5.3 Tutorials for Supervisors

Bright Pattern Documentation

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Table of Contents

Purpose

The Bright Pattern Contact Center guide *Tutorials for Admins* provides instructions for using the Agent Desktop application to perform typical contact center supervisory functions including the following:

- Managing agents
- Monitoring teams, services, and more, using real-time metrics
- Operating campaigns
- Maintaining email queues and calendars

For descriptions supervisor related areas of Agent Desktop, see the Bright Pattern Contact Center *Supervisor Guide*.

How to Change an Agent's State

As a supervisor, you can change the current state of any agent of your team. For example, if the Service Level drops below the specified threshold, you can force some agents to become Ready while they are in the After Call Work state in order to speed up the distribution of calls waiting in the service queue. You can also force an agent to log out.

To change an agent state:

1. Click the **Agent State** icon in the Agent Metrics View.
2. Select the desired agent state from the drop-down menu. Note that forced state changes may or may not be available depending on the current agent activity. For example, no forced state changes will be permitted for agents actively handling service interactions.

Changing agent state

How to Turn On/Off Supervision Modes

Supervisors have three different modes of call monitoring to use with their agents: monitor, coach, or barge-in.

To activate one of the supervision modes:

- Select an agent from the *Agent Metrics View* in the right pane of Agent Desktop. The agent must be handling a service call and be in the Busy state.

- The *Contact Info Panel* will display the monitoring functions.
  - If the *Monitor/Coach/Barge-in* button displays the desired supervision mode, click the button.

- If you wish to be connected in a different supervision mode, click the arrow section of the *Monitor/Coach/Barge-in* button, and select the desired supervision mode from the drop-down menu.

Call Monitoring and Pull Screen controls

When you are connected to a call in a particular supervision mode, the *Monitor/Coach/Barge-in* button will display the “next” supervisor mode (i.e., if the current mode is *Monitor*, the button will display *Coach*, and so on).

- To switch to this “next” mode, click the button itself.
- To switch to a different supervision mode (e.g., from *Monitor* directly to *Barge-in*), click the arrow section of and select the desired supervision mode from the drop-down menu.

The system will automatically start call recording as soon as you connect to this call in any supervisor mode. Note also that the system supports simultaneous monitoring of one agent by more than one supervisor.

To stop the supervision activity for this call:

Click the **End Call** button.

How to Continuously Monitor Agents

As a supervisor, you can continuously monitor calls of a selected member of your team. When you activate this function, monitoring of all subsequent calls made or received by this team member will start automatically.

To set continuous monitoring for a particular agent:

1. Select the desired agent from the *Agent Metrics View* in the right pane of Agent Desktop. The *Contact Info Panel* will display the monitoring functions.
2. Select the **keep monitoring this agent** checkbox.

Note that you can only continuously monitor one agent at a time. Thus, if you activate this function for another agent, monitoring of the originally selected agent will stop.

To stop monitoring the agent:

Simply deselect the checkbox.

How to Grade Calls in Progress

You can grade various aspects of your agents' performance while monitoring their calls. The assigned grades will be stored as part of the historical call detailed record and will be visible to other managers of your contact center with corresponding privileges.

To grade a call that you monitor:

1. Click the **Grade** button next in the *Contact Info Panel*.
2. Select grades for the desired categories.
3. If necessary, type a free-form comments about the call in the *Notes* field.
4. Click **Ok**.

Note: The call grading categories are customizable and may differ from the ones shown above. If in doubt about the purpose of a specific category, contact your administrator.

How to Monitor Agent Screens

Depending on your system configuration, you may also be able to view screens of selected members of your team and monitor their desktop actions in real time. You can activate this function for a logged-on agent at any time even when the agent is not handling any interactions. Thus, this function can be complementary to the call monitoring, or it can be used on its own. The agents will not receive any indication that their screens are being monitored.

To begin screen monitoring:

1. Select the desired agent from the *Agent Metrics View* in the right pane of Agent Desktop. The *Contact Info Panel* will display the monitoring functions.
2. Click the **See Screen** button . A new window will open, showing you the desktop of the selected agent.

Note that you can only continuously monitor a screen of one agent at a time. Thus, if you activate this function for another agent, monitoring of the originally selected agent will stop.

To stop monitoring the agent's screen:

Simply close the browser window.

Customizing Metrics

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, see the following articles in the *Supervisor Guide*:

- Service Metrics
- Skill Metrics

- Agent Metrics
- Campaign Metrics
- List Metrics
- Team Metrics

Customizing Real-Time Metric Alerts

You can set thresholds for some of the service, campaign, and agent metrics and be visually alerted whenever the current values of the corresponding metrics reach those thresholds.

How to Set Threshold Values

1. Click the **Settings** in the upper right corner of the Agent Desktop.
2. Select **Alert Configuration** from the drop-down menu.
3. Click in the area adjacent to the name of the statistic for which you would like to set or change the threshold and select the **Custom** box.
4. Enter the desired threshold value.
5. Click **Apply**.

Alert configuration

Changing Alert Colors

You can customize the color of the text and background of alerts. Do do this, follow these steps:

1. Click the **Settings** in the upper right corner of the Agent Desktop.
2. Select **Alert Configuration** from the drop-down menu.
3. Click in the area adjacent to name of the statistic that you would like to change the color of and select the **Custom** box.
4. From here, click the **Color** field to access *Alert Colors*.
5. Select the color of the text or the background (or both) as it shall appear when the actual metric value reaches the specified threshold, and click **OK**.
6. Back in Alert Configuration, click **Apply**.

Customize alert colors

How to Set System-Wide Thresholds

Depending on your privileges, you may be able to make the thresholds that you define available system-wide (i.e., to all other supervisors in your contact center). Note that they may still be able to customize these thresholds for their own desktops. To apply your thresholds system-wide, follow these steps:

1. Click the **Settings** in the upper right corner of the Agent Desktop.
2. Select **Alert Configuration** from the drop-down menu.
3. Click in the area adjacent to the name of the statistic for which you would like to set or change the threshold and select the **Custom** box.
4. Enter the desired threshold value.
5. Click the **Set as System Default** button.

Changing threshold settings

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.

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

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

How to Manage Queues

As a supervisor, you can view and manage personal email queues (i.e., the *My Queues*) of all agents of your team. You can view the emails in the agent's queue, assign those emails to other agents, and/or transfer them to other services.

Managing My Queues (Personal Email Queues)

To manage your own *Personal Queue* and/or your *Team Queue*, select the **My Cases** entry. Your personal and team queues will be displayed in the *Contact Info Panel* area. You may have to drag the sizing panels up or down to view both queues at the same time.

For each queued email, the customer's name and the subject line will be shown. A bar indicator next to each email will indicate how close the current wait time is to breaching the SLA. (The SLA is your contact center standard time for replying to customers' emails). The unshaded portion of the indicator represents the time remaining to the SLA breach. This time also defines the default order in which emails appear in the queue.

An example of SLA bar indicators

If your team is assigned to handling emails for multiple services, you can adjust your team queue to display emails for any one of those services or for all assigned services at once. The name of the currently selected service will be displayed under the queue title. To view another service, click on the currently selected service name and select the desired service from the drop-down menu.

Switch between the services assigned to your team from the drop-down menu

You can sort emails in the team queue by the following:

- Create time
- Update time
- Last customer update
- SLA Age %
- From
- Subject
- Flag

You may choose either ascending or descending order of email appearance in each case.

Email sorting options

How to Review and Assign Emails to Agents

To review the contents of an email, click it once. The email will appear in the reading pane on the right side of the screen. For more information about reviewing email content, including case history, attachments, and supplemental web pages and forms, see the *Agent Guide*, section How to Review an Incoming Email.

Search for the agent whose emails you want to review from your Personal Queue

To assign the selected email to a member of your team, select the checkbox next to the email then click the **Assign email to agent** button.

Assign button

In the dialog window that appears, open your team folder, and select the desired agent. Alternatively, you can enter agent's name in the *Search* field. Click **Assign** to confirm the assignment, or click **Cancel** to close the dialog window.

Email assignment

The email will be moved to the agent's *Personal Queue*. Note that the position of this email in the agent's queue will be determined by the remaining time to SLA breach (see above) relative to the other emails that the agent may have in the queue. If you wish to get agent's immediate attention to the assigned email, consider sending the agent an internal chat message. For more information, see section Personal Chat.

If you wish to process the selected email yourself, click the **Grab** button in the reading pane. The email will be moved to your *Personal Queue*.

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

To reassign a single agent’s event to another agent, view the agent's calendar. See section How to View an Agent's Calendar.

1. 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

2. 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

3. 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