

# 5.3 Managing Calendar Events

## Bright Pattern Documentation

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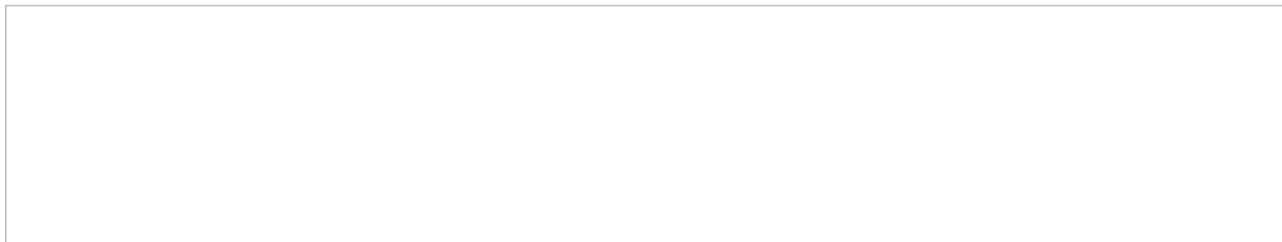
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## Agent Metrics View

Agent metrics are displayed in the Supervision  section of Agent Desktop and displayed at the bottom of the Context Information Area. Agents are listed in alphabetical order and by default, this view will show only the agents who are currently logged in to Agent Desktop. If you wish to see the current day's metrics for the agents who are logged out, select the **logged-out users** checkbox. For a list and definitions of all agent metrics, see [List of Agent Metrics](#).

## All Teams Agents

If you have been assigned to supervise more than one team, and if you have the privilege "All assigned teams combined view," then you may see metrics for all agents at once. Not only does this view show agents from all teams assigned to the logged in supervisor, the *All Teams Agents* view shows all services that the teams are assigned to (note that individual services can be hidden, if needed).

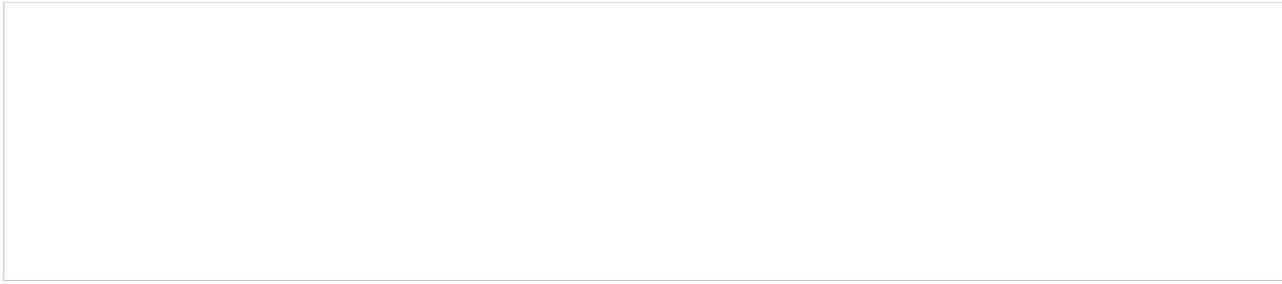


All Teams agents view

The number of agents on display is limited to 100. This is a contact center-specific limit that may be adjusted by your service provider. Note that your ability to see agents from all assigned teams is controlled by your service provider. See your service provider for more information.

## Individual Teams Agents

To view agent metrics from an individual team you have been assigned to supervise, select the desired team from [Teams](#) and agents from this team will be shown at the bottom of the Context Information Area. The default view will show only agents currently logged in.



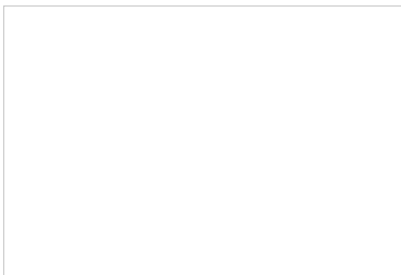
A view of agent metrics from the Customer Service team

## Subteams

A subteam is a subset of agents from an individual team that is assigned to a supervisor. In Agent Desktop, a user who has been granted the supervision privilege *Define/View subteams of selected agents* can select agents from a larger team to be on a subteam. Supervisors may also switch between subteam view and full team view in order to focus their attention on real-time metrics for specific agents within a large group. In addition, supervisors with such privilege may request agent reports for selected agents, as well as send internal chat broadcasts to agents in selected subteams or teams. This capability makes it easier for supervisors to monitor and track a specific range of agents on a team.

### Viewing Subteams

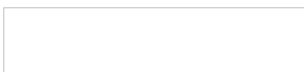
A supervisor may switch between full team view and subteam view by selecting the *my subteam only* checkbox.



Select the checkbox to view only agent metrics for the subteam

### Subteam Editing Mode

A supervisor looking at a team in may switch to Subteam Editing mode by clicking the **pencil icon**, which is next to the *my subteam only* checkbox.



### Adding and Removing Agents

Supervisors can select agents using checkboxes from the entire list of agents. The list may show logged out agents if the corresponding *logged out users* checkbox is selected. OK and Cancel buttons appear to enable exit from Subteam Editing mode.

To add agents to a subteam, select the checkbox beside each agent listed on the team. Likewise, to remove agents from a subteam, unselect the checkbox beside each agent listed on the team.



Editing a subteam

See the *Reporting Reference Guide*, section [Agent Activity Report](#), for information on viewing subteam metrics in reports.

## Default Agent Metrics

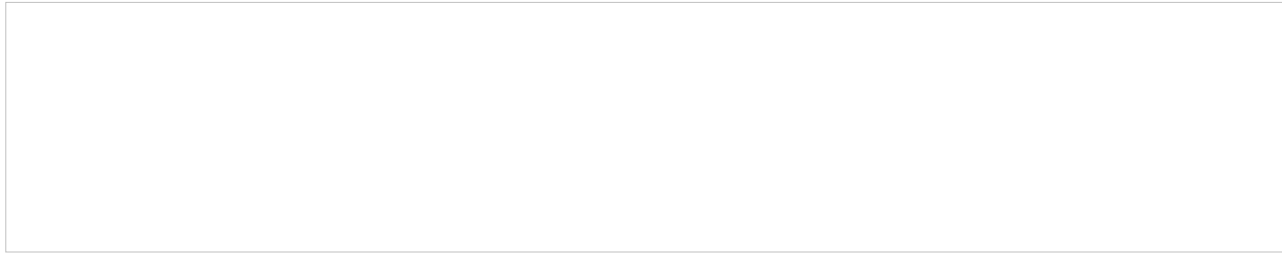
Upon selecting either [All Teams](#) or an [individual team](#), the following metrics will be displayed for agents:

- Agent state icon
- Agent interaction type
- Name
- Sentiment
- Time in State
- IN Handled
- IN Rejected
- OUT Rejected
- OUT Handled
- Occupancy
- Active
- Interaction
- Service
- Talk
- Hold
- Rec

Additional metrics can be added, [customized](#), arranged as you see fit. For a complete list of agent metrics, see [List of Agent Metrics](#).

## Sorting

You can have agents sorted automatically by the value of any currently displayed metric. To sort the metrics, click on the name of the metric; the default sort view is high to low. To sort low by high, click on the metric name again. By default, agents are sorted alphabetically.



A view of metrics as sorted by Time in State

## Icons

The current agent state is displayed as an [icon](#) next to the agent name. To view the current agent states in text form, select **Agent State** from the list of the available [agent metrics](#). For the *Not Ready* state, the Agent State column will also display the current *Not Ready* reason if such a reason is configured in your system. For detailed descriptions of agent states, see the Bright Pattern Contact Center *Agent Guide*, section [Understanding and Handling Your States](#).

If an agent is handling an interaction, the interaction type is displayed as an icon next to the agent's *Busy* or *After Call Work* state.

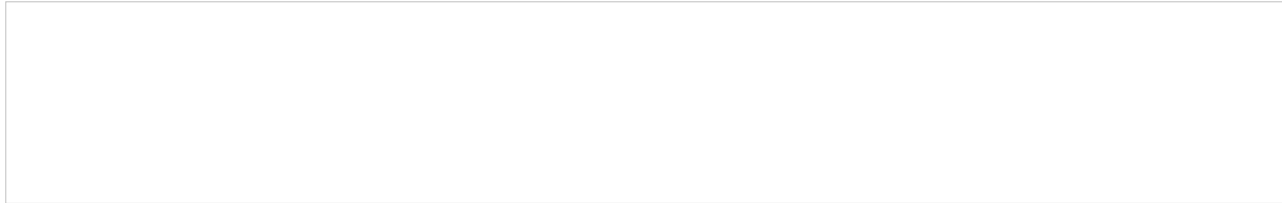
The interaction state icons have the following meanings:

- Outbound interaction in progress (dialing, talk or hold)
- Inbound interaction in progress (ringing, talk or hold)
- The customer has disconnected from interaction and the agent is performing After Call Work related to this interaction. Note that this icon is a user state.
- The call is on hold.
- Chat or SMS/MMS interaction in progress
- Email interaction in progress
- The logged in user has no phone.

**Note:** If your team includes members who are not agents or supervisors, their current status will be displayed using a different set of icons, which simply indicate users' availability to communicate. For detailed descriptions of such non-agent statuses, see the Bright Pattern Contact Center *Agent Guide*, section [How to Use the Directory](#).

## Multiple Interactions

Note that an agent may have more than one active interaction on Agent Desktop. If the agent is handling multiple interactions, the displayed value relates to the interaction that is currently in focus at the agents' desktop (i.e., selected in the agent's *Active Communications List*). The number of the agent's current active interactions is reported via the *Active* metric. If this metric shows more than one interaction for a particular agent, clicking on the value of this metric will "unfold" the agent's row into a list showing information about all interactions that are being handled by the given agent.



Agent metrics view showing multiple current interactions for one agent

For detailed descriptions of the available agent metrics, see section [List of Agent Metrics](#).

## Managing Calendar Events

The Agent Desktop application is equipped with a calendar that agents can use to schedule various tasks and events related to their work, such as follow-up calls with customers. For general information about the calendar, see the Bright Pattern Contact Center *Agent Guide*, section [How to Open the Calendar](#).

### Working with Agent Calendars

In addition to using your own calendar for your personal scheduled events (as a supervisor), you can also view calendars of members of your team and reassign their scheduled tasks to other agents.

#### How to View an Agent's Calendar

There are a couple ways to view the calendar of an agent on your team. You can access their calendars from your own personal calendar, or you can navigate to their calendars from the agent management functions available on your *Supervision* screen.

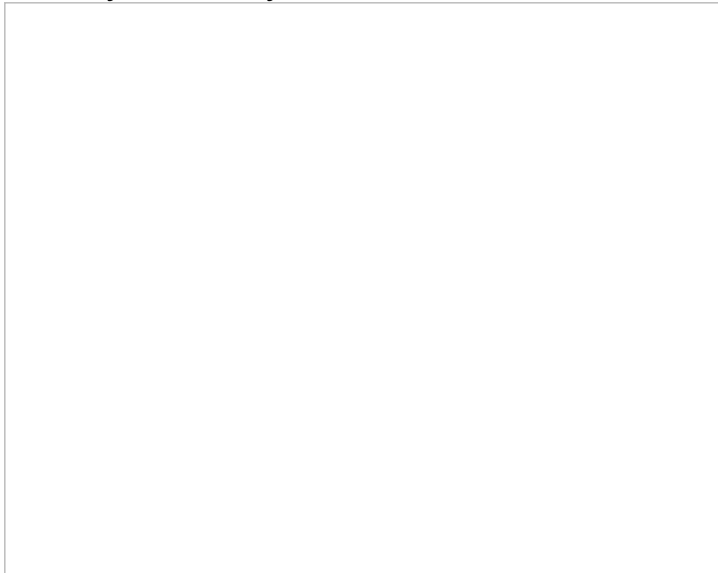
##### From Your Own Calendar

1. To view an agent's calendar from your own calendar, click the **Calendar** icon  on Agent Desktop's main menu. Your calendar will be shown in the Context Information Area.



#### Calendar

2. At the top of the calendar, to the right of your name, select the down arrow to display a drop-down list of users in your directory.



#### Select a user from the directory


3. Select the name of the agent whose calendar you wish to view. The agent's calendar will be shown in your Context Information Area. You can tell whose calendar you are viewing by looking at the name shown at the top of the calendar.





Viewing an agent's calendar

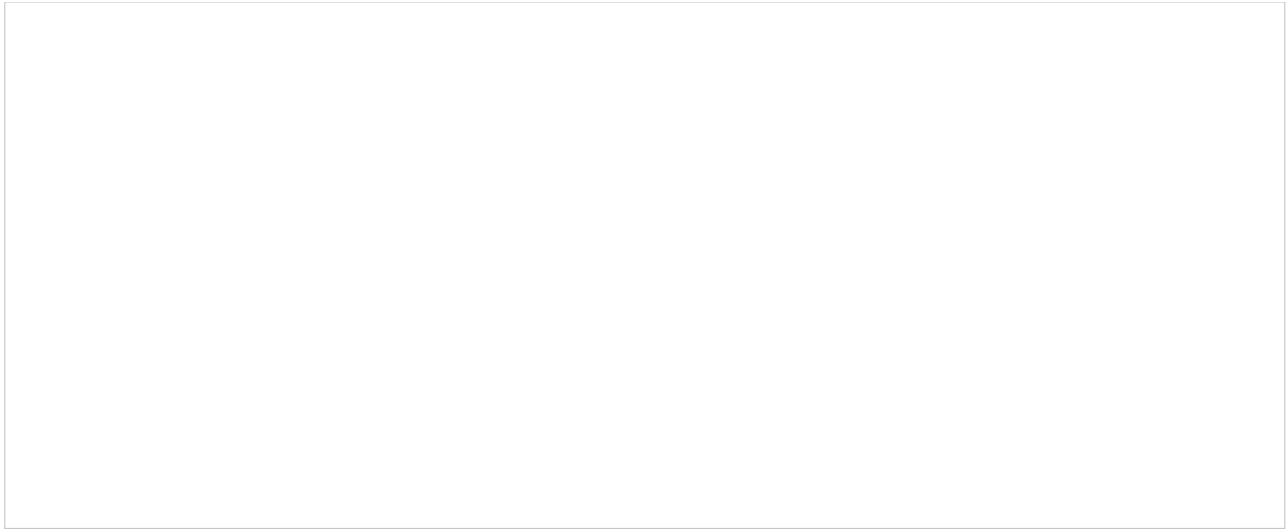
### From Your Supervision Screen

1. To view an agent's calendar from your *Supervision* screen, click the **Supervision** icon  in Agent Desktop's main menu. Metrics about your teams, services, and agents will be shown in the Context Information Area.



Supervision metrics in the Context Information Area

2. Select the desired agent from the [Agent Metrics View](#). A pop-up card will display agent management functions for the selected agent.



Agent management functions

3. Click the **Show Agent's Calendar** button . The agent's calendar will be popped to your *Context Information Area*.

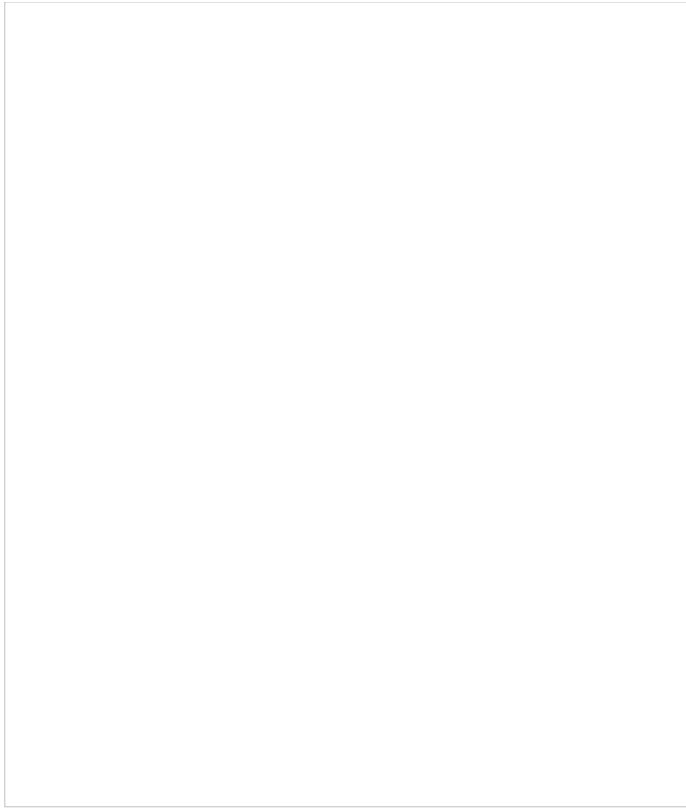
## How to Reassign an Event

1. To reassign a single agent's event to another agent, view the agent's calendar. See section [How to View an Agent's Calendar](#).
2. Select the event in the agent's calendar that you want to reassign. The event properties on the right will display the event information.



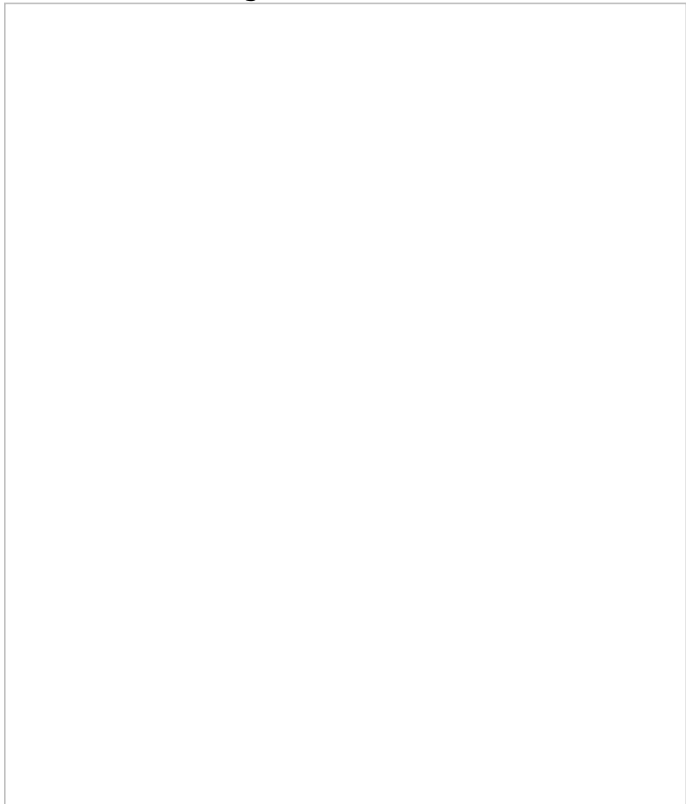
Calendar and event properties

3. Click the **Assign...** button. A dialog window will appear, showing the list of agents to which this task can be assigned. To find a specific agent quickly, you can start typing the agent's name in the **Enter search term** field and matching users will be listed in search results.



You can search for a specific agent

4. Select the desired agent and click **Ok**.

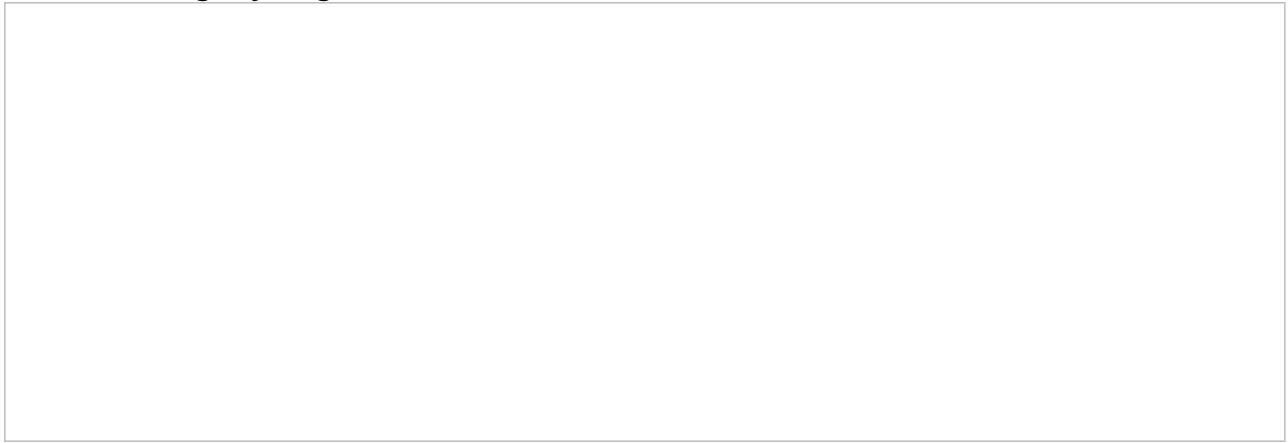


Reassign an event to a selected agent

### **How to Reassign All of an Agent's Events to Another Agent**

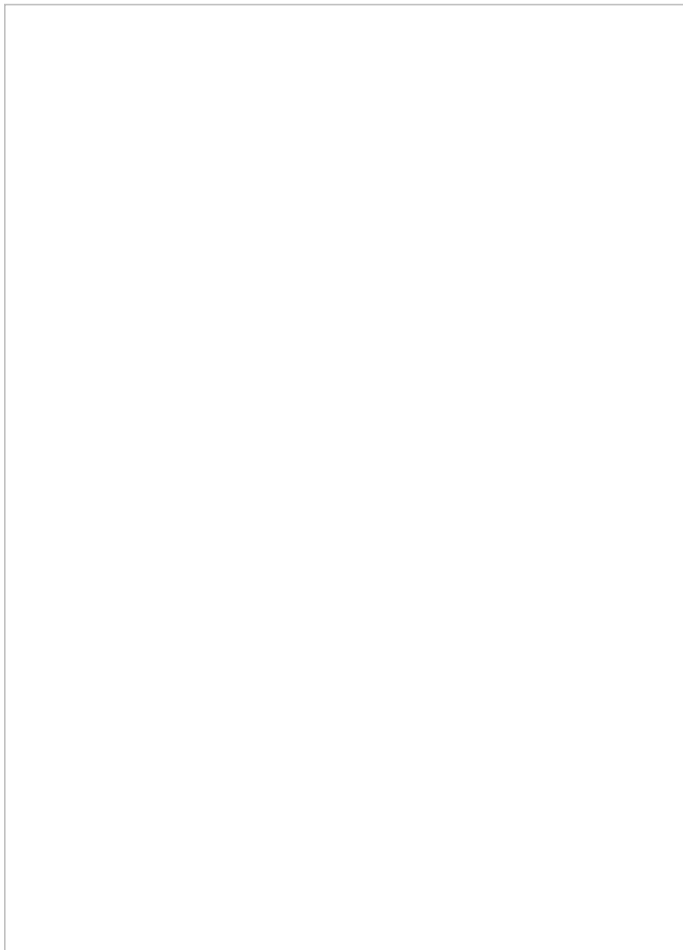
Sometimes it may be more convenient to reassign all of the agent's events within a time range in a single step.

1. Click the **Reassign by range...** button.



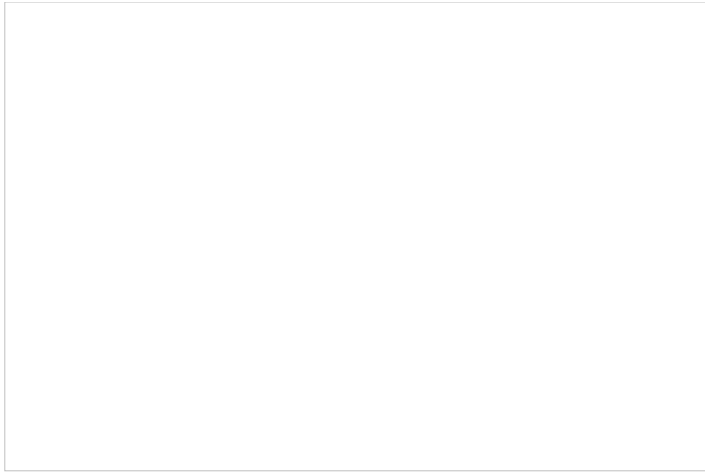
Reassign by Range button

2. A dialog window will appear showing the list of agents that this task can be assigned to and time range controls.



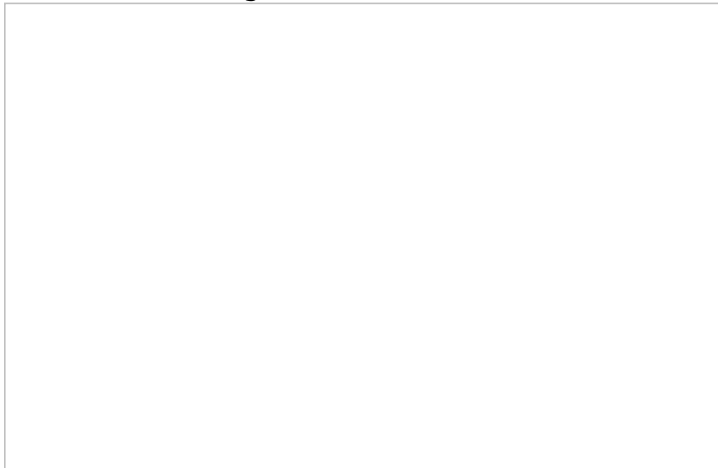
Select an agent to be assigned a range of events

3. Specify the desired time range by either typing in the date or clicking into the date field and selecting the date from the mini calendar.



Select the date range

4. Select the desired agent and click **Ok**.



Select the agent