

5.3 Tasks Overview

Bright Pattern Documentation

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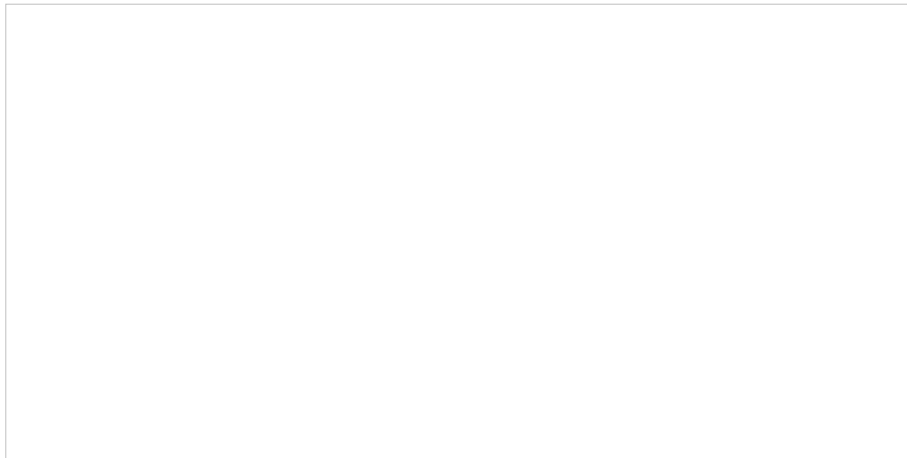
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Results Tab

The *Results* tab provides access to settings related to the export of campaign results as well as the export of call recordings for voice services and chat transcripts for chat services.



Results tab

Campaign results are stored in the calling list database and can be downloaded manually in .CSV format or exported periodically to designated network locations.

Campaign results are archived into .ZIP files when one of the following events occurs:

- The list is deleted from configuration.
- The list is removed from the campaign.
- The list is updated with new content via periodic import with the [update policy](#) set to *replace list data*.

Archived campaign results are listed in the [Archive](#) tab and are available for manual download only.

Note that campaign results are permanently deleted when the campaign itself is deleted.

Storage of recordings is typically defined by the terms and conditions of your service contract. Expired recordings are deleted automatically.

Before configuring the export of recordings, consider the bandwidth and amount of disk space that may be required to transfer and store all of the exported voice files. As a general guideline, use 5.7 MB per agent per working hour to calculate the necessary disk space. Note that some restrictions may be imposed at the service provider level on the hours during which export may take place (see property *Window*) and bandwidth allocated for the export tasks.

Note that if your audio files and/or chat transcripts are encrypted at the time of recording according to your [encryption settings](#), they will be decrypted for export.

Settings

Results tab configuration settings are organized by export type: Periodic Recording Export Jobs, One-time Campaign Results Download, Periodic Export Jobs, and Periodic Salesforce.com Export Jobs. Settings for each type are described as follows.

Periodic Recording Export Jobs

Periodic Recording Export Jobs allows you to configure multiple export jobs for call recordings of this service or campaign. Each export job can have its own schedule, destination, file name format, and a set of filters.

Click **add** to specify a new periodic export job. The following dialog box will pop up.

Note that if your recordings are encrypted while they are stored in the Bright Pattern platform, they will be un-encrypted for export.

[Periodic Export of Recordings dialog window](#)



Name

Name is the name of this export job. This name will appear in the list of periodic tasks. See section *Tasks* for more information.

Enabled

Select the *Enabled* checkbox to activate this export job.

Voice signature only

Select the *Voice signature only* checkbox if the operation shall export only recordings that contain [voice signatures](#).

Dispositions

Using *Dispositions*, export recordings of calls that were dispositioned in a specific way, and select the corresponding [disposition\(s\)](#). To export recordings for all calls regardless of their dispositions, select **All**.

For outbound services, note that recordings for some of the unsuccessful call attempts may not be available unless [the Record CPA phase of call attempts option](#) is selected for the given campaign.

Recording completed after

The *Recording completed after* setting allows you to specify the start time and date from which the recordings will be exported. Upon completion of the initial and each subsequent task export task, this parameter will be updated automatically to show the date and time of the last exported recording. The next [export task](#) will begin with the chronological next recording that satisfies the selection criteria (i.e., service, disposition, etc.).

Daily export time window

Daily export time window is the time window during which export of recordings will take place. This parameter is specified at the service provider level and will appear as read-only.

Use exported files for playback in interaction search

When checked, enables the use of Amazon S3 recordings for playback in interaction records even after your contact center's configured retention interval has passed. If multiple exports are made of the same recordings to different S3 locations and all exports have this option enabled, the recordings will be played back from the location of the last export.

Note: Playback in interaction records will work as long as detailed records in the historical database are preserved and S3 recordings are kept.

This setting only appears when the Amazon AWS protocol is selected as the export method (see section *Protocol* below).

Recordings files folder FTP URL

Recordings files folder FTP URL is where one specifies the FTP site folder where the recordings should be exported.

Recording file name

Recording file name is the specified format of the recording file name and subfolder structure. By default, at the designated network location, exported files are arranged in folders titled *recordings/[date]/[hour]* corresponding to the date and the hours when the calls started. The default recording file name consists of the call start date/time, phone number of the call party opposite to the agent, [username](#) of the last agent to handle this call, and a global unique identifier generated by the system for this recording.

To modify the file name and/or folder structure, click the current format. The current format will appear in an editable field. You can delete any of the current file name components or insert new ones. To add a new component to the current format, set the cursor to the desired place in the file name, click the **Insert placeholder** button, and select the desired component from the drop-down menu. For descriptions of the available file name components, see section [Recordings Details Format](#) of the *Reporting Reference Guide*.

A file name example corresponding to the currently selected format will be displayed under the editable field.

Recording CSV file name

Recording CSV file name is the specified format of the recording details file name.

For each instance of a periodic recordings export, the system also generates a data file. The file is exported to the same network location in the CSV format and contains details of the corresponding calls, which may facilitate searches for specific recordings once they have been exported out of the system. For more information about the **content** of this file, see section [Recordings Details Format](#) of the *ServicePattern Reporting Reference Guide*.

The default data file name is *recordings_details* for voice and *transcripts_details* for chat with the date and time of export added to it (e.g., *recordings_details_\$(currentDate)_\$(currentTime).csv*). **Note:** The following variables may be included in the file name:

- *\$(currentDate)*
- *\$(currentTime)*
- *\$(periodEndDate)*

If you modify the name of the file to include *\$(periodEndDate)*, note that it is the timestamp of the last interaction in the exported batch (e.g., *recordings_details_\$(periodEndDate)*). If there were no interactions in the given export period, the value of *\$(periodEndDate)* will coincide with the end of the export interval itself. If you use this variable in the file name, note that if there are days when your contact center is closed, the names of the data files produced for that day and the following (working) day may have the same date and differ by the time component only.

Protocol

Protocol specifies the export method. In all three methods, if the recordings are stored [encrypted](#), they will be unencrypted for export.

Note that export to AWS must be explicitly enabled by your service provider and configured via [Integration Accounts](#). For all three methods, the exported recordings will continue to be stored and available for playback via Bright Pattern for the recordings storage time agreed upon with your service provider. After the recordings have been deleted from the local storage:

- Recordings exported via FTP/SFTP will no longer be accessible via Bright Pattern.
- Recordings exported to Amazon AWS will continue to be accessible via Bright Pattern on demand for the detailed records storage time agreed upon with your service provider.

Username

Username is the specified FTP username.

Password

Password is the specified FTP password.

Test connection

The *Test connection* button is used to test the FTP connection with the supplied credentials.

One-time Campaign Results Download

This setting allows you to download campaign results locally in the .CSV format. To download, click the **Download now** button, specify the download settings, and click **Export**. The following dialog box will pop up.

Export Campaign Results

Lists

Select the [lists](#) whose records the downloaded file should contain.

Dispositions

If you would like to download records that were dispositioned in a specific way, select the corresponding [disposition\(s\)](#) here. To download results for all records regardless of their dispositions, select **All**.

Format

Format is where you indicate whether the downloaded file shall contain only the last result for each completed record (**simple**), or whether it should include results of all dialing attempts (**detailed**).

For detailed results, specify whether the downloaded list shall contain all call attempts for the records that were completed within the requested time frame or only the call attempts that were actually made within that time frame.

For specification of campaign result formats, see sections [SimpleFormat](#) and [Detailed Format](#) of the *Reporting Reference Guide*.

Between

By default, the downloaded file will contain all records since the last download. Use the *Between* setting to limit the download to contain only information about the records that were closed within a specific time interval.

Timezone

Set the *timezone* for the records to be exported.

Compress file

Selecting the *Compress file* checkbox will download results in a .ZIP file.

Periodic Export Jobs

Periodic Export Jobs allows you to configure multiple jobs for automated export of campaign results via FTP in the .CSV format. Each export job can have its own schedule, destination, and set of filters. Click **add** to specify a new periodic export job. The following dialog box will pop up. Fields shown in red are required fields.

[Edit Export Parameters](#)



Name

Name is the name of this export job. This name will appear in the [list of periodic tasks](#).

Enabled

Selecting the *Enabled* checkbox will activate this export job.

Lists

Select the *lists* whose records the exported results should contain.

Dispositions

If you would like to export records that were dispositioned in a specific way, select the corresponding [disposition\(s\)](#) here. To export results for all records regardless of their dispositions, select **All**.

Format

Format is the specified format of the exported file. Indicate whether the exported file should contain only the last result for each completed record (**simple**), or whether it should include the results of all dialing attempts (**detailed**).

For detailed results, specify whether the exported list should contain all call attempts for the records that were completed within the requested time frame or only the call attempts that were actually made within that time frame.

For specification of campaign result formats, see sections [SimpleFormat](#) and [Detailed Format](#) of the *Reporting Reference Guide*.

Start date and time

This is the specified start date and time of the periodic export.

Export interval

Export interval is the specified frequency for the results to be exported. The minimum update period is

- 1 hour for the **simple** and **detailed** (records and all call attempts) export options
- 15 minutes for the **detailed** (only call attempts performed in timeframe) export option

FTP URL with file name

FTP URL with file name is the specified FTP site and the name of the file to which the results should be exported. The date and time of export will be automatically appended to the file name for each export instance.

Protocol

Protocol is the specified transfer protocol (FTP or SFTP).

FTP username

FTP username is the specified FTP username.

FTP password

FTP password is the specified FTP password.

Test connection

The *Test connection* button is used to test the FTP connection with the supplied credentials.

Periodic Salesforce.com Export Jobs

Periodic Salesforce.com Export Jobs allows you to configure multiple export jobs for automated creation of Salesforce.com objects according to the campaign results. For more information, see section [Importing Calling Lists and Exporting Campaign Results](#) of the *Salesforce.com Integration Guide*.

Each export job can have its own schedule, destination, and a set of filters. Click **add** to specify a new periodic export job. The following dialog box will pop up. Fields shown in red are required fields.

Edit Salesforce.com Export Parameters

Name

Name is the name of this export job. This name will appear in the [list of periodic tasks](#).

Enabled

When selected, the *Enabled* checkbox will activate this export job.

Lists

Select the *lists* whose records the exported results shall contain.

Dispositions

If you would like to export records that were dispositioned in a specific way, select the corresponding [disposition\(s\)](#) here. To export results for all records regardless of their dispositions, select **All**.

Format

Format is the specified format of the exported file. Indicate whether the exported file shall contain only the last result for each completed record (**simple**), or whether it should include results of all dialing attempts (**detailed**).

For specification of campaign result formats, see sections [SimpleFormat](#) and [Documentation:ServicePattern:reporting-reference-guide:DetailedFormat | Detailed Format\]\]](#) of the *Reporting Reference Guide*.

Start date and time

This is the specified *start date and time* of the periodic export.

Export interval

Export interval is the specified frequency for the results to be exported. The minimum interval is 15 minutes.

Salesforce.com integration account

Salesforce.com integration account is the [integration account](#) that will be used to access the Salesforce.com records to be updated.

Salesforce.com object

This is the *Salesforce.com object* that will be updated using the results of this campaign.

Map fields

Use the *Map fields* button to map Bright Pattern Contact Center campaign result fields to the properties of the specified Salesforce.com object.

For specification of campaign result formats, see sections [SimpleFormat](#) and [Detailed Format](#) of the *Reporting Reference Guide*.

Test by creating object

Click this button to create a test *Salesforce.com object* according to the mapping you specified using the *Map fields* button. Check your Salesforce.com application to make sure the object has been created.

Interactions Erasing

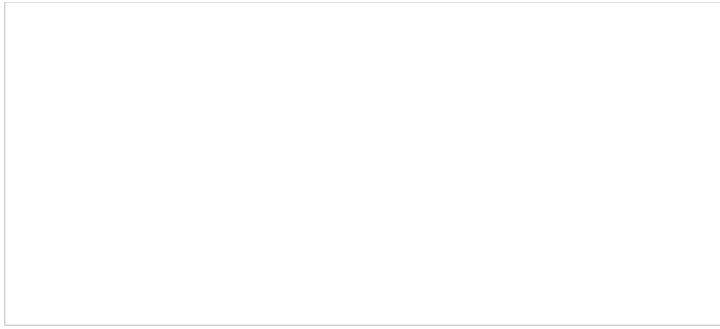
To support compliance with various regulations related to data ownership and privacy, such as GDPR, Bright Pattern allows for the manual erasure of data that is stored in interaction records for voice recordings, voice recording transcripts, chat transcripts, email messages, screen recordings, and other such interaction content.

The ability to remove sensitive data from interaction records is enabled for users with the Security Administration [privilege](#) "Can edit and erase interaction records."

System administrators with the privilege to edit and erase interaction records can erase content for specific services and campaigns by using the *Interactions Erasing* feature in the *Services & Campaigns Results* tab. Note that to erase any content, you must provide a reason.

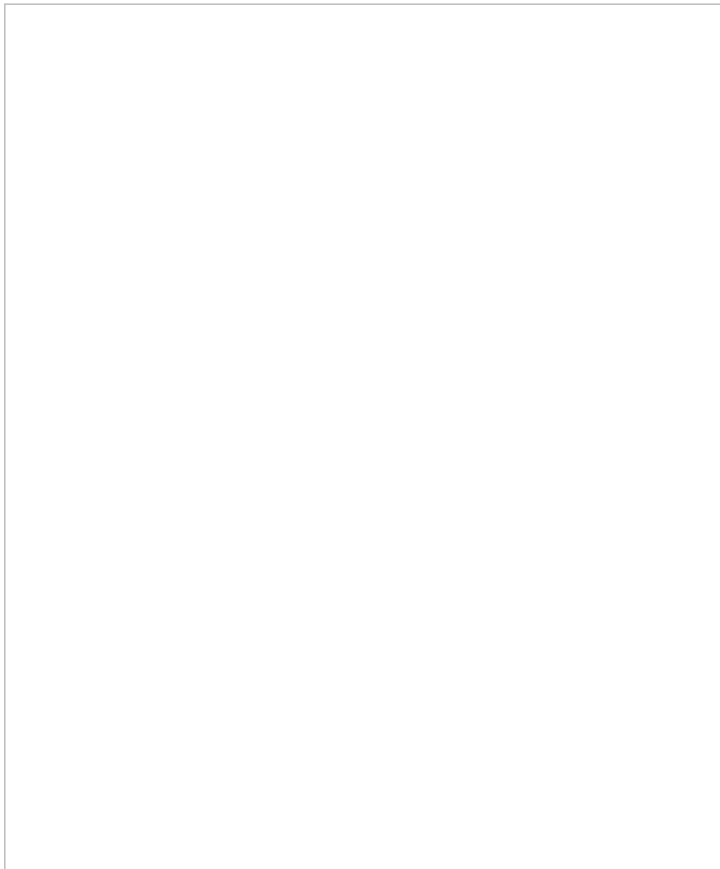
How to Erase Interaction Content

1. Go to *Services & Campaigns* and select the desired service or campaign from the list.
2. Click the **Results** tab and click **Start erasing**.



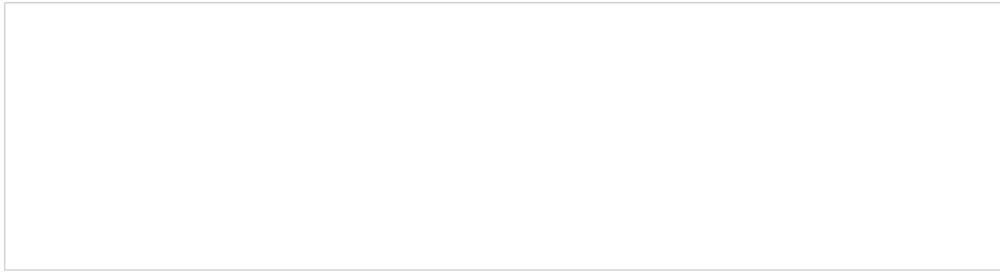
Results > Interactions erasing

3. The *Erase interaction* dialog will appear.



Erase interaction dialog

4. Select the *items to erase*, choosing from the following options: Voice recording, Transcript of voice recording, Chat transcript, Email message, and Screen recording.
5. In the *From date* field, specify the date of the interaction to be erased.
6. In the *Reason* field, document the reason for erasing the content. Note that this field is mandatory.
7. Click **Erase**.
8. A warning dialog will inform you that *The requested operation will irrevocably destroy the [recording/transcript/message body] of selected interaction(s)*. To proceed, click **Erase**.



A warning message appears

The erase action will be recorded in your contact center's audit log.

Scheduled and In-Progress Tasks

The Tasks view provides a convenient way to see all automated contact center tasks that may have been scheduled for periodic execution, such as periodic report generation or automatic start and stop of outbound campaigns. The tasks whose execution has ended appear in the task log.

To view the tasks that have been scheduled for execution and the ones that are currently being executed, select the *Scheduled and In-progress Tasks* option from the *Tasks* menu. The scheduled and progress tasks will appear in the list view in the upper portion of the screen. Depending on the type of the selected task, you may be able to see and edit task information and request an immediate execution of this task.

Scheduled and In Progress Tasks List View Fields

The fields for the *Scheduled and In Progress Tasks* list view have the following meanings.

Start time

Start time is the date and time when the next execution of the given task is scheduled to take place.

Object Name

Object Name is the name of the object for which this task is executed. For example, for a task of the *Campaign trigger* type, this field shows the name of the campaign.

Task Name

Task Name is the name of the task being executed.

Number of Attempts

This value is the number of execution attempts.

State

State is the current state of this task, scheduled or in progress.

Progress

For the tasks that are in progress, *Progress* displays the overall progress of the task execution.

Type

This is the *type* of task, which can be one of the following:

- *Report execution*: Periodic report generation and distribution. For more information, see section [Scheduled Reports](#).
- *Campaign trigger*: Automatic start and stop of an outbound campaign. For more information, see section [Outbound - General](#).
- *Campaign results export*: Periodic export of results of an outbound campaign. For more information, see section [Services and Campaigns - Results Tab](#).
- *Calling list import*: Periodic import of a calling list. For more information, see section [Lists](#).
- *Import exclusions by account*: Periodic import of a Do Not Call list of the *Record Exclusion* type. For more information, see section [Do Not Call Lists](#).

Step

Step refers to the task step that will be executed at the time specified in *Start Time*. This parameter may be helpful, for example, for the tasks of the *Campaign trigger* type, since it shows whether the campaign will be started or stopped at the specified time.

Task Log

To view the task log, select the *Task Log* option from the *Tasks* menu. The results of scheduled task execution appear in the log in the chronological order. Note that you can reverse the order by clicking on the *Start Time* column title, or you can use a different field for sorting.

The fields for the Task Log are shown in columns, and they can be sorted according to state. Task Log fields have the following meanings.

Start time

Start time refers to the date and time when execution of the given task started.

End time

End time refers to the date and time when execution of the given task ended.

Object Name

Object Name is the name of the object (i.e., the service, list, or report) for which this task was executed.

Task Name

Task Name is the unique name given to this task. Previously, this column was called "Resource Name."

Duration

For successful tasks, the *Duration* column shows the execution time in mm:ss format.

Size (KB)

The *Size* column shows the task's transfer size in KB. For lists, this is size of the list file sent/received, whereas for reports, it is size of the report. For email, this is the size of the email.

Result

Result is the task execution result, which can be either *completed* or *failed*.

Error

The *Error* column shows the error message if the task has failed.

Type

Type refers to the type of task. See section *Scheduled and In Progress Tasks* for more information about the task types.

Step

Step refers to the task step that was executed at the time specified in *Start Time*. This parameter may be helpful for the tasks of the *Campaign trigger* type, since it shows whether the campaign was started or stopped at the specified time.