

5.3 General Information About Campaign Operation

Bright Pattern Documentation

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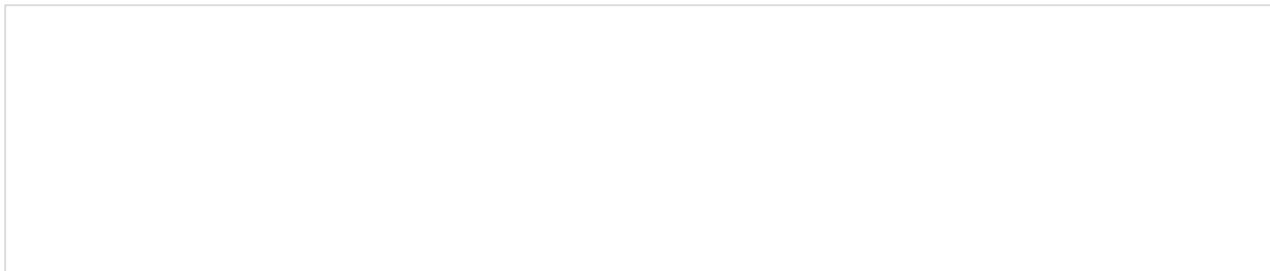
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General Campaign Metrics View

General campaign metrics are displayed in a table in the upper section of the right pane of your Agent Desktop. This general campaign metric view will list, in alphabetical order, all active campaigns assigned to you.

The current status of each campaign is indicated in the *Running* column.

The mode in which the campaign is configured to run is indicated in the *Mode* column.



General campaign metrics view

A campaign can run in one of the following modes:

- **Preview** - The calling records are submitted to the agents participating in the campaign. The agents are given a chance to review record information before dialing the destination numbers.
- **Predictive** - The system automatically dials numbers from list records according to currently optimal dialing rates, monitors call progress, and connects successful (answered) call attempts to available agents. The dialing rate is optimized to maintain the desired agent occupancy based on the statistical analysis of outcomes of most recent dialing attempts.
- **Progressive** - The system automatically dials numbers from list records according to a fixed (preconfigured) dialing rate, monitors call progress, and connects successful (answered) call attempts to available agents. Note that progressive mode is also used for a short period of time at the beginning of campaigns of the *Predictive* type (see above) until the system has enough real-time statistical input to enable the predictive algorithm.
- **Automatic (IVR)** - The system automatically dials numbers from list records, monitors call progress, and connects successful (answered) call attempts to a prerecorded IVR message. Agents are not involved in campaigns of this type.

More Information

For general information about real-time metrics, see section [Understanding Real-Time Metrics](#).

For view customization, see section [Customization of Metric Views](#).

For detailed descriptions of the available campaign metrics, see [List of Campaign Metrics](#).

How to Start and Stop Campaigns

Campaigns can be started and stopped either automatically based on a predefined schedule, or manually. For information about automatic campaign start/stop, see the description of the [outbound campaign settings](#) in the *Contact Center Administrator Guide*.

The current statuses of your campaigns are displayed in column *Running* of the general campaign metrics view. For a campaign selected in this view, the status is also indicated by the name of the toggle button below the metrics table. The button will be named *Start* for an idle campaign, or *Stop* for a running one.

To start a campaign manually:

1. Select this campaign in the general metrics view.
2. Make sure it is currently idle, and click the **Start** button.

The selected campaign will start immediately, provided that there are agents available to handle calls of this campaign. Note that the actual call attempts to phones of specific types are made according to the schedules specified in the [campaign calling hours](#).

To stop a running campaign manually:

1. Select this campaign in the general metrics view.
2. Make sure it is currently running, and click the **Stop** button.

The system will stop making new call attempts for any records of this campaign immediately. All call attempts that may have been in progress will be finished normally.

Note that the use of the manual campaign start/stop controls does not cancel automatic start/stop configuration. For example, consider a campaign configured to start automatically at 2 p.m. and stop at 6 p.m. If this campaign was started manually at 1:30 p.m., it will still be stopped automatically at 6 p.m. unless it is stopped manually before.

Lists View

[Real-time metrics](#) for specific lists within a selected campaign are displayed in the lower section of your Agent Desktop in a table called *Lists*. To view these metrics, first select the desired campaign in the [General Campaign Metrics View](#). The *Lists* table will show all lists associated with the selected campaign in alphabetical order.



Campaign Lists View

Like the [General Campaign Metrics view](#), Lists View also has a section where you can define a set of custom metrics for each list-campaign association individually. To define a custom view for a particular list, first select this list in the general list metrics view. Then, click the **down arrow** and select the desired "add" or "hide" options.

Metrics available in the Lists View are a subset of the campaign metrics focused on records (as opposed to call attempts), except that they only apply to records of an individual list within the selected campaign. For descriptions of these metrics, see section [List of List Metrics](#).

The following data is specific to the campaign list view:

- Parameter *Enabled* is an indication of whether the given list is currently enabled or disabled within the selected campaign. For more information, see section [Enabling and Disabling Lists within a Campaign](#).
- Parameter *Order* means the order in which this list will be used within the given campaign relative to the other lists assigned to the same campaign. This is a static property defined in the [campaign configuration](#). Records from lists with the same order will be dialed in a round-robin fashion.
- For lists with the same *Order* (see above), parameter *Ratio* defines the ratio at which records from these lists will be attempted. For example, if you have two lists with order 1, the first list has a ratio set to 2 and the second list has a ratio set to 3. Two records from the first list will be attempted, then three records from the second list will be attempted, then two records from the first list will be attempted, and so forth. This is a static property defined in the [campaign configuration](#).
- The bar chart shows campaign list progress and efficiency expressed as attempts per completion. The horizontal axis shows passes through the campaign list records. A pass is a part of the campaign during which all campaign list records are attempted once. For each pass, the vertical axis shows the percent of records that were completed by agents, auto-completed (due to a DNC match or reaching maximum attempts), rescheduled, and remaining (not attempted on the given pass).

How to Enable and Disable Lists within a Campaign

By default, all lists associated with a campaign are considered disabled (i.e., they have to be activated within the given campaign before any records from those lists will be dialed).

The current statuses of lists are displayed in column *Enabled* of the general campaign metrics view. For a list selected in this view, the status is also indicated by the name of the toggle button below the metrics table. The button is named either *Enable* for an inactive list or *Disable* for an active list.

To enable an inactive list:

1. Select this list in the List Metrics view.
2. Click the **Enable** button.

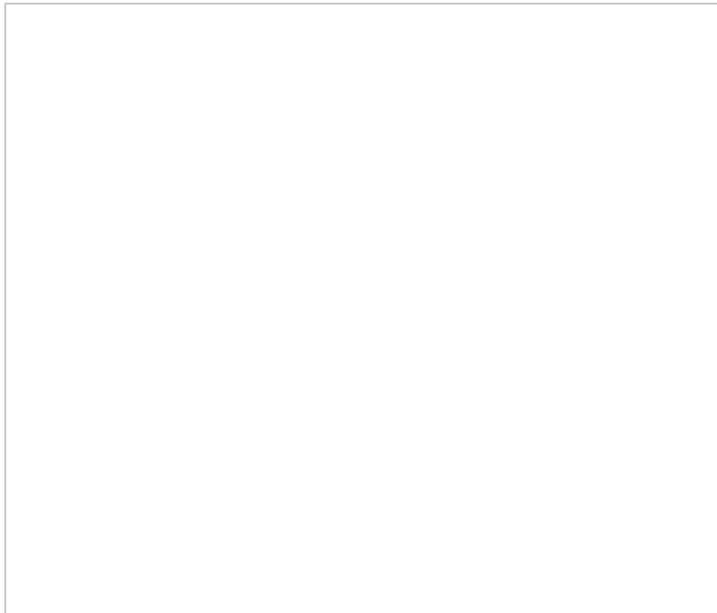
The order in which the system will start dialing records from this list relative to other active lists will be defined by the [Order](#) and [Ratio](#) settings.

To disable an active list:

1. Select this list in the List Metrics view.
2. Click the **Disable** button.

The system will stop making new call attempts for any records of this list immediately. All call attempts that may have been in progress will be finished normally.

Note that lists can also be enabled and disabled via the [list-campaign association page](#) of the Contact Center Administrator application.



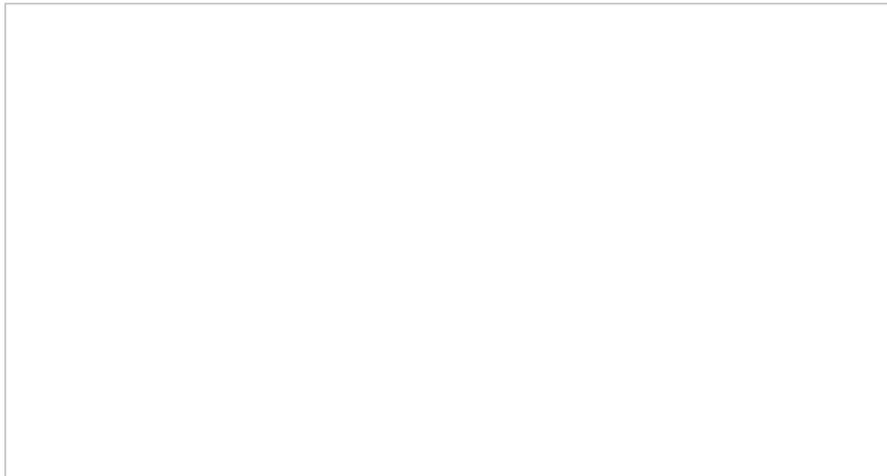
Location of the enable/disable button

Campaign Teams View

[Real-time metrics](#) for specific agent teams assigned to a selected campaign are displayed in the lower right section called *Teams* of your Agent Desktop. To view these metrics, first select the desired campaign in the general metrics view. The *Teams* table will show, in alphabetical order, all agent teams assigned to the selected campaign.

Like the [General Campaign Metrics view](#), the Campaign Team view also has a section where you can define a custom metrics view for each list-campaign association individually. To define a custom view for a particular list, first select this list in the general metrics view.

Metrics available in the Campaign Team View are a subset of the service metrics focused on agent participation. For descriptions of these metrics, see section [List of Team Metrics](#).



Campaign Teams view

Note the following considerations regarding the campaign team metrics:

- The term *agents* in the metric definitions shall be interpreted as *agents of this team qualified to participate in the selected campaign* (i.e., those who have the corresponding campaign skill with any level higher than zero). Note that not all agents assigned to the team may have such a skill.
- The term *outbound calls* in the metric definitions shall be interpreted as *any outbound calls handled by the agents of this team qualified to participate in this campaign* (see above). Note that if the agents participate in a number of campaigns or make manual outbound calls related to inbound services, all such calls will be counted as outbound calls in these metrics.

How to Add and Remove Campaign Teams

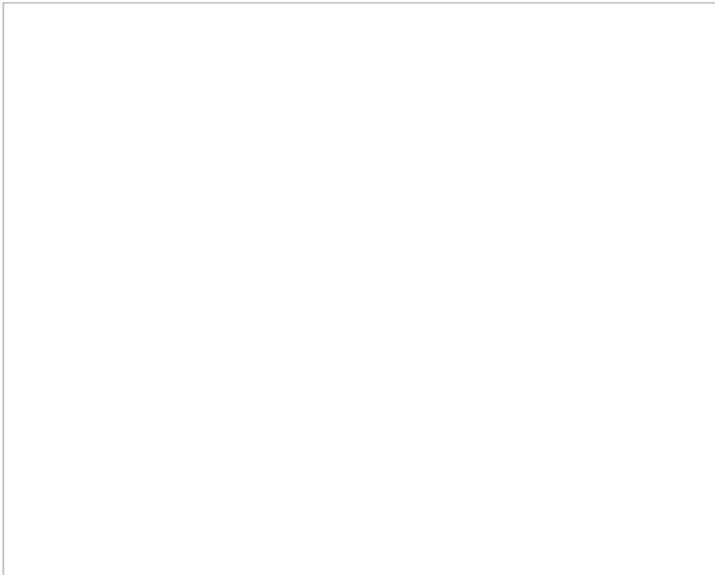
Initially, teams are assigned to a campaign during the [campaign configuration process](#). For more information, see the *Contact Center Administrator Guide*, section [Assignments Tab](#).

As a campaign operator, you can assign additional teams to active campaigns and remove previously assigned teams.

To assign a new team to a selected campaign:

1. Click the green **add team** button at the bottom of the campaign teams view.
2. Select the desired team from the list that appears.
3. The team will appear in the campaign teams view. All agents of the team will have the campaign skill assigned to them automatically with the highest level. You can change this skill assignment manually.

For more information, see section [Skill Levels](#) of the *ServicePattern Contact Center Administrator Guide*.

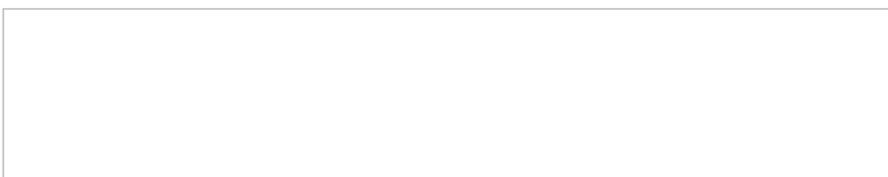


Adding a team to a selected campaign

To remove a previously assigned team:

1. Select this team in the campaign teams view.
2. Click the red **remove team** button .
3. A warning message will appear and you will need to confirm the removal of the team.
4. The selected team will be removed from the campaign and will no longer appear in the campaign teams view.

Note: When teams are assigned to multiple enabled campaigns, the cumulative load of such campaigns must be distributed evenly among those teams. For more information and examples of valid and invalid team assignments, see the *Contact Center Administrator Guide*, section [Assignments Tab](#).



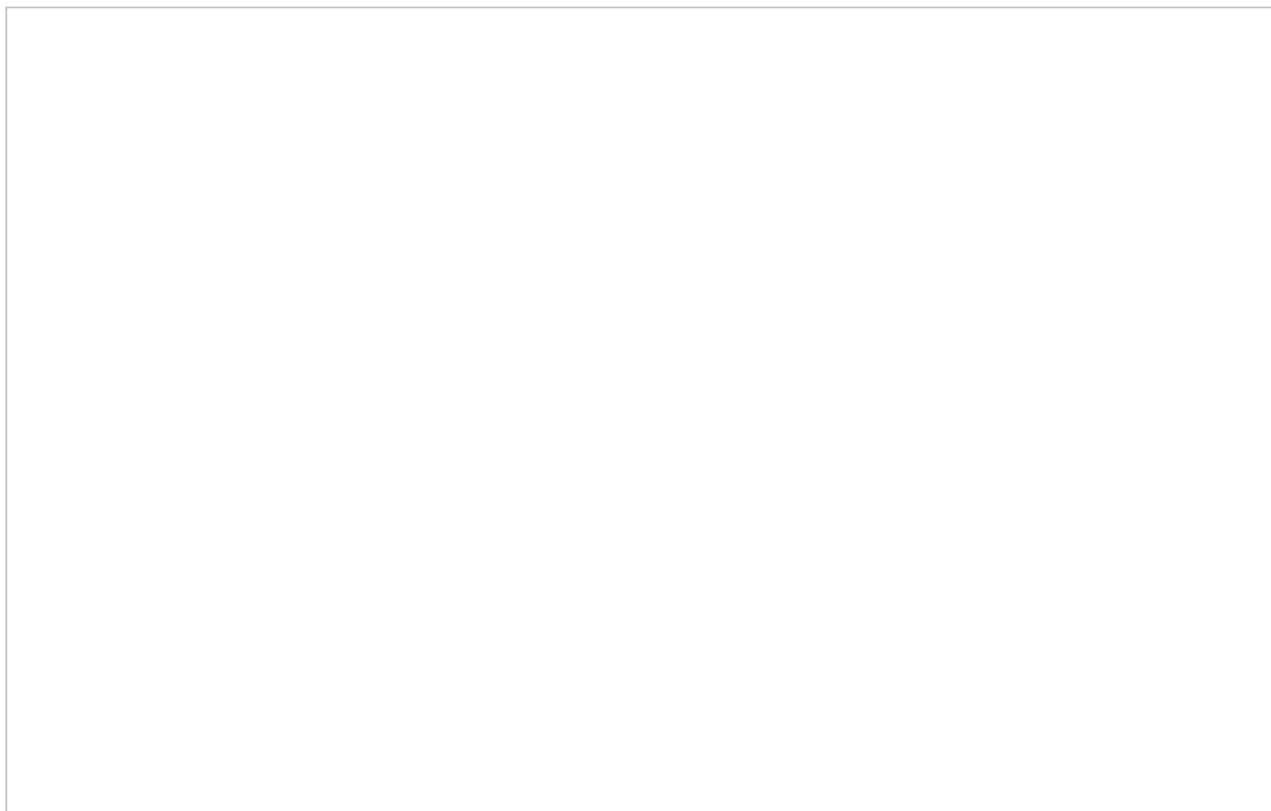
A warning message will appear before you remove a team from a

campaign

General Information About Metric Viewing

As a supervisor, you can view [real-time metrics](#) for the [members of your teams](#), the [services assigned to your teams](#), and the [individual skills](#) within those services. These metrics are found in the Supervision section of Agent Desktop.

The Supervision section displays metrics for either one team or all teams at a time. If you have more than one team under your supervision, you can select the desired team. If you have the privilege "All assigned teams combined view," you can select the *All Teams* view in order to view metrics for agents from all your teams. Real-time metrics are updated every few seconds.



A view of various real-time metrics in the Supervision section

Understanding Real-Time Metrics

Real-time metrics are constantly updated in real-time (every few seconds) to reflect the current status of your contact center operations. The system provides real-time metrics of two types: cumulative and instantaneous.

- *Cumulative metrics* include all events matching the described condition since the moment within the previous 24 hours when the real-time statistics were reset according to your contact center configuration. Most of the cumulative metric names end with a verb in the perfect form and their descriptions are given in the present perfect form (e.g., *IN Queued: Number of inbound interactions that have entered the service queue*).
- *Instantaneous metrics* only count the resources that match the described condition at the present moment. Most of the instantaneous metric names end with an adjective or a verb in the progressive form and their descriptions usually have words *current* or *currently* (e.g., *IN Waiting: Number of inbound interactions that are currently waiting in the service queue*). (Compare this example to the cumulative *IN Queued* metric.)



Agent Desktop displays metrics such as these in real-time

Names of many metrics have prefixes *IN*, *OUT*, or *CB*.

- Metrics whose names start with *IN* are related to inbound interactions.
- Metrics whose names start with *OUT* are related to outbound interactions. Unless explicitly stated otherwise in a metric description, these metrics count both regular outbound interactions made by agents (e.g., consult calls made with respect to inbound services) and campaign calls that may be dialed by the system and distributed to the agents when answered.
- Metrics whose names start with *CB* are related to inbound calls that selected the *Virtual Queue* option (i.e., callback requests).

For more detailed metric descriptions, follow these links:

- [Team Metrics](#)
- [Service Metrics](#)
- [Skill Metrics](#)
- [Agent Metrics](#)
- [Campaign Metrics](#)
- [List Metrics](#)

Additionally, a list of [All Real-Time Metrics](#) and their definitions is available in the *Reporting Reference Guide*. [Information About Real-Time Metrics](#), also located in the *Reporting Reference Guide*, provides general details about how these metrics function.

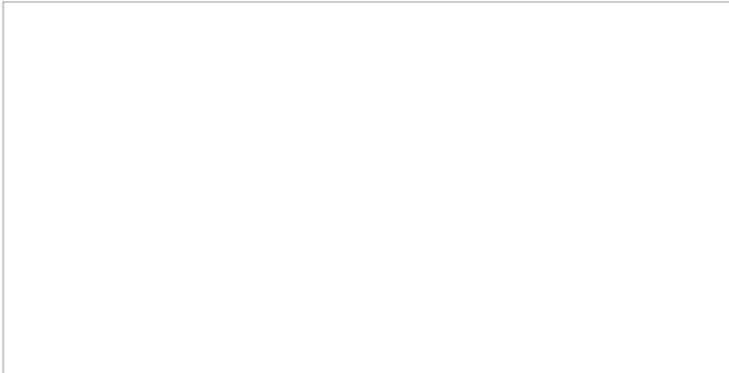
Customization of Metric Views

Depending on your permissions, you may be able to customize real-time metric views by removing undesired metrics, adding other metrics that you may want to see, and changing the order in which metrics are arranged in the table. You may also be able to set such a customized view as a default view for all other supervisors of your contact center.

Adding and Removing Metrics

To remove a particular metric:

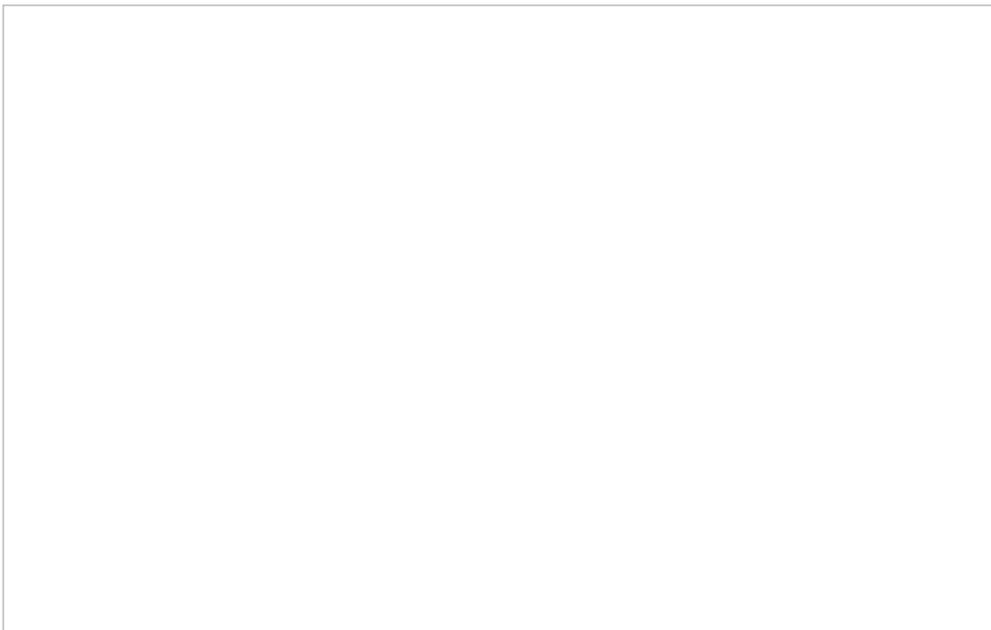
1. Hover your cursor over the corresponding column name and click the drop-down menu icon that will appear.
2. Select the **Hide metric** option.



How to hide metrics

To add a metric:

1. Hover your cursor over the name of the column next to where you want to add this new metric, and click the drop-down menu icon that will appear.
2. Select the **Add metrics...** option. A list of available metrics will appear with checkboxes next to their names.
3. Locate the desired metric in the list and select its checkbox.
4. Click **OK**.



Select the metrics to be shown in Agent Desktop

Rearranging Metrics Columns and Reverting to Default Views

To rearrange the order of columns in the metrics view, use the mouse to click on and drag the name of the columns to the desired locations.



Click and drag to
arrange metrics

You can also restore the original metrics set with the original order of columns. To do so, open the drop-down menu next to any metric and click the **Restore default view** option.

Saving a New Default View

Once you have completed all of the desired configuration changes, you can set the new view as the new default view for all other supervisors of your contact center. To do so, open the drop-down menu next to any metric and click the **Set view as default system-wide** setting. Note that this function requires a separate permission.

The list of metrics that appears when you click the **Add metric...** option contains brief descriptions for all real-time metrics available for the selected object (service, campaign, or agent). For the descriptions of metrics currently displayed in the metrics views, you can simply hover over the corresponding column titles.

For more detailed metric descriptions, follow these links:

- [Service Metrics](#)
- [Skill Metrics](#)
- [Agent Metrics](#)
- [Campaign Metrics](#)
- [List Metrics](#)
- [Team Metrics](#)

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Location of the enable/disable button

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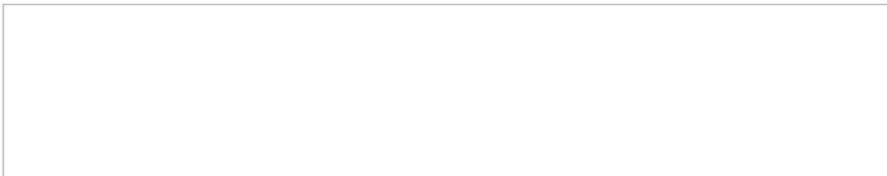


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A warning message will appear before you remove a team from a campaign