

5.2 Supervisor Guide

Bright Pattern Documentation

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OUT Queue Dropped	33
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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*.

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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.

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Starting Agent Desktop

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

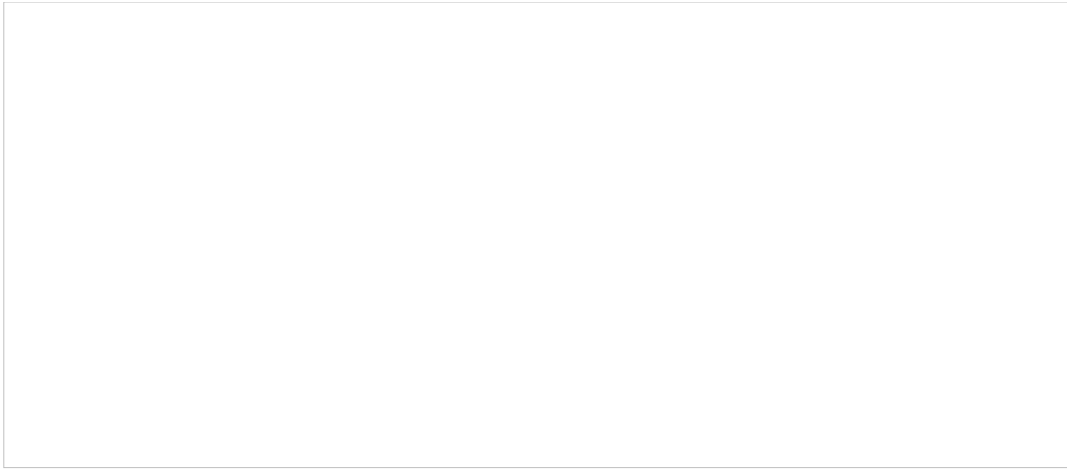
- Google Chrome
- Mozilla Firefox
- Internet Explorer 10 (Microsoft Windows 7 only)
- Internet Explorer 11 and later (Microsoft Windows 7, 8, and 10)
- Safari 8 and later (Mac OS X)

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.

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User Interface Overview

Supervisors logging in to the Agent Desktop application will notice some key differences between Agent Desktop for agents and Agent Desktop for supervisors. In *Supervisor mode*, the Agent Desktop menu provides the Supervision icon, which, when clicked, updates the Context Information Area with real-time metrics views for agents of a selected team and services provided by that team.



Agent Desktop interface in 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 Conversations 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 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](#).

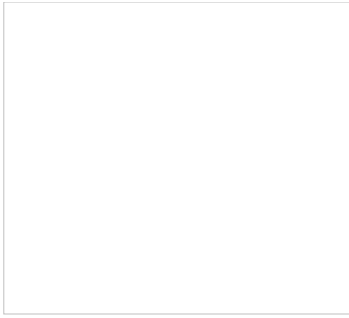
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Working as an Agent

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

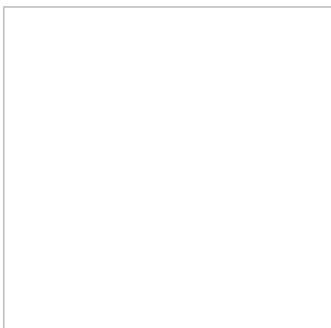
Note: In the Bright Pattern Contact Center system, access to various functions is controlled via role assignment. In order to be able to perform agent functions, you may need an agent role assigned to you by your system administrator, in addition to the supervisor role. If, after logging in, you cannot 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.

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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

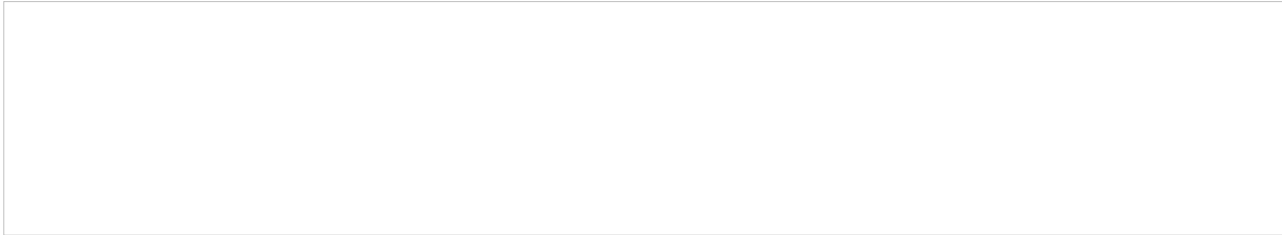
To switch to the *Supervising* state, follow these steps:

1. Click the **User Status Indicator/Selector**.
2. Select **Supervising** from the drop-down menu.

The teams that are assigned to you for supervision can be viewed by clicking on the Supervision  icon in the Agent Desktop menu.

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 located in the Supervision  section of Agent Desktop and displayed at the bottom of the Context Information Area.




A view of all teams' agent metrics is found in the Supervision section

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.

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Wallboard

The *Wallboard* displays statistics and informational widgets about your current performance and/or performance of your team. Clicking the Wallboard  icon will direct you to the Wallboard Builder application in a new browser tab or window. For more information on the application and how it works, please see the [Wallboard User Guide](#).



Viewing a customized wallboard

Customizing the Wallboard

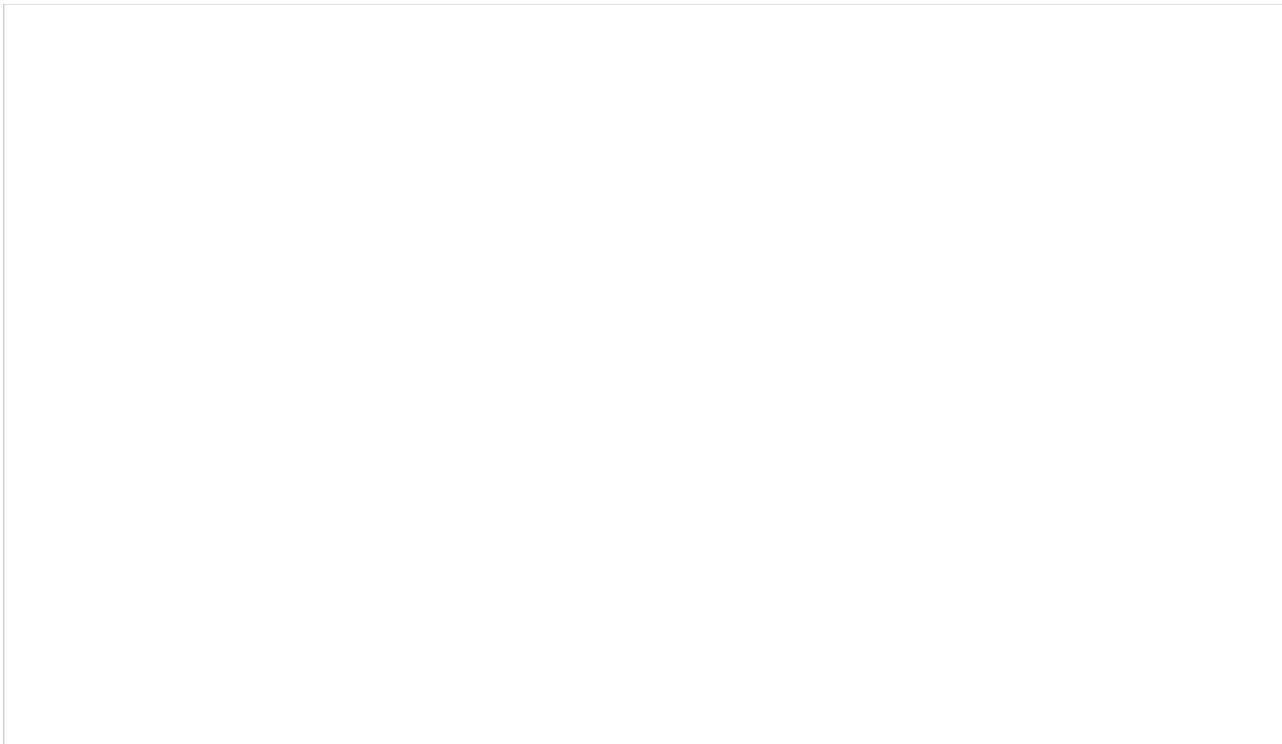
Many elements within the wallboard are customizable. If you have the privilege to edit wallboards, you can customize them from the Wallboard Builder application. For more information on this, please refer to the [Wallboard Builder Reference Guide](#). In order to customize the wallboard, additional privileges may be required and are detailed in the [Contact Center Administrator Guide](#).

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My Grades



My Grades displays widgets containing metrics that allow you to monitor key areas of your and your team's performance. You can change the placement of the widgets and configure some widget metrics. As a supervisor, your view of My Grades is different than your [agents' view](#) as you have more widget options.



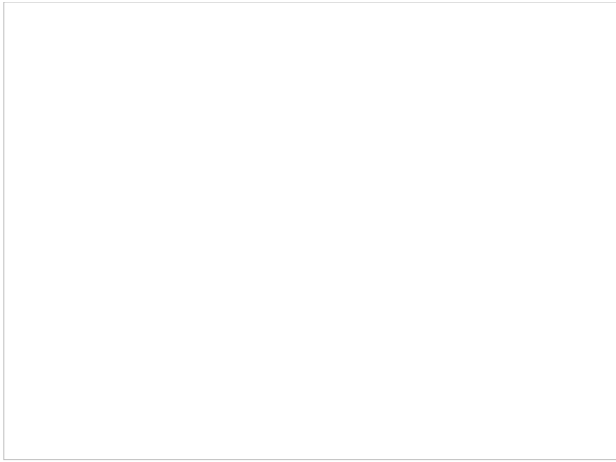
Supervisor view of My Grades

My Grades Widgets

There are nine widget options in total: six standard plus three additional widgets available to those supervisors with campaign operation privileges. There are six slots for these widgets to be displayed in. The following are the widgets available for display, including those for campaign operators:

- [Agenda](#)
- [Agent by State](#)
- [Campaigns Calls in Progress](#) (campaign operator)
- [Customer Satisfaction](#)
- [Dispositions](#) (campaign operator)
- [Lowest Occupancy Agents](#) (campaign operator)
- [Longest Break Time](#)
- [Longest Wait Time](#)
- [Worst Service Level](#)

To change the display in a given widget, click the **down arrow** located in the upper right-hand corner of the widget. This will produce a drop-down menu that allows you to choose any of the widgets for display.



My Grades widgets options

Widget Descriptions

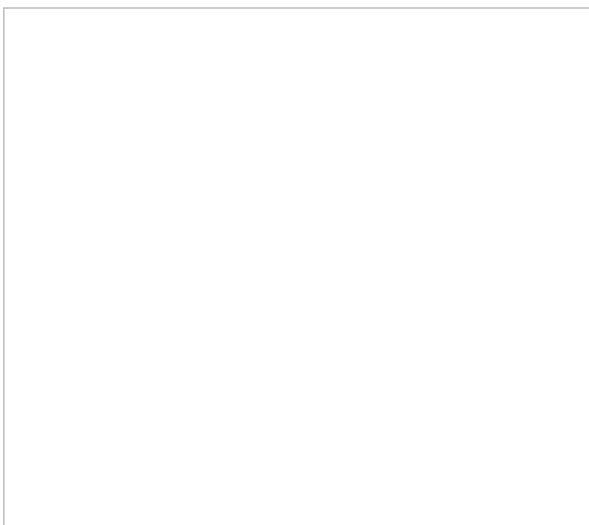
The following is a list of the widgets available in My Grades, including descriptions of what they do and the metrics they contain. Widgets are listed in alphabetical order.

Agenda

The *Agenda* widget displays upcoming agenda items from your [Calendar](#). If there is no agenda, the widget will display text stating so.

The widget shows your schedule for today based on the current time (all items currently in progress and scheduled later than current time). Items in progress or items that are due in less than 10 minutes are shown with red bar on the left side. Items that are due in less than 2 hours are shown with brown bar on the left side. Other items are shown with blue bar on the left side.

If number of scheduled items is too large, then widget shows the top few items and dots (“...”). If you click within the widget, Agent Desktop navigates to the Calendar.



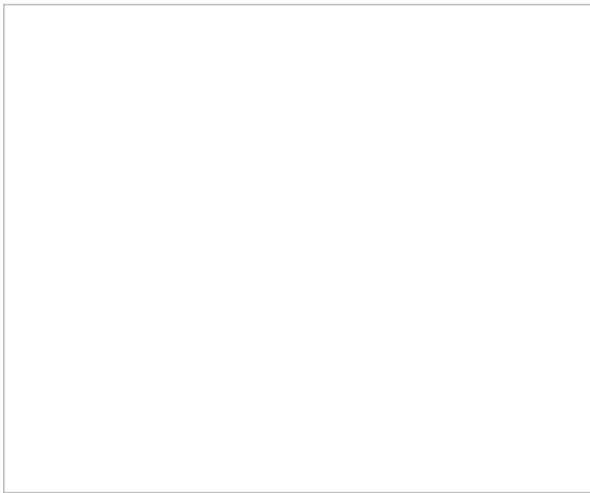
Agenda widget

Agent by State

The *Agent by State* pie chart shows the state of all logged-in agents from your sub-teams. The following states displayed are:

- [ACW \(After Call Work\)](#)
- [Busy](#)
- [NR \(Not Ready\)](#)
- [Ready](#)

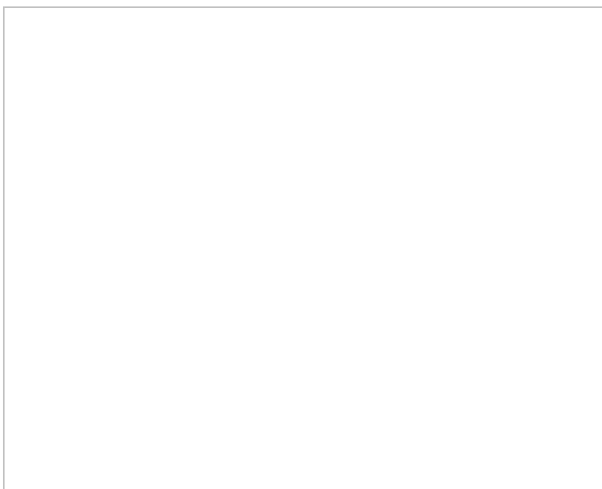
It is possible to filter each of these states out of view by clicking on the state name. To filter a state back in, click on the name again.



Logged-in agents by state

Campaigns Calls in Progress

Campaign Calls in Progress displays the number of calls currently being attempted in all running outbound campaigns.



Campaigns Calls in Progress widget

Customer Satisfaction

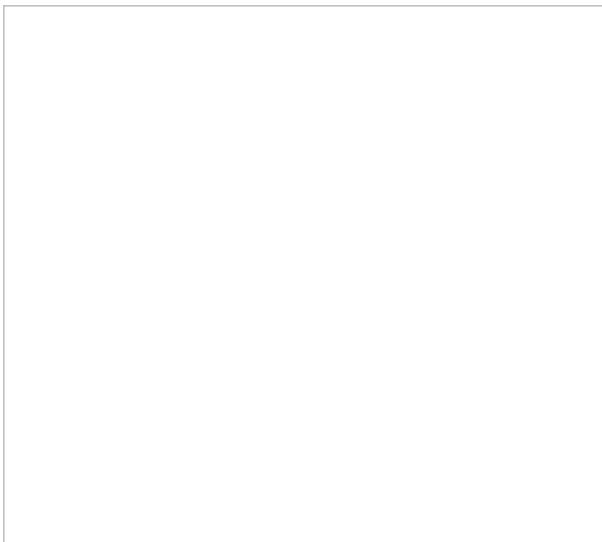
The *Customer Satisfaction* widget displays the results of customer satisfaction surveys per agent; the results are displayed as a percentage (0-100).



Customer Satisfaction widget

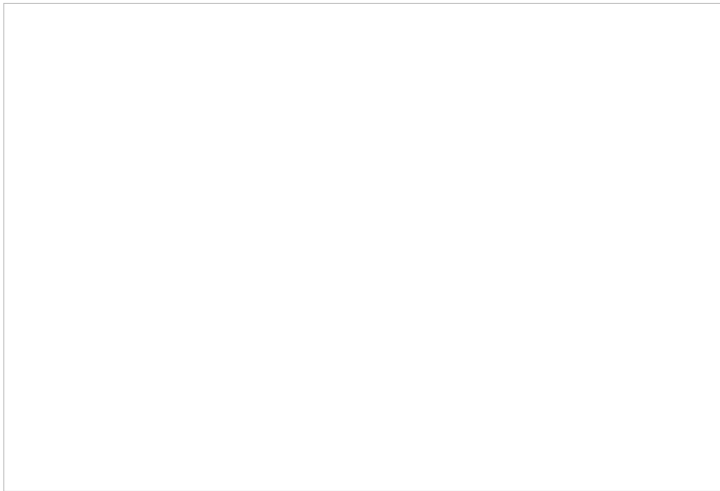
Dispositions

Dispositions displays the [dispositions](#) available for a given campaign; these are configured in the Contact Center Administrator.



Dispositions widget

To add or remove dispositions from the widget, click the **cog icon** in the upper right-hand corner of the metric. From here, you may select from the pop-out menu which dispositions will be displayed.



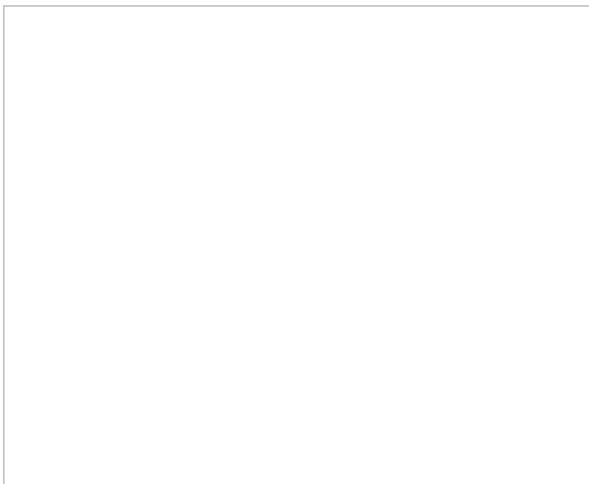
Selecting dispositions

Lowest Occupancy Agents

Lowest Occupancy Agents displays the top 7 agents with the lowest occupancy rates. Occupancy is the average 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).

Longest Break Time

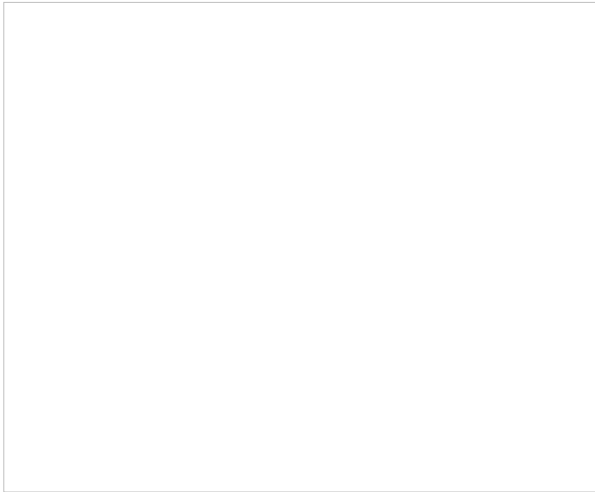
Longest Break Time displays the names of the top 7 agents with the longest [Break](#) time; this metric also includes the time spent in the Not Ready, Lunch, and Away From Desk states.



Longest Break Time widget

Longest Wait Time

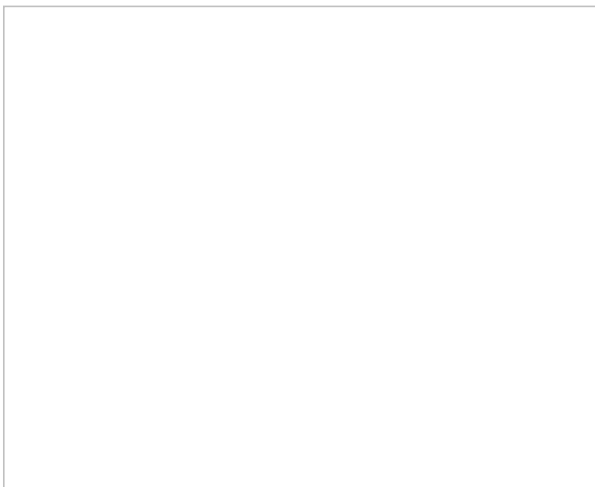
Longest Wait Time shows the longest wait time for a given service; the name of the service will be displayed at the bottom. Default thresholds (in minutes) are 10, 20, 40 and are displayed as the corresponding colors green, yellow, and red.



Longest Wait Time widget

Worst Service Level

The *Worst Service Level* widget, utilizing the metric [IN Svc Level %](#), specifically highlights the service with the lowest percentage of handled interactions. Default threshold percentages are 50, 75, 90, and are displayed as the corresponding colors red, yellow, green.



Worst Service Level widget

Cases

Cases, located in the *Contacts* section of Agent Desktop, are a useful way to keep track of agent interactions, including any related notes from multiple agents and any subsequent follow-up activities. The content of these interactions is available to anyone on your team, allowing collaboration on cases that may take longer to handle than average. By default, cases are emails; however, cases also may be created from chats or calls.

For more information about how to search for and add to cases, please see [Cases](#) in the *Agent Guide*.



Search for cases in Contacts

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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 are found in the Supervision section of Agent Desktop.

The Supervision section 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. 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.



A view of various real-time metrics in the Supervision section

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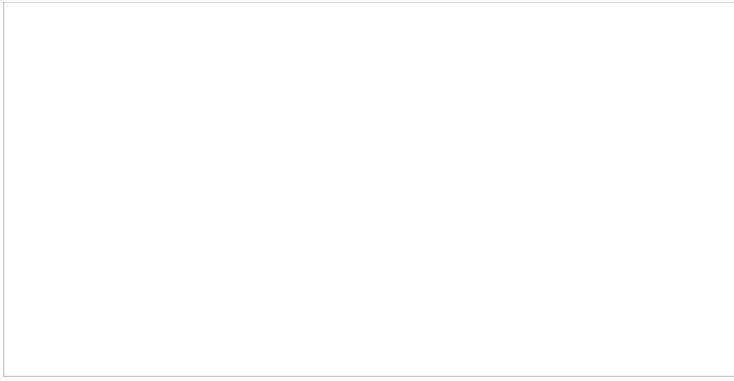
Customization of Metric Views

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:

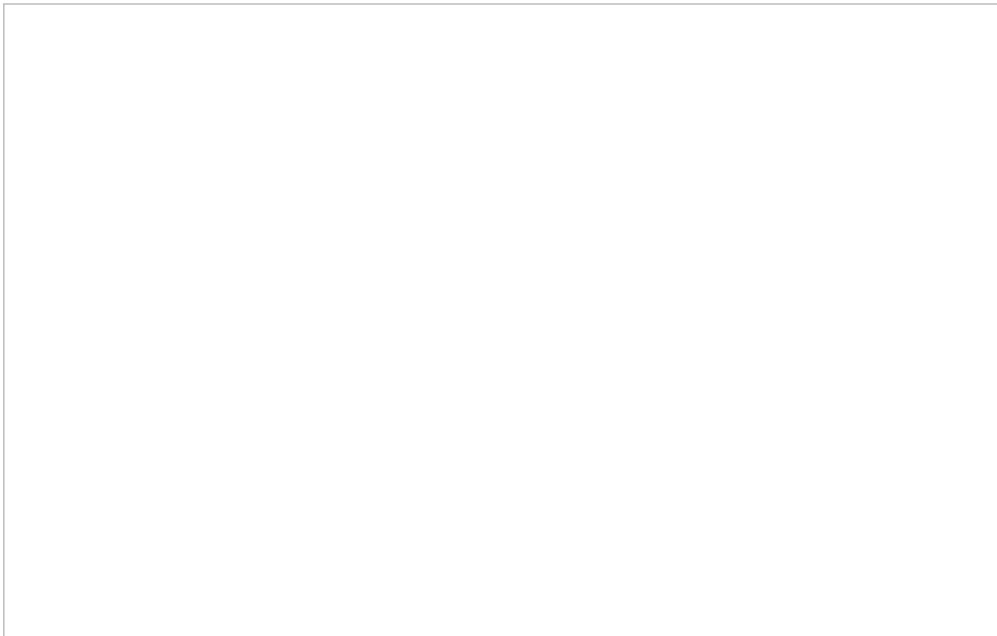
1. Hover your cursor over the corresponding column name and click the drop-down menu icon that will appear.
2. Select the **Hide metric** option.



How to hide metrics

To add a metric:

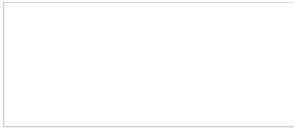
1. Hover your cursor over the name of the column next to where you want to add this new metric, and click the drop-down menu icon that will appear.
2. Select the **Add metrics...** option. A list of available metrics will appear with checkboxes next to their names.
3. Locate the desired metric in the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



Click and drag to
arrange metrics

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](#)
- [Team Metrics](#)

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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 the 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 the 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:

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

Additionally, a list of [All Real-Time Metrics](#) and their definitions is available in the *Reporting Reference Guide*. [Information About Real-Time Metrics](#), also located in the *Reporting Reference Guide*, provides general details about how these metrics function.

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Team Metrics View

Team metrics, while similar to [agent metrics](#), focus specifically on the performance of the team you supervise. Team metrics are found within the Supervision center, at the top of the screen. 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.

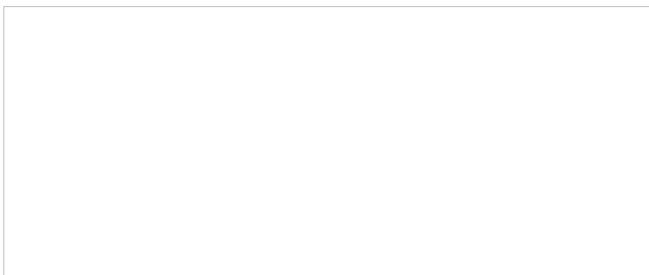
While several of the team metrics are available in other metric view areas, team metrics are the sum or average of all values pulled from individual agents within a given team. For detailed descriptions of the metrics used in this section, see [List of Team Metrics](#).



A view of team metrics, located at the top of the Supervision center

How to Add or Hide Metrics

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 metrics, add metrics, hide all metrics, or restore the default view. If you do not remember the changes you made (i.e., you hid a metric, want to add it back, but you do not remember the name of the metric), you may restore the default view to make all metrics visible that were originally set in Agent Desktop.



Adding or hiding metrics

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

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

To add hidden metrics:

1. Mouse over the name of the metric below which you wish the hidden metric to appear, and click the drop-down menu icon that will appear.

2. Select the **Add metric...** option. A list of metrics will appear with checkboxes next to their names.
3. Locate the desired metric in the list and select its checkbox.
4. Click **OK**.



A view of team metrics from the Supervision center

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List of Team Metrics

This section provides detailed descriptions of the real-time metrics that apply to teams and can be displayed via the [Team Metrics View](#) in the Supervision center or via [Campaign Team View](#) in the Campaign Operations center. For definitions of these metrics, as well as a complete list of real-time metrics, see [List of All Real-Time Metrics](#) in the *Reporting Reference Guide*. Metrics here are arranged in alphabetical order.

[Avg ACW Time](#)

[Avg Idle Time](#)

[Busy](#)

[CAL Overdue](#)

[CAL Reminders](#)

[IN Avg Handle Time](#)

[IN Handled](#)

[Logged In](#)

[Not Ready](#)

[OUT Handled](#)

[OUT Rejected](#)

[Occupancy](#)

[Ready](#)

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Service Metrics View

Service metrics are located in the Supervision section of Agent Desktop and displayed in the middle 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. To manually sort the metrics, click on the desired metric name; the default sort view is high to low. By default, services are sorted alphabetically.

The bottom row of the service metrics view displays the cumulative values for all currently displayed services. In the *Name* column, the bottom row shows the total number of currently displayed services. For detailed descriptions of the available service metrics, see section [List of Service Metrics](#). For definitions of all real-time metrics, see [List of All Real-Time Metrics](#) in the *Reporting Reference Guide*.

Service Metrics for One Team

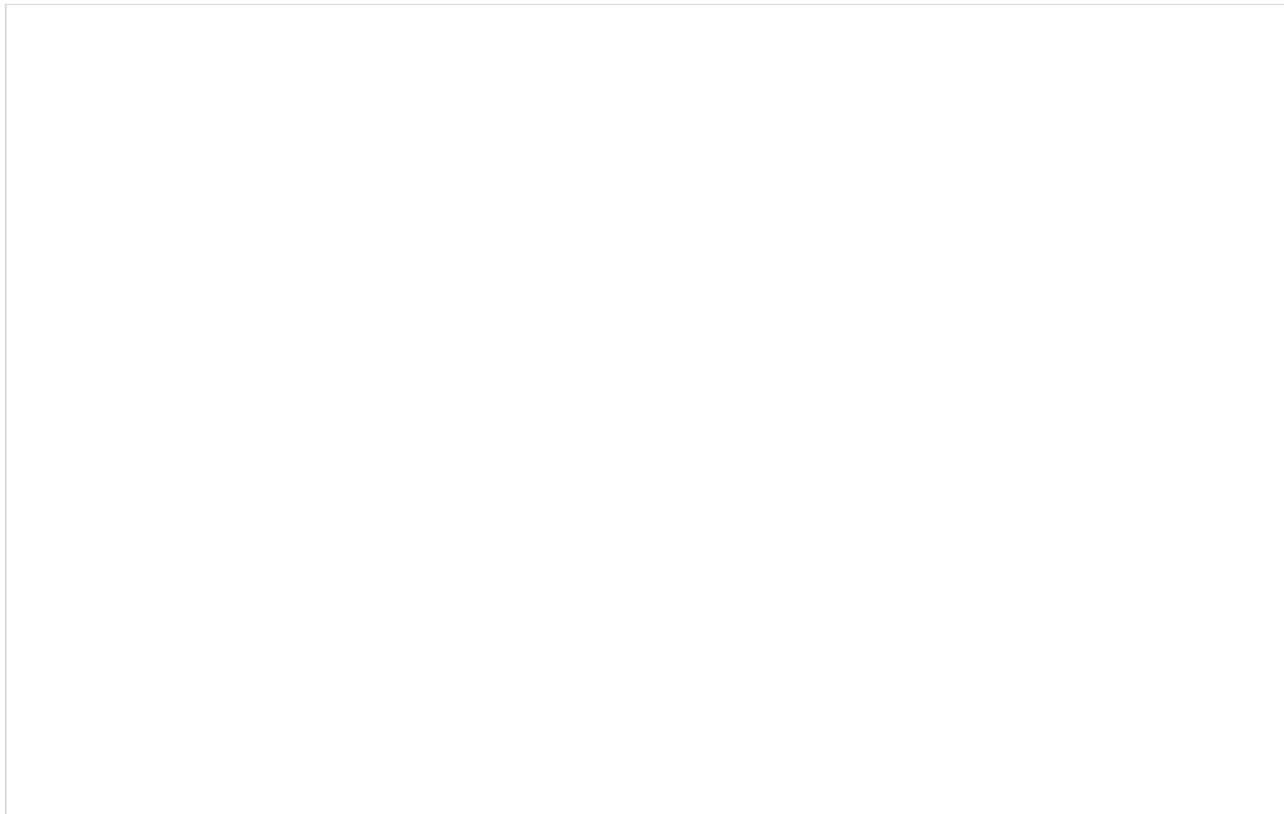
To view the service metrics for one team, select the desired team name from the available list of teams located at the top of the Context Information Area. Doing this will cause that team's service metrics to appear in the middle of the Context Information area. For any team selected, the name of the team appears next to the word "Services."



Service metrics displayed here are for the Customer Service team

Service Metrics for All Teams

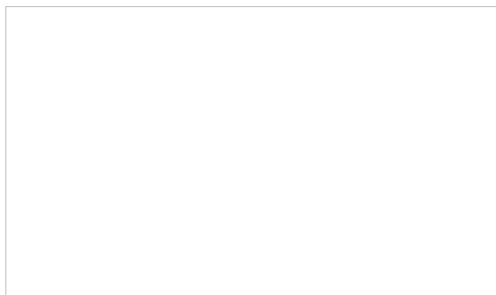
Selecting **All Teams** from the teams list will display the service metrics for all teams for which the supervisor is assigned to appear in the Context Information area. You can tell, at a glance, that the view includes service metrics for all teams by looking at the view's title, which shows "All Teams" next to the word "Services."



Supervisors may view service metrics for all teams they have permission to supervise

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

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List of Service Metrics

The following is a list of service metrics. For definitions of these metrics, as well as a complete list of real-time metrics, see [List of All Real-Time Metrics](#) in the *Reporting Reference Guide*. The metrics here are listed in alphabetical order.

[Busy](#)

[Busy Svc](#)

[CB Abandoned](#)

[CB Canceled](#)

[CB Connected](#)

[CB Dialed](#)

[CB Failed](#)

[CB Queued](#)

[CB Requested](#)

[CB Waiting](#)

[IN ASA](#)

[IN Active](#)

[IN Agent Disconnected](#)

[IN Avg Talk Time](#)

[IN Breached SLA](#)

[IN Carried Over](#)

[IN Carried Over New](#)

[IN Closed](#)

[IN Desktop](#)

[IN EWT](#)

[IN Handled](#)

[IN Handled New](#)

[IN Handled Unique](#)

[IN Handled Unique %](#)

[IN IVR Abandoned](#)

[IN IVR Dropped](#)

[IN in IVR](#)

[IN Max Wait](#)

[IN Queue Abandoned](#)

[IN Queue Abandoned %](#)

[IN Queue Dropped](#)

[IN Queue Sh-Abandoned](#)

[IN Queue Sh-Abandoned %](#)

[IN Queued](#)

[IN Queued Unique](#)

[IN Received](#)

[IN Received New](#)

[IN Rejected](#)

[IN Remote Disconnected](#)

[IN Replied](#)

[IN Ringing](#)

[IN Ringing Abandoned](#)

[IN Ringing Dropped](#)

[IN Routed](#)

[IN Self Serviced](#)

[IN Svc Change Received](#)

[IN Svc Changed](#)

[IN Svc Level %](#)

[IN Svc Level Day %](#)

[IN Total Abandoned](#)

[IN Total Abandoned %](#)

[IN Total Talk Time](#)

[IN Transferred](#)

[IN Waiting](#)

[IN in Progress](#)

[IN on Hold](#)

[IN on Hold Unique](#)

[Logged In](#)

[Not Ready](#)

[OUT Abandoned](#)

[OUT Abandoned %](#)

[OUT Active](#)

[OUT Agent Disconnected](#)

[OUT Answered](#)

[OUT Answered %](#)

[OUT Avg Talk Time](#)

[OUT Dialed](#)

[OUT Handled](#)

[OUT IVR Abandoned](#)

[OUT IVR Abandoned %](#)

[OUT IVR Dropped](#)

[OUT in Progress](#)

[OUT Queue Abandoned](#)

[OUT Queue Abandoned %](#)

[OUT Queue Dropped](#)

[OUT Rejected](#)

[OUT Remote Disconnected](#)

[OUT Ringing](#)

[OUT Ringing Abandoned](#)

[OUT Ringing Dropped](#)

[OUT Routed](#)

[OUT Total Talk Time](#)

[OUT Transferred](#)

[OUT Unattended](#)

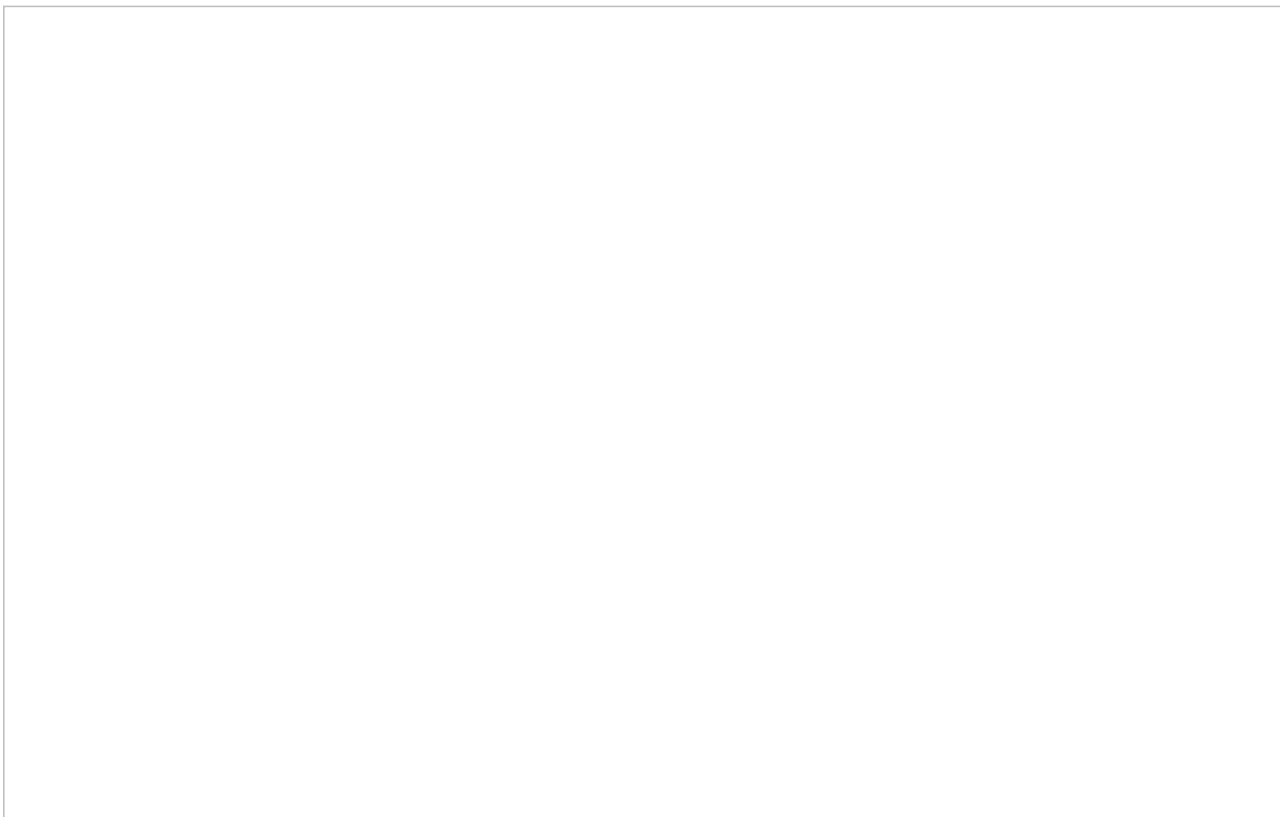
[OUT Unattended %](#)

[Occupancy](#)

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 the **close** icon in the upper right-hand corner.

For detailed descriptions of skill metrics, see section [List of Skill Metrics](#). **Please note:** Skill metrics view is not available for email services.

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 Metrics

For definitions of these metrics, as well as a complete list of real-time metrics, see [List of All Real-Time Metrics](#) in the *Reporting Reference Guide*.

[IN Active](#)

[IN Max Wait](#)

[IN Waiting](#)

[Logged In](#)

[Ready](#)

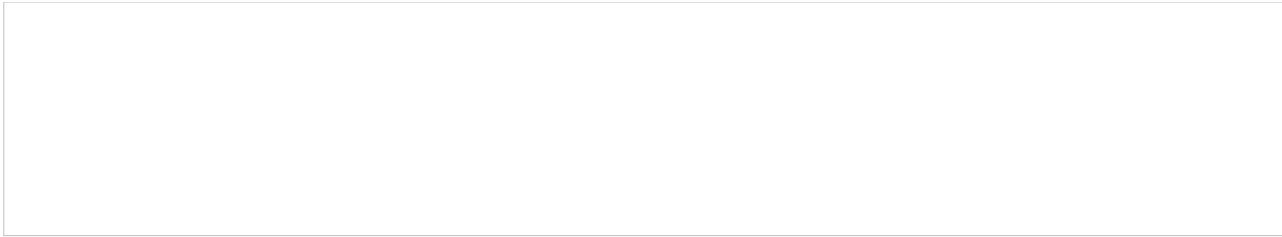
[< Previous](#) | [Next >](#)

Agent Metrics View

Agent metrics are displayed in the Supervision section of Agent Desktop and displayed at the bottom of the Context Information Area. 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. For a list and definitions of all agent metrics, see [List of Agent Metrics](#).

All Teams Agents

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. Not only does this view show agents from all teams assigned to the logged in supervisor, the *All Teams Agents* view shows all services that the teams are assigned to (note that individual services can be hidden, if needed).

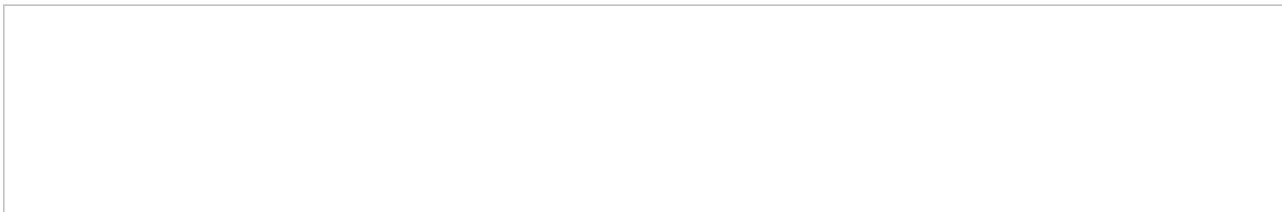


All Teams agents view

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.

Individual Teams Agents

To view agent metrics from an individual team you have been assigned to supervise, select the desired team from [Teams](#) and agents from this team will be shown at the bottom of the Context Information Area. The default view will show only agents currently logged in.



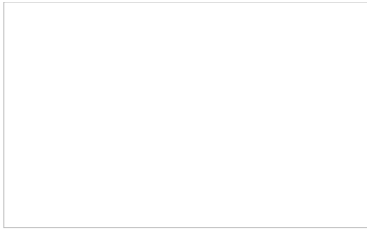
A view of agent metrics from the Customer Service team

Subteams

A subteam is a subset of agents from an individual 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.

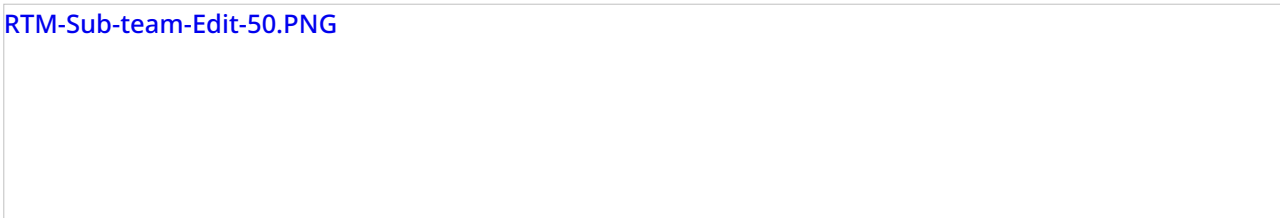


Adding and Removing Agents

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.

[RTM-Sub-team-Edit-50.PNG](#)



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

Default Agent Metrics

Upon selecting either [All Teams](#) or an [individual team](#), the following metrics will be displayed for agents:

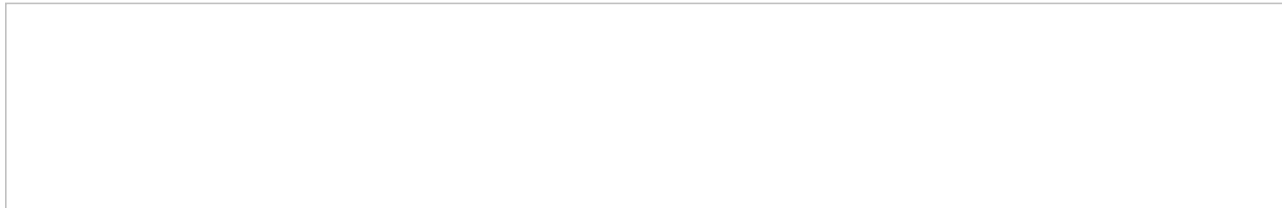
- Agent state icon
- Agent interaction type

- Name
- Sentiment
- Time in State
- IN Handled
- IN Rejected
- OUT Rejected
- OUT Handled
- Occupancy
- Active
- Interaction
- Service
- Talk
- Hold
- Rec

Additional metrics can be added, [customized](#), arranged as you see fit. For a complete list of agent metrics, see [List of Agent Metrics](#).

Sorting

You can have agents sorted automatically by the value of any currently displayed metric. To sort the metrics, click on the name of the metric; the default sort view is high to low. To sort low by high, click on the metric name again. By default, agents are sorted alphabetically.



A view of metrics as sorted by Time in State

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:

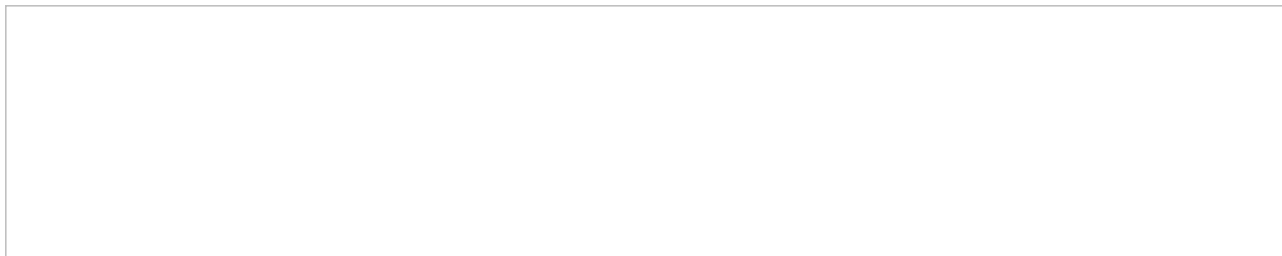
- Outbound interaction in progress (dialing, talk or hold)
- Inbound interaction in progress (ringing, talk or hold)

- 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](#).

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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](#). For definitions of these metrics, as well as a complete list of real-time metrics, see [List of All Real-Time Metrics](#) in the *Reporting Reference Guide*. Metrics here are arranged in alphabetical order.

[ACW Time](#)

[Active](#)

[Agent State](#)

[Avg ACW Time](#)

[Avg Idle Time](#)

[Avg Preview Time](#)

[Avg Reply Time](#)

[BT](#)

[Busy Time](#)

[CAL Overdue](#)

[CAL Reminders](#)

[CSAT](#)

[FCR](#)

[Hold](#)

[IN Avg Handle Time](#)

[IN Avg Talk Time](#)

[IN Active](#)

[IN Breached SLA](#)

[IN Carried Over](#)

[IN Carried Over New](#)

[IN Closed](#)

[IN Desktop](#)

[IN Handled](#)

[IN Handled New](#)

[IN Handled Unique %](#)

[IN Offered](#)

[IN Pulled](#)

[IN Rejected](#)

[IN Replied](#)

[IN Svc Changed](#)

[IN Total Talk Time](#)

[IN Transferred](#)

[IN on Hold](#)

[IN on Hold Unique](#)

[Idle Time](#)

[Lists P.A. Completed](#)

[Lists P.A. Remaining](#)

[NPS](#)

[OUT Agent Disconnected](#)

[OUT Desktop](#)

[OUT Discarded](#)

[OUT Handled](#)

[OUT Rejected](#)

[OUT Remote Disconnected](#)

[OUT Transferred](#)

[Occupancy](#)

[Preview Duration](#)

[Previewed](#)

[Ready Time](#)

[Sentiment](#)

[Skipped](#)

[Skipped %](#)

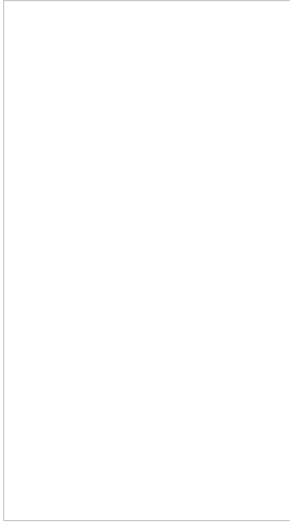
[Survey 1](#)

[Survey 2](#)

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Real-Time Metric Alerts

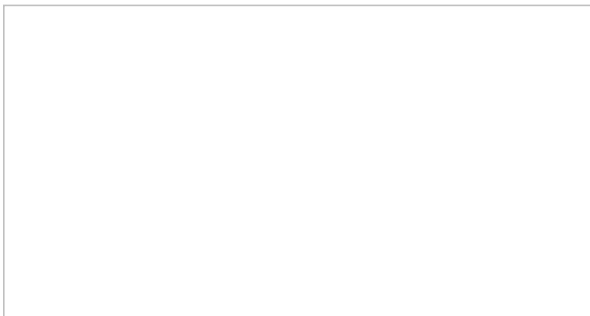
You can set thresholds for some of the service, campaign, and agent metrics and be visually alerted whenever the current values of the corresponding metrics reach those thresholds.



Alert configuration
option

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. 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.



Alerts can appear as pop-up windows

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 in the area adjacent to the name of the statistic for which you would like to set or change the threshold and select the **Custom** box.

4. Enter the desired threshold value.
5. Click **Apply**.

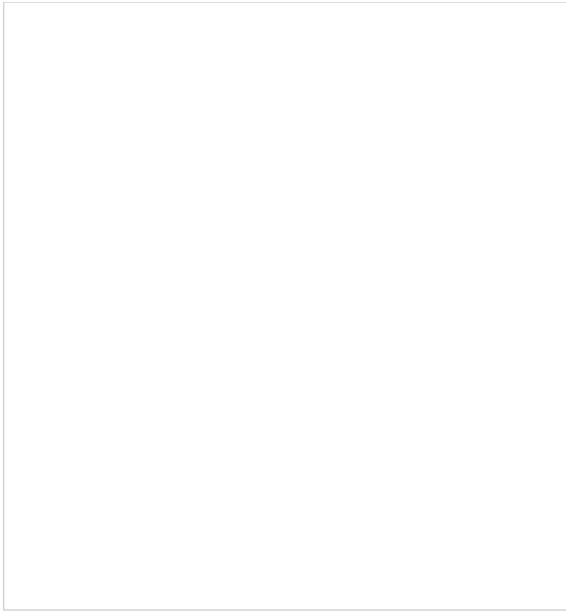


Alert configuration

Changing Alert Colors

You can customize the color of the text and background of alerts. To do this, follow these steps:

1. Click the **Settings** in the upper right corner of the Agent Desktop.
2. Select **Alert Configuration** from the drop-down menu.
3. Click in the area adjacent to name of the statistic that you would like to change the color of and select the **Custom** box.
4. From here, click the **Color** field to access *Alert Colors*.
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, and click **OK**.
6. Back in Alert Configuration, click **Apply**.

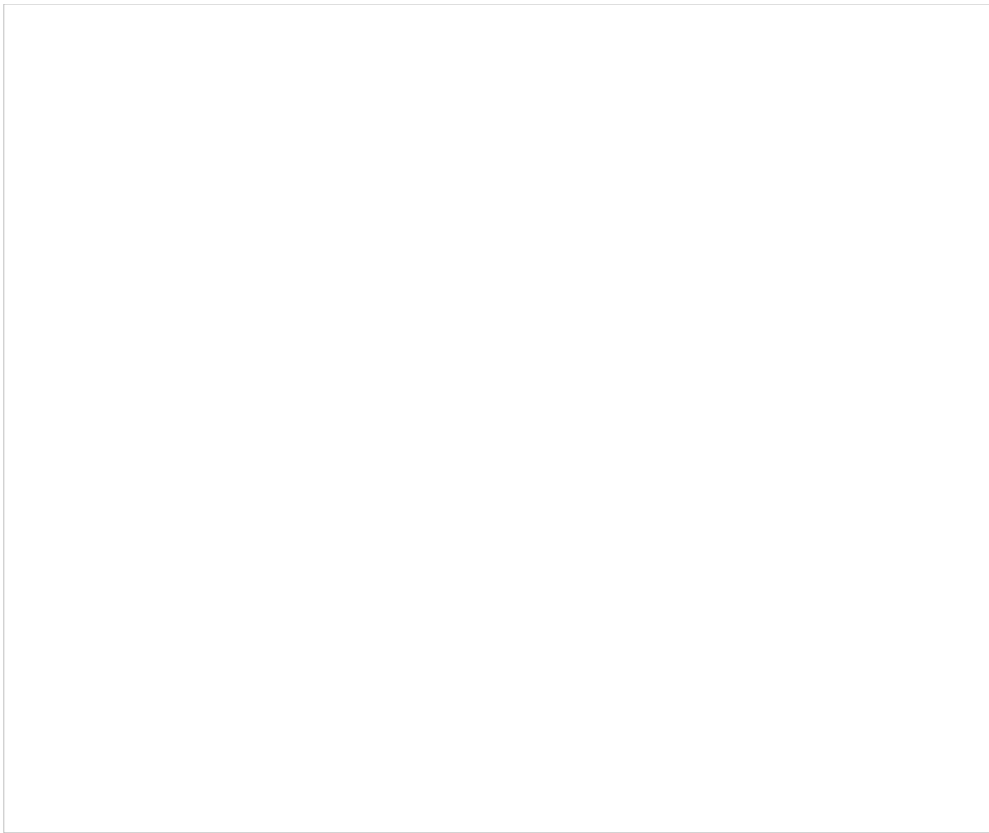


Customize alert colors

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, follow these steps:

1. Click the **Settings** in the upper right corner of the Agent Desktop.
2. Select **Alert Configuration** from the drop-down menu.
3. Click in the area adjacent to the name of the statistic for which you would like to set or change the threshold and select the **Custom** box.
4. Enter the desired threshold value.
5. Click the **Set as System Default** button.



Changing threshold settings

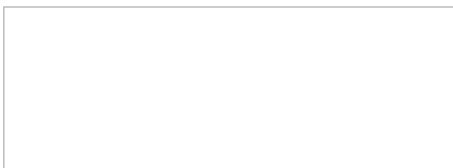
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Changing Agent State

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.



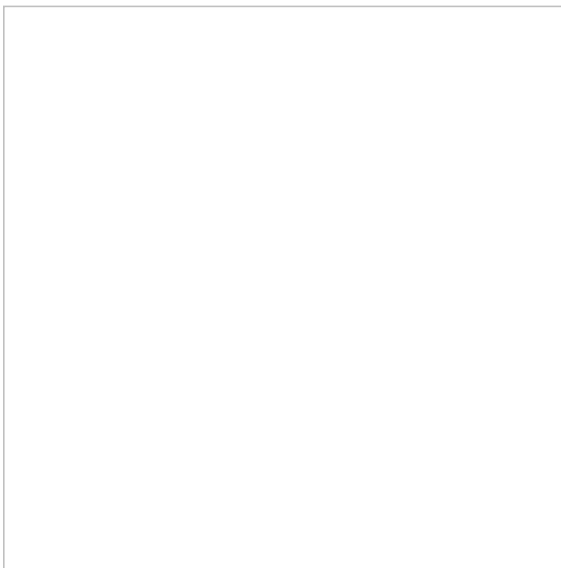
Changing agent state

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.

Group Chat

The Group Chat feature allows agents, supervisors, and other users to chat within your contact center. Many features of Group Chat are similar to Internal Chat and Service Chat; however, Group Chat is not for chatting with individual users or customers.

For specific Group Chat information, please refer to [How to Use Group Chat](#)



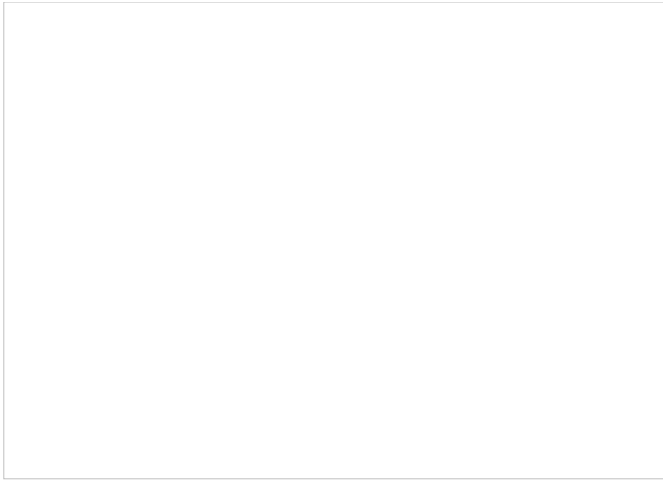
Overview of Group Chat

Call Recording

As a supervisor, you can record conversations of any members of your team with customers; call recording is activated automatically by [monitoring](#) an agent in the [Busy](#) state.

To trigger automatic call recording, select an agent from the [agent metrics view](#), located at the bottom of the Supervision screen. If the customer is a saved contact in your contact center, when you begin monitoring the agent, your screen will pop displaying the customer's contact information. The *Contact Info Panel* will display various active management controls, including the call recording button. From here, you may choose to stop and restart call recording as you wish.

Note that depending on your call center's configuration and practices, some or all calls may be recorded automatically as soon as they are established. Agents also may have privileges to start call recordings. Call recordings are stored in the system and can be reviewed at a later time. See section [Quality Management](#) for more information.



Supervisor monitoring call controls

How to Stop and Start Recording

To stop recording at any time:

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

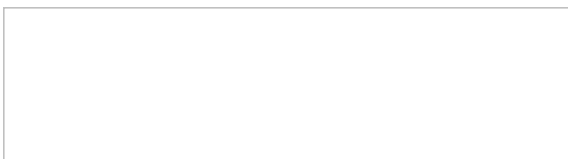
To begin recording:

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

Note that both the ability to start recording and the ability to stop recording are separate privileges. If you do not have the privilege to **stop** recording, the **Stop recording** icon will appear in a lightened state and you will not be able to select it.

Call Monitoring, Coaching, and Barge-In

As a supervisor, you can connect to a service call or chat 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 interaction. Note that the agent may send you a chat message (see section [Individual Chat](#)) or flag an interaction that the agent needs immediate help handling. When the interaction 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:

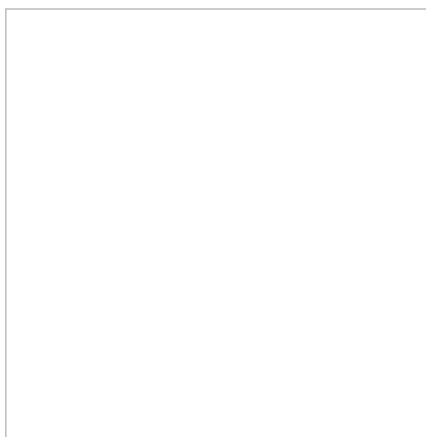
- **Monitor** - In this mode, you may observe the interaction. For calls, this means you can hear the conversation between the agent and the customer, but neither of them can hear you; for chats, this means you can observe the interaction as it is happening. Note that the agent will not have any indication that his interaction 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 may provide feedback to agents while observing the interaction. For calls, this means 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. For chats, this means you can see the chat as it is happening and chat with the agent without any indication to the customer.
- **Barge-in** - In this mode, both the customer and the agent will hear you speak or see you chat and will be able to interact with to you.

You can connect to a service call or chat 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 interaction. 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 an active interaction 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 an interaction 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.

If on a call, 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.

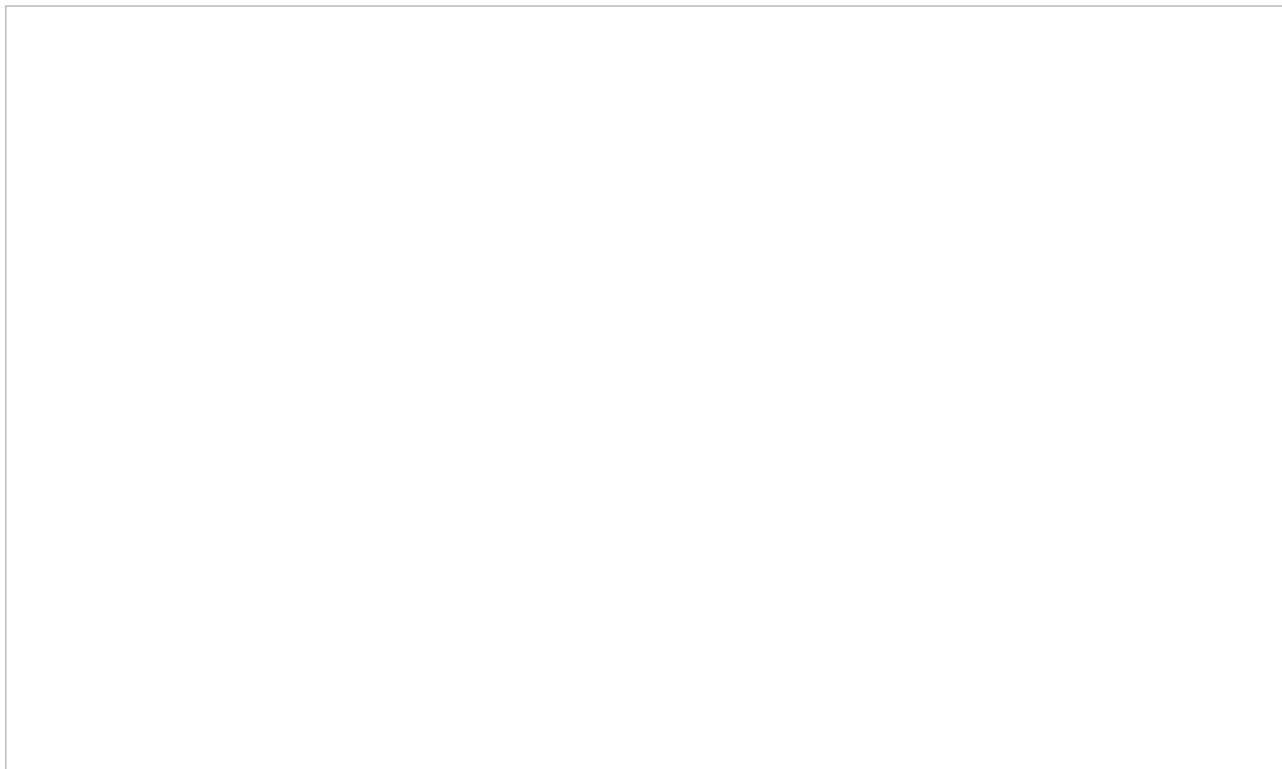
To stop the supervision activity for this call:

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](#).



An example of a supervisor's screen after barging-in on a flagged chat

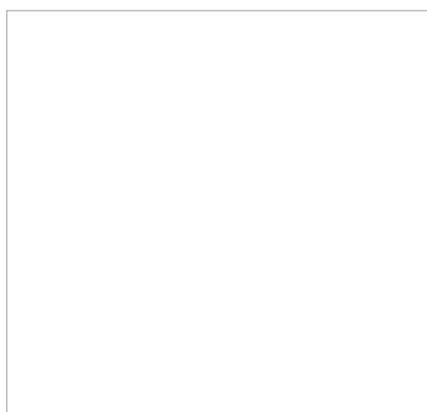
Continuous Agent Monitoring

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. In section Supervision, select the desired agent from the [individual teams agents](#) list, located at the bottom of the screen.
2. A window will pop, displaying the [monitoring functions](#).
3. 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:

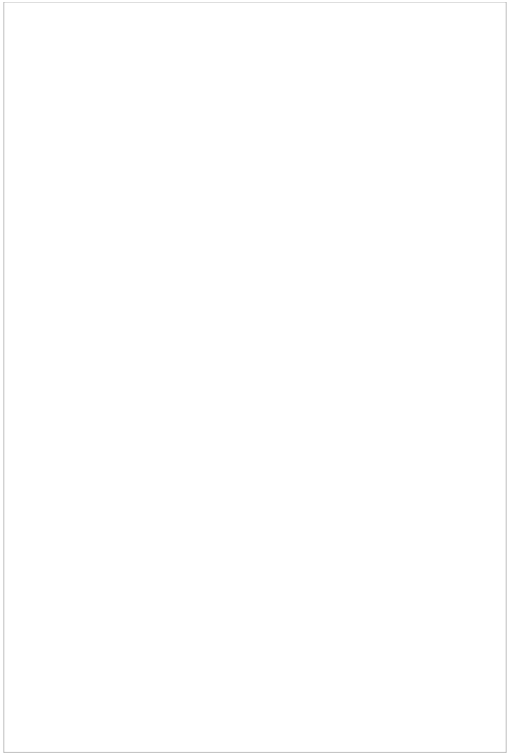
Simply deselect the checkbox.

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.

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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.

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 [How to Open the Calendar](#).

Working with Agent Calendars

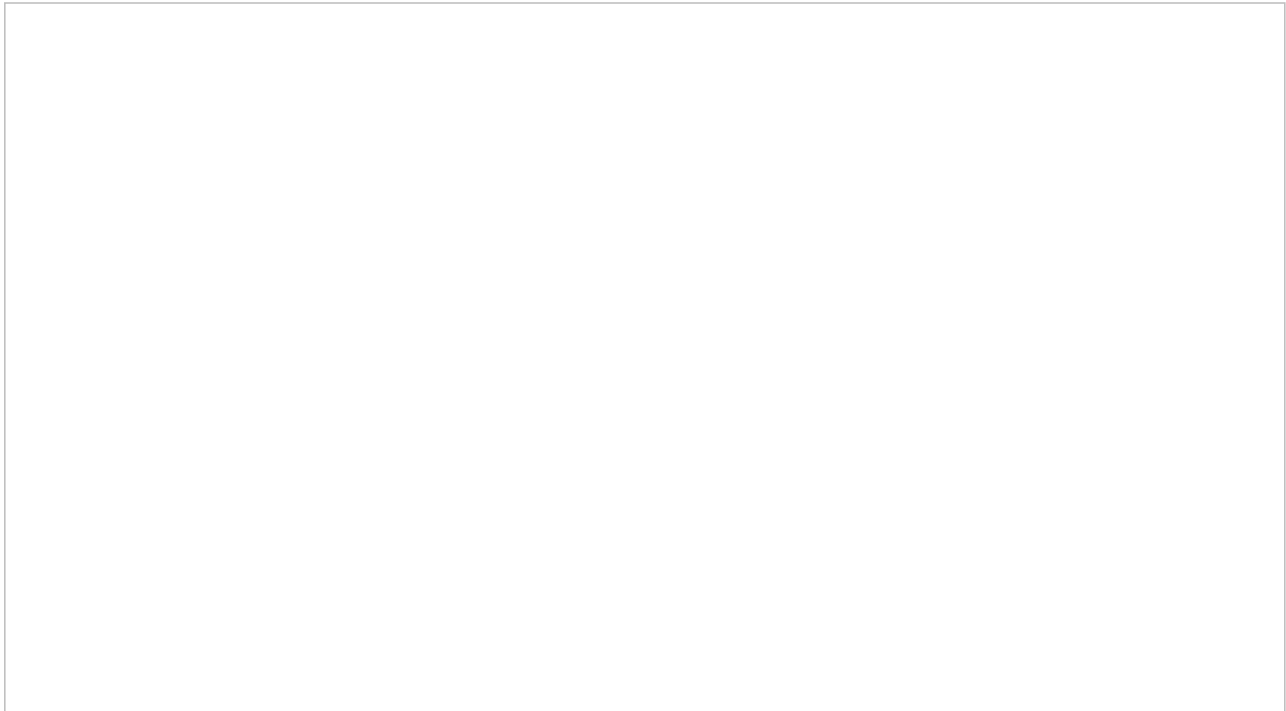
In addition to using your own calendar for your personal scheduled events (as a supervisor), you can also view calendars of members of your team and reassign their scheduled tasks to other agents.

How to View an Agent's Calendar

There are a couple ways to view the calendar of an agent on your team. You can access their calendars from your own personal calendar, or you can navigate to their calendars from the agent management functions available on your *Supervision* screen.

From Your Own Calendar

1. To view an agent's calendar from your own calendar, click the **Calendar** icon on Agent Desktop's main menu. Your calendar will be shown in the Context Information Area.



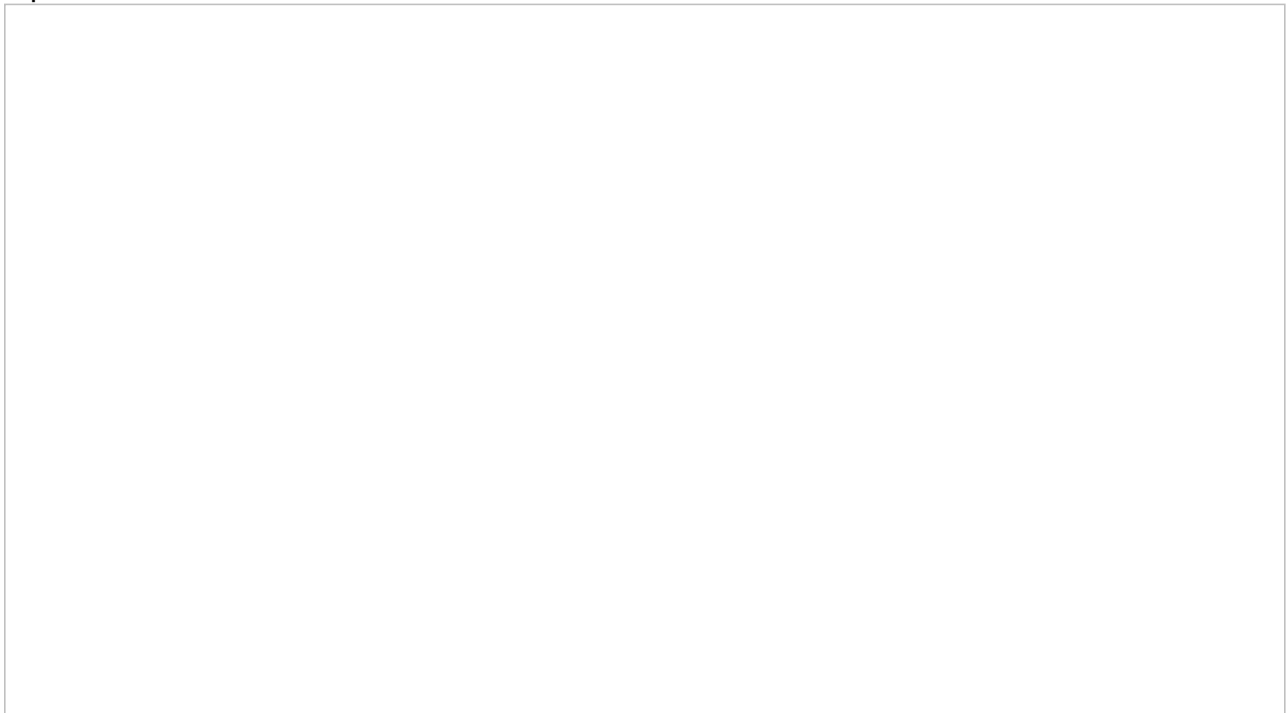
Calendar

2. At the top of the calendar, to the right of your name, select the down arrow to display a drop-down list of users in your directory.



Select a user from the directory

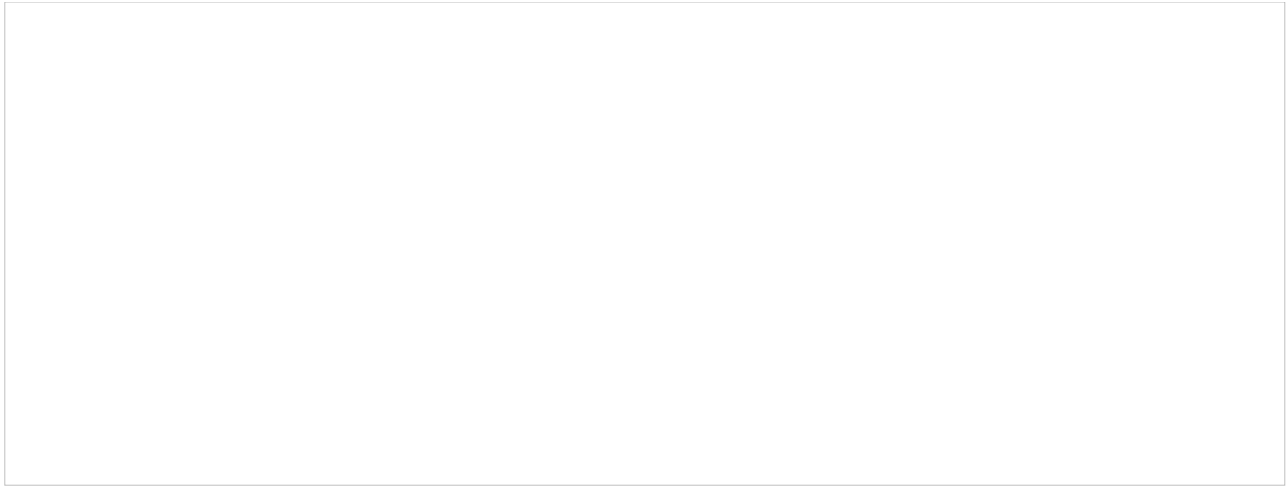
3. Select the name of the agent whose calendar you wish to view. The agent's calendar will be shown in your Context Information Area. You can tell whose calendar you are viewing by looking at the name shown at the top of the calendar.



Viewing an agent's calendar

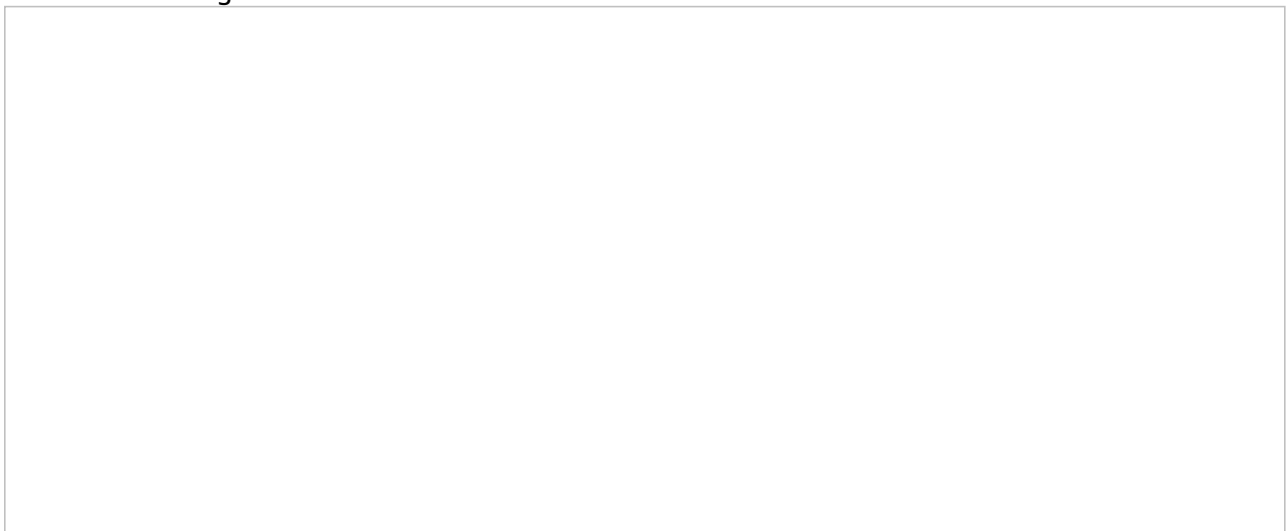
From Your Supervision Screen

1. To view an agent's calendar from your *Supervision* screen, click the **Supervision** icon in Agent Desktop's main menu. Metrics about your teams, services, and agents will be shown in the Context Information Area.



Supervision metrics in the Context Information Area

2. Select the desired agent from the [Agent Metrics View](#). A pop-up card will display agent management functions for the selected agent.



Agent management functions

3. Click the **Show Agent's Calendar** button . The agent's calendar will be popped to your *Context Information Area*.

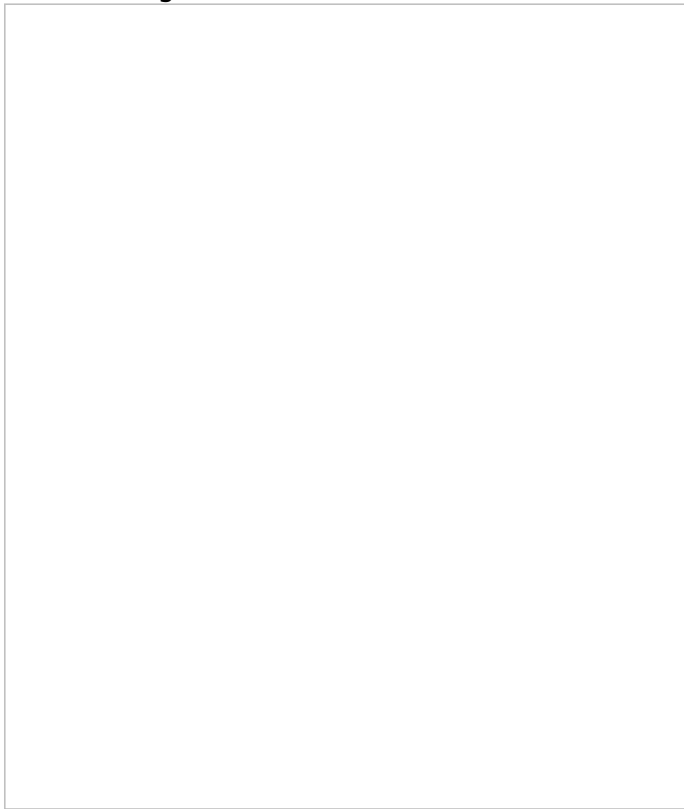
How to Reassign an Event

1. To reassign a single agent's event to another agent, view the agent's calendar. See section [How to View an Agent's Calendar](#).
2. Select the event in the agent's calendar that you want to reassign. The event properties on the right will display the event information.



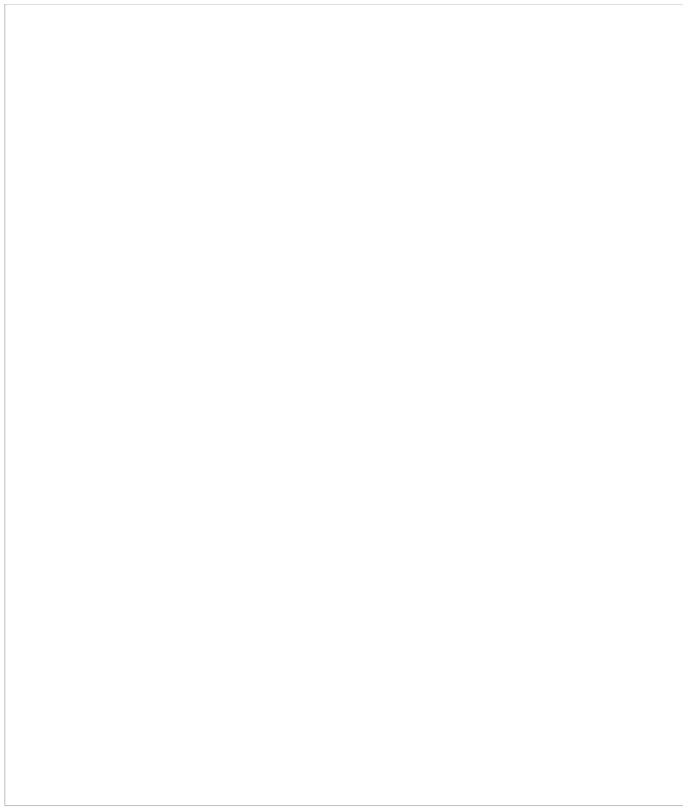
Calendar and event properties

3. Click the **Assign...** button. A dialog window will appear, showing the list of agents to which this task can be assigned. To find a specific agent quickly, you can start typing the agent's name in the **Enter search term** field and matching users will be listed in search results.



You can search for a specific agent

4. Select the desired agent and click **Ok**.

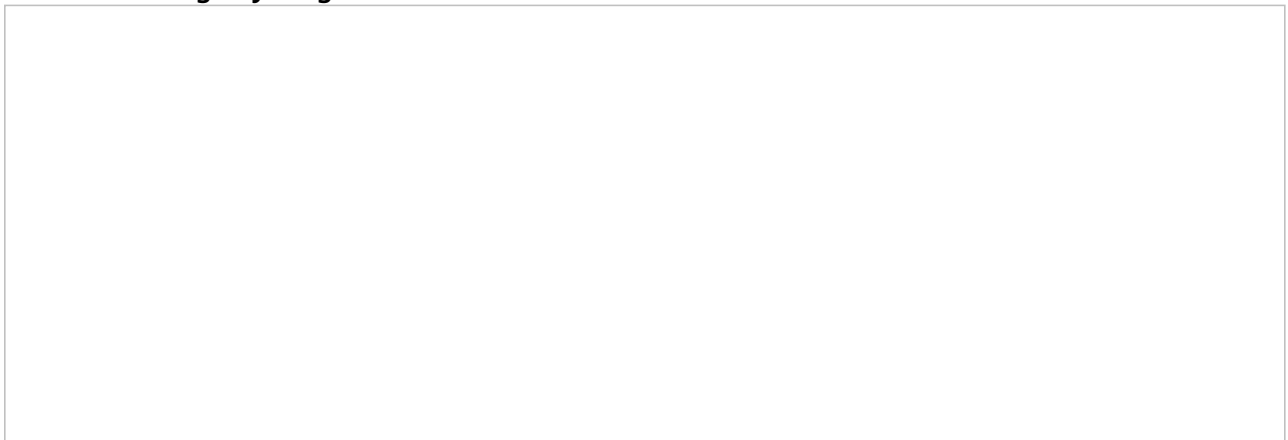


Reassign an event to a selected agent

How to Reassign All of an Agent's Events to Another Agent

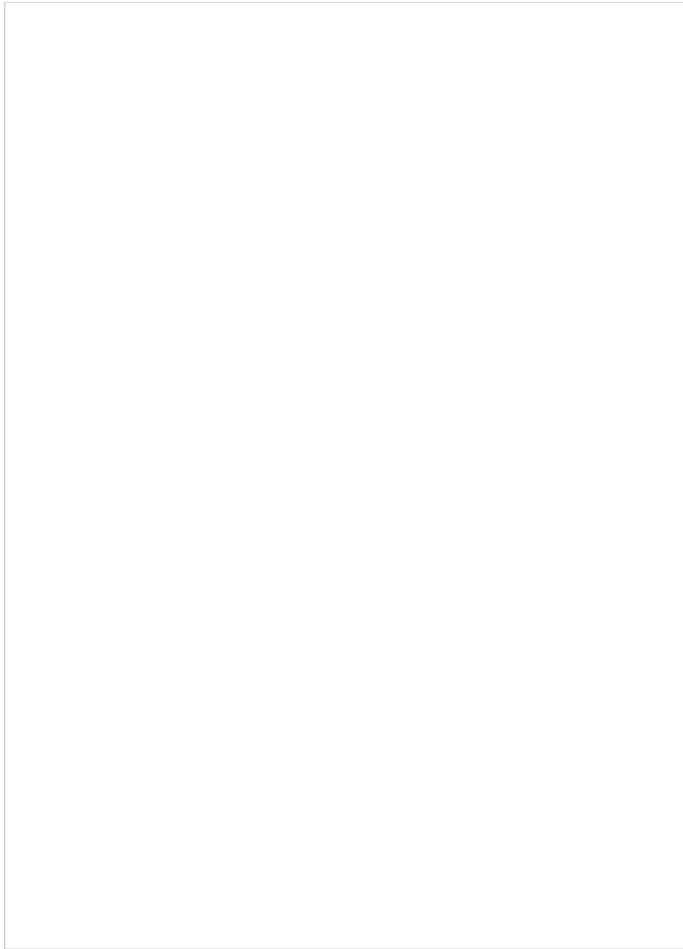
Sometimes it may be more convenient to reassign all of the agent's events within a time range in a single step.

1. Click the **Reassign by range...** button.



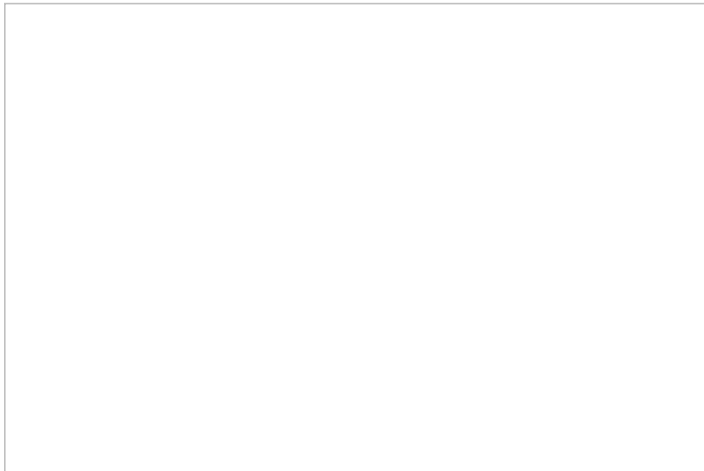
Reassign by Range button

2. A dialog window will appear showing the list of agents that this task can be assigned to and time range controls.



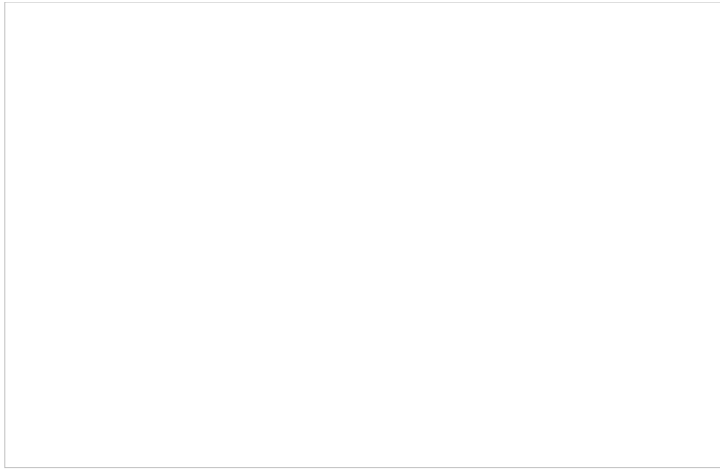
Select an agent to be assigned a range of events

3. Specify the desired time range by either typing in the date or clicking into the date field and selecting the date from the mini calendar.



Select the date range

4. Select the desired agent and click **Ok**.



Select the agent

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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](#).

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Working With Agent Calendars


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 [How to Open the Calendar](#).

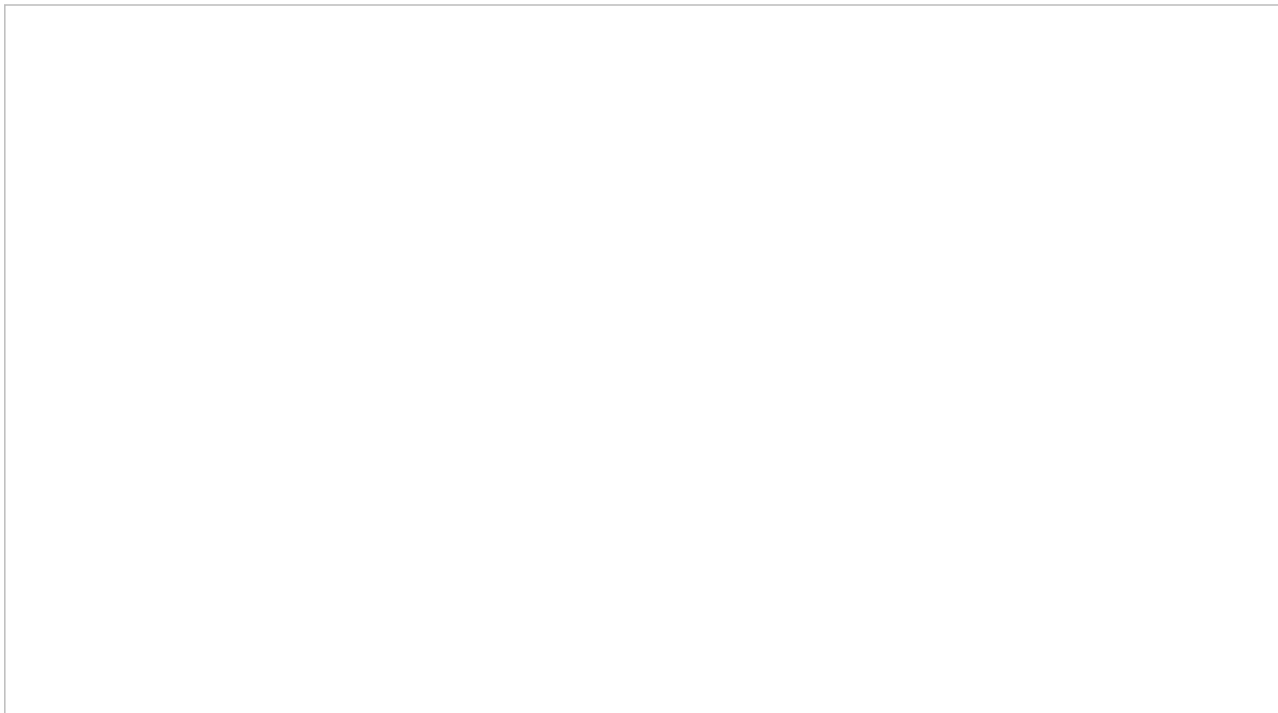
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How to View an Agent's Calendar

There are a couple ways to view the calendar of an agent on your team. You can access their calendars from your own personal calendar, or you can navigate to their calendars from the agent management functions available on your *Supervision* screen.

From Your Own Calendar

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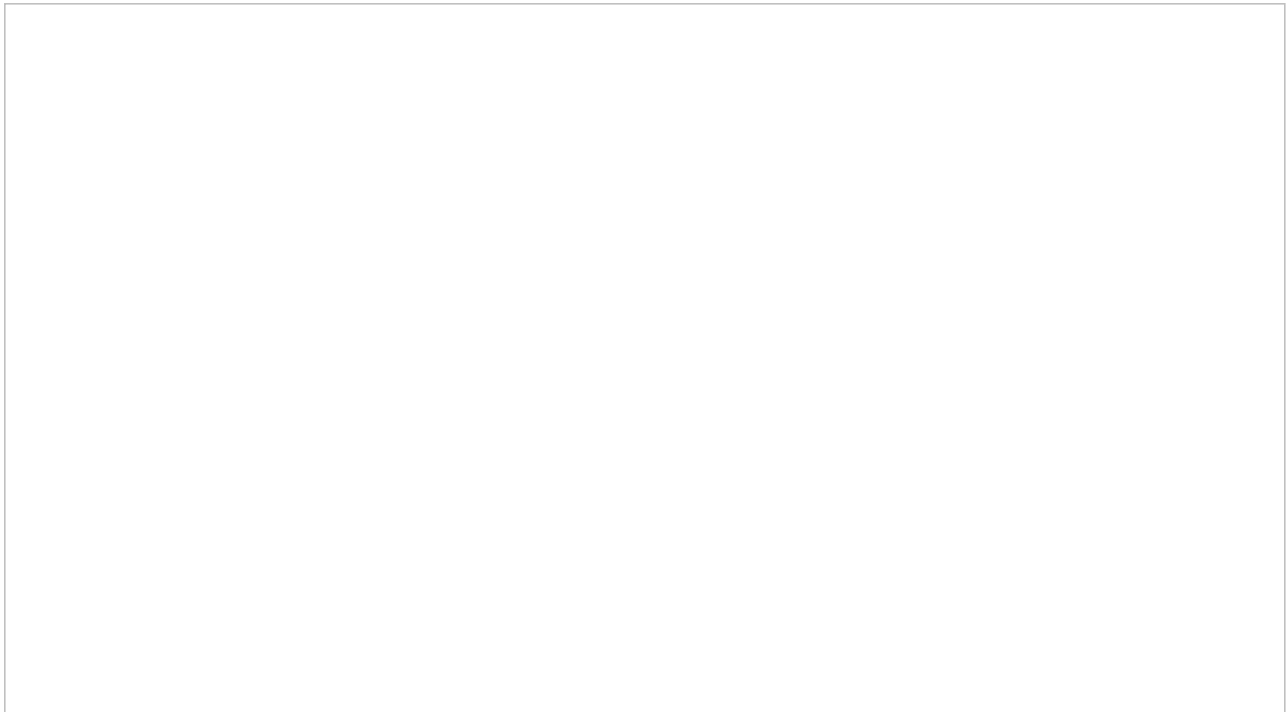
Calendar

2. At the top of the calendar, to the right of your name, select the down arrow to display a drop-down list of users in your directory.



Select a user from the directory

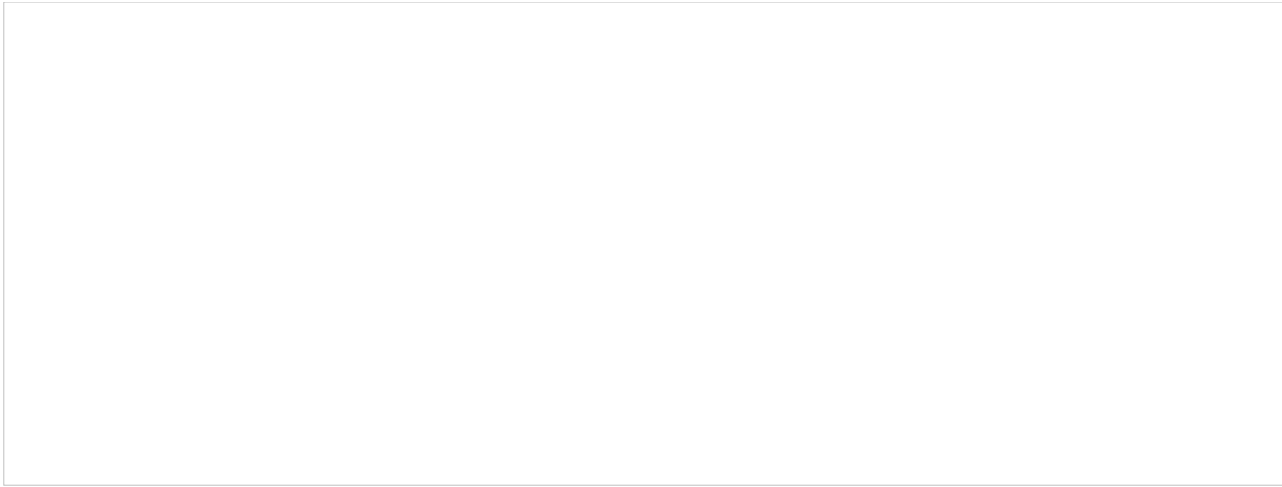
3. Select the name of the agent whose calendar you wish to view. The agent's calendar will be shown in your Context Information Area. You can tell whose calendar you are viewing by looking at the name shown at the top of the calendar.



Viewing an agent's calendar

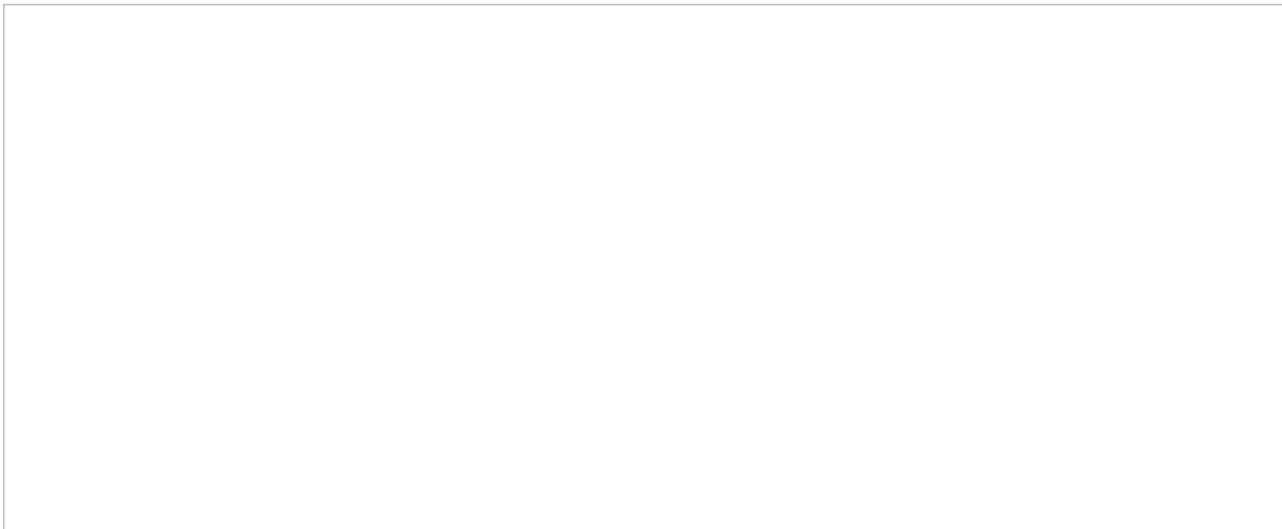
From Your Supervision Screen

1. To view an agent's calendar from your *Supervision* screen, click the **Supervision** icon in Agent Desktop's main menu. Metrics about your teams, services, and agents will be shown in the Context Information Area.



Supervision metrics in the Context Information Area

1. Select the desired agent from the [Agent Metrics View](#). A pop-up card will display agent management functions for the selected agent.



Agent management functions

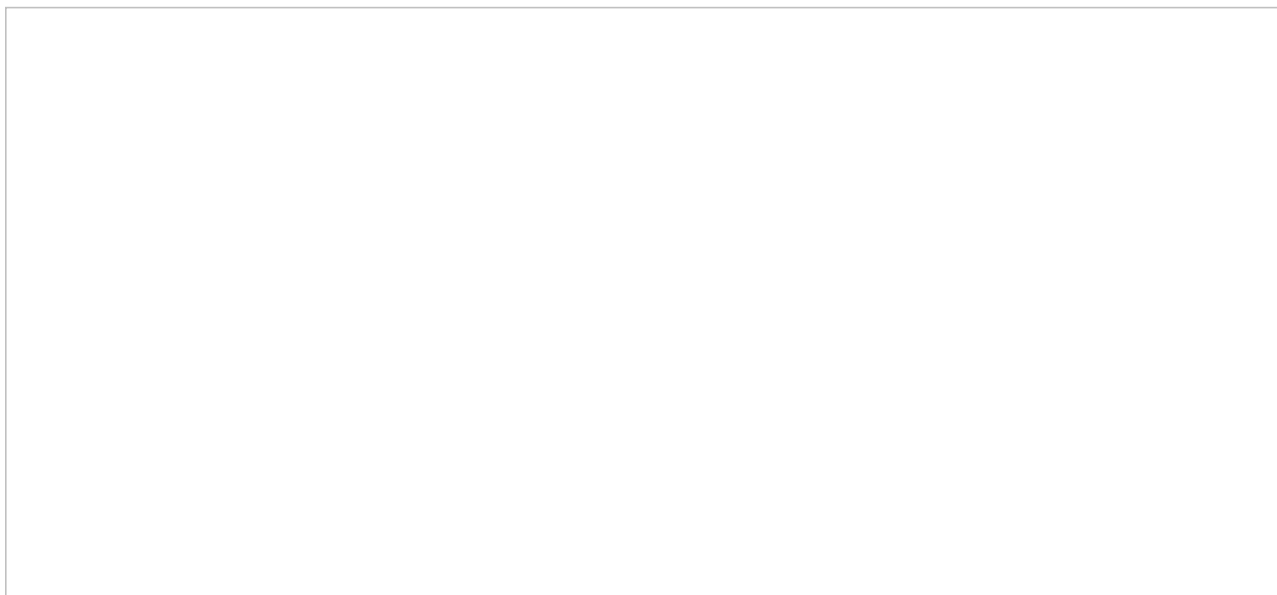
1. Click the **Show Agent's Calendar** button . The agent's calendar will be popped to your *Context Information Area*.

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How to Reassign an Event

To reassign a single agent's event to another agent, view the agent's calendar. See section [How to View an Agent's Calendar](#).

1. Select the event in the agent's calendar that you want to reassign. The event properties on the right will display the event information.



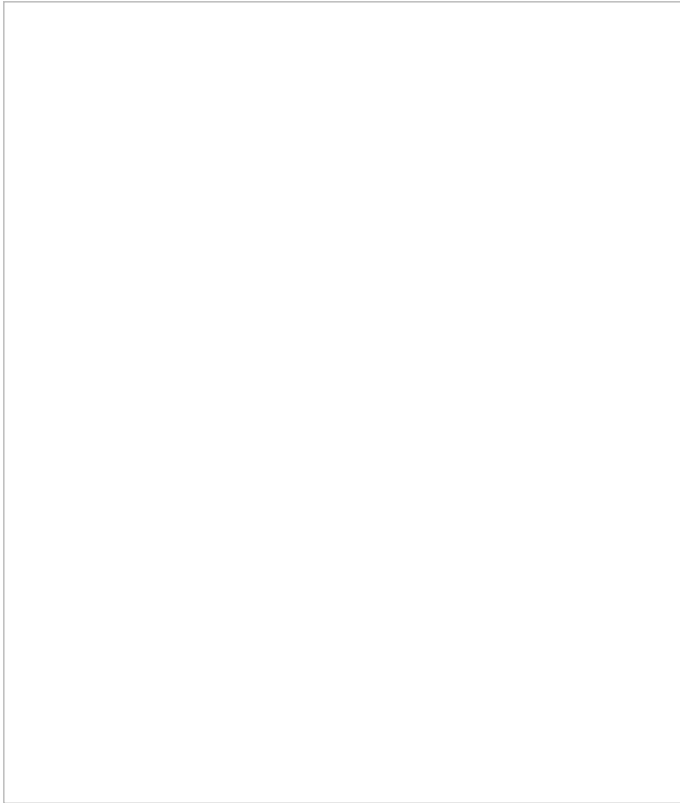
Calendar and event properties

1. Click the **Assign...** button. A dialog window will appear, showing the list of agents to which this task can be assigned. To find a specific agent quickly, you can start typing the agent's name in the **Enter search term** field and matching users will be listed in search results.



You can search for a specific agent

1. Select the desired agent and click **Ok**.



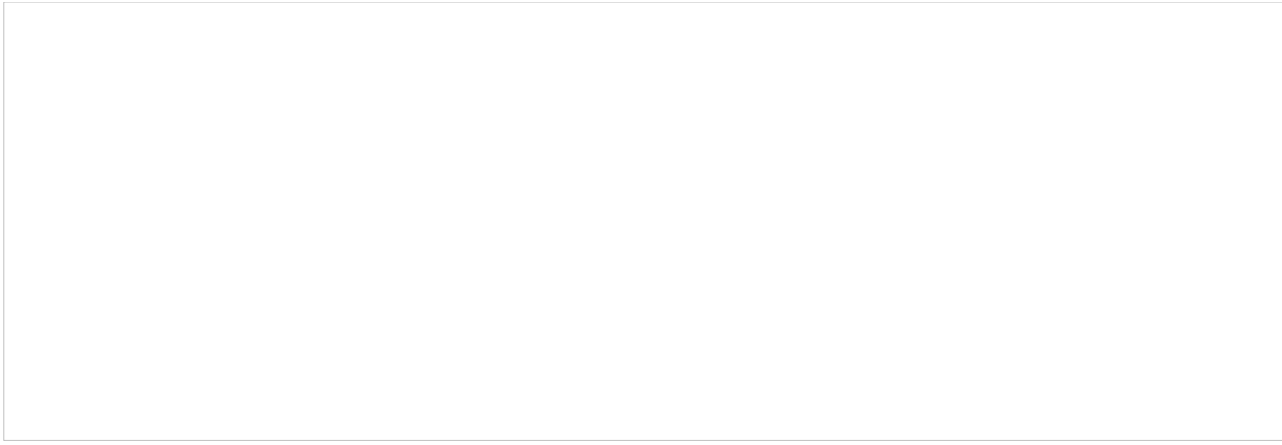
Reassign an event to a selected agent

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How to Reassign All of an Agent's Events to Another Agent

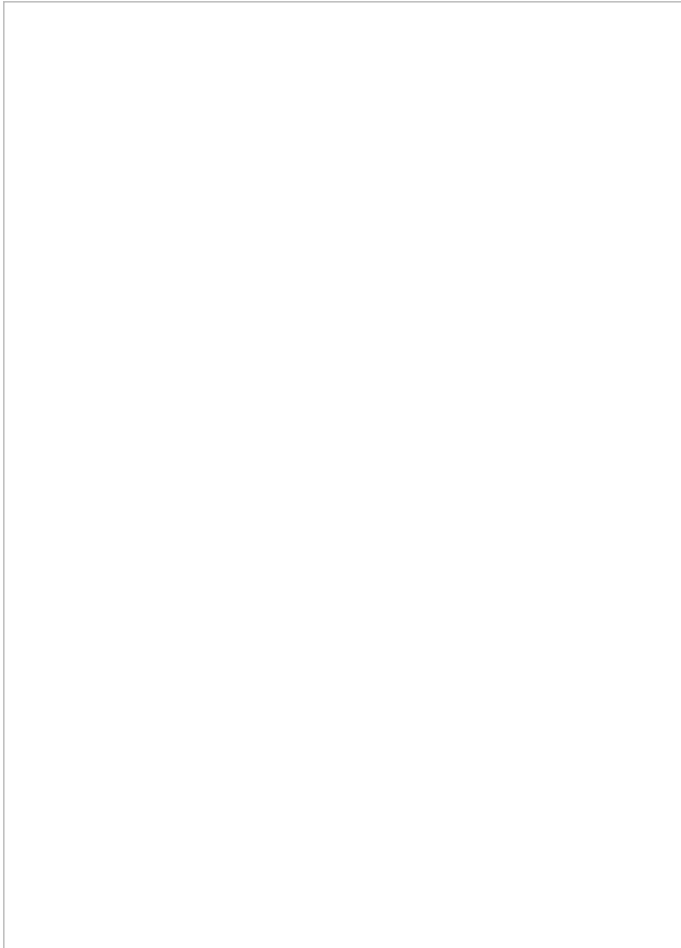
Sometimes it may be more convenient to reassign all of the agent's events within a time range in a single step.

1. Click the **Reassign by range...** button.



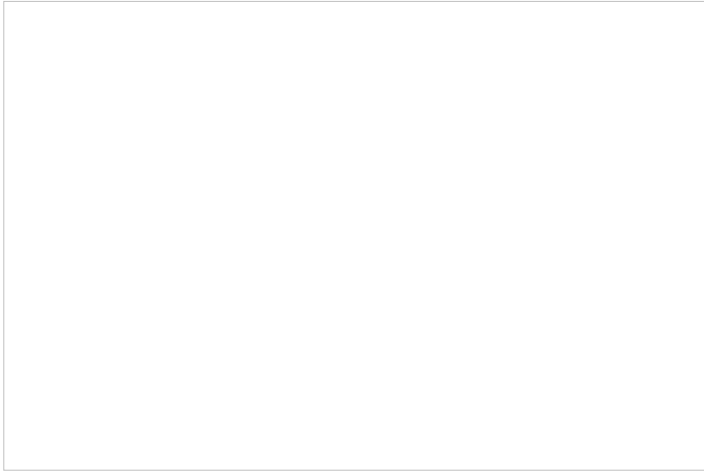
Reassign by Range button

1. A dialog window will appear showing the list of agents that this task can be assigned to and time range controls.



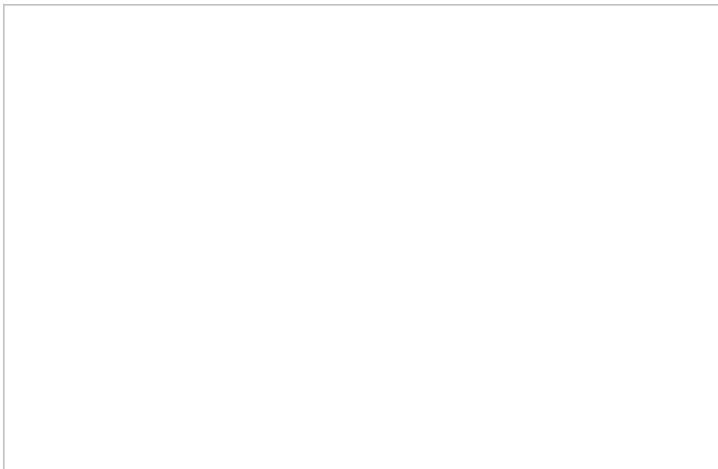
Select an agent to be assigned a range of events

1. Specify the desired time range by either typing in the date or clicking into the date field and selecting the date from the mini calendar.



Select the date range

1. Select the desired agent and click **Ok**.



Select the agent

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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.



Campaign operations view

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](#)

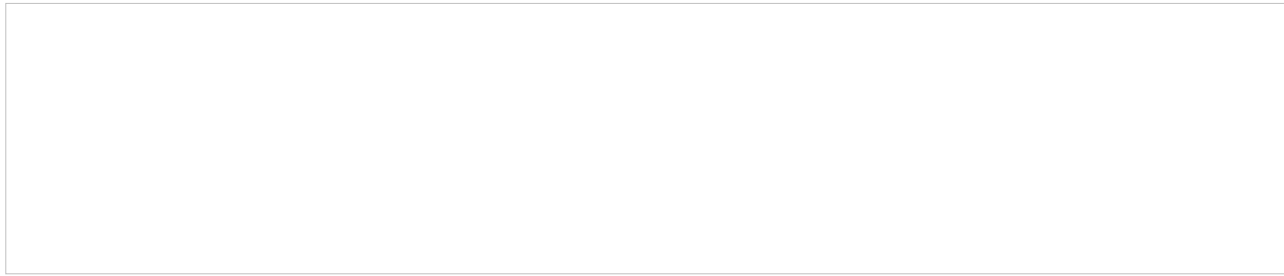
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General Campaign Metrics View

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](#).

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Individual Campaign Metrics View

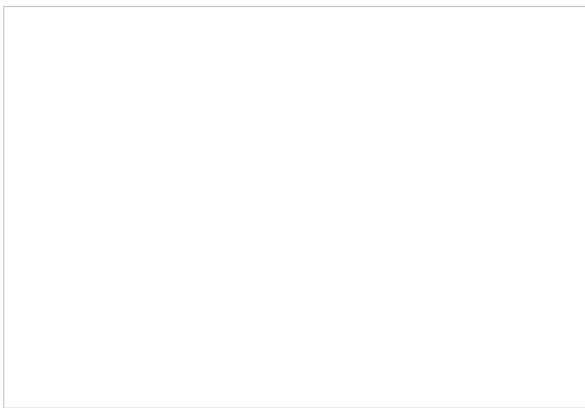
In addition to the general campaign view described in the previous section, you can define a custom metrics view for each campaign individually. To define a custom view for a particular campaign, first select this campaign in the general metrics view.

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



Individual campaign metrics view

To add new metrics, click the green **add metrics** symbol. 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.

- **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 **add metrics** symbol 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 **add metrics** symbol 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 **add metrics** sign for the same purpose.
- **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.

- **Restore default view** will return the shown metrics to the original presets.
- **Set view as default system-wide** allows you to set your customized metrics for a given campaign as the system default.

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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](#) or [All Real-Time Metrics](#) in the *Reporting Reference Guide*.

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

For definitions of these metrics, as well as a complete list of real-time metrics, see [List of All Real-Time Metrics](#) in the *Reporting Reference Guide*. The metrics here are listed in alphabetical order.

[ASR %](#)

[Attempted](#)

[Attempted %](#)

[Busy](#)

[Completed](#)

[Completed %](#)

[Dialable](#)

[Est Duration](#)

[Expired](#)

[IN Max Wait](#)

[Lists P. A. Completed](#)

[Lists P. A. Remaining](#)

[Logged In](#)

[Mode](#)

[Not Ready](#)

[OUT Abandoned](#)

[OUT Abandoned %](#)

[OUT Active](#)

[OUT Agent Disconnected](#)

[OUT Answered](#)

[OUT Answered %](#)

[OUT Avg Talk Time](#)

[OUT Call Rate](#)

[OUT Dialed](#)

[OUT Failed](#)

[OUT Handled](#)

[OUT IVR Abandoned](#)

[OUT IVR Abandoned %](#)

[OUT IVR Dropped](#)

[OUT in Progress](#)

[OUT Queue Abandoned](#)

[OUT Queue Abandoned %](#)

[OUT Queue Dropped](#)

[OUT Remote Disconnected](#)

[OUT Ringing Abandoned](#)

[OUT Ringing Dropped](#)

[OUT Routed](#)

[OUT Total Talk Time](#)

[OUT Transferred](#)

[OUT Unattended](#)

[Occupancy](#)

[Out of Quota](#)

[Ready](#)

[Total Completed](#)

[Total Completed %](#)

[Total DNC](#)

[Total Records](#)

[Total Remaining](#)

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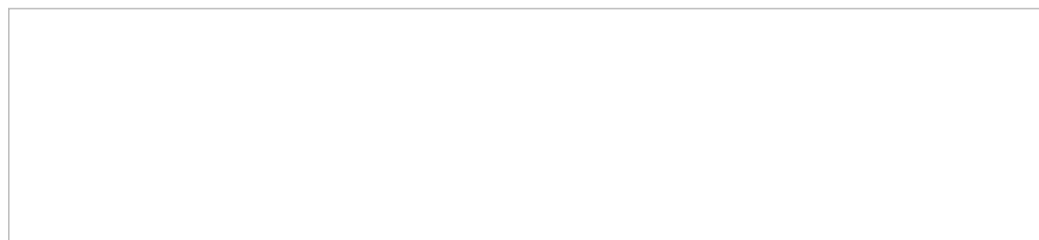
Quota Metrics View

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.

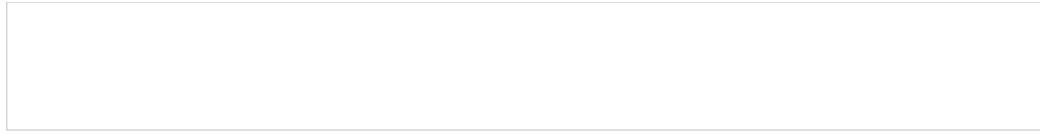
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List of Quota Metrics

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 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](#).



A view of quota metrics

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.

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 p.m. and stop at 6 p.m. If this campaign was started manually at 1:30 p.m., it will still be stopped automatically at 6 p.m. unless it is stopped manually before.

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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. Then, click the **down arrow** and select the desired "add" or "hide" options.

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).

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](#). For definitions of all real-time metrics, see [List of All Real-Time Metrics](#). Metrics here are arranged in alphabetical order.

Please note: 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

Attempted

Attempted is the number of records from a campaign where contact has been attempted, including the records that are currently being attempted. For campaign operations, this metric is only applicable to individual lists.

Attempted %

Attempted % is the percentage of records attempts during a campaign. This metric provides the percentage of attempted records relative to total records for the day. For campaign operations, this metric is only applicable to individual lists.

Completed

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

Completed %

Completed % is the percentage of completed records from a campaign for the day out of the sum of completed and remaining records for the day. For campaign operations, this metric is only applicable to individual lists.

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.

Lists 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.

Lists 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.

State chart

State chart is a bar graph displaying four types of counted records: auto, remaining, scheduled, and completed. Each of these counted records can be filtered in or out of the graph by clicking on the record name type. For campaign operations, this metric is only applicable to individual lists.

Order

Order defines the order (from low to high) in which lists will be used within a given service. For more information, see [List Order](#) in the *Contact Center Administrator Guide*.

Ratio

For lists with the same order, *Ratio* defines the ratio at which records from these lists will be used. For more information, see [Dialing Ratio](#) in the *Contact Center Administrator Guide*.

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.

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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.

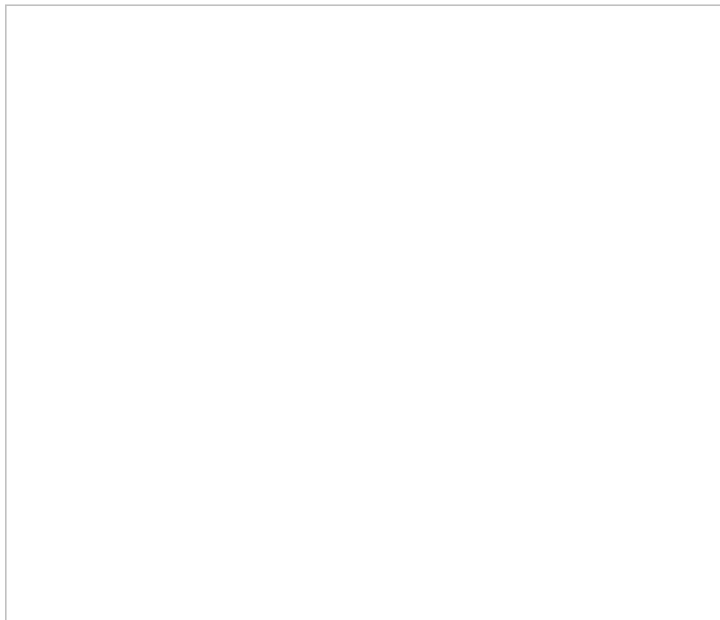
The order in which the system will start dialing records from this list relative to other active lists will be defined by the [Order](#) and [Ratio](#) settings.

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.



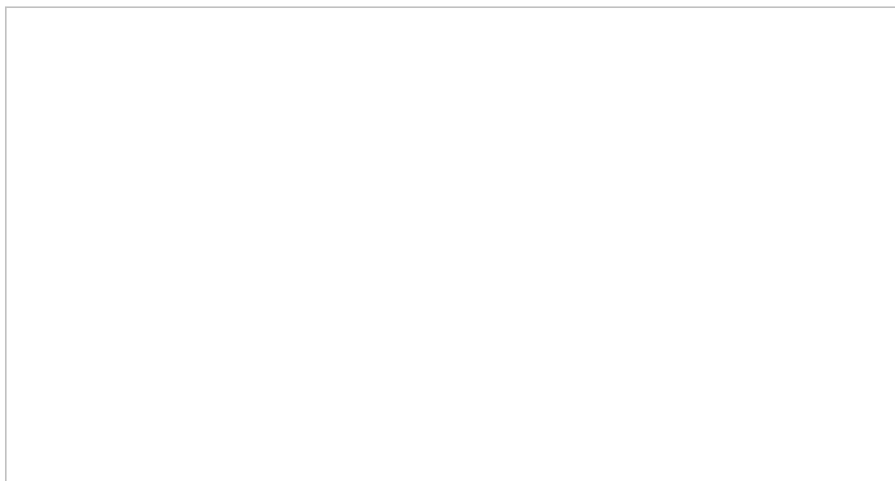
Location of the enable/disable button

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 Team 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.

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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 **add team** button at the bottom of the campaign teams view.
2. Select the desired team from the list that appears.
3. 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*.

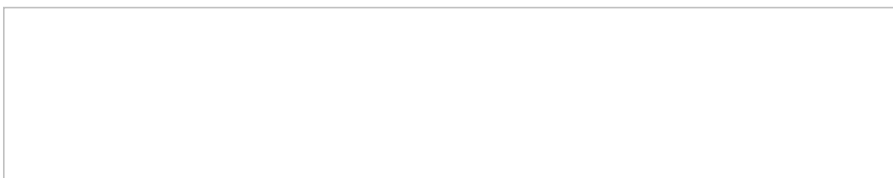


Adding a team to a selected campaign

To remove a previously assigned team:

1. Select this team in the campaign teams view.
2. Click the red **remove team** button .
3. A warning message will appear and you will need to confirm the removal of the team.
4. 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](#).



A warning message will appear before you remove a team from a campaign

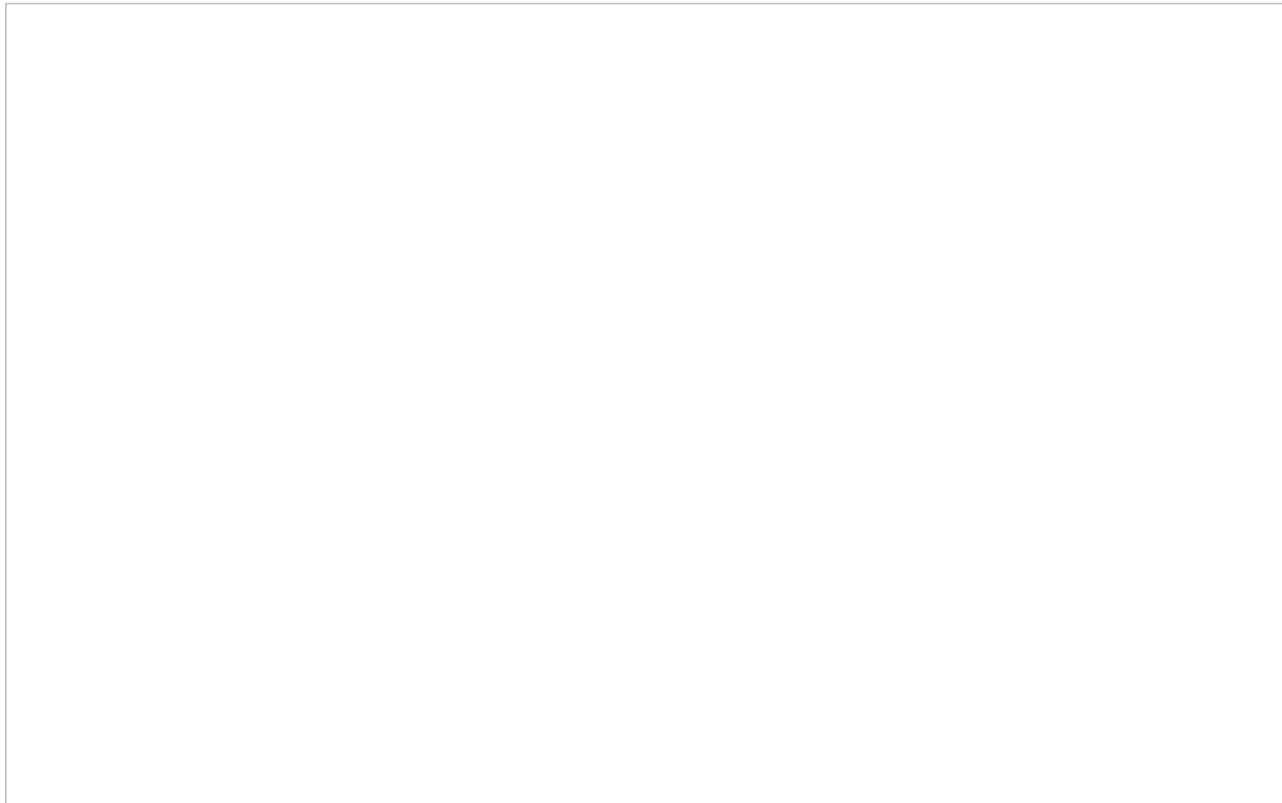
General Information About Email Queue Management

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*.

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 *Personal Queue*).

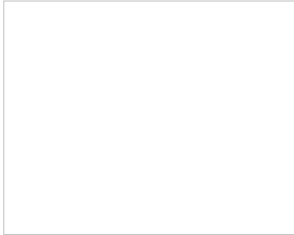


As a supervisor, you may review and assign agents emails from your Personal Queue

Managing Queues

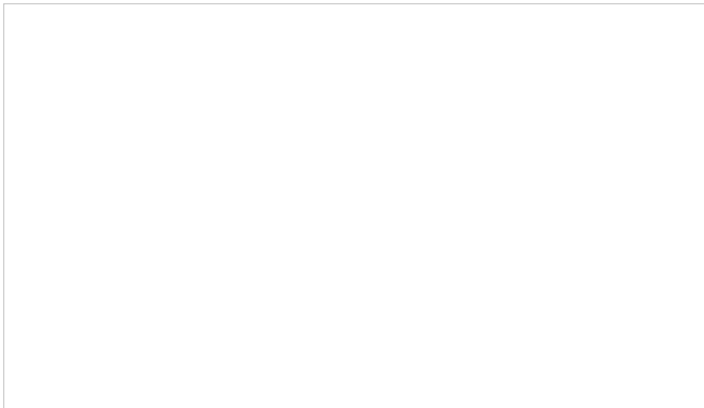
To manage your own *Personal Queue* and/or your *Team Queue*, select the **My Cases** entry. Your personal and team queues will be displayed in the *Contact Info Panel* area. You may have to drag the sizing panels up or down to view both queues at the same time.

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.



An example of SLA bar indicators

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.

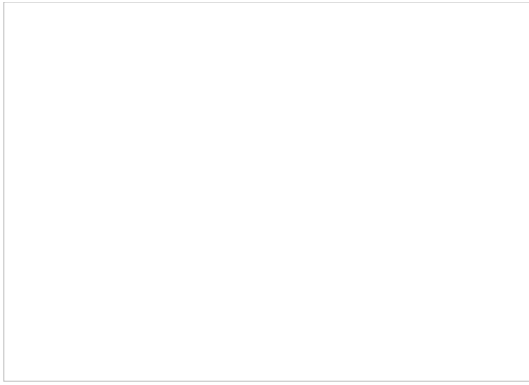


Switch between the services assigned to your team from the drop-down menu

You can sort emails in the team queue by the following:

- Create time
- Update time
- Last customer update
- SLA Age %
- From
- Subject
- Flag

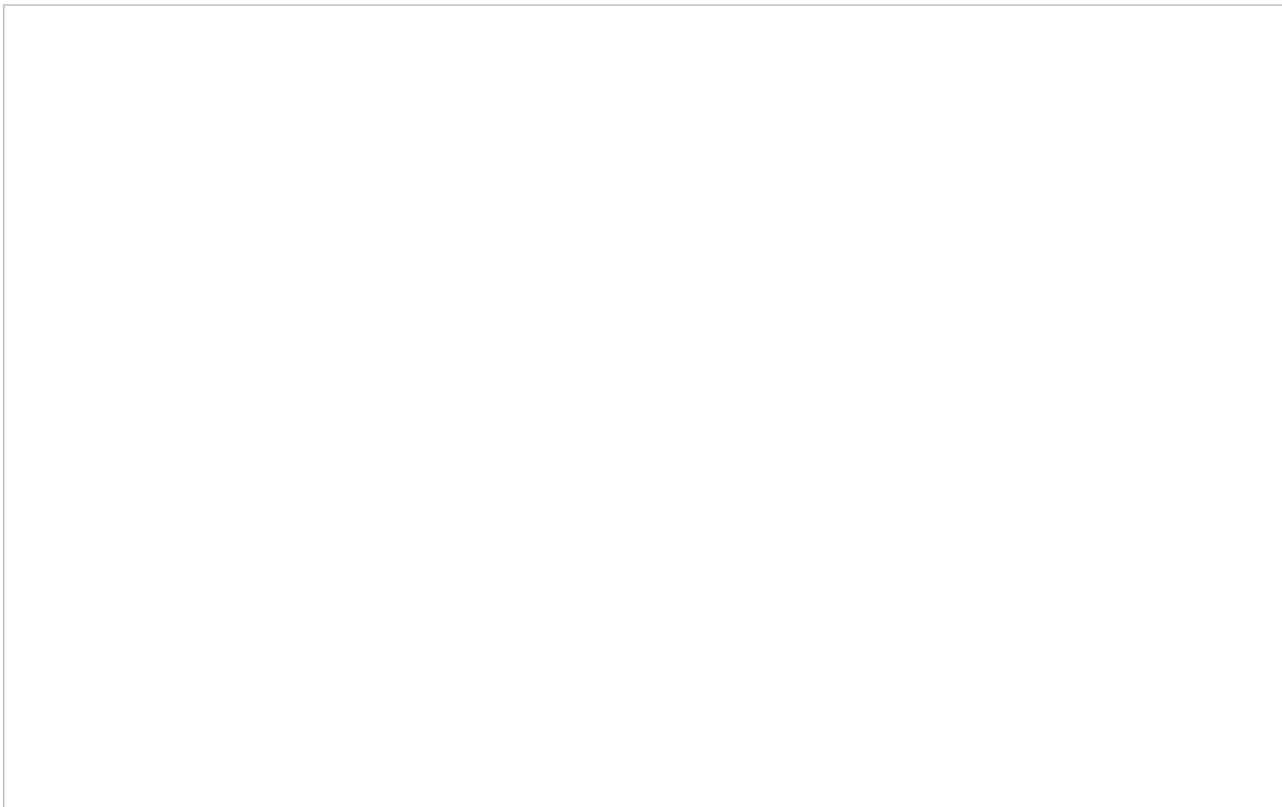
You may choose either ascending or descending order of email appearance in each case.



Email sorting options

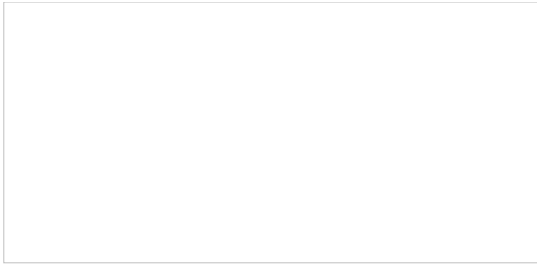
Reviewing and Assigning Emails

To review the contents of an email, click it once. The email will appear in the reading pane on the right side of the screen. 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](#).



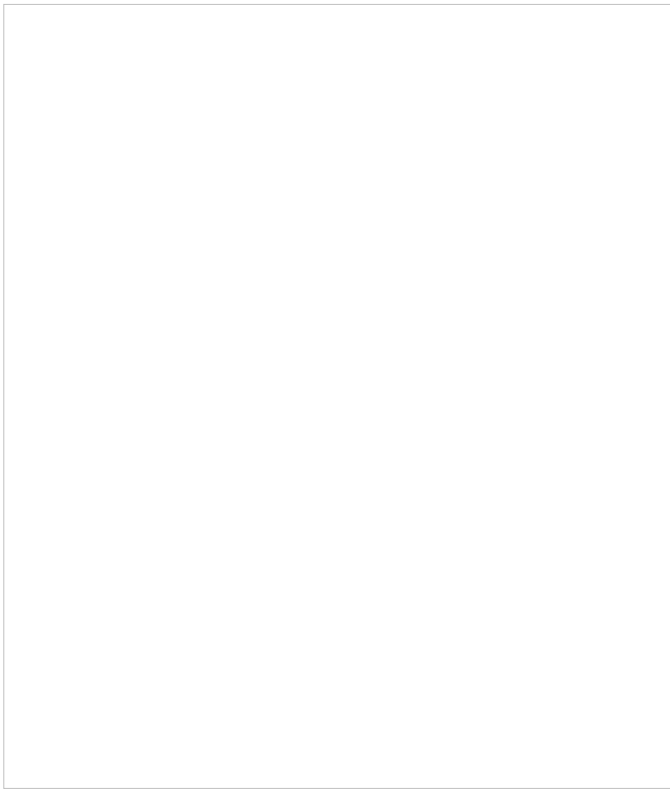
Search for the agent whose emails you want to review from your Personal Queue

To assign the selected email to a member of your team, select the checkbox next to the email then click the **Assign email to agent** button.



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 **Assign** to confirm the assignment, or click **Cancel** to close the dialog window.



Email assignment

The email will be moved to the agent's *Personal 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 [Personal 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 *Personal Queue*.

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 .

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.

If necessary, you can review the 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 *Agent Guide*, section [How to Review an Incoming Email](#).

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

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.