5.3 Users & Teams Overview

Bright Pattern Documentation

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Users

A user is anyone who may need access to any functionality of Bright Pattern Contact Center. Each user in the Bright Pattern Contact Center configuration must be assigned to a [team](#). The level of users' access to the system's functions is defined by their assigned [roles](#). Thus, you should typically have both the roles and teams defined in your configuration before you begin to register your users.

Most of the users will access Bright Pattern Contact Center via the Agent Desktop application. The exact set of functionality available to a logged-on user via this application depends on the [role(s)](#) assigned this user in your contact center configuration.

- The *[Agent Guide](#)* provides detailed instructions for the use of Agent Desktop by contact center agents and back-office (PBX) workers.

- The *[Supervisor Guide](#)* provides detailed instructions for the use of Agent Desktop by contact center supervisors and campaign operators.

Although most of the Agent Desktop functionality is implemented using thin-client technologies, some of its capabilities require a software component that is installed on users' computers. This component is called Agent Desktop Helper Application. For more information about the functions of this component and methods of its installation, see section [Agent Desktop Helper Application](#).

The computers of users of the Agent Desktop application must conform to a number of[system requirements](#).

How to Define and Edit User Information

To view, define, and edit user information, select the **Users** option from the *Users & Teams* menu.
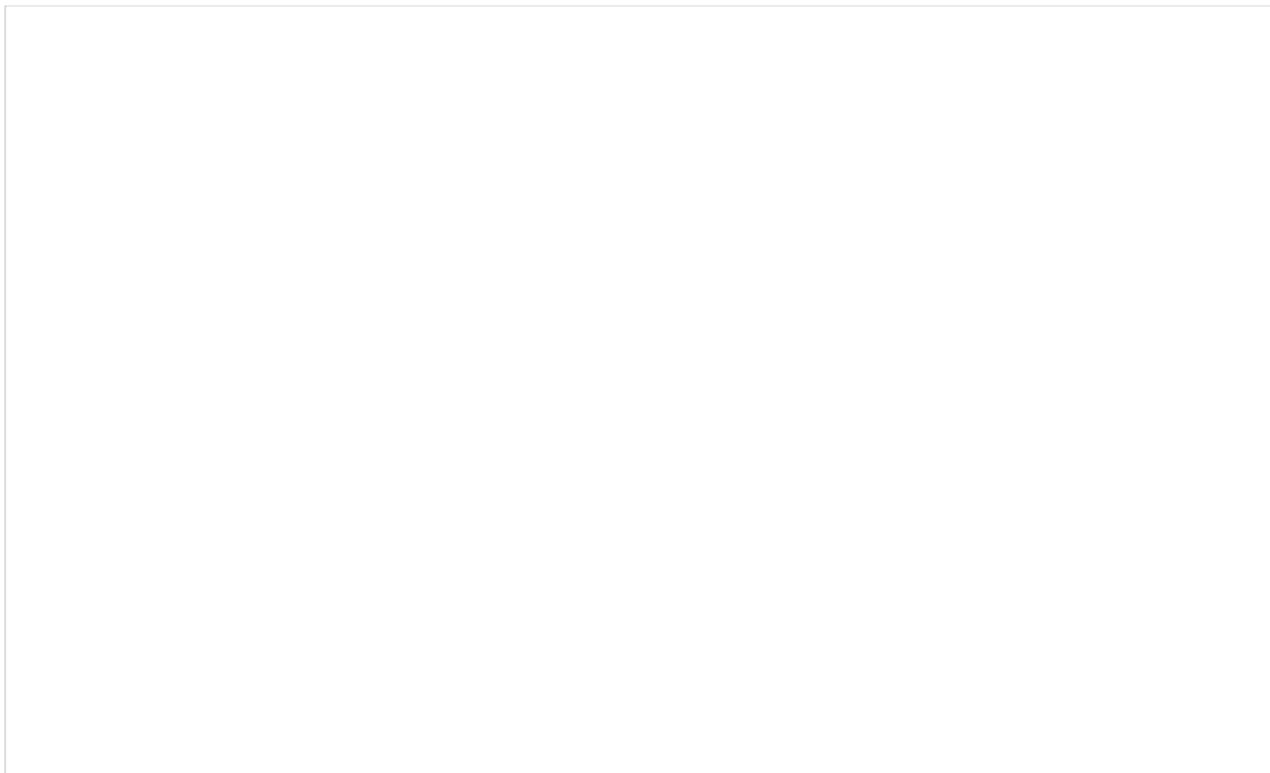
Users & Teams > Users

The Users list provides the following information:

- **First Name** - The first name of the user
- **Last Name** - The last name of the user
- **Extension** - The extension number of the user
- **Roles** - The assigned role(s) for the user (e.g., agent, supervisor, etc.)
- **Team** - The assigned team(s) for the user
- **Created on** - The date that the user was created in the system
- **Last login on** - The date of the user's last login to the system

Importing Users from a Spreadsheet

You can import user information from an Excel spreadsheet instead of entering it manually. You can also export user information to an Excel spreadsheet. Import and export operations are activated by the arrow buttons at the bottom of the user list view. For information about the spreadsheet format, click the **import** button. An easy way to obtain a user import template is to add a few users manually first, apply the export operation, and use the produced spreadsheet as an import template.

If you do not wish to use certain records during a particular instance of import, but you would like to keep those records in the spreadsheet for possible use in the future, you can add a column with name *Delete* to the spreadsheet and set its value to *yes* for the records that are not to be imported.

Screen Properties

Person tab

The **Person** screen properties are described as follows. Note that users can change some of their profile properties directly via the Agent Desktop application. These properties are marked with an asterisk (*). For more information, see section Configuring Your User Profile of the *Agent Guide.*

Note: Some service configuration changes that affect agent behavior are not picked up dynamically by Agent Desktop. Thus, after making a change to user information that appears in the user's profile, we recommend that all affected agents re-login to Agent Desktop and/or refresh their browser page.
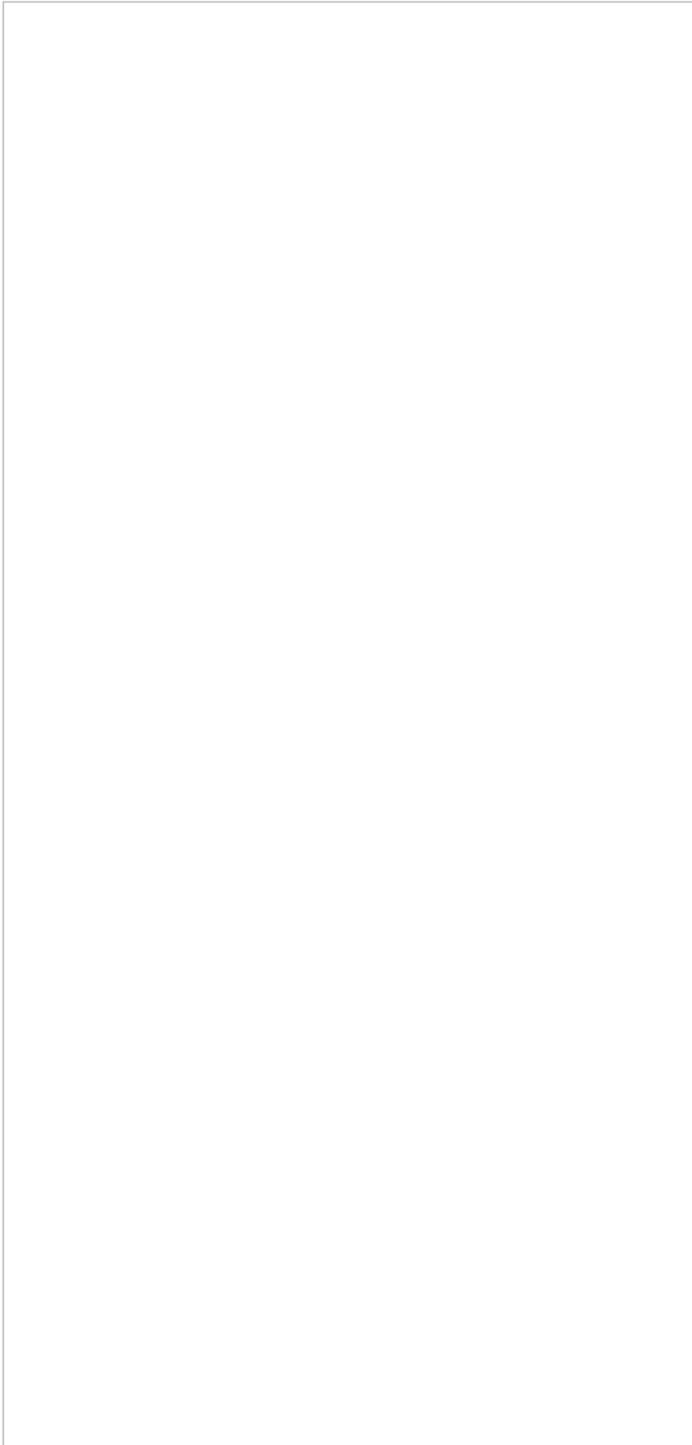
Users > Person tab

Username

Username is the name that the user will enter when logging in to Agent Desktop or any other Bright Pattern application. Username is mandatory and must be unique within the contact center.

Note that a username can be changed; in order for changes to be made, this feature must be enabled by your service provider for your contact center. If enabled, username changes can be done only via the Contact Center Administrator application and the [BPCC SCIM-Compliant User Provisioning API](#). Username changes cannot be done via the Agent Desktop application, user import, or the BPCC Configuration API.

When changing a username, please consider the following:

- Username change does not change the historical records created prior to the username change, which contain the old username. If a user's username is changed and you wish to include the user's data in historical reports from before and after the change, do the following:
  - From the [Agent](#) filter, select the user's current name.
  - From the [Agent](#) filter, select the **Show disabled/deleted agents** checkbox, then select the user's former name.
  - Please note that the Agent filter uses first and last name, so if the username was changed, but the first and last name stayed the same, a person with the same name may appear in both active and disabled/deleted users.
- If a user is logged into the Agent Desktop application when her username is changed, a banner displays the message, "Your username has changed. Please log out and log in with the new username." The user's softphone will continue the current call; however, they will not be able to refresh registration, accept, or make new calls.

Password

Password is the password that the user will enter when logging into Agent Desktop or any other Bright Pattern application. This field is displayed for new users only and its specification is mandatory. Note that some rules related to password complexity (i.e., length, special characters, etc.) may be defined and enforced at the service provider level.

Confirm password

The *Confirm password* field is mandatory.

Change password

The *Change password* option is displayed for existing users only, and it is used to change the selected user's password. This option will typically be used by an administrator to change passwords of other users. Users can change their own passwords via the Agent Desktop application.

API secret

The *API secret* is a unique, secret string that identifies the user (i.e., user credentials). The API secret is used during authentication to request an access token for Bright Pattern APIs, such as the [Configuration API](#) and others.

Disabled

Disabled indicates whether the user is active. Select this checkbox to disable user's access to all system functions temporarily. Disabled users are shown dimmed in the user list view.

Note that inactive user accounts may also be disabled automatically. See section Security Policy for more information. Disabled users are still counted as named users in your configuration.

User must change password on next login

This property indicates whether the user will be forced to change the password upon the next login. To comply with the PCI DSS security standard, select this checkbox for every new user.

As soon as the user changes the password, the check mark will be removed automatically. You can force the user to change password at any time by selecting this checkbox again.

This property exists to support manual password change enforcement. Note that the system also supports automatic password expiration. See section Security Policy for more information. The related automatic password changes are not reflected by this property.

Lockout

Lockout indicates whether this user can access the system or is currently locked out due to a security policy violation. See section Security Policy for more information. You can click the link to view current lockout status. If the user account is locked out, you can unlock it by clicking the **Unlock** button.

First name

First name is the user's first name. This field is mandatory.

Last name

Last name is the user's last name. This field is mandatory.

Team

Team is the team to which this user is assigned. A Bright Pattern Contact Center user must be assigned to a team, and a user cannot be assigned to more than one team. See section Teams for considerations regarding assignment of users to teams.

Note that teams may be associated with services. Upon assignment to such a team, the user may get a corresponding service skill with a certain level automatically. You can change the level or remove the skill from the user manually using the Skill Levels option.

Training Class

Training Class, a feature of the Omni QM module, allows you to define a training class for a given user. Training Classes are created in the Contact Center Administrator application, section Users & Teams > Training Classes. Training Class is used as an optional search parameter in select QM Reports; for more information, contact your service provider.

Supervisor in charge

Supervisor in charge, a feature of the Omni QM module, allows you to define a specific supervisor as being responsible for a given user. Supervisor in charge is used as an optional search parameter in select QM Reports; for more information, contact your service provider.

Record calls

The *Record calls* checkbox allow you to record a specific agent's calls. Note: If [call recording](#) is enabled as a global setting, this checkbox option will change to **Do not record calls** and you can mark specific agents to not record.

Title

Title is the user's job title. This property is used for information only. For user's access privileges, see section[Roles](#) below.

About me

About me is the optional information that users will typically enter themselves via their[Agent Desktop profile settings](#).

Photo

This is the user's photo. The photo will appear in the[Contact Info Panel](#) of the Agent Desktop application during internal communications. If you use chat services, the photo can also be displayed to customers when they communicate with this agent via chat. To upload a photo, click **upload**. To remove the photo, click **remove**.

The default maximum size of uploaded photos is 10 MB; the photo will be compressed to fit the user interface elements where it is displayed. Note that the maximum size of uploaded files may be further limited by your service provider.

Maximum concurrent chats - Limit number of chats on the agent

Maximum concurrent chats lets you define the total number of concurrent chats an agent will process at a given time. If this setting is configured, the system will choose the smaller number from between this setting and the [Omni-Channel Routing](#) setting for chat (i.e., if chat is configured at the maximum, too).

Note that when set to a lower number of chats than set in omni-channel routing, this setting will impact agent occupancy, where 100% of occupancy will be the maximum number of chats from the omni-channel routing setting, and less when clamped down by this per-user setting (e.g., 4 chats in omni-channel routing - 100%, clamped to 3 - 75%).

Contacts tab
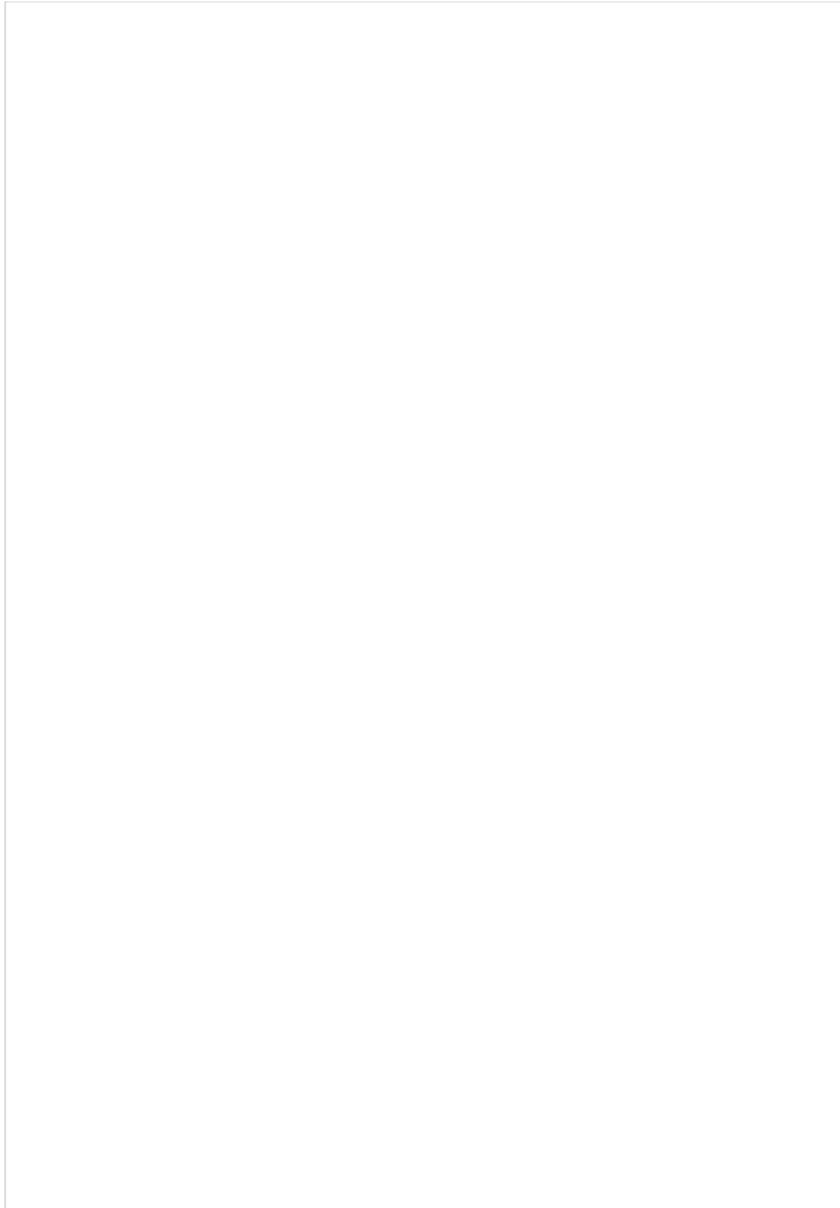
Users > Contacts tab

Chat nickname

Chat nickname is the name that will be displayed to other parties when they communicate with this user via chat.

Rank

Rank is the user's rank. This optional setting can be used as an additional selection criterion in custom agent reports. This setting is essential for users who are agents only.

Phone extension

Phone extension is the extension number of the user's [softphone](). This mandatory setting must contain numeric characters only and must be unique within the contact center. Note that if you have any hardphones registered in the system, their numbers cannot be assigned as users' phone extensions. See section [Hardphones]() for more information.

The extension can be used in combination with a user's *PIN code for phone login* (see below) for authentication through interfaces that only accept numeric input (e.g., an IVR system).

Bright Pattern Contact Center assigns extension numbers to new users automatically in ascending order starting from 1000. You can change the default number to any other value. In this case, the default extension number assigned to the next new user will be the newly defined value + 1. Extension numbers are recycled (i.e., when you delete a user, that user's extension number will be assigned by default to the next new user).

A user's extension number cannot be changed while the user is logged on to that extension; if a change is attempted, an error message will display, *"Cannot change extension number while agent is logged on that extension."* Also note that the user can log in with a different number (e.g., a hardphone number).

For more information about user phone device options, see section [Selecting a Phone Device](#) of the *Agent Guide*.

Forward all calls for ext...

This indicates whether call forwarding is activated for the user's *phone extension*.

Call forwarding can also be activated via the extension's properties; see section [Softphones](#). Section [Forwarding and Voicemail Operation](#) explains how forwarding will work with various [phone devices](#) that the user can select upon login.

Note that call forwarding takes priority over voicemail. If the user has had voicemail enabled (see below), activation of call forwarding for this user will automatically disable the voicemail function.

to

This field represents the phone number to which incoming calls will be forwarded. The phone number must be specified if the *Forward all calls to ext...* checkbox is selected.

Forward on no answer after

Forward on no answer after is the time (in seconds) after which incoming calls will be forwarded to the number specified if the user is logged on and does not answer. The amount of time must be specified if the *Forward all calls to ext...* checkbox is selected. For immediate (unconditional) forwarding, set the timeout to 0.

If the user is unreachable (busy or logged out), incoming calls will be forwarded to the specified number immediately, regardless of this setting.

Default hardphone number

Default hardphone number is the extension number of the hardphone assigned to the user. This setting is optional but if specified, it must be one of the existing hardphone extension numbers (see section [Hardphones](#)). This parameter should be defined only for users who normally use permanently assigned hardphones installed at their personal desks. To log into the Agent Desktop application with this hardphone, the user should select option **Default phone**. For more information about a user's phone device options, see section [How to Select a Phone Device](#) of the *Agent Guide*.

The call forwarding settings will not take effect on the default hardphone. Instead, the forwarding settings configured for the hardphone itself will apply (see section [Hardphones](#)).

Enable voicemail

Enable voicemail indicates whether the voicemail function is enabled for the user. For general voicemail settings, see section [Voicemail](#).

Section [Forwarding and Voicemail Operation](#) explains how voicemail will work with various [phone devices](#) that the user can select upon login.

Note that call forwarding takes priority over voicemail. The voicemail function cannot be enabled if the user already has call forwarding activated. If the user has had voicemail enabled, a temporary activation of call forwarding for this user will automatically disable the voicemail function; however, the voicemail configuration (the *No Answer* timeout and current greeting) will be preserved and will take effect as soon as call forwarding is deactivated.

Send to voicemail after

Send to voicemail after is the time in seconds after which an incoming call will be forwarded to voicemail if the user is logged on and does not pick up the call. The amount of time must be specified if the *Enable voicemail* checkbox is selected.

If the user is unreachable (busy or logged out), incoming calls will be sent to the user's voicemail immediately, regardless of this setting.

Use this voicemail greeting

This option lets you upload up to three different personal voicemail greetings for the user and select which one should be used. Individual greetings may be deleted as necessary.

Users can also record their personal greetings directly via their Agent Desktop application. For more information see section [Configuring Your Voicemail](#) of the *Agent Guide*.

Work phone

Work phone is the user's work phone. This optional setting is used for informational purposes only.

Mobile phone

Mobile phone is the user's mobile phone number. This optional setting is used for informational purposes only.

PIN code for phone login

The PIN is the user's numeric password that can be used in combination with user's *Phone extension* for authentication through interfaces that accept only numeric input (e.g., an interactive voice response (IVR) system).

Email address

Email address is the user's email address that the system will use for delivery of password reset instructions, voicemail messages, and scheduled reports. It must be specified if the voicemail is enabled because the user will be notified of new voicemail messages via email.

Note that this email address is not used for distribution of service email interactions to the agents.

Location tab

This tab lets you specify various optional properties related to a user's geographical location.
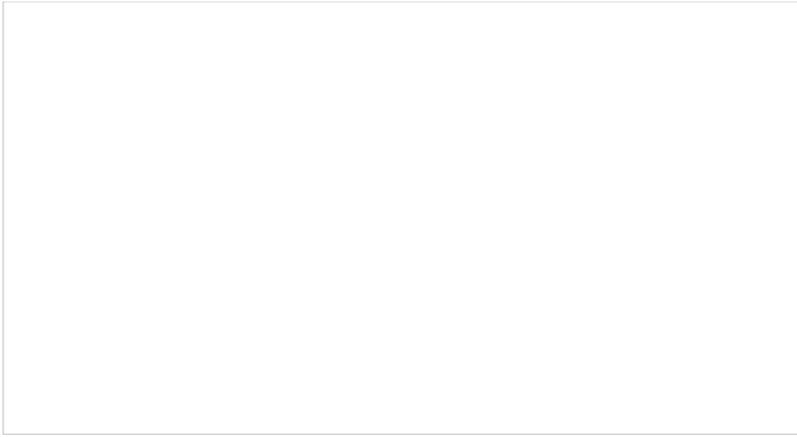
Users > Location tab

Region

The geographic region for the user (e.g., "US"). This property is required.

Your contact center is associated with a region by default. The Region selector is used to initialize user region at the time of creation. If your service provider has enabled multiple regions to be used for your contact center, you will be able to select a non-default region for the user from the selector.

Time zone

The time zone for the user (e.g., "-08:00 America/Los_Angeles"). This property is required.

Country

The country in which the user works (e.g., "United States"). This property is optional.

State/Province

The state or province in which the user works (e.g., "CA"). This property is optional.

City

The city in which in which the user works (e.g., "San Bruno"). This property is optional.

Login Info tab

This tab provides a variety of user login information; it may be consulted for quick user diagnostics. The properties are as follows.
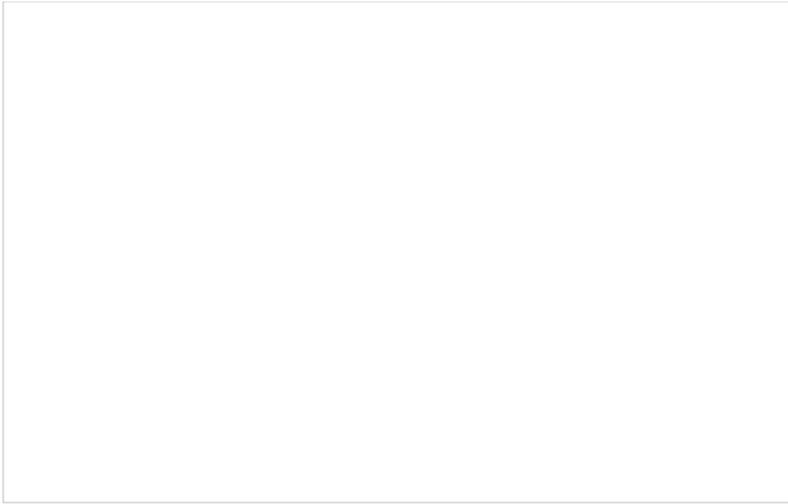
Users > Login Info tab

Last login

Captures the date and time the user is first authenticated within the system for the day (i.e., the Contact Center Administrator application or the Agent Desktop application); note that it is not updated if the user opens additional applications or changes to/from the Supervision mode

Last logout

Captures the date and time the user last logged out of the application for the day (i.e., the Contact Center Administrator application or the Agent Desktop application)

Browser type and version

Displays the name and the version of the web browser the user used in the most recent session

Selected phone device option

Displays the phone device option the user used in the most recent session

OS

Displays the name of the user's operating system

IP address (public)

The public IP address of the user

Raw User-Agent string

Displays the HTTP User-Agent browser identification header, which is automatically submitted by the web browser

Roles tab

A user can be assigned any number of roles that define what kind of system functionality can be accessed. For more information, see section [Roles](). Select a role from the list in order to assign it to the user.
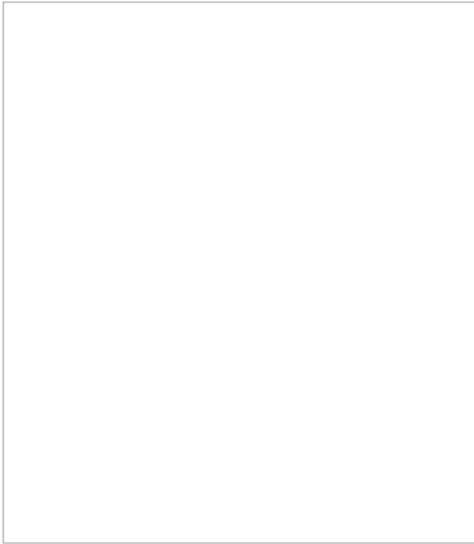
Users > Roles tab

By default, new users do not have any roles assigned to them. Since the majority of users registered in your configuration are likely to be agents, you can configure automatic assignment of the *Agent* role to every new user. See the description of property *Assign this role to newly created users* in section [Roles]() for more information.

Forwarding and Voicemail Operation

The following table specifies how the forwarding and voicemail functions will work with various[phone devices]() that the user can select at the time of login.

Phone device	Forwarding enabled	Voicemail enabled (with forwarding disabled)
Softphone	Forwarded by timeout	Sent to voicemail by timeout
Internal phone	Forwarded according to the hardphone forwarding settings; if the latter is not set, the call is disconnected by the general no answer timeout	Sent to voicemail by timeout

External phone	Forwarded by timeout	Sent to voicemail by timeout
Default phone	Forwarded according to the hardphone forwarding settings; if the latter is not set, the call is disconnected by the general no answer timeout	Sent to voicemail by timeout
Dial-in and keep line open (aka nailed connection)	Forwarded by timeout	Sent to voicemail by timeout
No phone	Forwarded immediately	Sent to voicemail immediately
Logged out	Forwarded immediately	Sent to voicemail immediately

Teams

Teams typically reflect the organization of your contact center. Agent teams, for example, are organized for convenient real-time management so that when a supervisor logs into his or her desktop application, the supervisor will see only the agents of the team that the supervisor is assigned to manage. Agent teams will also appear in historical reports for team-level performance evaluation. Note that team membership of agents may not have any direct effect on the distribution of specific service interactions to them.

Teams for other contact center personnel are set up for organizational purposes only. For example, you can have teams that reflect main functions of contact center management (e.g., campaign operators, scenario designers, workforce managers). Upon initial solution setup, the default team Administrators is created automatically. You can use this team to register initially all non-agent personnel who need access to the system. Note that team membership of non-agents does not have any effect on their ability to access specific contact center resources and functions. Such ability is defined by roles assigned at the individual user level. (See section Roles for more information.)

Note: Supervisors are assigned at the team level. You may add a supervisor to a team from the*Properties tab > Supervisors* (see the screen properties below).

To set up and edit teams, select the *Teams* option from the *Users & Teams* menu.

Users & Teams > Teams

Organization

Teams are organized into four tabs shown at the top of your screen: Properties, Members, Services, and Dashboard. Click each tab to view and edit specific fields.

Properties Tab

Teams > Properties screen properties

Name

The *Name* is the team name. This field is mandatory, and the name must be unique within the contact center.

Supervisors

Supervisors who are assigned to manage this team may be optionally added. To add a supervisor, click **edit** and select one or more supervisors from the list of users that have the supervisor role. This setting, while optional, is essential for agent teams only. Supervisors assigned to a team will be able to monitor activities of all agents in that team in real time via their desktop applications. Supervisors themselves may or may not be members of the teams that they are assigned to supervise. The system does not impose any restrictions on how many teams one supervisor can be assigned to manage.

Evaluators

Evaluators, a feature of the Omni QM module, allows you to assign users to a team whose main job will be to perform quality evaluations. For more information about Omni QM, contact your service provider.

Exit After Call Work

Exit After Call Work allows you to set the maximum time in the After-call Work state for the agents of this team. This setting is optional and is essential for agent teams only.

A pull-down menu displays three options:

- Select **system-wide setting** to use the [timeout defined at the contact center level](#)
- Select **manually** to allow the agents of this team to remain in the After-call Work state until they exit this state manually
- Select **automatically, after** to set the desired timeout in seconds.

Enter After Call Break

Enter After Call Break enables you to specify whether the agents of this team will be allowed to have any rest time when they finish handling a service call (including After-call Work, if it is defined). This setting is optional and essential for agent teams only.

A pull-down menu displays three options:

- Select **system-wide setting** to use the [contact-center-level setting](#)
- Select **enter Break state** to enable the rest time
- Select **do not enter Break state** to make agents automatically ready for next call as soon as they finish handling of current service calls.

Exit After Call Break

Exit After Call Break is where you set the maximum time in the Break state after finishing a service call for the agents of this team. This setting is optional and is essential for agent teams only.

A pull-down menu displays three options:

- Select **system-wide setting** to use the [timeout defined at the contact center level](#)
- Select **manually** to allow the agents of this team to remain in the Break state until they exit this state manually
- Select **automatically, after** to set the desired timeout (in seconds).

Non-call cases URL

This setting can be used to display an external web resource to the agents of this team (for example, a search screen of an external knowledge base). Unlike [Web Screen Pop](#), where a page is displayed with respect to a specific interaction, the web resource specified here will be available to the agent at any via the [Agent Desktop Home Screen](#).

A pull-down menu displays three options:

- Select **system-wide setting** to display the [web page defined at the contact center level](#)
- Select **none** to display no web pages
- Select **custom** to set a web page specific to the agents of this team.

Directory Static Entries

[Static entries](#) describe names and contacts of people/organizations that are external to your contact center. These entries appear in the [directory](#) of the Agent Desktop application. For your convenience, related static entries are arranged in folders.

By default, agents will be able to see **All** directory folders. To select specific folders that the agents of this team will be able to see, click **Selected**, click **edit**, and select the folders in the dialog window that appears. Highlight the desired folders and click the arrow buttons to select or remove them; then hit OK.

Members tab

Teams > Members tab screen properties

Members List

The *Members List* shows all the members (i.e., users) who are currently assigned to this team. Each team member is listed with the following information displayed: first name, last name, extension number, and assigned [roles](#).

Move to another team

Located at the bottom of the window, the *Move to another team* button allows you to move selected members (users) to a different team. Select one or more members from the list, and then click the button. In the dialog box that pops up, select the team in which your selected member (user) will be placed. Click **OK**.

Change roles

Located at the bottom of the window, the *Change roles* button control allows you to assign or remove the [roles](#) of the selected user(s). Select one or more users from the list, click **Change roles**, and select the new role(s) as appropriate. Click **OK**.

Services tab
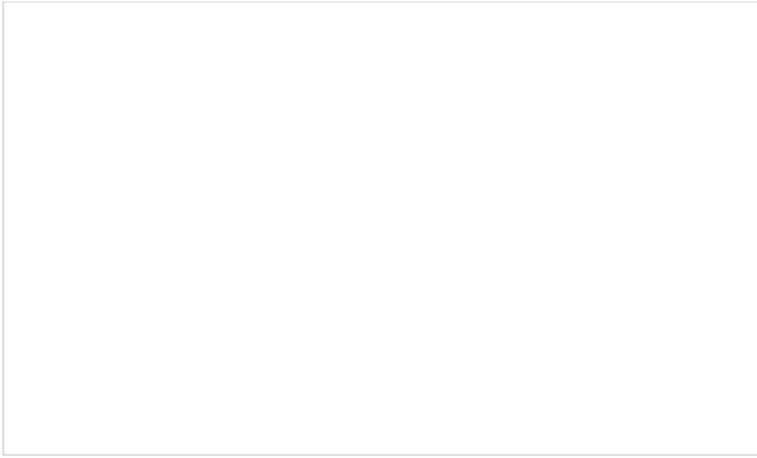
Teams > Services tab properties

Services and campaigns provided by this team

This setting allows you to designate the services that are provided by the agents of this team. This setting is essential for agent teams only. When you assign a service to an agent team, you have the option to assign the default service skill to all members this team with a specific level. If you select this option, all current and future members of the team will get this service skill automatically. Individual levels can be changed manually later. In addition, when you assign a service to a team, supervisors of that team will be able to monitor this service in real time via their desktop applications. For more information, see section [Skill Levels](#).

Click *edit* to assign one or more of the available services to this team and/or to remove previously assigned services. Note that when you remove a service from a team, the associated default service skill will be removed from all members of this team. In the dialog box that pops up, select from the *Available services* on the left and use the arrow controls to move them to *Selected services* on the right. To unassign services from the team, select from the *Selected services'* on the right and use the arrow controls to move them to the *Available services* on the left.

Note: Some service configuration changes that affect agent behavior are not picked up dynamically by Agent Desktop. Thus, after making a change to the list of assigned services, we recommend that all affected logged-in agents refresh their browser page.

Dashboard tab

The **Dashboard tab** contains properties that let you configure the content and appearance of metrics for the agents of the given team.
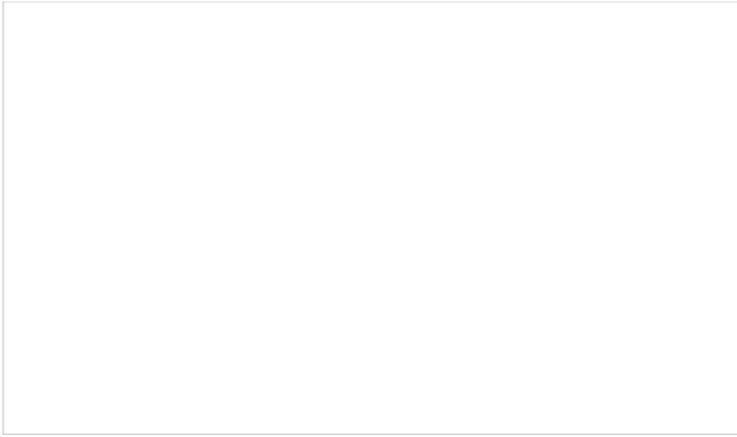
Teams > Dashboard screen properties

General information

The Agent Desktop application shows agents real-time metrics related to their personal performance, as well as the performance of their teams and services that they deliver. For more information, see section Dashboard of the *Agent Guide*.

Rotation rate

If an agent handles interactions for several different services/campaigns, metrics related to those services will be displayed for one service at a time. The dashboard will automatically rotate displayed services. *Rotation rate* defines the frequency with which such rotation will take place. From the pull-down menu, select from the following rates (in seconds): **none**, **5 sec**, **10 sec**, **15 sec**, or **20 sec**.

Metrics

Metrics are the data that will be displayed for members of the given team. To add a metric, click **add** and select the desired metric from the drop-down *Metric* menu. For descriptions of the available metrics, see section Agent Dashboard Metrics.

To help with self-evaluation, current values of an agent personal metrics can be provided with the agent's current ranking within the team (checkbox **Show team ranking**), and performance of the closest other agent in ranking (checkbox **Show next value**).

Newly created dashboard metrics will appear at the end of the list. To change the position of a metric in the dashboard, drag it to the desired new location. To edit or remove an existing metric, hover your cursor over it and select the desired function.

Label

The *Label* is the metric name as it will be displayed in the Agent Desktop. Due to the limited space allocated for the metrics on the desktop, metric names should be displayed in an abbreviated form.

Show team ranking

Show team ranking is available for personal agents' metrics only. Select this option if you want the agent's metric value to be accompanied with his current ranking within the team according to this metric. This can help agents with self-evaluation of their performance.

Show next value

Show next value is available for personal agents' metrics only. Select this option if you want the agent's metric value to be accompanied with the value of the same metric for the agent who is directly ahead of this one in the current ranking. (If the agent currently has the top ranking, the value of the next best agent will be displayed.)

Excluded services and campaigns

By default, the metrics you configure will be displayed for all services and campaigns assigned to the given team. If you do not want certain services to be displayed, click **add** and select the services that should be excluded.

Preview

Preview shows you how the dashboard that you have configured will be displayed in the Agent Desktop application.

Note that due to a limited space allocated for the metrics on Agent Desktop, if the given team provides multiple services, metrics related to those services will be displayed for one service at a time.

To see what the dashboard will look like for a specific service, select the desired service from the list. (The difference in the dashboard appearance for different services may be due to service-specific [disposition metrics](#).

Agent Dashboard Metrics

Most of the metrics available for display in the agent dashboard are also available via the real-time metric views of the supervisor's desktops. You can find [detailed description of those metrics](#) in the Bright Pattern Contact Center *Supervisor Guide*. For general dashboard configuration settings, see section [Teams](#).

The metrics that are specific to the agent dashboard are explained as follows. Unless specifically noted otherwise with respect to a particular metric, all metrics are calculated since the [reset time](#).

AACW

The average daily time agents spend handling after-call work (ACW).

Dispositions

The number of interactions handled by the agent for the given service with the selected disposition. For more information about dispositions, see section [Services and Campaigns - Dispositions tab](#).

Select the desired service from the drop-down menu on the left, and then select the desired disposition from the menu on the right. To display the total number of interactions for the given service that the agent completed with any disposition, select the **Show total dispositioned calls** checkbox.

HR

The total number of interactions of the given service handled in the last hour. This metric is not counted for email services.

IN Handled

The number of inbound interactions that have been handled and completed by agents for the day.

IN Max Wait

The current wait time of the email that has been waiting in the queue the longest time (and is still waiting), compared to all other emails currently waiting in the same queue. This includes service closure hours and is available for both Push and Pull distribution modes.

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

IN Svc Level %

The percentage of calls answered before the threshold time (30 seconds by default) calculated over most recent 20 calls (short abandoned calls are excluded).

For email interactions, it is the percent of emails replied to within the predefined service level threshold, relative to all replied emails; these include those replied to automatically and those replied to by the agent.

IN Transferred

The number of inbound interactions that have been transferred to an external service.

IN Waiting

The number of inbound calls currently in Queued state. This includes both inbound calls and callbacks dialed and answered by the customer.

OUT Call Rate

The current number of outbound calls being attempted by agents per minute.

OUT Dialed

The total number of outbound calls agents have placed for the day.

OUT Handled

The number of outbound interactions being handled and completed by agents, including non-replies via email.

OUT Routed

The number of outbound calls that were queued and then routed to agents for the day. If a call is routed to an agent more than once with the same service, it is counted multiple times.

SR

The percentage of interactions handled by the agent with dispositions indicating successful processing (dispositions of type *Success*) relative to all interactions handled by this agent. For more information about dispositions and their types, see section [Services and Campaigns - Dispositions tab](#).

Service name

The name of the service for the related metric. Display of the service name is helpful if you intend to show any service-level metrics to the agents of this team and if this team provides multiple services.

Note that due to a limited space allocated for the metrics on the Agent Desktop application, if the given team provides multiple services, metrics related to those services will be displayed for one service at a time.

TR

The percentage of interactions handled by all agents of the given team with dispositions indicating successful processing (dispositions of type *Success*) relative to all interactions handled by those agents. For more information about dispositions and their types, see section [Services and Campaigns - Dispositions tab](#).

Total Remaining

The total remaining records in active lists.

Roles

A role is a combination of privileges (i.e., permissions) that allow a user to access specific functionality within Bright Pattern Contact Center. Roles, therefore, define the type of work that users are allowed to do in the contact center. For example, in order to design call distribution scenarios, a user must have a role that has the *Manage Scenarios* privilege. A user may have any number of roles assigned simultaneously.
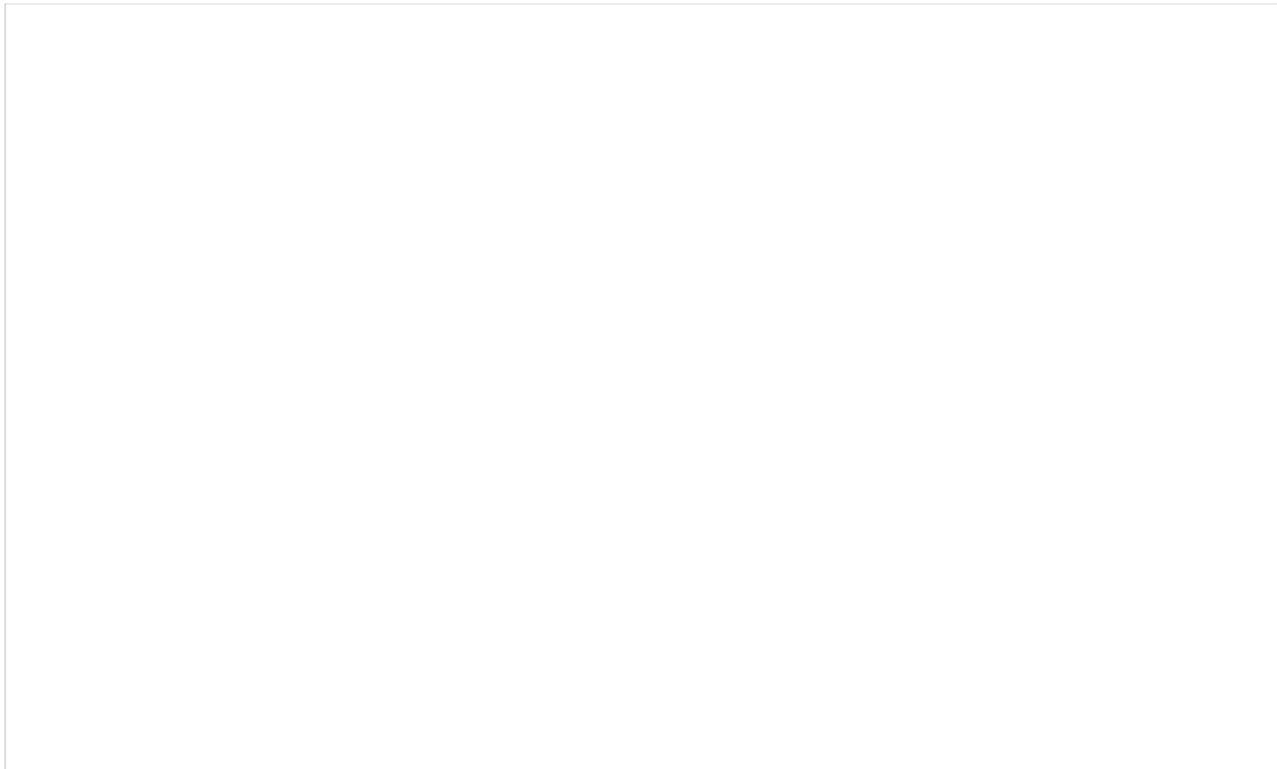
Users & Teams > Roles

Bright Pattern Contact Center provides a number of preconfigured roles that are available upon the initial solution installation. It is recommended that you review these roles first to see if they sufficiently reflect your contact center organization. If any changes are desired, you can modify the default privilege set of any preconfigured role, delete some of the preconfigured roles, and/or create some additional roles.

To work with roles, select the **Roles** option from the *Users & Teams* menu.

Screen Properties

Roles

The *Roles* screen properties are described as follows.

Name

Name is the role name. This name must be unique within the contact center.

Licenses

This property is reserved for future use.

Assign this role to newly created users

Assign this role to newly created users indicates whether the given role will be assigned automatically to every new user registered in your configuration. For example, if you want all or most of your users to be able to handle service interactions, you can select this property for the default role *Agent* and all new users automatically will get the corresponding permission. Remember that you can always remove a role assigned by default manually.

Privileges

This tab defines the privileges granted with this role. A privilege is permission to access specific functionality within Bright Pattern Contact Center.

Roles > Privileges

Note that there are two columns:

- **Has** defines whether users who have this privilege can access the corresponding functions.
- **May grant or revoke** defines whether users can assign roles containing such privileges to other users or to revoke them from other users.

For detailed descriptions of all privileges, see section [Privileges](#). Note that access to some functions may require a combination of privileges.

Note: The **BPO Client** group of privileges exists to support BPO call center operations, where BPO clients may want to have access to some system functions, such as quality monitoring. This access will be limited to the services that the BPO contact center handles for the given client. Any privilege in this group will be provided only with respect to the services where the corresponding user is assigned as a *reviewer*. For more information, see section [Services and Campaigns - Assignment Tab](#). If you assign a certain role to new users by default (see setting*Assign this role to newly created users*), you may have to remove that role explicitly from your BPO clients to prevent them from using system functions other than the ones implied by their BPO client role.

Users tab

The *List of users* shows all the users who currently have the selected role assigned to them. First name, last name, extension number, and team membership are displayed for each user. Double click a specific user row to manage [settings](#) of this user.

To assign the selected role to multiple users, click the**Assign users** button.
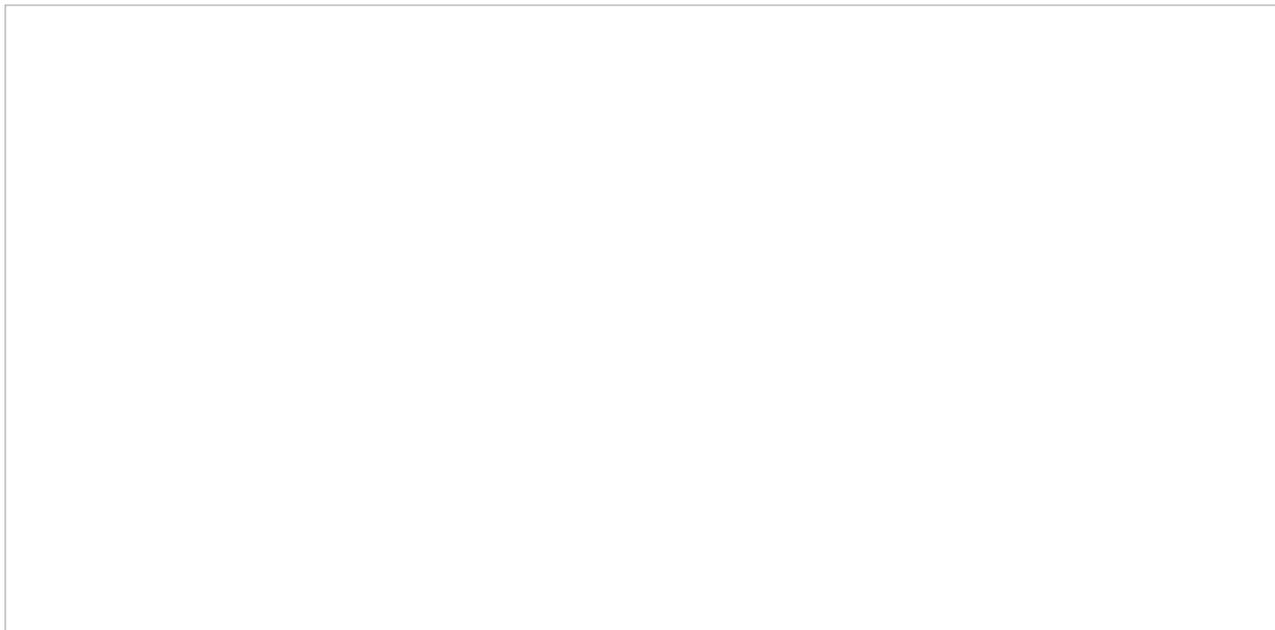
Roles > Users tab screen properties

Privileges

Registered users of your Bright Pattern Contact Center solution are assigned*privileges* that can be used to control access to various contact center functions. Privileges are arranged in the same way as they appear on the [Roles](#) page of the Contact Center Administrator application. For general information about privileges and roles, see section [Roles](#).

Privileges are organized into seven categories (i.e., groups):

- Interaction Handling

- Quality Management
- Security and Administration
- Service and Campaign Administration
- Supervision
- System Administration
- BPO Client

Note: Some service configuration changes that affect agent behavior are not picked up dynamically by Agent Desktop. Thus, after making a change to privileges, we recommend that all affected agents re-login to Agent Desktop.

Interaction Handling group

Access full-screen Agent Desktop

The *Access full-screen Agent Desktop* privilege allows the user to enable full-screen Agent Desktop view within CRM applications.

Because CRM systems typically have their own email and case management capabilities, the full-screen mode normally would be used by supervisors only.

Delete contacts

The *Delete contacts* privilege allows the deletion of contacts. If enabled, users can delete individual contacts via the Agent Desktop. When a contact is deleted, its activity history is deleted too. Cases are not deleted automatically.

Edit contacts

The *Edit contacts* privilege provides write access to contacts. If enabled, users can create new contacts, and users can modify any fields in existing contacts (but not activity history).

Force pop-out phone window

The *Force pop-out phone window* privilege allows the user to open Agent Desktop in a pop-out window. For more information, see section [Understanding Screen-Pop](#) of the *Agent Guide*.

Enabling this privilege is generally not recommended if you plan to deliver [activity forms](#) and/or other web content to agents via [screen pop](#).

Note that if the user has any privileges in the *Supervision* group (see below), the user will not be able to open Agent Desktop in a pop-out window even if the user has this privilege.

Handle automatically distributed interactions

The *Handle automatically distributed interactions* allows the user to receive calls from a service queue and preview records. This is the basic privilege that allows the user to perform typical call center agent work (i.e., provide services over the phone and participate in outbound campaigns).

The ability to handle customer chat or email interactions is controlled via separate privileges (see *Handle email* and *Handle service chat*).

Handle email

When enabled, the *Handle email* privilege allows users to:

- Edit cases
- Create new cases manually
- Open cases from search results (even if they are already open by other agent)
- Mark cases as spam

Handle service chats

With the *Handle service chats* privilege, the user may [handle chat interactions with customers](). This includes chat interactions started by customers via SMS.

Note that the ability to initiate a chat with a customer via SMS is controlled by a separate privilege (see*Initiate SMS conversation*). Likewise, the ability to use internal chat is controlled by a separate privilege (see*Send internal chats*).

Initiate SMS conversation

The *Initiate SMS conversation* privilege allows the user to [initiate chats with customers via SMS]().

Listen to call recordings and view chat transcripts on assigned services

With this privilege granted, the user may review [call recordings]() and [chat transcripts]() of the services that the user is qualified to handle (i.e., has corresponding [service skills]()).

Listening to own call recordings and view own chat transcripts

This privilege provides Agent Desktop users the capability, via activity history, to access recordings where the agent participated (at least partially). This privilege applies to Agent Desktop only.

Login to Agent Desktop

Login to Agent Desktop allows the user to log in to Agent Desktop application and perform basic back-office telephony functions. Any user who needs access to Agent Desktop must have this privilege. Note that this privilege alone is not sufficient for performing typical contact center agent work.

Note that any user who logs into Agent Desktop will be counted as a concurrent user for the duration of the login session. Your service provider may impose a limit on how many of your users may be logged on concurrently.

Make external calls

A user with the *Make external calls* privilege may make external calls and blind transfers to external destinations from the Agent Desktop application. If the user does not have this privilege, an attempt to make an external call or blind transfer will result in a text error message displayed on Agent Desktop.

Note that the absence of this privilege does not prevent users from making external calls using the dial pad of their hardphones.

Mask original email content

The *Mask original email content* privilege allows the user to mask fragments of original customer email text. For more information, see section [How to Mask Sensitive Data]() of the *Agent Guide*.

Modify own identification data

The *Modify own identification data* privilege allows the user to be able to modify specific fields of the user profile. If the privilege is not present, the following fields are locked:

- First Name
- Last Name
- Chat Nickname

See other agents/teams in directory

This privilege lets the user see all configured teams and team members in the Agent Desktop directory and view their current availability (presence). For more information, see section [How to Use the Directory](#) of the *Agent Guide*.

See other agents' cases

See other agents' cases allows the user to see cases handled by other agents. If the user does not have this privilege, the user will be able to see only cases that with which the user has worked. This privilege affects [case search](#) only. Absence of this privilege does not affect the user's ability to receive emails related to existing cases that the user has not worked on.

Send internal chats

The *Send internal chats* privilege allows the user to [initiate internal chat conversations](#).

Start recording of interactions

With this privilege, the user may [start call recording](#).

Stop recording of interactions

Stop recording of interactions allows the user to [stop call recording](#).

Transfer calls

The *Transfer calls* privilege allows the user to [transfer customer interactions to consultation parties](#) and [host conferences](#) (both via-consultation and single-step).

Absence of this privilege does not affect user's ability to

- make blind transfers of customer interactions
- transfer or conference internal calls

Use Calendar

The *Use Calendar* privilege enables users to use the Agent Desktop [calendar](#) for scheduling.

Use Favorites tab

Use Favorites tab is an agent-level privilege that controls whether the user can see and set favorites from the Agent Desktop application. This privilege is an agent behavior control to prevent users from dialing destinations that they should not based on FCC/TCPA and organizational rules.

Use Recent Calls tab

The *Use Recent Calls tab* privilege lets the user restrict access to recent calls. This privilege uses TCPA manual dialing to limit which agents can access recent calls.

Use RightNow

Use RightNow allows the user to use Agent Desktop embedded into the Oracle Service Cloud application (formerly called RightNow). This privilege enables access to the Agent Desktop widget within Oracle Service Cloud.

For more information, see the *[Oracle Service Cloud Integration Guide](#)*.

Use ServiceNow

Use ServiceNow allows the user to use Agent Desktop embedded into the ServiceNow application. This privilege enables access to the Agent Desktop widget within ServiceNow.

For more information, see the *[ServiceNow Integration Guide](#)*.

Use Zendesk

With the *Use Zendesk* privilege, the user may use Agent Desktop embedded into the Zendesk application. This privilege enables access to the Agent Desktop widget within Zendesk. To enable full-screen Agent Desktop view within Zendesk application, the user must also have the *Access full Agent Desktop* privilege.

For more information, see the *[Zendesk Integration Guide](#)*.

Quality Management

Accept/dispute evaluations of their interactions by others

Accept/dispute evaluations of their interactions by others allows the user to accept or dispute a quality management evaluation of herself.

Assign evaluations and calibrations

Assign evaluations and calibrations allows the user to assign quality management evaluations and calibrations to other users.

Confirm evaluations of supervised agents

Confirm evaluations of supervised agents allows the user to accept or dispute quality management evaluations of users with the Supervisor role.

Delete evals completed by anyone

Delete evals completed by anyone allows the user to delete evaluations of agents in the user's assigned team unless the privilege [Manage evaluations across teams](#) is enabled for the same user.

Delete evals completed by themselves

Delete evals completed by themselves allows the user to delete quality management evaluations completed by himself.

Edit evaluation forms

Edit evaluation forms allows the user to edit quality management evaluation forms in the [Evaluation Form Editor](#) application. Note that if a form is assigned to a service or campaign, to edit it, one needs either the [Manage all services and campaigns](#) privilege or the [Manage assigned services and campaigns](#) privilege to edit that service.

Edit public interaction searches

Edit public interaction searches allows the user to edit the public searches seen in the Agent Desktop application, section Quality Management > Eval Home.

Evaluate agent interactions

Evaluate agent interactions allows the user to evaluate agent interactions in the Agent Desktop application, section Quality Management.

Evaluate own interactions

Evaluate own interactions allows users to evaluate their own interactions and is assigned to agents by default; supervisors or evaluators are meant to confirm these evaluations. Note that these evaluations can be confirmed by a user's supervisor or a supervisor assigned to a user's team only.

Manage evaluations across teams

Manage evaluations across teams removes the restriction of only applying actions and accessing the quality management evaluations of the agents in the teams assigned to the user.

See evals of self

See evals of self allows the user to see quality management evaluations of herself as completed by other users.

Security Administration group

Can edit and erase interaction records

This privilege provides access to the manual erasure functions in accordance with PCI DSS 3.2 and GDPR requirements. With this privilege enabled, users will be able to edit and erase interaction records securely and manually in the event that another user has mistakenly included a customer's sensitive data in interaction content (e.g., call recording, chat, etc.).

This privilege is added to predefined Security Administrator and System Administrator roles.

Grant all privileges

Grant all privileges allows the user to grant any privilege, regardless of the user's *May grant or revoke* settings with respect to specific privileges. This is helpful during product upgrades where new privileges may be introduced.

Manage roles and security settings

With this privilege enabled, the user has full access to the following settings:

- Roles
- Security Policy
- System Access Restrictions
- Encryption Key Management

Service and Campaign Administration group

Configure reporting settings

With this privilege enabled, the user has full access to the following settings:

- [Report Templates](#)
- [Scheduled Reports](#)
- [Reporting Settings](#)

Configure system-wide settings

The *Configure system-wide settings* privilege gives the user full access to all pages of the following menus: *Tasks*, *Call Center Configuration*, and *Quality Management*.

For tasks, note that all users who have the *Configure system-wide settings* privilege enabled will receive an email notification each time a scheduled task fails.

Control campaign operations

Control campaign operations enables the user to [view and control assigned campaigns](#) via Agent Desktop.

A user must have this privilege in order to be available for selection as a service/campaign operator via the *Services and Campaigns > Assignments* page. In the Agent Desktop application, access will be limited to campaigns where the user is assigned as an operator.

If this privilege is revoked from a user, the user's name will appear in red color in the list of operators of any services/campaigns that the user may have been previously assigned to operate.

Edit knowledge base

The *Edit knowledge base* privilege gives the user full access to the [Knowledge Base](#) via the Contact Center Administrator application. It also allows the user to create articles in the *Knowledge Base* via the Agent Desktop application.

Note that access to the *Knowledge Base* via the Agent Desktop application is provided in the context of the services that the user can handle.

Manage all services and campaigns

The *Manage all services and campaigns* privilege allows the user to configure all existing services campaigns regardless of whether the user is assigned to them as an administrator. Note that in order to [assign teams to campaigns](#), the user must also have the *Manage teams* privilege.

Another privilege exists to enable the user to access only assigned services campaigns (see below). Note that in order to prevent the user from creating new services and campaigns, both these privileges must be disabled.

Manage assigned services and campaigns

With this privilege, the user has full access to configuration of the services and campaigns that the user is assigned to as an administrator. For more information, see section [Services and Campaigns - Assignments Tab](#).

Note that in order to assign teams to a service/campaign, the user must also have the *Manage teams* privilege.

Another privilege exists to enable the user to access all configured campaigns regardless of assignment (see above). Note that in order to prevent the user from creating new campaigns, both these privileges must be disabled.

Manage lists

The *Manage lists* privilege gives the user full access to calling lists and do-not-call (DNC) lists. Absence of this privilege does not affect the user's ability to associate existing lists with campaigns.

Manage scenarios

The *Manage scenarios* privilege allows the user to create, view, and edit scenarios. Absence of this privilege does not affect the user's ability to configure scenario entries and associate such entries with existing scenarios.

Manage skills

With the *Manage skills* privilege, the user may create and edit existing auxiliary skills and assign skills to agents with specific levels.

Use SMS/MMS API

This privilege allows the user to use the SMS/MMS API to send and receive SMS/MMS messages. Note that in addition to granting this privilege, the contact center administrator also must create a role, a user with the *Use SMS/MMS API* property, and generate an API key.

Supervision group

Access Real-time Stats API

The *Access Real-time Stats API* privilege gives the user access to applications that are connected to Bright Pattern Contact Center via the Real-time Stats API; this includes viewing the wallboard application. **Note**: The availability of data on the Agent Desktop Home Screen is not affected by this privilege, with the exception of the wallboard icon.

All assigned teams combined view

When enabled, this privilege will show, on the supervisor's home screen, the agents from all teams assigned to the logged in supervisor, specifically with the following metrics:

- State
- Time in State
- Not Ready Reason (if not ready for a reason)
- Team (new metric)
- Active interactions

It shows all services that are the teams are assigned to (individual services can be hidden if needed), specifically the following metrics:

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

Can see contents of email push queues

This privilege allows supervisors of teams with the push distribution method enabled to view push queues. Push queue items appear in team queues when the "All Services with Push Queues" option is selected; however, it is possible to select only one service and see only its queue.

While looking at a push queue, a supervisor can:

- Sort the queue as they like (i.e., using existing pull queue sort controls)
- Assign an item to an agent
- Assign one or more items to another queue and skill requirement
- Open an item to work with
- Delete an item or mark it as spam

Note that this setting is not assigned to any roles by default.

Can update final dispositions

This privilege enables users to update dispositions when final. A final disposition can be updated in the interaction record by clicking the Change Disposition ⬜ button.
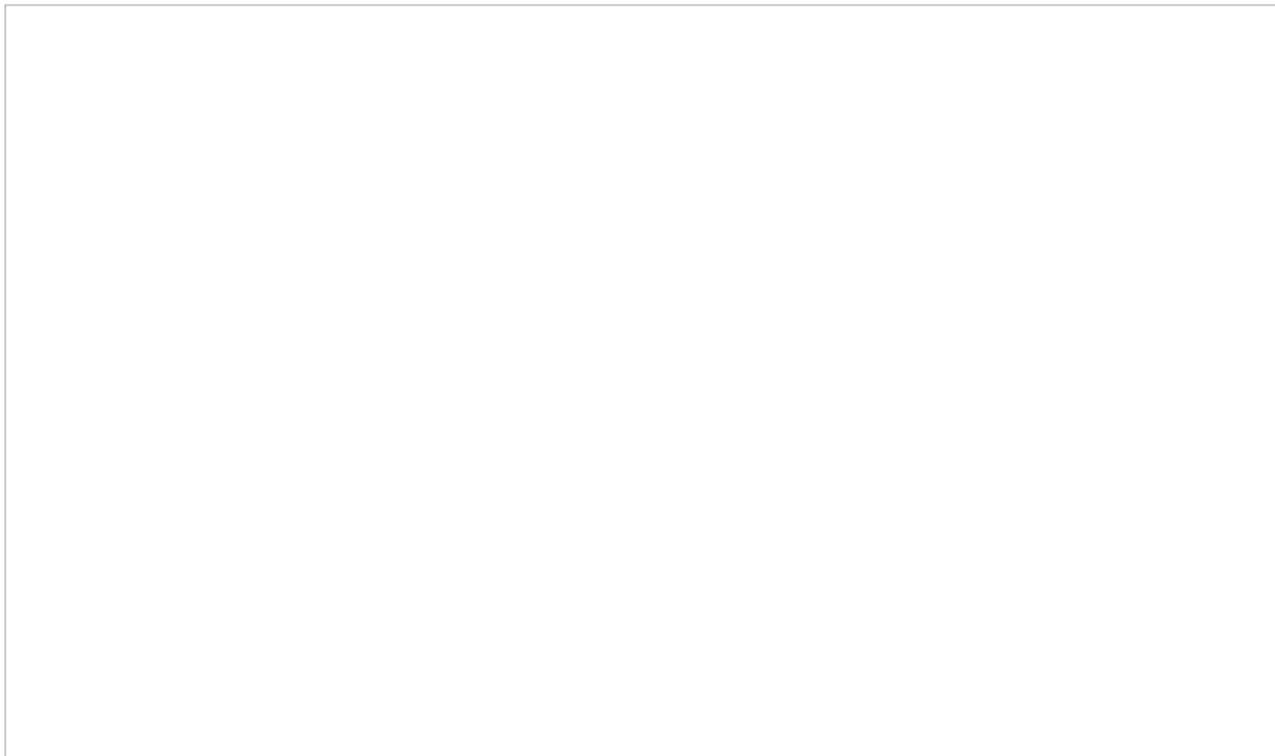
Changing final disposition in Interaction Records Search Results record

For more information about interaction records, see section [Interaction Records Search](#) and [Search Results](#).

Can use agent seat maps

This privilege provides users access to the Agent Seating Map application; it is required for creating and editing agent seating maps. For more information, see the [*Agent Seating Map Guide*](#).

Change alert configuration

Users with the *Change alert configuration* privilege may enable/disable [alerts](#) available for some real-time metric displayed via Agent Desktop, change their appearance, and modify threshold values that trigger such alerts.

Note that the ability to set configured alerts as system-wide defaults is controlled via a separate privilege (see*Set alerts for real-time metrics system-wide*).

If the user does not have this privilege, the Alert Configuration dialog of the Agent Desktop will provide read-only information about the current alert configuration.

Change real-time metric views

The *Change real-time metric views* privilege allows the user to add metrics to, and remove them from, any [real-time metric views](#) of the Agent Desktop application. The user may also change the order in which the metrics appear in the table views.

Absence of this privilege does not affect the user's ability to add services and campaigns to, and remove them from, real-time metric views.

Note that the ability to set created real-time metric views as system-wide defaults is controlled via a separate privilege (see *Set real-time metric views system-wide*).

Customize Wallboards

The *Customize Wallboards* privilege allows additional elements to appear on the user's wallboard. These elements include title, selector, flip arrows, and menu. Using these elements, users can customize the look and display of their Agent Desktop wallboard. Using the Wallboard Layout Editor, cards and cells can be added, deleted, scaled, and expanded using mouseovers, click-and-drag, and drag-and-drop movements.

Define/View subteams of selected agents

The privilege *Define/View subteams of selected agents* enables subteam controls to be displayed in Agent Desktop and the Reports portal. In addition, the privilege allows users to switch between them. Subteams are smaller groups of agents that supervisors have selected from full teams.

Delete cases

The *Delete cases* privilege allows the deletion of cases. If enabled, users can delete individual cases via the Agent Desktop. When a case is deleted, all interactions related to a case are deleted.

Download recordings and transcripts

With this privilege, the user may download [call/screen recordings](#), [chat transcripts](#), and [email messages](#) from the interaction search and review pages of the Contact Center Administrator application.

Force agent states

The *Force agent states* privilege allows the user to [change current agent states](#) of members of any team that the user is assigned to supervise.

Listen to recordings linked to external CRM records

This privilege allows the user to listen to call recordings linked to activity history in the CRM records.

Listening to all call recordings and view all chat transcripts

With *Listening to all call recordings and view all chat transcripts*, the user may [review voice recordings and chat transcripts](#) via the Contact Center Administrator application.

Absence of this privilege does not affect the user's ability to review screen recordings in the [Agent Timeline](#) or email messages in the [Interaction Search](#).

When removing this privilege from a user, make sure this user also does not have the privilege*Listen to call recordings and view chat transcripts for assigned services* in the *BPO Client* group (see below).

Manage canned chat responses system-wide

The *Manage canned chat responses system-wide* privilege allows the user to make canned chat responses available to all other agents of the contact center. For more information, see section [How to Create and Edit Canned Chat Responses](#) of the *Agent Guide*.

Monitor agent screen

When enabled, the *Monitor agent screen* privilege allows the user to view and monitor the screens of a selected agent that the user is assigned to supervise.

Monitor interactions

The *Monitor interactions* privilege allows the user to connect to calls handled by agents that the user is assigned to supervise in [silent monitoring, coaching, and barge-in modes](#). For more information, see section *Call Monitoring, Coaching and Barge-In* of the *Supervisor Guide*.

Pull screen pop

Pull screen pop allows the user to [get snapshots of the *Context Information Area*](#) of the desktops of agents that the user is assigned to supervise. Note that in order to be able to get a snapshot, the user must be connected to the agent in one of the call monitoring modes. Thus, the user also must have the privilege *Monitor interactions* (see above).

Push/Pull Global Wallboards

Users with the privilege*Push/Pull Global Wallboards* can push their personal wallboards to other users and/or teams, as well as pull shared wallboards from a global pool. Note that only global wallboards can be pulled.

Set alerts for real-time metrics system-wide

This privilege allows the user to[set alerts](#) that the user configures as system-wide defaults. Note that in order to use this privilege, the user must also have privilege *Change alert configuration*.

Set real-time metric views system wide

Set real-time metric views system wide allows the user to set real-time metric views that the user configures as system-wide defaults. Note that in order to use this privilege, the user must also have the privilege *Change real-time metric views*.

For more information, see section [Customization of Metric Views](#) of the *Supervisor Guide*.

View historical reports

The *View historical reports* privilege allows the user to[generate and view reports](#) via the Contact Center Administrator application. Absence of this privilege does not affect the user's ability to access any of the general reporting settings or be a recipient of emailed scheduled reports.

View interaction records

With this privilege, the user may [search for and review interaction records](#) via the Contact Center Administrator application.

Absence of this privilege does not affect the user's ability to generate and view the [Call Detail Report](#) or [Email Detail Report](#). To prevent access to these reports, use privilege *View historical reports* (see above).

View real-time agent metrics

View real-time agent metrics allows the user to [view real-time metrics for the agents](#) of the teams that the user is assigned to supervise.

View real-time service metrics

With *View real-time service metrics*, the user may [view real-time metrics for all services](#) associated with the teams that the user is assigned to supervise.

Absence of this privilege does not affect the user's ability to [view campaign-specific metrics](#). To prevent access to these metrics, use privilege *Control campaign operations* (see above).

Watch agent screen recordings

The privilege *Watch agent screen recordings* allows supervisors to search for and view the screen recording sessions of agents on their teams. The screen recordings appear in interaction records in agent timeline searches. If a screen recording is available for the selected agent, and if the privilege is enabled, then the *Watch screen recording* button is shown to the supervisor.

System Administration group

Privileges associated with system administration are described as follows.

Allow recording export API access

This privilege allows users to access the [Interaction Content API](#) that retrieves call recordings and metadata based on the call identifier.

Bulk Export/Import Contacts

When enabled, the privilege *Bulk Export/Import Contacts* allows the export/import icon on the Agent Desktop Contacts screen to be shown.

Bypass Single Sign-On

Users with this privilege can log in to any Bright Pattern application (e.g., Contact Center Administrator, Agent Desktop, etc.) via a direct authentication method (i.e., with Bright Pattern username and password), even if a corporate-level single sign-on (SSO) is configured for the given contact center.

Users without the privilege should not be able to log in with their Bright Pattern credentials when SSO is enabled; they should, however, be able to log in when it is disabled. By default, this privilege is enabled only for the pre-defined System Administrator role.

If SSO is configured for a contact center, users with this privilege can bypass single sign-on by using special URLs that take the following form:

https://<tenant.domain.com>/admin/?bypass-sso=1

https://<tenant.domain.com>/agentdesktop/?bypass-sso=1

Configure Contact Forms and fields

The *Configure Contact Forms and field* privilege allows users to edit contact, activity history, and augmentation and case forms.

Configure directory

The *Configure directory* privilege allows the user to [create and modify external contacts](#) that appear in the [Directory](#) of the Agent Desktop application.

Manage BPO Clients

When enabled, the *Manage BPO Clients* privilege allows users to:

- Create, edit, and delete BPO clients in the Contact Center Administrator application
- Assign forms and teams to BPO clients

Manage all teams

If granted the *Manage all teams* privilege, the user may

- create teams and change configuration of all existing users and teams
- create users and change configuration of existing users, provided that the user also has the *Manage users* privilege (see below)
- assign skills to, and change skill levels of, all existing agents, provided that the user also has the *Manage skills* privilege (see above)

For more information, see sections [Users](#), [Teams](#), and [Skill Levels](#).

Note that if a user is assigned as a supervisor of a particular team, the absence of this privilege does not affect the user's ability to change most of the configuration settings of the given team and its current members.

Manage phones

The *Manage phones* privilege gives the user full access to configuration of [softphones](#), [hardphones](#), [access numbers](#), and [scenario entries](#). Absence of this privilege does not affect the user's ability to assign phone numbers to users.

Manage users

The *Manage users* privilege allows the user to create [users](#) and change the configuration of existing users within the team he is part of or that he is a supervisor of.

Privileged Access IP Range

The *Privileged Access IP Range* privilege allows users (e.g., administrators) to be able to log in to the system from any IP address (e.g., a public place such as a coffee shop). Without this privilege, users can only log in from specific IP addresses.

Publish help

Publish help gives the user full access to configuring [help screens](#).

View audit log

With the *View audit log* privilege, the user can view the [audit log](#).

View usage data

The *View usage data* privilege allows the user to access to reports about usage of telecom carriers' resources via *Contact Center Administrator > Reports > Usage.*

BPO Client group

Listening to call recordings and view chat transcripts on services in reviewer role

With this privilege granted, the user may listen to [call recordings](#) and view [chat transcripts](#) of the services to which the user is assigned as a [reviewer](#).

Skill Levels

In Bright Pattern Contact Center, skills assigned to an agent with certain proficiency levels define the types of customer interactions that the agent is able to handle. Before skills can be assigned to an agent, they must be defined in your contact center configuration.

Defining Skills

There are three different ways to define skills in Bright Pattern Contact Center, as well as three corresponding methods to assign such skills to agents.

With the first method, when you create your services, a *default service skill* representing qualification to provide the corresponding service is created automatically. When you [assign a service to an agent team](#), you will have an option to assign this default service skill to all members of this team with a specific level. If you select this option, all current and future members of the team will get the service skill automatically. Note that the individual skill levels can be changed manually later.

With the second method, skills are created independently of services. Such *auxiliary skills* are organized in groups and can be used in combination with the default service skills (see above) to identify the most qualified agents to handle a specific interaction. For example, an auxiliary "IT" skill can be used with the default service skill for technical support; this connects "IT" skilled agents with customers inquiring about this topic. Auxiliary skills are assigned to agents manually. For more information, see section [Auxiliary Skills](#).

For the third method, language skills are assigned to agents. *Language Skills* are selected from a pre-configured list and also can be used in combination with the default service skills; this is used to identify the most qualified agents to handle an interaction in a specific language. For example, a "Spanish" language skill can be used with the default service skill for technical support, and then provide support in Spanish to the customer. Language skills are assigned to agents manually. **Please note**: In previous versions of Bright Pattern Contact Center, languages could be configured in *Auxiliary Skills*. If you configured languages previously, they will be displayed in *Auxiliary Skills* as "Language - Old." For more information, see section [Language Skills](#).

Understanding Skill Assignments

To view and change assigned agent skills, select the **Skill Levels** option from the *Users & Teams* menu.
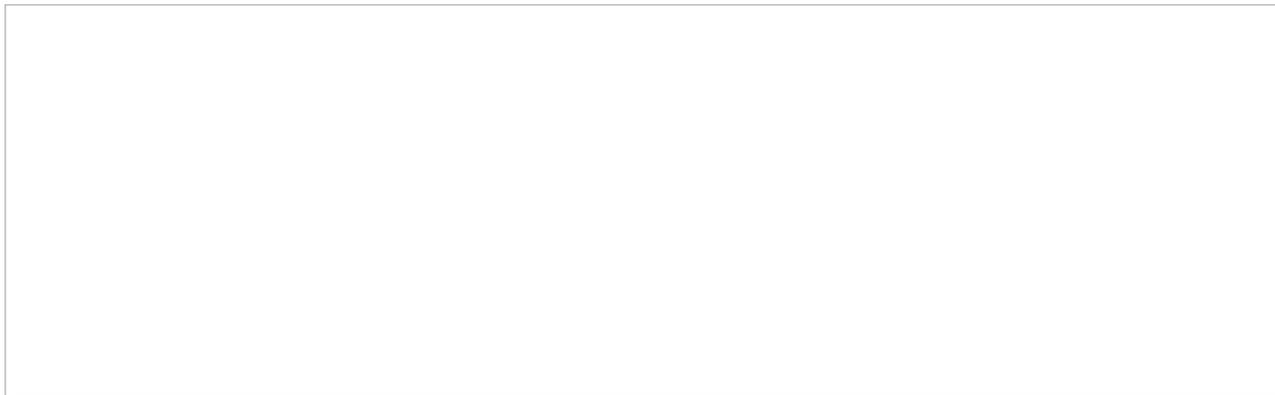

Users & Teams > Skill Levels

The list that appears will contain all users of your contact center. You can limit the view to members of one or several specific teams by selecting those teams from the drop-down menu above the list. For each user, information about his team membership and assigned roles will be displayed.

The other columns of the list represent your contact center skills arranged according to their groups. The default service skills will be arranged under the group **Services**. Note that when you limit the list view to show the members of a specific team, only the default skills of the services associated with this team will be displayed.

To focus on the particular skills whose assignments you wish to view and modify, click the **Skill columns** button and deselect the skills that you do not wish to work with right now. **Please note**: The modifiable user skill columns shown here are auxiliary skills; the view of languages columns cannot be modified. To edit either auxiliary or language skills, click on the corresponding links located here.
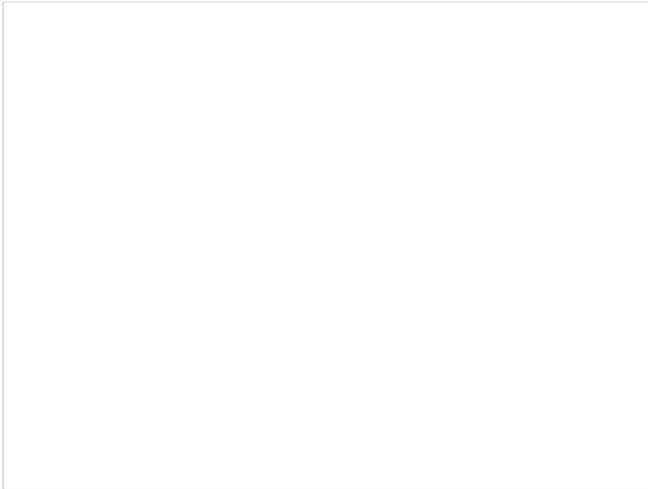
Show or hide user skill columns by selecting checkboxes

Numeric Values

The numeric values in the skill columns define the relative levels of proficiency in the given skill for the agents in the corresponding rows. Absence of any skill level value in a specific skill column for a specific agent means that the agent does not possess the given skill at all. Note that for default service skills, the skill levels will usually contain a certain default value specified at the time when the corresponding service became associated with the agent team. For auxiliary skills, levels will be initially absent and must be specified manually.

To assign a skill to an agent, click the corresponding skill level cell, specify the desired value, and press the Enter key. The value must be an integer within the 0 to 100 range. Best practice is to set skills at intervals of 25 (e.g., 100, 75, 50). What this will do is cause the service scenario to find an agent with a skill level of 100 first, then 75, then 50, and so forth. The higher-skilled agents will get the messages before the lower-skilled agents, and the agents with no skill will not be served.

Use the same operation to change the levels of the existing agent skills. Deleting an existing value or setting it to 0 means that the user will no longer possess the corresponding skill.

You can change any number of skill levels for any number of agents while in the *Skill Levels* screen. All cells with updated values will be highlighted with a red mark in the upper left corner. Click **Apply** to store the new values in the configuration.

Training Classes

Training Classes, a feature of the Omni QM module, allows you to create training classes (i.e., in name only) that reflect actual training an agent has received or classes an agent actively attends in real life. Training Class is defined per user in section Users > Person tab and is used as an optional search parameter in select QM Reports.

As a report parameter, Training Classes allows you to analyze a given class by comparing it against other report data; if performance is lacking in a particular class, quality evaluators can adjust training as necessary.

For more information about Omni QM, contact your service provider.
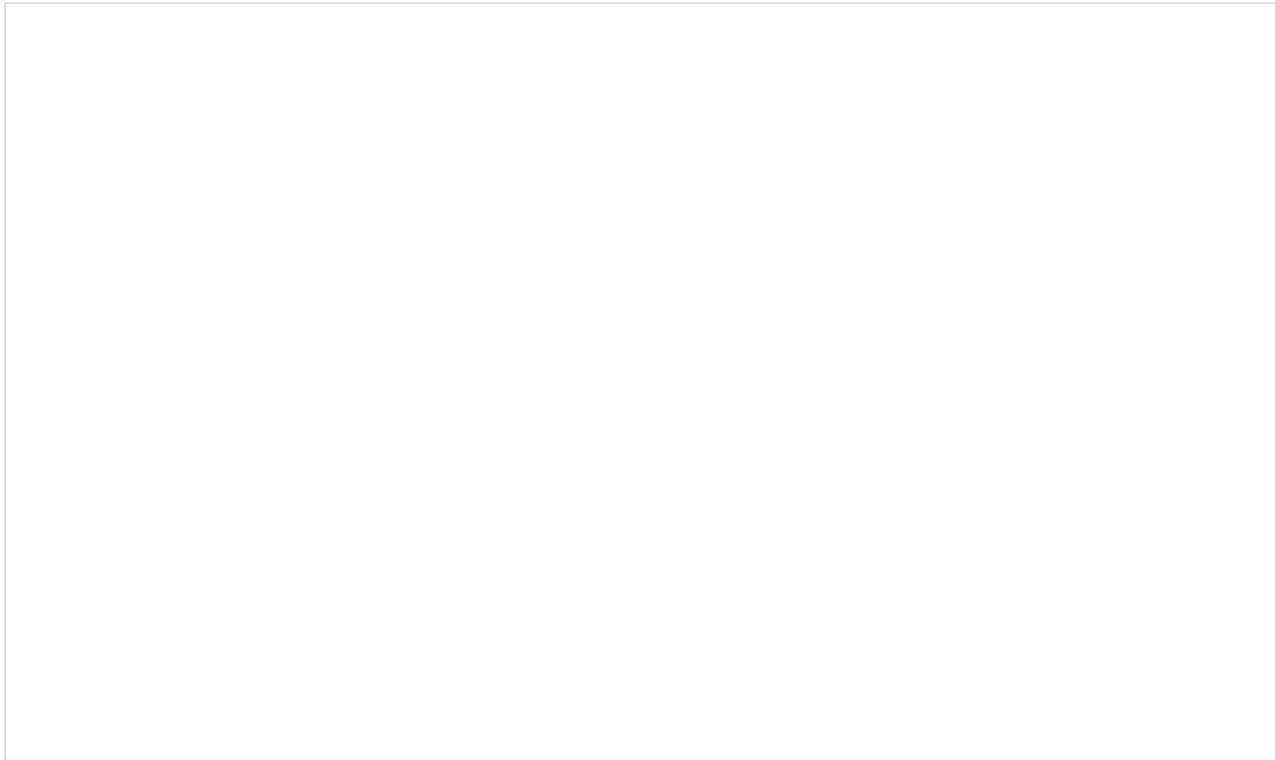
Users & Teams > Training Classes

Help Screens

Bright Pattern Contact Center allows you to define the content of the *Help* screen that users of the Contact Center Administrator and Agent Desktop applications will see when they click the help icon in the upper-right corner of the application screens. Help screens can contain multiple help items and can be customized for each [role](#) you have defined for your contact center. A help item is usually a link to a web resource that provides information relevant to the person in the given role. For example, a link can point to a published user guide, a *Knowledge Base* article, or a documented customer service procedure. Phone numbers and email addresses can also be defined as help items. Items related to the same knowledge domain are arranged in sections, and these sections can be displayed or hidden depending on the role and/or team assignment of the user who will view the help screen.

To work with help screens, select the **Help Screens** option from the *Users & Teams* menu. Note that you must have the privilege *Publish help* in order to see this option and edit help screens.
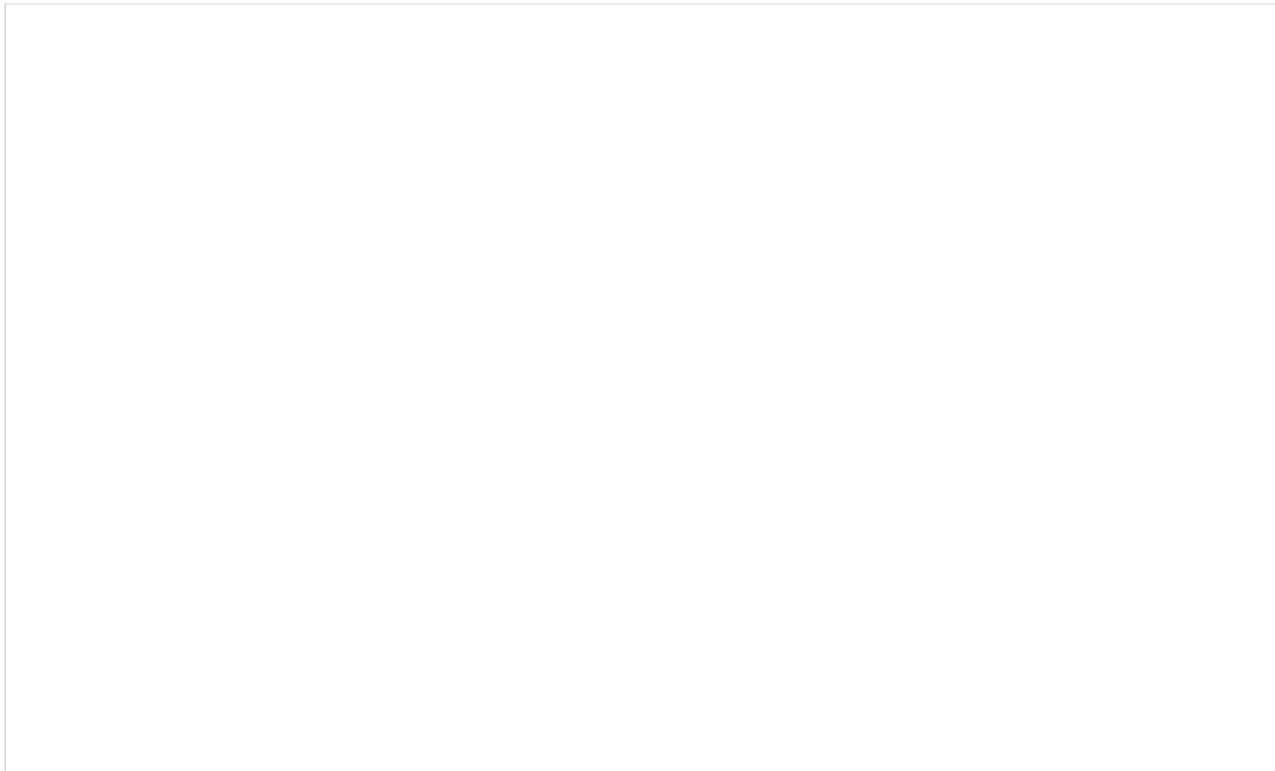
Users & Roles > Help Screens

When you open the Contact Center Administrator application for the first time, you will see some pre-defined content of the help screen provided to you as an example. Use the *Application* drop-down menu to work with the help screen content of the user-facing application of the desired type. By default, you will see sections and items for all roles and all teams. To see the content available to a specific user role, select the desired role from the **View As** drop-down menu. To see the content available to members of a particular team, select the desired team from the **Teams** drop-down menu.

- To add a new section, click **add section**, provide the section title and, if necessary, re-define the intended audience (roles and teams) for the content of this section. If the content applies to all roles/teams, select **All**.
- To add a help item to the section, click **add item**, provide the item title, select its type (URL, phone, or email), and specify the value.
- To edit or delete existing sections and help items, hover over the corresponding titles.