Contact Center Advisor and Workforce Advisor Help

Modifying a Key Action Report

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Modifying a Key Action Report

You can modify a key action report to make corrections or to complete the **Follow Up** section. The key action and the result of action taken are the only non-editable data. When an existing key action report is opened, the alerts in the **Alerts** section display current values.

Access to the **Alert Management** module and the **Action Management Report** page is controlled by user roles defined by your administrator (role–based access). To edit a key action report using the following procedure, your role must include permissions to access the **Alert Management** module and the **Action Management Report** page.

> **Tip**
> Text boxes are limited to 256 characters.

Alerts added to an existing key action report are *secondary alerts.*

To modify a key action report:

1. From the **Alert Management** module, select the **Key Action Reports—Alerts** view. The **Key Action Reports** pane appears on top.
2. Click the **Edit** icon for a key action report. The **Action Management Report** page displays the key action report details.
3. To remove an alert from a key action report, in the **Alerts** section clear the **Assign to Key Action Report** check box.
4. Type the first few letters of the responsible assignee’s user name and select a name. The user name is displayed.
5. Specify when the key action was performed in the **Key Action Time, Date,** and **Time Zone** fields. The time format is `hh:mm` using the 24-hour clock. The date format is `MM/DD/YYYY` or you can select a calendar by clicking the **Calendar** icon. The default is the current system time, date, and time zone of your server.
6. Either select a cause from the **Cause** drop-down list or enter one in the **Cause** field. The cause name must be unique and is not case-sensitive.
7. To make the cause you entered available for selection in the future from the drop-down list, select the **Add to List?** check box. The cause appears 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.
9. To make the key action you entered in the **Key Action Taken** field 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 appears in the **Key Actions Taken** table on the **Administration Key Actions** page for an administrator to approve.
10. 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.

11. Enter a description of the positive or negative results of the action taken in the **Lessons Learned** text box.
12. To rate the success of the action taken, select a rating from the **Success Rating** drop-down list.
13. To save your information, click **Save.** The **Action Management Report** page closes and the **Alert Management** module appears. The key action report appears and is highlighted in the **Key Action Reports** pane.