5.2 Wallboard Builder Reference Guide

Bright Pattern Documentation

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Purpose

The Bright Pattern Contact Center *Wallboard Builder Reference Guide* describes the elements of the Wallboard Builder application that are used for viewing and editing wallboards in the Agent Desktop application.

The Wallboard Builder application enables you to customize the look and display of your contact center's wallboard. Cards and cells can be added, deleted, scaled, and expanded using mouseovers, click-and-drag, and drag-and-drop movements. In Agent Desktop, wallboards are shown in either Edit mode or Display mode. Users with the privilege *Customize Wallboards* may edit a wallboard's layout.

Wallboard localization is supported in English, German, and Japanese.

For information about granting privileges for customizing, pushing, and pulling wallboards, refer to the[Contact Center Administrator Guide](#).

Viewing a customized wallboard

Audience

The Bright Pattern *Wallboard Builder Reference 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 must have the privilege of editing and sharing wallboard displays in your contact center. In addition, readers of this guide are expected to be familiar with basic operations with Internet applications.

Wallboard Builder Overview

A wallboard is displayed as a grid of 12 x 12 cells, containing cards; these cards display configurable widgets. A wallboard is shown in either View mode or Edit mode.

In View mode, widgets display real-time statistics and metrics for various services, teams, and agents. In Edit mode, the same widgets are displayed along with the control elements to edit, add, or remove them.

To switch between View and Edit mode, select the **Menu** icon in the upper right-hand corner and choose the desired option.

Editing a wallboard

Requirements

Users may edit a wallboard's layout when granted the privilege *Customize Wallboards*. Privileges are granted by system administrators of your contact center from the *Configuration* > *Users & Teams* > *Roles* > *Properties* section of the Contact Center Administrator application.

There are three privileges related to the wallboard application:

1. Access Real-time Stats API - When enabled, this privilege allows users to view created wallboards. Also, this privilege allows the wallboard icon to appear on the Agent Desktop home screen.
2. Customize Wallboards - This privilege allows users with access to wallboards to create and customize them.
3. Push/Pull Global Wallboards - This privilege allows users with access to wallboards Push/Pull functionality.

If you are not sure if you have the appropriate wallboard privileges, contact your system administrator.

View Mode

In *View* mode, the wallboard's *Grid*, *Settings*, and *Remove* icons are hidden from view, and no changes can be made to the wallboard itself.

The wallboard displays the following elements:

- Title with drop-down arrows for selecting which wallboard (i.e., personal or global) to view
- Menu
- Selection arrows for flipping between wallboards
- Cards that either contain pre-configured widgets or are empty

A wallboard in view mode

Title

The title is the identifying name of the wallboard, and it is shown at the top of the screen with a large font size. The title is important because it is what is displayed in the list of wallboards that may be selected. The more descriptive and specific the wallboard title is, the easier it is to select the desired one for the task at hand.

The title of the wallboard is shown at the top of the wallboard

The down arrow is used to select which wallboard to view. If no wallboards are defined, a default wallboard layout is shown in Edit mode.

Personal and saved global wallboards are listed

Menu

When clicked, the wallboard menu displays actions that may be taken for the selected wallboard.

These actions are described as follows:

- **New** allows you to create a new wallboard.
- **Edit** enables you to switch to Edit mode and make changes to the selected wallboard.
- **Duplicate** will make a copy of the selected wallboard, saving it to your list of personal wallboards.
- **Delete** will delete the selected wallboard.
- **Export** lets you export the selected wallboard as a JSON file.
- **Import** allows you to import a JSON wallboard file.
- **Push to global** enables you to share the selected wallboard with others in your contact center.
- **Pull from global** enables you to select and view the wallboards that are pushed to global.
- **Rotation** allows you to rotate between selected wallboards at an interval (in seconds).
- **Hide Title Bar** hides the title and menu bar from regular view unless moused over.
- **User Widgets** allows you to pull the user statistics of an individual user and apply them to all user widgets in a wallboard.

Wallboard menu actions

Note the following:

- Only personal wallboards can be renamed, deleted, or pushed to global.
- Only global wallboards can be pulled from global.
- The last global wallboard cannot be pulled.
- When duplicating a global wallboard, the duplicate appears in your list of personal wallboards.
- The *Export* and *Import* options can be used to move wallboards between different environments (e.g., move a wallboard that you prepared in a sandbox to your production environment).

Wallboard Selection Arrows

The arrows shown beside the wallboard menu are used for flipping between your personal wallboards and pulled global wallboards. Click the left and right arrows to navigate through your saved wallboards.

Wallboard selection arrows

To view a list of all of your saved wallboards, click the wallboard title's down arrow.

Cards

In View mode, the selected wallboard's cards (i.e., cells) are shown in whichever way they were created and saved. Cards display widgets with statistics, metrics, news or announcements, summary charts, and so forth. If cards have not been configured, they are shown empty.

For more information about cards and their contents, see section **Widgets**.

Wallboard cards/cells are shown

Switching Between View Mode and Edit Mode

The Settings icon appears upon mouseover only, and it is hidden when the cursor moves away from the icon. Clicking the Settings icon switches the Agent Desktop dashboard into Edit mode and opens the configuration dialog for the widget to be edited.

It is also possible to switch to Edit mode via the wallboard menu. Click the **Menu** icon and select **Edit**.

Automatic Screen Rotation

If you have created or have access to more than one wallboard, it is possible to rotate between them either manually or configure your system to do so automatically. For more information, please see Rotating Screens.

Edit Mode

Users with the privilege *Customize Wallboards* may edit a wallboard's layout. If you have been granted the privilege, your wallboards will be displayed in Edit mode with wallboard control elements visible. You can select and edit various parts of the wallboard by clicking or mousing over them.

For information about granting privileges for customizing, pushing, and pulling wallboards, refer to the Contact Center Administrator Guide.

A wallboard in edit mode

Cells

A wallboard is a grid of 12 x 12 cells, which contain information, stats, and metrics. When launching the Wallboard Builder application, if your wallboard has not been configured yet, you will see a grid of 12 cards and/or empty cells, as shown.

Dark-Wallboard-Grid-316.png

If you have the privilege to customize wallboards, the wallboard will be shown in Edit mode, and mousing over a card or cell will enable you to click to edit it. Clicking on any cell creates a new 2 x 2 card if there is space available. It is also possible to create a card by click-dragging across cells.

Note that the size of the card is a multiple of grid cells, and the minimum card size is 2 x 2.

There are two standard color schemes from which to choose: dark (black background and grey cards) and light (light grey background and white cards).

Cards

When mousing over an empty card, graphics for editing the card appear. At the center of each empty card is a “focus bracket” that shows where a card can be placed.

Wallboard focus bracket

When clicked, the plus sign graphic will show a widget selector that allows you to choose the type of widget to be placed in the card.

Select a Widget window

To delete the card and its contents, if any, click the Delete icon located in the upper right-hand corner of the card.

Resizing and Moving Cards

In addition to changing a card's contents, it is possible to change a card's size and placement on the grid.

To resize a card:

Click and drag the corner of the card until it is the desired size. Note that a resized card cannot overlap with another card on the grid.

To move a card:

Drag and drop it onto an empty space on the grid. As with a resized card, a dragged card can be dropped onto empty spaces only, and the cards cannot overlap.

Widget Selector

Widgets are used to display metrics, statistics, news, and other specific information in real-time on your wallboard. Widgets are added to cards on your wallboard using the widget selector. Mousing over a widget highlights it.

You can add a widget to a card by making a selection in the widget selector.

The widget selector groups widgets into three categories:

- Standard Widgets

- User Widgets
- Copy from Existing Widgets

Widgets from other wallboards are shown in the widget selector according to their configuration and titles.

To select a widget and add it to a card, click on a widget shown in the widget selector. A widget configuration screen will open, presenting widget-specific properties and settings to edit.

Cards that already have defined widgets will display a Delete icon, a Configure icon, and the title and actual data for the widget according to its configuration.

Scalable Display

When displayed, a wallboard scales to the all available space on the Agent Desktop. This means that cards do not keep their aspect ratio (e.g., it is impossible to ensure that cards are always square). Widget content is scaled according to the widget design.

The selector dialog can expand vertically to fit the Agent Desktop. If there are too many items in a section, a scroll bar appears.

Creating New Wallboards

If you have the privilege to edit wallboards, you are also enabled to create new wallboards.

Wallboards can be created either from scratch or from one of five out-of-the-box templates. Because templates are preformatted with widgets and a standard layout, they allow you to build standard wallboards and customize them quickly.

How to Create a New Wallboard

1. At the top of the page, click the **Menu** icon.
2. From the drop-down list that appears, select **New**.

Select "New" to create a new wallboard

.

3. In the *New Wallboard* dialog that appears, select the desired wallboard template.

Wallboard template selector

Templates

Templates are available to create the following types of prefab wallboards:

- Empty
- Outbound Campaigns
- Contact Center Overview
- Inbound Wallboard
- All Agents
- Email Wallboard

Empty

The *Empty* template is a blank wallboard that shows a grid of empty cards. No statistics are preconfigured. This wallboard is the type to select when creating a new wallboard from scratch, when you do not wish to use any other template available.

Empty wallboard

Outbound Campaigns

The *Outbound Campaigns* template contains statistics related to the outbound campaigns that your team is assigned to handle.

The following statistics are included:

- Abandoned %
- Agent State Summary
- Campaigns, which contains the following metrics:
  - Rec remaining
  - Calling Rate
  - In progress
  - Avg Dur
  - Succ%
  - Occ
- Occupancy
- Outbound Calling Rate
- Outbound Calls on Agents
- Outbound in Q Now
- Records Completed Today
- Top Agents by Avg Call Duration
- Top Break Time
- Top Successful Agents

Outbound Campaigns wallboard template

Contact Center Overview

The *Contact Center Overview* template presents a broad overview of your contact center's activities.

The following statistics are included:

- Abandoned, All Queues
- Agent State Summary
- All agents, which contains the following metrics:
  - State icon
  - Inbound handled
- Announcements
- Longest ACW, which contains the following metrics:
  - State icon
  - Inbound handled
- Longest Calls, which contains the following metrics:
  - State icon
- Longest Hold, which contains the following metrics:
  - Active item: hold duration
- Longest Not Ready, which contains the following metrics:
  - State duration
  - Not ready reason
- Positive Disposition Counts, which contains the following metrics:
  - Count of selected dispositions
- Queued, All Queues
  - Contains the secondary statistic Inbound abandoned in queue %
- Queues, which contains the following metrics:
  - Inbound Service Level Threshold

    - Inbound abandoned in queue
    - Inbound longest wait now
    - Inbound in queue now
    - Matching agents logged-in
    - Inbound received
- Waiting in All Queues

Contact Center Overview wallboard template

Inbound Wallboard

The *Inbound Wallboard* template contains statistics that are relevant to your team's inbound interactions.

The following statistics are included:

- Abandoned %
- ASA
- Busy Agents, which contains the following metrics:
    - Active item: service
    - State duration
    - Next state
    - Active item: talk duration
    - Active item: hold duration
- Callbacks in Queue
- Estimated Wait Time
- In IVR
- In Queue/Max Wait
- Longest Hold
- Service Queues, which contains the following metrics:
    - Inbound received

    - Inbound received as transfers
    - Inbound queued
    - Callbacks in queue now
    - Inbound abandoned %
    - Inbound short-abandoned in queue %
    - Inbound in IVR now
    - Inbound in queue now
    - Inbound longest wait now
    - Inbound duration average
    - Inbound handled by agents
    - In Svc L
    - Average speed of answer/reply
    - Avg ACW
    - EWT
- Top After Call Work
- Top Idle Time Agents
- Top Not Ready Agents

Inbound wallboard template

All Agents

The *All Agents* template presents a list view of selected agents from your team. To edit the preconfigured list of agent statistics, click the **Edit** icon at the top right of the wallboard template. This opens the*Select Grid Options* window, where you can select teams to show and sort/filter the agents in the list.

The following statistics are included:

- First Name Last Name

- State icon
- State duration
- [Break Timetotal]
- Active item:service
- Active item:media
- Active item:hold duration
- Active item:direction
- Active item:flagged
- Active item:talk duration
- Active item:state
- Inbound handled
- Inbound rejected or missed by agents
- Outbound interactions handled by agents (email - send non-replies)
- Next state
- Team name

All Agents wallboard template

Email Wallboard

The *Email Wallboard* template contains statistics that are relevant to your team's email queues.

The following statistics are included:

- Bottom Agents by Email Handled
- Email Carried Over
- Email Dispositioned wo Reply
- Email Handled
- Email in Personal Queues
- Email Replied

- Email Services, which contain the following metrics:
  - Inbound Service Level Threshold
  - Inbound Service Level Target
  - In SL
  - Inbound emails that created new cases
  - Inbound Email Carried Over
  - Inbound Emails in Personal Queues Now
  - Inbound Email Replied
  - Inbound Email Dispositioned Without Reply
- New Email
- Top Agents by Email Handled
- Top Break Time
- Top Personal Queues

Email wallboard template

Metrics

The Wallboard Builder utilizes real-time metrics to populate the widgets. Real-time metrics pull data from various areas in Agent Desktop and are constantly updated in real-time (every few seconds) to reflect the current status of your contact center operations.

For a complete list of these statistics including definitions, see All Real-time Metrics in the *Reporting Reference Guide*. Real-time metrics names often have several variations depending on where they appear in Agent Desktop; the Wallboard names will be listed under the main real-time metric name. Information About Real-time Metrics, also located in the *Reporting Reference Guide*, provides general details about how these metrics function.

There are many metrics to populate widgets with

Global Wallboards

Wallboards can be created and saved locally to your Agent Desktop as personal wallboards, or they can be created and exported to a global pool for everyone in your contact center to access.

Both global wallboards and personal wallboards are listed by title in a drop-down list at the upper left-hand corner of the screen. To access it, click the down icon beside the current wallboard's title.

Select a wallboard from the list

Push/Pull Functionality

The capability to push personal wallboards to a global scope or pull global wallboards and keep them as personal, is enabled via a privilege set by your system administrator. For more information on the privilege *Push/Pull Global Wallboards*, see the *Contact Center Administrator Guide*, section Privileges.

Note that only personal wallboards can be renamed, deleted, or pushed to global, and only global wallboards can be pulled from global. When duplicating a global wallboard, the duplicate appears in your list of personal wallboards.

How to Push to Global

To push a wallboard to global, follow these steps:

1. Click the wallboard selection arrow beside the wallboard title and select the name of the desired personal wallboard to share. The personal wallboard will be displayed.
   Select-Personal-316.png
2. Navigate to the Wallboard menu at the upper right-hand part of the screen.

3. Click the menu icon .
4. Select **Push to global**. Note that if you do not have the privilege *Push/Pull Global Wallboards*, the menu will not display the option to push or pull global wallboards.

   Wallboards are pushed from personal to global via the Menu

The wallboard is then removed from your personal wallboards and placed in global wallboards.

Pushed Wallboards are removed from personal and placed in global wallboards

How to Pull from Global

To pull a wallboard from global, follow these steps:

1. Click the wallboard selection arrow beside the wallboard title and select the name of the desired global wallboard to get. The global wallboard will be displayed.

Select-Global-316.png

2. Navigate to the Wallboard menu at the upper right-hand part of the screen.
3. Click the menu icon .
4. Select **Pull from global**. Note that if you do not have the privilege *Push/Pull Global Wallboards*, the menu will not display the option to push or pull global wallboards.

   Wallboards are pulled from global via the Menu

The wallboard is then pulled from global wallboards and placed in your personal wallboards, as shown.

Pulled wallboards are placed in your personal wallboards

Supervisor Usage

Supervisors with the privilege *Customize Wallboards* and *Push/Pull Global Wallboards* can create wallboards to be used by their assigned teams. This capability allows agents on the same teams to view the same metrics, statistics, and information. After creating custom wallboards, supervisors can push the wallboards to global, and agents can pull the wallboard from global to appear on their Agent Desktop home screens.

For more information on customization, see section Customizing Wallboard Styles.

Upon opening the Wallboard Builder application, both agents and supervisors will see (in View mode) the last wallboard they viewed during their previous login session. If no wallboards were viewed, any of the global wallboards available will be shown instead.

To view the desired global wallboard (if it is not displayed already) agents must click the down arrow beside the wallboard title and select the desired global wallboard from the list.

Rotating Screens

If you have created or have access to more than one wallboard, it is possible to rotate between them either manually or configure your system to do so automatically.

Manual Screen Rotation

To manually rotate between wallboard screens, use either the **Wallboard selector** for selecting a personal or global wallboard or the **Navigation arrows** for flipping from one wallboard to the next.

Automatic Screen Rotation

To enable wallboard screens to automatically rotate, take the following steps:

1. Click the **menu** button
2. Select **Rotation**
3. Select the **Enabled** checkbox
4. Select which wallboards you would like included in the rotation
5. Enter the interval (in seconds) that you would like your screens to rotate at
6. Click **OK**

To disable automatic screen rotation, simply return to the **Rotation** menu option and uncheck the **Enabled** box.

Wallboard rotation settings

Customizing Wallboard Styles

Users with the privilege *Customize Wallboards* can change the theme of their personal wallboards, choosing from the light or black themes that are available out-of-the-box. Note that only personal wallboards and global wallboards pulled and saved to your personal wallboards section may be edited.

To change the theme, click the located at the top of your wallboard screen. The theme selector will display the available options.

Light theme

Black theme

Alerts

Alert conditions are defined for each statistic in the Single Statistic settings. See section Single Stat for more information.

Single Statistic settings

When an alert condition is triggered, the Single Statistic changes its background, font, and border colors, and it plays the alert sound (if defined) and periodically (if specified). See section Customizing Wallboard Styles for more information.

Title and Controls

In View mode, the following fields and controls are always shown:

- **Title and menu bar**
- **Wallboard selector** for selecting a personal or global wallboard
- **Navigation arrows** for flipping from one wallboard to the next
- **Menu icon** for working with wallboards

Wallboard title, controls, and Menu

A user with a privilege *Customize Wallboards* has additional elements that appear on the wallboard while in Edit mode:

- **Title field** for changing the name of the wallboard
- **Theme selector** for selecting a light or dark theme
- **Save** button for applying changes when in Edit mode

Wallboard controls are shown while in Edit mode

Hide Title Bar

An option in the menu called *Hide Title Bar* controls the title and controls display in View mode. If the*Hide Title Bar* option is enabled, it is hidden until the user’s mouse hovers over the border area over the top row of cards (i.e., spaces on the wallboard). When *Hide Title Bar* is disabled, the title reappears, shifting the content down on the display. Once the mouse has left the title area, the title disappears, shifting the content up.

Wallboard view with *Hide Title Bar* enabled

Hide Title Bar enabled - "mouse over" view

About Standard Widgets

Standard widgets contain data relating to the general performance of your contact center and your team. Also included are widgets that allow team communication, such as chat messages, calendar items, and images.

An example wallboard containing all standard widgets

Selection of Widgets

The following is a list of standard widgets you may add to the cards in your wallboard. To learn more about these widgets, select from the following links:

- Agent Grid
- Agent State Summary
- Gauge
- News
- Service Grid
- Single Statistic
- Text
- Time
- Image

To add a standard widget to your wallboard, you must be in *Edit* mode. Click inside an empty card or draw a card on an empty wallboard spot; both actions will bring up the widget selector. Click on the widget type you want, configure its settings, and it will populate the card.

Standard widget selector

Agent Grid

The Agent Grid widget provides information about a specified selection of agents on a team. Real-time metrics shown on this widget can help supervisors and agents understand team performance, view the status of other agents (e.g., *Ready* or *Not Ready*), and more.

The grid shows the following information about agents:

- Agent first and last name
- State
- The duration in state (except for *Ready*, where idle time is shown instead)

Settings

Users with the privilege *Customize Wallboards* may edit the control settings of wallboard widgets.

Settings for the Agent Grid widget

Title

Title is the title of the widget. Widget titles, along with their icons, are displayed in the widget selector.

Show only

You can select the teams or states to be shown on the widget. Choose from*selected teams* or *selected states*.

If *selected states* is chosen, a dialog will open with the available states that can be selected. You may also limit the agents shown to only agents on your subteams. This is done by selecting the **Limit to** checkbox for **my subteam only**.

Selected teams are chosen in the same way. Note that teams not assigned to the editing user will not be displayed or included in calculation. The display is limited to the editing user's assigned teams.

Select Agents by State

Column headings

Selecting the **enable** checkbox enables the column headings to be shown on the widget.

Max items to show

Enter the maximum number of items to be shown on the widget.

Columns

Agent names and metrics are displayed in *Columns*. Note that *first+last* is a formula field.

Order

You can specify the *order* (i.e., 1, 2, 3) in which agents and their metrics are displayed in the widget. Note that you may sort the list of agents to show how many agents are ahead of you to accept an interaction.

Statistic

Statistic is the name of the statistic that will be shown on the widget.

Sort

Sort will sort the agents and agent statistics listed in the widget. Note that you may sort the list of agents to show how many agents are ahead of you to accept an interaction.

Column title

In the Columns section of the widget settings, the *Title* field allows you to rename the statistic's title.

Control Options

In the Settings dialog window shown, notice the control options. These are used to select, sort, delete, and move items in and out of the widget's columns.

- The "plus" icon is used to add more statistics to a column.

- The "X" is used to delete a statistic from a column.
- The sort circle means there is no sorting, and it appears only on hover.
- The sort up arrow is used to move a statistic up the list.
- The sort down arrow is used to move a statistic down the list.

Note the following:

- When column headings are disabled, the *Title* column is hidden.
- When multiple sort options are selected, they are evaluated in the order that columns are defined.

Agents Ahead of Me

The *Sort* settings of the Agent Grid widget can be modified so that agents can see if there are any other agents in front for them for receiving the next call. The Agent Grid widget will list the top 10 agents from all teams, which are sorted by status and metrics in the following order:

- Idle time, descending
- Wrap Up time, descending
- Not Ready time, descending
- Busy time descending

Logged-in agents who have this widget on their wallboards will see their names highlighted in the list. If there are no logged-in agents, the widget shows nothing and “No agents logged in."

In the example shown, the Agent Grid's title has been changed to "Agents in Front of Me" and the widget shows the agents' first and last name, state, and the duration in state or idle time (i.e., the time since login or the last interaction).

Ten agents from all teams are listed with their names, states, and duration in state

Statistics

For the Agent Grid widget, the following real-time statistics and user properties may be selected.

Active Item: Direction

Active Item: Direction indicates whether the service for the interaction the agent is currently handling is inbound or outbound.

Active Item: Flagged

Active Item: Flagged indicates if the interaction the agent is currently handling is flagged.

Active Item: Hold Duration

Active Item: Hold Duration displays the current amount of time a customer has spent on hold for the interaction the agent is currently handling.

Active Item: Media

Active Item: Media is the media type (e.g., voice, chat, email) of the interaction that the agent is currently handling.

Active Item: Monitor Mode

For supervisors, *Active Item: Monitor Mode* indicates what monitor mode they are in.

Active Item: Party Name

Active Item: Party Name is the name of the customer from the interaction the agent is currently handling.

Active Item: Sentiment

Active Item: Sentiment is the sentiment score of the interaction the agent is currently handling. The score indicates how negative or positive the current interaction is, based on sentiment analysis. A score value below -0.05 is considered negative and a value above 0.05 is considered positive. A value in between -0.05 and 0.05 is considered neutral.

Active Item: Service

Active Item: Service is the service of the interaction that the agent is currently handling.

Active Item: State

Active Item: State is the agent's state in the interaction that the agent is currently handling.

Active Item: Talk Duration

Active Item: Talk Duration is the time an agent has spent talking on the current call (i.e., the time from the moment the call was answered minus any hold time). For chat sessions, this metric represents current chat session duration during which this chat session was shown to the agent (i.e., was selected in Active Communication List). If the agent is handling several chat sessions concurrently, only one selected session at a time is counted

Average Handle Time

Average Idle Time

Average Preview Duration

Break Time

Calendar Events

Calendar Events Overdue

Count of Selected Dispositions

Count of Selected Dispositions %

Custom Survey Metric 1

Custom Survey Metric 2

Customer Satisfaction

Extension

Extension is the agent's extension number.

First Call Resolution

First Name Last Name

First Name Last Name is the agent's first name followed by the last name.

Inbound duration average

Inbound duration total

Inbound emails dispositioned without reply

Inbound emails handled

Inbound emails in personal queues now

Inbound emails offered

Inbound emails pulled by agent

Inbound emails replied

Inbound emails unanswered

Inbound handled

Inbound handled now

Inbound held

Inbound held, non-transferred

Inbound rejected or missed by agents

Inbound released by agents

Inbound transferred away

Inbound transfers received

Last Name First Name

Last Name First Name is the agent's last name followed by the first name.

Login duration

Login duration is the total amount of time an agent has been logged in to their current Agent Desktop session.

Net Promoter Score

Next Not Ready State

Next Not Ready State indicates what an agent's next *Not Ready* state will be. For more information about agent state, see How to Interpret Your Current State Information in the Agent Guide.

Next State

Next State indicates what an agent's next state will be, e.g. *Break*, *Lunch*, etc.

Not Ready Reason

This statistic presents the reason for an agent not being ready to handle interactions.

For more information on agent states and *Not Ready* reasons, see the Agent Guide, section How to Interpret Your Current State Information.

Number of interactions recategorized to a different service

Number of nonreplies started and discarded by agents

Occupancy

Outbound calls duration average

Outbound calls duration total

Outbound calls rejected or missed by agents

Outbound emails in personal queue

Outbound interactions handled by agents (email - send non-replies)

Preview duration now

Records previews

Records skips

Records skips %

State

State is the name of the agent state, such as *Logged out*, *Not Ready*, *ACW*, *Ready*, and *Busy*.

State duration

State duration is the amount of time the agent has been in a current state.

State icon

This field is the icon associated with the agent state, such as the icons for *Logged out*, *Not Ready*, *ACW*, *Ready*, and *Busy*.

Success rate

Team Name

Team Name is the name of the agent's team.

Total contacts

Total contacts is the total amount of contacts for a given campaign.

Agent State Summary

The Agent State Summary chart widget displays agent state metrics in the form of a pie chart, for at-a-glance viewing.

Agent State Summary

Settings

Users with the privilege *Customize Wallboards* may edit the control settings of wallboard widgets. Agent State Summary settings are as follows.

Agent State Summary Chart settings

Title

Title is the title of the widget. Widget titles, along with their icons, are displayed in the widget selector.

Show only

Select the **Show only** checkbox in order to choose and display selected teams on the widget. To choose the teams, click **selected teams**.

Select Teams

The *Select Teams* window allows you to include teams on the widget. Select the desired teams on the left-hand side of the dialog, and use the arrow buttons to move them to the right-hand side of the dialog.

Agent States

Agent States may be selected to be included in the Agent State Summary Chart. Such states include *ACW*, *Not Ready*, and more.

Gauge

Gauge is a display type for a single statistic widget. On a Gauge widget, information is presented in a meter-like (i.e., gauge-like display) for one statistic or metric only. You may add a standalone Gauge widget to your wallboard, or you may enable gauge display for any other type of primary single statistic on your wallboard.

Gauge widget

Settings

Gauge Settings

Users with the privilege *Customize Wallboards* may edit the control settings of wallboard widgets. Gauge settings are as follows.

Title

Title is the name of the statistic widget. Widget titles, along with their icons, are displayed in the widget selector.

Primary Statistic

The *Primary Statistic* is the main single statistic to be shown in the widget.

The drop-down menu provides the following single statistics from which to choose:

- Agents busy with this service
- Agents in ACW state
- Average idle time of matching agents
- Average preview time of matching agents
- Average speed of answer/reply
- Callback attempts failed
- Callbacks abandoned during setup
- Callbacks attempts connected
- Callbacks canceled
- Callbacks in queue now
- Callbacks requested
- Callbacks scheduled
- Completed records in active lists
- Completed records with personal agent assignments
- Count of records in all active lists
- Count of selected dispositions
- Custom Survey Metric 1
- Custom Survey Metric 2
- Customer Satisfaction
- Estimated campaign duration
- Estimated wait time
- First Call Resolution
- Inbound abandoned
- Inbound abandoned %
- Inbound abandoned in IVR
- Inbound abandoned in queue
- Inbound abandoned in queue %
- Inbound abandoned while ringing
- Inbound dropped by system in IVR
- Inbound dropped by system in queue
- Inbound dropped by system while ringing
- Inbound duration average
- Inbound duration total
- Inbound emails carried over
- Inbound emails dispositioned without reply
- Inbound emails for existing queued cases
- Inbound emails handled
- Inbound emails in personal queues now
- Inbound emails not accepted

- Inbound emails that created new cases
- Inbound handled by agents
- Inbound handled by agents %
- Inbound handled by agents now
- Inbound in IVR now
- Inbound in IVR, queue or on agents now
- Inbound interactions answered in Service Level % (moving window)
- Inbound longest wait now
- Inbound queued
- Inbound received as transfers
- Inbound rejected or missed by agents
- Inbound released by agents
- Inbound released by callers
- Inbound routed to agents
- Inbound self serviced
- Inbound Service Level target
- Inbound Service Level threshold
- Inbound short-abandoned in queue
- Inbound short-abandoned in queue %
- Inbound transferred away
- IN Svc Level Day %
- Matching agents busy
- Matching agents logged-in
- Matching agents not ready
- Matching agents ready
- Net Promoter Score
- Number of interactions recategorized from a different service
- Number of interactions recategorized to a different service
- Number of nonreplies started and discarded by agents
- Number of records excluded by DNC lists from active Lists
- Occupancy of matching agents
- Outbound call attempts
- Outbound call attempts in progress now
- Outbound calling rate now
- Outbound calls abandoned
- Outbound calls abandoned %
- Outbound calls abandoned in IVR
- Outbound calls abandoned in IVR %
- Outbound calls abandoned in queue
- Outbound calls abandoned in queue %
- Outbound calls abandoned while ringing
- Outbound calls answered, out of connection speed compliance
- Outbound calls answered, out of connection speed compliance %
- Outbound calls attempts successful
- Outbound calls attempts successful %
- Outbound calls attempts failed
- Outbound calls dropped in IVR
- Outbound calls dropped in queue
- Outbound calls dropped while ringing
- Outbound calls duration average
- Outbound calls duration total
- Outbound calls in IVR %

- Outbound calls in queue now
- Outbound calls queue
- Outbound calls rejected or missed by agents
- Outbound calls released by agent
- Outbound calls released by remote party
- Outbound calls ringing on agents now
- Outbound calls routed to agents
- Outbound calls self serviced
- Outbound calls transferred away
- Outbound interactions handled by agents (email - send non-replies)
- Outbound interactions handled by agents now
- Records attempts
- Records attempts %
- Records completed in active lists %
- Records completions
- Records completions %
- Records in quota groups that reached quota limits
- Records previews
- Records skips
- Records skips %
- Remaining records in active lists
- Remaining records with personal agent assignments
- Selected Dispositions Percentage

services

Clicking the **services** link allows you to select and add the available services that are associated with the single statistic.

enable warning sound

Selecting the *enable warning sound* checkbox enables the Agent Desktop to play a warning sound whenever service level thresholds are exceeded for the given statistic or metric.

enable gauge display

Selecting the *enable gauge display* checkbox will cause the widget to change its appearance when certain thresholds are exceeded (see below).

When gauge display is enabled, the following values may be defined:

- **warning threshold** - Causes the gauge to change color when exceeded
- **alert threshold** - Plays a warning sound when exceeded
- **max threshold** - The most that can be displayed

Note: Deselecting the *enable gauge display* checkbox will cause the Secondary Statistic field to appear, allowing you to add a second statistic to the widget.

News

This widget is reserved for future use.

News widget settings

Service Grid

The Service Grid widget provides information about a specified selection of services.

Settings

Users with the privilege *Customize Wallboards* may edit the control settings of wallboard widgets. Service Grid settings are as follows.

Service Grid control settings

Title

Title is the title of the widget. Widget titles, along with their icons, are displayed in the widget selector.

Show only

You can select the *selected dispositions* or *selected services* to be shown on the widget. If *selected dispositions* is chosen, a dialog will open with the available dispositions that can be included for the service.

Selected services are included in the widget in the same way. Selected services also may be called from any single service statistic. Note that services not assigned to the editing user will not be displayed or included in calculation. The display is limited to the editing user’s assigned services.

Select dispositions for a service by clicking the left and
right arrows

Column headings

Selecting the **enable** checkbox enables the column headings to be shown on the widget.

Max items to show

Enter the maximum number of items to be shown on the widget.

Columns

Service metrics are displayed in *Columns*. You can specify the information to be shown in each column.

Order

Order affects the order in which service metrics are displayed in the widget.

Sort

Sort will sort the services and metrics listed in the widget.

Title

The *Title* field allows you to rename the Service Grid columns.

Statistic

For the Service Grid widget, the following service metrics may be selected.

For more information on service metrics, see the *Reporting Reference Guide*, section Service Metrics Report.

Agents busy with this service

Agents in ACW state

Average idle time of matching agents

Average preview time of matching agents

Average speed of answer/reply

Callback attempts failed

Callbacks abandoned during setup

Callbacks attempts connected

Callbacks canceled

Callbacks in queue now

Callbacks requested

Callbacks scheduled

Completed records in active lists

Completed records with personal agent assignments

Count of records in all active lists

Count of selected dispositions

Count of selected dispositions %

Custom Survey Metric 1

Custom Survey Metric 2

Customer Satisfaction

Estimated campaign duration

Estimated wait time

First Call Resolution

Inbound abandoned

Inbound abandoned %

Inbound abandoned in IVR

Inbound abandoned in queue

Inbound abandoned in queue %

Inbound abandoned while ringing

Inbound dropped by system in IVR

Inbound dropped by system in queue

Inbound dropped by system while ringing

Inbound duration average

Inbound duration total

Inbound emails carried over

Inbound emails carried over from previous day

Inbound emails dispositioned without reply

Inbound emails for existing queued cases

Inbound emails handled

Inbound emails in personal queues now

Inbound emails not accepted

Inbound emails replied

Inbound emails that created new cases

Inbound handled by agents

Inbound handled by agents %

Inbound handled by agents now

Inbound in IVR now

Inbound in IVR, queue or on agents now

Inbound in queue now

Inbound interactions answered in Service Level % (moving window)

Inbound longest wait now

Inbound queued

Inbound received

Inbound received as transfers

Inbound rejected or missed by agents

Inbound released by agents

Inbound released by callers

Inbound ringing on agents now

Inbound routed to agents

Inbound self serviced

Inbound Service Level target

Inbound Service Level threshold

Inbound short-abandoned in queue

Inbound short-abandoned in queue %

Inbound transferred away

Matching agents busy

Matching agents logged-in

Matching agents not ready

Matching agents ready

Net Promoter Score

Number of interactions recategorized from a different service

Number of nonreplies started and discarded by agents

Number of records excluded by DNC lists from active Lists

Occupancy of matching agents

Outbound call attempts

Outbound call attempts in progress now

Outbound calls abandoned

Outbound calls abandoned %

Outbound calls abandoned in IVR

Outbound calls abandoned in queue

Outbound calls abandoned in queue %

Outbound calls abandoned while ringing

Outbound calls answered, out of connection speed compliance

Outbound calls answered, out of connection speed compliance %

Outbound calls attempts successful

Outbound calls attempts successful %

Outbound calls attempts failed

Outbound calls dropped in IVR

Outbound calls dropped in queue

[Outbound calls dropped while ringing]

[Outbound calls duration average]

[Outbound calls duration total]

[Outbound calls in IVR %]

[Outbound calls in queue now]

[Outbound calls rejected or missed by agents]

[Outbound calls released by agent]

[Outbound calls ringing on agents now]

[Outbound calls routed to agents]

[Outbound calls self serviced]

[Outbound calls transferred away]

[Outbound interactions handled by agents (email - send non-replies)]

[Outbound interactions handled by agents now]

[Records attempts]

[Records attempts %]

[Records completed in active lists %]

[Records completions]

[Records completions %]

[Records dialable right now (Dialable)]

[Records in quota groups that reached quota limits]

[Records previews]

[Records skips]

[Records skips %]

[Remaining records in active lists]

[Remaining records with personal agent assignments]

Service Name

Service Name is the name of the service.

Control Options

In the Settings dialog window, notice the control options. These are used to select, sort, delete, and move items in and out of the widget's columns.

- The "plus" icon is used to add more statistics to a column.
- The "X" is used to delete a statistic from a column.
- The sort circle means there is no sorting, and it appears only on hover.
- The sort up arrow is used to move a statistic up the list.
- The sort down arrow is used to move a statistic down the list.

Note the following:

- When column headings are disabled, the *Title* column is hidden.
- When multiple sort options are selected, they are evaluated in the order that columns are defined.
- Options show up on hover when options available for a specific statistic, or when there are non-default options for Service grid “selected services” instead of teams and states.

Single Statistic

The Single Statistic widget presents one type of statistic or metric for a given service interaction.

Settings

Single Statistic settings

Users with the privilege *Customize Wallboards* may edit the control settings of wallboard widgets. Single Statistic settings are as follows.

Title

Title is the name of the statistic widget. Widget titles, along with their icons, are displayed in the widget selector.

Primary Statistic

The *Primary Statistic* is the main single statistic to be shown in the widget.

The drop-down menu provides the following single statistics from which to choose:

Agents busy with this service

Average idle time of matching agents

Average preview time of matching agents

Break time total

Callback attempts failed

Callbacks abandoned during setup

Callbacks attempts connected

Callbacks canceled

Callbacks in queue now

Callbacks requested

Callbacks scheduled

Completed records in active lists

Completed records with personal agent assignments

Count of records in all active lists

Custom Survey Metric 1

Custom Survey Metric 2

Customer Satisfaction

Estimated campaign duration

Estimated wait time

First Call Resolution

Inbound abandoned

Inbound abandoned %

Inbound abandoned in IVR

Inbound abandoned in queue

Inbound abandoned in queue %

Inbound abandoned while ringing

Inbound dropped by system in IVR

Inbound dropped by system in queue

Inbound dropped by system while ringing

Inbound duration average

Inbound duration total

Inbound emails carried over

Inbound emails carried over from previous day

Inbound emails dispositioned without reply

Inbound emails for existing queued cases

Inbound emails handled

Inbound emails in personal queues now

Inbound emails not accepted

Inbound emails pulled by agent

Inbound emails replied

Inbound emails that created new cases

Inbound handled by agents

Inbound handled by agents %

Inbound handled by agents now

Inbound held

Inbound held, non-transferred

Inbound in IVR now

Inbound in queue now

Inbound interactions answered in Service Level % (moving window)

Inbound longest wait now

Inbound queued

Inbound received

Inbound received as transfers

Inbound rejected or missed by agents

Inbound released by agents

Inbound released by callers

Inbound ringing on agents now

Inbound routed to agents

Inbound self serviced

Inbound Service Level target

Inbound Service Level threshold

Inbound short-abandoned in queue

Inbound short-abandoned in queue %

Inbound transferred away

Matching agents busy

Matching agents logged-in

Matching agents not ready

Matching agents ready

Net Promoter Score

Number of interactions recategorized from a different service

Number of interactions recategorized to a different service

Number of nonreplies started and discarded by agents

Number of records excluded by DNC lists from active Lists

Occupancy of matching agents

Outbound call attempts

Outbound call attempts in progress now

Outbound calling rate now

Outbound calls abandoned

Outbound calls abandoned %

Outbound calls abandoned in IVR

Outbound calls abandoned in IVR %

Outbound calls abandoned in queue

Outbound calls abandoned in queue %

Outbound calls abandoned while ringing

Outbound calls answered, out of connection speed compliance

Outbound calls answered, out of connection speed compliance %

Outbound calls attempts failed

Outbound calls attempts successful

Outbound calls attempts successful %

Outbound calls dropped in IVR

Outbound calls dropped in queue

Outbound calls dropped while ringing

Outbound calls duration average

Outbound calls duration total

Outbound calls in IVR %

Outbound calls in queue now

Outbound calls queue

Outbound calls rejected or missed by agents

Outbound calls released by agent

Outbound calls released by remote party

Outbound calls ringing on agents now

Outbound calls routed to agents

Outbound calls self serviced

Outbound calls transferred away

Outbound emails in personal queue

Outbound interactions handled by agents (email - send non-replies)

Outbound interactions handled by agents now

Preview duration now

Records attempts

Records attempts %

Records completed in active lists %

Records completions

Records completions %

Records Dialable Right Now (Dialable)

[Records in quota groups that reached quota limits]

[Records previews]

[Records skips]

[Records skips %]

[Remaining records in active lists]

[Remaining records with personal agent assignments]

[Success rate]

services

Clicking the **services** link allows you to select and add the available services that are associated with the single statistic.

enable warning sound

Selecting the *enable warning sound* checkbox enables the Agent Desktop to play a warning sound whenever service level thresholds are exceeded for the given statistic or metric.

enable gauge display

Selecting the *enable gauge display* checkbox will cause the widget to change its appearance when certain thresholds are exceeded (see below).

When gauge display is enabled, the following values may be defined:

- **warning threshold** - Causes the gauge to change color when exceeded
- **alert threshold** - Plays a warning sound when exceeded
- **max threshold** - The most that can be displayed

Note: Deselecting the *enable gauge display* checkbox will cause the Secondary Statistic field to appear, allowing you to add a second statistic to the widget.

Gauge Display for Single Statistic widget

Secondary Statistic

The *Secondary Statistic* is a second statistic to be included in the widget, if desired. It is formatted as a percentage or duration. Possible secondary statistics are the same as those for the Primary Statistic described above.

Text

The Text widget allows you to add free-form comments or notes to the wallboard.

Wallboard Text widget

Settings

Text widget settings

Title

The *Title* is the unique name of this Text widget that will be shown on the wallboard. Enter any title you like.

Text

Text is the text to be shown on the wallboard. Use the text field to enter notes, comments, reminders, or anything that you wish to be shown on your wallboard.

Time

The *Time* widget displays the current date and time; there are no settings for this widget.

Time widget

Image

The *Image* widget allows you to upload an image to your wallboard.

Settings

Users with the privilege *Customize Wallboards* may edit the control settings of wallboard widgets. Image settings are as follows.

Image widget settings

Select Image

The *Select Image* setting is where you select the image to upload. Click the **Upload** button to upload the selected image.

Image

Image displays the file name of the uploaded image.

Style

The *Style* setting controls how the uploaded image is displayed within the widget; there are two options: *Contain* and *Cover*

Contain

The Contain display option contains the image within the boundaries of the widget.

Image with Contain display

Cover

The Cover display option centers and stretches the image to fill the entire widget.

Image with Cover display

About User Widgets

User widgets contain data related to an individual user; they are also featured in theMy Grades section of Agent Desktop.

An example wallboard containing all user widgets

Selection of Widgets

The following is a list of user widgets you may add to the cards in your wallboard. To learn more about these widgets, select from the following links:

- Break Time
- Dispositions
- My Stats
- Satisfaction
- Agenda

To add a user widget to your wallboard, you must be in *Edit* mode. Click inside an empty card or draw a card on an empty wallboard spot; both actions will bring up the widget selector. Click on the widget type you want, configure its settings, and it will populate the card.

User widget selector

User Widgets Menu Option

The wallboard [Menu] contains the option **User Widgets**. This option allows you to select and apply the statistics of a member of your team to all user widgets configured in a wallboard.

To configure this option, first select **User Widgets**. Once selected, a settings box will open. Select the desired team member from the *Global User* drop-down menu; the default selection is **Logged in User**. When you click **OK**, this user's statistics will be applied to all user widgets. If you do not wish to proceed with this option, click **Cancel**.

User Widgets menu option settings

Break Time

The *Break Time* widget displays an agent's total idle time out of their allotted Break time. If you hover your cursor over the widget, you may highlight either the break or idle time.

Display of the user widget *Break Time*

Settings

Users with the privilege *Customize Wallboards* may edit the control settings of wallboard widgets. Break Time settings are as follows.

Agent setting with Logged in User selected

Agent

The *Agent* setting allows you to select any member of your team(s) or *Logged in User* (i.e., yourself) for display; the default is Logged in User.

Agent setting with user selected

Dispositions

The *Dispositions* widget displays a count of all dispositions that have been assigned to handled tasks. If you hover your cursor over the widget, you may highlight information about any of the displayed dispositions.

Dispositions widget displaying an agent's statistics

Settings

Users with the privilege *Customize Wallboards* may edit the control settings of wallboard widgets. Dispositions settings are as follows.

Agent setting with Logged in User selected

Agent

The *Agent* setting allows you to select any member of your team(s) or *Logged in User* (i.e., yourself) for display; the default is Logged in User.

Agent setting with user selected

My Stats vs. My Team's

The *My Stats vs. My Team's* widget displays metrics of an agent's performance against their team's. The following metrics are displayed in the widget:

- **Handled**

Displays the number of interactions handled by agents for the day

- **Average handling time**

Displays the average amount of time spent handling and completing interactions

- **Successful interactions**

Displays the percentage of calls that received the Success disposition type

If you hover your cursor over the widget, you may highlight information about any of the displayed metrics.

My Stats user widget displaying an agent's statistics

Settings

Users with the privilege *Customize Wallboards* may edit the control settings of wallboard widgets. My Stats settings are as follows.

Agent setting with Logged in User selected

Agent

The *Agent* setting allows you to select any member of your team(s) or *Logged in User* (i.e., yourself) for display; the default is Logged in User.

Agent setting with user selected

Satisfaction

The *Satisfaction* widget displays customer satisfaction real-time metrics related to an individual agent. The following metrics are displayed:

- Demeanor
- Net Promoter Score
- Resolutions

Satisfaction user widget displaying an agent's statistics

Settings

Users with the privilege *Customize Wallboards* may edit the control settings of wallboard widgets. Satisfaction settings are as follows.

Agent setting with Logged in User selected

Agent

The *Agent* setting allows you to select any member of your team(s) or *Logged in User* (i.e., yourself) for display; the default is Logged in User.

Agent setting with user selected

Agenda

The *Agenda* widget displays upcoming agenda items from an agent's [Calendar](). If there is no agenda, the widget display will be empty.

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

Agenda user widget displaying an agent's schedule

Settings

Users with the privilege *Customize Wallboards* may edit the control settings of wallboard widgets. Agenda settings are as follows.

Agent setting with Logged in User selected

Agent

The *Agent* setting allows you to select any member of your team(s) or *Logged in User* (i.e., yourself) for display; the default is Logged in User.

Agent setting with user selected

About Copy from Existing Widgets

Copy from Existing wallboard widgets are widgets that are configured in other wallboards. The Copy from Existing option allows you to import any configured widget into a new wallboard card.

An example wallboard containing widgets that were copied from existing widgets

How to Copy from Existing Widgets

To copy an existing widget into a new card, follow these steps:

1. Select *Edit* from the menu; this will allow you to make changes to a wallboard
2. Click inside an empty card or draw a card on an empty wallboard spot; both actions will bring up the widget selector.
3. Under *Category*, choose **Copy from Existing**.
4. Under *Choose from other wallboard*, select the existing widget you want to copy. Note: Widgets are displayed alphabetically - first by wallboard name, then widget name (e.g., "Outbound Campaigns: Occupancy").
5. Once selected, the copied widget will populate the card.

Existing widgets are listed alphabetically