5.3 General Information About Access to Reports and Records

Bright Pattern Documentation

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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.

Interaction Records Search

When you select the *Interaction Records* tab from the top of the screen, the application pane will initially display a search page where you define media type(s) of the interactions you are looking for as well as other search criteria, such as time frame, participating agent(s), and/or service(s) involved.

This section offers an overview of the Interaction Records Search feature. For detailed descriptions of search criteria and search results, see sections List of Interaction Records Search Criteria and Search Results.

Notes:

- Only completed interaction segments appear in the Interaction Records search. For emails, this means that an email will only appear in search results after it has been replied to, closed without reply, or saved as a draft. Thus, emails in the initial distribution queue will not be shown.
- The standard aggregation period for the raw data used to produce detailed interaction records and historical reports is 15 minutes; therefore, under normal circumstances, detailed records for completed interactions and agent activities are available in Interaction Records and Agent Timeline within 15 minutes.
- In a worst-case scenario, the recordings for an interaction may be unavailable during two aggregation intervals (i.e., 30 minutes). Therefore, we recommend reviewing an interaction 30 minutes after it is

completed.

Adding Search Conditions

Your search criteria can have any number of conditions (i.e., search criteria). To add a condition to your search, click **add condition**. To edit or delete an existing condition, use the mouse-over operation.

Interaction records search

Saving Search Conditions

You can save a set of search conditions for future use--a helpful capability for when you regularly run the same searches and you do not want to add conditions manually each time you search. To save a set of search conditions, click **Save** and assign a name to it. To use a previously saved set of search conditions, click **Load**, and select its name from the drop-down menu.

Click "Save" to save your search conditions for future use

Viewing Search Results

When all desired search conditions are specified, click the **Search** button. The Search Results page will open with the list of interaction records matching your search criteria. Each row of the displayed table describes a single interaction.

Search results

Note that an interaction may have multiple segments (e.g., when a call was handled by multiple agents). The number of segments in a call is shown in the *Segments* column. You can see details for each segment of a selected call by clicking that number.

Some columns show data that is media-type specific (e.g., *Case ID Subject* is only relevant for emails). You can adjust the format of your table to display only the columns for the data that you need. To remove columns, hover over any column header, open the drop-down menu, and unselect the columns for the data you do not need.

You can download all records that appear in the Search Results page in the .CSV format. To export the records, click the **export** button at the bottom of the page.

You can also manually download email content, call recordings, and call progress analysis (CPA) recordings for the interactions shown in the *Search Results* page. Note that manual download is limited to up to 100 emails, 100 call recordings, and 500 CPA recordings, respectively.

Periodic automated export of call/CPA recordings is configured via *[Services and Campaigns > Results Tab]* of the Contact Center Administrator application.

Erasing Interaction Content

The *Erase* feature for an interaction record allows you to remove the content of the record (i.e., voice recording and/or transcript for a call, the transcript for a chat, message body for an email, etc.), which may be necessary in order to comply with privacy laws or security standards. When taking this action, note that you can delete the content of one interaction at a time. For bulk erasure of interaction content, see the *Contact Center Administrator Guide*, section Results Tab > Interactions Erasing.

An interaction record with the option to erase it

How to Erase Interaction Content

To erase content of a single interaction, take the following steps:

1. Configure the desired criteria for your records search and find the desired interaction record.
2. Open the record for review by clicking it's content item.
3. At the bottom of the record, select the **Erase** button; this will pop the *Erase interaction* window

Interaction-Records-Erase-Window-1-53.PNG

4. Select **Items to erase**, which displays the type of content you wish to erase (e.g., a voice recording, a transcript, or both)
5. Fill in the mandatory **Reason** field; this allows you to provide a reason the content was erased.
6. Select the **Erase** button and you will see a new prompt, warning you that erasing the interaction is permanent.

Interaction-Records-Erase-Interaction-Prompt-53.PNG

7. Select the **Erase** button again and the interaction will be permanently erased. Note that for email interactions, the *Erase* function erases content of one email message at a time. For other media types (voice, chat), the content of the entire interaction will be erased at once, regardless of the number of interaction segments.

Note that in the interaction window, if you select the segment that was erased, a message will display the time, date, user, and reason the interaction was erased.

Interaction-Records-Erased-Interaction-Message-53.PNG

Agent Activity Search

When you select option *Agent Timeline* from the menu on the left, you will see a set of search filters where you select an agent and set a desired time frame. Click the **Search** button.

The search results pane displays all states within all working sessions of the selected agent that fit in the specified time frame. States are represented by the same icons that are used in the Agent Desktop application. For each state, information about its start time, end time, and duration is provided. For interaction-handling states (*Busy* and *After-Call Work*), the media type of the handled interaction is displayed.

For agent sessions where screen recording was used, a screen recording icon is displayed for all states within those sessions. See section Screen Recordings for more information.

Agent activity search