

3.17 Frequently Asked Questions

Bright Pattern Documentation

Generated: 11/01/2024 12:11 am

Content is available under license unless otherwise noted.

Table of Contents

Table of Contents	2
About FAQ	5
Topics	5
After Call Work	6
What could be driving up After Call Work (ACW) time so high?	6
Agent Desktop Helper Application	6
Why Doesn't Agent Desktop Work on Windows 10?	6
Not Ready	6
Does an agent have to change status to "Not Ready" to make an outbound call?	6
Outbound Calls	7
How can I choose the number to be used when making an outbound call?	7
Queue	7
Why would customers be placed in a queue?	7
Rejecting Calls	8
Why would agents reject a call?	8
Selecting Services	8
How do agents select a service to use?	8
Voicemail	8
How do I set up my personal voicemail?	8
Callback	9
What is the difference between virtual queue and callback?	9
For callbacks, we utilize a method that adds callers to a list, which is then processed by a separate service. Is there a way to monitor how many calls are pending in these lists?	9
Caller ID	9
How do I add a caller ID to an outbound campaign or service?	9
Email	10
How can we limit the number of emails that each agent receives each day?	10
How do you limit the number of spam emails sent to agents?	11
Email SMTP Settings	11
How do I update the SMTP settings and test connectivity?	11
Exporting Recordings	13
How do I get internal call recordings that are not associated with a service to be exported?	13
Help Screens	13
How do I change the information shown on my tenant's Help Screens?	13
Hold Music	14
What format can be used for hold music?	14
Outbound Campaigns	14
My outbound voice campaign is not working. How do I know how to fix it?	14
Recordings	15
Why does the call recording show a duration of 10:09 when the call only lasted 1:40?	15
Recovering Past Recordings	15
Is there any way to recover old recordings from a specific time frame in the past?	15
Scenarios	16
How do I delete unused scenarios?	16
How can I edit the text that chat bubble that appears on our webpage?	16
Services	16
Skills	16
Is there a way to set up our web chat so that only certain people receive the chat message? Do you need to add to skill levels?	16
Supervisors	17
How do I supervise?	17
A user whose Admin rights were removed logged into the system and was able to assign himself to all the privileges,	

including Admin. How is that possible?	17
Users	18
When a user changes his or her name, how can we make that change without impacting that user's metrics?	18
Virtual Queue Configuration	18
How do I set up virtual queuing for my inbound services?	18
Aux Codes	19
Is there an existing report that will show the aux codes (i.e., "Not Ready" reasons) of the agents?	19
Customizing Reports	19
In the "Interval Report with SL" report template, is it possible to add a column for the number of agents staffed?	19
For generated reports (specifically, the Agent Performance report), how can I remove inactive agents from the drop-down list?	19
Dispositions	20
How do I view disposition and notes for a specific service?	20
Interaction Records	20
Where can I find an interaction report?	20
How do I limit the interaction records search to specific results?	20
Is there a way to identify whether the agent or respondent ended the interaction using the block info?	21
Interpreting Reports	22
Why does my interval report show calls received when we are closed?	22
Why does my Call Detail report show more calls than we actually received?	22
How do I interpret an agent metric that shows an agent with a 12.6 satisfaction score?	23
What does it mean if the net promoter score is in negative value?	23
Why does the "call abandoned" metric show zero in my Service Metrics report? Why would there be no abandoned calls/chats if not all calls/chats were handled?	23
In the Call Detail by Service report, what does it mean if the "Sys Dispo" is blank?	24
In my Service Metrics report, I missed 18% of chats yesterday, which is significantly more than I have ever missed. How do I improve my chat handle rate?	25
Metrics	26
In the "service_in_time_counters" table, how is the value for "num_calls_answered" determined?	26
What is the definition of "total_busy_time_in"? What about "total_busy_time_out" and "total_ready_time"?	26
Occupancy	26
Removing Users from Reports	27
My reports show employees who no longer work with us. How do I delete the inactive users and their profiles?	27
Report Access	27
How do I change report access for supervisors? Is there a specific place I can permit or deny access to specific reports for defined roles?	27
Report Execution Error	27
When I run the Call Detail report, I get an error message: "Report execution error: Report "call_detail" exceeded the limit of 200 maximum pages."	27
What should I do when I get an error message while running the Agent Performance daily report (custom)?	28
Reporting Database	28
How do I get the Agent Performance report not to include rejected calls?	28
Reviewing Scenario Steps	30
How do I know what happened during a scenario?	30
Which report includes scenario steps?	31
Scheduled Reports	31
How do I schedule a report?	31
At the start of the new year, we stopped receiving our daily scheduled reports. How do I fix this?	31
In my scheduled reports, how do I change the date coverage to be Saturday to Friday?	32
Which Report to Use	33
My contact center's hold times are too high. How do I see which agent is driving up that metric?	33
How do I know the number of calls handled by a team?	34
How do I view the metrics (specifically, SLA metrics) for inbound calls?	34
When a caller requests a callback and the agent does call back, is the call then considered an inbound call or an outbound call?	35
Request Skill Block	35

Do the skills assigned using the Request Skill block or Find Agent block affect report statistics?	35
Scenario Blocks	36
Do the skills assigned using the Request Skill block or Find Agent block affect report statistics?	36
Variable \$(user.loginId) does not get the agent's username in scenarios. We are currently calling it after the Connect Call block in order to build the path for the call recordings. How is this fixed?	36
Variables	36
Variable \$(user.loginId) does not get the agent's username in scenarios. We are currently calling it after the Connect Call block in order to build the path for the call recordings. How is this fixed?	36
Agent Desktop Voicemail Configuration	37

About FAQ

Frequently Asked Questions (FAQ) contains real questions asked by Bright Pattern customers and clients, which have been answered by Bright Pattern's Customer Success team and Support team. Questions are organized by application and/or topic.

You may browse and view topics by clicking on the links that appear on the

- menu on the left-hand side of the page
- Topics list below
- [FAQ Category page](#).

Bright Pattern also offers video tutorials for select topics. See section *Video Tutorials* of FAQ.

You can refer to these questions and answers, as well as Bright Pattern's dedicated manuals, guides, and tutorials, for ideas on how to solve common issues. If you do not find what you are looking for, you may [contact](#) Bright Pattern for assistance.

Topics

Agent Desktop

- [After Call Work](#)
- [Rejecting Calls](#)
- [Not Ready](#)
- [Outbound Calls](#)
- [Queue](#)
- [Selecting Services](#)
- [Voicemail](#)

Contact Center Administrator

- [Callback](#)
- [Caller ID](#)
- [Email](#)
- [Email SMTP Settings](#)
- [Exporting Recordings](#)
- [Help Screens](#)
- [Hold Music](#)
- [Outbound Campaigns](#)
- [Recordings](#)
- [Recovering Past Recordings](#)
- [Scenarios](#)
- [Skills](#)
- [Supervisors](#)
- [Virtual Queue Configuration](#)

Reporting

- [Aux Codes](#)
- [Customizing Reports](#)
- [Dispositions](#)

- [Interaction Records](#)
- [Interpreting Reports](#)
- [Metrics](#)
- [Removing Users from Reports](#)
- [Report Access](#)
- [Report Execution Error](#)
- [Reporting Database](#)
- [Reviewing Scenario Steps](#)
- [Scheduled Reports](#)
- [Which Report to Use](#)

Scenario Builder

- [Request Skill Block](#)
- [Scenario Blocks](#)
- [Variables](#)

Video Tutorials

- [Agent Desktop Voicemail Configuration](#)

After Call Work

What could be driving up After Call Work (ACW) time so high?

In your current configuration, the ACW state could require agents to select the “checkmark” button to indicate that they are done. If ACW time is considered to be too high, you can set a timer on ACW on a team-wide basis. You may set a timer on ACW time by logging in as Admin to the Contact Center Administrator application and navigating to *Configuration > Users & Teams > Teams*.

For more information, see the *Contact Center Administrator Guide*, section [Teams](#), and read the information about *Exit After Call Work*.

Agent Desktop Helper Application

Why Doesn't Agent Desktop Work on Windows 10?

For Windows 10 systems running Avast Anti Virus, the Agent Desktop application must be added as an exception before the Agent Desktop Helper Application can be downloaded and installed.

1. On your computer, open the Avast Console.
2. Add the Agent Desktop application URL (e.g., "http://<yourtenantname>.brightpattern.com/agentdesktop/") to the exceptions list.
3. Download and install the [Agent Desktop Helper Application](#).

After running through those steps, Agent Desktop should function as expected.

Not Ready

Does an agent have to change status to “Not Ready” to make an

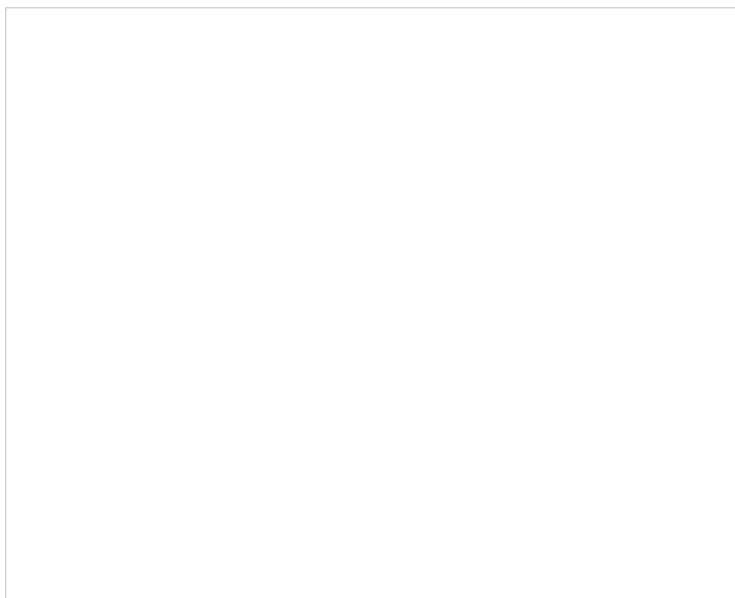
outbound call?

An agent does not have to change status to *Not Ready* in order to make an outbound call; however, if the agent wants to prevent an inbound call at that time, then the agent would have to take that step. If an agent is in *Not Ready* and someone forces the agent to be *Ready*, then the agent is available for an inbound call.

Outbound Calls

How can I choose the number to be used when making an outbound call?

You can define which number is to be used as the outbound caller ID by using your service selector in Agent Desktop. The service selector appears in the Active Communications List above the Recent / Directory / Favorites tabs.



Use the Service Selector to choose the type of service to be used for the interaction

Caller IDs (i.e., phone numbers) are added to outbound campaigns and services from the Services & Campaigns section of the Contact Center Administrator application, within the [Numbers tab](#). If the desired service does not appear in the service selector of your Agent Desktop, contact your system administrator for assistance.

Queue

Why would customers be placed in a queue?

If there are agents logged in and busy with other work, then the chat customers would wait in queue. If there are no agents skilled for chat logged into the system, then the "No Agents" branch of the chat scenario will execute and send the following text to customers: "Sorry, there are no agents available."

Rejecting Calls

Why would agents reject a call?

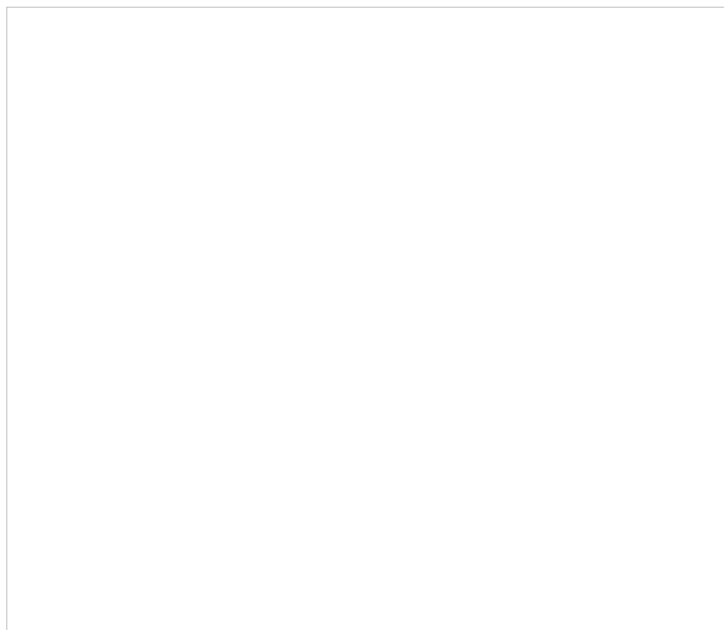
Agents may reject a call if the phone is ringing and they do not have the bandwidth to accept the call (e.g., this is common for direct dials). Alternatively, agents might be logged out (i.e., with unregistered extensions), which would cause the agents not to answer.

Selecting Services

How do agents select a service to use?

In the Agent Desktop application, agents can use the *Service Selector* to select the desired service. The available services and campaigns shown in the selector depend on what has been configured and assigned for your team.

The Service Selector appears on the left-hand side of Agent Desktop, beneath the *Number Input Field*. Use the down arrow to view available services in the drop-down menu.



Use the Service Selector to choose a service

For more information on how to use Agent Desktop, refer to the *Agent Guide*, section [User Interface Overview](#).

Voicemail

How do I set up my personal voicemail?

In the Agent Desktop application, agents and supervisors can activate voicemail and save personal voicemail greetings by going to *Settings > User Profile*. Configuration steps are given in the *Agent Guide*, section [Configuring Your Voicemail](#).

The simple process of setting up voicemail is also described in Bright Pattern's [Agent Desktop Voicemail Configuration video tutorial](#).

Callback

What is the difference between virtual queue and callback?

There is no difference--*virtual queuing* and the *callback option* are the same feature in Bright Pattern Contact Center. For more on virtual queuing, refer to the [Virtual Queue Tutorial](#).

For callbacks, we utilize a method that adds callers to a list, which is then processed by a separate service. Is there a way to monitor how many calls are pending in these lists?

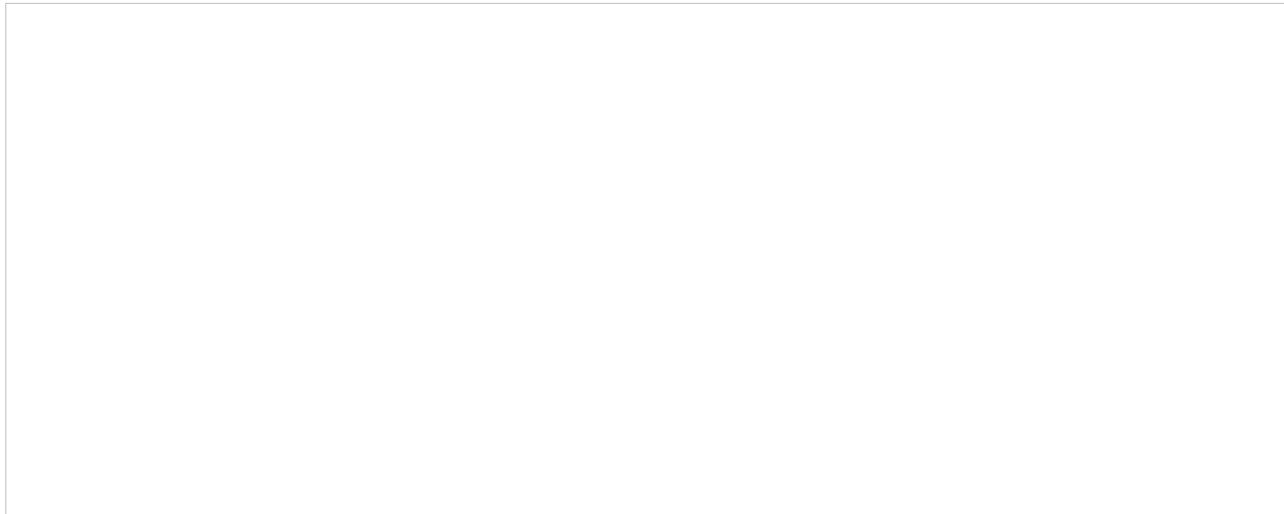
This should be as simple as monitoring the real time metric *total_remaining*. To make a quick distinction, you can see how many calls can be dialed right now by looking at dialable numbers, whereas you can see how many callbacks are pending a final disposition by looking at *total_remaining*.

For more information, see the *Supervisor Guide*, section [General Information About Campaign Operation](#).

Caller ID

How do I add a caller ID to an outbound campaign or service?

Caller IDs are added to outbound campaigns and services from the Services & Campaigns section of the Contact Center Administrator application, within the [Numbers tab](#). Note that the Numbers tab is accessible from only inbound and outbound services and campaigns; you will not see the Numbers tab if you have selected a mobile/web service.



Services & Campaigns > Inbound Service > Numbers Tab

To add a caller ID, follow these steps:

1. Log in as Admin to Contact Center Administrator.
2. Navigate to *Configuration > Services & Campaigns* and select the desired service (must be a voice service).
3. Click the **Numbers tab** to view the screen properties.
4. At the top of the *Numbers tab* screen properties, click the **Caller ID** tab. This opens up the caller ID screen properties.
5. Refer to the caller ID setup instructions given in the *Contact Center Administrator Guide*, section [Numbers Tab](#), subsection *Caller ID tab*.

Important: Read all of subsection [Caller ID tab](#) before you proceed because there are preliminary steps to take before you can update your caller ID screen properties. These steps include specifying the properties for the *Scenarios tab* and the [Dial-in scenario entries](#).

Email

How can we limit the number of emails that each agent receives each day?

There is not a way to limit the number of emails delivered to the agent throughout the day. You may wish to try one of these options:

- You can select the [Pull distribution method](#), so that [agents can grab emails manually](#) from a centralized Team Queue and only work on selected emails.

[Push-Pull-Distribution.png](#)



- Take a similar approach but have [Supervisors assign agents emails directly](#).

How do you limit the number of spam emails sent to agents?

There is not a built-in method for handling spam automatically. Spam detection would occur at the mailbox/mail server level, so it should be filtered before being delivered to the Team Queue inbox or being pushed to the agents. You may learn more about email settings in the *Contact Center Administrator Guide*, section [Email Service Configuration](#).

Email SMTP Settings

How do I update the SMTP settings and test connectivity?

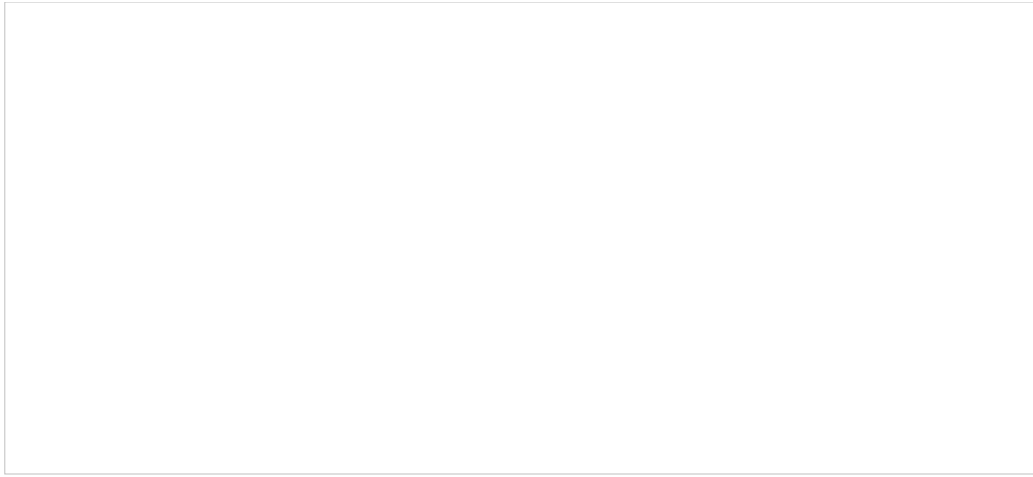
In the Contact Center Administrator application, there are two places where SMTP connection settings are specified:

1. *Configuration > Email Settings > SMTP Configuration*- For connection to the SMTP server used for auxiliary email communications, including transcripts of chat sessions, password reset instructions, scheduled reports, and voicemail audio files
2. *Configuration > Scenario Entries > Email*- For configuration of SMTP for inbound/outbound email interactions with customers

It is a good idea to set up SMTP in both places. Before you begin, read the [SMTP Configuration](#) and [Email](#) sections of the *Contact Center Administrator Guide*.

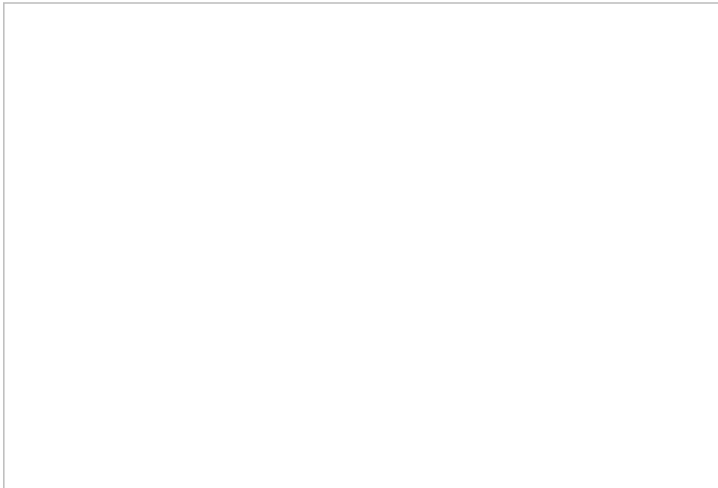
For option no. 1 (specifying SMTP server connection for aux email, chat transcripts, reports, etc.), you can configure SMTP connection settings by following these steps:

1. From the *Email Settings* menu, select **SMTP Configuration**.
2. Enter the screen properties. (For complete descriptions of the screen properties, refer to subsection *SMTP Configuration Screen Properties* of the [Email Settings](#) section of the *Contact Center Administrator Guide*.)



Email Settings > SMTP Configuration

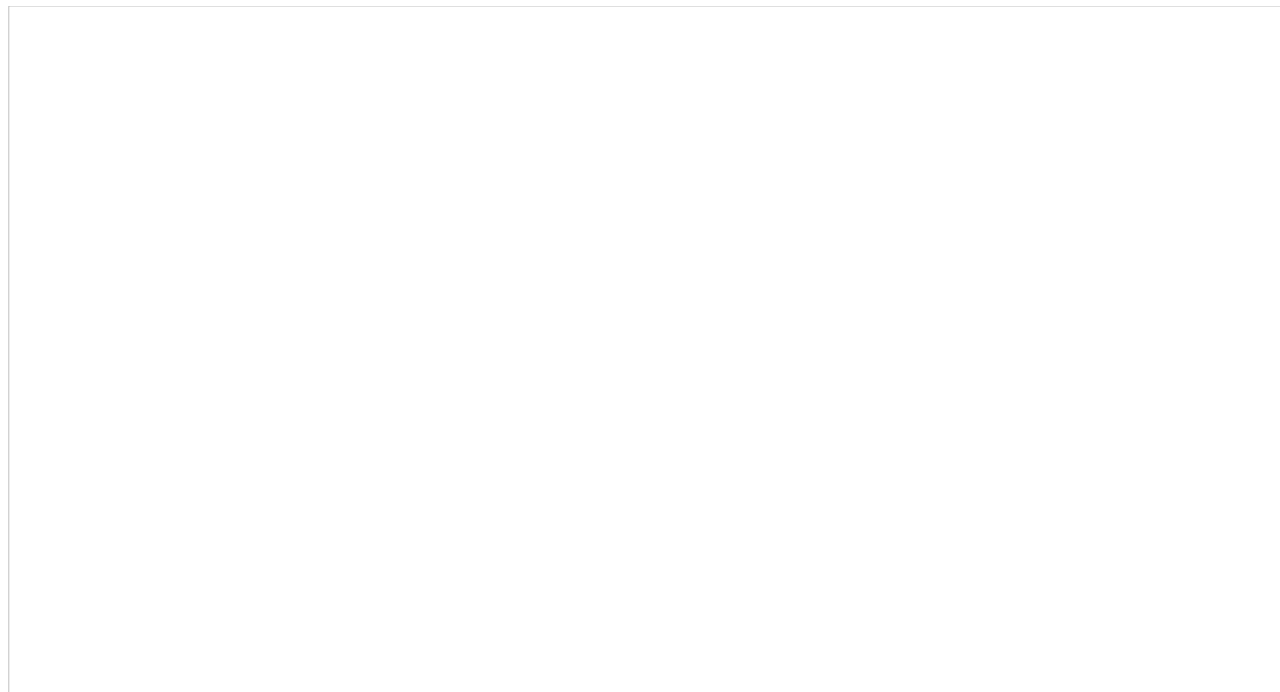
3. Click the **Check settings** button to verify the correctness of your SMTP settings. This button will bring up an email window that allows you to send an email as a test.



Send yourself a test email

For option no. 2 (configuring SMTP for inbound/outbound email with customers), you can configure SMTP connection settings by following these steps:

1. From the *Scenario Entries* menu, select **Email**.
2. If you have not already set up an email account, click the + button to add an account.
3. Click the **Account tab** and enter the screen properties for incoming mail and outgoing mail. (Refer to the *Screen Properties* descriptions in the [Email](#) section of the *Contact Center Administrator Guide*.)
4. Click the **Test** buttons for both incoming mail and outgoing mail to test your connection. Test until you receive the "Success" message.
5. Do the "real" test: From an external email account, pretend that you are a customer and send an email message to the account you just configured. You should be able to open the email message and reply to it from the Agent Desktop application. For more information on Agent Desktop email, refer to the [Agent Guide](#).



Scenario Entries > Email

Exporting Recordings

How do I get internal call recordings that are not associated with a service to be exported?

The calls must be associated with a service to be available for export. Refer to the *Contact Center Administrator Guide*, section [Services & Campaigns](#) and section [Results Tab](#) for more information on setting up services and exporting call recordings.

Help Screens

How do I change the information shown on my tenant's Help Screens?

Help Screens may be edited in the Contact Center Administrator application from *Configuration > Users & Teams > Help Screens*. From there, you may add, edit, or remove items. Items to add include phone numbers, URLs, and emails. For ideas on what to include, you may wish to solicit your team to inquire what they would want to see in those categories. You can also tailor content based on skill/roll if you want to create different content for different functions.

For more information about what you can do, see the *Contact Center Administrator Guide*, section [Help Screens](#).



Help Screens appear in every Agent Desktop for your tenant.

Hold Music

What format can be used for hold music?

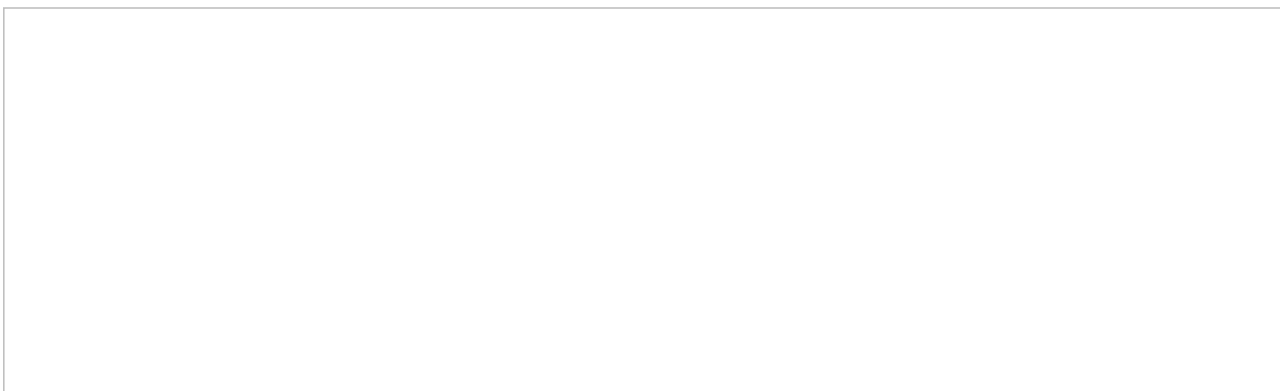
Bright Pattern currently supports .WAV files in the following format: G.711 ulaw mono 8 KBPS format. Although we do not currently support MP3 files or stereo audio, support for stereo audio and additional file types will be added at a later time.

Hold music is uploaded in the Contact Center Administrator application, section [Audio Treatments](#).

Outbound Campaigns

My outbound voice campaign is not working. How do I know how to fix it?

The [Diagnostics tab](#) within the Services & Campaigns section of Contact Center Administrator will tell you exactly what is wrong via a list of detailed configuration checks. What's more, each configuration check provides an **edit** link, which takes you directly to the page where you can address the issue.



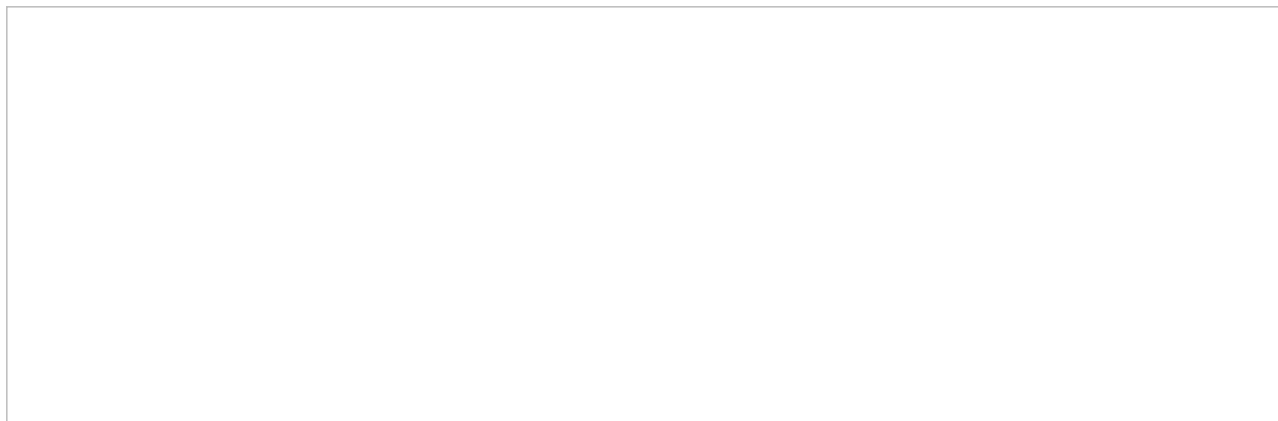
Examples of Diagnostics configuration checks

Some common issues that are easily addressed with configuration checks include inconsistent assignment of teams, disabled outbound voice campaigns, undefined calling numbers, incorrect caller ID setup, and more.

The *Diagnostics* tab is the last item to check after you have set up an outbound voice campaign. It is located in the Contact Center Administrator application, in *Configuration > Services & Campaigns > Outbound Voice Service > Diagnostics*. For more information, refer to the *Contact Center Administrator Guide*, section [Diagnostics tab](#).

Recordings

Why does the call recording show a duration of 10:09 when the call only lasted 1:40?



Call recording overview

If you drill down into the interaction, you can see the length of each segment of the call. In your case, the call may have been transferred and 10:09 encompasses the entire duration of the call, not just the active talk time. While the overall interaction is 10:09, the talk time that is recorded is only 1:40, which does match the length of the recording.

Recovering Past Recordings

Is there any way to recover old recordings from a specific time frame in the past?

It is certainly possible to recover recordings from a past time frame; however, doing so involves [contacting Bright Pattern](#) to engage the operations team and submit a statement of work with a billable charge. If these recordings are critical, Bright Pattern can prepare an estimate for you.

To avoid the future need to recover such recordings, it is recommended that you proceed with setting up periodic recording export jobs going forward.

The capability to transfer the recordings via FTP/SFTP is set up in the Contact Center Administrator application:

1. Log in as Admin.
2. Navigate to *Configuration > Services & Campaigns > [your desired service] > Results tab > Periodic Recording Export Jobs*.
3. Review the information about Periodic Recording Export Jobs settings in the *Contact Center Administrator*

Guide, section [Results tab](#).

4. Schedule your desired recording export job to run overnight, after 1:00 am, to capture the previous day's data without interfering with your business hours.

Note that for future needs, Bright Pattern offers extended storage options, as well as the ability to transfer the recordings via FTP/SFTP.

Scenarios

How do I delete unused scenarios?

You can delete any scenario that you want to remove from your tenant using the button on the *Scenarios* tab of your Contact Center Administrator application.

For more information, see the *Contact Center Administrator Guide*, section [Scenarios Overview](#).

How can I edit the text that chat bubble that appears on our webpage?

This is as simple as editing your snippet.js for chat bubbles (i.e., your Javascript code for the chat scenario that is embedded into your webpage). You may edit it directly from your webpage, or you may edit the generated web chat code provided by Contact Center Administrator:

1. Log in as Admin to the Contact Center Administrator application.
2. Navigate to *Configuration > Scenarios > Chat*.
3. In the *Scenario Entries tab*, click the **HTML Snippet** button to copy the code to embed on your webpage.
4. Edit the code as desired and paste into the Edit HTML portion of your webpage.

For more information, see the *Contact Center Administrator Guide*, section [Mobile and Web](#).

Services

Skills

Is there a way to set up our web chat so that only certain people receive the chat message? Do you need to add to skill levels?

If your team is assigned to service the web chat, the agents in that team will receive the chat messages. If you do not want anyone to receive these messages, or for that matter, you want other agents to receive them, you will need to adjust the skills levels for the web chat.

Best practice is to set skills at intervals of 25 (e.g., 100, 75, 50). What this will do is cause the web chat scenario to find an agent with a skill level of 100 first, then 75, and then 50. The higher-skilled agents will get the chat messages before the lower-skilled agents, and the agents with no skill will not be served a chat.

For more information, see the *Contact Center Administrator Guide*, section [Skill Levels](#).

Supervisors

How do I supervise?

To be a supervisor, you must be given the role "Supervisor" and you must be assigned to supervise a team. Note that supervisors are assigned at the team level only.

You may add a supervisor to a team by following these steps:

1. Log in as Admin to the Contact Center Administrator application.
2. Make sure that the person who will be the supervisor has been added to the system as a [User](#).
3. From *Configuration > Users & Teams > Users*, select the user who will be supervising.
4. Click the **Roles** tab.
5. Select the checkbox for **Supervisor** and apply your changes. Note that a user can have multiple roles (e.g., can be both an agent and supervisor).

[Supervisor-Checkbox.png](#)



6. Navigate to *Configuration > Users & Teams > Teams* and select the team that the user will supervise.
7. From the *Properties* tab, next to "Supervisors", click **edit**.
8. Select the user who now has the supervisor role and assign him/her to the team by clicking the arrow buttons, and click OK.

[Assign-Supervisor.png](#)



That user is now the supervisor of the team. You may add multiple supervisors to a team.

A user whose Admin rights were removed logged into the system and was able to assign himself to all the privileges, including Admin. How is that possible?

If the user was both a supervisor and an agent, the user would have had certain privileges extended to him or her. Under the supervisor role, the settings *Grant Privileges* and *Manage roles and security* may have been enabled. You may revoke these privileges from the supervisor role by following these steps:

1. In the Contact Center Administrator application, log in as Admin.
2. Navigate to *Configuration > Roles* and select **Supervisor** from the list of roles.
3. Select or deselect the desired privileges.



User privileges may be set in the Roles Properties tab

For more information, see the *Contact Center Administrator Guide*, section [Roles](#).

Users

When a user changes his or her name, how can we make that change without impacting that user's metrics?

The username cannot be changed. A new username would need to be created, which would impact previous reports and metrics. You can, however, change display name (first/last) without any impact to reporting.

Virtual Queue Configuration

How do I set up virtual queuing for my inbound services?

Virtual queuing (VQ), also known as Bright Pattern's *callback option*, is enabled for an inbound service from the [Find Agent](#) block settings of the service's scenario.

To enable virtual queue, you should determine which service will have VQ enabled, and then follow all the steps given in the *Virtual Queue Tutorial*, section [Configuration](#).

For examples of a VQ-enabled scenario, see the [Virtual Queue Tutorial](#).

Aux Codes

Is there an existing report that will show the aux codes (i.e., “Not Ready” reasons) of the agents?

There is not a report that will show all *Not Ready* codes for agents; however, you may wish to review the [Agent Time Allocation](#) report, which shows how much time agents of selected teams spent in various activities relative to the total logon time within the reporting interval. This report will show a total percentage of *Not Ready* (all *Reasons*) and break out the default *Not Ready* code of "Lunch," as this is typically one that all of our customers retain.

You can access the Agent Time Allocation report in the Contact Center Administrator application by navigating to *Reports* and selecting the Agent Time Allocation report in the list.

There is not a stock report that shows the breakdown of all *Not Ready* reasons. Because these are customizable reasons, the stock reports would not reflect these.

Customizing Reports

In the “Interval Report with SL” report template, is it possible to add a column for the number of agents staffed?

Yes--the “Interval Report with SL” report template is built upon the table *Service_in_time_counters*, which includes the fields *min_agents* (minimum number of agents) and *max_agents* (maximum number of agents).

Should you wish to add these fields to your report, you may do the following:

1. Download the report template (a .JRXML file) for the report in question.
2. Import and open the .JRXML file in Jaspersoft Studio.
3. Add two new columns for the fields desired to the table. These should be:

- Column “Minimum Agents” with field $\$F\{min_agents\}$
- Column “Maximum Agents” with field $\$F\{max_agents\}$

1. Create the added fields as Jaspersoft Studio fields.
2. Update the crosstab table to include the newly added fields.
3. Save the modified report with a new name (so you can find it easily).
4. Upload it to the Contact Center Administrator application (i.e., your tenant) by going to *Configuration > Reporting > Report Templates*.

For more information on customizing report templates in Jaspersoft Studio, see the [Custom Reporting Tutorial](#).

For generated reports (specifically, the Agent Performance report), how can I remove inactive agents from the drop-down list?

These users will remain in the reporting lists for historical reporting reasons and cannot be removed.

Dispositions

How do I view disposition and notes for a specific service?

You can find such information in the following places:

- In your stock Call Detail report (in Contact Center Administrator, navigate to Reports and click Call Detail).
- In your Call Detail report that you have customized to include disposition and notes for a service
- In [interaction records](#)

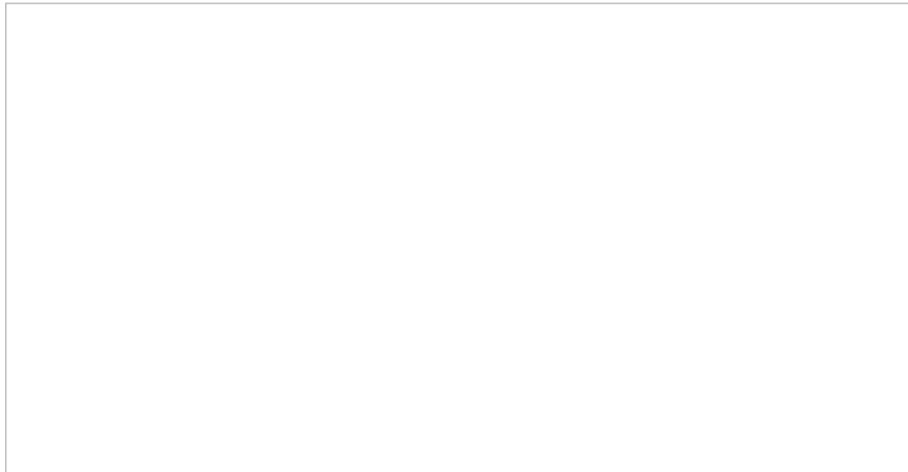
Because your focus is a single service, *Call Detail by Service* (i.e., the customized Call Detail report) is likely to be your best solution. You can [download the .JRXML file](#) of the Call Detail report template and modify the file in Jaspersoft Studio. In doing so, you should add fields (columns) for “Service Name” which is $\$F\{service_name\}$ and “Disposition Notes” which is $\$F\{agent_disposition_notes\}$, respectively.

For more information on importing and modifying reports in Jaspersoft Studio, see the [Custom Reporting Tutorial](#).

Interaction Records

Where can I find an interaction report?

Interaction record searching is available in the Contact Center Administrator application at *Reports > Interaction Records*. In your searches, you may filter for media type (voice, chat, email) and add a host of qualifiers in your search.



You can search for interaction records at Reports > Interaction Records

For more information, see the *Contact Center Administrator Guide*, section [Interaction Records Search](#).

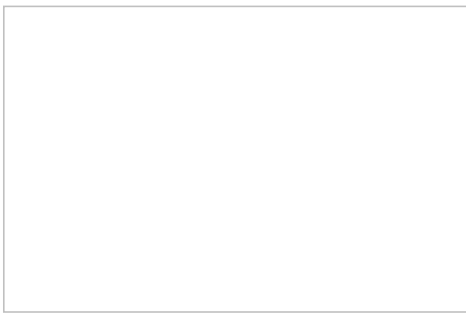
How do I limit the interaction records search to specific results?

You may add a [condition](#) to your [Interaction Records Search](#) by clicking **add condition**. You may add as many as you like. Conditions are search criteria (i.e., data elements) that return specific types of data in your search.

To use such conditions in your search, follow these steps:

1. In Contact Center Administrator, navigate to *Reports > Interaction Records*.
2. Select the media type (voice, chat, email) for your search. Note that the criteria shown in the drop-down menu will depend on the media type (i.e., voice, chat, email) that you select here.
3. Under *Search Criteria*, click **add condition**.
4. From the drop-down menu, select the desired search condition (one at a time), select the value for that condition, and click the green checkmark to apply changes.
5. Repeat step 4 as desired.
6. At the bottom of the screen, click **Search**.

Your search criteria will look something like this:



Example of search criteria added to an interaction records search

For a complete list of search criteria and their descriptions, see the *Reporting Reference Guide*, section [Search Criteria](#).

Is there a way to Identify whether the agent or respondent ended the interaction using the block info?

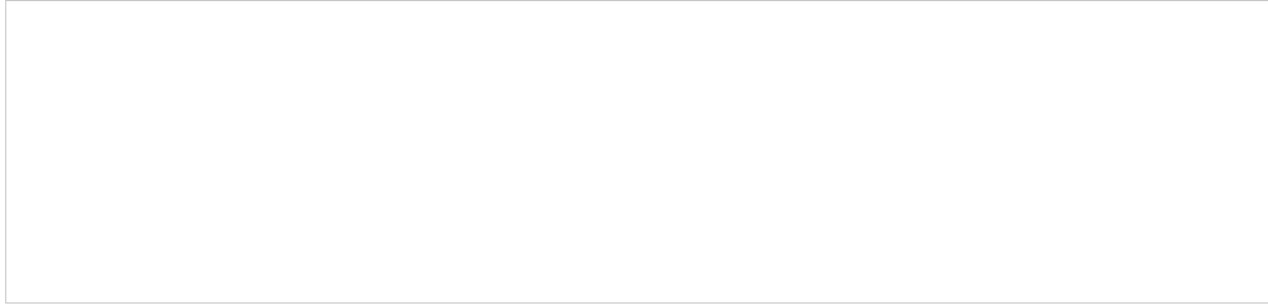
Remember that your campaign calls run through a scenario and are delivered inbound to your agents. In the case of an inbound call, the easiest way to tell how the interaction has ended is to look at the interaction record and view the scenario exit taken.

- If the interaction record shows that target (agent) disconnected, then it means that the agent hung up first.
- If the interaction shows exception, then it means that the customer hung up first. On a manual outbound campaign, the opposite is true.

To view interaction records and view the exit taken:

1. In the Contact Center Administrator application, navigate to Reports > Interaction Records.
2. Do an [Interaction Records Search](#).
3. Set your search criteria to "Voice" and specify the conditions for time frame, agent, and so forth, and run the search.
4. In the [search results](#), select the interaction in question and click the **scenario** link (see column *Scenario*). This will bring you to the *Scenario Steps* page, which gives information about the actions taken in the scenario for the interaction. (For more information on scenario steps, see the *Reporting Reference Guide*, section [Search Results](#).)

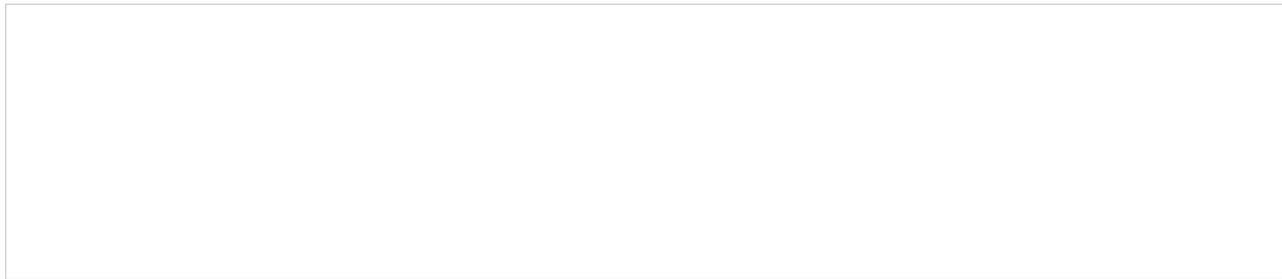
Column *Block Exit taken* will note the interaction exit. This is where you will see either “target” or “exception,” among other possible block exits.



View all the actions taken during the scenario

Interpreting Reports

Why does my interval report show calls received when we are closed?



Call Detail example

Your contact center can still receive calls, even during non-business hours. These calls are handled by your after-hours message(s) or other after hours handling. Reports will still show the number of calls received by your contact center, even if agents do not answer the calls (hence, data for daily services = zero).

In the your example Call Detail report (a custom report, not from a report template), you can see the number of calls received in the “Total Calls Received” column. Notice that the column “Handled by Agent” lists “0” (zero) for each call and that “Average Talk Time” lists 00:00:00 for each call.

Why does my Call Detail report show more calls than we actually received?

Every call is reported as an interaction, even if there were no agents to answer the call. Calls that that did not go to an agent may have been marked in your interaction records with a disposition of "No Agent", which may have gone through *Time Out* in the scenario and were connected externally to your third-party overflow. These calls would be considered as part of your Handled metric. If you received many such calls, your call detail report would show them.

To exclude "Handled" or "No Agent" calls for reporting purposes, you may wish to exclude where disposition = "No Agent" when running your Call Detail report.

How do I interpret an agent metric that shows an agent with a 12.6 satisfaction score?

In general, with the scores being between 1 and 10, a value of 9.4, for example, would translate to 94%, if you are still basing the scores on the "out of 100" scale. If your survey questions were modified to insure that a value greater than 10 was not accepted, it is possible that the agent in question received a value with invalid input prior to when your survey questions were modified. That could be what has caused the number to be higher than 10. The next month's metrics should be accurate.

Given that 12.6 is higher than 10, we would interpret it as a positive number, not a bad score.

What does it mean if the net promoter score is in negative value?

This means that the scores were detractors. Refer to the [Agent Performance Report](#) documentation as well as the information on the Net Promoter Network ([NPS](#)).

- Promoters (score 9-10) are loyal enthusiasts who will keep buying and refer others, fueling growth.
- Passives (score 7-8) are satisfied but unenthusiastic customers who are vulnerable to competitive offerings.
- Detractors (score 0-6) are unhappy customers who can damage your brand and impede growth through negative word-of-mouth.

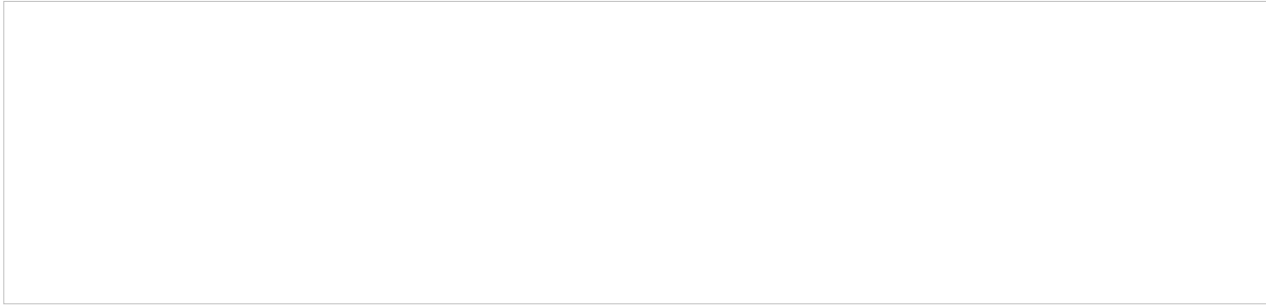
Subtracting the percentage of detractors from the percentage of promoters yields the Net Promoter Score, which can range from a low of -100 (if every customer is a detractor) to a high of 100 (if every customer is a promoter).

Why does the "call abandoned" metric show zero in my Service Metrics report? Why would there be no abandoned calls/chats if not all calls/chats were handled?

To see the path of these chats, you can run an interaction records search and investigate the scenario to see where the chat went.

To view interaction records and view scenario block types and exits taken:

- In the Contact Center Administrator application, navigate to *Reports > Interaction Records*.
- Do an *Interaction Records Search*.
- Set your search criteria to "Chat" and specify the conditions for time frame, agent, and so forth, and run the search.
- In the search results, select the interaction in question and click the scenario link (see column *Scenario*). This will bring you to the *Scenario Steps* page, which gives information about the actions taken in the scenario for the interaction.



View the actions taken in the scenario

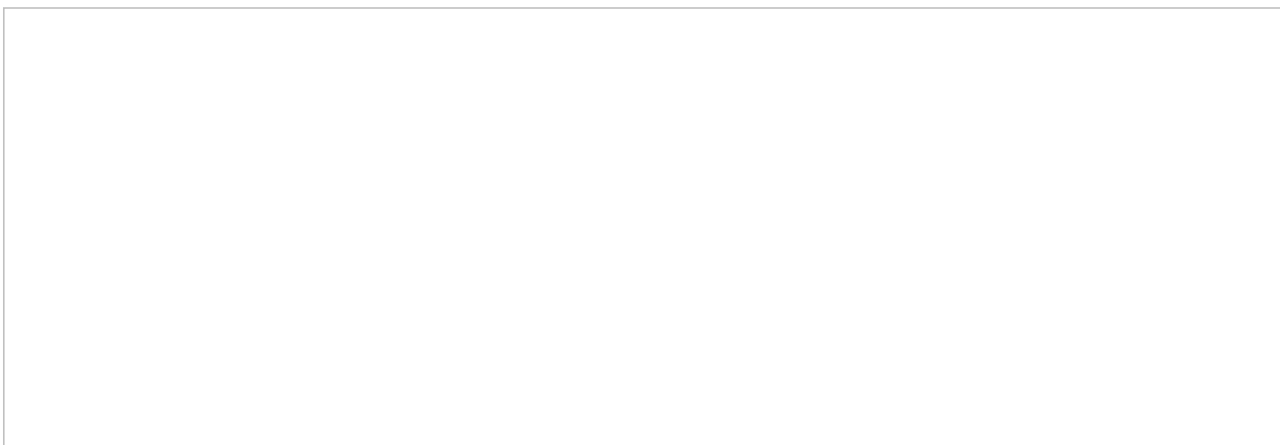
You may find that the chats in question are chats that were initiated by opening the form to chat but then took no action or ended when the browser window was closed.

You can modify the scenario to include a timeout (currently set to 10 minutes) where the scenario will forcibly close the chat window on the customer if the customer has not yet initiated chat. It will provide a message that explains that we have not heard from the customer and the chat will be terminated. These interactions will be marked as self service, which you would then see on your reports. Timeouts are set in the *Request Input* scenario block.

To include a timeout:

- Log in as Admin to Contact Center Administrator, and navigate to *Configuration > Scenarios > Chat*.
- Select the scenario you wish to modify, and click the **Edit scenario** button to view the scenario.
- When the scenario opens in the Scenario Builder application, add the [Request Input](#) block to the scenario. That is where you will specify the length of timeout (in seconds).

In the example shown, the length of timeout is 600 seconds (i.e., 10 minutes).



Request Input scenario block settings

In the Call Detail by Service report, what does it mean if the “Sys Dispo” is blank?

“Sys Dispo” refers to the system disposition. When calling into the service, there is an option to dial an extension. The caller enters an extension and the call attempts to deliver. If the agent is logged out or rejects the call, the scenario exits the call and accounts for the “no system disposition” you noted. For reporting purposes, you may choose to add a set disposition on the *Busy* branch of the *Find Agent* scenario block to accommodate such calls.

Alternatively, you may label the disposition as “extension unavailable” so that the “Sys Dispo” field is not blank in reports. To do this, you must first create the disposition on the desired service.

To create a disposition on the service:

1. Log in as Admin to the Contact Center Administrator application.
2. Navigate to *Configuration > Services & Campaigns*.
3. Highlight the service desired.
4. Click on the **Dispositions** tab.
5. Add the desired disposition, taking note of the disposition name exactly.
6. Apply changes.
7. Navigate to *Scenarios > Voice* and select the scenario desired.
8. Click the **Edit scenario** button to open the scenario in the Scenario Builder application.
9. On the Connect Call block under *No Answer* and *Busy*, insert (by dragging and dropping) the *Set Disposition* block.
10. Set the value to the value that you captured in step 5 of this procedure.
11. Apply changes.

After you have created the disposition on the service, you can label the disposition as “extension unavailable”:

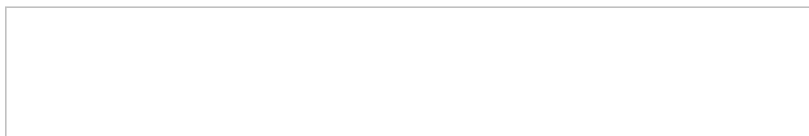
1. In your scenario, use the *Set Disposition* block and enter the value (for the disposition) that you created in step 5 of the previous procedure.
2. Apply your changes.

In my Service Metrics report, I missed 18% of chats yesterday, which is significantly more than I have ever missed. How do I improve my chat handle rate?

The Service Metrics report is correct; however, what may be affecting your numbers is the after hours (or in this case, before hours) chats that are currently allowed to attempt to route. If you allow incoming chats during non-business hours, any incoming chats that are received but not handled by agents (because no agents are available) will show as abandoned or timed out.

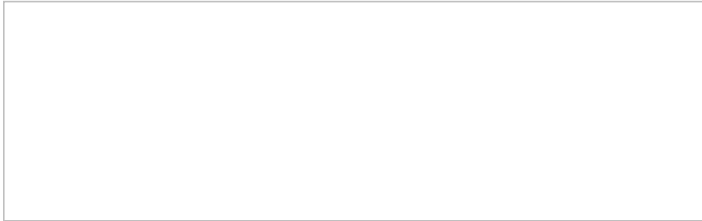
To change your hours for the chat service:

- Log in as Admin in the Contact Center Administrator application.
- Navigate to *Configuration > Scenarios > Chat* and select the chat service.
- On the *Scenario Entries* tab, specify the settings for Hours of Operation. If your hours are currently set to open 24/7, your screen properties may look as shown.



Setting the hours of operation

- Select specify and set your desired hours of operation. These are the hours that you are open and available to accept incoming calls and chats. In the example shown, the specified hours of operation are Monday through Friday, from 8:00 AM to 6:00 PM. Such hours will enable incoming chats to be routed to agents only during those hours.



Specified hours of operation

In the Scenario Builder application, you should modify your chat scenario to address the after hours situation. For example, you could add a [Send Message](#) block to your chat scenario, which sends a chat or SMS message to the customer that explains why the chat cannot be connected to an agent (e.g., "No agents are available for live chat because.... Our hours of operation are...."). In addition, you may want to consider more than 5 minutes for waiting--perhaps increase the waiting time to 8-10 minutes and see if this might be a better wait time for chats. Such a change is done from within your [Find Agent](#) scenario block. For more information, see the *Scenario Builder Reference Guide*, section [Find Agent](#).

Metrics

In the "service_in_time_counters" table, how is the value for "num_calls_answered" determined?

If the call is distributed to an agent, and that agent answers either manually or via auto answer, that call would count toward the *num_calls_answered* metric. For more information on this metric and others in the *service_in_time_counters* table, see the [Reporting Database Specification](#).

What is the definition of "total_busy_time_in"? What about "total_busy_time_out" and "total_ready_time"?

These metrics and others are defined in the *Reporting Database Specification*. Those specific metrics are defined in section [agent_performance](#):

- **total_busy_time_in** - Specifies the sum of times the agent was busy with inbound calls; includes hold times, but does not include ringing time or after call work time
- **total_busy_time_out** - Specifies the sum of times the agent was busy with outbound calls; includes hold times, but does not include dialing time or after call work time
- **total_ready_time** - Total time the agent spent in the Ready state during the aggregation interval

Occupancy

Removing Users from Reports

My reports show employees who no longer work with us. How do I delete the inactive users and their profiles?

Currently we do not have functionality that will allow you to remove data from old users. As your reports become more current, these agents will not appear in your reports.

Data is maintained for agents after they have been deleted, until the "age off" period for your data (historical detailed and aggregated). As this data ages, the agents who had been deleted would be removed. Some tenants keep their settings at 1 year for storing detailed records and 2 years for storing aggregated records. You may not wish to lessen this amount of time any further, as all reporting would be lost, not just the deleted agents.

Report Access

How do I change report access for supervisors? Is there a specific place I can permit or deny access to specific reports for defined roles?

If the supervisors are able to view the reports, they are able to run them with the permissions they have. To ensure that supervisors can access reports, make sure that:

- The [privileges](#) for the supervisor [role](#) are set as desired
- The specified user is assigned the role *Supervisor*
- The specified user is added to the applicable *Team* for which a report is available

Supervisors must have the specified privilege(s) and be assigned to the team in order to access metrics/reports for the team.

To add supervisors to teams:

1. Log in as Admin to the Contact Center Administrator application.
2. Navigate to *Configuration > Users & Teams > Teams*.
3. Select a team.
4. Click the **Properties** tab.
5. Beside "Supervisors:", click **edit**.
6. Assign supervisor(s) to the team.

The supervisors assigned to the team will be able to view and run reports with the permissions (i.e., privileges) that they have been given.

For more information on users and teams, see the *Contact Center Administrator Guide*, section [Users & Teams](#).

Report Execution Error

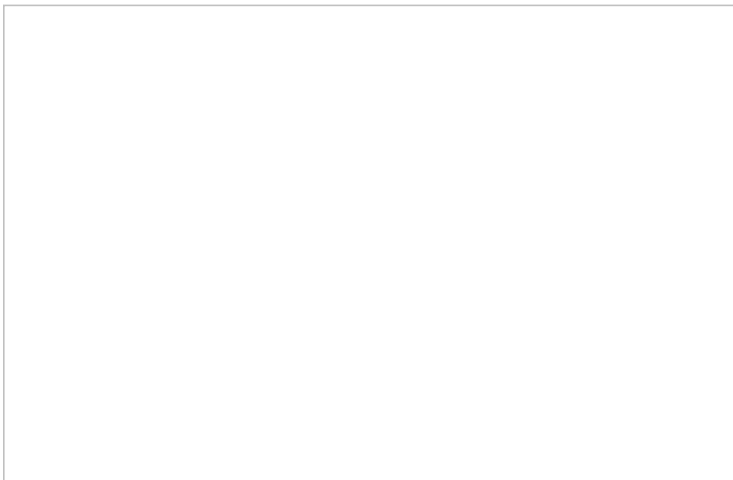
When I run the Call Detail report, I get an error message: "Report execution error: Report "call_detail" exceeded the limit of 200 maximum pages."

The 200-page limit is a static limit put in place for database performance reasons for on demand reporting. To get around the restriction, you can schedule this report to run by adding a scheduled report in Contact Center Administrator:

1. Log in as Admin and navigate to *Configuration > Reporting > Scheduled Reports*.
2. Add a new scheduled report by clicking the "+" button at the bottom of the screen.
3. Specify parameters for the report, referencing the *Contact Center Administrator Guide*, section [Scheduled Reports](#).

You can set up a scheduled report to run the previous day's call detail and deliver the report to you via email with an attached PDF.

What should I do when I get an error message while running the Agent Performance daily report (custom)?



Report execution error message

The limit of 50,000 rows is set to prevent performance issues, and as such, running the reports in smaller intervals is the answer.

Reporting Database

How do I get the Agent Performance report not to include rejected calls?

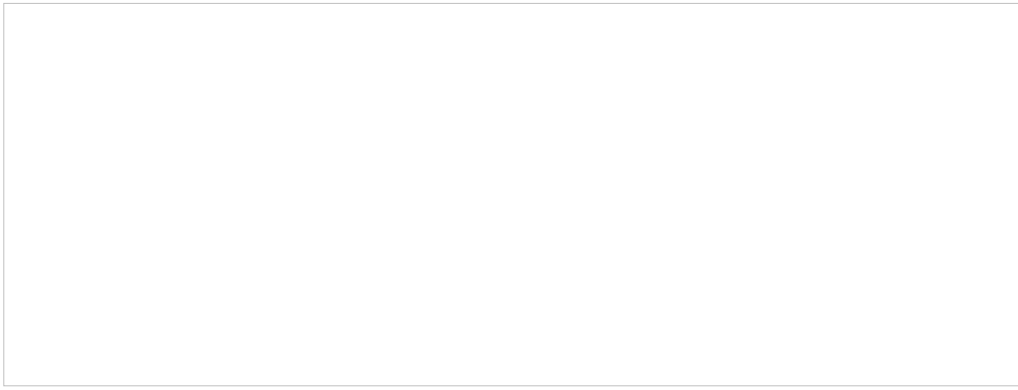
For reporting purposes, Bright Pattern Contact Center can count either all the inbound calls offered to the agent (via *num_calls_in*), or the answered inbound calls (*num_calls_answered*).

The system also can count rejected inbound calls (*inbound_calls-rejected_calls*). In this case, *no_answer_calls* also will be counted as inbound.

If you wish to see only the number of inbound calls that were answered, you can query the database for that specific information. In the following example, the database is queried using an application called SQLLeo.

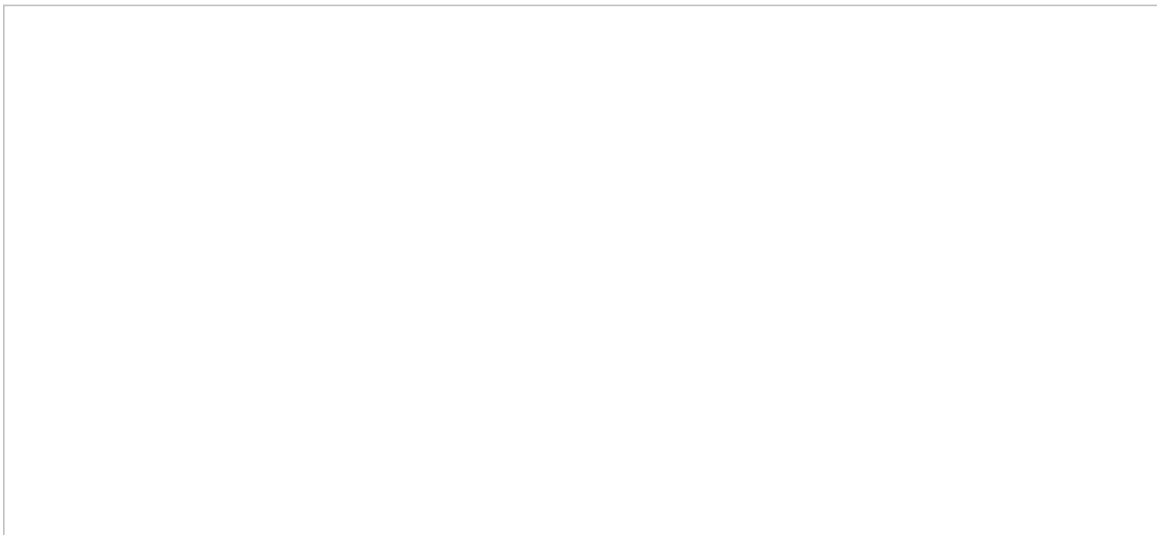
When querying the database for *agent_performance*, select only the metrics that you want to see. In SQLLeo, for example, you do so by following these steps:

- Select the table *agent_performance*.



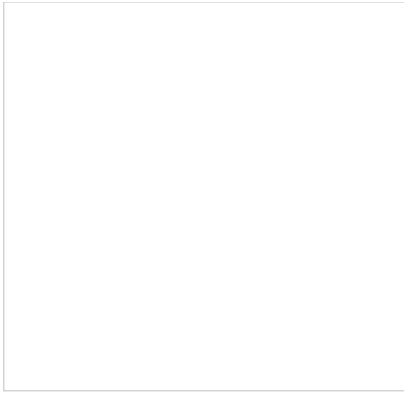
Selecting the desired table

- Right-click the selected table and select **add to new query**.



Adding the table to your database query

- Select the metrics for *total_num_calls*, *num_calls_in*, and *num_calls_answered* but NOT *num_calls_rejected* or *num_calls_no_answer*.



Selecting metrics to be shown in the data table

- Click the run button.

Your *agent_performance* report will no longer show the calls rejected. You can compare the number of calls offered to the agent (*num_calls_in*) to the calls actually answered by the agent (*num_calls_answered*) in order to see how they differ.

Reviewing Scenario Steps

How do I know what happened during a scenario?

You can review *scenario steps* to understand what happened during any interaction, be it voice, chat, or email. *Scenario steps* provide a detailed list of all the actions taken during the scenario used to process a specific interaction. You can access them via any [interaction records search](#).

To access scenario steps:

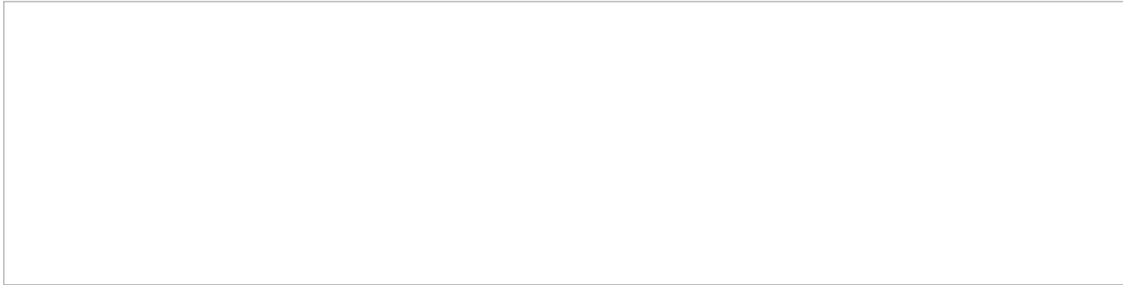
1. Log in as Admin to the Contact Center Administrator application.
2. Navigate to *Reports > Interaction Records*.
3. Do an [interaction records search](#), adding all desired [search criteria](#).
4. In the [interaction records search results](#), find the *Scenario* column and click on the link. This link is the name of the first scenario that was used to process this interaction.

When you click the scenario link, you will be redirected to the *Scenario Steps* page that lists each action taken during the scenario.

The following information for the scenario is provided:

- **Execution Order** - The numbered order in which the scenario step occurred
- **Date & Time** - The date (month/day/year) and the time (in the Universal Coordinated Time (UTC) time zone) in which the scenario step occurred
- **Duration** - The total length of the scenario step; time is given in the Universal Coordinated Time (UTC) time zone

- **Scenario Name** - The name of the scenario entry used
- **Block Type** - The shorthand name of the scenario block used (i.e., *IdentifyCustomer*, *RequestInput*, *SetProperty*, etc.)
- **Block Title** - The title of the block, if a variable or function is used to specify values in the scenario block
- **Block ID** - The numeric identifier of the scenario block
- **Block Exit taken** - The type of conditional exit taken for the scenario (note that this is one of the most useful scenario steps provided, as it shows why an interaction was ended)



Interaction Records > Scenario Steps

Which report includes scenario steps?

Scenario steps are not included as part of a report. They are found in [interaction records](#) because they contain the scenario history--the scenario steps--of an interaction.

For more information about interaction records, see the *Reporting Reference Guide*, section *Interaction Records Search*.

Scheduled Reports

How do I schedule a report?

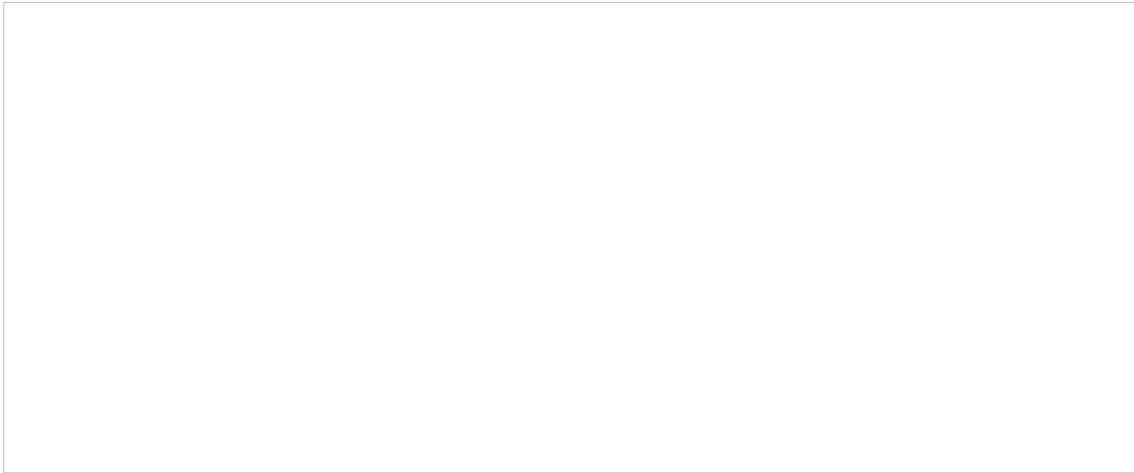
You can schedule a report to generated and emailed to you by adding a scheduled report in Contact Center Administrator:

1. Log in as Admin and navigate to *Configuration > Reporting > Scheduled Reports*.
2. Add a new scheduled report by clicking the "+" button at the bottom of the screen.
3. Specify parameters for the report, referencing the *Contact Center Administrator Guide*, section [Scheduled Reports](#). Make sure you choose the desired [report template](#) to use.

You can set up a scheduled report to run the previous day's call detail and deliver the report to you via email with an attached PDF.

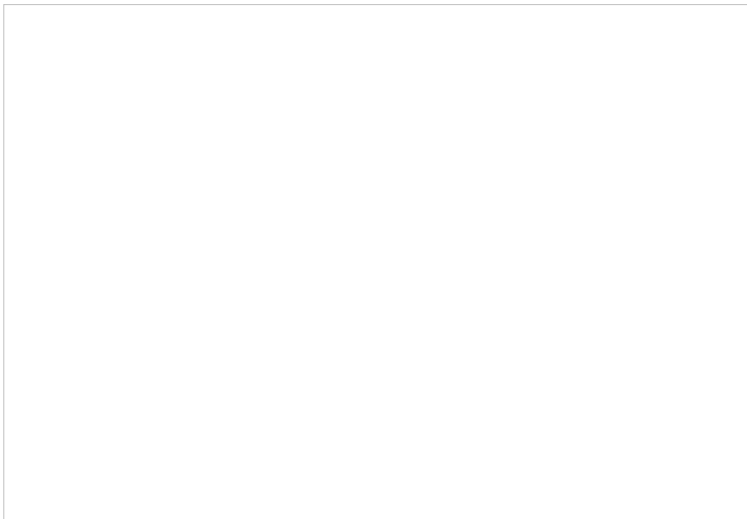
At the start of the new year, we stopped receiving our daily scheduled reports. How do I fix this?

Because scheduled reports are delivered via email, you should make sure that email is set up with your credentials. Your credentials can be accessed and modified in the Contact Center Administrator application. Log in as Admin and navigate to *Configuration > Email Settings > SMTP configuration*.



Email SMTP parameters

Retype your password and then click **Check settings** to try to send a test message to insure the system is able to send email.



Sending yourself a test message

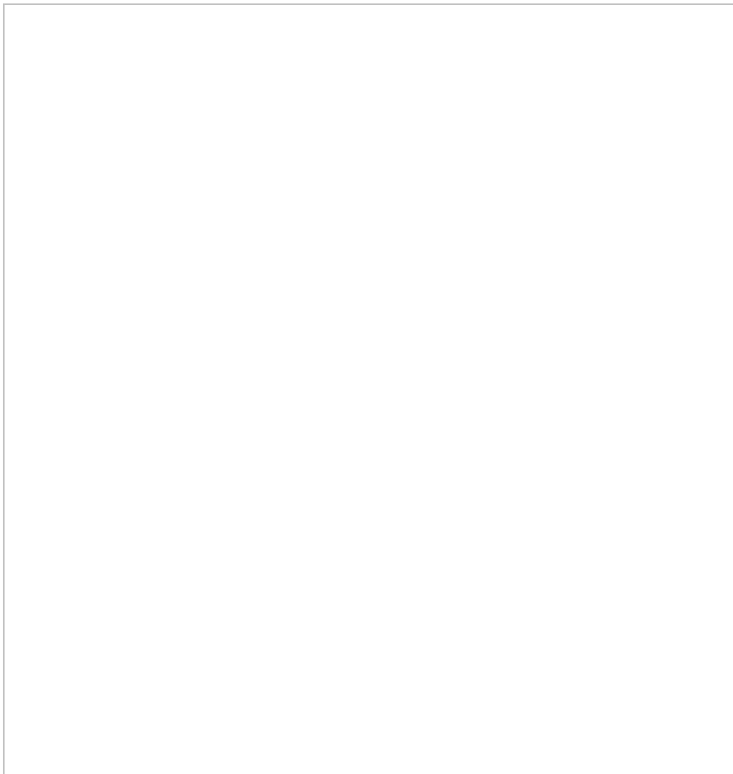
You do not have to do this for every scheduled report; this is the overall system setting, so your credentials and email configuration are modified in just one place, one time. It is a good idea, however, to review each scheduled report to see that the email is coming from you.

In my scheduled reports, how do I change the date coverage to be Saturday to Friday?

You can modify the schedule for this report at any time from the Contact Center Administrator application. You can change the parameters from "last week" to "Last N days" where N is the number of days. You may need to change the run day to Saturday and set the parameter "Last N" accordingly.

To modify the parameters in Contact Center Administrator:

1. Log in as Admin.
2. Navigate to *Configuration > Reporting > Scheduled Reports*.
3. From the list of scheduled reports, select the report that you wish to modify.
4. On the Parameters tab, under Report Schedule, set the recurrence to "weekly" and select the "Saturday" checkbox for the start run day.
5. Under *Report Parameters*, set the time frame to "Last N days" and then specify the number of days.



Report Schedule parameters

For more information about setting up scheduled reports, see the *Contact Center Administrator Guide*, section [Scheduled Reports](#).

Which Report to Use

My contact center's hold times are too high. How do I see which agent is driving up that metric?

Hold time appears by the call (and can be seen in the Call Detail report for each call, or in the Service Metrics report by queue). Agents themselves do not get "credit" for the hold time of a call. Bright Pattern Contact Center reports on hold time at the service- or call-level only.

As hold times do not apply to an agent, there is not a way (even by modifying the report template in Jaspersoft Studio), to report on hold times by agent.

What you can do is review *Not Ready* times for agents, as this would be more of an indicator of who may be contributing to longer queue hold times. Note, however, that these agents may have valid reasons for being *Not Ready*, but that may at least give you an opportunity to coach from that perspective.

The Agent Time Allocation report provides a breakdown of the agent time spent. See section [Agent Time Allocation](#) of the *Reporting Reference Guide* for more information.

How do I know the number of calls handled by a team?

To verify the number of calls handled by the members of the specific team:

- Run the *Agent Performance by Team* report, selecting the team name. Inspect the "Number of Calls Handled" column.
- To cross reference, run an Interaction Record search, filtering by date and agent. Doing so will confirm the number of calls handled by the agents on the team.

For more information on Interaction record searching and agent performance by team, please see the Bright Pattern Contact Center [Reporting Reference Guide](#).

If you notice that a large number of calls received were marked as "No Agent" or "abandoned", then you should:

- Review the team membership and make sure that the appropriate resources are assigned and skilled, and that they are logging in to the system daily to handle calls.
- Review your scenario logic to verify that the scenario is doing what you wish. For example, if there is currently no check for hours of operation (HOP), and instead, there is only a check for holidays and weekends, you may want to include an hours check based on service. Likewise, if you are only allowing calls to queue for a set number of seconds, after which they go to voicemail, then you may want to revisit the wait time on your Find Agent interval. See the [Contact Center Administrator Guide](#) for more information.

Use the [Agent Activity](#) report to identify trends/patterns in your agents' behavior, which may be resolved through coaching and training.

How do I view the metrics (specifically, SLA metrics) for inbound calls?

The typical reports to use for inbound call metrics are:

- Service Metrics (i.e., how the service performed)
- Agent Performance by Team (i.e., how the team performed for the inbound service)

For historical metrics, you should use the [Service Metrics](#) report.

Wallboards display real-time data for specified metrics. For wallboards (note that our standard wallboard will show you common metrics), you should limit the metrics shown to your inbound metrics. To do so, create a wallboard user that has access to these services, such as a supervisor on a team that is assigned just these metrics. You can access your wallboard through your Bright Pattern tenant, using your tenant URL and username/password to log in.



Logging in to your tenant's wallboard

When a caller requests a callback and the agent does call back, is the call then considered an inbound call or an outbound call?

For reporting purposes, the way that the interaction is reported depends on the report.

- The Call Detail report will give two entries: one for the inbound call, and one for the callback.
- The Service Metrics report will show this as a single inbound interaction.
- The Agent Performance report will show an inbound call.
- The supervisor dashboard will show this as a "Call Received" and also would log it under "CB Requested/CB Waiting metrics" where "CB" means "callback."

Request Skill Block

Do the skills assigned using the *Request Skill* block or *Find Agent* block affect report statistics?

The reports are only affected by skills assigned using the Request Skill or Service block or the skills assigned on scenario start (via dial-in entry configuration). The Find Agent block does not affect statistics.

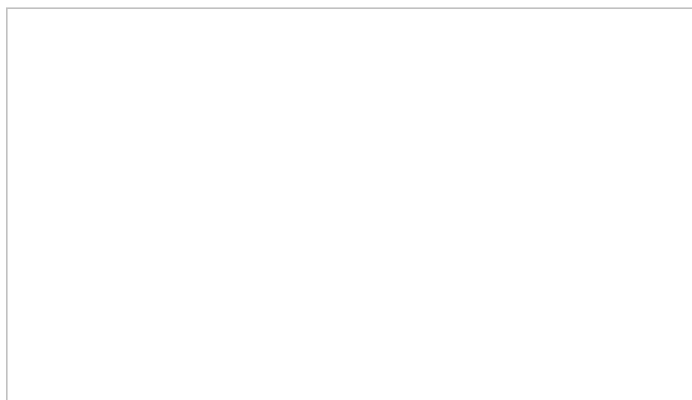
Scenario Blocks

Do the skills assigned using the *Request Skill* block or *Find Agent* block affect report statistics?

The reports are only affected by skills assigned using the Request Skill or Service block or the skills assigned on scenario start (via dial-in entry configuration). The Find Agent block does not affect statistics.

Variable $\$(user.loginId)$ does not get the agent's username in scenarios. We are currently calling it after the Connect Call block in order to build the path for the call recordings. How is this fixed?

In your scenario, the variable needs to be set between the [Find Agent](#) block and the [Connect Call](#) block. In order to get the agent's name, the variable has to be set after the agent is found. If you do not initiate the variable after the *Find Agent* block and before the *Connect Call* block, you will not know who the agent is.

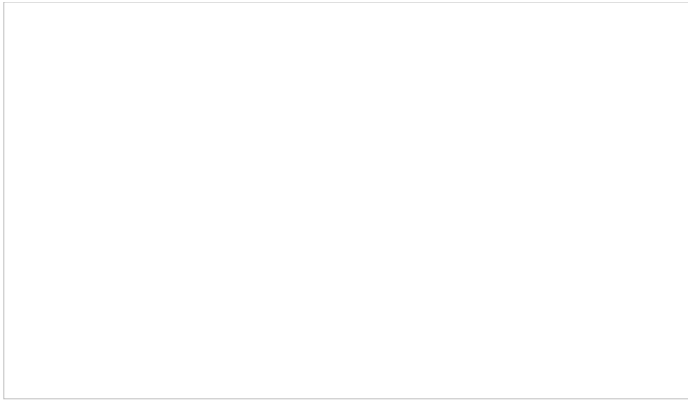


Example scenario where the Set Variable block follows the Find Agent block

Variables

Variable $\$(user.loginId)$ does not get the agent's username in scenarios. We are currently calling it after the Connect Call block in order to build the path for the call recordings. How is this fixed?

In your scenario, the variable needs to be set between the [Find Agent](#) block and the [Connect Call](#) block. In order to get the agent's name, the variable has to be set after the agent is found. If you do not initiate the variable after the *Find Agent* block and before the *Connect Call* block, you will not know who the agent is.



Example scenario where the Set Variable block follows the Find Agent block

Agent Desktop Voicemail Configuration

In the Agent Desktop application, agents and supervisors can activate voicemail and save personal voicemail greetings. Follow along with Bright Pattern's [Agent Desktop Voicemail Configuration video tutorial](#).

For more information, see the Bright Pattern Contact Center *Agent Guide*, section [Configuring Your Voicemail](#).