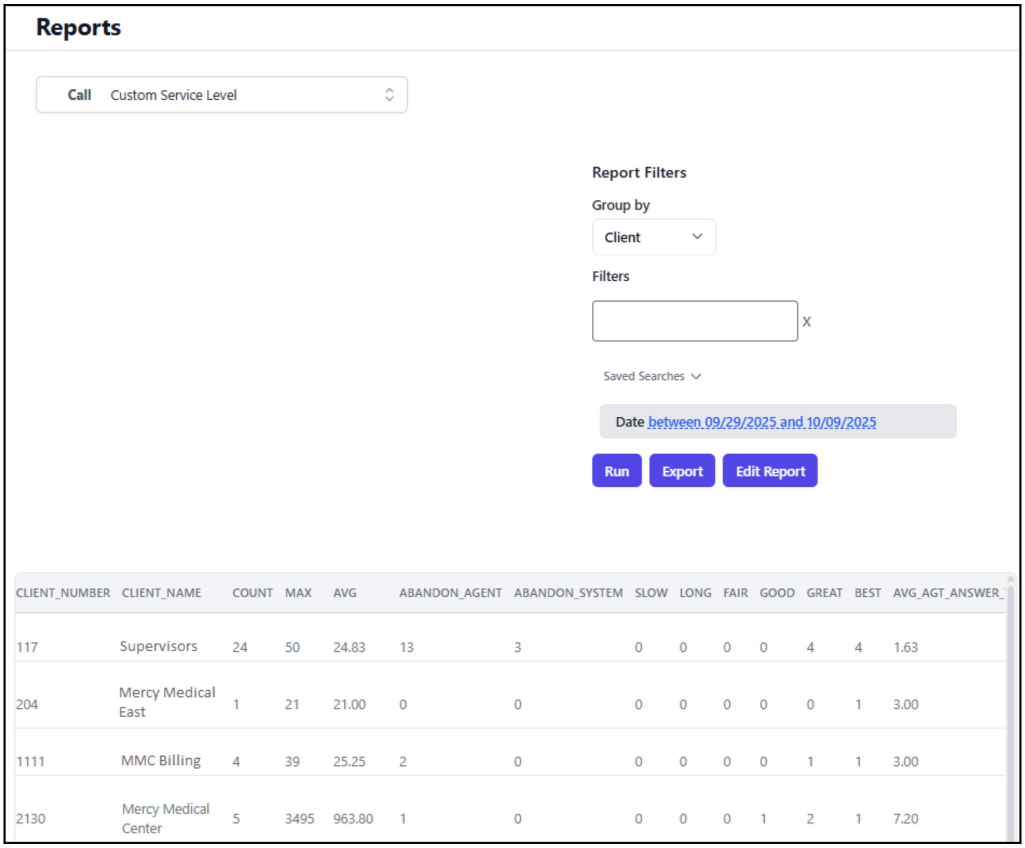


When the Group By field for the Custom Service Level report is set to "Skill," the Custom Service Level report contains the Custom Service Levels table.

System Service Level Table

The Custom Service Level table displays information related to service quality in the system. When the Group By field is set to "Skill" for the Custom Service Level report, the Custom Service Level table displays a row for each Skill for which data is displayed.

Service Level Report (Grouped By Client)



CLIENT_NUMBER	CLIENT_NAME	COUNT	MAX	AVG	ABANDON_AGENT	ABANDON_SYSTEM	SLOW	LONG	FAIR	GOOD	GREAT	BEST	AVG_AGT_ANSWER_
117	Supervisors	24	50	24.83	13	3	0	0	0	0	4	4	1.63
204	Mercy Medical East	1	21	21.00	0	0	0	0	0	0	0	1	3.00
1111	MMC Billing	4	39	25.25	2	0	0	0	0	0	1	1	3.00
2130	Mercy Medical Center	5	3495	963.80	1	0	0	0	0	1	2	1	7.20

When the Group By field for the Custom Service Level report is set to “Client,” the Custom Service Level report contains the Custom Service Levels table.

System Service Level Table

The Custom Service Level table displays information related to service quality in the system. When the Group By field is set to “Client” for the Custom Service Level report, the custom Service Level table displays a row for each Client which is represented by the data.

Custom Service Level Columns

The Custom Service Level table displays data calculated for the report. The Custom Service Level table displays rows based on the option selected for the Group By field for the Custom Service Level report.

Each Custom Service Level table displays a column for each statistic being presented. In addition to these statistics, each Custom Service Level table may contain one or more additional columns depending on what option is selected for the Group By field for the Custom Service Level report. These additional columns are displayed to the left of the base custom Service Level statistics.

Each Custom Service Level table includes a column for each of the following statistics:

Column	Description
Agent *Group by Agent*	When the Group By parameter is set to "Agent," the Agent column is shown. The Agent column displays the name of the agent for whom statistics are displayed.
Initials *Group by Agent*	When the Group By parameter is set to "Agent," the Initials column is shown. The Initials column displays the initials of the agent for whom statistics are displayed, as configured in the IS System.
Grouping *Group by Date*	When the Group By parameter is set to "Date," the Grouping column is shown. The Grouping column displays the size of the segment of time for which statistics are displayed in the row. The Grouping column displays "day," "month," "quarter," or "year," depending on the size of the segment of time selected in the Date filter under the Report Filters section. • "day" is displayed if the Date filter contains a range fewer than 30 days. • "month" is displayed if the Date filter contains a range greater than or equal to 30 days but fewer than 90 days. • "quarter" is displayed if the Date filter contains a range greater than or equal to 90 days but fewer than 365 days. • "year" is displayed if the Date filter contains a range greater than or equal to 365 days.
Date *Group by Date*	When the Group By parameter is set to "Date," the Date column is shown. The Date column displays the starting date for which statistics are displayed in the row.
End_DateTime *Group by Date*	When the Group By parameter is set to "Date," the End_DateTime column is shown. The End_DateTime column displays the ending date and time for which statistics are displayed in the row.
Skill *Group by Skill*	When the Group By parameter is set to "Skill," the Skill column is shown. The Skill column displays the ACD Skill for which statistics are displayed.
Client_Number *Group by Client*	When the Group By parameter is set to "Client," the Client_Number column is shown. The Client_Number column displays the unique Client Number which represents the Client for whom statistics are displayed in the row.

Custom Service Level

Column	Description
Client_Name *Group by Client*	When the Group By parameter is set to "Client," the Client_Name column is shown. The Client_Name column displays the name of the Client for whom statistics are displayed in the row.
Count	The Count column displays the total number of calls represented in the row.
Max	The Max column displays the maximum duration in seconds of all calls in the row.
Avg	The Avg column displays the average duration in seconds of all calls in the row.
Abandon_Agent	The Abandon_Agent column displays either the number of calls in the row which were Agent Abandons or the percentage of all calls in the row which were Agent Abandons, depending on the Edit Report Settings. Agent Abandons are calls in which the caller hung up after the call was distributed to an agent without the call being answered.
Abandon_System	The Abandon_System column displays either the number of calls in the row which were System Abandons or the percentage of all calls in the row which were System Abandons, depending on the Edit Report Settings. System Abandons are calls in which the caller hung up without the call being assigned to an agent.
Custom Service Level Columns	The Service Level columns display either the total number of calls or the percentage of calls which fall into the range of one or more custom service levels created in the Edit Report Settings window. Calls are assigned to Custom Service Level columns based on the answer time for the call. Answer time is calculated as the number of seconds the call was in the Ring state for calls which were answered. The Custom Service Level table contains at least two and up to six Custom Service Level columns. The number of Custom Service Level columns, the name of each Custom Service Level column, and the answer time range used to determine which calls are represented by each Custom Service Level column are configured in the Edit Report Window settings.
Avg_Agt_Answer _Time	The Avg_Agt_Answer_Time column displays the average number of seconds that calls were on the agent's call line before being answered.

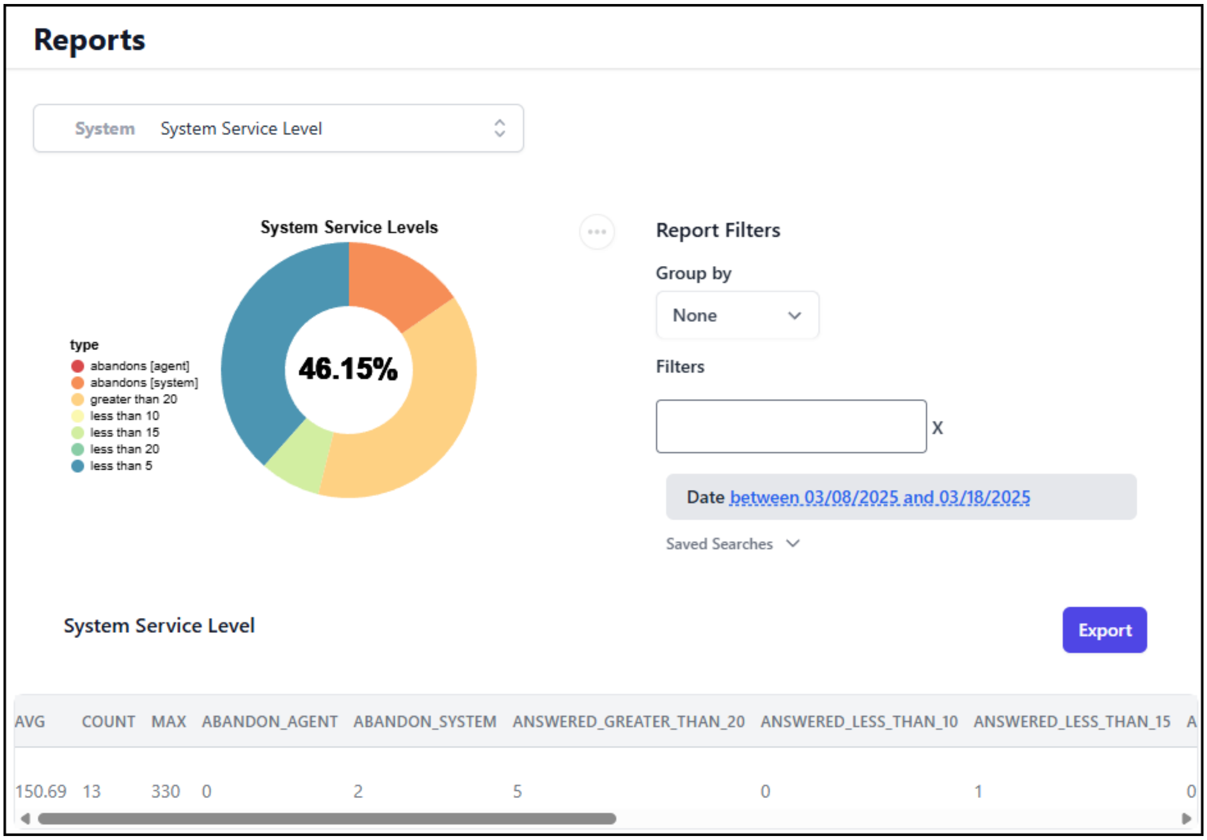
Column	Description
Avg_Answer_Time	The Avg_Answer_Time column displays the average answer time of calls represented by the row in seconds. Answer time is calculated as the number of seconds the call was in the Ring state for calls which were answered.
Max_Agt_Answer _Time	The Max_Agt_Answer_Time column displays the maximum number of seconds that calls were on the agent's call line before being answered.
Max_Answer_Time	The Max_Answer_Time column displays the highest answer time of calls represented by the row in seconds. Answer time is calculated as the number of seconds the call was in the Ring state for calls which were answered.

System Service Level

The System Service Level report is a call report that displays general system service data. The Group By field for the System Service Level report can be set to “None,” “Agent,” “Date,” “Skill,” or “Client.”

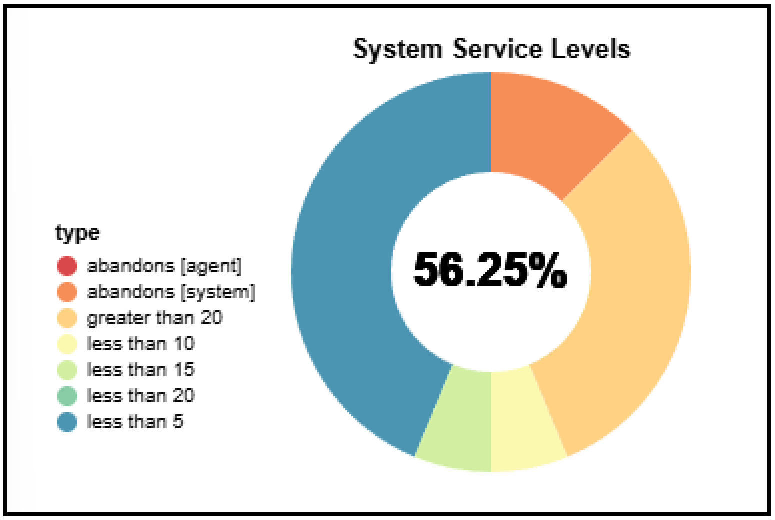
Each System Service Level report contains a System Service Level table.

Service Level Report (Grouped By None)



When the Group By field for the System Service Level report is set to “None,” the System Service Level report contains the System Service Levels pie chart and the System Service Level table.

System Service Levels Pie Chart



The System Service Levels pie chart displays colored wedges in portions based on the percentage of calls that were answered within the listed time range intervals and the percentage of calls that were Agent Abandons or System Abandons. The System Service Levels pie chart sections are displayed in clockwise order following the order of the legend.

The System Service Levels legend indicates what Service Level category is assigned to each color in the System Service Levels pie chart.

The System Service Levels percentage in the center of the pie chart indicates the percentage of calls taken with an answer time of less than 20 seconds.

The pie chart can be used to display calls that are within the Service Level category.

To display calls within the Service Level category, click the section of the pie chart corresponding to the Service Level for which you would like to view calls.

The Calls page is displayed and is filtered by the answer time range or Abandon Type of the Service Level category.

Tooltips

A tooltip is provided for the Service Levels percentage and for each section of the System Service Levels pie chart.

The System Service Levels percentage tooltip displays an explanation of the Service Level percentage.

To display the System Service Level percentage tooltip, hover over the System Service Level Percentage.

The System Service Level percentage tooltip is displayed.

To display the tooltip for a section of the System Service Levels pie chart, hover over the section for which you want the tooltip displayed.

The tooltip for each section of the System Service Level pie chart displays the following information:

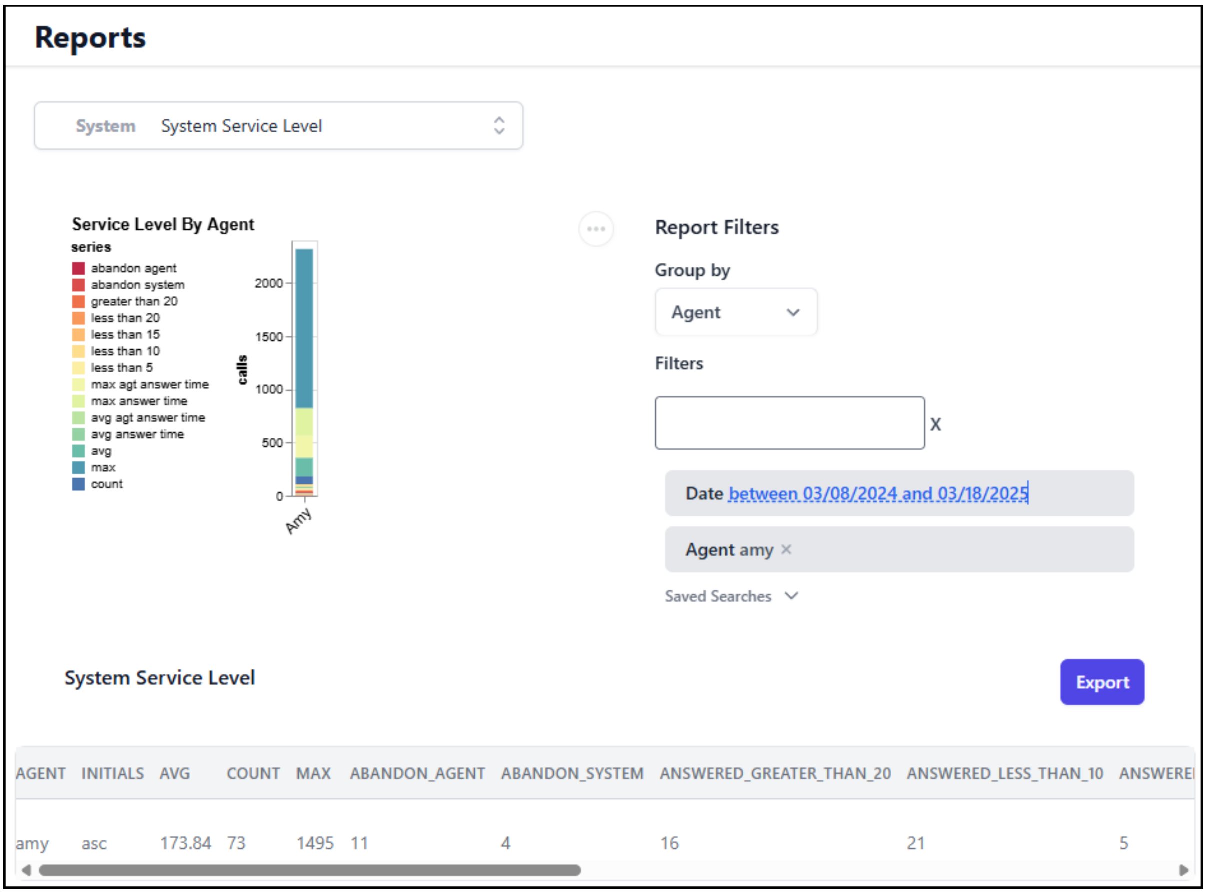
- The Service Level category that the section represents

- The percentage of the total calls that the section represents
- The number of calls that the section represents

System Service Level Table

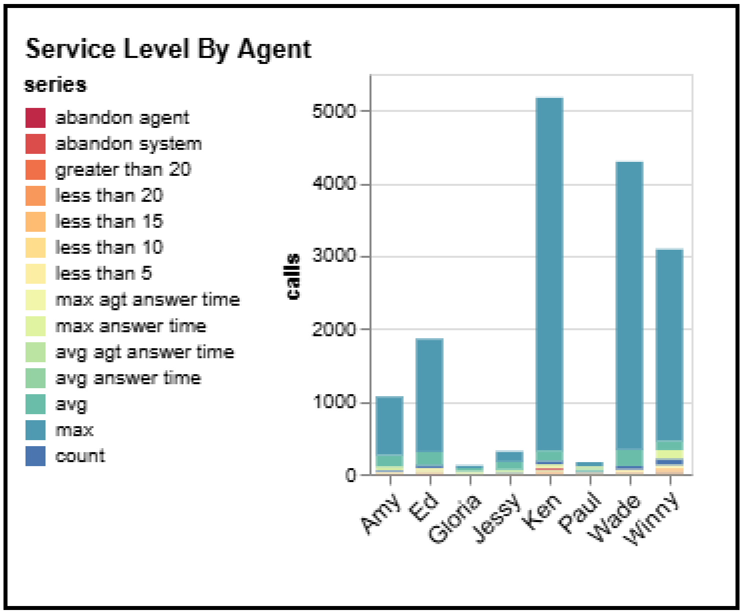
The System Service Level table displays information related to service quality in the system. When the Group By field is set to “None” for the System Service Level report, the System Service Level table displays a single row which represents service statistics for the entire system.

System Service Level Report (Grouped by Agent)



When the Group By field for the System Service Level is set to “Agent,” the Service Level By Agent chart and the System Service Level table is displayed.

Service Level By Agent Chart



The Service Level By Agent graph displays a bar for each agent who took calls in the dataset. The left side of the Service Level By Agent graph displays either call count or call percentage intervals, depending on the configuration of the widget properties.

The Service Levels By Agent legend indicates which Service Level category is assigned to each color.

Each bar is broken into colored segments by the Service Level represented. The height of each section represents either the number of calls or the percentage of calls for agents that fit the Service Level category, depending on the configuration of the widget properties.

Bar sections are organized vertically from largest to smallest with sections that represent a greater number or proportion of calls appearing higher in the graph and sections that represent a lesser number or proportion of calls appearing lower.

Tooltips

A tooltip is provided for each bar segment.

To display the tooltip for a segment, hover over an area on the Service Level By Agent graph.

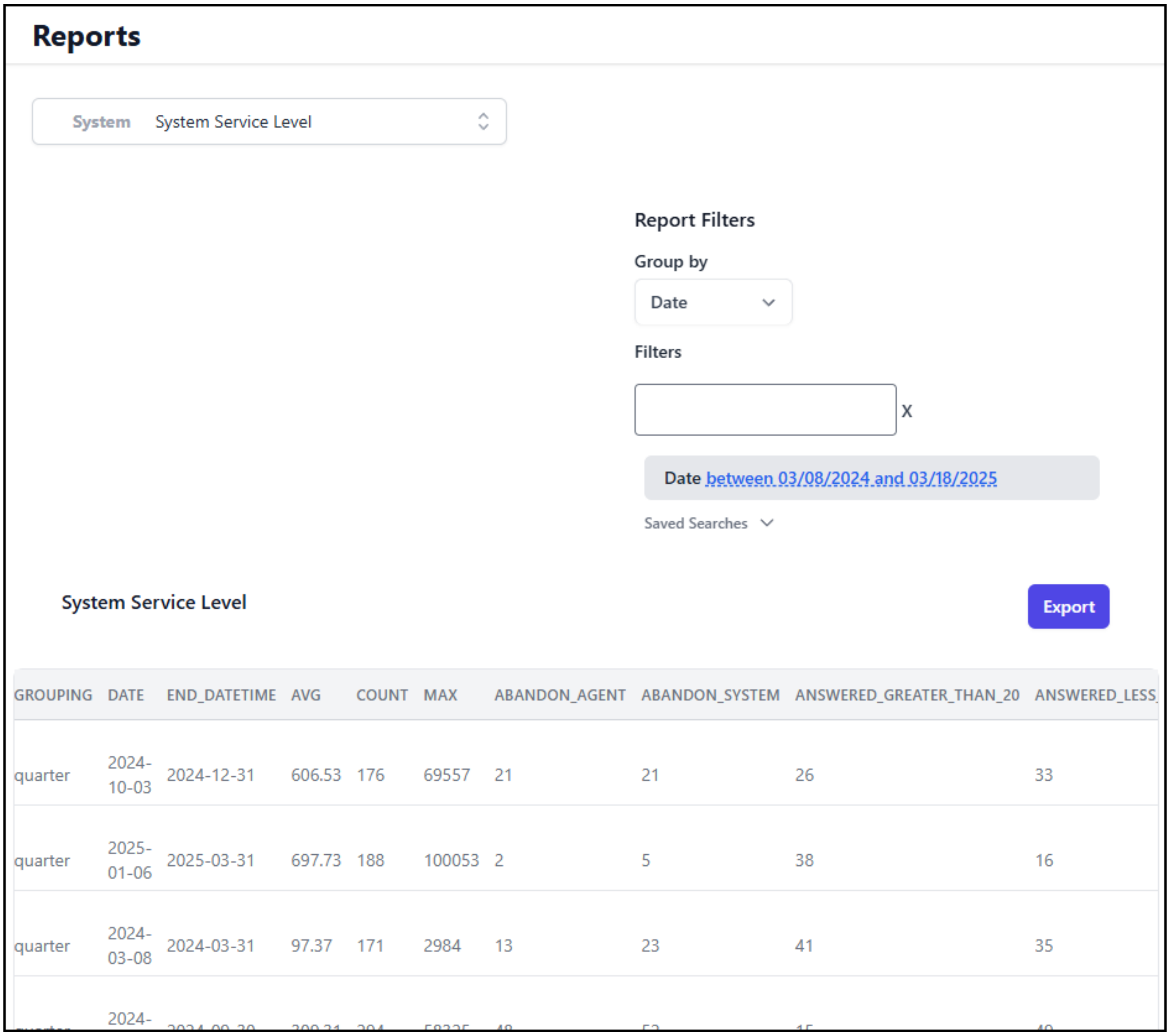
The tooltip displays the following information about the segment:

- The agent for which the segment displays data
- The Service Level category that the segment represents
- The number of calls that the segment represents
- The percentage of calls for the agent that were answered within 20 seconds
- The percentage of calls for the agent that were abandons of any type
- The percentage of calls for the agent that the segment represents

System Service Level Table

The System Service Level table displays information related to service quality in the system. When the Group By field is set to “Agent” for the Call Metrics report, the Call Metrics table displays a row for each Agent for which statistics are being displayed.

System Service Level Report (Grouped by Date)



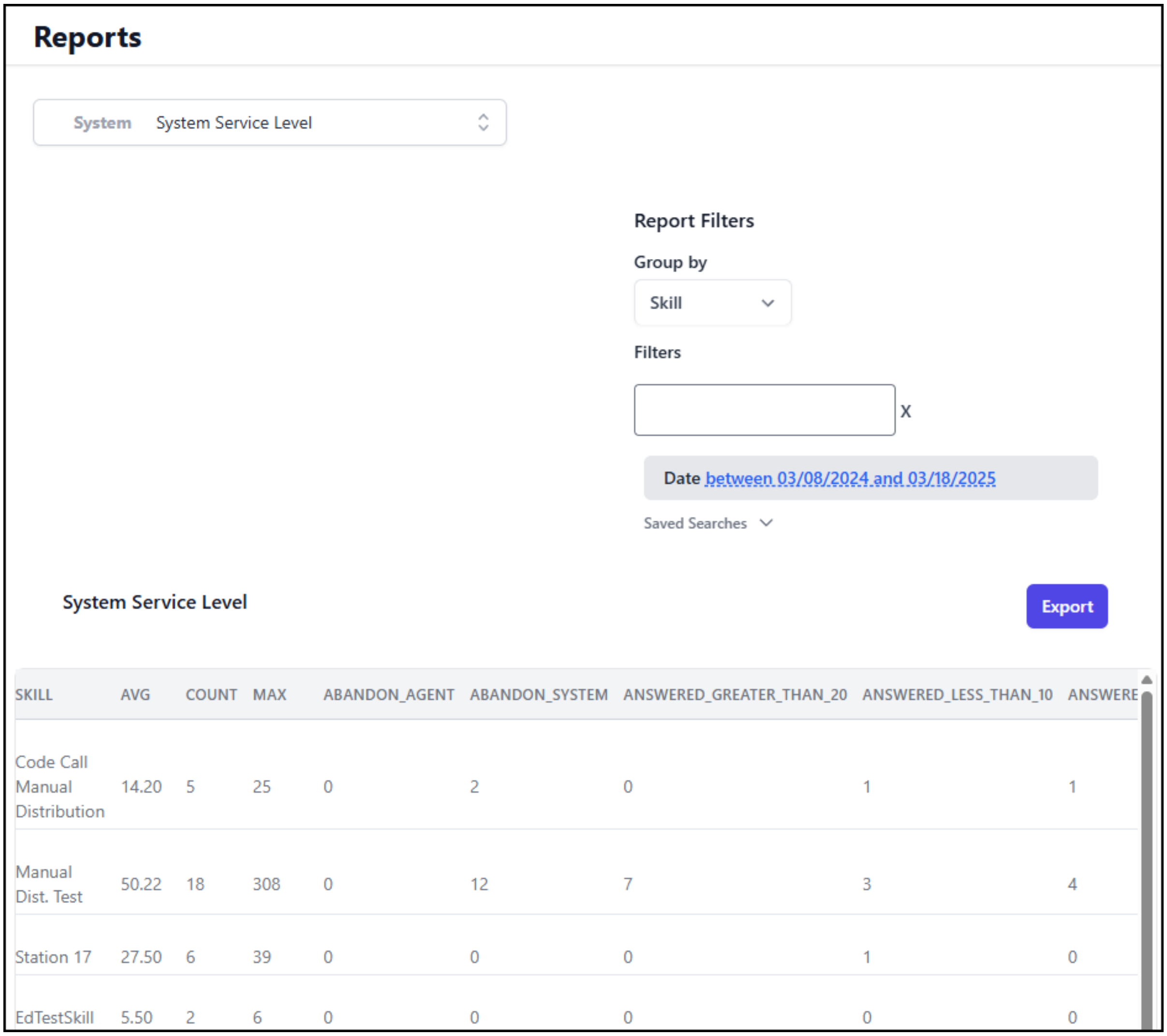
GROUPING	DATE	END_DATETIME	AVG	COUNT	MAX	ABANDON_AGENT	ABANDON_SYSTEM	ANSWERED_GREATER_THAN_20	ANSWERED_LESS
quarter	2024-10-03	2024-12-31	606.53	176	69557	21	21	26	33
quarter	2025-01-06	2025-03-31	697.73	188	100053	2	5	38	16
quarter	2024-03-08	2024-03-31	97.37	171	2984	13	23	41	35
	2024-								

When the Group By field for the System Service Level report is set to “Date,” the System Service Level table is displayed.

System Service Level Table

The System Service Level table displays information related to service quality in the system. When the Group By field is set to “Date” for the System Service Level report, the System Service Level table displays a row for each section of time for which statistics are displayed.

System Service Level Report (Grouped by Skill)



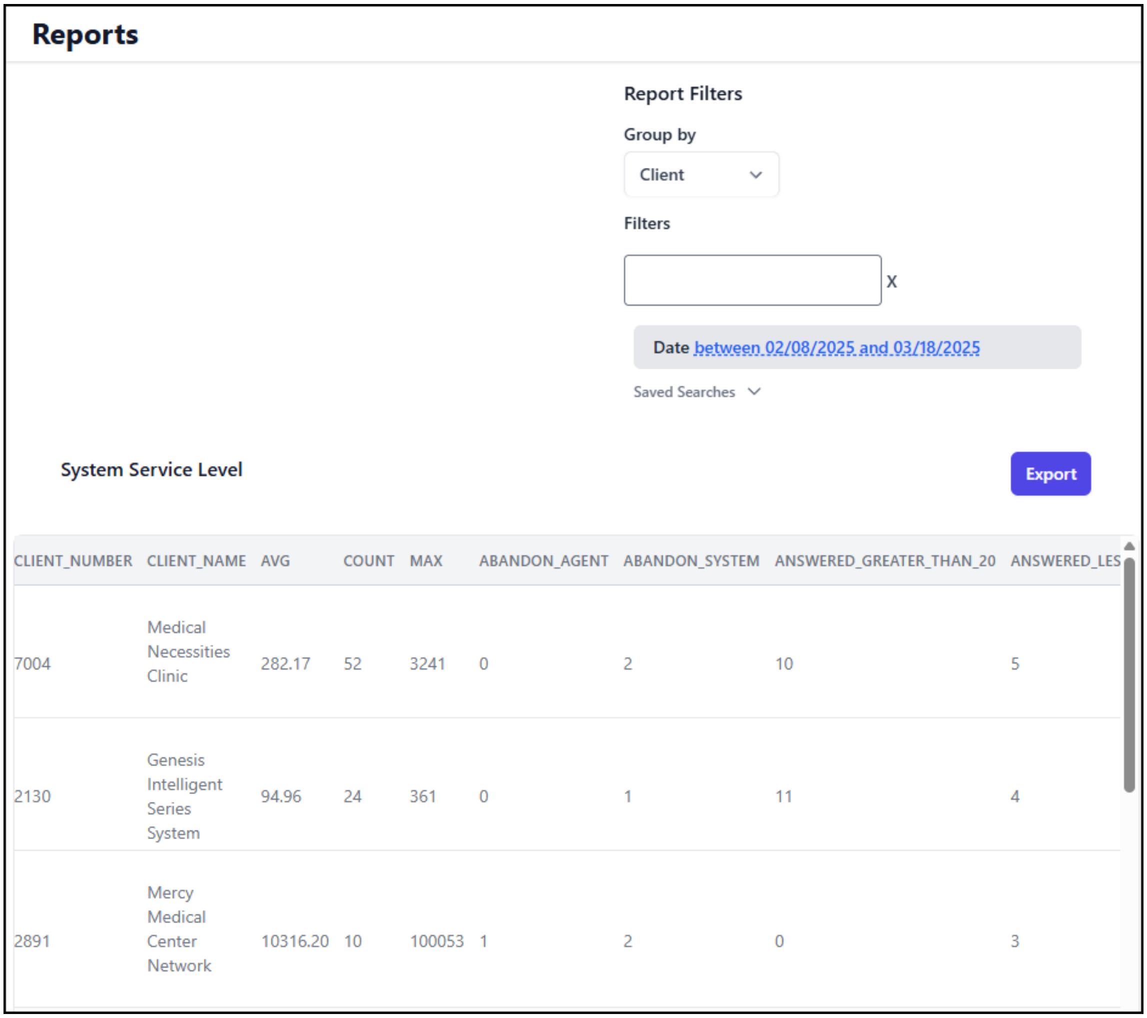
SKILL	AVG	COUNT	MAX	ABANDON_AGENT	ABANDON_SYSTEM	ANSWERED_GREATER_THAN_20	ANSWERED_LESS_THAN_10	ANSWERE
Code Call Manual Distribution	14.20	5	25	0	2	0	1	1
Manual Dist. Test	50.22	18	308	0	12	7	3	4
Station 17	27.50	6	39	0	0	0	1	0
EdTestSkill	5.50	2	6	0	0	0	0	0

When the Group By field for the System Service Level report is set to “Skill,” the System Service Level table is displayed.

System Service Level table

The System Service Level table displays information related to service quality in the system. When the Group By field is set to “Skill” for the System Service Level report, the System Service Level table displays a row for each Automated Call Distribution (ACD) Skill for which statistics are displayed.

System Service Level Report (Grouped by Client)



CLIENT_NUMBER	CLIENT_NAME	AVG	COUNT	MAX	ABANDON_AGENT	ABANDON_SYSTEM	ANSWERED_GREATER_THAN_20	ANSWERED_LES
7004	Medical Necessities Clinic	282.17	52	3241	0	2	10	5
2130	Genesis Intelligent Series System	94.96	24	361	0	1	11	4
2891	Mercy Medical Center Network	10316.20	10	100053	1	2	0	3

When the Group By field for the System Service Level report is set to “Client,” the System Service Level table is displayed.

System Service Level Table

The System Service Level table displays information related to service quality in the system. When the Group By field is set to “Client” for the System Service Level report, the System Service Level table displays a row for each Client for which statistics are displayed.

System Service Level Columns

The System Service Level table displays statistics related to service quality in the system. The System Service Level table displays rows based on the option selected for the Group By field for the System Service Level report.

Each System Service Level table displays a column for each statistic being presented. In addition to these statistics, each System Service Level table may contain one or more additional columns depending on what option is selected for the Group By field for the System Service Level report. These additional columns are displayed to the left of the base System Service Level statistics.

Each System Service Level table includes a column for each of the following statistics:

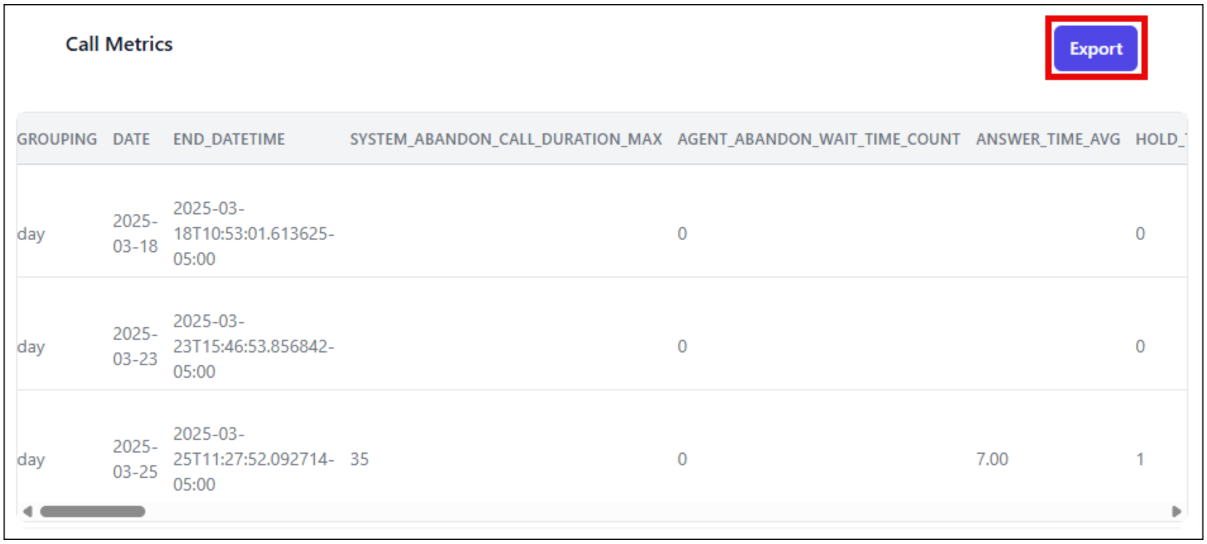
Column	Description
Agent *Group by Agent*	When the Group By parameter is set to "Agent," the Agent column is shown. The Agent column displays the name of the agent for whom statistics are displayed.
Initials *Group by Agent*	When the Group By parameter is set to "Agent," the Initials column is shown. The Initials column displays the initials of the agent for whom statistics are displayed, as configured in the IS System.
Grouping *Group by Date*	When the Group By parameter is set to "Date," the Grouping column is shown. The Grouping column displays the size of the segment of time for which statistics are displayed in the row. The Grouping column displays "day," "month," "quarter," or "year," depending on the size of the segment of time selected in the Date filter under the Report Filters section. • "day" is displayed if the Date filter contains a range fewer than 30 days. • "month" is displayed if the Date filter contains a range greater than or equal to 30 days but fewer than 90 days. • "quarter" is displayed if the Date filter contains a range greater than or equal to 90 days but fewer than 365 days. "year" is displayed if the Date filter contains a range greater than or equal to 365 days.
Date *Group by Date*	When the Group By parameter is set to "Date," the Date column is shown. The Date column displays the starting date for which statistics are displayed in the row.
End_DateTime *Group by Date*	When the Group By parameter is set to "Date," the End_DateTime column is shown. The End_DateTime column displays the ending date and time for which statistics are displayed in the row.
Skill *Group by Skill*	When the Group By parameter is set to "Skill," the Skill column is shown. The Skill column displays the ACD Skill for which statistics are displayed.
Client_Number *Group by Client*	When the Group By parameter is set to "Client," the Client_Number column is shown. The Client_Number column displays the unique Client Number which represents the Client for whom statistics are displayed in the row.

System Service Level

Column	Description
Client_Name *Group by Client*	When the Group By parameter is set to “Client,” the Client_Name column is shown. The Client_Name column displays the name of the Client for whom statistics are displayed in the row.
Avg	The Avg column displays the average duration of calls in seconds.
Count	The Count column displays the number of calls for which data is displayed.
Max	The Max column displays the greatest duration of calls in seconds.
Abandon_Agent	The Abandon_Agent column displays the total number of calls in which the caller hung up after the call was distributed to an agent but before the call was answered.
Abandon_System	The Abandon_System column displays the total number of calls in which the caller hung up without the call being assigned to an agent.
Answered_Greater _Than_20	The Answered_Greater_Than_20 column displays the number of calls in which the call was in the Ring state for more than 20 seconds.
Answered_Less _Than_10	The Answered_Less_Than_10 column displays the number of calls in which the call was in the Ring state for less than 10 seconds.
Answered_Less _Than_15	The Answered_Less_Than_15 column displays the number of calls in which the call was in the Ring state for less than 15 seconds
Answered_Less _Than_20	The Answered_Less_Than_20 column displays the number of calls in which the call was in the Ring state for less than 20 seconds.
Answered_Less _Than_5	The Answered_Less_Than_5 column displays the number of calls in which the call was in the Ring state for less than 5 seconds.
Avg_Agt_Answer _Time	The Avg_Agt_Answer column displays the average number of seconds for which calls were in the Ring state before being answered by an agent.
Avg_Answer_Time	The Avg_Answer_Time column displays the average number of seconds from when the call entered the system to when it was answered by an agent.

Column	Description
Max_Agt_Answer_Time	The Max_Agt_Answer_Time column displays the greatest number of seconds the call was in the Ring state for calls which were answered by an agent.
Max_Answer_Time	The Max_Answer_Time column displays the greatest number of seconds from when a call entered the system to when it was answered by an agent.

Exporting Reports



GROUPING	DATE	END_DATETIME	SYSTEM_ABANDON_CALL_DURATION_MAX	AGENT_ABANDON_WAIT_TIME_COUNT	ANSWER_TIME_AVG	HOLD_
day	2025-03-18	2025-03-18T10:53:01.613625-05:00		0		0
day	2025-03-23	2025-03-23T15:46:53.856842-05:00		0		0
day	2025-03-25	2025-03-25T11:27:52.092714-05:00	35	0	7.00	1

The Agent Score, Audit Log, Call Metrics, and System Service Level tables include an Export button located to the right of the table title. The Export button is used to start the export of data contained within the table into a CSV file.

To export the data displayed in the Agent Score table, Audit Log table, Call Metrics table, or the System Service table:

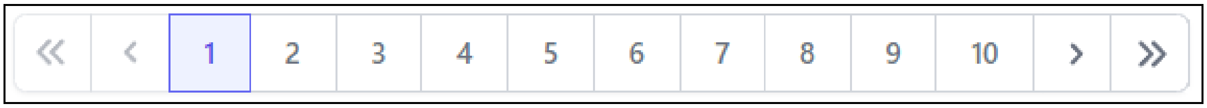
1. **Select the Report for which you would like data exported.**
2. **Use the Report Filters section to change what data is displayed and how it is organized.**
3. **Click the Export button.**

   The Active Insights platform begins generating a CSV file containing the data represented by the table.

Once the file is generated, it can be downloaded from the User Downloads page.

Appendix A—Table Navigation

Table navigation bars are used to change which page of listings you are viewing. Each table navigation bar includes a First (<<) button, a Previous (<) button, a Next (>) button, a Last (>>) button, and a series of Page buttons determined by the amount of listings, up to a maximum of 10.



Page

The Page buttons are used to select what page of results you would like to view. The number of Page buttons displayed is determined by the number of pages of available listings, up to a maximum of 10 Page buttons. Page buttons are labeled in ascending order with a number representing the page of listings to which it navigates.

To display a specific page of listings, click the corresponding page number.

First (<<)

The First button is used to display the first page of results. This button has no effect if you are currently viewing the first page of listings.

To display the first page of listings, click the First (<<) button.

Previous (<)

The Previous button is used to display the page of search results with a page number one lower than the current page. This button has no effect if you are currently viewing the first page of listings.

To display the previous page of listings, click the Previous (<) button.

Next (>)

The Next button is used to display the page of search results with a page number one higher than the current page. This button has no effect if you are currently viewing the last page of listings.

To display the next page of listings, click the Next (>) button.

Last (>>)

The Last button is used to display the last page of results. This button has no effect if you are currently viewing the last page of listings.

To display the last page of listings, click the Last (>>) button.

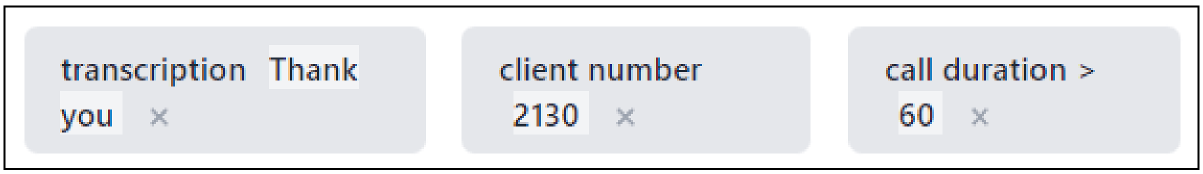
Appendix B—Filters

Filters are used to limit the information displayed by the selected report. Filters are created by selecting a search parameter and adding one or more values to allow through the filter. Some search parameters have unique methods for selecting one or more values.

Multiple filters can be active at one time, but each search parameter can only be used by one active filter for the table. Attempting to create a filter with a search parameter that is already used by an active filter will remove the active filter and replace it with the new filter.

Active Filters

All active filters are applied cumulatively and only results that meet all active filters are displayed.



A Filter pane is displayed near the Filter field for each filter that is active for the list. Each Filter pane displays the search parameter, the value, and a Remove icon.

Adding a Filter

Each filter requires a search parameter and a value. The search parameter determines what data type is being filtered. The value determines what value of the data type is allowed through the filter.

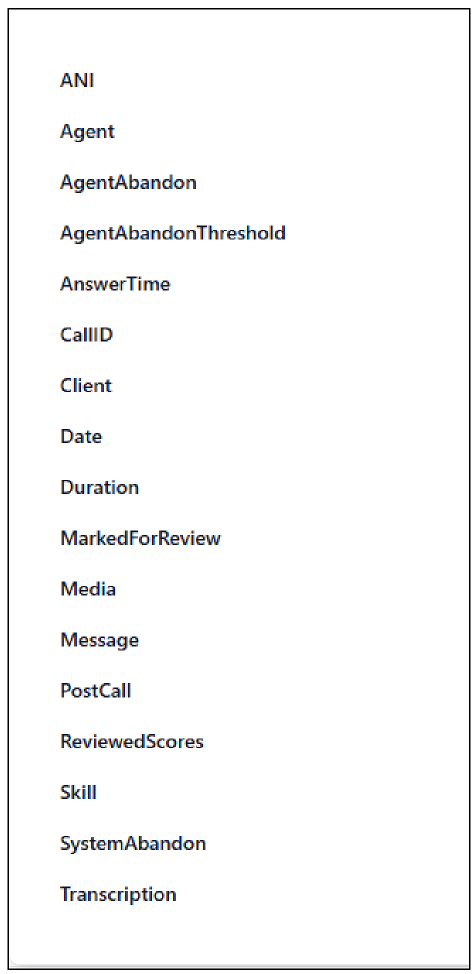
To create a filter, click the Filters field.

A menu of available search parameters for the data is displayed.

Select a search parameter.

A menu is displayed for the search parameter. The menu displays one or more fields for setting values for the search parameter. Some search parameters have more than one method of setting values.

Enter the value or values according to the search parameter. The filter is applied to the data, and a Filter pane for the filter is displayed.



Removing a Filter

A filter limits the listings displayed in a table as long as it is active. Filters can be deactivated and removed using the Remove icon.

To remove a filter, click the Remove icon to the right of the filter.

The filter is removed, and the data is no longer limited by the removed filter.

Modifying a Filter

Filters that contain a hyperlink can be modified without deleting the filter.

To modify a filter, click the hyperlink in the filter.

The filter pane is displayed.

Edit the filter similar to how the filter would be added.

The Filter pane is updated to display the new search parameters.

Search Parameters

Search parameters are used to filter report data on the Reports page. Some search parameters have unique methods for adding values or filtering data.

Only certain search parameters are available for the Reports page. The following search parameters may be used to filter a table in Active Insights:

Parameter	Description
ANI	The ANI search parameter is used to display dashboard data or call listings associated with the selected Automatic Number Identification (Caller ID) phone number.
Agent	The Agent search parameter is used to display dashboard data, call listings, or message listings associated with the selected agent Login Name.
Agent Abandon	The Agent Abandon search parameter is used to display call listings based on whether the caller hung up after the call was assigned to an agent but before the agent answered the call.
Agent Abandon Threshold	The Agent Abandon Threshold search parameter is used to display call listings based on the number of seconds between when the call was assigned to an agent and when the caller hung up before the call was answered.
Answer Time	The Answer Time search parameter is used to display dashboard data or call listings based on how long it took for the call to be answered.
Call ID	The Call ID search parameter is used to display the call listing with the unique Call ID number entered.
Client	The Client search parameter is used to display storage listings, dashboard data, call listings, or message listings associated with the selected Client or any Client in the selected range.
Date	The Date search parameter is used to display storage listings, dashboard data, or call listings for Clients that have stored call information within the selected date range.
Duration	The Duration search parameter is used to display call listings based on the duration of the call.

Parameter	Description
Marked For Review	The Marked For Review search parameter is used to display call listings based on whether the listing has been marked for review.
Media	The Media search parameter is used to display call listings based on whether the listing includes specific types of media.
Message	The Message search parameter is used to display call listings with associated messages or message listings that contain the entered text.
Post Call	The Post Call search parameter is used to display call listings based on a Post Call Analytics information.
Reviewed Scores	The Reviewed Scores search parameter is used to display call listings based on whether the listing has been reviewed.
Skill	The Skill search parameter is used to display dashboard data and call listings that were assigned to the selected Automated Call Distribution (ACD) Skill.
System Abandon	The System Abandon search parameter is used to display call listings based on whether the caller hung up when the call was not assigned to an agent.
Transcription	The Transcription search parameter is used to display call listings with call transcriptions that contain the entered text.

Instructions for creating a filter for each search parameter are provided on the following pages.

To cancel creating a filter at any point in the process, click the Cancel icon X next to the Search field.

The search parameter menu is closed and the Search field is cleared.

Note: Clicking the Cancel icon X in the Search field does not remove any filters that have already been created.

ANI

The ANI search parameter is used to display report data associated with the selected Automatic Number Identification (Caller ID) phone number.

To create a filter using the ANI search parameter, select the ANI search parameter.

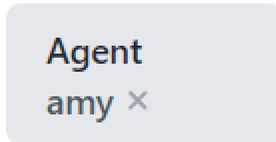
An ANI field is displayed.

Enter the phone number that you would like used with the ANI search parameter.

A Filter pane is displayed for the filter.

Only listings of calls associated with the selected ANI are displayed.

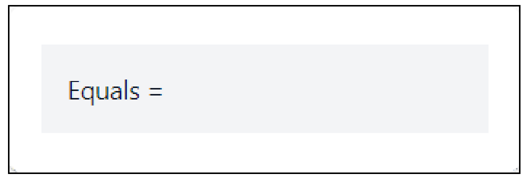
Agent



The Agent search parameter is used to display report data associated with the selected Agent.

To create a filter using the Agent search parameter, select the Agent search parameter.

The “Equals =” modifier is displayed.



Select the “Equals =” modifier.

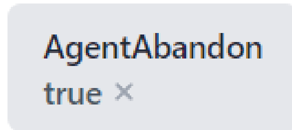
An equals (=) sign is added to the Search field, and a list of agents is displayed.

Select the Login Name of the agent that you would like used with the Agents search parameter.

A Filter pane is displayed for the filter.

Only data associated with selected agent are displayed.

Agent Abandon



The Agent Abandon search parameter is used to display report data based on whether the data is associated with a call in which the caller hung up after the call was assigned to an agent but before the call was answered by the agent.

To create a filter using the Agent Abandon search parameter, select the Agent Abandon search parameter.

The “Equals =” modifier is displayed.

Select the “Equals =” modifier.

The Search field is selected.

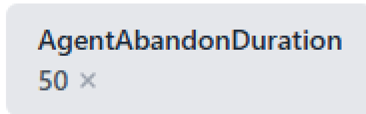
To display calls that were agent abandons, type “true.”
OR
To display calls that were not agent abandons, type “false.”

Press the ENTER key.

A Filter pane is displayed for the filter.

Only data for calls that either were or weren’t agent abandons are displayed.

Agent Abandon Duration



The Agent Abandon Duration search parameter is used to display report data based on the number of seconds between when the associated call entered the system and when the caller hung up for calls which were distributed to an agent but the caller hung up before the call was answered.

To create a filter using the Agent Abandon Duration search parameter, select the Agent Abandon Duration search parameter.

The “Less than <” and “Greater than >” modifiers are displayed.

To search for calls with an agent abandon duration less than a certain value, select “Less than <.”
OR
To search for calls with an agent abandon duration greater than a certain value, select “Greater than >.”

A Less-Than sign (<) or a Greater-Than sign (>) is displayed in the Search field, and the Search field is selected.

Enter the value to which you would like the agent abandon duration compared.

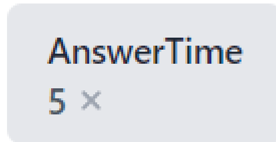
Press the ENTER key.

A Filter pane is displayed for the filter.

Only data for calls with an agent abandon duration greater than or less than the entered value are displayed.

Note: Agent abandon duration values equal to the selected value are not displayed.

Answer Time



The Answer Time search parameter is used to display report data based on how long it took for the calls to be answered.

Note: The Dashboard uses the Answered filter. The Answered filter has the same functionality.

To create a filter using the Answer Time search parameter, select the Answer Time search parameter.

A list of modifiers is displayed.

The “Less than <” and “Greater than >” modifiers are displayed

To search for calls with an answer time less than a certain value, select “Less than <.”
OR
To search for calls with an answer time greater than a certain value, select “Greater than >.”

A Less-Than sign (<) or a Greater-Than sign (>) is displayed in the Search field, and the Search field is selected.

Enter the value to which you would like the call answer times compared.

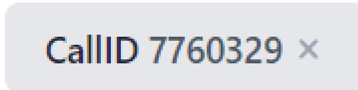
Press the ENTER key.

A Filter pane is displayed for the filter.

Only data for calls with an answer time greater than or less than the entered value are displayed.

Note: Answer time values equal to the selected value are not displayed.

Call ID



The Call ID search parameter is used to display the report data associated with the call with the unique Call ID number entered.

To create a filter using the Call ID search parameter, select the Call ID search parameter.

A Call ID field is displayed.

Enter the Call ID number that you would like used with the Call ID search parameter.

A Filter pane is displayed for the filter.

Only data for the call with the matching Call ID is displayed.

Client

The Client search parameter is used to display report data associated with an individual Client, a Client within a range of Clients, or a Client belonging to a Client Group.

To create a filter using the Client search parameters, select the Client search parameter.

The Client pane is displayed

The Client pane contains the Single Client tab, the Client range tab, and the Client Group tab. The Single Client tab is selected by default.

Single Client

The Single Client tab is used to select and create a filter for an individual Client. The Single Client tab contains the Client field.

To display listings associated with an individual Client listings:

- **Select the Client field.**

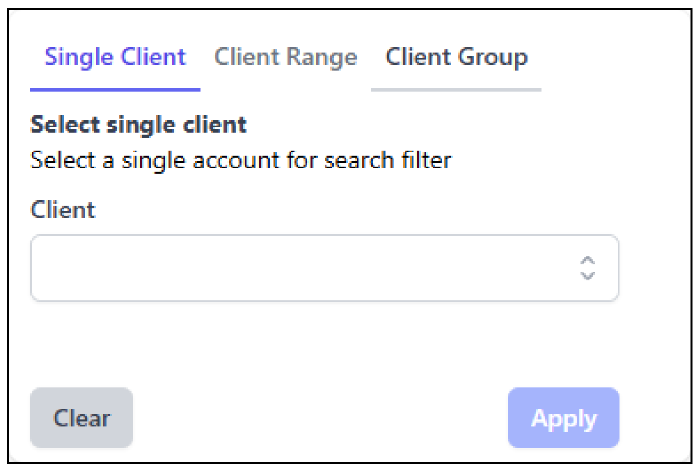
  The Client list is displayed.

- **Select the desired Client.**

- **To create a filter for the Client, click the Apply button below the Client field.**
  OR
  To cancel creating a Client filter, click the Clear button.

  If Apply was selected, a Filter pane is displayed for the filter.

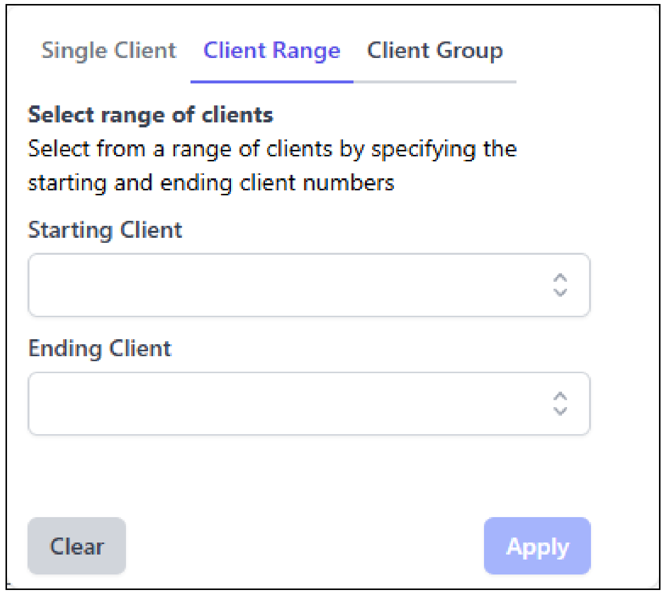
  Only listings associated with the selected Client are displayed.



Client Range

The Client Range tab is used to select and create a filter for a range of Clients. The Client Range tab contains the Starting Client field and the Ending Client field.

To display listings or data associated with any Clients within a range of Client Numbers:



- **Select the Start Client field.**

  The Client list is displayed.

- **Select the first Client in the range of Clients you would like displayed.**
- **Select the End Client field.**

  The Client list is displayed.

- **Select the last Client in the range of Clients you would like displayed.**
- **To create a filter for the Client range, click the Apply button below the Client field.**
  OR
  To cancel creating a Client filter, click the Clear button.

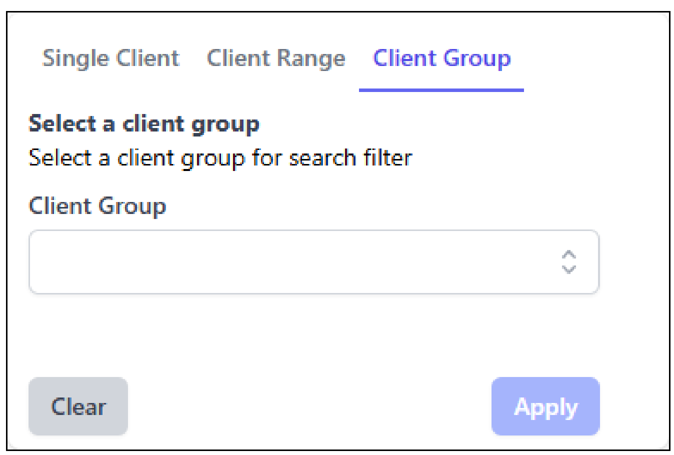
  If Apply was selected, a Filter pane is displayed for the filter.

  Only listings associated with Clients within the selected range are displayed.

Client Group

The Client Group tab is used to select and create a filter for a Client Group created on the Client Configuration page. The Client Group tab contains the Client Group field.

To display listings or data associated with Clients included in a Client Group:



- **Select the Client Group field.**

  The Client Group list is displayed.

- **Select the desired Client Group.**
- **To create a filter for the Client Group, click the Apply button below the Client field.**
  OR
  To cancel creating a Client filter, click the Clear button.

  If Apply was selected, a Filter pane is displayed for the filter.

  Only listings associated with the Clients included in the selected Client Group are displayed.

Date

The Date search parameter is used to display report data for Clients that have stored call information within the selected date range.

To create a filter using the Date search parameter, select the Date search parameter.

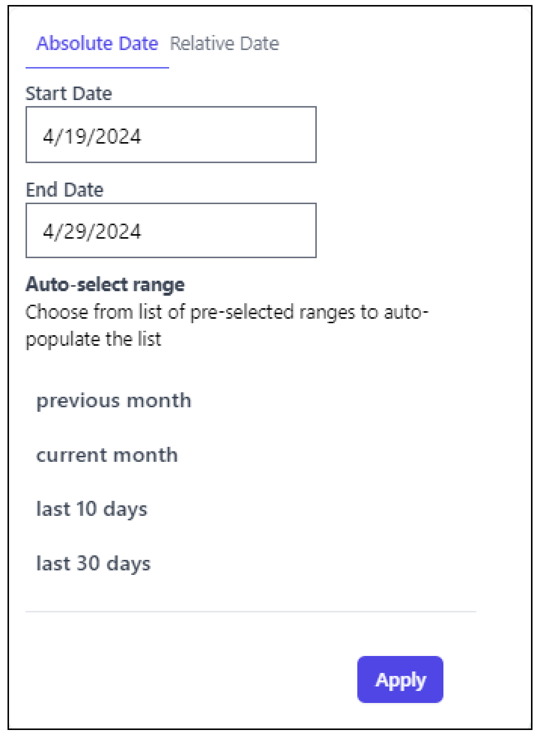
The Date parameter contains an Absolute Date tab and a Relative Date tab.

Absolute Date

The Absolute Date tab is used to display listings for a set date or date range. The Absolute Date tab contains the Start Date field, the End Date field, and the Auto-Select Range section.

To manually set a date range:

- **Enter the first date of the desired date range in the Start Date field in MM/DD/YYYY format.**
- **Enter the last date of the desired date range in the End Date field in MM/DD/YYYY format.**



To use an Auto-Select Range:

- **Click a hyperlink in the Auto-Select Range section.**
- If “Previous Month” is selected, the Start Date is populated with the first date of the previous month and the End Date is populated with the last date of the previous month.
- If “Current Month” is selected, the Start Date is populated with the first date of the current month, and the End Date is populated with the last date of the current month.
- If “Last 10 days” is selected, the Start Date is populated with the date that occurred 10 days previous, and the End Date is populated with the current date.
- If “Last 30 days” is selected, the Start Date is populated with the date that occurred 30 days previous, and the End Date is populated with the current date.

Click the Apply button.

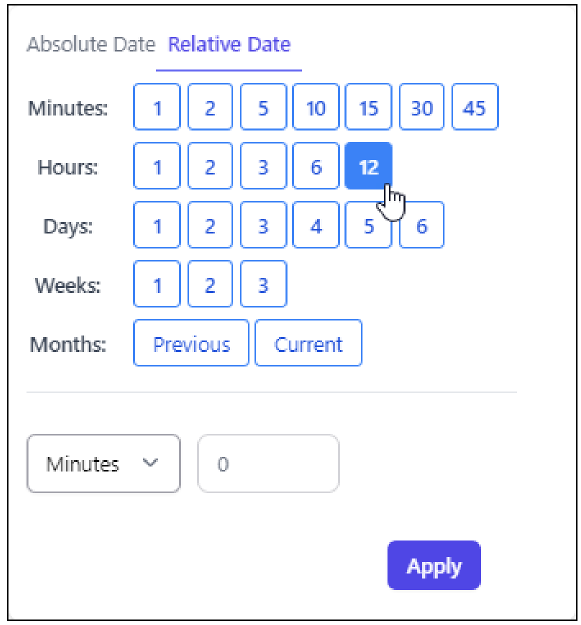
The date range is displayed in the filter, and only data associated with calls that occurred within the data range is displayed.

Relative Date

The Relative tab is used to display listing for an amount of time relative to the current day. The Relative Date tab contains a series of preset relative date and time buttons, a Units menu, and a Value field.

To choose a preset relative date or time, select the button with the number of the unit of time by which you would like the panel filtered.

The amount of time selected is displayed, and the panel is filtered to display information for that amount of time before the current date or time up to the present.

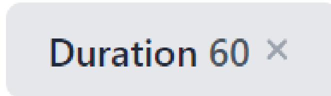


To manually set a relative date or time:

- **Select a unit of time in the Units menu.**
- **Enter the number of the selected units for which you would like information displayed previous to the current date or time.**
- **Click the Apply button.**

  The amount of time selected is displayed, and only data associated with calls that occurred within that amount of time before the current date or time up to present are displayed.

Duration



The Duration search parameter is used to display report data depending on the associated call's duration.

To create a filter using the Duration search parameter, select the Duration search parameter.

A list of modifiers is displayed.

The "Less than <" and "Greater than >" modifiers are displayed

To search for calls with a duration in sections less than a certain value, select "Less than <."
OR
To search for calls with a duration in sections time greater than a certain value, select "Greater than >."

A Less-Than sign (<) or a Greater-Than sign (>) is displayed in the Search field, and the Search field is selected.

Enter the value to which you would like the call answer times compared.

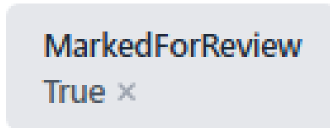
Press the ENTER key.

A Filter pane is displayed for the filter.

Only data associated with calls with a duration greater than or less than the entered value are displayed.

Note: Duration values equal to the selected value are not displayed.

Marked For Review



The Marked For Review search parameter is used to display report data associated with call listings that have been marked for review.

To create a filter using the Marked For Review search parameter, select the Marked For Review search parameter.

The “Equals =” modifier is displayed.

Select the “Equals =” modifier.

The “MarkedForReview =” prefix is displayed in the Search field, and the “True” and “False” values are displayed.

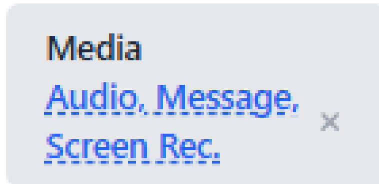
To display calls that are marked for review, select “True.”
OR
To display calls that are not marked for review, select “False.”

Note: Calls which were marked for review but were then marked as Reviewed are displayed when the Marked For Review filter is set to False.

A Filter pane is displayed for the filter.

Only data associated with listings that either are or are not marked for review are displayed.

Media



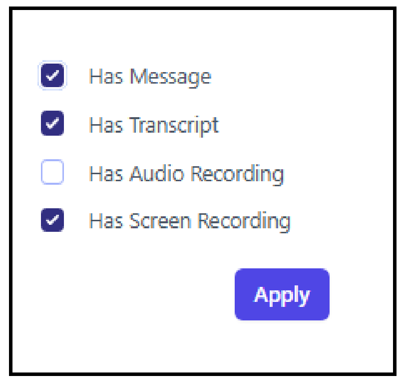
The Media search parameter is used to display report data associated with call listings that contain specific types of media.

To create a filter using the Media search parameter, select the Media search parameter.

The “Media” modifier is displayed, and a check box is displayed for each type of media by which the listings can be filtered.

Select the check box next to each media type you would like displayed call listings to include.

The following check boxes are available:



Has Message

If the “Has Message” check box is selected, only call listings which have messages are displayed.

Has Transcript

If the “Has Transcript” check box is selected, only call listings which have transcripts are displayed.

Has Audio Recording

If the “Has Audio Recording” check box is selected, only call listings which have audio recordings are displayed.

Has Screen Recording

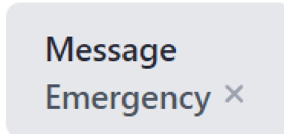
If the “Has Audio Recording” check box is selected, only call listings which have screen recordings are displayed.

To create the filter, click the Apply button.

A Filter pane is displayed for the filter.

Only data associated with call listings that contain all of the selected media types are displayed.

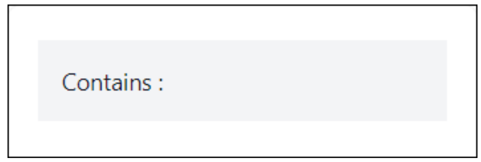
Message



The Message search parameter is used to display report data for calls with associated messages that contain the entered text.

To create a filter using the Message search parameter, select the Message search parameter.

The “Contains :” modifier is displayed



Select the “Contains :” modifier.

The “Message :” prefix is displayed in the Search field, and the Search field is selected.

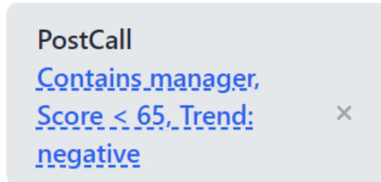
Enter the text you would like used with the Message search parameter in the Search field after the “Message :” prefix.

Press the ENTER key.

A Filter pane is displayed for the filter.

Only data for calls with associated messages that contain the entered text are displayed.

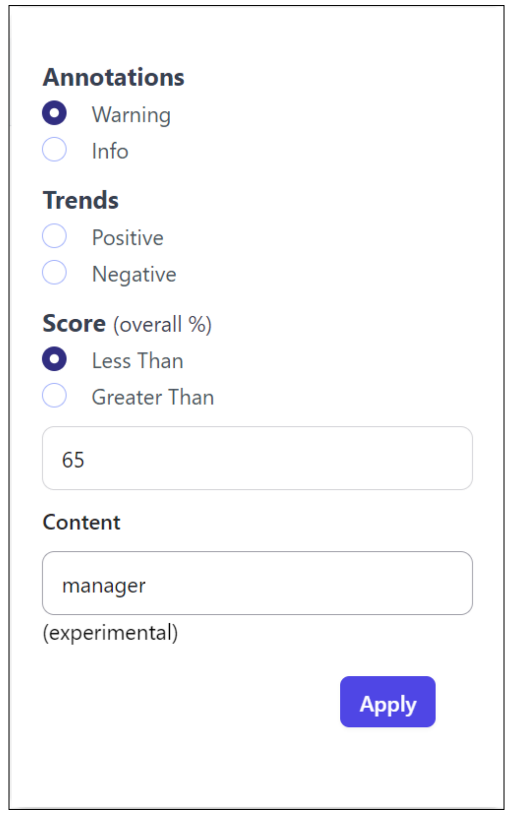
Post Call



The Post Call search parameter is used to display report data based on the Post Call Analytics data given to calls.

To create a filter using the Post Call search parameter, select the Post Call search parameter.

The Post Call menu is displayed.



The Post Call menu contains options that determine how the Post Call search parameter filters call listings. The filter pane contains the Annotations, Trends, Score and Content categories.

Multiple categories can be customized for the filter. When values are selected or entered for multiple categories, only call listings for calls that match all categories are displayed.

Select options or enter values for any categories by which you would like call listings filtered.

Annotations

The Annotations category is used to filter call listings based on whether an annotation was given to the call and the type of annotation. Only one Annotations option can be selected.

To filter call listings by the annotation given to the call, select an option under the Annotations category.

Warning

If “Warning” is selected, only call listings for calls which were given a warning annotation are displayed.

Info

If “Info” is selected, only call listings for calls which were given an info annotation are displayed.

Trends

The Trends category is used to filter call listings based on whether a trend was given to the call and the type of trend. Only one Trends option can be selected.

To filter call listings by trend given to the call, select an option under the Trends category.

Positive

If “Positive” is selected, only call listings for calls which were given a positive trend are displayed.

Negative

If “Negative” is selected, only call listings for calls which were given a negative trend are displayed.

Content

The Content field is used to only display call listings which contain one or more words entered in the Content field. A call listing is displayed if a match is found in the post call analytics section, the call and message data lists, or the call transcript.

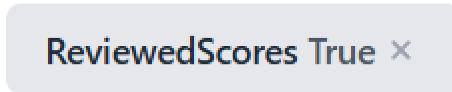
Note: Multiple words may be entered in the Content field, separated by spaces. If multiple words are entered in the Content field, call listings are displayed if call data for the call contains any of the words entered.

To apply the filter with the configurations made to the Annotations, Trends, Score, and Content categories, click the Apply button.

A Filter pane is displayed for the filter.

Only data associated with calls that meet the configured criteria are displayed.

Reviewed Scores



The Reviewed Scores search parameter is used to display report data for call listings based on whether they have been reviewed.

To create a filter using the Reviewed Scores search parameter, select the Reviewed Scores search parameter.

The "Equals =" modifier is displayed.

Select the "Equals =" modifier.

The "ReviewedScores =" prefix is displayed in the Search field, and the "True" and "False" values are displayed.

To display calls that have are marked as reviewed, select "True."
OR
To display calls that are not marked as reviewed, select "False."

A Filter pane is displayed for the filter.

Only data associated with call listings that either are or are not marked as Reviewed are displayed.

Skill

The Skill search parameter is used to display dashboard report data for calls that were assigned to a specific Automated Call Distribution (ACD) Skill.

To create a filter using the Skill search parameter, select the Skill search parameter.

The “Equals =” modifier is displayed.

Select the “Equals =” modifier.

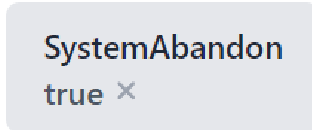
An equals sign is added to the Search field, and a list of ACD Skills are displayed.

Select the ACD Skill by which you would like call listings filtered.

A Filter pane is displayed for the filter.

Only data for calls assigned to the selected ACD Skill are displayed.

System Abandon



The System Abandon search parameter is used to display report data for call listings based on whether the caller hung up when the call was not assigned to an agent.

To create a filter using the System Abandon search parameter, select the System Abandon search parameter.

The “Equals =” modifier is displayed.

Select the “Equals =” modifier.

An equals sign (=) is added to the Search field, and the Search field is selected.

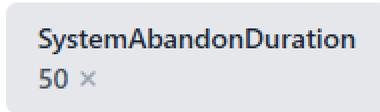
To display calls that were disconnected by the system, type “true.”
OR
To display calls that were not disconnected by the system, type “false.”

Press the ENTER key.

A Filter pane is displayed for the filter.

Only data for calls that either were or weren’t system abandons are displayed.

System Abandon Duration



The System Abandon Duration search parameter is used to display report data based on the number of seconds between when the call entered the system and when the caller hung up before the call was distributed to an agent.

To create a filter using the System Abandon Duration search parameter, select the System Abandon Duration search parameter.

The “Less than <” and “Greater than >” modifiers are displayed.

To search for calls with a system abandon duration less than a certain value, select “Less than <.”
OR
To search for calls with a system abandon duration greater than a certain value, select “Greater than >.”

A Less-Than sign (<) or a Greater-Than sign (>) is displayed in the Search field, and the Search field is selected.

Enter the value to which you would like the system abandon duration compared.

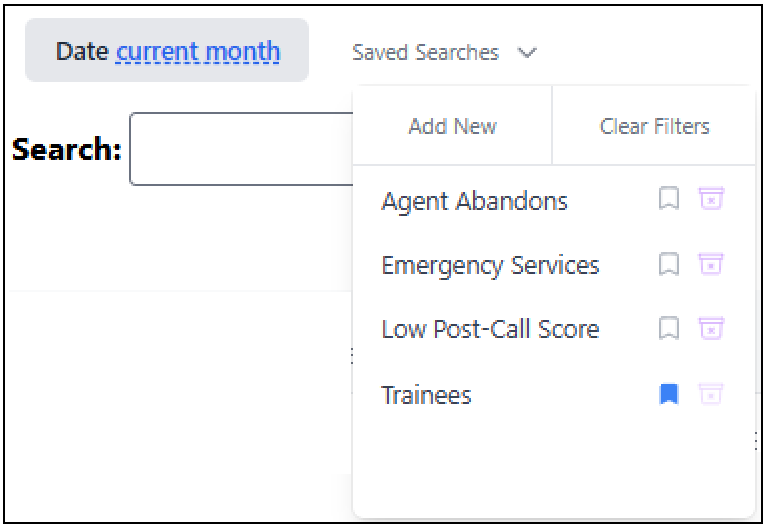
Press the ENTER key.

A Filter pane is displayed for the filter.

Only data for calls with a system abandon duration greater than or less than the entered value are displayed.

Note: System abandon duration values equal to the selected value are not displayed.

Appendix C—Saved Searches



The Saved Searches pane is used to access, manage, and select Saved Searches. Each saved Search contains one or more Filters. When a Saved Search is selected, the filters saved to the Saved Search are applied, and a Filter pane is displayed for each filter.

To open the Saved Searches pane, click the Saved Searches command.

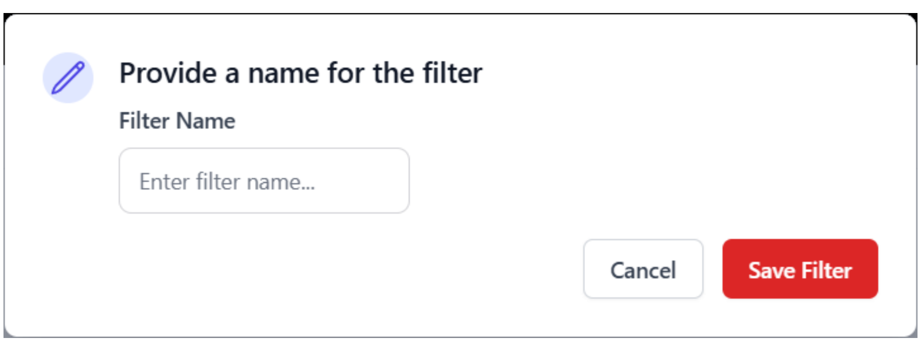
The Saved Searches pane contains a list of Saved Searches for each report on the Reports page.

The Saved Searches pane contains the Update command, the Add New button, the Clear Filters button, and the Saved Searches list.

Adding a New Saved Search

The Add New button is used to create a new Saved Search. The Add New button creates a new Saved Search based on the currently applied Filters.

To create a new Saved Search, create any filters you would like contained by the Saved Search, and then click the Add New button.



A Filter Name prompt is displayed.

Enter a name for the Saved Search in the Filter Name field.

Click the Save Filter button.
OR
To cancel creating the filter, click the Cancel button.

If the Save Filter button was clicked, the Saved Search is created.

Selecting a Saved Search

Saved Searches are used to quickly apply a saved set of filters.

To apply a Saved Search, click a Saved Search listing.

The filters saved to the Saved Search are applied.

Updating a Saved Search

Different filters can be assigned to the Saved Search using the Saved Searches pane.

To update the filters contained by a Saved Search, select a Saved Search.

The filters saved to the Saved Search are applied.

Add, remove, and edit the displayed filters.

Click the Saved Searches command.

The Saved Searches pane is displayed.

Click the Update command.

The displayed filters are saved to the selected Saved Search.

Clearing Filters

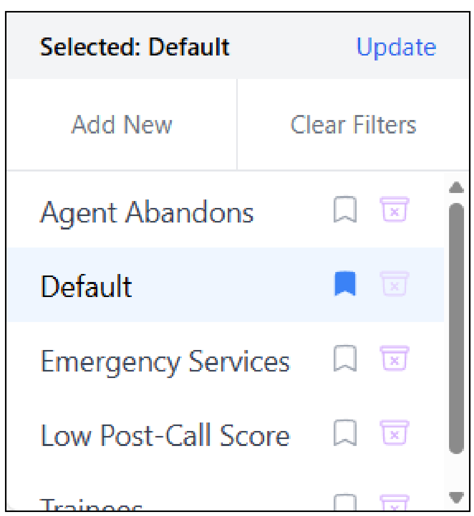
The Clear Filters button is used to clear the current filters.

To clear the current filters, click the Clear Filters button.

All filters except for the Date filter are removed.

Saved Searches

The Saved Searches list displays a list of Saved Searches. Each Saved Search listing contains a Default icon and a Remove icon.



Default

The Default icon is used to mark the Saved Search as default. If a Saved Search is marked as default, the filters contained by the Saved Search are loaded by default when the page containing the associated Search field is displayed.

Only one Saved Search can be marked as Default at once. If another Saved Search is marked as default, the original Saved Search is no longer marked as default, and the new Saved Search is marked as default.

To mark a Saved Search as default, click the Default icon next to a Saved Search.

The Default icon is filled and the Remove icon is disabled.

Remove

The Remove icon is used to remove the Saved Search from the Saved Searches list.

To remove a Saved Search from the Saved Searches list, click the Remove icon.

The Saved Search is removed from the Saved Search list.

Note: The Saved Search marked as default cannot be removed, and when a Saved Search is marked as default, the Remove icon for the Saved Search is disabled. To enable the Remove icon for the default Saved Search, mark a different Saved Search as default.

Documentation Change Log

Software Version	Document Section	Changes	Published Date
0.3.106	Custom Service Level Report	Added the Custom Service Level Report	11/20/2025

N/A = Not applicable. This change is not related to a specific version of the software.

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