5.3 Search Criteria

Bright Pattern Documentation

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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.

Please note, 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 is available in Interaction Records and Agent Timeline with a maximum delay of 15 minutes.

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

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

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Lists

Lists contain destination data for automated outbound dialing. Each list record provides information about a single destination, and typically includes customer's name, at least one telephone number, and other information specific to the dialing purpose. For example, lists used in a satisfaction survey campaign may include information about products purchased by the customers. Lists are used in outbound and blended services as discussed in section Services and Campaigns - Lists Tab.

List data is deleted from the calling list database automatically when the

- corresponding list object is deleted from configuration
- list is updated with new content via periodic import with the update policy set to *replace list data*

To work with lists, select the **Lists** option from the root menu. To import and configure a new list, click the button with the "+" sign. A list import wizard will open.

List import wizard

List Import

The list import wizard screens and properties are described as follows.

List Type screen

List type screen

Select list type

Select the method that will be used to import data to this list: a file or Salesforce.com query. For the latter, you must have a Salesforce.com integration account configured in your system.

For detailed instructions on importing data from a Salesforce.com application see sectionImporting Calling Lists and Exporting Campaign Results of the *Salesforce.com Integration Guide.*

Name and Source screen

Name and Source screen

Data source

Data source is the source of data for this list. To upload a file from a local source, select **Upload**, click **Browse**, and select the data file. You can use results of previous campaigns, filtered by disposition if necessary, as the source of your list data.

To obtain data from an external source, select the transfer protocol (*FTP* or *SFTP*), and specify the address (URL), *Username*, and *Password*.

Note that only plain text list files (.CSV or fixed width) are supported as sources for list data. This setting is specified for list type *File* only.

List name

The list name is mandatory and must be unique within the contact center. The name of the selected data source is offered as the default name.

List format

If you want the format of a list to be based on the format of one of the previously imported lists, select the desired *list format* from the drop-down menu. Using an existing list format can save you time while going through the subsequent import steps, especially the *Fields* wizard screen.

If you need to review the desired format before assigning it, close the wizard, locate the desired format in the *Format* column of the list view, select the corresponding list, and click the **view** link in the **Properties** tab.

Note that if you select an existing list format but decide to introduce some changes for the imported list (e.g., change some field names), then upon completion of the wizard, you will be prompted to save these changes as a new format.

If you wish to create a new format using the layout of the imported list, select**Create new format**. This setting is specified for list type **File** only.

Salesforce.com integration account

The Salesforce.com integration account is what will be used to obtain Salesforce.com data for this list. This setting is specified for list type Salesforce.com only.

SOQL query to select object for list

Use this field to specify the query for selecting Salesforce.com records for this calling list. The query must be written in the Salesforce Object Query Language (SOQL). Note that the records must contain object identifiers and have at least one phone number.

This setting is specified for list type Salesforce.com only. Note that there is a 30 second timeout on the Bright Pattern Contact Center side to begin receiving data from SFDC after the SOQL query is submitted.

Format Type screen (for list type *File* only)

Format Type screen

Delimited

Select *Delimited* if a character, such as comma or tab, separates each field in the imported data

First line contains field names

Select this checkbox if the first line of the imported data appears to contain column headings. Field names are case insensitive starting from version 3.13. This means field names that differ in case only refer to the same field.

Fixed width

Select this option if fields of the imported data appear to be aligned in columns with spaces between each field.

Input file encoding

The *Input file encoding* option lets you select the encoding used by the source file. Initially, the UTF-8 encoding is assumed by default. If you select another encoding during a list import, the selected encoding will become the new default for subsequent list imports.

Format Options screen (for list type *File* only)

Format Options screen

Delimiter

Select the character that is used to separate each field in the imported data. If the delimiting character is anything other than the comma, tab, or semicolon, use the **Custom** option to specify the character. When the correct delimiter is selected, the preview should show the imported data arranged as a table.

Fields screen

Fields screen

Do not import field (skip)

This field indicates whether the selected field is to be imported. Select this checkbox if the data in the selected field is not essential for any contact center operations (i.e., will not be used for dialing, analyzed in a scenario, or displayed for agents) and does not need to appear in campaign results.

Type

Specify the *type* of data that the selected field contains. If the type of data is anything other than the data types predefined in the drop-down menu, select *Other*. Note that at least one field of the imported list must have type *Phone*.

If the first row of the imported data contains column names, the wizard will try to automatically set field types according to matching column names (e.g., a column titled *State* will be set to field type *State*). You should review all name-type pairs to make sure the mapping is correct.

Possible uses of the available field types are described as follows.

Account

Account can be used for a field that contains a customer identifier. If defined, the value from this field will be stored as part of the history of all calls initiated by the corresponding calling record and can be used as a selection criterion in interaction record search. Unique account numbers can also be used as calling record keys (see below). A list can have only one field of this type.

Agent Login ID

Agent Login ID can be used to assign list records to specific agents. This may be useful, for example, for proactive contacts within established business relationships where clients might expect/prefer to be contacted by business representatives that they are familiar with. Note that such personal record assignments are used in preview campaigns only. When a list with records assigned to specific agents is used in apredictive, progressive, or automatic/IVR campaign, all such assignments will be ignored.

Caller ID

If calling records contain numbers that should be displayed as caller IDs when dialing corresponding records during campaigns, use the field type *Caller ID* for the field that contains these numbers. Use of these numbers as Caller IDs for a particular campaign is enabled by the campaign's Caller ID settings (option *From list field of type "Caller ID", otherwise default*). Note that your service provider may or may not allow use of arbitrary caller ID numbers for your outgoing calls. If use of arbitrary caller IDs is not available to you, the number specified in the calling record will be used only as a caller ID if it matches one of the access numbers assigned to your contact center; otherwise, the specified default number will be used. When using this field to specify caller IDs for your campaign, be sure to check all legal requirements and restrictions for what can be sent as a caller ID in the jurisdictions where you operate.

Company

Company can be used when calling record contains a company name.

Date/Time

If the calling list is based on customers' callback requests (opt-in callback list), your local telemarketing regulations may require that such callbacks are made within a specific number of days. In this case, the imported list will typically have information about when the callback request was made. Use the field type *Date/Time* for this information. Fields of the *Date/Time* type cannot be used to set campaign quotas.

Date/Time - schedule call at

Date/Time - schedule call at can be used to provide, during list import, information about when this record needs to be called. It can be used to define the exact moment of time when this record needs to be attempted.

Note that the call will happen as close to the specified date and time as possible; the system will make the best attempt. Safe calling hours are not ignored. If the date and time are in the past at the time of list load, the field contents are ignored.

Encrypted data

Encrypted data can be used to store sensitive information that must be stored encrypted and only be presented in clear text to the agent who will be processing the record in case of a successful call attempt. Note that the encrypted data cannot be not automatically processed by the system, and thus, may not include any information used for campaign automation, such as phone numbers, zip codes, states, or any information that is used to set campaign quotas. If you do not see the **Encrypted data** field type, the data encryption function is not enabled for your contact center by the service provider.

First name

First name is the person's first name.

Integer

Integer is intended for fields with semantically numeric data (e.g., person's age or account balance) that may be used to set a campaign quota.

Last name

Last name is a person's last name.

Other

Other can be used for fields that do not fall into any specific field type uses outlined here.

Phone

Phone should be set for fields with phone numbers that may be dialed during a campaign. A list must contain at least one field of this type.

Postal code

Postal code is a person's postal code. This must be present if the *Use safe calling hours* option is desired.

Priority

Priority can be used to indicate that the record shall be attempted as soon as possible relative to other records within the same list. This can be useful, for example, in order to give calling priority to the most recent web leads that tend to be most effective when followed up on immediately. A record will be treated as a prioritized record when its priority field is set to any value other than empty string, zero, "no", or "false". The priority setting only affects the first attempt to dial the record; for any possible subsequent attempts the prioritized record will be treated as a regular record. Priority of records can also be set to expire after a specified time period (see property *Priority expires after*).

State/Province

State/Province is a person's state/province. Either this field or the *Postal code* field must be present in the calling records in order to observe mandatory State Calling Hours.

Name

If the first line of the imported data contains column headings, these headings will be used as the default field names. Otherwise, default names *Field1*, *Field2*,..., *FieldN* will be assigned. Use this option to change the default field name if necessary. Field names are case-sensitive, which means that field names that differ in case only refer to the same field.

Required Field

Required Field indicates that the data in this field is required. If selected, the import process will not skip records that have no data in this field.

For all fields of the *Phone* type, this checkbox is preselected automatically. You can unselect it manually for any phone field that is optional. Remember, however, that at least one field of the imported list must have the type *Phone*.

For lists of the Salesforce.com type, field **ID** is preselected automatically and cannot be unselected.

Searchable Field

Searchable Field indicates this field may be searched for in the Agent Desktop application when associated with a custom Activity History field that is included in a screenpop activity form. For more information, see section Activity Forms.

The numbers are in the format for

This setting is displayed for the fields of type *Phone* only.

If all phone numbers in this field are within the USA and/or Canada, select **United States and Canada**. In this case, the numbers in this field will be processed according the following rules:

- If a number begins with “011”, it will be kept as is.
- If a number begins with “1” and has eleven digits, it will be kept as is.
- If a number does not begin with “1” and has ten digits, “1” will be prepended.
- In any other case, the record will not be imported.

If some or all numbers in this field are from countries other than the USA or Canada, select **Other countries or multiple countries**. In this case, the numbers in this field will be processed according the following rules:

- If a number begins with “+”, the leading "+" sign will be removed.
- In any other case, the number will be assumed to begin with a country code and also kept as is unless modified using the *Remove prefix* or *Default country code* settings.

Remove prefix

This setting is displayed for the fields of the type *Phone* only and can be used when the number format is set to *Other countries or multiple countries*. If phone numbers in this field contain a prefix that must be removed, specify this prefix here. Otherwise, this setting should be left blank.

Default country code

This setting is displayed for the fields of type *Phone* only and can be used when the number format is set to *Other countries or multiple countries*. By default, numbers in a field of type *Phone* are assumed to have country codes included. In this case, you can leave this field blank. Otherwise, specify the country code here; it will be automatically prepended to each number in the given field unless the number begins with “+”.

Note that a country code must be specified for campaigns with any calling hour restrictions and for campaigns where numbers are checked against DNC lists of the following types: Area Code, Geographic (Postal), and Geographic (State/Province).

Time zone

This setting is displayed for the fields of *Date/Time* type only. By default, the time in this field is assumed to be specified for the time zone indicated in the general settings of your contact center. You can use this setting to specify another the time zone for this field.

Date/Time format

This setting is displayed for the fields of *Date/Time* type only and allows you to select the format in which the date and time is specified in this field. If you cannot find a format that matches exactly the date/time pattern used in the imported list, use the editable field to specify this format manually, using the Java SimpleDateFormat conventions.

Note that campaign results report timestamps of call attempts in the following format: **MM/dd/yyyy HH:mm:ss z Z**, where **z Z** is the time zone (e.g., **11/09/2015 13:59:57 PST -0800**).

Order of prioritized records

This setting is displayed for the fields of type *Priority* only and defines the order in which prioritized records received during list updates will be attempted.

Priority expires after

This setting is displayed for the fields of type *Priority* only and specifies the time period during which records with a non-empty value of this field will be considered a prioritized record. Upon expiration, priority of these records will be lowered to normal. If you do not wish the priority of a record to expire at all, set this field to 0.

Key screen (for list type File only)

Key screen

Fields

This screen allows you to select a field, or a combination of fields, whose values will be used as keys (i.e., will uniquely identify records within the list). Only the fields that were marked as *Required* in the previous wizard step will appear as possible keys. Records with the same key values are considered duplicates, and only one of such duplicate records will appear in the imported list. Keys are also used to reference the campaign results to the original list records.

Save config only

Click this button, instead of clicking *Next*, if you wish to save only the list format (i.e., the configured field and key information without the actual data). The result will appear as a new list with zero records in the list view.

Import Complete screen

Import Complete screen

Import results

This screen provides statistics about the imported list, including the number of successfully imported records, as well as the numbers of records that have not been imported for various reasons.

Calling records that contain the same phone number in multiple fields of the*Phone* type will be successfully imported. The dialer will detect duplicate numbers while processing the list for use in a specific campaign and will only use the number in the first phone field while ignoring that number in all other phone fields of the same record. For example, if a calling record contains the same number in the field **Home Phone**, which happens to be the fourth field in the record, and in field **Mobile Phone**, which is the sixth field, the dialer will use this number according to the calling hours set for home phones. It will ignore this number when dialing mobile numbers (or when sending preview records to agents in case of a preview campaign).

Updating Lists

New lists imported via the list import wizard appear in the list view of Lists. You can update these lists manually or set up periodic automatic updates, in both cases list update procedure can be performed on-a-fly during actively running campaign.

Manual List Update

To update a list manually, select it from the list view and click the**Add records** button at the bottom of the screen. (Note that this function is not available for lists of Salesforce.com type.) A list update wizard appears. Its screens and properties are described as follows.

Name and Source screen

List name

List name is the name of the selected list. It is read-only.

Data source

Data source is the source of data for this list. To upload a file from a local source, select**Upload**, click **Browse**, and select the data file. To obtain data from an external source, select the transport protocol (*FTP* or *SFTP*), and specify the address (URL), *Username*, and *Password*.

Note that only plain text list files (.CSV or fixed width) are supported as sources for list data. Note that the data structure of the selected data source shall correspond to the data structure of the data source used for the original import.

Update Policy screen

replace list data

Select this option if the data from the specified data source shall replace the existing list data. Note the following:

- Any campaign results that may have been associated with the existing list records will be deleted.
- Replacement of existing list data requires internal re-processing of the entire calling list. Thus, if updates with this policy are applied to a list within a running campaign, use of this list within the given campaign will be suspended until list re-processing is complete. The suspension time will depend on the list size and, for long

lists, may amount to tens of minutes. Other lists associated with the same campaign will not be affected.

add list data

Select this option if the data from the specified data source shall be added to the existing list data. Note that data records whose keys match with keys of the existing records will not be imported.

Import Complete screen

Import results

This screen provides statistics about the imported list, including the number of successfully imported records, as well as the numbers of records that have not been imported for various reasons.

List Properties and Automated Updates

To view the current content of a list, set up periodic automatic updates, or view the list import/update history, select the desired list from the list view.

Lists > Properties tab

Lists screen properties

Properties tab

Name

This is the *name* of the list. List name is originally defined during the initial list import, but it can be changed at any time. The name must be unique within the contact center.

Format

Format is the name of the format that this list is based on. It is read-only. (The format is selected or defined during the initial list import.)

To review the format, click the **view** link. A new dialog window will open with description of all fields defined within this format. For more information, see description of the **Fields** screen of the List Import Wizard above. If any activity forms are mapped to lists based on this format, this view will also show the mapping between the form fields and list fields.

For lists of the Salesforce.com type, the window will also show the SOQL query that is used to extract the list records from the Salesforce.com application. While you cannot change the field composition or formatting, you can modify the data selection criteria for these fields (i.e., any condition in the *WHERE* part of the query). To do so, hover over the SOQL query and click **EDIT**. The new selection criteria will be applied upon the next list update.

Campaigns

Click **add** to associate this list with one or more campaigns. For additional configuration options related to use of the list within the associated campaign, select this campaign in the Services and Campaigns list view and open the Lists tab.

Expire records

You can set the list records to expire in a specified number of days. If a record expires before it is completed according to the regular campaign dial rules, its processing within campaign will be finished with the predefined disposition *Record Expired*.

To set the records of the given list to expire, select the checkbox, specify the *Expiration period*, and indicate the starting point from which this period will be counted:

- To count from the date when records appear in the system (either via the initial list import or subsequent list updates), select **Count expiration period since record insertion**. This expiration mechanism can be used to comply with your local telemarketing regulations that may require periodic scrubbing of calling records against national or state-wide do-not-call lists, after which any unmatched numbers are considered to be good for dialing over a certain period (e.g., 30 days for numbers added to the US National Do-Not-Call Registry or 15 days for numbers ported to mobile phones).
- To count from the date specified in the calling record itself, select **Count expiration period using date in record**. This expiration mechanism can be used for calling lists that are based on customers' callback requests (opt-in callback lists) if your local telemarketing regulations require that such callbacks are made within a specific number of days.

Expiration period

Expiration period is the number days in which the records of this list expire. See the description of the **Expire records** setting for more information.

Expiration field

Expiration field is the field of the calling list that will be used to determine when the callback request was made, which is necessary in order to calculate when it expires. Only fields of type **Date/Time** are available for selection as expiration fields. This setting is essential if you have selected the **Count expiration using date in record** option. See the description of the **Expire records** setting for more information.

Periodic Import

To set up automatic periodic updates for this list, click **edit**.

In the dialog that appears:

1. Specify the protocol (*FTP* or *SFTP*), *URL with file name*, *FTP Username*, and *FTP Password*; this setting is specified for lists of *File* type only.
2. Select the *Start date and time* of the first update and specify the desired *Import interval*.
3. Select the desired *Update Policy*. (Note that the *replace list data* policy may suspend use of this list within a running campaign for the time it takes to re-process the list.) This setting is specified for lists of the *File* type only.
4. Click **OK**.
5. Once these parameters are defined, select the *Enabled* checkbox to activate periodic import.

For lists of the *Salesforce.com* type, new records matching the original SOQL query will be added to the list during each update, while any records that may have been removed from Salesforce will be disabled in the list. If there are campaign results available for such disabled records, they will be preserved.

For lists of the 'Salesforce.com *type, there is a 30-second timeout on the Bright Pattern Contact Center side to begin receiving data from SFDC after the SOQL query is submitted.*

You can also run import with the above settings at any time by clicking **Run import now**.

Contents tab

Lists > Contents tab

List pane

The *List pane* shows the entire content of the list. It is read-only.

Record pane

The *Record pane* shows the content of the record selected from the List pane. It is read-only.

Timestamp

Timestamp is the timestamp of the operation.

Errors is the total number of records that were not imported due to various errors (missing required fields, duplicate keys, incorrect format).

Operator

Operator is the username of the user who performed this operation.

Comment

Comment is the operation result.

Log Tab

Timestamp

Time stamp of the operation

File

Name of the list data source file

Direction

Type of the operation (*IN* for import/updates, *EXP* for export of campaign results)

Number of records

Total number of successfully imported/exported records during this operation

Errors

Total number of records that were not imported due to various errors (missing required fields, duplicate keys, incorrect format)

Operator

Username of the user who performed this operation

Comment

Operation result

1. REDIRECT 5.3:Agent-guide/Work/CasesEmail/CasesEmailandThreads

Global Interaction Identifier

Global interaction identifier (GIID) is a UUID-formatted number assigned to every interaction processed within Bright Pattern Contact Center. It can be used to track interaction history through all stages of processing within the system, including possible consultations, transfers, conferences, service changes, and media upgrades. At run-time, GIID can be exported to third-party applications via scenarios and/or desktop integration APIs. Historically, GIID appears in all records related to interaction processing, including call detail records, outbound campaign results, voice recording file names, and activity history of pre-integrated CRM applications. GIID is available as a search condition (i.e., data element) in the interaction records search.

Examples of global interaction IDs in interactions records search results

Rules When Assigning a GIID

Depending on whether an interaction is new or related to another existing interaction, GIID is either generated or inherited. More specifically, the following general rules apply when assigning a GIID:

- For inbound voice and chat interactions, GIID is generated as soon as the interaction enters the contact center.
- For predictive, progressive, and automatic (IVR) campaign calls, a new GIID is generated for every new call attempt (i.e., different call attempts related to the same calling record have different GIIDs).
- For preview campaigns, a new GIID is generated each time a preview record is distributed to an agent. When the agent makes a call based on a preview record, the call attempt inherits the GIID of the record. If an agent makes several call attempts while handling one preview record, all such call attempts will have the same GIID.
- Manual consultation calls, both outbound and internal, inherit GIID of the held primary call. If several calls are on hold, the consult call inherits GIID of the call that has been placed on hold most recently.
- For manual outbound and internal calls unrelated to any existing calls, GIID is generated as soon as the call is dialed.
- For new inbound email interactions, GIID is generated when the email enters the contact center.
- For new outbound email interactions (emails unrelated to any existing cases), GIID is generated as soon as a draft is created (agent clicks the *Compose* button).
- For follow-up emails initiated by customers, GIID is generated when the email enters the contact center.
- Follow-up emails initiated by agents inherit GIID of the previous email in the email thread.
- A call originated in the context of a customer chat interaction inherits GIID of the chat interaction.
- A call originated in the context of an email interaction inherits GIID of the email interaction.
- A new email originated in the context of a voice call inherits GIID of the call.
- Transferred/forwarded interactions inherit GIID assigned to the original interaction in a transfer sequence.
- Conference portions of interactions inherit GIID assigned to the original interaction.

Example

A typical use of the GIID can be illustrated by the following example. When reviewing your customer relationship management (CRM) transactions, you need to find voice recordings of the related calls, both while they are still stored in the Bright Pattern Contact Center system and after they have been exported and stored elsewhere.

When configuring your system to support the above task:

- If you use one of the pre-integrated CRM applications, depending on your workflow, the GIID related to transactions handled by your agents may be available automatically as part of the *activity history* (see below). If this is not the case, consider using one of the available scenario integration blocks (e.g., Fetch URL) to store the content of variable *$(globalInteractionId)* as part of CRM transaction records associated with your calls.

- To make sure you can find voice recordings even after they have been exported out the system, add the *$(GlobalInteractionId)* component to the file names of exported recordings.

When looking for a voice recording related to your CRM transaction:

- Copy the GIID from the CRM transaction.
- Check the transaction date against the voice recording storage times agreed upon with your service provider (the default period is 90 days).
- If the voice recording is still stored within Bright Pattern Contact Center, open the Interaction Records Search page, select GIID as your search condition, and paste the GIID you have copied from your CRM transaction.
- If the voice recording is no longer within Bright Pattern Contact Center but has been exported for offline storage, look for the file containing the copied GIID on the location where the recordings are stored.

Note that depending on the workflow, your search may produce several voice recordings (e.g., recordings of call segments before and after a transfer, or a recording of an associated consult call).

How GIIDs Are Exposed

GIIDs are exposed via the data elements described in the following table. The "Where to Use" column names where the data element is used, and the "Data Element to Use" column describes the type and name of the element (i.e., field, variable, parameter, etc.).

Where to Use	**Data Element to Use**
Scenarios	• variable *$(item.globalInteractionId)* - An Interaction property
Simplified Desktop .NET API	• *globalInteractionId* - A property of events *evtCallDialing* and *evtCallOffered* • *globalInteractionId* - An optional parameter of method *CallDial*
Desktop Integration API .NET Version	• *globalInteractionId* - A property of event *itemArrivedCallback* • *globalInteractionId* - An optional parameter of method *makeCall*
Salesforce.com integration	• *Call Object Identifier* - A field of Salesforce.com activity history
Zendesk integration	• *https://<portal>/InteractionSearch?global_interaction_id=<x>* - The URL of Zendesk activity history; clicking this URL opens the Interaction Records Search page with the global interaction identifier preset as a search condition

RightNow integration	• *global_interaction_id* - A field from RightNow activity history
Reporting Database	• *global_interaction_id* - A field from the table *call_detail*
Detail Reports	• *Global ID* - A field from the Call Detail Report and Email Detail Report
Campaign Results	• *Global Interaction ID* - A field from the campaign results in detailed and simple formats
Exported voice recording	• *$(globalInteractionId)* - An optional file name component of exported voice recording files • *Global Interaction ID* - A field of the recordings details .CSV file

Note the following:

- When two inbound calls are merged into a conference, the conference call gets GIID of the older call (the call that appeared in the system first).
- Consult calls initiated from a hardphone do not inherit GIID from the original call.
- GIID is not currently available as a scenario variable for the following types of interactions (because interactions of these types do not have exposed scenarios):
  - Preview campaign calls
  - Manual outbound and internal calls
  - Emails

1. REDIRECT #topic_agent-guide/help/howtoreportacallqualityproblem

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

1. REDIRECT 5.3:Contact-center-administrator-guide/ServicesandCampaigns/PropertiesTab

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

Customer Conversation Patterns Report

The Patterns report provides supervisors and administrators with a visual representation of keywords found in interaction records, along with the ability to conduct a full text search on interaction records. Keywords are shown in a word cloud, in which the most frequently used words are larger than less frequently used words. Supervisors and administrators should be able to find subset of interaction records based on set of keywords (phrases) they contain.

The Patterns report can be run for a selected timeframe and by service. Either all keywords or only those used by customers can be used for cloud creation. When the report is run, the resulting word cloud should contain information that corresponds to keywords saved with transcripts.

Note that the Patterns report requires Natural Language Understanding (NLU) for identification of keywords and Speech to Text (STT) for converting vocals from voice interaction into text. As such, Patterns reports can be run only if a default STT integration account and NLU integration account have been configured for your contact center.

Patterns word cloud report

Filters

Patterns report filters are described as follows.

Patterns

Time frame

Select the desired reporting time frame. For example, if it is your practice to start your day with reviewing results of the previous day, select the *Yesterday* time frame.

Choose from the following:

- Today
- Yesterday
- This week
- Last week
- This month
- Last month
- Custom

To request a report for a specific time interval within a day, select a day time frame (*Today* and *Yesterday*) and use the *From* and *To* fields to specify the desired interval. This may be convenient if you need to get separate reports for different contact center shifts. To get a report for a shift that begins before, and ends after, midnight, select time frame *Yesterday*, and set the desired start time in the *From* field and the desired end time in the *To* field.

From

From is the date that the desired time interval for the report begins.

To

To is the date that the desired time interval for the report ends.

Time zone

Click the link to specify your default time zone and locale for the report's time interval.

Service / campaign

Any services or campaigns configured for your contact center are listed in the *Service / campaign* drop-down menu. Select the desired service(s) and campaign(s) to be used for the full text search.

Customer

When selected, the *Customer* radio button enables customer interaction records to be searched. By default, the *Customer* radio button is selected.

Agent

When selected, the *Agent* radio button enables agent interaction records to be searched.

How to Run a Patterns Report

1. First, make sure that a Speech to Text (STT) integration account has been configured for your contact center. STT is required for converting voice to text for voice services.

2. In the Contact Center Administrator application, go to section *Reports* > *Patterns*.

Patterns-Report-5399.png

3. Specify filters (see Filters descriptions).
4. Click the **Run** button.
5. The word cloud will be created according to the set of words and how often they were used (e.g., words that are used often are shown in larger font).

Patterns-Word-Cloud-50.png

1. REDIRECT 5.3:Agent-guide/Work/CasesEmail/CasesEmailandThreads

1. REDIRECT 5.3:Contact-center-administrator-guide/ScenarioEntries/MessagingChat

1. REDIRECT 5.3:Agent-guide/Help/WaystoRequestAssistance