5.3 Users

Bright Pattern Documentation

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Purpose

The Bright Pattern Contact Center *Supervisor Guide* focuses exclusively on using the Agent Desktop application to perform supervisory tasks such as agent supervision, campaign management tasks, real-time monitoring of key contact center performance indicators and helping agents with call handling. The guide also explains tasks related to real-time campaign management. Note that the same application is also used by contact center agents to provide customer service over the phone. For descriptions of all tasks related to customer service, see the Bright Pattern Contact Center *Agent Guide*.

1. REDIRECT 5.3:Contact-center-administrator-guide/Appendices/AgentDesktopHelperApplication

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Report Generation

When you select option **Reports** from the menu on the left, the application pane will display the list of available reports. By default, these are the predefined reports supplied with Bright Pattern Contact Center. If you have previously created some custom reports using Jaspersoft Studio and uploaded their definitions into the system, such custom reports will also appear in the list of reports. For more information about stock and custom report definitions, see section Report Templates of the *Contact Center Administrator Guide*.

Reports overview

The reports are grouped by the type of contact center resources that they describe. Within each group, the reports are listed in alphabetical order according to the names of the corresponding report definitions. A description is provided for each report. If a description does not fit on the screen, hover over it to see the full text of the description in a tooltip box.

Select the desired type of report from the list. In the view that appears, use the report generation filters to select the resource for which you want to generate the report and to specify the reporting interval. Depending on the report type, you can select multiple resources and apply additional filters.

Report generation filters

Agent Selection Options

For reports where the agent drop-down selector is present, please note the following:

- The selection of multiple agents is available for the following reports:
  - Agent Activity

    - Agent Activity (CSV)
    - Agent Email
    - Agent Login/Logout
    - Agent Performance
    - Internal Chats
    - Intra-Team by Service
    - Intra-Team Performance

- Agent names are listed alphabetically in the drop-down selector; depending on your center's configured display name format, this will be by first or last name.
    - Depending on your center's configured name display, you may search for a specific agent by typing out the first letters of their name.

An example of searching for agent names starting with the letter "L"

- Agents that have been inactive for more than 30 days will be excluded from the drop-down selector; agents that had activity within 30 days before the search period will have their names displayed as grey, italicized text.

Agent names displayed as grey, italicized text indicates activity recent to the search period but not within the period

- Additionally, you may select the **Show disabled/deleted agents** checkbox from the drop-down menu to automatically include disabled and/or deleted agents from the report; the inclusion works even if agents had activity within the report's timeframe.

How to Clone Reports

To create a copy of a report, click the **Clone** button.

Clone

The report you clone can be found in the list of available reports under *Clone of Report Name*; from here you may rename and customize the report.

Clone of ...

How to Delete Cloned Reports

To delete a cloned report from the list of all reports, click the **Delete** button. Note that it is possible to delete cloned reports only. The selected report will be deleted from the full list of reports available for your contact center.

Delete

How to Rename Reports

To rename a report, click the **Rename** buttton; a dialog window will pop where you will enter the report's new name. The selected report will display the new name and will be available from the full list of reports available for your contact center.

Rename

How to Run Reports

To generate the report, click the **Run Report** button at the bottom of the report details pane. Report generation may take a few moments.

Run Report

The report will appear in a separate browser tab/window and occupy the entire available browser window space. Thus, you can have multiple reports open in your browser at the same time. Generated reports will continue to be available for viewing even when you close the Contact Center Administrator application. Depending on the amount of data, the generated report may occupy more than one page.

The generated report opens in a new browser tab/window

How to View and Use the Generated Report

The generated report appears as a static table of data within your browser tab/window. Usable links for navigation and export are located at the top of the page. If you export the report to a format such as .XLS, you can filter, sort, and reformat the data just as you would for any other spreadsheet.

Navigation

To navigate through the contents of the report, use the page navigation arrows or enter the page number you wish to view.

Metrics

To learn more about the metrics provided by each report, see sections Detail Reports and Aggregate Reports.

Exporting Reports

To export the generated report, choose the format (PDF, XLS, CSV, or TXT), and click the corresponding link.

Running the Report Again

To run the same report for a different resource and/or different reporting interval, simply change the filter setting and click the **Run Report** button again.

Going Back to Reports

To return to the list of reports, go back to the Contact Center Administrator application, section Reports, in your other browser tab or window.

How to Customize Reports

To customize the presentation of the report, click the **Customize** button.

Click Customize

The report will be opened in a new browser tab or window in the *Report Customizer* application.

Using the Report Customizer application to customize columns and report contents

This web application allows you to do the following:

- Click and drag columns onto different places on the report

Changing-Column-Placement-50.png

- Adjust the width of columns by clicking and dragging the column borders

Adjusting-Column-Width-50.png

- Remove columns by dragging them to the margin of the report

Removing-Columns-Report-50.png

- Add columns by dragging them from the margin of the report to the main screen of the report

Adding-Column-Reports-50.png

- Rename columns by clicking into the column title

Renaming-Columns-50.png

- Search the report columns for specific keywords
  Search-Available-Columns-50.png

- Save your customized report with a new name and description
  Save-Customized-Report-50.png

Other Actions

- To view available charts for the report, select the **show charts** checkbox.
- To save your customized report, click **OK**.

- To cancel customization and exit the Report Customizer, click **Cancel**.

Scheduling Reports

You can also schedule automatic generation of reports and their delivery to specified destinations as email attachments or via FTP. For more information, see Scheduling Reports.

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Scheduling Reports

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API Reference

Bright Pattern uses Postman to host documentation for Bright Pattern Contact Center REST APIs.

Postman is a popular REST API client for testing and documenting APIs with examples in multiple programming languages. To view documentation hosted on Postman, simply click the **Get APIs** button for the desired API specification, and you will be redirected to Postman's website. From there, you have the option to run the API collection in the Postman application in your own environment.

Note that JavaScript API documentation is available only on help.brightpattern.com (see the links shown on this page).

Agent Desktop APIs

Access Agent Desktop functions using JavaScript; control agent states and handle calls from .NET-based applications.

Get APIs

- Desktop Integration API .NET Version Tutorial
- Simplified Desktop .NET API Specification
- Desktop JavaScript API Specification

Configuration API

Automate user provisioning with third-party systems using the Configuration API.

Get APIs

- Configuration API (on Postman)

Embedded Desktop API

The Embedded Agent Desktop API allows you to use Agent Desktop directly from your webpage.

Get APIs

- Embedded Agent Desktop API

Interaction Content API

Download recording audio files along with their associated metadata with the Interaction Content API.

Get APIs

- Interaction Content API (on Postman)

List Management API

Manage the contents of outbound calling lists and Do Not Call lists via third-party applications.

Get APIs

- List Management API (on Postman)

Chat/Mobile App APIs

Develop customer-facing mobile/web apps for advanced chat, voice, and video communications.

Get APIs

- Mobile API Plug-in for Appery.io Tutorial
- Mobile/Web API (on Postman)

SCIM-Compliant User Provisioning API

Communicate user identity data between identity providers and service providers.

Get APIs

- SCIM-Compliant User Provisioning API Specification (on Postman)

SMS/MMS API

Send and receive SMS and MMS messages, as well as track delivery status with the SMS/MMS API.

Get APIs

- SMS/MMS API Specification (on Postman)

Statistics API

Work with subscriptions, real-time statistics, dispositions, and more with the Real-Time Statistics API.

Get APIs

- Real-Time Statistics API (on Postman)
- List of Statistics

1. REDIRECT 5.3:Contact-center-administrator-guide/Security/SecurityPolicy

1. REDIRECT 5.3:Contact-center-administrator-guide/Security/SecurityPolicy

1. REDIRECT 5.3:Contact-center-administrator-guide/Security/SecurityPolicy

1. REDIRECT 5.3:Contact-center-administrator-guide/UsersandTeams/Teams

1. REDIRECT 5.3:Contact-center-administrator-guide/UsersandTeams/SkillLevels

About Omni QM

Bright Pattern Contact Center Omni QM is a suite of advanced quality management tools designed to facilitate the process of assessing and improving the quality of agent communications across media channels.

Omni QM builds upon Bright Pattern's existing quality management functionality by introducing advanced quality management features, such as the ability to design evaluation forms, determine an evaluation process, have agents conduct self-evaluations, assign agent score, conduct calibrations for the purpose of improving the evaluation process, and much more.

In addition, Omni QM unifies quality management processes by placing all quality management features into a single application. When Omni QM is enabled, all interaction records, interaction search functions, evaluation forms, and other quality management tools are accessed via an evaluation console built into the Agent Desktop application. This means that supervisors no longer have to visit the Contact Center Administrator application to access interaction records and grade them; instead, supervisors can monitor, search, review, and evaluate their team's interactions without ever leaving Agent Desktop. Moreover, agents can easily view their own interactions, evaluations, and quality score from Agent Desktop. Omni QM gives users a bird's eye view of interaction quality across all channels and services.

Omni QM is a feature option that is built in to Bright Pattern Contact Center, enabled as part of your organization's contract.

What Is Quality and Quality Management?

In the contact center space, where customer satisfaction determines the success of customer service, we can define *quality* as consistency in customer service delivery, communications, knowledge of product/service, employee performance, technology, and resources.

Customers expect to receive the same level of care from any agent they interact with and on any channel in which they reached your business. We can meet this expectation for consistency by using quality management processes and tools.

Quality management helps contact centers to meet customer requirements, make all efforts to exceed customer expectations, facilitate agent development, ensure consistency of quality of provided services, and provide a path to achieve it all.

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1. REDIRECT [5.3:Contact-center-administrator-guide/QualityManagement/CallRecording]

1. REDIRECT [5.3:Contact-center-administrator-guide/UsersandTeams/Roles]

1. REDIRECT [5.3:Agent-guide/Setup/UserProfile]

1. REDIRECT [5.3:Agent-guide/UserInterface]

Omni-Channel Routing

Bright Pattern Contact Center enables contact center agents to handle multiple interactions of different media types simultaneously. The agent's availability to handle an interaction is determined via a capacity model that takes into account how much of the agent's capacity is occupied by interactions of various media types that the agent is already handling, how much spare capacity the agent must have to be able to handle an interaction of a specific media type, and relative priorities of various media types.

To configure agent capacity, select the **Omni-Channel Routing** option from the **Call Center Configuration** menu.

Call Center Configuration > Omni-Channel Routing

Screen Properties

The *Omni-Channel Routing* screen properties are described as follows.

Capacity share taken by each interaction

This setting specifies the percentage of total agent capacity occupied by a single interaction of the given media type.

In the default settings shown, the capacity share is:

- Voice: 100%
- Preview: 100%

- Chat: 25%
- Email: 25%

Using those capacity share settings as an example, an agent handling a single call will be 100% busy, while an agent handling a single chat session will have 75% spare capacity (i.e., 100% – 25% = 75%).

For multimedia interactions such as rich contact, the total capacity share is the sum of capacity shares of all media types involved.

Required spare capacity to receive interaction

This setting specifies the percentage of spare capacity that the agents must have to be delivered an interaction of the given media type.

In the default settings shown, the required spare capacity is:

- Voice: 50%
- Preview: 50%
- Chat: 25%
- Email: 100%

Using those required spare capacity settings as an example, an agent handling three service chats may still receive another chat, but not email because the agent's spare capacity of 100% is only sufficient for the agent to get one more chat.

Precedence

Precedence is the order in which interactions of the given media type will be distributed to agents relative to interactions of the other media types (i.e., when competing for the same available agent).

In the default settings shown, the precedence is:

- Voice: 1
- Preview: 4
- Chat: 2
- Email: 3

Using those precedence settings as an example, if an agent becomes simultaneously available for a chat and an email interaction waiting in queue, the chat interaction will be delivered to that agent first, regardless of how long either of those interactions has been waiting in queue.

This parameter can be set to the same value only for voice and chat. If it is set to the same value, the delivery order of voice and chat interactions will be determined by only their position in queue. Generally, it is recommended that each media type has a different precedence value.

How the System Routes Interactions

When a new interaction arrives and its skill requirements are identified, the system will look for agents with matching skills and sufficient spare capacity (i.e., occupied at less than 100 – *Required spare capacity to receive interaction* of the given media type).

If multiple agents satisfying these conditions are found, the system will select one of these agents using the following criteria in the specified order:

1. The agent with the highest skill level(s); the highest level is determined by the following formula:

   Service Skill Level x 100 + (*sum of Auxiliary Skill Levels*) / 100 + *no. of auxiliary skills*.

2. The least busy agent at the moment; based on *Capacity share taken by each interaction* currently processed by this agent

3. The longest idle agent; based on the sum of times of continuous *Ready* and *Not Ready* states since the last handled interaction

4. The least occupied agent; based on agent occupancy since login; occupancy is defined as:

   Busy time / login time – Not Ready time

   In that instance, *Busy time* is the sum of handling times of all interactions processed by the agent multiplied by *Capacity share taken by each interaction*, depending on the media type.

When an agent's load decreases (an agent completes processing of an interaction), the system will look for interactions with matching skill requirements that the agent may have sufficient capacity to handle. The interactions will be considered in the order of *Precedence*. If multiple interactions within the same precedence are found, the system will select one of these interactions using the following criteria:

- For voice and chat, the interaction with the highest value of *(priority x wait time)*; for more information, see the description of the Set Priority block in the *Scenario Builder Reference Guide*
- For emails, interaction with the highest priority; in case of multiple interactions of the same priority, the closest one to the SLA breach.
- For preview records, the record is determined by the order in which records are selected within a campaign.

For more information about how routing happens within scenarios, see the *Scenario Builder Reference Guide*, section Find Agent.

1. REDIRECT 5.3:Contact-center-administrator-guide/Directory/Softphones

1. REDIRECT 5.3:Agent-guide/Setup/PhoneDevice

1. REDIRECT 5.3:Contact-center-administrator-guide/Directory/Softphones

1. REDIRECT 5.3:Contact-center-administrator-guide/Directory/Hardphones

1. REDIRECT 5.3:Contact-center-administrator-guide/Directory/Hardphones

1. REDIRECT 5.3:Contact-center-administrator-guide/CallCenterConfiguration/Voicemail

1. REDIRECT 5.3:Contact-center-administrator-guide/UsersandTeams/ForwardingandVoicemailOperation

1. REDIRECT 5.3:Agent-guide/Setup/Voicemail

1. REDIRECT 5.3:Contact-center-administrator-guide/UsersandTeams/Roles

1. REDIRECT 5.3:Contact-center-administrator-guide/UsersandTeams/Roles