

5.2 How to Review a Calling Record

Bright Pattern Documentation

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How to Interpret Your Current State Information

The agent state is the indication of your current availability to handle service calls. This information is used by the system to decide whether a new service call can be delivered to you. The information about the time you spend in each state also appears in reports about your performance.

The Agent Desktop application uses icons to represent agent states. Your current state is shown in the upper left-hand corner of Agent Desktop. These icons, the states they represent, and descriptions of those states are described as follows.

Note: Information in the main text of this section is valid if your system is configured to let you handle one customer interaction at a time. This configuration is most typical when you handle calls only. If you process interactions of other types (e.g., chats or emails), then, depending on your contact center practices, you may be expected to handle multiple interactions simultaneously. The differences in interpretation of your states in this case are briefly explained in the notes following a state description. For a more detailed explanation, see sections [Handling Multiple Chat Sessions](#) and [General Information About Handling Email](#).

Agent States

Ready



You are available to take a service call. In most cases, you make yourself *Ready* manually. See [How to Make Yourself Ready](#) for more information.

Depending on your contact center practices, the *Ready* state may also be applied automatically under some of the following conditions:

- Upon login
- As soon as you finish a previous service call
- When the time allocated for after-call work associated with the previous call expires
- When the rest time associated with the previous call expires

You may also be forced into the *Ready* state by your supervisor.

Note: If you are expected to handle multiple interactions simultaneously, the *Ready* state will only be applied when you do not have any active interactions on your desktop. However, in this case you may receive new interactions in states other than *Ready*.

Ringling



You are unavailable to take service calls because one service call is already being delivered to you. The ringing icon is briefly displayed while your phone is ringing.

Busy



You are unavailable to take new service calls because you are already handling a service call. This state is displayed from the moment the call is connected and until it is released. For outbound calls, it also includes the call dialing phase. When your service call is released, depending on your contact center practices and the services that you provide, you will be switched automatically to either the *After Call Work* state, the *Not Ready* state, or the *Ready* state.

Note: Even if you are expected to handle multiple interactions simultaneously, your state will be displayed as *Busy* as long as you have at least one active interaction of any media type. However, your actual availability will depend on the number of interactions you are currently handling versus the maximum number of interactions you are expected to be able to handle simultaneously. Therefore, you may receive new interactions when you are in the *Busy* state.

After Call Work



You are unavailable to take new service calls because you are processing information related to the call that you previously handled. This state may or may not be used depending on your contact center practices and the services that you provide. If it is used, you will be switched to this state automatically as soon as the call is released by either the customer or yourself. You will remain in this state until you manually make yourself *Ready* or *Not Ready* to take another call. Note that your *After Call Work* state may also end automatically if the time allocated for the after-call work exceeds the limit set by your administrator.

Note: If you are expected to handle multiple interactions simultaneously, you may receive new interactions when you are in the *After Call Work* state. You will be switched to this state only when the last live interaction on your desktop is finished. (Otherwise, you will continue to be in the *Busy* state.)

Not Ready



You are unavailable to take service calls because you are temporarily away from your desktop or busy doing some work that is not directly related to handling of service calls. Under normal circumstances, you make yourself *Not Ready* manually. Your system may also be configured to let you indicate a specific reason for being *Not Ready*. For more information, see [How to Make Yourself Not Ready](#) and the following *Not Ready* agent states: *Lunch*, *Away From Desk*, and *Break*. These reasons are specific to your contact center. You will get detailed instructions about the meaning and usage of such reasons from your administrator.

Depending on your contact center practices, the *Not Ready* state may also be applied automatically under some of the following conditions:

- Upon login
- As a short rest time after finishing processing of a service call
- Upon rejection of a service call
- If you do not answer a ringing service call within a reasonable time
- When your Agent Desktop loses connection to the system

You may also be forced into the *Not Ready* state by your supervisor.

Note: You will not receive any interactions while you are in this state regardless of how many interactions you are expected to handle simultaneously.

Lunch



You are unavailable to take service calls because you are on your lunch break. Under normal circumstances, you manually set the agent state to *Lunch* or some other Not Ready reason. See [How to Make Yourself Not Ready](#) for more information. These reasons are specific to your contact center. You will get detailed instructions about the meaning and usage of such reasons from your administrator.

Away From Desk



You are unavailable to take service calls because you are temporarily away from your desktop. Under normal circumstances, you manually set the agent state to *Away From Desk* or some other Not Ready reason. See [How to Make Yourself Not Ready](#) for more information. These reasons are specific to your contact center. You will get detailed instructions about the meaning and usage of such reasons from your administrator.

Break



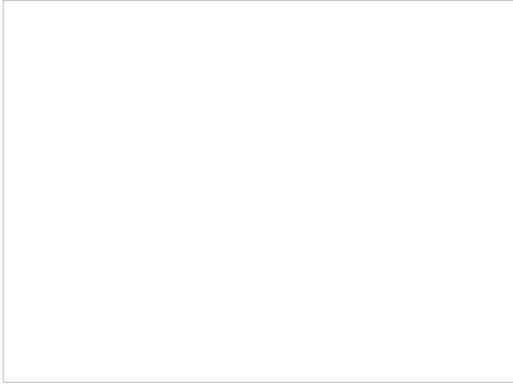
You are unavailable to take service calls because you are taking a break. Under normal circumstances, you manually set the agent state to *Break* or some other Not Ready reason. See [How to Make Yourself Not Ready](#) for more information. These reasons are specific to your contact center. You will get detailed instructions about the meaning and usage of such reasons from your administrator.

How to Make Yourself Not Ready

During your working session, you may need to make yourself temporarily unavailable to handle interactions (e.g., to take a scheduled break, to have a meal, or to attend a meeting). You may be required to indicate a specific reason for becoming unavailable every time you make yourself *Not Ready*. You can make yourself *Not Ready* if your current state is either [Ready](#) or [After Call Work](#). You can also change reasons for being *Not Ready*.

First, specify why you are *Not Ready*.

- Click **User Status Indicator/Selector**.
- From the drop-down menu, select **Not Ready** or any specific reason for becoming not ready, such as *Break* or *Lunch*. The exact set of reasons is specific to your contact center.
- You can also press **F8**, select the desired *Not Ready* state with the cursor keys, and press **Enter**.



Making yourself Not Ready

Your state changes to *Not Ready*. You will not receive any service calls while you are in this state. You will have to make yourself *Ready* manually when you are ready to take service calls again. See [How to Make Yourself Ready](#) for more information.

Note that you can request *Not Ready* to be your next state while you are in the *Busy* state (i.e., while actively handling an interaction). Your current state will not change, but the system will note your desired next state and will switch you to this state after you finish processing the current interaction. The requested *Not Ready* state will be displayed as *Next* under the current state display.

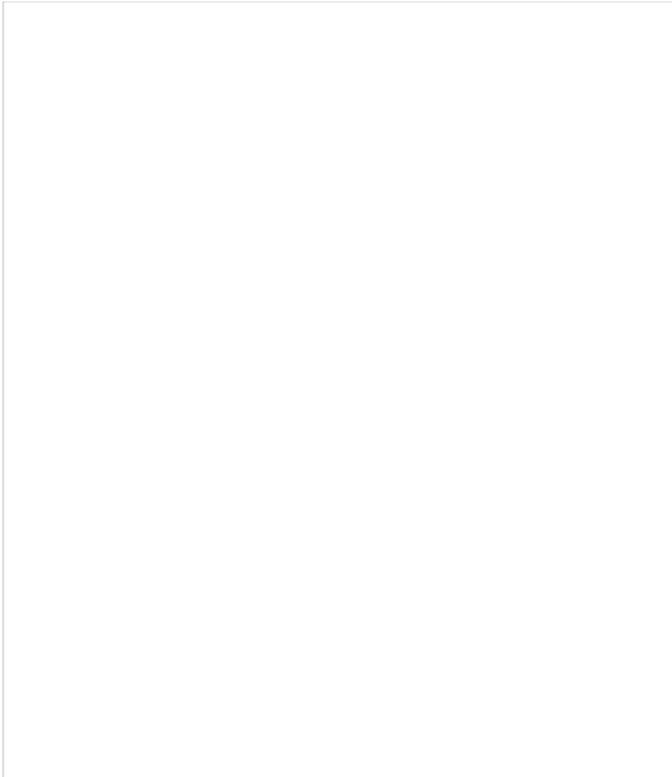
Note: If you have two or more active interactions on your desktop, you will only be switched to the requested *Not Ready* state after you finish processing all those interactions. However, you will stop receiving new interactions as soon as you request *Not Ready*.

Dispositions and Notes

Dispositions are custom interaction results defined by your contact center management. When handling a service interaction, you may be required to select one of the [dispositions](#) that define the outcome of the interaction. If dispositions are defined for the services that you provide, the [Contact Info Panel](#) of your Agent Desktop will display the *Disposition Selector* for every associated service interaction.

If you are required to set dispositions, you will receive detailed instructions for their use from your system administrator. Learn more about [dispositions](#) and how they are managed in the *Contact Center Administrator Guide*.

In addition to dispositions, you can also enter free-form text notes to provide more information about the outcome of the interaction.

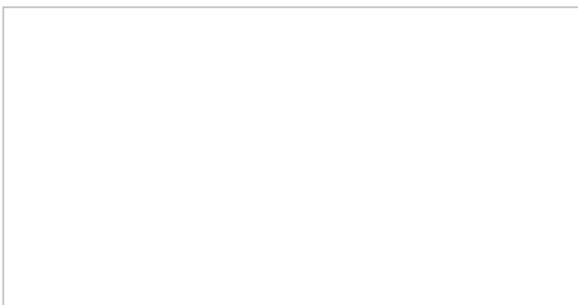


Disposition selector

How to Enter Dispositions and Notes

To enter a disposition for an interaction and/or related notes, follow these steps:

1. At any time during the interaction with the customer or while in the [After Call Work](#) state, click the *Disposition selector*.
2. From the drop-down menu, select the disposition that corresponds to the result of the interaction. Some dispositions specific to outbound campaigns may require additional parameters, such as scheduling of another call attempt. If such parameters are required, they will be displayed in the *Contact Info Panel*.
3. If necessary, enter free-form notes in the text field.
4. Continue to process the interaction normally. For more information about finishing interactions, see [How to Release a Call](#) and [How to Wrap Up After-call Work](#).



Selected disposition and free-form notes

Note: If you use a custom form in the *Context Information Area* for processing data related to a specific call, both the *Disposition Selector* and the *Notes* field may appear in that form instead of the *Contact Info Panel*.

Other Uses for Dispositions

If configured for your contact center, a disposition can be used to trigger a *workflow*, an automated series of events that are initiated when an interaction is completed.

Workflows automate what happens after the conversation is done and will handle any necessary follow-ups, depending on the interaction's disposition type. Such follow-up actions include setting context variables, sending an email, sending a text message, scheduling an event, clearing a scheduled event, and making a request. Workflows help to reduce your workload by following up with customers and gathering data in a consistent way.

For example, setting a particular disposition for an interaction could trigger the following series of events to happen:

1. Send a survey to the customer
2. Wait a specified amount of time (e.g., 30 minutes, 1 day, 1 week, etc.)
3. Send a follow-up email to the customer.

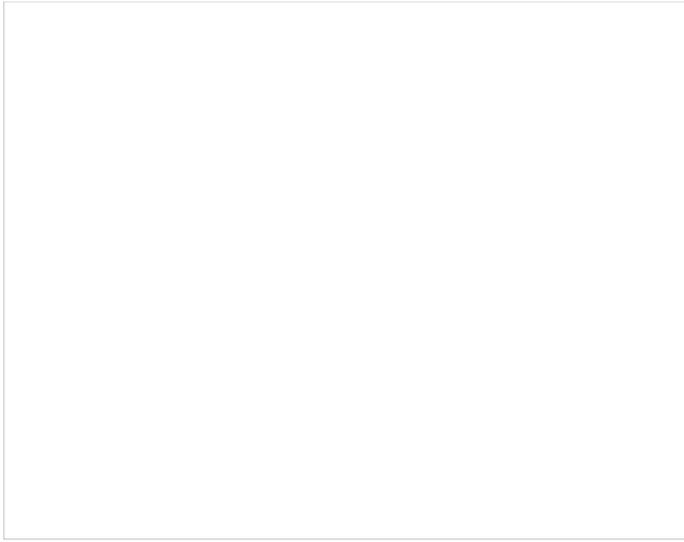
Using Dispositions to Request That Content Be Erased

Starting with Bright Pattern Contact Center version 5.2, you can use a disposition to request that content from a specific interaction be erased. This capability was added to meet PCI DSS 3.2 and GDPR requirements, which specify that sensitive data (e.g., credit card information) may not be stored in your contact center, even if it is encrypted. As such, Bright Pattern allows for the manual deleting of data that is stored in voice recordings, voice recording transcripts, chat transcripts, email messages, screen recordings, and so forth.

You can request that such data be erased, but only your system administrator can erase it.

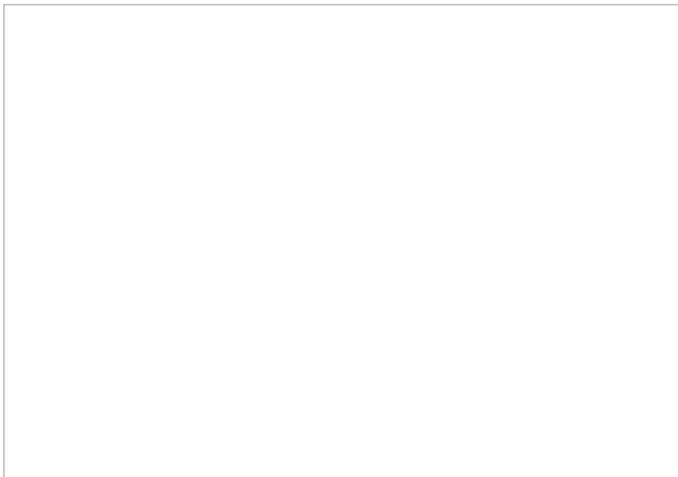
What to Do

1. If such a disposition is enabled for your contact center, you can disposition an interaction with a request to erase content, provided that you give a reason. Note that the name of the disposition is determined by your contact center. If you do not know which disposition to select, contact your supervisor or system administrator.



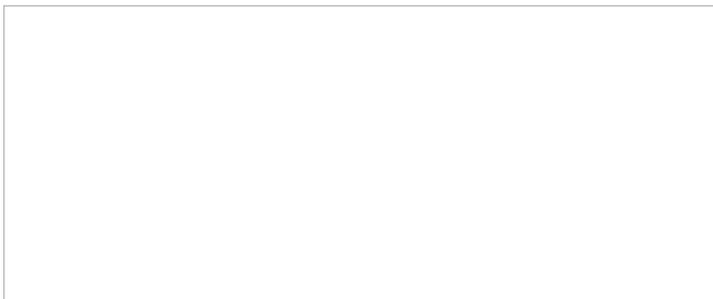
Disposition "Erase content" selected

2. In the *Notes* field, provide the reason for the request and enter additional details about the interaction. Then complete the interaction.



Use Notes to provide a reason for erasing content

3. The disposition will initiate a workflow that sends your system administrator an internal message with the request. The unique identifier tells the administrator which interaction is affected, and he or she can review the interaction and the request.



Example message delivered to the system administrator

