Contact Center Advisor and Workforce Advisor Help

Adding a Key Action Report from the Map

5/10/2025

Adding a Key Action Report from the Map

One alert in a key action report is designated as the primary alert. Adding a key action report for an alert from the map automatically flags the alert as primary. The primary alert values are saved at the time the key action report is saved, so if you view the key action report later, you can see a snapshot of the circumstances at that time. These values appear only in the **Key Action Reports** table and are never updated.

Use the following procedure to add a key action report that records the action taken to resolve an alert violation and the results of that action. To complete this task, your role must include permissions to access the **Action Management Report** (AMR) page.

Adding a Key Action Report

1. On the map, do one of the following:
   - Double-click in the carousel on a tile representing a contact center alert. If clicking the alert tiles in the Map does not launch the **Action Management Report** page, you do not have permission to view it.
   - From the **Alerts** window, click the **Create Report** link for an alert. If the link is not visible, you do not have permission to view the **Action Management Report** page.
   - When an alert is for a network contact center and an agent-group contact center that share the call type, both the network contact center and the agent-group contact center display an alert on the map. When you click either tile, the summary indicates both contact centers because the alert that either tile represents is the same underlying alert.
2. Enter the first few letters of the responsible assignee's user name, first name, last name or e-mail, and select a name. The user name is displayed.
3. Specify when the key action was performed in the **Key Action Time, Date,** and **Time Zone** fields.
4. The time format is `hh:mm` using the 24-hour clock. The date format is `MM/DD/YYYY` or you can select a date by using from the calendar icon. The default is the current system time, date, and time zone of your server.
5. Either select a cause from the **Cause** drop-down list or type one in the **Cause** field. The cause name must be unique and is not case-sensitive.
6. To suggest that the cause you typed in the **Cause** field should be available for future selection from the **Cause** drop-down list, select the **Add to List?** check box.
7. The cause will display in the **Causes** table on the **Administration Alert Causes** page for an administrator to approve.
8. Optionally, provide more details for the cause in the **Alert Cause Description** text box. An alert cause must be specified in order to enter a description. The text-box limit is 256 characters.
9. Either select a key action from the **Key Action Taken** drop-down list or type one in the **Key Action** field. The key action name must be unique and is not case-sensitive.
10. To suggest that the key action you typed in the **Key Action Taken** field should be available for selection in the future from the **Key Action Taken** drop-down list, select the **Add to List?** check box.

The key action taken displays in the **Key Actions Taken** table on the **Administration Key Actions** page for an administrator to approve.

11. Optionally, provide more details for the key action in the **Key Action Taken Description** text box. A key action must be specified in order to enter a description. The text-box limit is 256 characters.
12. Enter a description of the results of the action taken in the **Results of Action Taken** text box. Once the key action report is saved, the description cannot be edited. The text-box limit is 256 characters.
13. Enter a description of the positive or negative results of the action taken in the **Lessons Learned** text box. The text box limit is 256 characters.
14. To rate the success of the action taken, select a rating from the **Success Rating** drop-down list.
15. To save the key action report, click **Save**. The **Action Management Report** page closes and the dashboard is displayed.
16. The **Action Management Report** page can also be launched from a metric threshold violation alert, or a peripheral gateway offline alert, by clicking on the arrow icon in the upper right of the **Alerts** pane. The alerts table on the AMR page is populated with the information from the alert from which the AMR is launched.