5.3 Report Generation

Bright Pattern Documentation

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Agent Activity Report

The *Agent Activity* report provides detailed records of activities of selected agents in chronological order. These details are called metrics.

Running the Agent Activity report

You can narrow the report's data by specifying the following parameters:

- **Timeframe** - The specified time range for which the data will be generated on the report (i.e.,*Today*, *This week*, *Custom*, etc.)
- **From** - If the *Custom* timeframe is selected, *From* is the custom date range
- **Timezone** - Clicking the link shown allows you to designate the timezone settings for the report's timeframe
- **Agent** - The drop-down menu displays the agent(s) who have activity to report
- **My subteam only** - Selecting this checkbox will run a report for agents selected for a supervisor'ssubteam

Metric Descriptions

The Agent Activity Report provides records of activities of selected agents. The metrics of this report are organized into columns, which are described as follows:

Activity

The activity type, which can be one of the following:

- *Ready*
- *Not Ready*
- *Inbound*
- *Outbound*

- *Conference*

Agent disposition

For an interaction-handling activity, the [disposition] assigned to the call by this agent

Case ID

For an interaction-handling activity, the identifier of the case that this interaction is related to. It currently applies to email interactions only

Co-browse

Indicates whether any co-browsing sessions took place during this interaction. Currently works for co-browsing with Surfly only.

Detail

- For the *Outbound* activity, the extension of the called party if the call was made internally and was answered.
- For the *Inbound* activity, the remote party's Caller ID for calls, IP address for chats, and email address for emails.
- For the *Not Ready* activity, the reason for being *Not Ready* if one is specified (otherwise, generic *Not Ready*).

Disposition

For interaction-handling activity, *Disposition* provides information about how the activity ended. Such *Dispositions* are described as follows:

- *Caller Terminated*: Inbound call/chat was terminated by the customer
- *Callee Terminated*: Outbound call/chat was terminated by the customer
- *Agent Disconnected*: Call/chat was terminated by the agent
- *Rejected*: Interaction was rejected by the agent
- *No Answer:* Interaction was not accepted by the agent
- *Busy*: Outbound call did not complete because the destination was busy or did not answer within a timeout
- *Network Failure*: Outbound call did not complete because of network congestion
- *System Disconnected*: Call/chat was disconnected by the system
- *Abandoned*: Outbound call was terminated by the agent before it was answered
- *Transferred*: Remote party on the interaction changed due to a transfer (the after-transfer phase is shown as a subsequent activity)
- *Terminated by Transfer*: Agent transferred the interaction
- *Conferenced*: Call/chat became a conference (the conference phase is shown as a subsequent activity)
- *Replied:* Inbound email was replied to by the agent
- *Closed:* Inbound email was closed without reply by the agent
- *Service Changed:* Email was recategorized by the agent (service associated with the email was changed and the same agent continued processing it; subsequent email processing is shown as a separate activity)
- *Sent:* Outbound email was sent by the agent
- *Discarded:* Outbound email was discarded without being sent by the agent
- *Saved:* Email was saved as a draft in the agent's personal queue

Duration

The time spent in this activity.

For interaction processing activities, duration includes both in-focus and out-of-focus time, as well as After Call Work (ACW) time.

External Number

- For an *Inbound* activity, the originally dialed number or original destination email address
- For an *Outbound* activity, the caller ID or the content of the "From" field of the email when it left the system

Held

The number of times the agent placed the call on hold during this activity (for emails and chats, the number of times the agent had the interaction out of focus during this activity)

Hold Time

- For calls, the total time the agent had the call on hold during the activity
- For emails and chats, the total time that the agent had the interaction out of focus during this activity

Note that *Hold Time* is displayed for interaction-handling activities only.

Max Hold

The duration of the longest period a call was on hold during this activity

Media type

For an interaction-handling activity, the interaction media type

Reply Time

The total amount of time from the moment the email interaction was accepted by the agent or entered his personal queue and until it was completed (including ACW if any) or transferred

Service

For an interaction-handling activity, the name of the service associated with this interaction

Talk Time

- For calls, the total time the agent spent talking during this activity, excluding hold times
- For emails and chats, the total time that the agent had the interaction in focus during this activity

Note that *Talk Time* is displayed for interaction-handling activities only.

Time

The time when the activity started. Only the activities that started within the selected reporting interval will be shown.

Agent Activity CSV Report

The *Agent Activity (CSV)* report provides detailed records (i.e., metrics) of activities of selected agents in chronological order.

This report is the same as the Agent Activity report, with the exception that it is exported in .CSV format only. Because this report is available out-of-the-box as a .CSV file, large volumes of data over long periods of time (e.g., per quarter, half a year, etc.) can be exported conveniently into a single file without using JasperSoft Studio.

Metric Descriptions

The metrics of this report are organized into columns, which are described as follows in the order in which they appear in the report.

login_id

login_id is the agent's user ID.

first_name

first_name is the first name of the agent.

last_name

last_name is the last name of the agent.

team_name

team_name is the name of the team the agent has been assigned to.

start_time

start_time is the time when the activity started. Only the activities that started within the selected reporting interval will be shown.

Time is given in Universal Coordinated Time (UTC).

activity

activity is the activity type, which can be one of the following:

- *Ready*
- *Not Ready*
- *Inbound*
- *Outbound*
- *Conference*

duration

duration is the time spent in this activity. For interaction processing activities, duration includes both in-focus and out-of-focus time, as well as After Call Work (ACW) time.

detail

- For the *Outbound* activity, *detail* displays the extension of the called party if the call was made internally and was answered.
- For the *Inbound* activity, *detail* displays remote party's the Caller ID for calls, IP address for chats, and email address for emails.
- For the *Not Ready* activity, *detail* displays the reason for being *Not Ready* if one is specified (otherwise, generic *Not Ready*).

talk_time

- For calls, *talk_time* is the total time the agent spent talking during this activity, excluding hold times.
- For emails and chats, *talk_time* is the total time that the agent had the interaction in focus during this activity.

Note that *talk_time* is displayed for interaction-handling activities only.

hold_time

- For calls, *hold_time* is the total time the agent had the call on hold during the activity.
- For emails and chats, *hold_time* is the total time that the agent had the interaction out of focus during this activity.

Note that *hold_time* is displayed for interaction-handling activities only.

service_name

For an interaction-handling activity, *service_name* displays the name of the service associated with this interaction.

destination_number

destination_number is the name of the recipient of an interaction; this can include chat services, email addresses, phone numbers, and phone extensions.

origination_number

origination_number is the phone number, IP address, or email address an interaction was sent from.

external_number

- For an *Inbound* activity, *external_number* displays the originally dialed number or original destination email address.
- For an *Outbound* activity, *external_number* displays the caller ID or the content of the "From" field of the email when it left the system.

disposition

For interaction-handling activity, *disposition* provides information about how the activity ended. Such *dispositions* are described as follows:

- *Caller Terminated*: Inbound call/chat was terminated by the customer
- *Callee Terminated*: Outbound call/chat was terminated by the customer
- *Agent Disconnected*: Call/chat was terminated by the agent
- *Rejected*: Interaction was rejected by the agent
- *No Answer:* Interaction was not accepted by the agent
- *Busy*: Outbound call did not complete because the destination was busy or did not answer within a timeout
- *Network Failure*: Outbound call did not complete because of network congestion

- *System Disconnected*: Call/chat was disconnected by the system
- *Abandoned*: Outbound call was terminated by the agent before it was answered
- *Transferred*: Remote party on the interaction changed due to a transfer (the after-transfer phase is shown as a subsequent activity)
- *Terminated by Transfer*: Agent transferred the interaction
- *Conferenced*: Call/chat became a conference (the conference phase is shown as a subsequent activity)
- *Replied:* Inbound email was replied to by the agent
- *Closed:* Inbound email was closed without reply by the agent
- *Service Changed:* Email was recategorized by the agent (service associated with the email was changed and the same agent continued processing it; subsequent email processing is shown as a separate activity)
- *Sent:* Outbound email was sent by the agent
- *Discarded:* Outbound email was discarded without being sent by the agent
- *Saved:* Email was saved as a draft in the agent's personal queue

agent_disposition_name

For an interaction-handling activity, *agent_disposition_name* displays the disposition assigned to the call by this agent.

media_type

For an interaction-handling activity, *media_type* displays the interaction media type.

case_number

For an interaction-handling activity, *case_number* displays the identifier of the case that this interaction is related to. It currently applies to email interactions only.

cobrowsing

Indicates whether any co-browsing sessions took place during this interaction. Currently works forco-browsing with Surfly only.

Agent Email Report

The *Agent Email* report provides key performance indicators for agents handling interactions of the email media type.

The Agent Email report gives performance indicators for agents handling emails

Metric Descriptions

The metrics of this report are organized into columns, which are described as follows.

Offered

Offered provides the number of inbound emails that were pushed to the agent within the given reporting interval.

Not Accepted

Not Accepted provides the number of emails that were pushed to the agent and were not accepted (i.e., returned to the queue or to the transferring agent). Note that a postponed email is considered accepted.

Pulled

Pulled provides the number of inbound emails that the agent pulled from the service queues within the given reporting interval.

Assigned

Assigned provides the number of emails that were placed in this agent's personal queue by a supervisor or another agent.

Carried Over

Carried Over provides the number of emails that were delivered to this agent by any method before the given reporting interval and remained unprocessed at the beginning of the interval.

Processed - Total

Processed - Total provides the number of inbound emails that this agent completed by any method within the given reporting interval. It is the sum of *Replied*, *Closed*, *Transferred*, and *Service Changed*.

Processed - Replied

Processed - Replied provides the number of inbound emails that this agent replied to within the given reporting interval (including emails that the agent forwarded). Note that only the first response is counted. Possible follow-up email messages related to previously replied emails are considered outbound emails and are counted by the *Outbound Sent* metric.

Processed – Closed

Processed – Closed provides the number of inbound emails that this agent closed without reply within the given reporting interval.

Processed – Transferred

Processed – Transferred provides the number of inbound emails that this agent transferred within the given reporting interval.

Processed – Service Changed

Processed – Service Changed provides the number of inbound emails that this agent recategorized (i.e., the agent changed this service to another email service and continued processing the interaction).

Remaining

Remaining provides the number of emails in the agent's personal queue at the end of the reporting interval.

Avg Reply Time

Avg Reply Time is the average time that this agent spent replying to an inbound email. The time is measured from the moment an email is delivered to the agent (to the agent's desktop or to *My Queue*) to the moment when the first meaningful response leaves the agent's *My Queue*.

Avg In-focus Time

Avg In-focus Time is the average time that the agent had an inbound email selected in the active communications list. This metric is counted only for the emails that agents replied to.

Avg Out-of-focus Time

Avg Out-of-focus Time is the average time that the agent had an inbound email active on Agent Desktop but not selected in the active communications list. This metric is counted only for the emails that agents replied to.

Avg ACW Time

Avg ACW Time is the average time that the agent spent doing after call work related to replied emails.

Outbound Sent

Outbound Sent provides the total number of outbound emails that this agent sent within the given reporting interval. This metric includes both new outbound emails and possible follow-up email messages related to existing threads.

Outbound Discarded

Outbound Discarded provides the number of outbound emails that this agent started at any time and discarded (deleted without sending) within the given reporting interval. This metric includes both new outbound emails and possible follow-up email messages related to existing email threads.

Agent Performance Report

The *Agent Performance* report shows changes over time of key performance indicators for a selected agent.

All interaction-related metrics in this report are calculated for call and chat media types. For agents’ email metrics, use the [Agent Email Report](#).

The Agent Performance report provides metrics related to performance indicators for a specific agent

Metric Descriptions

The metrics of this report are organized into columns, which are described as follows in the order in which they appear in the report.

Occupancy %

Occupancy % refers to the percentage to time that the agent spent handling calls, including after call work, relative to the total working time (i.e., handling calls and being Ready to handle calls).

Number of Calls Offered

Number of Calls Offered refers to the number of inbound calls that were offered to the agent, including direct calls, internal calls, and calls that were not assigned a service; *offered* indicates the call passed through the Connect Call scenario block. Note that campaign calls are not included.

Number of Calls Handled

Number of Calls Handled refers to the number of inbound calls handled by the agent.

Average Handling Time (inbound)

Average Handling Time (inbound) refers to the average time, including after call work and hold times, the agent handled the inbound calls.

Number of Calls Made

Number of Calls Made is the number of outbound calls handled by this agent, including campaign calls.

Average Handling Time (outbound)

Average Handling Time (outbound) refers to the average time, including after call work (ACW) and hold times, that the agent handled the outbound calls. This metric includes campaign calls.

Total Logon Time

Total Logon Time is the total time that the agent was logged on during the reporting interval.

Total Working Time

Total Working Time is the total time that the agent was either handling calls (including after call work) or was ready to handle calls.

Call Rejects / No Answer

Call Rejects / No Answer refers to the number of calls that the agent rejected and/or did not answer.

Initiated Transfers

Initiated Transfers is the number of calls that the agent transferred.

Number of Surveys

This metric gives the number of surveys available for calls handled by the agent during the reporting interval.

First Call Resolution %

First Call Resolution % refers to the percentage of surveys that indicated first call resolution relative to total number of surveys available for calls handled by the agent during the reporting interval.

Contact Satisfaction

Contact Satisfaction is the average of contact satisfaction marks from all surveys available for calls handled by the agent during the reporting interval.

Net Promoter Score

The *Net Promoter Score* (NPS) is based on the results of surveys available for calls handled by the agent during the reporting interval.

Ready %

Ready % is the percentage of time that the agent was ready relative to the total logon time.

Busy (Inbound) %

Busy (Inbound) % is the percentage of time the agent was engaged in inbound calls relative to the total logon time. This metric includes hold times but does not include ringing time or after call work time.

Busy (Outbound) %

Busy (Outbound) % is the percentage of time that the agent was engaged in outbound calls, including campaign calls, relative to total logon time. This metric includes dialing time and hold times but does not include after call work time.

Average Ringing Time

Average Ringing Time is the average time that the agent's phone was ringing before calls were answered, abandoned, rejected, or timed out due to no answer. It also includes dialing time for non-campaign outbound calls.

After Call Work %

After Call Work % refers to the percentage of time that the agent spent doing after call work relative to total logon time.

Co-browse

If co-browsing with Surfly is configured, *Co-browse* displays the number of chat interactions with co-browsing sessions handled by this agent.

Internal Chats Report

The *Internal Chats* report provides detailed records of internal chat messages sent by agents. Filters such as *Agent* and *Timeframe* allow you to request this report for interactions that originated from specific agents during specific times.

The Internal Chats report provides detailed records of internal chat messages

Metric Descriptions

The metrics of this report are organized into columns, which are described as follows in the order in which they appear in the report.

Date

Date is the date when the internal chat message entered the system.

Time is given in Universal Coordinated Time (UTC).

Sender

Sender is the name of the agent who initiated the internal chat interaction.

Recipient

Recipient is the name of the agent who received the internal chat message from the sender.

Content

Content is the chat transcript of the internal chat message. The content shown in the report is the text that was typed in the text input field and sent to the recipient agent.

Intra-Team by Service Report

This report provides service-call-handling metrics for selected agent(s) of selected teams. Call related to specific services are reported separately. Only the services associated with the selected teams are included. Direct calls, including transfers, are reported separately in the last section of the report.

All interaction-related metrics in this report are calculated for call and chat media types. For agents' email metrics, use the Agent Email Report.

Metric Descriptions

Number of Calls Handled

Number of Calls Handled is the total number of inbound calls to the given service handled by the agent.

Average Handling Time (Inbound)

Average Handling Time (Inbound) is the average handling time, including after call work, for inbound calls to the given service.

Number of Calls Made

Number of Calls Made is the total number of outbound calls associated with the given service handled by the agent.

Average Handling Time (Outbound)

Average Handling Time (Outbound) is the average handling time, including after call work, for outbound calls associated with the given service.

Number of Surveys

Number of Surveys is the number of surveys available for calls to the given service handled by the agent.

First Call Resolution %

First Call Resolution % is the percentage of surveys that indicated first call resolution relative to the total number of surveys available for calls to the given service handled by the agent.

Contact Satisfaction

Contact Satisfaction is the average of contact satisfaction marks from all surveys available for calls to the given service handled by the agent.

Net Promoter Score

The *Net Promoter Score* (NPS) is based on the results of surveys available for calls to the given service handled by the agent. For more information about NPS, see http://www.netpromoter.com/why-net-promoter/know/

Agent Abandons

Agent Abandons is the number of inbound calls to the given service that the agent answered and terminated within 10 seconds.

Call Rejects / No Answer

Call Rejects / No Answer is the number of inbound calls to the given service that the agent rejected and/or did not answer.

Initiated Transfers

Initiated Transfers is the number of calls to the given service that the agent transferred.

Intra-Team Performance Report

This report provides general performance metrics for selected agents of selected teams.

All interaction-related metrics in this report are calculated for call and chat media types. For agents' email metrics, use the Agent Email Report.

Metric Descriptions

Occupancy %

Occupancy % is the percentage to time that the agent spent handling calls, including after call work, relative to the total working time (i.e., handling calls and being ready to handle calls).

Average Handling Time (Inbound)

Average Handling Time (Inbound) is the average handling time, including after call work, for inbound calls.

Average Handling Time (Outbound)

Average Handling Time (Outbound) is the average handling time, including after call work, for outbound calls.

Total Logon Time

Total Logon Time is the total time that the agent was logged on during the reporting interval.

Number of Surveys

These are the *number of surveys* available for calls handled by the agent.

First Call Resolution %

First Call Resolution % is the percentage of surveys that indicated first call resolution relative to the total number of surveys available for calls handled by the agent.

Contact Satisfaction

Contact Satisfaction is the average of contact satisfaction marks from all surveys available for calls handled by the agent.

Net Promoter Score

The *Net Promoter Score* (NPS) is based on the results of surveys available for calls handled by the agent. For more information about NPS, see http://www.netpromoter.com/why-net-promoter/know/

Call Rejects

Call Rejects is the number of inbound calls that the agent actively rejected.

Initiated Transfers

Initiated Transfers is the number of calls that the agent transferred.

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General Information About Detail Reports

This section describes the reports that contain detailed records for agent activities and contact center interactions:

- Agent Activity Report
- Call Detail Report
- Email Detail Report

These reports are Bright Pattern Contact Center's available out-of-the-box reports.

Despite telephony-oriented names of some parameters (e.g.,*Talk time*, *Hold time*, *External number*), these reports provide data for interactions of various media types. For the correct interpretation of the parameter with respect to a particular media type, refer to the parameter description. Where the distinction between media types exist, the description refers to specific media types using terms *calls*, *chats*, and *emails*. Where the described parameter has the same meaning for all supported media types, the generic term *interaction* is used.

Note: All duration values in detail reports are calculated by subtracting the number of full calendar seconds in the start time from the same number in the end time (i.e., milliseconds are disregarded).

Consider these examples:

- A call that was answered at 11:00:00:005 and released at 11:00:00:998 will have talk time of 0 seconds (00:00:00) in reports.

- A call that was answered at 11:00:00:995 and released at 11:00:01:005 will have talk time of 1 second (00:00:01) in reports.

Scheduling Reports

Reports may be scheduled for distribution at a future date and time. This functionality is particularly useful for contact centers that run specific reports and distribute them to the same users on a regular basis. Scheduling reports automates the process of running reports with specific parameters and distributing reports via email or FTP/SFTP.

How to Schedule a Report

To schedule a report or to update the settings of a scheduled report, follow these steps:

1. In Contact Center Administrator, navigate to *Reports* and select the desired type of report from the main menu (i.e., Agent/Team Reports, Outbound Reports, Scenario Reports, etc.).

2. In the list of reports, select the name of the report you wish to schedule. The report properties will be shown in the bottom pane of the screen.

Select a report name to display report parameters

3. Click **Schedule this report for distribution**. The report scheduling parameters will be shown.

Parameters tab for scheduling reports

4. Select the **Enabled** checkbox.

5. Specify the properties for *Report Schedule* and *Report Parameters*. See section "Parameters tab" below for descriptions of properties.

6. Specify the properties for the Email Delivery tab, if needed. See section "Email Delivery tab" below for descriptions of properties.

Email Delivery options

7. Specify the properties for the FTP Delivery tab, if needed. See section "FTP Delivery tab" below for descriptions of properties.

FTP Delivery tab

8. Click **Apply**.
9. Review the remaining report properties and edit as needed.
10. Click **Run Report**.

Properties

As described in *How to Schedule a Report*, clicking **Schedule this report for distribution** brings up a new dialog with report schedule properties and other report parameters. The dialog includes three tabs: Parameters, Email Delivery, and FTP Delivery. The properties of these tabs are described as follows.

Parameters tab

Parameters tab properties

Enabled

Select the **Enabled** checkbox to enable the report to be scheduled for distribution.

Report Schedule

In this section of Parameters, define when and how often the report will be scheduled to be run.

Recurrence

Recurrence is the frequency that the report will be run and distributed.

Select one of four options:

- Hourly
- Daily
- Weekly
- Monthly

Run at

Specify the time and the timezone in which the report will be scheduled to run.

Repeat every

Specify how often the report should be run, or if the report should be run only once. Available repeat options include every 15 minutes, 30 minutes, 1 hour, 2 hours, etc.

Repeat until

If you selected how often the report run should be repeated, you should specify the time when the report should stop being repeated.

Report Parameters

The Report Parameters section includes only the parameters relevant to the selected report name.

In the example shown, the selected report name is "Agent Activity" and therefore, only the Agent Activity report parameters "Time Frame" and "Agents" are shown.

Email Delivery tab

Email Delivery tab properties

Deliver report via email

Select the *Deliver report via email* checkbox to enable delivery of the report to specified email addresses.

Sender display name

Enter the desired *Sender display name* here. This name can be any name (e.g., organization name, your name, team name, service name, etc.).

Sender email address

The *Sender email address* is the email address that will be used to send the report.

Subject

The *Subject* is the subject line of the email message to be sent.

$()

Variables of the $(varname) format may be used in the *Subject* field and *Message* field.

The Insert Variables button allows you to insert one of the following variables into the *Subject* or the *Message* field:

- $(agents) - This variable displays the name of the agent(s) defined in the Report Parameters section.
- $(services) - This variable displays the name of the service(s) defined in the Report Parameters section.
- $(scenarioName) - This variable displays the name of the scenario defined in the Report Parameters section.
- $(endTime) - This variable displays the time of the last entry in the report .
- $(startTime) - This variable displays the time of the first entry in the report.
- $(timeframe) - This variable displays the timeframe of the report as defined in the Report Parameters section.
- $(timezone) - This variable dislays the time zone as defined in the Report Schedule section.

Click $() to insert a variable in the Subject or Message

Message

The *Message* is the body text of the email message to be sent.

Format

Format is how the report will be provided in the email message to be sent.

Choose one of four options:

- PDF
- Excel
- CSV

- Text

Recipients

Recipients are the people who will receive the scheduled report. Click **edit** to select and add recipients to the list.

FTP Delivery tab

FTP Delivery tab properties

Deliver report via FTP/SFTP

Select the *Deliver report via FTP/SFTP* checkbox to enable delivery of the report via FTP/SFTP.

Format

Format is how the report will be saved and sent via FTP/SFTP.

Choose one of four options:

- PDF
- Excel
- CSV

- Text

Transport Protocol

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

FTP/SFTP Server hostname

FTP/SFTP Server hostname is the is the specified FTP/SFTP server username.

Destination folder and file name

Destination folder and file name is where the scheduled report will be saved.

$()

Variables of the $(varname) format may be used in the *Destination folder and file name* field.

The Insert Variables button allows you to insert one of the following variables into the *Destination folder and file name* field:

- $(agents) - This variable displays the name of the agent(s) defined in the Report Parameters section.
- $(services) - This variable displays the name of the service(s) defined in the Report Parameters section.
- $(scenarioName) - This variable displays the name of the scenario defined in the Report Parameters section.
- $(endTime) - This variable displays the time of the last entry in the report .
- $(startTime) - This variable displays the time of the first entry in the report.
- $(timeframe) - This variable displays the timeframe of the report as defined in the Report Parameters section.
- $(timezone) - This variable dislays the time zone as defined in the Report Schedule section.

Click $() to insert a variable in the Destination folder and file name

FTP username

FTP username is the specified FTP username.

FTP password

FTP password is the specified FTP username.

Test connection

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