

3.18 Supervisor Guide

Bright Pattern Documentation

Generated: 6/01/2024 6:52 am

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Table of Contents

Table of Contents	2
Purpose	6
Audience	6
Starting Agent Desktop	6
How to Launch Agent Desktop	6
User Interface Overview	7
Working as an Agent	8
Working as a Supervisor	9
Active Supervision	10
General Information About Metric Viewing	10
Customization of Metric Views	10
Adding and Removing Metrics	11
Rearranging Metrics Columns and Reverting to Default Views	12
Saving a New Default View	12
Understanding Real-time Metrics	13
Service Metrics View	13
Service Metrics for One Team	14
Service Metrics for All Teams	14
How to Hide or Add Services	15
List of Service Metrics	16
Service Metric Descriptions	17
Busy	17
Busy Svc	17
CB Requested	17
CB Waiting	17
IN ASA	17
IN Active	17
IN Agent Disconnected	17
IN Avg Talk Time	17
IN Carried Over	17
IN Carried Over - New	18
IN Closed	18
IN Desktop	18
IN EWT	18
IN Handled	18
IN Handled New	18
IN Handled Unique	18
IN Handled Unique %	18
IN IVR Abandoned	18
IN IVR Dropped	18
IN in IVR	18
IN in Progress	19
IN Max Wait	19
IN Queue Abandoned	19
IN Queue Abandoned %	19
IN Queue Dropped	19
IN Queue Sh-Abandoned %	19
IN Queued	19
IN Queued Unique	19
IN Received	19
IN Received New	20
IN Rejected	20
IN Remote Disconnected	20
IN Replied	20
IN Ringing	20
IN Ringing Abandoned	20
IN Ringing Dropped	20
IN Routed	20
IN Self Serviced	20
IN Svc Change Received	20

IN Svc Changed	21
IN Svc Level %	21
IN Total Abandoned	21
IN Total Abandoned %	21
IN Total Talk Time	21
IN Transferred	21
IN Transfer Received	21
IN Waiting	21
Logged In	21
Not Ready	22
OUT Abandoned	22
OUT Abandoned %	22
OUT Active	22
OUT Agent Disconnected	22
OUT Answered %	22
OUT Avg Talk Time	22
OUT Dialed	22
OUT Handled	22
OUT IVR Abandoned	22
OUT IVR Abandoned %	22
OUT IVR Dropped	23
OUT in Progress	23
OUT Queue Abandoned	23
OUT Queue Abandoned %	23
OUT Queue Dropped	23
OUT Rejected	23
OUT Remote Disconnected	23
OUT Ringing	23
OUT Ringing Abandoned	23
OUT Ringing Dropped	23
OUT Routed	24
OUT Total Talk Time	24
OUT Transferred	24
OUT Unattended	24
OUT Unattended %	24
Occupancy	24
Ready	24
Skill Metrics View	24
List of Skill Metrics	25
Skill Metric Descriptions	25
IN Active	25
IN Max Wait	26
IN Waiting	26
Logged In	26
Ready	26
Agent Metrics View	26
Agents (All Teams)	26
Subteams	27
Viewing Subteams	27
Subteam Editing Mode	27
Adding and Removing Agents	27
Sorting	28
Icons	28
Multiple Interactions	29
List of Agent Metrics	29
Active	29
Agent Login Time	29
Agent State	30
Avg Idle Time	30
Avg Preview Time	30
Avg Reply Time	30
Hold	30
IN Active	30
IN Breached SLA	30
IN Carried Over	30
IN Closed	30

IN Desktop	30
IN Handled	31
IN Handled New	31
IN Offered	31
IN Pulled	31
IN Rejected	31
IN Replied	31
IN Svc Changes	31
IN Transferred	31
Interaction	31
OUT Agent Disconnected	32
OUT Desktop	32
OUT Discarded	32
OUT Handled	32
OUT Rejected	32
OUT Remote Disconnected	32
OUT Transferred	32
Occupancy	32
Preview Duration	32
Previewed	32
Rec	32
Service	33
Skipped	33
Skipped %	33
Talk	33
Time in State	33
Real-Time Metric Alerts	33
How to Set Threshold Values	34
How to Set System-Wide Thresholds	34
Changing Agent State	36
Individual Chat	37
Team Chat	38
Call Recording	38
How to Start and Stop Recording	39
Call Monitoring, Coaching, and Barge-In	39
How to Turn On/Off Supervision Modes	40
How to View Agents' Context Information Area	41
Continuous Agent Monitoring	41
Grading Calls in Progress	42
Agent Screen Monitoring	42
Managing Calendar Events	43
Working with Agent Calendars	43
Quality Management	44
General Information About Campaign Operation	45
General Campaign Metrics View	45
More Information	46
Individual Campaign Metrics View	46
Customization Options	47
List of Campaign Metrics	47
Metric Descriptions	48
ASR %	48
Attempted	48
Attempted %	48
Completed	48
Completed %	48
Dialable	48
Est Duration	48

Expired	48
Mode	49
OUT Answered	49
OUT Call Rate	49
OUT Failed	49
P. A. Completed	49
P. A. Remaining	49
Running	49
Total Completed	49
Total Completed %	49
Total DNC	49
Total Records	49
Total Remaining	49
Quota Metrics View	50
List of Quota Metrics	51
Metric Descriptions	51
Completed	51
Quota	51
Remaining	51
Successes	52
Total Records	52
Campaign Start and Stop	52
Lists View	53
List of List Metrics	54
Metric Descriptions	54
Completed	54
Dialable	54
Expired	54
P. A. Completed	54
P. A. Remaining	54
Total Completed	54
Total Completed %	55
Total DNC	55
Total Records	55
Total Remaining	55
Enabling and Disabling Lists within a Campaign	55
Campaign Teams View	56
Adding and Removing Campaign Teams	56
General Information About Email Queue Management	57
Assigning Email to an Agent	57
Managing Queues	58
Reviewing and Assigning Emails	59
Managing My Queues (Personal Email Queues)	60

Purpose

The Bright Pattern Contact Center *Supervisor Guide* provides instructions for using the Agent Desktop application to perform typical contact center supervisor functions, such as real-time monitoring of key contact center performance indicators and helping agents with call handling. The guide also explains tasks related to real-time campaign management.

The *Supervisor Guide* focuses exclusively on using the Agent Desktop application to perform agent supervision and campaign management tasks. Note that the same application is also used by contact center agents to provide customer service over the phone. For descriptions of all tasks related to customer service, see the Bright Pattern Contact Center *Agent Guide*.

[Next >](#)

Audience

The *Supervisor Guide* is intended for supervisors and managers of the Bright Pattern Contact Center-based call center who will use the Bright Pattern Contact Center applications to perform daily agent supervision and campaign management tasks. Readers of this guide are expected to be familiar with basic operations with Windows and Internet applications.

[< Previous](#) | [Next >](#)

Starting Agent Desktop

The Agent Desktop application can be run on either Microsoft Windows or Mac OS X in one of the following browsers:

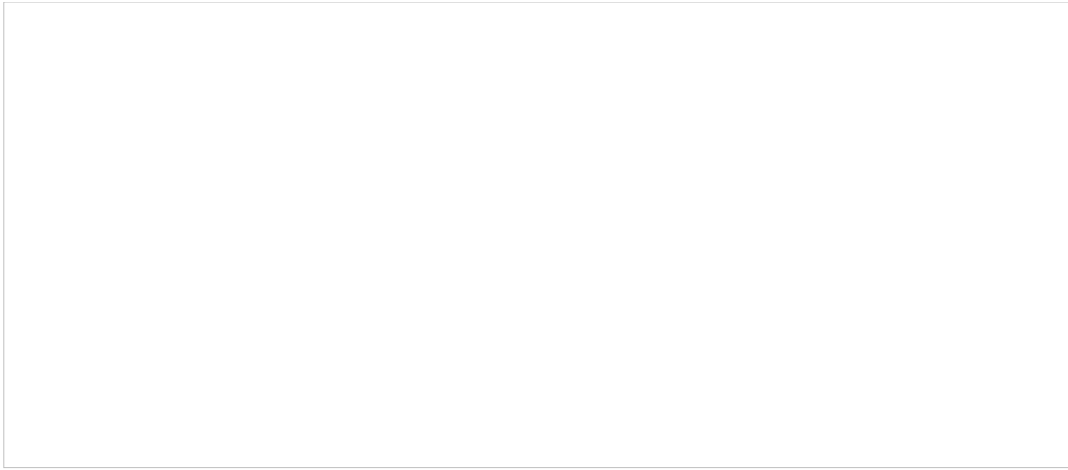
- Google Chrome
- Mozilla Firefox
- Internet Explorer 10 (Microsoft Windows 7 only)
- Internet Explorer 11 and later (Microsoft Windows 7, 8, and 10)
- Safari 8 and later (Mac OS X)

View the complete list of [system requirements](#) in the *Contact Center Administrator Guide*.

How to Launch Agent Desktop

Step 1: Open your browser application.

- In the address field, type the web site address (URL) provided by your system administrator.
- The login dialog box will appear. Enter your username and password.



Login screen

Step 2: Select phone device.

- Softphone (software phone) is the default. You may select a different type of phone to use, or even no phone.
- Refer to section [Selecting a Phone Device](#) for more information on the supported types of phones.

Step 3: Log in.

- Click the **Log in** button.
- Refer to section [Logging into Agent Desktop](#) for more information on Agent Desktop login.

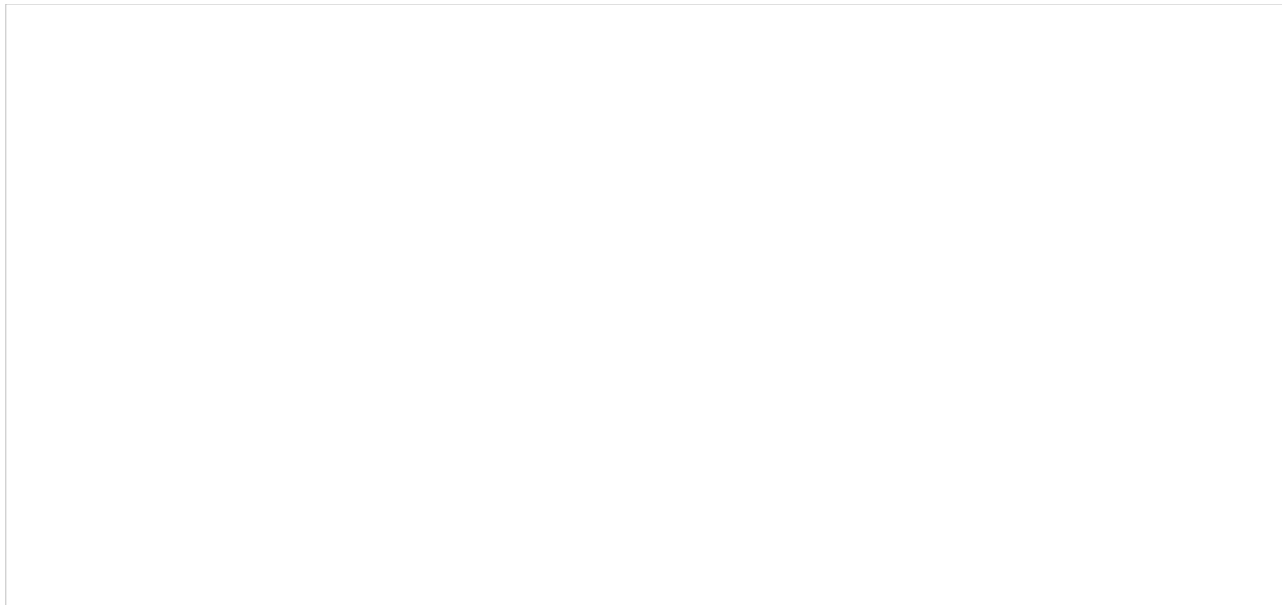
Successful logging into the Agent Desktop application marks the start of your working session. You will be initially assigned the *Supervising* state and you will not receive any service interactions while you are in this state. For making yourself available to handle service interactions, see section [Working as an Agent](#).

Note: Some of the functions described in this guide may not be available to you. This usually means that either the corresponding capabilities are disabled in your contact center or that you do not have the permissions to use the function in question. If you believe that you need access to such functions in order to perform your contact center tasks, contact your system administrator.

[< Previous](#) | [Next >](#)

User Interface Overview

The following image shows the Agent Desktop application screen in *Supervisor mode* with an active voice call and real-time metrics views for agents of a selected team and services provided by that team.



Agent Desktop interface in the Supervisor mode

Refer to Bright Pattern Contact Center *Agent Guide* for general information about the elements of the [Agent Desktop application screen](#).

Note the following differences specific to the use of Agent Desktop in Supervisor mode:

- In addition to your active interactions, the *Active Communications List* will display the teams that you are assigned to supervise. When you select a team, real-time metrics for the members of this team as well as the services assigned to this team will appear in the *Context Information Area*.
- As mentioned above, in the Supervisor Mode the *Context Information Area* will show real-time metrics related to your teams, services, and campaigns. For more information, see topics related to [real-time metrics viewing](#) and [campaign operation](#). This also means that unlike agents, you cannot run your Agent Desktop application in [the minimized view](#).
- In addition to the regular interaction-handling controls, the *Contact Info Panel* provides controls for active agent management. For more information, see topics related to [active agent management](#).

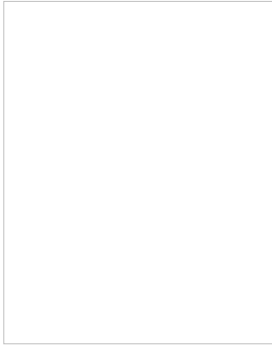
[< Previous](#) | [Next >](#)

Working as an Agent

As a supervisor, you will normally have all agent functions available to you, including handling service interactions and managing your states. For information about how to use these functions, refer to the Bright Pattern Contact Center [Agent Guide](#).

If you wish to work as an agent during your working session, simply change your user status from *Supervising* to *Ready*:

1. Click the **User Status Indicator/Selector** icon and select **Ready** as soon as you are ready to handle service interactions.
2. Follow the instructions in the *Agent Guide* for all further operations related to [manual agent state handling](#).



Selecting the Ready state

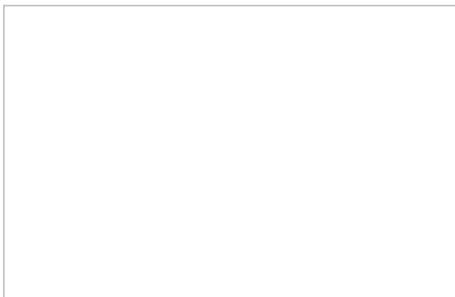
Note: In the Bright Pattern Contact Center system, access to various functions is controlled via role assignment. In order to be able to perform agent functions, you may need an agent role assigned to you by your system administrator, in addition to the supervisor role. If, after logging in, you cannot change your state to *Ready*, this probably means that you do not have an agent role assigned to you, and you will not be able to make or receive service calls. Contact your system administrator for the agent role to be added to your profile.

[< Previous](#) | [Next >](#)

Working as a Supervisor

As a supervisor, you will be assigned the *Supervising* state upon logging into the Agent Desktop application. You will not receive any service calls while you are in this state. If you do not plan to handle service calls during your working session, you are advised to stay in this state as opposed to using the *Not Ready* state, because the latter may negatively affect your team's statistics.

If you have to work as an agent temporarily during your working session, you can return to the *Supervising* state at any time except when you are in the [Busy](#) state (i.e., when you are actively communicating with a customer).



Selecting the Supervising state

To switch to the *Supervising* state, follow these steps:

1. Click the **User Status Indicator/Selector**.

2. Select **Supervising** from the drop-down menu. The teams that are assigned to you for supervision will be displayed in the *Active Communications List*.
3. Select the team that you wish to supervise now.



Selecting a team

Active Supervision

The Agent Desktop application supports active supervision of agents from all your teams. If you have the privilege "All assigned teams combined view," then you may see metrics for all agents in the teams that you are assigned to supervise. The agent metrics are displayed in the lower right pane of the Agent Desktop application.

Note: If you do not see any teams to supervise, that means that you have not been assigned to supervise any teams. 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, and supervisors are assigned by the system administrator. Contact your system administrator for assistance.

[< Previous](#) | [Next >](#)

General Information About Metric Viewing

As a supervisor, you can view real-time metrics for the [members of your teams](#), the [services assigned to your teams](#), and the [individual skills](#) within those services. These metrics will be displayed in the right pane of the Agent Desktop application when you are in the [Supervising](#) state.

Agent Desktop displays metrics for either one team or all teams at a time. If you have more than one team under your supervision, you can select the desired team from the *Active Communications List*. If you have the privilege "All assigned teams combined view," you can select the *All Teams* view in order to view metrics for agents from all your teams.

Real-time metrics are updated every few seconds.

[< Previous](#) | [Next >](#)

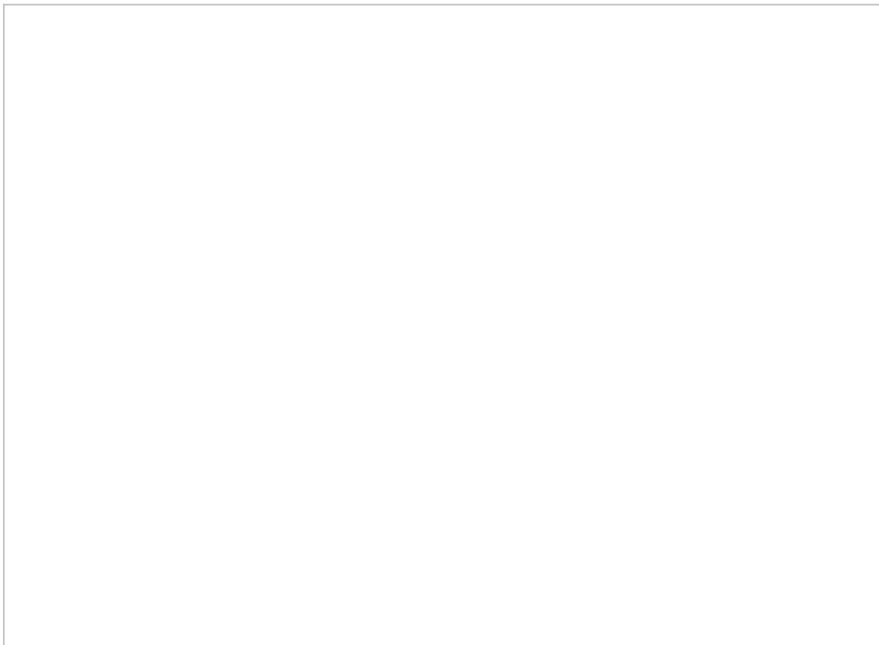
Customization of Metric Views

Depending on your permissions, you may be able to customize real-time metric views by removing undesired metrics, adding other metrics that you may want to see, and changing the order in which metrics are arranged in the table. You may also be able to set such a customized view as a default view for all other supervisors of your contact center.

Adding and Removing Metrics

To remove a particular metric:

1. Hover your cursor over the corresponding column name and click the drop-down menu icon  that will appear.
2. Select the **Hide metric** option.



How to hide metrics

To add a metric:

1. Hover your cursor over the name of the column next to where you want to add this new metric, and click the drop-down menu icon  that will appear.
2. Select the **Add metrics...** option. A list of available metrics will appear with checkboxes next to their names.
3. Locate the desired metric in the list and select its checkbox.
4. Click **OK**.



Select the metrics to be shown in Agent Desktop

Rearranging Metrics Columns and Reverting to Default Views

To rearrange the order of columns in the metrics view, use the mouse to drag the name of the columns to the desired locations.

You can also restore the original metrics set with the original order of columns. To do so, open the drop-down menu next to any metric and click the **Restore default view** option.

Saving a New Default View

Once you have completed all of the desired configuration changes, you can set the new view as the new default view for all other supervisors of your contact center. To do so, open the drop-down menu next to any metric and click the **Set view as default system-wide** setting. Note that this function requires a separate permission.

The list of metrics that appears when you click the **Add metric...** option contains brief descriptions for all real-time metrics available for the selected object (service, campaign, or agent). For the descriptions of metrics currently displayed in the metrics views, you can simply hover over the corresponding column titles.

For more detailed metric descriptions, follow these links:

- [Service Metrics](#)
- [Skill Metrics](#)
- [Agent Metrics](#)
- [Campaign Metrics](#)
- [List Metrics](#)

Understanding Real-time Metrics

Real-time metrics are constantly updated in real-time (every few seconds) to reflect the current status of your contact center operations. The system provides real-time metrics of two types: cumulative and instantaneous.

- *Cumulative metrics* include all events matching the described condition since the moment within the previous 24 hours when the real-time statistics were reset according to your contact center configuration. Most of cumulative metric names end with a verb in the perfect form and their descriptions are given in the present perfect form (e.g., *IN Queued: Number of inbound interactions that have entered the service queue*).
- *Instantaneous metrics* only count the resources that match the described condition at the present moment. Most of instantaneous metric names end with an adjective or a verb in the progressive form and their descriptions usually have words *current* or *currently* (e.g., *IN Waiting: Number of inbound interactions that are currently waiting in the service queue*). (Compare this example to the cumulative *IN Queued* metric.)



Agent Desktop displays metrics such as these in real-time

Names of many metrics have prefixes *IN*, *OUT*, or *CB*.

- Metrics whose names start with *IN* are related to inbound interactions.
- Metrics whose names start with *OUT* are related to outbound interactions. Unless explicitly stated otherwise in a metric description, these metrics count both regular outbound interactions made by agents (e.g., consult calls made with respect to inbound services) and campaign calls that may be dialed by the system and distributed to the agents when answered.
- Metrics whose names start with *CB* are related to inbound calls that selected the *Virtual Queue* option (i.e., callback requests).

For more detailed metric descriptions, follow these links:

- [Service Metrics](#)
- [Skill Metrics](#)
- [Agent Metrics](#)
- [Campaign Metrics](#)
- [List Metrics](#)

Service Metrics View

Service metrics are displayed in the *Services & Campaigns* view located in the top section of the *Context Information Area*. This view displays metrics for either all services assigned to the selected team, or all services assigned to all teams. You may toggle between specific team views and the *All Teams* view.

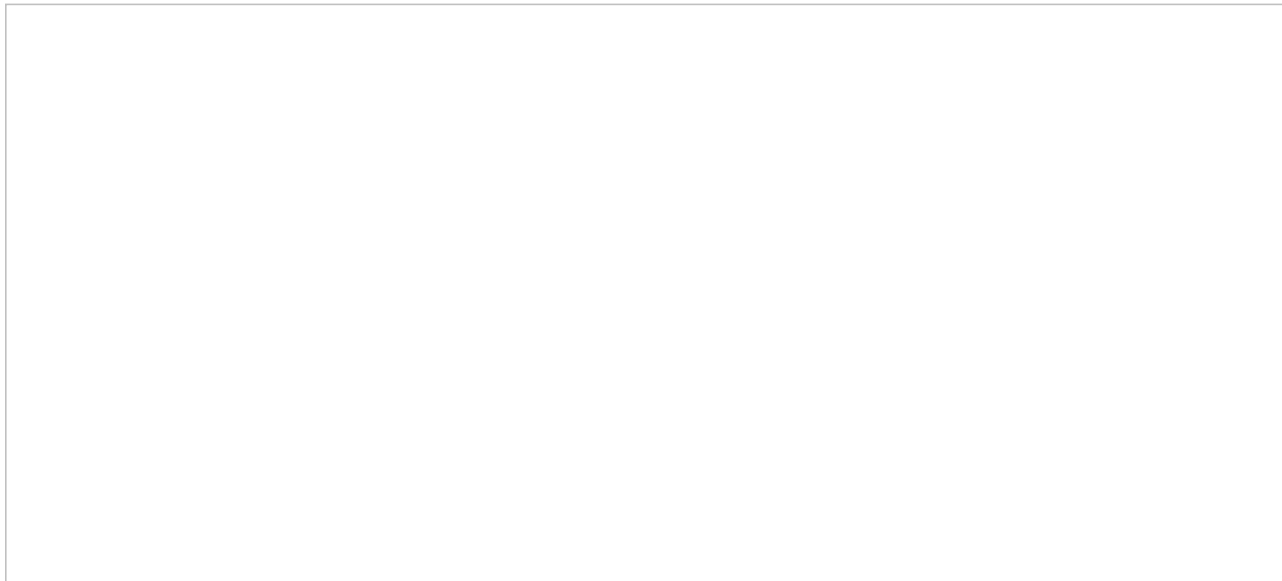
You can have services sorted automatically by the value of any currently displayed metric. The current sorting parameter will have the sorting icon displayed ☐ next to the metric name. By default, services are sorted alphabetically.

The last row of the service metrics view displays the cumulative values for all currently displayed services. In the *Name* column, the last row shows the total number of currently displayed services.

For detailed descriptions of the available service metrics, see section [List of Service Metrics](#).

Service Metrics for One Team

Selecting a team name from the Active Communications List causes that team's service metrics to appear in the Context Information area. For any team selected, the name of the team appears in parentheses in the view's title. In the example shown, the service metrics are displayed under the title "Services & Campaigns (Customer Service)" where the team name is "Customer Service."



Service Metrics view

Service Metrics for All Teams

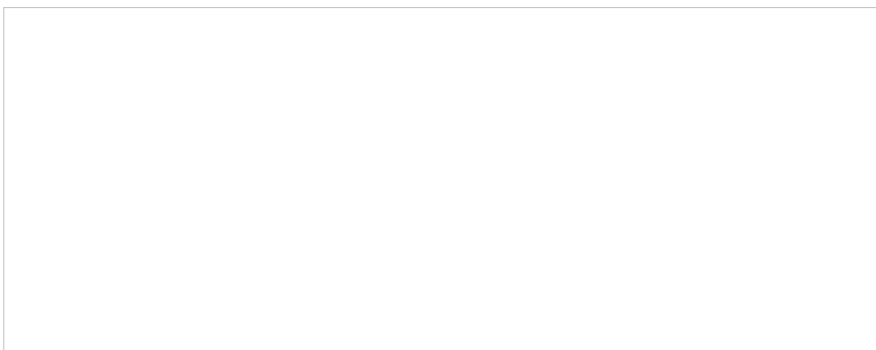
Selecting **All Teams** from the Active Communications List causes the service metrics for all teams for which the supervisor is assigned to appear in the Context Information area. You can tell, at a glance, that the view includes service metrics for all teams by looking at the view's title, which shows "All Teams" in parentheses.



Supervisors may view service metrics for all teams

How to Hide or Add Services

When you move your cursor over the service names, right-clicking or clicking the "down" icon will bring up a drop-down menu that gives several options. You can hide services, add services, hide all services, or restore the default view. If you do not remember the changes you made (i.e., you hid a service, want to add it back, but you do not remember the name of the service), you may restore the default view to make all services visible that were originally set in Agent Desktop.



The drop-down menu displays these options to hide or add services

To hide some services (e.g., hide overflow services assigned to your team in order to focus on your core services):

1. Mouse over the corresponding service name, and click the drop-down menu icon that will appear.
2. Select the **Hide service** option.

To add hidden services:

1. Mouse over the name of the service below which you wish the hidden service to appear, and click the drop-down menu icon that will appear.
2. Select the **Add service...** option. A list of service metrics will appear with checkboxes next to their names.
3. Locate the desired service in the list and select its checkbox.
4. Click **OK**.



Select the service metric(s) to add

[< Previous](#) | [Next >](#)

List of Service Metrics

This section provides detailed descriptions of the real-time metrics that apply to services and campaigns, which are displayed via the [Service Metrics View](#). Metrics are arranged in alphabetical order.

Note the following general considerations regarding service metrics:

- Unless noted otherwise, the terms *interactions*, *calls*, and *emails* in the metric descriptions shall be interpreted as interactions, calls, and emails *associated with the given service or campaign*.
- The term *agents* in the metric definitions shall be interpreted as *agents qualified to provide this service* (i.e., those who have the corresponding service skill with any level higher than zero). Note that because one service may be associated with more than one team, the agent-related service metrics (e.g., *Logged In*, *Ready*, *Occupancy*, etc.) may include agents that you are not assigned to supervise.

- Real-time metrics are updated as soon as the corresponding events take place. For example, *IN Received* will be updated when the call is received and the requested service is identified. Therefore, while there are calls in progress, the sum of reported call exits should not be expected to add up to the value reported by the *IN Received* metric.

Service Metric Descriptions

Busy

The *Busy* metric provides the number of agents who are currently handling interactions associated with any service. This metric includes agents in the After Call Work (ACW) state.

Busy Svc

Busy Svc provides the number of agents who are currently handling interactions associated with the given service. This metric includes agents in the ACW state with respect to such interactions.

CB Requested

CB Requested provides the number of inbound interactions that have requested callback.

CB Waiting

CB Waiting provides the number of callback requests that are currently waiting in the service queue.

IN ASA

For answered inbound calls and chats, *IN ASA* is the average time that the calls/chats waited in the service queue before being answered.

For replied inbound emails, *IN ASA* is the average time between email arrival and the sending of the first meaningful reply (acknowledgment is not considered a meaningful reply).

This metric is cumulative statistic calculated for all interactions since the reset time.

IN Active

IN Active provides the number of inbound interactions currently being actively handled by agents. This metric includes all inbound interactions in the agents' active communications list (ACL), except the ones in the ACW phase. Note that emails in agents' *My Queues* are not considered active and are not included in this count.

Note that in earlier versions of Bright Pattern Contact Center, the voice-only equivalent of this metric was called *IN Talking*.

IN Agent Disconnected

IN Agent Disconnected provides the number of inbound interactions that have been terminated by agents.

IN Avg Talk Time

This metric refers to *IN Total Talk Time* or *IN Handled*.

IN Carried Over

IN Carried Over provides the total number of emails that arrived at this service at any time before the reset time and remained unprocessed at the reset time. This metric includes both new emails and emails related to existing threads.

IN Carried Over - New

IN Carried Over - New provides the number of new inbound emails that arrived at this service at any time before the reset time and remained unprocessed at the reset time. This metric excludes emails related to existing email threads.

IN Closed

IN Closed provides the number of inbound emails that have been closed without reply by agents.

IN Desktop

IN Desktop provides the number of inbound emails that are currently saved in agents' *My Queues*.

IN EWT

IN EWT provides the estimated wait time (EWT) for inbound interactions.

IN Handled

IN Handled provides the number of inbound interactions that have been handled and completed by agents. This metric will count all instances of possible transfers and conferences as separate interactions.

For emails, this metric includes *IN Replied*, *IN Closed*, *IN Transferred*, and *IN Svc Changed*.

IN Handled New

This metric applies to emails only and counts only new emails that have been handled by agents. Note that this metric excludes emails related to existing email threads.

IN Handled Unique

IN Handled Unique provides the number of unique inbound interactions that have been handled by agents. Unlike *IN Handled*, this metric will only increase the count when an interaction is accepted by the first agent.

IN Handled Unique %

IN Handled Unique % provides the percentage of *IN Handled Unique* relative to *IN Received*.

IN IVR Abandoned

IN IVR Abandoned provides the number of inbound calls that have been terminated by callers while being processed by an IVR application. This metric does not include the *IN Self Serviced*.

IN IVR Dropped

IN IVR Dropped provides the number of inbound calls that have been disconnected by the system while being processed by an IVR application.

IN in IVR

IN in IVR provides the number of inbound calls that are currently being processed by an IVR application.

IN in Progress

IN in Progress provides the number of inbound interactions that are currently in processing at any stage, except ACW. For email, this metric includes email replies saved as drafts in agents' *My Queues*.

IN Max Wait

IN Max Wait provides the current wait time of the longest of the interactions currently waiting in the service queue. This metric includes callback requests, but it does not include preview records. This metric is currently not available for emails.

Note that an interaction can be requeued for another service either automatically or manually. In this case, the metric shows the interaction for the service it is currently waiting for but calculates the total waiting time since the moment the interaction entered the first service queue.

IN Queue Abandoned

IN Queue Abandoned provides the number of inbound interactions that have been terminated by the origination party while waiting in the service queue. This metric includes unanswered callbacks but it does not include the *IN Queue Sh-Abandoned* metrics.

IN Queue Abandoned %

IN Queue Abandoned % provides the percentage of *IN Queue Abandoned* relative to *IN Queued*.

IN Queue Dropped

IN Queue Dropped provides the number of inbound interactions that have been disconnected by the system while waiting in the service queue.

IN Queue Sh-Abandoned

IN Queue Sh-Abandoned provides the number of inbound interactions that have been terminated by the origination party while waiting in the service queue before the configured Service Level threshold.

IN Queue Sh-Abandoned %

IN Queue Sh-Abandoned % provides the percentage of *IN Queue Sh-Abandoned* relative to *IN Queued*.

IN Queued

IN Queued provides the number of inbound interactions that have entered the service queue. This metric includes callback requests, but it does not include preview records. If the same interaction enters the service queue multiple times, it is counted multiple times.

IN Queued Unique

IN Queued Unique provides the number of unique inbound interactions that have entered the service queue since the reset time. This metric includes callback requests. Possible interaction re-entries into the same service queue are not counted.

IN Received

IN Received provides the number of inbound interactions that have requested this service since reset time. For emails, this metric includes both new emails and emails related to existing threads. Interactions received via transfer or service change are not included.

IN Received New

IN Received New provides the number of new inbound emails that requested this service since reset. This metric excludes emails related to existing email threads.

IN Rejected

IN Rejected provides the number of inbound interactions that have been either rejected or unanswered by agents.

IN Remote Disconnected

IN Remote Disconnected provides the number of answered inbound interactions that have been terminated by the origination party. This metric does not apply to email.

IN Replied

IN Replied provides the number of inbound emails that have been replied by the agents. Note that this metric counts only the first meaningful reply. Possible follow-up email messages related to previously replied emails are considered outbound emails and are counted by the *OUT Handled* metric.

IN Ringing

IN Ringing provides the number of inbound interactions that are currently being delivered to the agents.

IN Ringing Abandoned

IN Ringing Abandoned provides the number of inbound interactions that have been terminated by the origination party while being delivered to agents.

IN Ringing Dropped

IN Ringing Dropped provides the number of inbound interactions that have been terminated by the system while being delivered to agents.

IN Routed

IN Routed provides the number of inbound interactions that have been routed to agents. If an interaction was routed multiple times with the same service, it is counted multiple times.

IN Self Serviced

IN Self Serviced provides the number of inbound calls that have been terminated with a Self-Service indicator while being processed by an IVR application. For more information, see the description of scenario block *Self Service Provided* in the *Scenario Builder Reference Guide*.

IN Svc Change Received

IN Svc Change Received provides the number of inbound interactions that have been received via recategorization by agents. This metric does not include *IN Transfer Received*.

IN Svc Changed

IN Svc Changed provides the number of inbound emails that have been recategorized by agents (i.e., associated with another service). Note that this metric counts only the emails that the agent continues to process after recategorizing them. Recategorized emails that are transferred to another resource are counted by the *IN Transferred* metric.

IN Svc Level %

For inbound calls and chats, *IN Svc Level %* provides the percentage of interactions that have been answered within the predefined service level threshold relative to all answered and abandoned calls except the calls abandoned within that threshold.

For inbound emails, *IN Svc Level %* provides the percentage of emails for which the first meaningful reply was sent within the predefined service level threshold relative to all replied emails. (Acknowledgment is not considered a meaningful reply.) Note that the email service level threshold excludes the time that is outside of the hours of operation specified for the given service.

The percentage is calculated for the 20 most recent interactions. In addition to the current service level, the metric also provides information about the target service level and the configured threshold (in hours for emails; in seconds for other media types).

IN Total Abandoned

This metric provides the sum of these metrics: *IN IVR Abandoned* + *IN Queue Sh-Abandoned* + *IN Queue Abandoned* + *IN Ringing Abandoned*

IN Total Abandoned %

This metric provides the percentage of *IN Total Abandoned* relative to *IN Received*.

IN Total Talk Time

IN Total Talk Time provides the sum of talk times of *IN Handled*.

IN Transferred

IN Transferred provides the number of inbound interactions that have been transferred. This metric includes transfers to queues, direct transfers to other agents, and external transfers; it does not include *IN Svc Changed*.

IN Transfer Received

IN Transfer Received provides the number of inbound interactions that have been received via transfer. This metric does not include *IN Svc Change Received*.

IN Waiting

IN Waiting provides the number of inbound interactions that are currently waiting in the service queue. This metric includes callback requests, but it does not include preview records.

Logged In

Logged In provides the number of agents who are currently logged into the system.

Not Ready

Not Ready provides the number of agents who are currently in the *Not Ready* state.

OUT Abandoned

OUT Abandoned provides the number of outbound calls that have been terminated by customers at any stage before being connected to the agent. This metric applies to predictive and progressive campaigns.

OUT Abandoned %

OUT Abandoned % provides the percentage of *OUT Abandoned* relative to all outbound calls answered by customers. This metric applies to predictive and progressive campaigns.

OUT Active

OUT Active provides the number of outbound interactions currently being actively handled by agents. This metric includes all outbound interactions in the agents' active communications list (ACL), except for the ones in the ACW phase. Note that emails in agents' *My Queues* are not considered active and are not included in this count.

Note that in earlier versions of Bright Pattern Contact Center, the voice-only equivalent of this metric was called *OUT Talking*.

OUT Agent Disconnected

OUT Agent Disconnected provides the number of outbound interactions that have been terminated by agents. This metric does not apply to email.

OUT Answered %

OUT Answered % provides the percentage of call attempts that have been answered by the remote party relative to *OUT Dialed*. For predictive campaigns, this metric includes only the call attempts where live voice is detected.

OUT Avg Talk Time

This metric provides the average of the following metrics: *OUT Total Talk Time* and *OUT Handled*

OUT Dialed

OUT Dialed provides the number of call attempts that have been made.

OUT Handled

OUT Handled provides the number of outbound interactions that have been handled and completed by agents.

For emails, this metric includes both new outbound emails and possible follow-up email messages related to existing email threads. It does not include emails that have been started and discarded without sending.

OUT IVR Abandoned

OUT IVR Abandoned provides the number of outbound calls that have been terminated by customers while being processed by an IVR application. This metric applies to predictive and progressive campaigns.

OUT IVR Abandoned %

OUT IVR Abandoned % provides the percentage of *OUT IVR Abandoned* relative to all outbound calls answered by customers. This metric applies to predictive and progressive campaigns.

OUT IVR Dropped

OUT IVR Dropped provides the number of outbound calls that have been disconnected by the system while being processed by an IVR application. This metric applies to predictive and progressive campaigns.

OUT in Progress

OUT in Progress provides the number of outbound interactions that are currently in processing at any stage, except for ACW. For email, this metric includes unsolicited emails and follow-up messages saved as drafts in agents' *My Queues*.

Note that in earlier versions of Bright Pattern Contact Center, the voice-only equivalent of this metric was called *OUT Active*.

OUT Queue Abandoned

OUT Queue Abandoned provides the number of outbound calls that have been terminated by customers while waiting in the service queue. This metric applies to predictive and progressive campaigns.

OUT Queue Abandoned %

OUT Queue Abandoned % provides the percentage of *Out Queue Abandoned* relative to all outbound calls answered by customers. This metric applies to predictive and progressive campaigns.

OUT Queue Dropped

OUT Queue Dropped provides the number of outbound calls that have been disconnected by the system while waiting in the service queue. This metric applies to predictive and progressive campaigns.

OUT Rejected

OUT Rejected provides the number of outbound calls that have been either rejected or unanswered by agents. This metric applies to predictive and progressive campaigns.

OUT Remote Disconnected

OUT Remote Disconnected provides the number of established outbound interactions that have been terminated by the remote party. Note that this metric does not apply to email.

OUT Ringing

OUT Ringing provides the number of outbound calls that are currently being delivered to the agents. This metric applies to predictive and progressive campaigns.

OUT Ringing Abandoned

OUT Ringing Abandoned provides the number of outbound calls that have been terminated by the remote party while being delivered to agents. This metric applies to predictive and progressive campaigns.

OUT Ringing Dropped

OUT Ringing Dropped provides the number of outbound calls that have been terminated by the system while being delivered to agents. This metric applies to predictive and progressive campaigns.

OUT Routed

OUT Routed provides the number of outbound calls that have been routed to agents. This metric applies to predictive and progressive campaigns.

OUT Total Talk Time

This metric provides the sum of talk times of *OUT Handled*.

OUT Transferred

OUT Transferred provides the number of outbound interactions that have been transferred. This metric includes transfers to queues, direct transfers to other agents, and external transfers.

OUT Unattended

OUT Unattended provides the number of outbound calls that have been answered by the remote party and not connected to the agent within the *Unattended call timeout* specified in the campaign configuration. This metric applies to predictive and progressive campaigns.

OUT Unattended %

OUT Unattended % provides the percentage of *OUT Unattended* relative to all outbound calls answered by the remote party. This metric applies to predictive and progressive campaigns.

Note that both the timeout and the unattended call percentage may be subject to regulation by government agencies. Note also that the unattended call percentage, also known as *abandonment rate*, is typically regulated over a longer period of time (e.g., 30 days in case of FCC). Therefore, it is generally recommended to monitor this metric using the historical *Telemarketing Compliance Report*, regulate the campaign calling rate using the *Target occupancy* setting in the campaign configuration, and observe the immediate effect using this real-time metric.

Occupancy

Occupancy provides the percentage of time agents that have spent handling interactions of the given service (including the preview time and after-call work) relative to their total working time (i.e., the time the agents have spent handling interactions of any service and being *Ready* to handle interactions).

Ready

The *Ready* metric provides the number of agents who are currently in the *Ready* state.

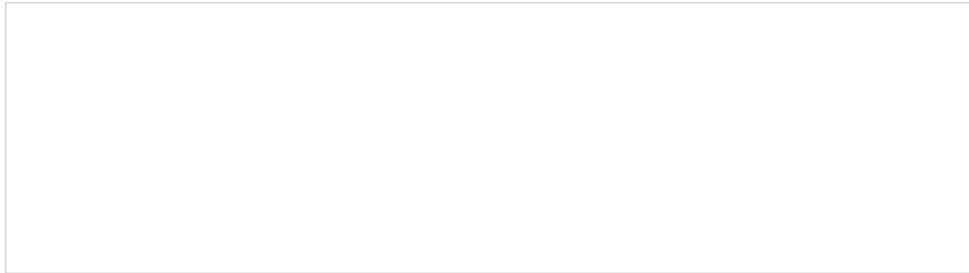
[< Previous](#) | [Next >](#)

Skill Metrics View

For each service that is displayed in the service metrics view, you can view a subset of metrics related to each individual skill within that service.

To view skill metrics for a particular service, click anywhere within the row of metrics dedicated to the desired service, except for on the service name. (The latter is reserved for hiding unwanted services as explained in the previous section.)

A new window will open showing metrics for each individual skill related to the selected service.



Skill Metrics view

You can move the skill metrics window to any other location on your Agent Desktop screen. To close the skill metrics window, click anywhere outside of this window.

For detailed description of skill metrics, see section [List of Skill Metrics](#).

Note that skill metrics view is not available for email services.

[< Previous](#) | [Next >](#)

List of Skill Metrics

This section provides detailed descriptions of the real-time metrics that apply to individual skills associated with a selected service and that can be displayed via the [Skill Metrics View](#). Metrics are arranged in alphabetical order.

Note the following general considerations regarding skill metrics:

- Unless noted otherwise, the terms *interactions* in the metric descriptions shall be interpreted as *interactions that requested (1) the service for which the skill metric view is displayed AND (2) the given skill within this service*.
- The term *agents* in the metric definitions shall be interpreted as *agents who have (1) the service skill for which the skill metric view is displayed AND (2) the given skill*. Note that since one service may be associated with more than one team, the agent-related skill metrics (*Logged In* and *Ready*) may include agents that you are not assigned to supervise

Skill Metric Descriptions

IN Active

IN Active provides the number of inbound interactions currently being actively handled by agents. This metric includes all inbound interactions in the agents' Active Communications List (ACL) except the ones in the ACW phase.

IN Max Wait

IN Max Wait provides the duration of the currently longest waiting interaction in the service queue. This metric includes callback requests.

IN Waiting

IN Waiting provides the number of inbound interactions that are currently waiting in the service queue. This metric includes callback requests.

Logged In

Logged In provides the number of agents who are currently logged into the system.

Ready

Ready provides the number of agents who are currently in the *Ready* state.

[< Previous](#) | [Next >](#)

Agent Metrics View

The agent metrics are displayed in the lower right pane of the Agent Desktop application. Agents are listed in alphabetical order and by default, this view will show only the agents who are currently logged in to Agent Desktop. If you wish to see the current day's metrics for the agents who are logged out, select the **logged-out users** checkbox.

Agents (All Teams)

If you have been assigned to supervise more than one team, and if you have the privilege "All assigned teams combined view," then you may see metrics for all agents at once. The agent metrics are displayed in the lower right pane of the Agent Desktop application in the section labeled *Agents (All Teams)*.

Not only does this view show agents from all teams assigned to the logged in supervisor, this view also displays the following metrics:

- Agent state icon
- Time in State
- *Not Ready* reason (if available)
- Team
- Interactions

The *Agents (All Teams)* view shows all services that the teams are assigned to (note that individual services can be hidden, if needed), specifically the following metrics:

- Calls in Queue
- Service Level
- Number of Agents in Queue
- Number of Ready Agents
- Current Max Wait Time (for calls in Queue)

The number of agents on display is limited to 100. This is a contact center-specific limit that may be adjusted by your service provider.

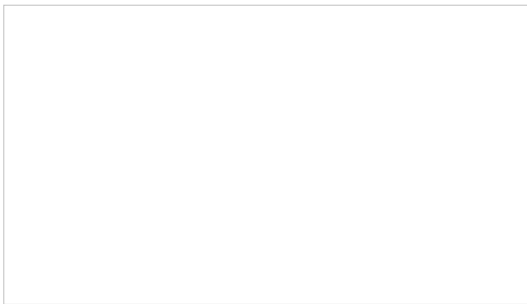
Note that your ability to see agents from all assigned teams is controlled by your service provider. See your service provider for more information.

Subteams

A subteam is a subset of agents from one team that is assigned to a supervisor. In Agent Desktop, a user who has been granted the supervision privilege *Define/View subteams of selected agents* can select agents from a larger team to be on a subteam. Supervisors may also switch between subteam view and full team view in order to focus their attention on real-time metrics for specific agents within a large group. In addition, supervisors with such privilege may request agent reports for selected agents, as well as send internal chat broadcasts to agents in selected subteams or teams. This capability makes it easier for supervisors to monitor and track a specific range of agents on a team.

Viewing Subteams

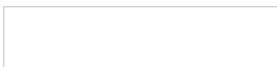
A supervisor may switch between full team view and subteam view by selecting the *my subteam only* checkbox.



Select the checkbox to view only agent metrics for the subteam

Subteam Editing Mode

A supervisor looking at a team in may switch to Subteam Editing mode by clicking the pencil icon that appears when hovering the mouse cursor over the *my subteam only* checkbox or its label.

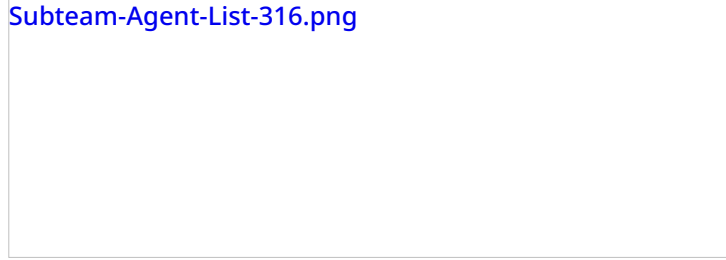


Adding and Removing Agents

Supervisors can select agents using checkboxes from the entire list of agents. The list may show logged out agents if the corresponding *logged out users* checkbox is selected. OK and Cancel buttons appear to enable exit from Subteam Editing mode.

To add agents to a subteam, select the checkbox beside each agent listed on the team. Likewise, to remove agents from a subteam, unselect the checkbox beside each agent listed on the team.

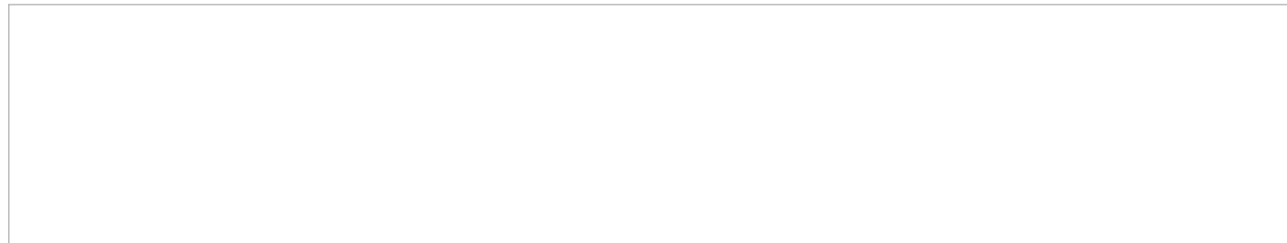
[Subteam-Agent-List-316.png](#)



See the *Reporting Reference Guide*, section [Agent Activity Report](#), for information on viewing subteam metrics in reports.

Sorting

You can have agents sorted automatically by the value of any currently displayed metric. The current sorting parameter will have the sorting icon displayed ☐ next to the metric name. By default, agents are sorted alphabetically.



Agent Metrics view

Icons

The current agent state is displayed as an [icon](#) next to the agent name. To view the current agent states in text form, select **Agent State** from the list of the available [agent metrics](#). For the *Not Ready* state, the Agent State column will also display the current *Not Ready* reason if such a reason is configured in your system. For detailed descriptions of agent states, see the Bright Pattern Contact Center *Agent Guide*, section [Understanding and Handling Your States](#).

If an agent is handling an interaction, the interaction type is displayed as an icon next to the agent's *Busy* or *After Call Work* state.

The interaction state icons have the following meanings:

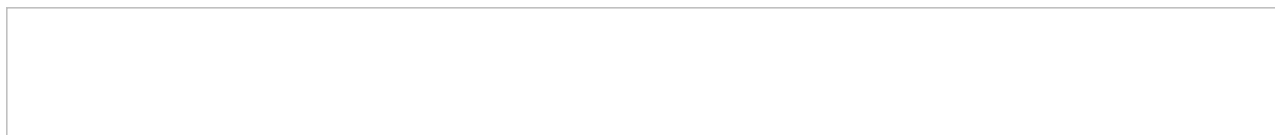
- ☐ Outbound interaction in progress (dialing, talk or hold)
- ☐ Inbound interaction in progress (ringing, talk or hold)
- ☐ The customer has disconnected from interaction and the agent is performing After Call Work related to this interaction.

- ☐ The call is on hold.

Note: If your team includes members who are not agents or supervisors, their current status will be displayed using a different set of icons, which simply indicate users' availability to communicate. For detailed descriptions of such non-agent statuses, see the Bright Pattern Contact Center *Agent Guide*, section [How to Use the Directory](#).

Multiple Interactions

Note that an agent may have more than one active interaction on Agent Desktop. If the agent is handling multiple interactions, the displayed value relates to the interaction that is currently in focus at the agents' desktop (i.e., selected in the agent's *Active Communications List*). The number of the agent's current active interactions is reported via the *Active* metric. If this metric shows more than one interaction for a particular agent, clicking on the value of this metric will "unfold" the agent's row into a list showing information about all interactions that are being handled by the given agent.



Agent Metrics View showing multiple current interactions for one agent

For detailed descriptions of the available agent metrics, see section [List of Agent Metrics](#).

[< Previous](#) | [Next >](#)

List of Agent Metrics

This section provides detailed descriptions of the real-time metrics that apply to agents and can be displayed via the [Agent Metrics View](#). Metrics are arranged in alphabetical order.

Active

The *Active* metric provides the number of interactions that are currently being actively handled by the agent. This metric includes all interactions in the agents' Active Communications List (ACL), including the ones in the ACW stage. Emails in agents' *My Queues* are not considered active and are not included in this count.

If an agent has more than one active interaction, clicking on the value of this metric will "unfold" the agent's row into a list showing information about all interactions that are currently being handled by this agent.

Note that in earlier versions of Bright Pattern Contact Center, the related metrics used to be called *# Calls* and *# Chats*, and email *My Queue* used to be called *Personal Queue*.

Agent Login Time

Agent Login Time shows how much time has elapsed since the moment that the agent logged on to the system.

Agent State

Agent State displays the current agent state in text form. For the *Not Ready* state, this metric includes the reason for not being ready, if available. Note that the same information is shown as an icon preceding agent's name. Agent states and icons are explained in detail in the Bright Pattern Contact Center *Agent Guide*, section *Understanding and Handling Your States*.

Avg Idle Time

Avg Idle Time provides the average time that the agent has spent in the *Ready* state in between handling of service interactions.

Avg Preview Time

Avg Preview Time provides the average time that the agent has reviewed records of previewed outbound campaigns, from the moment the preview record was accepted by the agent and until it was either dialed or skipped.

Avg Reply Time

Avg Reply Time provides the average time between email arrival in the agent's *My Queue* and the moment when the first meaningful reply leaves the agent's *My Queue*.

Hold

- For calls, *Hold* provides the total time that the agent has had the current call on hold.
- For emails and chats, *Hold* provides the total time that the agent has had the current interaction out of focus.
- If the agent is handling multiple interactions, the displayed *Hold* value relates to the interaction that is currently selected in the agent's Active Communications List.

IN Active

IN Active provides the number of active inbound interactions for this agent. For more information, see the description of the *Active* agent metric.

IN Breached SLA

IN Breached SLA provides the number of inbound emails in the agent's *My Queue* that have breached SLA (i.e., whose total processing time since arrival has exceeded the predefined service level threshold).

IN Carried Over

IN Carried Over provides the number of emails that were delivered to this agent by any method at any time before the reset time and that remained unprocessed at the reset time.

IN Closed

IN Closed provides the number of inbound emails that the agent has closed without reply.

IN Desktop

IN Desktop provides the number of inbound emails currently saved in the agent's *My Queue*.

IN Handled

IN Handled provides the number of inbound interactions that have been handled and completed by the agent.

For emails, this metric includes values for the following metrics:

- *IN Replied*
- *IN Closed*
- *IN Transferred*
- *IN Svc Changed*

IN Handled New

This metric applies to emails only and counts only new emails that have been handled by the agent (emails related to existing email threads are excluded).

IN Offered

IN Offered provides the number of inbound emails that have been pushed to the agent.

IN Pulled

IN Pulled provides the number of inbound emails that the agent has pulled from the service queues.

IN Rejected

IN Rejected provides the number of inbound interactions that have been either rejected or unanswered by the agent.

For emails, this metric includes inbound emails that were pushed to the agent and not accepted (returned to queue or transferring agent). It does not include emails that were accepted using the Postpone button.

IN Replied

IN Replied provides the number of inbound emails that the agent has replied to. Note that this metric counts only the first meaningful reply. Possible follow-up email messages related to previously replied emails are considered outbound emails and are counted by the *OUT Handled* metric.

IN Svc Changes

IN Svc Changes provides the number of inbound emails that the agent has recategorized (i.e., associated with another service). Note that this metric counts only the emails that the agent continues to process after recategorizing them. Recategorized emails that are transferred to another resource are counted by the *IN Transferred* metric.

IN Transferred

IN Transferred provides the number of inbound emails that the agent has transferred, including transfers to queues and direct transfers to other agents. This metric does not include *IN Svc Changed*.

Interaction

Interaction provides the remote party's name (if known) for the interaction that the agent is currently handling.

If the agent is handling multiple interactions, the displayed value relates to the interaction that is currently selected in the agent's Active Communications List. See also the description of metric *Active* above.

OUT Agent Disconnected

OUT Agent Disconnected provides the number of outbound interactions handled by this agent that have been terminated by the agent. This metric does not apply to email.

OUT Desktop

OUT Desktop provides the number of outbound emails currently saved in the agent's *My Queue*.

OUT Discarded

OUT Discarded provides the number of outbound emails that the agent has started and subsequently discarded (deleted without being sent). Outbound emails include unsolicited emails and possible follow-up email messages related to previously replied to emails.

OUT Handled

OUT Handled provides the number of outbound interactions that have been handled and completed by the agent.

For emails, this metric includes both new outbound emails and possible follow-up email messages related to existing email threads.

OUT Rejected

OUT Rejected provides the number of predictive outbound calls that have been either rejected or unanswered by the agent.

OUT Remote Disconnected

OUT Remote Disconnected provides the number of outbound interactions handled by this agent that have been terminated by the remote party. Note that this metric does not apply to email.

OUT Transferred

OUT Transferred provides the number of outbound interactions that the agent has transferred.

Occupancy

Occupancy provides the percentage of time that the agent has spent handling interactions (including the preview time and After Call Work) relative to the agent's total working time (i.e., the time that the agents have spent handling interactions and being *Ready* to handle interactions).

Preview Duration

Preview Duration provides the time elapsed since the current preview record was opened by the agent.

Previewed

Previewed shows the number of preview records handled by the agent, including both dialed and skipped records.

Rec

Rec indicates whether the currently active call is being recorded.

Service

Service provides the name of the service associated with the interaction that the agent is currently handling.

If the agent is handling multiple interactions, the displayed value relates to the interaction that is currently selected in the agent's Active Communications List.

Skipped

Skipped provides the number of preview records skipped by the agent.

Skipped %

Skipped % provides the percentage of *Skipped* records relative to *Previewed*.

Talk

- For calls, *Talk* provides the total time that the agent has spent talking on the current call. This metric excludes hold time.
- For emails and chats, total time that the agent has had the current interaction in focus.

If the agent is handling multiple interactions, the displayed value relates to the interaction that is currently selected in the agent's Active Communications List.

Time in State

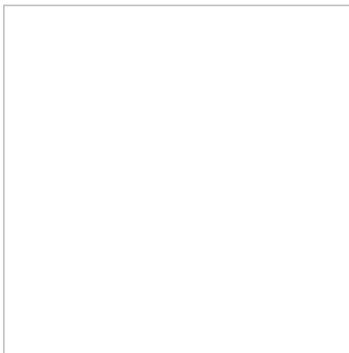
Time in State provides the time elapsed since the last agent's state change.

[< Previous](#) | [Next >](#)

Real-Time Metric Alerts

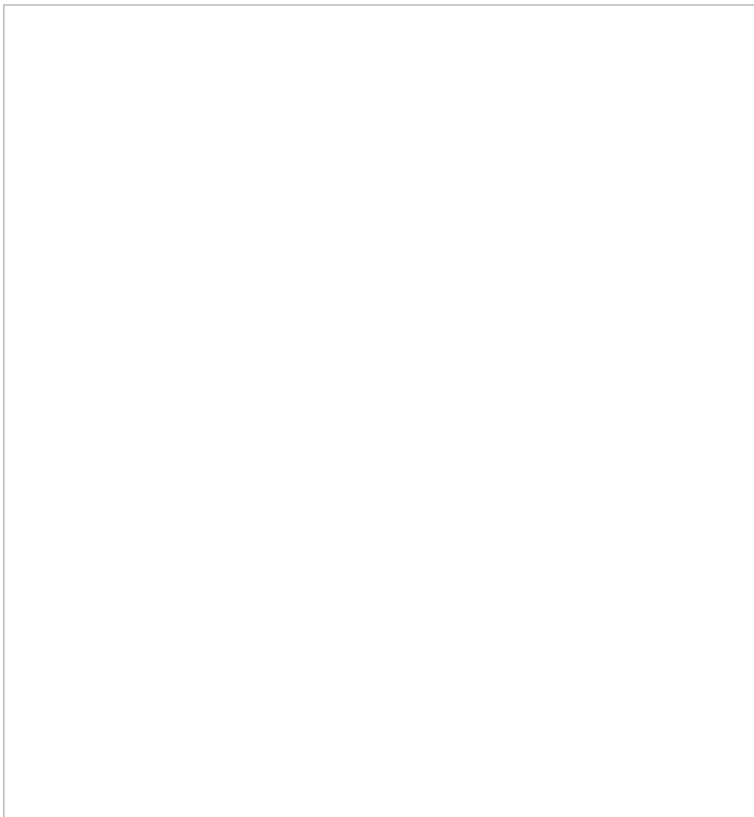
You can set thresholds for some of the service, campaign, and agent metrics and be visually alerted whenever the current values of the corresponding metrics reach those thresholds.

Visual alerts are provided in two forms: a pop-up window and a color change in the metrics view. You can configure a different alert color for each metric and choose whether the text or the background of the corresponding cell will be highlighted with this color.



How to Set Threshold Values

1. Click the **Settings** in the upper right corner of the Agent Desktop.
2. Select **Alert Configuration** from the drop-down menu.
3. Click the name of the statistic for which you would like to set or change the threshold.
4. Enter the desired threshold value.
5. Select the color of the text or the background (or both) as it shall appear when the actual metric value reaches the specified threshold.
6. Click **Apply**.



Alert configuration

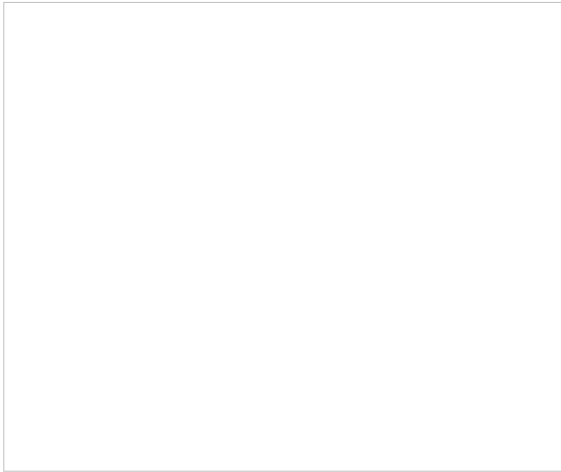
Whenever a configured threshold is reached for a specific metric:

- A pop-up window will be displayed with the metric name and its actual current value.
- The actual real-time value of this metric will be highlighted with a selected color in the metrics view. When the actual value drops below the threshold, the alert will be cleared, i.e., the metric value will again be displayed with the regular color.

How to Set System-Wide Thresholds

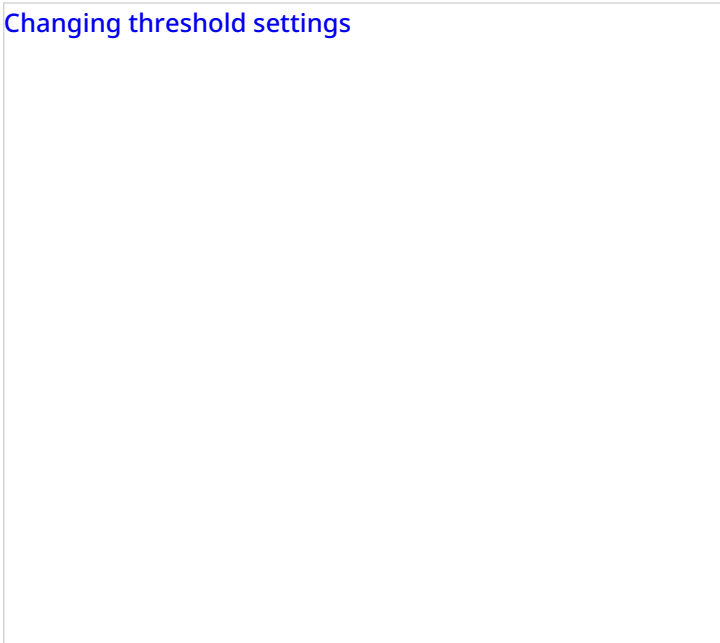
Depending on your privileges, you may be able to make the thresholds that you define available system-wide (i.e., to all other supervisors in your contact center). Note that they may still be able to customize these thresholds for their own desktops. To apply your thresholds system-wide, click the **Set as System Default** button.

For example, supervisor Allen Hartzell decides to monitor how long agents on his team are in the *Not Ready* state. From the Agent Desktop, in **Supervising** mode, he navigates to his **Alert Configuration** settings to change the threshold value for the *Not Ready* state.



The supervisor changes the threshold value for the *Not Ready* state by checking the **Custom** and **Notification** boxes and changing the threshold to > **5:00**. With this threshold, Allen will be notified when any agent on his team is in the *Not Ready* state for more than 5 minutes.

Changing threshold settings



When agent Christy Borden was not ready for at least 5 minutes, the following pop-up message appeared on the supervisor's Agent Desktop screen.

Pop-up notification

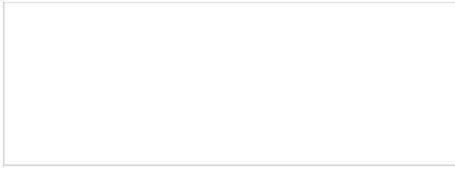
[< Previous](#) | [Next >](#)

Changing Agent State

As a supervisor, you can change the current state of any agent of your team. For example, if the Service Level drops below the specified threshold, you can force some agents to become [Ready](#) while they are in the [After Call Work](#) state in order to speed up the distribution of calls waiting in the service queue. You can also force an agent to log out.

To change an agent state:

1. Click the **Agent State** icon in the [Agent Metrics View](#).
2. Select the desired agent state from the drop-down menu. Note that forced state changes may or may not be available depending on the current agent activity. For example, no forced state changes will be permitted for agents actively handling service interactions.



Changing agent state

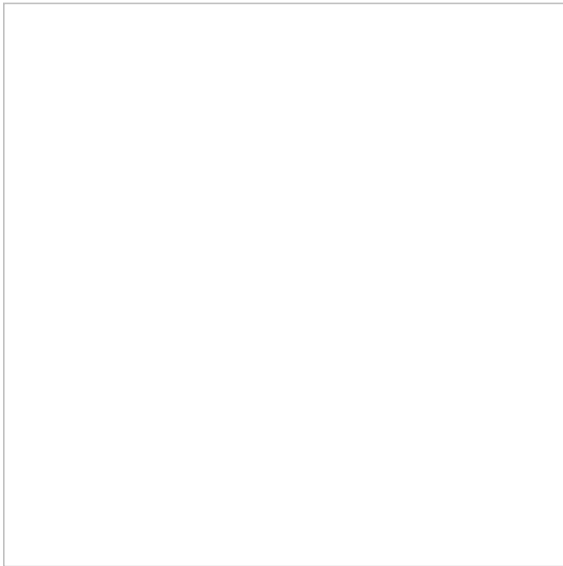
[< Previous](#) | [Next >](#)

Individual Chat

At any time during your working session, you can send a chat message to any member of your team as well as to a member of another team.

To send a chat message:

1. Select a contact from the [Directory](#). If the system supports chat communication with the selected contact, the *Chat Dialog Window* and the *Chat Input Window* will appear in the *Contact Info Panel*.
2. In the *Chat Input Window*, type the message you wish to send to the selected contact and press the **Enter** key.
You can mark the message as urgent by clicking the ☐ icon below the *Chat Input Window*.



Individual chat

The message and the time of its entry will appear in the *Chat Dialog Window*. Urgent messages will have the (!) sign in front of them and their time stamps will be highlighted in red. The *Active Communications List* will display the chat session with the contact name and the chat session icon.

When the contacted party replies, his or her messages will appear in the *Chat Dialog Window*.

To close the chat session:

Click the ☐ icon that appears when you move the mouse cursor over this session in the *Active Communications List*.

To see the content of a recent internal chat:

Select the chat session with the contact name from the *Recent* tab.

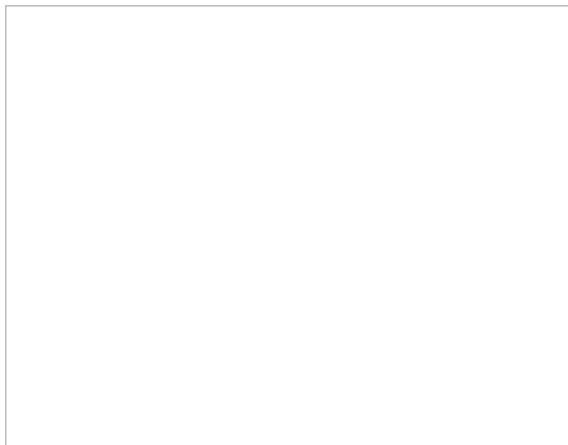
[< Previous](#) | [Next >](#)

Team Chat

At any time during your working session, you can broadcast a chat message simultaneously to all agents who are members of your team. Each agent will receive such a message as a regular internal chat message and will be able to reply to it individually.

To broadcast a chat message:

1. From the *Active Communications List*, select the team that will receive your broadcast message. The name of the selected team, the *Chat Dialog Window*, and the *Chat Input Window* will appear in the *Contact Info Panel*.
2. Follow the instructions of the [Individual Chat](#) section to type and send the chat message and carry on chats with individual agents who may reply.



Team chat

To see the content of a recent team chat:

Select the chat session with the team name from the *Recent* tab.

[< Previous](#) | [Next >](#)

Call Recording

As a supervisor, you can record conversations of any members of your team with customers and with each other. Call recording can be activated at any moment. Call recordings are stored in the system and can be reviewed at a later time. See section [Quality Management](#) for more information.

To record a call, select an agent from the [Agent Metrics View](#) in the right pane. The agent must be handling a service call and be in the [Busy](#) state.

The *Contact Info Panel* will display various active management controls, including the call recording button ☐. Note that depending on your configuration and call center practices, some or all calls may be recorded automatically as soon as they are established. Agents also may have privileges to start call recordings. If the call is already being recorded, the call recording button will display the *pause recording* function ☐ or the *stop recording* function ☐.

How to Start and Stop Recording

To begin recording:

Click the **Start Recording** ☐ button. The button will change its function to **Stop recording**.

To pause recording:

Click the **Pause Recording** ☐ button. The button will change its function to **Pause recording**.

To stop recording at any time:

Click the **Stop recording** ☐ button. Otherwise, the call recording will stop automatically when the call is released.

[< Previous](#) | [Next >](#)

Call Monitoring, Coaching, and Barge-In

As a supervisor, you can connect to a service call handled by any member of your team. You can do this in order, for example, to monitor the quality of service or to help an agent with a difficult call. Note that the agent may send you a chat message (see section [Individual Chat](#)) or flag a call that the agent needs immediate help handling. When the call is flagged, you will see the flag icon next to the agent's state in the *Agent Metrics View*.



Flagged call in Agent Metrics View

Depending on the purpose, you can select one of the following three connection modes:

- **Monitor** - In this mode, you can hear the conversation between the agent and the customer, but neither of them can hear you. Note that the agent will not have any indication that his call is being monitored. However, if you wish to make a suggestion for the agent, you can do this using chat.

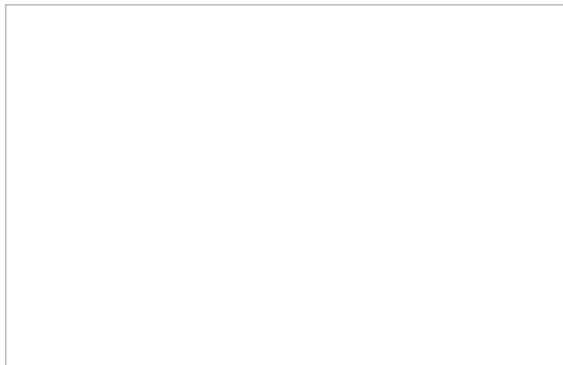
- **Coach** - In this mode, you can hear the conversation between the agent and the customer, and you can talk to the agent. The agent will hear you, but the customer will not.
- **Barge-in** - In this mode, both the customer and the agent will hear you and will be able to talk to you.

You can connect to a service call using any of the above modes, and you can switch from one mode to another at any time and any number of times during the same call. For example, if an agent sends you a chat message requesting help with a difficult call, you can first listen to the call in *Monitor* mode and then, depending on your assessment of the situation, either switch to *Coach* mode to provide instructions to the agent or activate *Barge-in* mode to participate actively in the conversation with the customer.

How to Turn On/Off Supervision Modes

To activate one of the supervision modes:

- Select an agent from the [Agent Metrics View](#) in the right pane of Agent Desktop. The agent must be handling a service call and be in the [Busy](#) state.
- The *Contact Info Panel* will display the monitoring functions.
 - If the *Monitor/Coach/Barge-in* button displays the desired supervision mode, click the button.
 - If you wish to be connected in a different supervision mode, click the arrow section of the *Monitor/Coach/Barge-in* button, and select the desired supervision mode from the drop-down menu.



Call Monitoring and Pull Screen controls

When you are connected to a call in a particular supervision mode, the *Monitor/Coach/Barge-in* button will display the “next” supervisor mode (i.e., if the current mode is *Monitor*, the button will display *Coach*, and so on).

- To switch to this “next” mode, click the button itself.
- To switch to a different supervision mode (e.g., from *Monitor* directly to *Barge-in*), click the arrow section of and select the desired supervision mode from the drop-down menu.

The system will automatically start call recording as soon as you connect to this call in any supervisor mode. Note also that the system supports simultaneous monitoring of one agent by more than one supervisor.

To stop the supervision activity for this call:

Click the **End Call** button.

How to View Agents' Context Information Area

At any time during call supervision, you can view the content of the *Context Information Area* of the monitored agent's desktop. If this area is used to show any customer data related to the call, this may help you understand the context of the agent-customer interaction. To get the content of the *Context Information Area* of the agent's desktop, click the **Pull screen** button ☐.

Note that the screen you will see is the screen that the agent received via [screen pop](#) (i.e., if the agent has changed screens after the initial screen pop, you will not see those changes). To monitor an agent's screen in real time, use the [screen monitoring function](#).

[< Previous](#) | [Next >](#)

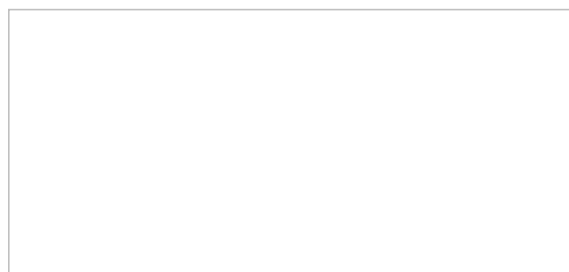
Continuous Agent Monitoring

As a supervisor, you can continuously monitor calls of a selected member of your team. When you activate this function, monitoring of all subsequent calls made or received by this team member will start automatically.

To set continuous monitoring for a particular agent:

1. Select the desired agent from the [Agent Metrics View](#) in the right pane of Agent Desktop. The *Contact Info Panel* will display the [monitoring functions](#).
2. Select the **keep monitoring this agent** checkbox.

Note that you can only continuously monitor one agent at a time. Thus, if you activate this function for another agent, monitoring of the originally selected agent will stop.



Continuous agent monitoring

To stop monitoring the agent:

Simply deselect the checkbox.

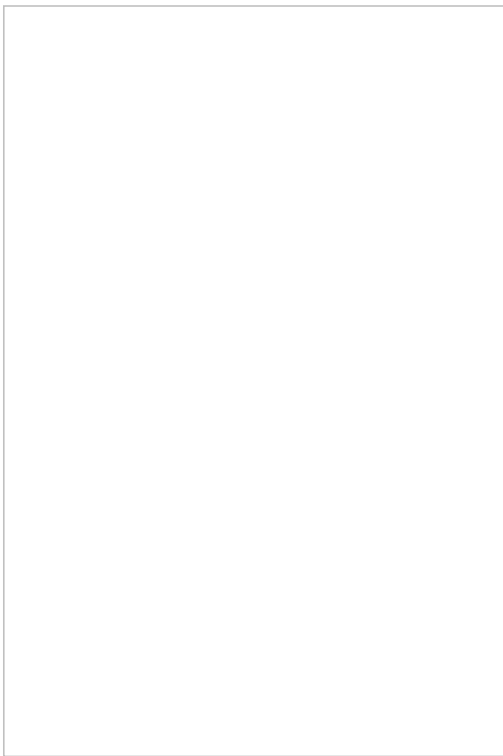
[< Previous](#) | [Next >](#)

Grading Calls in Progress

You can grade various aspects of your agents' performance while monitoring their calls. The assigned grades will be stored as part of the historical call detailed record and will be visible to other managers of your contact center with corresponding privileges.

To grade a call that you monitor:

1. Click the **Grade** button next in the *Contact Info Panel*.
2. Select grades for the desired categories.
3. If necessary, type a free-form comments about the call in the *Notes* field.
4. Click **Ok**.



Grading categories and notes

Note: The call grading categories are customizable and may differ from the ones shown above. If in doubt about the purpose of a specific category, contact your administrator.

[< Previous](#) | [Next >](#)

Agent Screen Monitoring

Depending on your system configuration, you may also be able to view screens of selected members of your team and monitor their desktop actions in real time. You can activate this function for a logged-on agent at any time even when the agent is not handling any interactions. Thus, this function can be complimentary to the call monitoring, or it can be used on its own. The agents will not receive any indication that their screens are being monitored.

To begin screen monitoring:

1. Select the desired agent from the [Agent Metrics View](#) in the right pane of Agent Desktop. The *Contact Info Panel* will display the [monitoring functions](#).
2. Click the **See Screen** button . A new window will open, showing you the desktop of the selected agent.

Note that you can only continuously monitor a screen of one agent at a time. Thus, if you activate this function for another agent, monitoring of the originally selected agent will stop.

To stop monitoring the agent's screen:

Simply close the browser window.

[< Previous](#) | [Next >](#)

Managing Calendar Events

The Agent Desktop application is equipped with a calendar that agents can use to schedule various tasks and events related to their work, such as follow-up calls with customers. For general information about the calendar, see the Bright Pattern Contact Center *Agent Guide*, section [Using the Calendar](#).

Working with Agent Calendars

In addition to using your own calendar for your personal scheduled events (as a supervisor), you can also view calendars of members of your team and reassign their scheduled tasks to other agents.

To view an agent's calendar:

1. Select the desired agent from the directory or from the [Agent Metrics View](#) in the right pane of Agent Desktop. The *Contact Info Panel* will display the agent management functions.
2. Click the **Show Agent's Calendar** button . The agent's calendar will be displayed in the *Context Information Area*.

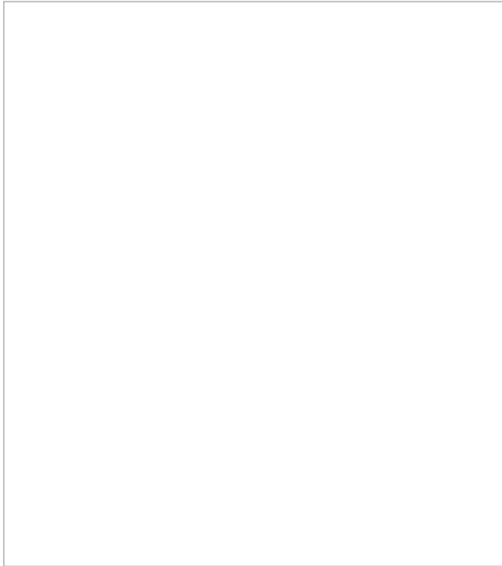
To reassign a single agent's task to another agent:

1. Select the desired task in the calendar grid. The panel on the right display the task information and related controls.
2. Click the **Assign...** button. A dialog window will appear, showing the list of agents to which this task can be assigned.
3. Select the desired agent and click **Ok**.

Sometimes it may be more convenient to reassign all of the agent's tasks within a time range in a single step.

To reassign all of one agent's tasks to another agent:

1. Click the **Reassign by range...** button. A dialog window will appear showing the list of agents that this task can be assigned to and time range controls.
2. Specify the desired time range.
3. Select the desired agent.
4. Click **Ok**.



Calendar event reassignment controls

[< Previous](#) | [Next >](#)

Quality Management

The Bright Pattern Contact Center system automatically stores transcripts of all chat sessions between your agents and customers, as well as content of all customer emails and agent responses. Depending on your contact center practices and types of service, any calls passing through the system can also be recorded automatically for compliance and quality assurance purposes. Depending on your service configuration, the system can also capture and store videos of agents' screens for the entire duration of their working sessions.

A different application called *Contact Center Administrator* is used to search for, review, and grade transcripts and recordings. If you need access to this application for quality assurance or similar purposes, contact your system administrator.

For detailed information about quality management functions that may be available to you via the Contact Center Administrator application, see the Bright Pattern Contact Center *Reporting Reference Guide*, section [Quality Management](#).

[< Previous](#) | [Next >](#)

General Information About Campaign Operation

As a campaign operator, you can use the Agent Desktop application to view [real-time metrics for the campaigns](#) that are assigned to you.

In addition, you can use Agent Desktop to do the following:

- [Start and stop](#) selected campaigns
- [View metrics for lists](#) associated with selected campaigns
- [Enable and disable lists](#) associated with selected campaigns
- [View metrics for agent teams](#) participating in a selected campaign

Those metrics and controls are displayed in the right pane of your Agent Desktop when you select the *Campaigns* option from the *Active Communications List*.

Note that in order to monitor and control a particular campaign, you must have the default *Campaign Operator* role or a custom role with privilege *Control campaign operations*, and you should be assigned as an operator for this campaign.

For general information about viewing real-time metrics, customizing metrics views, restoring the default views, and obtaining metric descriptions, see the following topics of section *Viewing Real-Time Metrics*:

- [General Information About Metric Viewing](#)
- [Understanding Real-time Metrics](#)
- [Customization of Metrics Views](#)

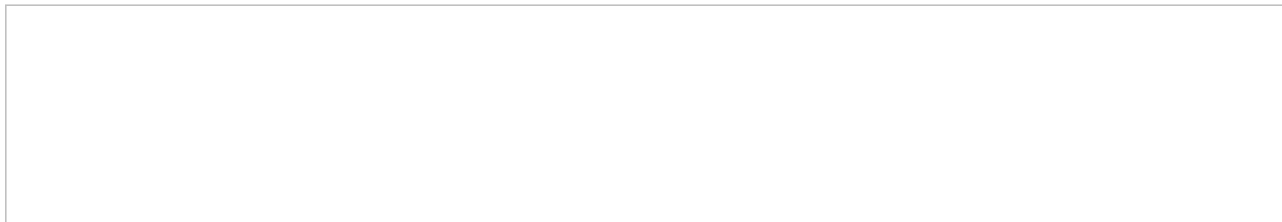
[< Previous](#) | [Next >](#)

General Campaign Metrics View

General campaign metrics are displayed in a table in the upper section of the right pane of your Agent Desktop. This general campaign metric view will list, in alphabetical order, all active campaigns assigned to you.

The current status of each campaign is indicated in the *Running* column.

The mode in which the campaign is configured to run is indicated in the *Mode* column.



General campaign metrics view

A campaign can run in one of the following modes:

- **Preview** - The calling records are submitted to the agents participating in the campaign. The agents are given a chance to review record information before dialing the destination numbers.

- **Predictive** - The system automatically dials numbers from list records according to currently optimal dialing rates, monitors call progress, and connects successful (answered) call attempts to available agents. The dialing rate is optimized to maintain the desired agent occupancy based on the statistical analysis of outcomes of most recent dialing attempts.
- **Progressive** - The system automatically dials numbers from list records according to a fixed (preconfigured) dialing rate, monitors call progress, and connects successful (answered) call attempts to available agents. Note that progressive mode is also used for a short period of time at the beginning of campaigns of the *Predictive* type (see above) until the system has enough real-time statistical input to enable the predictive algorithm.
- **Automatic (IVR)** - The system automatically dials numbers from list records, monitors call progress, and connects successful (answered) call attempts to a prerecorded IVR message. Agents are not involved in campaigns of this type.

More Information

For general information about real-time metrics, see section [Understanding Real-time Metrics](#).

For view customization, see section [Customization of Metric Views](#).

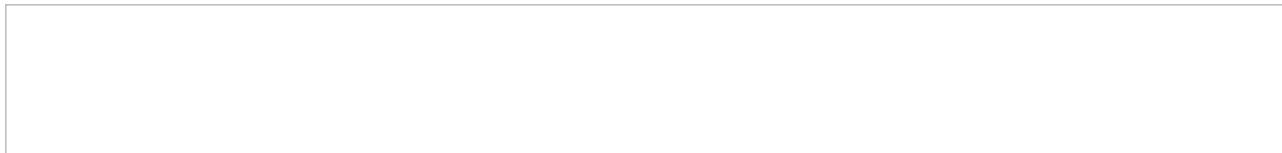
For detailed descriptions of the available campaign metrics, see [List of Campaign Metrics](#).

[< Previous](#) | [Next >](#)

Individual Campaign Metrics View

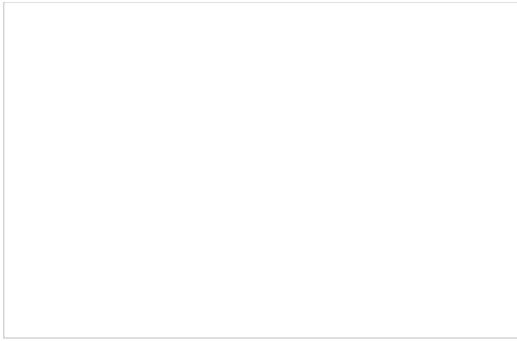
In addition to the general campaign view described in the previous section, you can define a custom metrics view for each campaign individually. To define a custom view for a particular campaign, first select this campaign in the general metrics view.

The name of the selected campaign will appear under the general campaign view with a predefined set of metrics.



Individual campaign metrics view

To make any changes in the current set of metrics, click the black triangle that appears next to a metric name when you mouse over it. A menu of customization options will appear.



Customization options

Customization Options

The following customization options are given in the pull-down menu.

- **Hide metric** allows you to hide the metric for which the menu was invoked.
- **Hide all metrics** allows you to hide all metrics currently present in the individual campaign view.
- **Add metrics** allows you to add any metric from the set of the available campaign metrics. Simply select **Add metrics** and select the desired metrics from the menu that appears. (You can use the green “+” sign for the same purpose.) The metrics in this menu are the same as in the [General Campaign Metrics View](#); for their descriptions, see section [List of Campaign Metrics](#)
- **Add disposition count** allows you to add a metric for the number of call attempts with a specific disposition since the beginning of the reporting interval. Simply select **Add disposition count** and select the desired disposition from the menu that appears. You can use the green “+” sign for the same purpose.
- **Add disposition %** allows you too add a metric for the percentage of call attempts with a specific disposition relative to the total number of call attempts made since the beginning of the reporting interval. Simply select **Add disposition %** and select the desired disposition from the menu that appears. You can use the green “+” sign for the same purpose.

[< Previous](#) | [Next >](#)

List of Campaign Metrics

This section provides detailed descriptions of the real-time metrics that apply to campaigns and that can be displayed via the [General](#) and [Individual](#) Campaign Metrics views. Metrics are arranged in alphabetical order.

Many metrics available for display in this view can also be displayed via the [Service Metrics View](#). If you cannot find the description of the desired metric in this section, see section [List of Service Metrics](#).

Note the following considerations regarding the general campaign metrics:

- The term *calls* in the metric definition shall be interpreted as *outbound calls associated with the given campaign*.
- The term *agents* in the metric definitions shall be interpreted as *agents qualified to participate in the given campaign* (i.e., those who have the corresponding skill with any level higher than zero). Note that because a campaign may be associated with more than one team, the agent-related service metrics (e.g., *Logged In*, *Ready*, *Occupancy*, etc.) may include agents that you are not assigned to supervise.

- The term *records* shall be interpreted as *records of all lists associated with the given campaign and enabled within this campaign*. Note that if any filters were applied to those lists when they were associated with the given campaign, the filtered-out records will be excluded from any of the following record-related metrics.

Metric Descriptions

ASR %

ASR % gives the Average Success Rate, which is defined as the percentage of successful call attempts out of the last several hundred call attempts made (250 attempts, by default). This metric is used to adjust the calling rate of a predictive campaign to achieve optimal occupancy of available agents without losing answered calls. Thus, the successful call attempt is defined as any call attempt that was answered and queued for delivery to an agent.

Attempted

Attempted provides the number of records that have been attempted, including the records that are currently being attempted.

Attempted %

This metric provides the percentage of *Attempted* records relative to *Total Records*.

Completed

Completed provides the number of records that have been completed (i.e., the records for which final dispositions have been set).

Completed %

Completed % provides the percentage of *Completed* records relative to the sum of *Completed* and *Remaining* records.

Dialable

Dialable provides the number of records within this campaign that can be dialed at this moment. Compare this metric to the *Total Remaining* metric that counts all records whose processing within this campaign has not finished. A difference between the two normally indicates that, even though you still have records to process, some of those records have been rescheduled for a future time and, therefore, you may have substantially fewer records that can be actually dialed at the moment. This metric excludes personally assigned records. Additionally, note that this metric has a calculation cap and will display ">X" for all values higher than the cap.

Est Duration

Est Duration provides the number of hours that the campaign is estimated to run within the current reporting interval (e.g., today) based on the current campaign statistics (i.e., assuming the same number of participating agents and same success rate).

Expired

Expired provides the number of records whose processing was finished because the time period during which those records could be called has expired. A record may be set to expire if, for example, the customer agreed to be contacted (opted in) for a limited period of time or to avoid any chance of calling numbers that may have been added to a national or regional/state do-not-call (DNC) list after they were imported into the system for dialing.

Mode

This metric shows the Campaign mode. See section [General Campaign Metrics View](#) for descriptions of the outbound campaign modes.

OUT Answered

OUT Answered provides the number of call attempts that have been answered by the remote party. This metric includes only the call attempts where live voice is detected.

OUT Call Rate

OUT Call Rate provides the number of calls initiated for this campaign in the last minute.

OUT Failed

OUT Failed provides the number of failed call attempts. Depending on campaign type and configuration, this metric may include attempts that have not been answered at all or the ones that have not been answered by a live person.

P. A. Completed

This metric provides the number of personally assigned records completed since the beginning of the campaign. This metric is meaningful for preview campaigns only.

P. A. Remaining

This metric provides the number of personally assigned records whose processing within this campaign has not finished. This metric is meaningful for preview campaigns only.

Running

Running indicates whether the campaign is currently running.

Total Completed

Total Completed provides the total number of records completed since the beginning of the campaign. This metric accounts for all lists that are currently enabled within this campaign. It includes records finalized by the DNC (see *Total DNC*) as well as personally assigned records.

Total Completed %

Total Completed % provides the percentage of *Total Completed* records relative to *Total Records*.

Total DNC

Total DNC provides the total number of records excluded from dialing since the beginning of the campaign because they matched records in the associated Do Not Call lists. This metric includes personally assigned records.

Total Records

This metric provides the total number of records in all currently enabled lists associated with this campaign. It includes personally assigned records but excludes records that are filtered out by the applied [filters](#).

Total Remaining

Total Remaining provides the total number of records, including personally assigned records, whose processing within this campaign has not finished. This metric accounts for all lists that are currently enabled within this campaign.

[< Previous](#) | [Next >](#)

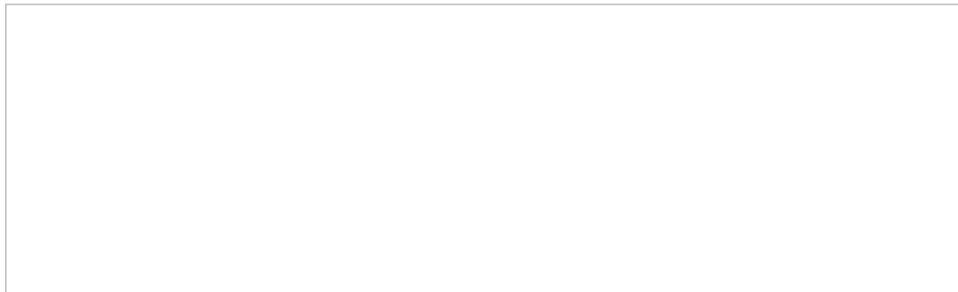
Quota Metrics View

If you are running a quota campaign, you can view real-time metrics specific to the configured quotas.

If quotas are configured for a campaign selected in the general campaign metrics view, the individual campaign view will have the clickable word *Quota* displayed next to the campaign name.

To open the quota metrics view:

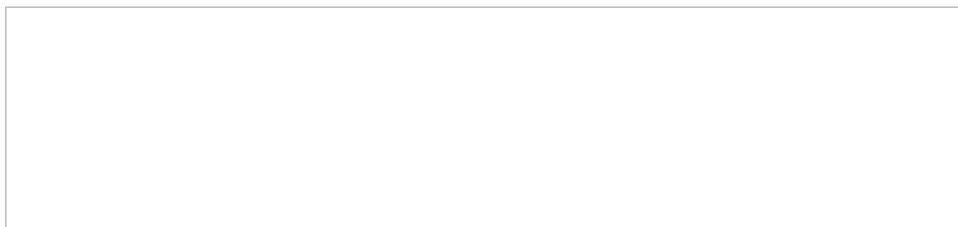
Simply click the **Quota** link. (See the highlighted link in the image shown.)



Link to the quota metrics view

The quota metrics view will provide a separate set of metrics for each quota group configured for this campaign. For detailed descriptions of these metrics, see section [List of Quota Metrics](#).

The bottom row of the quota metrics view displays the cumulative values for all quota groups.



Quota metrics view

Unlike the other real-time metric views, the quota metrics view needs to be updated manually to get the current values of all metrics.

To update the view with current metric values:

Click the **Refresh** button.

[< Previous](#) | [Next >](#)

List of Quota Metrics

This section provides detailed descriptions of the real-time metrics that apply to quota groups that are configured within a campaign and are displayed via the [Quota Metrics View](#). Metrics are arranged in alphabetical order.

Note the following considerations regarding the quota metrics:

- The term *records* in the metric definitions shall be interpreted as *records of the list associated with the given campaign and currently enabled within this campaign*. Note that a quota-based campaign can have only one list enabled within it at a time.
- Metrics have different meanings depending on the quota type: field-based, disposition-based, or list-wide. For the differences between these quota types, see the description of the *Quota* metric. For more information about campaign quotas, see the *Contact Center Administration Guide*, section [Lists Tab](#).

Metric Descriptions

Completed

- For field-based quota groups, the *Completed* metric provides the number of records matching the group selection criteria that have been completed (i.e., the records for which any final disposition have been set).
- For disposition-based quota groups or a list-wide quota, *Completed* provides the total number of records in the list that have been completed (i.e., the records for which any final disposition have been set).

Quota

- For field-based quota groups, the configured *Quota* provides the number of records matching the group selection criteria that must be completed with any disposition of "success" type.
- For disposition-based quota groups, the configured *Quota* provides the number of records in the list that must be completed with the disposition specified for this group.
- For a list-wide quota, the configured *Quota* provides the number of records in the list that must be completed with any disposition of the "success" type.

Note that any changes in configured quota values will be reflected here only after the campaign is started.

Remaining

- For field-based quota groups, *Remaining* provides the number of records matching the group selection criteria whose processing within this campaign has not finished.
- For disposition-based quota groups or a list-wide quota, *Remaining* provides the total number of records in the list whose processing within this campaign has not finished.

Successes

- For field-based quota groups, *Successes* provides the number of records matching the group selection criteria that have been completed with any disposition of "success" type.
- For disposition-based quota groups, *Successes* provides the number of records in the list that have been completed with the disposition specified for this group.
- For a list-wide quota, *nSuccesses* provides the number of records in the list that have been completed with any disposition of the "success" type.

Total Records

- For field-based quota groups, this metric provides the total number of records in the list matching the group selection criteria.
- For disposition-based quota groups or a list wide quota, this metric provides the total number of records in the entire list.

[< Previous](#) | [Next >](#)

Campaign Start and Stop

Campaigns can be started and stopped either automatically based on a predefined schedule, or manually. For information about automatic campaign start/stop, see the description of the [outbound campaign settings](#) in the *Contact Center Administrator Guide*.

The current statuses of your campaigns are displayed in column *Running* of the general campaign metrics view. For a campaign selected in this view, the status is also indicated by the name of the toggle button below the metrics table. The button will be named *Start* for an idle campaign, or *Stop* for a running one.

To start a campaign manually:

1. Select this campaign in the general metrics view.
2. Make sure it is currently idle, and click the **Start** button.

The selected campaign will start immediately, provided that there are agents available to handle calls of this campaign. Note that the actual call attempts to phones of specific types are made according to the schedules specified in the [campaign calling hours](#).

To stop a running campaign manually:

1. Select this campaign in the general metrics view.
2. Make sure it is currently running, and click the **Stop** button.

The system will stop making new call attempts for any records of this campaign immediately. All call attempts that may have been in progress will be finished normally.

Note that the use of the manual campaign start/stop controls does not cancel automatic start/stop configuration. For example, consider a campaign configured to start automatically at 2 pm and stop at 6 pm. If this campaign was started manually at 1:30 pm, it will still be stopped automatically at 6 pm unless it is stopped manually before.

Lists View

Real-time metrics for specific lists within a selected campaign are displayed in the lower section of your Agent Desktop in a table called *Lists*. To view these metrics, first select the desired campaign in the [General Campaign Metrics View](#). The *Lists* table will show all lists associated with the selected campaign in alphabetical order.



Campaign Lists View

Like the [General Campaign Metrics view](#), Lists view also has a section where you can define a set of custom metrics for each list-campaign association individually. To define a custom view for a particular list, first select this list in the general list metrics view.

Metrics available in the Lists View are a subset of the campaign metrics focused on records (as opposed to call attempts), except that they only apply to records of an individual list within the selected campaign. For descriptions of these metrics, see section [List of List Metrics](#).

The following data is specific to the campaign list view:

- Parameter *Enabled* is an indication of whether the given list is currently enabled or disabled within the selected campaign. For more information, see section [Enabling and Disabling Lists within a Campaign](#).
- Parameter *Order* means the order in which this list will be used within the given campaign relative to the other lists assigned to the same campaign. This is a static property defined in the [campaign configuration](#). Records from lists with the same order will be dialed in a round-robin fashion.
- For lists with the same *Order* (see above), parameter *Ratio* defines the ratio at which records from these lists will be attempted. For example, if you have two lists with order 1, the first list has a ratio set to 2 and the second list has a ratio set to 3. Two records from the first list will be attempted, then three records from the second list will be attempted, then two records from the first list will be attempted, and so forth. This is a static property defined in the [campaign configuration](#).
- The bar chart shows campaign list progress and efficiency expressed as attempts per completion. The

horizontal axis shows passes through the campaign list records. A pass is a part of the campaign during which all campaign list records are attempted once. For each pass, the vertical axis shows the percent of records that were completed by agents, auto-completed (due to a DNC match or reaching maximum attempts), rescheduled, and remaining (not attempted on the given pass).

[< Previous](#) | [Next >](#)

List of List Metrics

This section provides detailed descriptions of the real-time metrics that apply to individual calling lists within campaigns and that can be displayed via [Lists View](#). Metrics are arranged in alphabetical order.

The term *records* in the following descriptions shall be interpreted as *records of the given list within the given campaign*. Note that if any filters were applied to this list when it was associated with the given campaign, the filtered-out records are excluded from any of the following metrics.

Metric Descriptions

Completed

The *Completed* metric provides the number of records that have been completed (i.e., the records for which final dispositions have been set).

Dialable

Dialable provides the number of records that can be dialed at this moment. Compare this metric to the *Total Remaining* metric that counts all records whose processing within this campaign has not finished. A difference between the two normally indicates that, even though you still have records to process, some of those records have been rescheduled for a future time and, therefore, you may have substantially fewer records that can be actually dialed at the moment. This metric excludes personally assigned records.

Expired

Expired provides the number of records whose processing was finished because the time period during which those records could be called has expired. A record may be set to expire if, for example, the customer agreed to be contacted (opted in) for a limited period of time or to avoid any chance of calling numbers that may have been added to a national or regional/state do-not-call (DNC) list after they were imported into the system for dialing.

P. A. Completed

P. A. Completed returns the number of personally assigned records completed since the beginning of the campaign. This metric is meaningful for preview campaigns only.

P. A. Remaining

P. A. Remaining returns the number of personally assigned records whose processing within this campaign has not finished. This metric is meaningful for preview campaigns only.

Total Completed

This metric provides the total number of records, including personally assigned records, completed since the beginning of the campaign.

Total Completed %

This metric provides the percentage of *Total Completed* records relative to *Total Records*.

Total DNC

Total DNC provides the total number of records excluded from dialing since the beginning of the campaign because they matched records in the associated Do Not Call (DNC) lists. This metric includes personally assigned records.

Total Records

This metric provides the total number of records in the list, including personally assigned records.

Total Remaining

Total Remaining provides the total number of records, personally assigned records, whose processing within this campaign has not finished.

[< Previous](#) | [Next >](#)

Enabling and Disabling Lists within a Campaign

By default, all lists associated with a campaign are considered disabled (i.e., they have to be activated within the given campaign before any records from those lists will be dialed).

The current statuses of lists are displayed in column *Enabled* of the general campaign metrics view. For a list selected in this view, the status is also indicated by the name of the toggle button below the metrics table. The button is named either *Enable* for an inactive list or *Disable* for an active list.

To enable an inactive list:

1. Select this list in the List Metrics view.
2. Click the **Enable** button.

The order in which the system will start dialing records from this list relative to other active lists will be defined by the *Order* and *Ratio* settings.

To disable an active list:

1. Select this list in the List Metrics view.
2. Click the **Disable** button.

The system will stop making new call attempts for any records of this list immediately. All call attempts that may have been in progress will be finished normally.

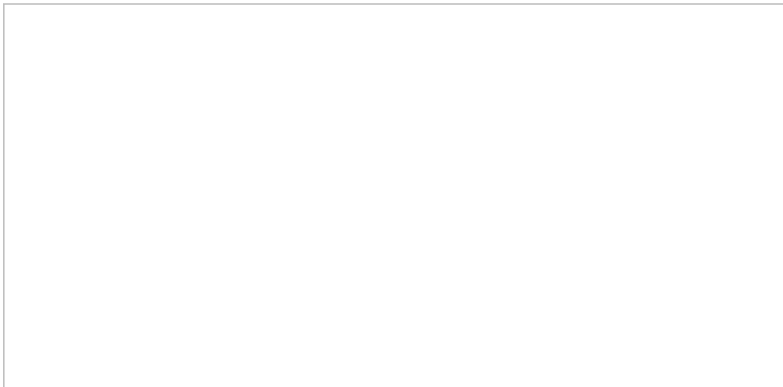
Note that lists can also be enabled and disabled via the [list-campaign association page](#) of the Contact Center Administrator application.

Campaign Teams View

Real-time metrics for specific agent teams assigned to a selected campaign are displayed in the lower right section called *Teams* of your Agent Desktop. To view these metrics, first select the desired campaign in the general metrics view. The *Teams* table will show, in alphabetical order, all agent teams assigned to the selected campaign.

Like the [General Campaign Metrics view](#), the Campaign Team view also has a section where you can define a custom metrics view for each list-campaign association individually. To define a custom view for a particular list, first select this list in the general metrics view.

Metrics available in the Campaign Team View are a subset of the service metrics focused on agent participation. For descriptions of these metrics, see section [List of Service Metrics](#).



Campaign Teams view

Note the following considerations regarding the campaign team metrics:

- The term *agents* in the metric definitions shall be interpreted as *agents of this team qualified to participate in the selected campaign* (i.e., those who have the corresponding campaign skill with any level higher than zero). Note that not all agents assigned to the team may have such a skill.
- The term *outbound calls* in the metric definitions shall be interpreted as *any outbound calls handled by the agents of this team qualified to participate in this campaign* (see above). Note that if the agents participate in a number of campaigns or make manual outbound calls related to inbound services, all such calls will be counted as outbound calls in these metrics.

Adding and Removing Campaign Teams

Initially, teams are assigned to a campaign during the [campaign configuration process](#). For more information, see the *Contact Center Administrator Guide*, section [Assignments Tab](#).

As a campaign operator, you can assign additional teams to active campaigns and remove previously assigned teams.

To assign a new team to a selected campaign:

1. Click the green “+” button at the bottom of the campaign teams view.
2. Select the desired team from the list that appears. The team will appear in the campaign teams view. All agents of the team will have the campaign skill assigned to them automatically with the highest level. You can change this skill assignment manually.

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

To remove a previously assigned team:

1. Select this team in the campaign teams view.
2. Click the red “x” button. The selected team will be removed from the campaign and will no longer appear in the campaign teams view.

Note: When teams are assigned to multiple enabled campaigns, the cumulative load of such campaigns must be distributed evenly among those teams. For more information and examples of valid and invalid team assignments, see the *Contact Center Administrator Guide*, section [Assignments Tab](#).

[< Previous](#) | [Next >](#)

General Information About Email Queue Management

In addition to calls and chats, the agents of your team may be assigned to process customer requests made via email. In such a case, as the supervisor, you will be able to [assign emails to your agents](#) manually, from the team queue and your *My Queue*. You will also be able to [view and manage personal email queues](#) (i.e., *My Queues*) of all your agents.

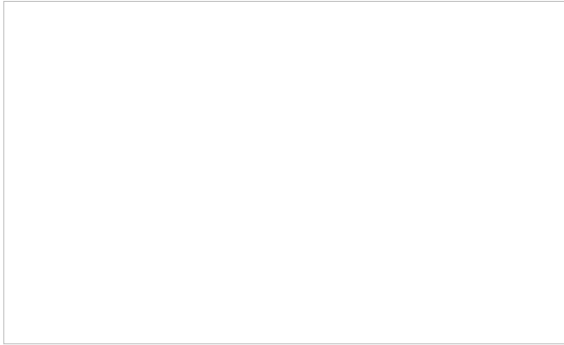
For general email handling functions available to agents of your team, see the topics of the [Handling Email](#) section of the *Bright Pattern Contact Center Agent Guide*.

[< Previous](#) | [Next >](#)

Assigning Email to an Agent

Depending on your contact center practices, customer emails can be either delivered directly to agents (via the *Push* method) or shown in the team queue from which agents will be normally expected to retrieve them manually (via the *Pull* method). When emails appear in the team queue, as a supervisor, you can also assign them manually to the members of your team. You can also reassign emails to other members of your team from your personal email queue (i.e., your *My Queue*). Note that in previous versions of Bright Pattern Contact Center, *My Queue* was called *Personal Queue*.

If your team is assigned to handle emails, you will see entry *Email* in your *Active Communications List*. The entry will show how many emails you currently have in your *My Queue* and in the team queue.



Email queue entry in ACL

Managing Queues

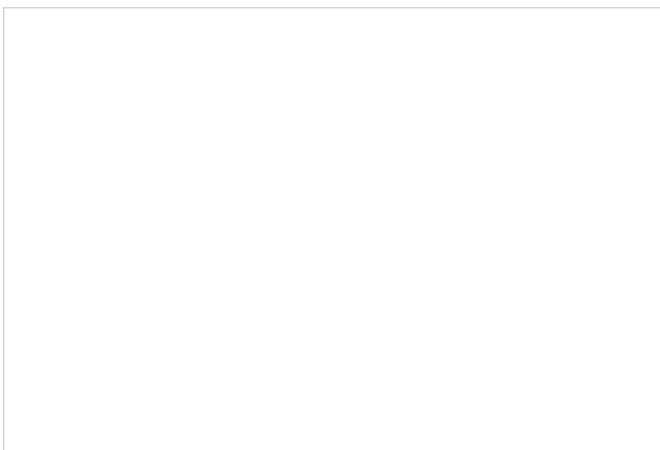
To manage your own *My Queue* and/or your team queue, select the **Email** entry. Your personal and team queues will be displayed in the *Contact Info Panel* area. You may have to drag the sizing panels up or down to view both queues at the same time.

For each queued email, the customer's name and the subject line will be shown. A bar indicator next to each email will indicate how close the current wait time is to breaching the SLA. (The SLA is your contact center standard time for replying to customers' emails). The unshaded portion of the indicator represents the time remaining to the SLA breach. This time also defines the default order in which emails appear in the queue.

If your team is assigned to handling emails for multiple services, you can adjust your team queue to display emails for any one of those services or for all assigned services at once. The name of the currently selected service will be displayed under the queue title.

To view another service, click on the currently selected service name and select the desired service from the drop-down menu.

To view queued emails for all assigned services, click **All**. You can sort emails in the team queue by SLA, arrival date, and subject, and choose either ascending or descending order of email appearance in each case.

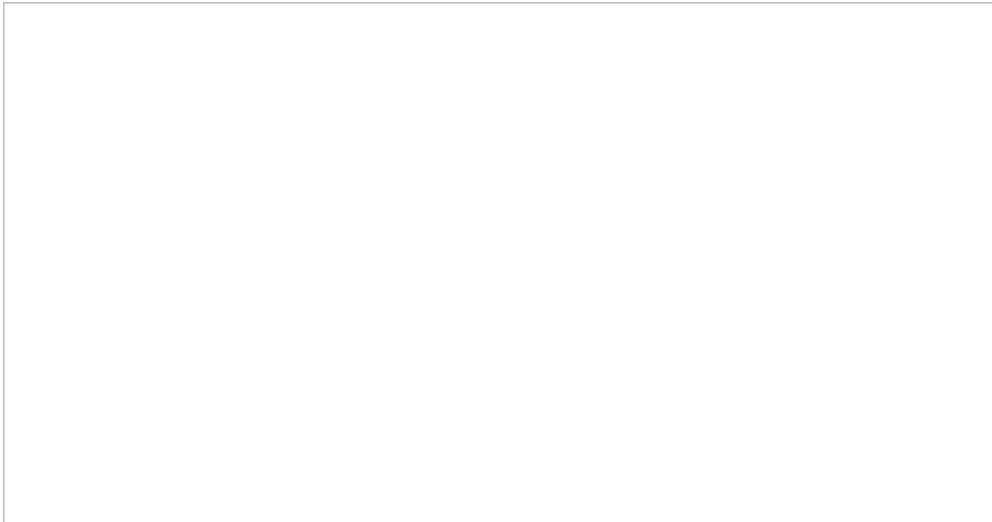


Team queue with SLA indicators, service filter, and sorting controls

Reviewing and Assigning Emails

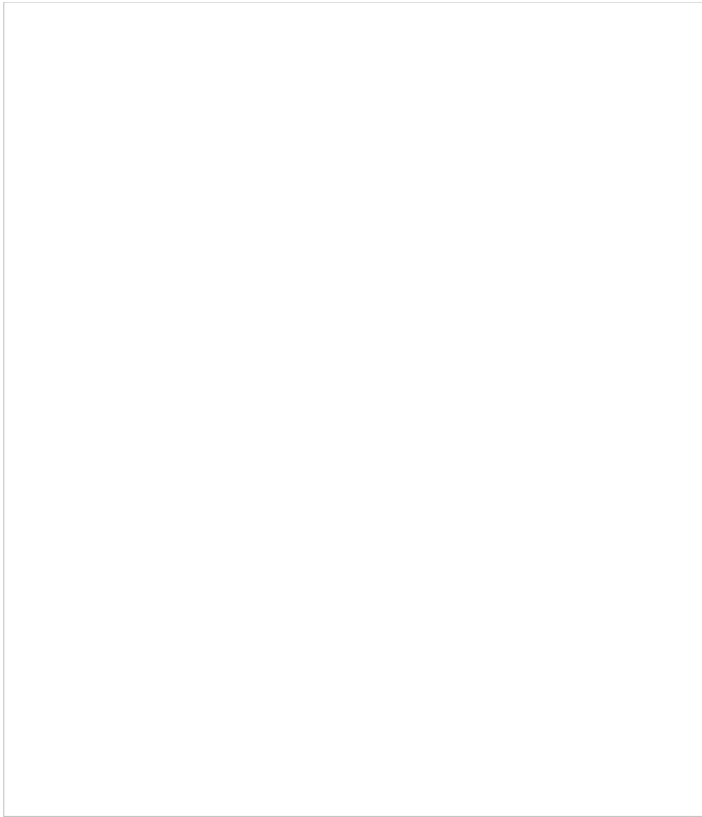
To review the contents of an email, click it once. The email will appear in the reading pane. For more information about reviewing email content, including case history, attachments, and supplemental web pages and forms, see the *Agent Guide*, section [How to Review an Incoming Email](#).

To assign the selected email to a member of your team, click the **Assign...** button in the reading pane.



Assign button

In the dialog window that appears, open your team folder, and select the desired agent. Alternatively, you can enter agent's name in the *search* field. Click **OK** to confirm the assignment.



Email assignment

The email will be moved to the agent's *My Queue*. Note that the position of this email in the agent's queue will be determined by the remaining time to SLA breach (see above) relative to the other emails that the agent may have in the queue. If you wish to get agent's immediate attention to the assigned email, consider sending the agent an internal chat message. For more information, see section [Individual Chat](#).

If you wish to process the selected email yourself, click the **Grab** button in the reading pane. The email will be moved to your *My Queue*.

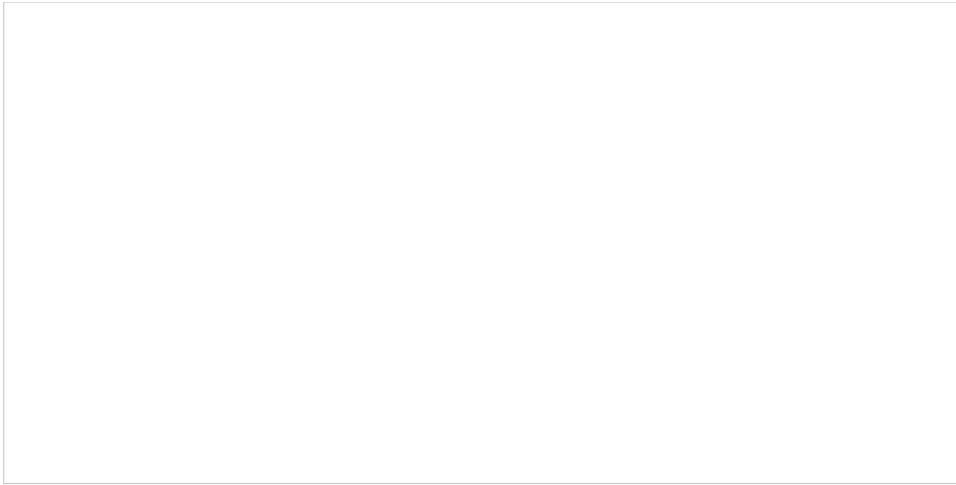
[< Previous](#) | [Next >](#)

Managing My Queues (Personal Email Queues)

As a supervisor, you can view and manage personal email queues (i.e., the *My Queues*) of all agents of your team. You can view the emails in the agent's queue, assign those emails to other agents, and/or transfer them to other services.

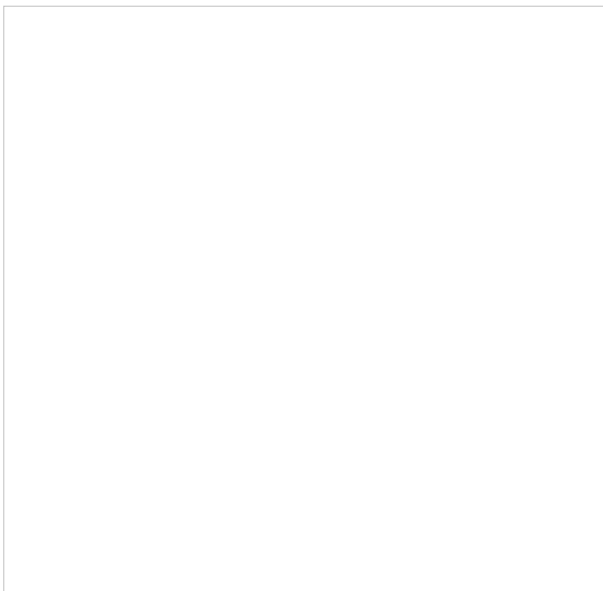
To manage an agent's *My Queue*, first you need to select the agent from the *Agent Metrics View*. Note that some metrics in this view can be helpful in deciding whether any of your agents need help with cleaning up their queues. In particular, the *IN Desktop* metric shows you how many emails agents currently have in their *My Queues*, while the *IN Breached SLA* metric shows you how many of those emails have exceeded the predefined service level threshold. For descriptions of all available metrics, see section [List of Agent Metrics](#).

When you select an agent, the *Contact Info Panel* will show various controls for active management of this agent. To manage an agent's *My Queue*, click the **Show Agent's Personal Queue** button ☐.



Show Agent's Personal Queue button

The *My Queue* of the selected agent will be displayed in the *Contact Info Panel* area. You can reassign any of those emails to other agents, send them back to the team queue, or assign them to a different service. You can move multiple emails to the same location in one step.

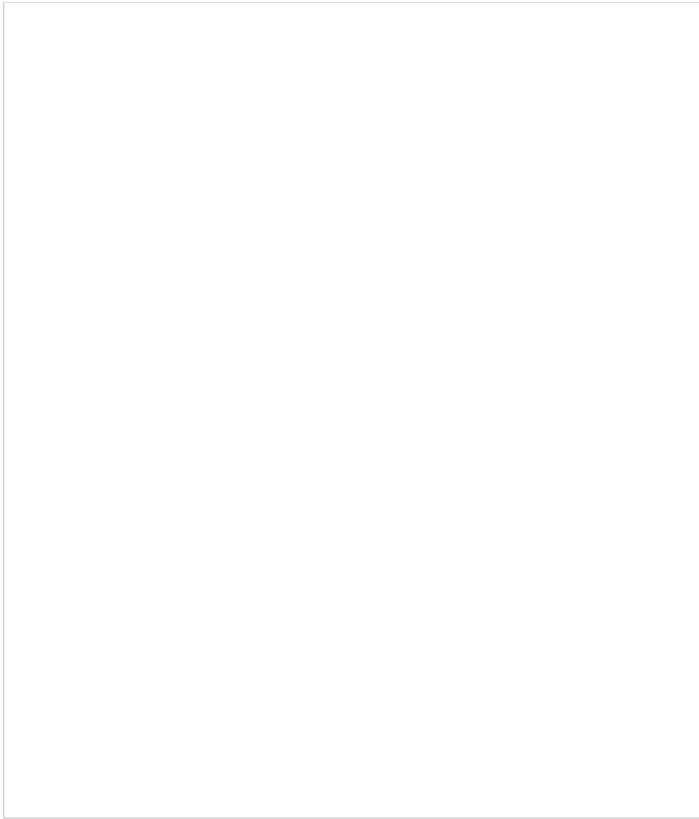


Viewing agent's My Queue

If necessary, you can review content of any email in an agent's *My Queue* by clicking it once. The content will be displayed in the reading pane. For more information about reviewing email content, including case history, attachments, and supplemental web pages and forms, see the the *Agent Guide*, section [How to Review an Incoming Email](#).

Note that if the agent has previously worked on the email reply and has saved it as a draft, you can also review the draft reply; it will be displayed in the editor pane.

Use the checkboxes to select the emails that you wish to move to another location. Then click the **Assign...** button.



Email assignment dialog with Team Queue entry

In the dialog window that appears, follow these steps as needed:

- To assign the selected emails to another agent, open your team folder, and select the desired agent.
- To move the selected emails back to the team queue, select the *Team Queue* entry (the only entry marked with the envelope icon ).
- To transfer the selected emails to a different service, open the email service folder and select the desired new service. Note that there may be more than one email service folder and their names are specific to your contact center. If necessary, contact your service administrator for more information.

Remember that you can use the *search* field to look for the desired destination.

Click **OK** to confirm the assignment.

[< Previous](#)