5.8 Reporting Reference Guide

Bright Pattern Documentation

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Purpose

The Bright Pattern Contact Center *Reporting Reference Guide* describes the reports available out of the box with the Bright Pattern Contact Center solution. These reports contain key performance indicators for the main contact center resources, such as agents, agent teams, services, and scenarios.

The guide also explains how to interpret campaign results, search for interaction records, and review associated call recordings and chat transcripts.

Audience

The Bright Pattern *Reporting Reference Guide* is intended for personnel responsible for contact center operations including:

- Definition of contact center services and interaction processing scenarios
- Contact center workforce management
- Assessment of contact center efficiency and quality of customer service
- Outbound campaign definition and execution
- General contact center management

General Information About Access to Reports and Records

The web application that you use to access reports and call recordings is called *Contact Center Administrator*. For general information about this application, see the *Contact Center Administrator Guide*.

To generate and view reports or to access interaction records, log into Contact Center Administrator and select the *Reports* view from the upper bar menu.

Note that depending on the tasks you are going to perform, you must have an assigned role that contains some or all of the following privileges: *View historical reports*, *View interaction records*, *Listen to call recordings and view chat transcripts*, and *Grade interactions*. For more information about role definition and assignment to users, see sections Roles and Users of the *Contact Center Administrator Guide*.

- To generate and view reports, from the menu on the left, select the **Reports** option. See section Report Generation for more information.
- To search for interaction records, as well as to review and grade call recordings, chat transcripts and email replies, select the **Interaction Records** tab at the top of the screen. See section Interaction Records Search for more information.
- To search for agent activities and review corresponding screen recordings, from the menu on the left, select the **Agent Timeline** option. See section Agent Activity Search for more information.

Report Generation

When you select option **Reports** from the menu on the left, the application pane will display the list of available reports. By default, these are the predefined reports supplied with Bright Pattern Contact Center. If you have previously created some custom reports using Jaspersoft Studio and uploaded their definitions into the system, such custom reports will also appear in the list of reports. For more information about stock and custom report definitions, see section Report Templates of the *Contact Center Administrator Guide*.

Reports overview

The reports are grouped by the type of contact center resources that they describe. Within each group, the reports are listed in alphabetical order according to the names of the corresponding report definitions. A description is provided for each report. If a description does not fit on the screen, hover over it to see the full text of the description in a tooltip box.

Select the desired type of report from the list. In the view that appears, use the report generation filters to select the resource for which you want to generate the report and to specify the reporting interval. Depending on the report type, you can select multiple resources and apply additional filters.

Report generation filters

Agent Selection Options

For reports where the agent drop-down selector is present, please note the following:

- The selection of multiple agents is available for the following reports:
  - Agent Activity
  - Agent Activity (CSV)
  - Agent Email
  - Agent Login/Logout
  - Agent Performance
  - Internal Chats
  - Intra-Team by Service
  - Intra-Team Performance
- Agent names are listed alphabetically in the drop-down selector; depending on your center's configured display name format, this will be by first or last name.
  - Depending on your center's configured name display, you may search for a specific agent by typing out the first letters of their name.

An example of searching for agent names starting with the letter "L"

- Agents that have been inactive for more than 30 days will be excluded from the drop-down selector; agents that had activity within 30 days before the search period will have their names displayed as grey, italicized text.

Agent names displayed as grey, italicized text indicates activity recent to the search period but not within the period

- Additionally, you may select the **Show disabled/deleted agents** checkbox from the drop-down menu to automatically include disabled and/or deleted agents from the report; the inclusion works even if agents had activity within the report's timeframe.

How to Clone Reports

To create a copy of a report, click the **Clone** button.

Clone

The report you clone can be found in the list of available reports under *Clone of Report Name*; from here you may rename and customize the report.

Clone of ...

How to Delete Cloned Reports

To delete a cloned report from the list of all reports, click the **Delete** button. Note that it is possible to delete cloned reports only. The selected report will be deleted from the full list of reports available for your contact center.

Delete

How to Rename Reports

To rename a report, click the **Rename** buttton; a dialog window will pop where you will enter the report's new name. The selected report will display the new name and will be available from the full list of reports available for your contact center.

Rename

How to Run Reports

To generate the report, click the **Run Report** button at the bottom of the report details pane. Report generation may take a few moments.

Run Report

The report will appear in a separate browser tab/window and occupy the entire available browser window space. Thus, you can have multiple reports open in your browser at the same time. Generated reports will continue to be available for viewing even when you close the Contact Center Administrator application. Depending on the amount of data, the generated report may occupy more than one page.

The generated report opens in a new browser tab/window

How to View and Use the Generated Report

The generated report appears as a static table of data within your browser tab/window. Usable links for navigation and export are located at the top of the page. If you export the report to a format such as .XLS, you can filter, sort, and reformat the data just as you would for any other spreadsheet.

Navigation

To navigate through the contents of the report, use the page navigation arrows or enter the page number you wish to view.

Metrics

To learn more about the metrics provided by each report, see sections Detail Reports and Aggregate Reports.

Exporting Reports

To export the generated report, choose the format (PDF, XLS, CSV, or TXT), and click the corresponding link.

Running the Report Again

To run the same report for a different resource and/or different reporting interval, simply change the filter setting and click the **Run Report** button again.

Going Back to Reports

To return to the list of reports, go back to the Contact Center Administrator application, section Reports, in your other browser tab or window.

How to Customize Reports

To customize the presentation of the report, click the **Customize** button.

Click Customize

The report will be opened in a new browser tab or window in the *Report Customizer* application.

Using the Report Customizer application to customize columns and report contents

This web application allows you to do the following:

- Click and drag columns onto different places on the report
  Changing-Column-Placement-50.png
- Adjust the width of columns by clicking and dragging the column borders

Adjusting-Column-Width-50.png

- Remove columns by dragging them to the margin of the report

  Removing-Columns-Report-50.png

- Add columns by dragging them from the margin of the report to the main screen of the report

Adding-Column-Reports-50.png

- Rename columns by clicking into the column title

Renaming-Columns-50.png

- Search the report columns for specific keywords

Search-Available-Columns-50.png

- Save your customized report with a new name and description

Save-Customized-Report-50.png

Other Actions

- To view available charts for the report, select the **show charts** checkbox.
- To save your customized report, click **OK**.
- To cancel customization and exit the Report Customizer, click **Cancel**.

Scheduling Reports

You can also schedule automatic generation of reports and their delivery to specified destinations as email attachments or via FTP. For more information, see Scheduling 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. For example, a report scheduled to run every 15 minutes will include data for the previous 15 minutes.

Repeat until

If you selected how often the report run should be repeated, you should specify the time when the report should stop being sent. For example, if you schedule hourly reports repeating every 30 minutes with *Repeat until* set to "06:00 PM", the last report will be sent at 6 p.m. with data up until 5:30 p.m.

Report Parameters

The Report Parameters section includes the parameters relevant to the selected report name. Depending on the selected Recurrence, you will have the following options:

- For **Hourly** recurrence:
  - Repetition interval - Based on the combination of Repeat every and Repeat until settings
  - Today
  - This week
- For **Daily**, **Weekly**, and **Monthly** recurrence:
  - Today
  - Yesterday
  - This week
  - This week (since Monday)
  - Last week
  - Last week (Monday - Sunday)
  - Current month
  - Last month
  - Last N days - Allows you to specify the number of days

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 theReport Parameters section.
- $(services) - This variable displays the name of the service(s) defined in theReport Parameters section.
- $(scenarioName) - This variable displays the name of the scenario defined in theReport 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 theReport Parameters section.
- $(timezone) - This variable dislays the time zone as defined in theReport Schedule section.

Please note that the available variables depend on the type of report being scheduled.

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 password.

Test connection

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

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.

Notes:

- 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 are available in Interaction Records and Agent Timeline within 15 minutes.
- In a worst-case scenario, the recordings for an interaction may be unavailable during two aggregation intervals (i.e., 30 minutes). Therefore, we recommend reviewing an interaction 30 minutes after it is completed.

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

Search Criteria

Interaction records searches may be narrowed down with specific search criteria. If, for example, you wish to search for interaction records pertaining to one agent only, you may add the *agent* condition to your search, specifying the agent's name, in order to view interaction records search results for just that agent.

Click "add condition" to view available search criteria

The criteria for such searches are listed in a drop-down menu that appears when you click **add condition**.

Select the conditions of your search

Search Criteria Descriptions

The criteria for such searches are described in the order in which they appear in the drop-down menu on the *Interaction Records* > *Search* page. Note that the criteria shown in the drop-down menu will depend on the media type (i.e., voice, chat, email) that you select for your search. **Please note**: Some criteria are not available to users with BPO client privileges only; these criteria will be marked with an asterisk **(*)**.

KM template used *

KM template used (where "KM" refers to "Knowledge Management") returns records of interactions where any Knowledge Base article was used. Note that *KM template used* applies to text-based interactions only. This criterion is not available to users who only have BPO client privileges.

account number

account number returns call attempts made with respect to the calling list record that contains the specified value in the field of the *account number* type.

agent *

agent returns records of interactions handled by the agent with the specified username. This criterion is not available to users who only have BPO client privileges.

case number *

case number returns records of email interactions associated with the specified case. This criteria is not available to users who only have BPO client privileges.

connected to *

connected to returns records of calls answered at the specified phone number. This criterion is not available to users who only have BPO client privileges.

direction

direction can be used to limit the search to incoming, outgoing, or internal interactions only. Note that not all directions apply to all media types.

disposition

disposition returns records of interactions that were processed with the specified disposition.

duration

duration returns records of interactions whose overall duration was greater than or less than the specified number of minutes.

ended after

ended after returns records of interactions whose processing ended after the specified date and time.

ended before

ended before returns records of interactions whose processing ended before the specified the date and time.

first name *

first name returns records of interactions handled by agents with the specified first name. This criterion is not available to users who only have BPO client privileges.

from

from returns records of interactions originated from the specified address.

- For inbound calls, *from* is the Caller ID.
- For outbound and internal calls, *from* is the extension from which the call was dialed.
- For chats, *from* is the IP address of the originating computer.

global interaction ID

global interaction ID returns interaction record(s) with the specified Global interaction identifier.

has call problem *

has call problem is used to search for calls that were marked by agents as calls with quality problems. You can select a particular type of problem or set it to *any* to get all records with quality problems of any kind. This criterion is not available to users who only have BPO client privileges.

has recording

has recording returns records of calls that have voice recordings available for playback in the system. This search condition does not return records of calls whose recordings were deleted due to the data storage limits imposed by your service provider.

has screen recording *

has screen recording returns records of calls that have screen recordings available for playback in the system. This search condition does not return records of calls whose recordings were deleted due to the data storage limits imposed by your service provider. This criterion is not available to users who only have BPO client privileges.

has voice signature

has voice signature returns records of calls during which a voice signature was collected from the customer. This search condition returns records of calls whose recordings were deleted due to the data storage limits imposed by your service provider. Assuming that you had those recordings exported and stored externally, you can use details of such records (e.g., *GIID*) to look for those recordings in your external storage.

in email subject *

in email subject returns records of all email interactions containing the specified text in their subject. This criterion is not available to users who only have BPO client privileges.

last name *

last name returns records of interactions handled by agents with the specified last name. This criterion is not available to users who only have BPO client privileges.

my_custom_field *

my_custom_field allows you to specify the value of a field to filter interactions.This criterion is not available to users who only have BPO client privileges.

no KM template used *

no KM template used (where "KM" refers to "Knowledge Management") returns records of interactions where no Knowledge Base articles were used. This search condition applies to text-based interactions only. This criterion is not available to users who only have BPO client privileges.

sentiment as float *

sentiment as float is the average values of sentiments for interactions. This can be calculated if a tenant has Natural Language Understanding (NLU) integration account configured and set for services. If administrators use this criterion, they can find interaction with negative or positive sentiments. For example, searching for a value of "< -0.5" will yield negative sentiment results or searching for a value of "> 0.75" will yield positive sentiment results. This criterion is not available to users who only have BPO client privileges.

service

service returns records of interactions associated with the specified service.

specific KM template used *

specific KM template used returns records of interactions where the specified Knowledge Base article was used. This search condition applies to text-based interactions only. This criterion is not available to users who only have BPO client privileges.

started after

started after returns records of interactions that were originated or received after the specified date and time.

started before

started before returns records of interactions that were originated or received before the specified the date and time.

text search *

text search can be selected as a search condition in order to enable interaction records (voice and chat only) to be fetched according to results of Full Text Search for a Patterns report. A text index is created for *chat_transcripts.messages.msg* if *chat_transcripts.messages.event* = *“party_message”*. This criteria is not available to users who only have BPO client privileges.

thread ID *

thread ID returns records of email interactions associated with the specified email thread. This criteria is not available to users who only have BPO client privileges.

to

to returns records of interactions sent to the specified original destination.

- For inbound calls, *to* returns the number originally dialed by the caller.
- For chats, *to* returns name of the messaging/chat scenario entry.

was flagged *

was flagged returns records of interactions that were flagged. This criteria is not available to users who only have BPO client privileges.

was transferred

was transferred returns records of interactions that were transferred.

Search Results

Your interaction records search will return a detailed list of data relating to the search criteria specified. This data may be used for a variety of purposes, such as for agent evaluation, training, viewing interaction metrics, understanding scenario actions taken, accessing recordings, and more.

The interaction records search returns detailed results

Column Descriptions

The search results are given in a table of data. Each column may be sorted by mousing over the column header name and clicking the "down" arrow. The data columns are described as follows, in the order shown in the results.

Interaction Icons

The far left column displays an icon that indicates the type of interaction:

- Call
- Chat
- Email

Date and Time

For inbound interactions, *Date and Time* displays the date and time when the interaction entered the system. For internal and outbound interactions, this column displays the date and time when the interaction was initiated. The time is given in Universal Coordinated Time (UTC).

From

- For chats and emails, *From* displays the IP address of the originating computer.
- For inbound calls, *From* displays the caller ID.
- For outbound and internal calls, *From* displays the extension from which the call was dialed.
- For chats, *From* displays the IP address of the originating computer.

To

The *To* column displays the original destination of the interaction.

- For inbound calls, *To* displays the number originally dialed by the caller.
- For chats, *To* displays the name of the Mobile/Web scenario entry.
- For emails, *To* displays the recipient email address.

Connected to

Connected to displays the name or email address (if known) of the party that received the call, chat, or email. If unknown, nothing is displayed.

Duration

For calls and chats, *Duration* displays the total duration of the interaction from the moment it entered the system or was initiated, until it was released.

Note that for reporting purposes, transferred interactions produce multiple records (called *segments*) where the first record shows *Duration* as an empty string and the last record shows the total interaction duration.

Flag

If the interaction was flagged by the agent who handled the interaction or by the supervisor who reviewed the interaction, a small flag icon is shown in this column.

Scenario

Scenario displays the name of the first scenario that was used to process this interaction. The scenario name is given as a link, which, when clicked, directs you to the *Scenario Steps* page that lists each action taken during the scenario.

The *Scenario Steps* provide the following information for the scenario at hand:

- **Execution Order** - The numbered order in which the scenario step occurred
- **Date & Time** - The date (month/day/year) and the time (in Universal Coordinated Time (UTC) in which the scenario step occurred
- **Duration** - The total length of the scenario step
- **Scenario Name** - The name of the scenario entry used
- **Block Type** - The shorthand name of the scenario block used (i.e., *IdentifyCustomer*, *RequestInput*, *SetProperty*, etc.)
- **Block Title** - The title of the block, if a variable or function is used to specify values in the scenario block
- **Block ID** - The numeric identifier of the scenario block
- **Block Exit taken** - The type of conditional exit taken for the scenario (note that this is one of the most useful scenario steps provided, as it shows why an interaction was ended)

Interaction Records > Scenario Steps

Service

Service is the name of the voice, chat, or email service associated with this interaction. Note that for reporting purposes, if the interaction was recategorized or transferred to a different service, each such event will produce a new record with a new service name.

Disposition

The *Disposition* column displays the disposition (if any) assigned to this interaction by the agent.

Notes

This column displays any free-text notes provided by the agent for this interaction. Notes convey additional information about an interaction that may not be obvious from the disposition.

Account number

Account numbers are customer identifiers that can sometimes be used as calling record keys. If an account number is associated with the interaction, that number will be displayed in this column.

Case ID

For email interactions, *Case ID* specifies the number of the case with which the email is associated. You can also view the case ID by double-clicking the global interaction ID (see below) and looking at the case history for the interaction.

Agent

Agent is the username of the agent who handled the interaction.

Recording

If a call recording or a chat transcript (for chats) is attached to the interaction, the recording will be displayed as a small icon . Click the icon link to either listen to or view the transcript of the recorded interaction.

Segments

Interactions with the same customer or user may have multiple segments (i.e., parts of the interaction). For example, an inbound call may be accepted by one agent and then transferred to another, giving the interaction two segments for the same interaction. The *Segments* column displays the total number of segments, even if there is only one.

Subject

For email interactions, *Subject* is the subject line of the email message.

Call Problem

Call Problem displays useful information regarding the quality of the call (i.e., static, dropped calls, silence, etc.).

Global Interaction ID

Global interaction ID (GIID) is a UUID-formatted number assigned to every interaction processed within Bright Pattern Contact Center.

Examples of global interaction IDs in search results

You can double-click the GIID to view the *Case History* of the interaction.

Case History includes the following data columns:

- **Interaction icons** - Icons that indicate the type of interaction (i.e., notes, customer email, agent reply, etc.)
- **Date and Time** - The date and time when the interaction entered the system or was initiated; time is given in Universal Coordinated Time (UTC).
- **From** - The name of the interaction recipient (if known)
- **To** - The name of the original destination of the interaction (if known)
- **Disposition** - The disposition (if any) assigned to this interaction by the agent
- **Text** - For chats and emails, the first line of text for the interaction

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 theInteraction 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	• *$(globalInteractionId)* - An optional file name component of exported voice recording files • *Global Interaction ID* - A field of the recordings details .CSV file
Activity History Forms	• *$(ActivityHistory.global_interaction_id)* - The Activity History list field data element is available in the Text form control.

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

General Information About Quality Management

In contact centers, quality management usually refers to the assessment of the quality of agent work via reviewing the available call and screen recordings, chat transcripts, and email messages. In Bright Pattern Contact Center, the results of such reviews can be expressed using a number of customizable grading categories, such as politeness and knowledge.

In this *Reporting Reference Guide*, Quality Management sections Call Recordings, Chat Transcripts, Email Messages, and Screen Recordings relate to the data provided in the Interaction Records Search Results.

How to Review Call Recordings, Chat Transcripts, and Email

To review call recordings, chat transcripts, or email messages, first select the desired interactions as described in section Interaction Records Search. The search conditions depend on your quality management practices. For example, if quality monitoring is based on random checks of agent recordings or transcripts, it is usually sufficient to define the agent's username and the desired time frame as your search conditions. If, on the other hand, you follow-up on a specific customer complaint, your search conditions may contain the customer's phone number, service name, and time frame.

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. If a particular interaction has been previously reviewed and rated, the user name will appear in the *Reviewed by* column.

The Search Results page displays all interaction information

Recording Availability

For phone calls, the availability of a recording for a particular call will be indicated by the audio icon in the *Recording* column. The percentage of recorded calls is specified in your contact center configuration and can be redefined for each service and each individual agent separately. If not all calls in your contact center are recorded, you can use filter *has recording* to limit your search results to call records that actually have recordings.

For chat interactions, the availability of a chat transcript is indicated by the messaging icon in the *Recording* column. Bright Pattern Contact Center unconditionally records transcripts for all chat service interactions and stores them for the same amount of time as the corresponding interaction records themselves. Therefore, you do not need to use any special filters to get access to chat interactions with transcripts.

Call Recordings

Interaction records that are associated with call recordings are displayed with an audio icon. By clicking the icon, you can listen to a call recording and review any agent-provided notes associated with the call. Call recordings are useful for supervisors, for example, who may wish to review agent calls, evaluate agent performance, and save agent ratings.

Listening to Call Recordings

To listen to a call recording, proceed through the following steps.

Step 1: Click and play the recording.

- The audio icon appears next to the corresponding interaction record. The *Review Call Recording* page will open with standard audio controls.
- Note that Depending on the type of media player used, the audio controls may appear only when you hover over the *Conversation recording* area. When using the *Review Call Recording* function for the first time in your browser, you may need to install the media player plug-in (extension). Also, depending on the internet security settings of your browser application, you may need to confirm your permission to use the media player on this page.
- If the agent entered a disposition or provided any free-form notes for this call, those items will be displayed on the *Review Call Recording* page as well.
- Click the play button to listen to the recording.

Step 2: Grade agent performance and comment.

If any categories for agent performance evaluation have been defined in your contact center configuration, you can grade the agent performance during the selected call on a scale of one to nine in any of those categories. You can also enter some free-form comments about this call recording.

Click the **Rate** button to save the data you have entered. Your grades and comments for this call recording will be stored and made available to other users who may subsequently review this call record.

Note that the same call recording is provided for all call segments, but you can grade performance of each agent who handled the call separately. Use the **next** and **previous** buttons to navigate between segments. Absence of any call grading categories on the *Review Call Recording* page for a particular call segment means that during that segment the call was connected to an IVR application.

Step 3: Save recordings and associated grades/notes.

- To download the grades, reviewer's notes, and the recording to your computer, click **Save As**.

- To share a link to the call recording with other reviewers, click **Copy link to share**. The link to this page will be copied to the clipboard. You can then paste this link to an email or text message to other people in your organization.

Note that in order to access the recording these people must have privilege *Listen to call recordings and chat transcripts*.

Chat Transcripts

Chat transcripts contain the full text and date/time data of a chat interaction from the moment that the chat entered the system. These transcripts are useful for agent evaluation purposes, understanding customer satisfaction, sharing details about a chat, recording chat details, and more.

Accessing Chat Transcripts

To view chat transcripts, you must search the interaction records available in *Reports* (make sure you are not still in *Configuration*).

1. Log in as Admin to the Contact Center Administrator application.
2. Navigate to *Reports* > *Interaction Records* > *Search*.
3. Select the check box for **Chat**, and specify the search criteria (e.g., date range) for the transcripts you wish to view.
4. Apply your changes.
5. Click the **Search** button.

Reviewing Chat Transcripts

To review a chat transcript, click the messaging icon for the corresponding interaction record. The *Review Chat Transcript* page will open with a complete chat transcript and grade controls.

If any categories for agent performance evaluation have been defined in your contact center configuration, you can grade the agent performance during the selected chat interaction on a scale of one to 10 in any of those categories. You can also enter some free-form comments about this transcript.

Click the **Rate** button to save the data you have entered. Your grades and comments for this chat interaction will be stored and available to other users who may subsequently review this call record.

Note that the same transcript is provided for all chat segments, but you can grade performance of each agent who handled the chat separately. Use the **next** and **previous** buttons to navigate between segments.

Exporting Chat Transcripts

To download the grades, reviewer’s notes, and the transcript to your computer, click the **Save as** icon .

To share a link to the chat transcript with other reviewers, click the **Copy link to share** icon . The link to this page will be copied to the clipboard. You can then paste this link to an email or text message to other people in your organization. Note that in order to access the transcript, these people must have the privilege *Listen to call recordings and chat transcripts*.

Emailing Chat Transcripts to Customers

A chat scenario can be configured to email a "human-readable" chat transcript to a customer. This capability extends the usefulness of chat transcripts beyond the reach of administrators working in the Contact Center Administrator, directly to the customer, by giving the customer the means to request an email copy of the transcript when the conversation is over. This functionality is set up and managed in the Scenario Builder application using the variables *$(item.transcript.text)* and *$(item.transcript.html)*.

How to Set up the Chat Scenario

In the following example, the chat scenario will include the following actions:

- The customer initiates a chat.
- The *Request input* form asks the customer to provide last name, first name, full name, email address, and the message to the company.
- The *Find Agent* block is deployed. If the agent accepts the chat, the *Connect Chat* block is enabled and the conversation begins.
- The conversation ends and the *Mobile Chat Survey* block is deployed. In this survey, the customer is asked to provide an email address if the customer wants a copy of the chat transcript to be emailed.
- The chat window closes.

To set up your chat scenario, follow these steps.

Step 1: Select the web chat scenario to edit.

- Navigate to *Configuration* > *Scenarios* > *Chat*.
- Select the web chat scenario you wish to edit. If you do not already have a web chat scenario set up, you should create one or use a template to create one. Note that a web chat scenario is not the same as a mobile chat scenario.
- Click **Edit** to edit the scenario in Scenario Builder.

Step 2: In Scenario Builder, create the scenario with the following blocks.

Scenario Builder will open in a separate tab or window, and your Web Chat Template scenario will appear. You should make your scenario match the scenario shown.

Setting up the web chat scenario

- Notice that the scenario begins with a Request Input block that asks the customer to fill out a form with first name, last name, and first name plus last name. These fields are included on the form using three Set Variable blocks.
- Drag each *Set Variable* block onto the scenario and place them all underneath the *Request Input* block.

Add Variable blocks to the Request Input block

- When the customer initiates a chat, the customer will see the form in the chat window.

- Set the variable properties, filling in the fields for *Variable name* and *Value*.
- The properties should be set as follows:

Variable name	Value	Description
item.lastName	$(item.externalChatData.last_name)	customer's last name
item.firstName	$(item.externalChatData.first_name)	customer's first name
item.fullName	$(item.externalChatData.first_name) $(item.externalChatData.last_name)	customer's full name

Step 3: Add more variables.

Drag two more *Set Variable* blocks onto the scenario underneath the last *Request input* block.

The properties should be set as follows:

Variable name	Value	Description
item.sendTranscript	1	The functionality to send the chat transcript is turned on.
item.email	$(item.externalChatData.email)	customer's email address

Note that *$(item.sendTranscript)* value must be set to 1 in the scenario for the chat transcript to be sent. If you set the value to zero or you leave it blank, the transcript will not be sent. Furthermore, the customer must provide an email address for the transcript to be sent.

The second set of Variable blocks

- Save your changes. Close the Scenario Builder application.

Step 4: Check and test your SMTP connection.

- Make sure your email settings are configured properly and that an SMTP server is specified.
- Navigate to *Call Center Configuration* > *Email Settings* > *SMTP Server.*
- Then enter the server properties in the fields shown.

Step 5: Define a standard message for the chat transcript template.

Make sure your *Chat Transcript Template* is defined. If you do not already have one, create one by navigating to *Call Center Configuration* > *Email Settings* > *Chat Transcript Template.*

A chat transcript template is the standard email that will be sent to the customer. The variables on the template are automatically populated with the customer's information (from the *Request Input* form in the scenario), your company's information (i.e., your name), and the contents of the chat transcript. You may edit the appearance of such a friendly message in any way you like. An example chat transcript template is shown.

Fill in the following fields:

- Sender display name (your name/your organization's name)
- Sender email address (your email address--whoever is sending the email)
- Subject (email subject line)
- Message (friendly message that includes the chat transcript)

If you set up your chat transcripts exactly like this, your customer will have the option to receive a copy of the chat transcript.

What the Customer Sees

At the end of the conversation, a feedback survey will be given to the customer to complete. This survey action item was placed in the chat scenario as a *Request Input* block. The customer will see the survey as shown.

Feedback survey

The customer completes the feedback survey and receives the chat transcript via email. An example of the email message is shown.

The chat transcript emailed to the customer

Email Messages

To review an email case, click the case number for the corresponding interaction record. The *Case History* page will open where all incoming , transferred , and outgoing emails related to this case will be listed in the chronological order. Any closing dispositions and notes that agents provided with respect to this case will also be listed with the notes icon . To preview content of each email, hover over the *Text* column.

Case history

Double-click the message that you wish to review. The *Review Email* page will open.

If any categories for agent performance evaluation have been defined in your contact center configuration, you can grade the quality of agent's message on a scale of one to ten in any of those categories. You can also enter some free-form comments about this email message.

Email review and grading

Click the **Rate** button to save the data you have entered. Your grades and comments for this email interaction will be stored and available to other users who may subsequently review this call record.

Note that you can grade performance of each agent who handled this case. Use the **next** and **previous** buttons to navigate between emails related to this case. Customer's email messages cannot be graded.

To download the grades and reviewer's notes, click **Save As**.

If you would like to review the details of the header of an incoming email, navigate to the desired incoming message and click the **download original** link.

To share a link to this email case with other reviewers, click **Copy link to share**. The link to this page will be copied to the clipboard. You can then paste this link to an email or text message to other people in your organization. Note that in order to access the case via the Contact Center Administrator application, these people must have privilege *Listen to call recordings and chat transcripts*.

Screen Recordings

Your system may be configured to capture videos of desktop screens of some agents during their working sessions. For viewing of any part of an agent session recording, use the Agent Timeline view.

If a screen recording is available for an agent session that you see in Agent Timeline view, you can click the screen recording icon corresponding to a particular agent state. A new window will open showing you a video of the agent's screen recorded during the selected state. To download the recording, click the download icon .

When an agent whose session is recorded handles an interaction, a screen recording related to handling of that interaction will also be available via the Interaction Records view.

Interaction records with screen recordings

To view an interaction screen recording, click the screen recording icon . The Review screen will open. Select the desired interaction segment and click the **Watch** button. To download the recording, click the **Download** button.

> **Note:** A new window opens each time you select a screen recording to play. Depending on the internet security settings of your browser application, you may need to explicitly allow pop-ups from the corresponding Contact Center Administrator application pages.

Agent Activity Search

When you select option *Agent Timeline* from the menu on the left, you will see a set of search filters where you select an agent and set a desired time frame. Click the **Search** button.

The search results pane displays all states within all working sessions of the selected agent that fit in the specified time frame. States are represented by the same icons that are used in the Agent Desktop application. For each state, information about its start time, end time, and duration is provided. For interaction-handling states (*Busy* and *After-Call Work*), the media type of the handled interaction is displayed.

For agent sessions where screen recording was used, a screen recording icon is displayed for all states within those sessions. See section Screen Recordings for more information.

Agent activity search

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.

Agent Activity Report

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

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** - Servisor-guide/AgentMetricsView|subteam]]

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
- *Recording failed:* Call terminated by system due to call recording failure.

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
- *Recording failed:* Call terminated by system due to call recording failure

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.

Call Detail Report

The *Call Detail* report provides detailed records of interactions in chronological order. A combination of filters *From Phone*, *Original Destination Phone*, and *Connected To Phone* allows you to request this report for interactions that originated from specific phone numbers, were made to specific service numbers, and were connected to specific phone numbers. The report does not include unanswered call attempts made by the Dialer for predictive/progressive campaigns; such attempts are reported via campaign results. For manual outbound calls, a Call Detail report is created for any call attempts that reached the carrier network (i.e., where the INVITE request was actually sent to a SIP trunk).

Note: This report provides records for voice and chat interactions only. Email interaction records appear in the Email Detail Report.

The Call Detail report provides detailed records of call interactions

Metric Descriptions

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

Agent disposition

The Disposition assigned to this interaction by the agent

Co-browse

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

Connected To

The name (if known) of the party that answered the call/chat

Connected To

For calls, the phone number of the destination where the call was answered

Date

- For inbound interactions, the date when the interaction entered the system
- For internal and outbound calls, the date when the call was initiated

Dialing/Ringing

- For inbound calls, the duration of the call ringing phase from the moment the call was distributed to an extension and until it was either answered or abandoned
- For internal and outbound calls, the duration of the call dialing phase from the moment the dialed number was received by the system and until the call was either answered or abandoned

Disposition

Disposition provides information about how the interaction ended. *Disposition* can be one of the following:

- *Caller Terminated*: Call/chat was terminated by the calling party (after the call was answered)
- *Callee Terminated*: Call/chat was terminated by the called party
- *Rejected/Busy*: Outbound call did not complete because the destination was busy or did not answer within a timeout
- *Network Busy*: Outbound call did not complete because of the network congestion
- *System Disconnected*: Call/chat was disconnected by the system
- *Abandoned in IVR*: Call was terminated by the caller while in the IVR application
- *Abandoned in queue*: Call/chat was terminated by the caller while waiting in queue; to distinguish normal abandoned calls from short-abandoned, use field *In SL* below
- *Abandoned ringing*: Call/chat was terminated by the caller after it was distributed to an agent and before it was answered (or before the No Answer timeout expired)
- *No Answer*: Call/chat was terminated while ringing after *No Answer time-out* expired (i.e., without being routed anywhere else)
- *Transferred by XXXX*: Interaction was transferred to another party by extension XXXX
- *Continued:* Participation of the "From" party on this call/chat, being part of a conference, ended, but the interaction between the remaining participants of the conference continued (such call will be shown as a subsequent record)
- *Self Service:* Processing of the call was finished by the IVR application and the requested service was provided (as indicated by execution of scenario block *Self-Service Provided*)
- *Recording failed:* Call terminated by system due to call recording failure

Duration

For calls and chats, the total duration of the interaction from the moment it entered the system or was initiated and until it was released.

Note that transferred interactions produce a separate record for each transfer segment, where each record shows duration of the corresponding segment.

From

The address from which the interaction originated

- For inbound calls, the Caller ID
- For outbound and internal calls, the extension from which the call was dialed
- For chats, the IP address of the originating computer

Global ID

The Global interaction identifier

Held

The number of times the call was placed on hold (for emails and chats, the number of times the chat interaction was out of focus)

Hold

The total time the call spent on hold. For chats, the total out-of-focus time (the time the interaction spent at the agents’ desktops, excluding the *Talk* time.)

In SL

In SL indicates whether this interaction was answered within the service level threshold configured for the associated service.

Possible values: *Yes*, *No*, and empty string.

Note that this field will also be set to *Yes* for short-abandoned calls. Such calls will have the *Disposition* field set to *Abandoned in queue*.

IVR

The amount of time that this call spent in IVR

Max Hold

The duration of the longest period the call was on hold

Media Type

The interaction media type, which can be either VOICE or CHAT

Notes

The free-text notes provided by the agent for this interaction

Original Destination

The original destination of the interaction

- For inbound calls, the number originally dialed by the caller
- For chats, the name of the Messaging scenario entry

Queue time

The amount of time that this interaction spent in the service queue

Scenario

The name of the first scenario that was used to process this interaction

Service/Campaign

The name of the service or campaign associated with this interaction

If the interaction was recategorized or transferred to a different service, each such event will produce a new record with a new service name.

Talk

The total call talk time, excluding hold time. For chats, the total in-focus time (the time the interaction was selected in the active communications lists of the agents who processed it.)

Time

- For inbound interactions, the time when the interaction entered the system

- For internal and outbound calls, the time when the call was initiated

Transferred From

In case this interaction originated by way of transfer, *Transferred from* refers to the extension from which this interaction was transferred.

Type

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

- *Inbound*
- *Inbound Chat*
- *Outbound*
- *Internal*
- *External* (a call where all parties are external)

Wrap-up time

The amount of time the agents spent doing after-call work related to this interaction

Call Detail (CSV) Report

The *Call Detail* report provides detailed records of interactions in chronological order. A combination of filters *From Phone*, *Original Destination Phone*, and *Connected To Phone* allows you to request this report for interactions that originated from specific phone numbers, were made to specific service numbers, and were connected to specific phone numbers.

Note: This report provides records for voice and chat interactions only. Email interaction records appear in the Email Detail Report.

This report is the same as the Call Detail 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.

All time is given in Universal Coordinated Time (UTC).

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.

id

This setting is reserved.

start_time

For inbound interactions, *start_time* specifies the date and time when the interaction entered the system.

For outbound and internal interactions, *start_time* specifies the date and time when the interaction was initiated.

media_type

media_type specifies the interaction media type with possible values of VOICE, CHAT, or EMAIL.

caller_phone_type

caller_phone_type specifies the location of the party that initiated the interaction. Possible values are INTERNAL or EXTERNAL.

callee_phone_type

callee_phone_type specifies the location of the party that received the interaction. Possible values are INTERNAL or EXTERNAL.

ivr_time

ivr_time is the amount of time that this call spent in IVR.

queue_time

queue_time is the amount of time that this interaction spent in the service queue.

pending_time

For inbound calls, *pending_time* specifies the duration of call ringing phase from the moment the call was distributed to an extension and until it was either answered or abandoned. For internal and outbound calls, *pending_time* specifies the duration of call dialing phase from the moment the dialed number was received by the system and until the call was either answered or abandoned. It does not apply to email.

talk_time

talk_time is the total call talk time, excluding hold time. For chats, *talk_time* is the total in-focus time (the time the interaction was selected in the active communications lists of the agents who processed it.)

hold_time

hold_time is the total time the call spent on hold. For chats, *hold_time* is the total out-of-focus time (the time the interaction spent at the agents' desktops, excluding the *talk_time* time.)

acw_time

acw_time is the amount of time the agents spent doing after-call work related to this interaction.

duration

For calls and chats, *duration* is the total duration of the interaction from the moment it entered the system or was initiated and until it was released.

Note that transferred interactions produce a separate record for each transfer segment, where each record shows duration of the corresponding segment.

from_phone

from_phone is the address from which the interaction was originated.

- For inbound calls, *from_phone* is the Caller ID.
- For outbound and internal calls, *from_phone* is the extension from which the call was dialed.
- For chats, *from_phone* is the IP address of the originating computer.

original_destination_phone

This is the original destination of the interaction.

- For inbound calls, *original_destination_phone* is the number originally dialed by the caller.
- For chats, *original_destination_phone* is the name of the Mobile/Web scenario entry.

connected_to_phone

connected_to_phone specifies the phone number of the party to which the call or chat was delivered. If the call/chat was transferred, it specifies the phone number of the party to which the call/chat was last transferred.

callee_login_id

For inbound and internal interactions, *callee_login_id* specifies the login ID of the user who received this interaction. If the interaction was transferred, it specifies the login ID of the user for which the interaction was last transferred.

service_name

service_name specifies the name of the service associated with the interaction. If the interaction was recategorized or transferred to a different service, each such event will produce a new record with the new service value.

scenario_name

scenario_name specifies the name of the scenario used to process this interaction. If the interaction was processed by multiple scenarios, the first applied scenario will appear in this field. (Other scenarios that may have been invoked from the main scenario do not affect this field.)

transferred_from_phone

For transferred calls and chats, *transferred_from_phone* is the phone number from which the call/chat was last transferred.

disposition

disposition provides information about how the interaction ended. *disposition* can be one of the following:

- *Caller Terminated*: Call/chat was terminated by the calling party (after the call was answered)
- *Callee Terminated*: Call/chat was terminated by the called party
- *Rejected/Busy*: Outbound call did not complete because the destination was busy or did not answer within a timeout
- *Network Busy*: Outbound call did not complete because of the network congestion
- *System Disconnected*: Call/chat was disconnected by the system
- *Abandoned in IVR*: Call was terminated by the caller while in the IVR application
- *Abandoned in queue*: Call/chat was terminated by the caller while waiting in queue; to distinguish normal abandoned calls from short-abandoned, use field *In SL* below

- *Abandoned ringing*: Call/chat was terminated by the caller after it was distributed to an agent and before it was answered (or before the No Answer timeout expired)
- *No Answer*: Call/chat was terminated while ringing after *No Answer time-out* expired (i.e., without being routed anywhere else)
- *Transferred by XXXX*: Interaction was transferred to another party by extension XXXX
- *Continued:* Participation of the "From" party on this call/chat, being part of a conference, ended, but the interaction between the remaining participants of the conference continued (such call will be shown as a subsequent record)
- *Self Service:* Processing of the call was finished by the IVR application and the requested service was provided (as indicated by execution of scenario block *Self-Service Provided*)
- *Recording failed:* Call was terminated when the scenario is terminated due to a recording failure.

agent_disposition_name

agent_disposition_name refers to the Disposition assigned to this interaction by the agent.

agent_disposition_notes

agent_disposition_notes are free-text notes provided by the agent for this interaction.

case_number

case_number specifies the number of the case with which this email is associated. Unlike *case_id*, case number is a simple number suitable for manual processing.

email_subject

email_subject is the content of the email subject field.

thread_id

thread_id is the identifier of the email thread that this email is part of. This identifier is added to the subject of the email when the email is replied to and is used for case search during possible follow-up emails (see *case_search_result*).

in_service_level

in_service_level indicates whether this interaction was answered within the service level threshold configured for the associated service.

Possible values: *Yes*, *No*, and empty string.

Note that this field will also be set to *Yes* for short-abandoned calls. Such calls will have the *Disposition* field set to *Abandoned in queue*.

callId

callId is the Global interaction identifier.

cobrowsing

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

Email Detail Report

The *Email Detail* report provides detailed records of emails in chronological order. A combination of filters such as *From*, *To*, and *Connected To* allow you to request this report for emails that originated from a specific email address, emails that were sent to a specific email address, and emails that were a handled by a specific agent.

The Email Detail report provides detailed email records

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

- For inbound emails, *Date* is the date when the interaction entered the system.
- For outbound emails, *Date* is the date when the outbound email was sent.

Time

- For inbound emails, *Time* is the time when the interaction entered the system.
- For outbound emails, *Time* is the time when the outbound email was sent.

Time is given in Universal Coordinated Time (UTC).

Type

Type refers to the email type, which can be one of the following:

- *Inbound*
- *Outbound*

From

From refers to the email address in the "From" field.

Original Destination

Original Destination is the email address used as the destination address by the original sender.

Connected to

For inbound emails, *Connected to* is the name of the party that received the email.

Service/Campaign

Service/Campaign is the name of the service associated with this email. If the interaction was recategorized or transferred to a different service, each such event will produce a new record with the new service name.

Transferred from

In case this email originated by way of transfer, *Transferred from* refers to the agent who transferred this email.

Agent disposition

Agent disposition is the disposition assigned to this interaction by the agent.

Action

Action provides information about how the interaction ended.

An action can be one of the following:

- *Replied:* Inbound email was replied to
- *Closed:* Inbound email was closed without reply
- *Service Changed:* Email was recategorized (service associated with the email was changed and the same agent continued processing it; subsequent email processing will be shown as a separate record)
- *Sent:* Outbound email was sent
- *Discarded:* Outbound email was discarded without being sent

Queue time

Queue time is the amount of time that an inbound email spent in the service queue.

In Focus

The total *in-focus* time is the time the interaction was selected in the active communications lists of the agents who processed it.

Out of Focus

Total *out-of-focus* time is the time the interaction spent at the agents' desktops, excluding the*In Focus* time.

Handle time

- For inbound emails, *Handle time* is the time between the moment the email entered the system and the moment when the first meaningful response was sent (or the email was closed or transferred externally).
- For outbound emails, *Handle time* is the time between the moment the email was initiated by the agent and the moment the email was sent.

Note that transferred and recategorized emails produce multiple records in this report, where the first record shows *Handle time* as an empty string and the last record shows the total interaction duration. Note also that duration always shows calendar time (total time between the specified moments) regardless of hours of operation of the associated service (e.g., if an email was received at 4 pm and replied the next day at 10 am, the duration will show 18 hours, even if the call center was closed during the night time).

Wrap-up time

Wrap-up time is the amount of time the agents spent doing after-call work related to this email.

Case ID

Case ID is the identifier of the case that is related to this interaction.

Thread ID

Thread ID is the identifier of the email thread.

Subject

Subject refers to the content of the email subject line.

In SL

In SL indicates whether this email was replied to within the service level threshold configured for the associated service.

Possible values: *Yes*, *No*, and empty string.

Empty string is used if no service level is configured for the given service and when the result of email processing was anything other than a reply. Note that service level calculation excludes the hours outside of the HOP configured for the associated email service.

Global ID

Global ID is the Global interaction identifier.

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.

General Information About Aggregate Reports

This section describes the reports that contain key performance indicators for the main contact center resources such as agents, agent teams, services, and scenarios. These are available as out-of-the-box reports with Bright Pattern Contact Center:

Unless noted otherwise with respect to a particular metric, all call-related metrics count inbound calls for the aggregation interval in which they entered the system. For example, if a call entered the system in interval A and was answered in interval B, the service metric *Answered* will count it for interval A and not for interval B. Likewise, all internal and outbound calls are counted for the aggregation interval in which they were initiated.

Note also that all call-related metrics are also supported for the chat media type. Thus, for services that use media type chat, the term *call* in the description of any metric shall be interpreted as a chat interaction in the same context.

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 Login/Logout Report

The *Agent Login/Logout* report provides information related to agent login and logout of the Agent Desktop application. This report includes metrics such as agent name, the time of login/logout, whether the agent logged out normally or by timeout, the time spent logged in, the amount of time spent working or "Not Ready", and so forth.

The Agent Login/Logout report shows login/logout times, duration, and more

Metric Descriptions

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

Agent

The first and last name of the agent.

Login

The start time of the session (e.g., "09:04" for "9:04 a.m.").

Logout

The end time of the session (e.g., "09:39" for "9:39 a.m.").

Logout Type

Type of logout:

- **normal** - Agent logged out normally
- **timeout** - Agent was logged out by timeout due to loss of the Internet connection
- **supervisor** - Logout was forced by a supervisor
- **system** - Logout was forced from the system side (e.g., agent's account was deleted from configuration or disabled)

Screen Recording

Indication of whether this session was recorded.

Login Time

Duration of the session in hours:minutes:seconds (e.g., "00:33:16"). The total Login Time (given in bold) includes the total time that the agent was logged in for all sessions on the given date.

Total Working Time

The total time that the agent had a status other than "Not Ready" during the session, in hours:minutes:seconds (e.g., "00:03:43"). The Total Working Time (given in bold) includes the total working time for the agent for all sessions on the given date.

Not Ready %

The percentage of total time when the agent was in the "Not Ready" state during the session (e.g., "2%"). The total percentage (given in bold) is the average amount of time spent in the "Not Ready" state across all of the agent's sessions on the given date.

IP Address

The IP address of the Agent Desktop connection at the time of agent authentication.

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.

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.

Agent Time Allocation Report

The *Agent Time Allocation* report shows how much time agents of selected teams spent in various activities relative to the total logon time within the reporting interval.

This report applies to agents handling interactions of all supported media types. Note, however, that this report does not take into account the Omni-Channel Routing capacity configuration for media-blended environments. All metrics in this report are based on the traditional agent state model, where the agent is deemed *Ready* as long as the agent does not handle any interactions at all, and becomes *100% Busy* as soon as the agent begins handling an interaction of any media type. For more information about the traditional agent state model, see section Understanding and Handling Your States of the Bright Pattern Contact Center *Agent Guide*.

The Agent Time Allocation report shows the time that agents spent doing activities relative to the total logon time

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.

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) and ready to handle calls.

Occupancy %

Occupancy % is the percentage of 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).

Busy (Inbound) %

Busy (Inbound) % is the percentage of time that 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 % is the percentage of time that the agent spent doing after call work relative to the total logon time.

Ready %

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

All NR %

All NR % is the percentage of time that the agent was *Not Ready* for any reason relative to the total logon time.

Lunch NR %

Lunch NR % is the percentage of time that the agent was *Not Ready* for reason "Lunch" relative to the total logon time.

No answer NR %

No answer NR % is the percentage of time that the agent was in the forced *Not Ready* state after failing to answer an alerting service call relative to the total logon time.

Campaign in Time Report

The *Campaign in Time* report provides a set of key performance indicators for a selected outbound campaign.

Outbound campaign metrics are shown in the Campaign in Time report

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.

Records Completed

Records Completed provides the number of campaign records completed within the reporting interval for which at least one number was dialed.

Records Excluded

Records Excluded provides the number of campaign records completed within the reporting interval for which no attempts were made because of Do Not Call (DNC) match or filter exclusion.

Dialed

Dialed provides the number of campaign calls that were attempted in the reporting interval.

Avg Calling Rate

Avg Calling Rate provides the number of campaign calls that were attempted in the reporting interval divided by the number of minutes in this interval.

Live Answered

Live Answered refers to the number of campaign calls that were answered by called parties.

ASR %

ASR % is the average success rate, which is shown as the percentage of answered calls relative to the total number of attempts.

Abandoned

Abandoned provides the number of campaign calls that were abandoned (i.e., terminated by the called party after answer while waiting to be connected to an agent).

Dropped

Dropped gives the number of answered campaign calls that were disconnected by the system.

Handled

Handled provides the number of campaign calls that were answered by agents

Avg Connection Time

Avg Connection Time is the average time in which the calls that were answered by the called parties were connected to agents.

Avg Handle Time

Avg Handle Time is the average time that answered calls to this service were handled by agents. This metric includes hold time and after-call-work time.

Avg Talk Time

This metric gives the average talk time for the calls to this service that were answered.

Avg Hold Time

Avg Hold Time is the average hold time for the calls to this service that were put on hold at any time during their handling.

Avg ACW Time

Avg ACW Time is the average after-call-work time for the calls to this service.

Occupancy %

Occupancy % refers to the percentage of time that agents spent handling calls of this campaign (including after call work) relative to the total working time (i.e., the time spent handling calls for all campaigns/services and time in the *Ready* state).

Max Agents

For each team associated with this campaign, *Max Agents* is the maximum number of agents logged on simultaneously within the given reporting subinterval.

Min Agents

For each team associated with this campaign, *Min Agents* is the minimum number of agents logged on simultaneously within the given reporting subinterval.

FTE

For each team associated with this campaign, *FTE* is the total login time of all agents during the reporting interval divided by the length of the interval.

Preview Records Viewed

Preview Records Viewed is the number of preview records that were reviewed by agents.

Avg Preview Time

Avg Preview Time is the average time the preview records were reviewed by agents.

Monthly Concurrent Users (License) Report

The *Monthly Concurrent Users* report offers a visual representation of the maximum number of users that were logged into the system via the Agent Desktop application on each day within the selected month. Days without any users logged on are skipped.

Note that your report will not look exactly like the example shown because the properties of your report are dependent on the Agent Desktop users for your tenant.

The Monthly Concurrent Users report shows the maximum number of users that were logged in each day

Dispositions in Time Report

The *Dispositions in Time* report provides a breakdown of calls associated with the selected service or campaign by the applied disposition. This report applies to services of all supported media types.

Note: If you run service reports for time periods when you had old or discontinued services, the names of these services will be displayed; this includes deleted services. The reports for these time periods will show that you had interactions as well as the service names you had at that time. Note that if you do not have any activity on these services within 30 days, the system will display the service names in italics; the system will not show the names at all after 90 days without activity.

The Dispositions in Time report shows the calls associated with the service or campaign per disposition

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.

Disposition name

Disposition name provides the number of interactions whose processing ended with the given disposition. (The report will provide a column for each disposition applied during the reporting interval.)

Disposition name %

Disposition name % is the percentage of interactions whose processing ended with the given disposition relative to *Total processed*. (The report will provide a column for each disposition applied during the reporting interval.)

Total processed

Total processed is the total number of interactions processed in the given reporting interval. For outbound and blended services, this metric includes all campaign call attempts.

Email Service Report

The *Email Service* report provides key performance indicators for services of email media types.

Note: If you run service reports for time periods when you had old or discontinued services, the names of these services will be displayed; this includes deleted services. The reports for these time periods will show that you had interactions as well as the service names you had at that time. Note that if you do not have any activity on these services within 30 days, the system will display the service names in italics; the system will not show the names at all after 90 days without activity.

Performance indicators for email services

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.

Received

Received provides the total number of inbound emails that requested this service in the given reporting interval (including both new emails and emails related to existing threads). Interactions received via transfer or service change are excluded.

Received New

Received New provides the number of new inbound emails that requested this service in the given reporting interval. This metric excludes emails related to existing email threads, as well as interactions received via transfer or service change.

Received by transfer

Received by transfer provides the number of inbound emails that requested this service via transfer. Interactions received via service change are excluded.

Received by service change

Received by service change provides the number of inbound emails that were received via recategorization by agents (i.e., the agent changed an originally assigned email service to this service and continued processing the interaction).

Carried Over

Carried Over provides the total number of emails that arrived at this service at any time before the given reporting interval and remained unprocessed at the beginning of the interval (including both new emails and emails related to existing threads).

Carried Over New

Carried Over New provides the number of new emails that arrived at this service at any time before the given reporting interval and remained unprocessed at the beginning of the interval (emails related to existing email threads are excluded).

Processed - Total

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

Processed - Replied

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

Processed – Closed

Processed – Closed provides the number of inbound emails that were closed without reply by agents within the given reporting interval.

Processed – Transferred

Processed – Transferred provides the number of inbound emails that were transferred to other services within the given reporting interval.

Processed – Service Changed

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

Remaining

Remaining provides the number of inbound emails that were not completed at the end of reporting interval.

Avg Reply Time

Avg Reply Time is the average reply time for inbound emails. The time is measured from the moment the email is placed in the service queue to the moment when the first meaningful reply is sent.

Replied in SL %

Replied in SL % refers to the percentage of emails for which the first meaningful reply was sent within the predefined service level threshold relative to all replied emails. Note that when compared with the service level threshold, the reply time excludes the time that is outside of the hours of operation specified for the given service.

Outbound Sent

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

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.

Requested Skills Report

This report shows demand for different skills defined in your contact center. The skills are arranged according to their groups, and the report shows requests for each individual skill and the totals for the group. Note that if a call requested several skills, it will be counted separately for each requested skill in all metrics of this report. Metrics in this report include campaign calls.

All metrics in this report are calculated for interactions of call and chat media types only.

Note: If you run service reports for time periods when you had old or discontinued services, the names of these services will be displayed; this includes deleted services. The reports for these time periods will show that you had interactions as well as the service names you had at that time. Note that if you do not have any activity on these services within 30 days, the system will display the service names in italics; the system will not show the names at all after 90 days without activity.

Metric Descriptions

Average Speed of Answer

Average Speed of Answer is the average time that answered calls requesting this skill spent waiting in the service queue and were ringing the desktop before being answered.

Number of Calls Received

Number of Calls Received is the total number of calls that requested this skill in the given reporting interval.

Number of Calls Queued

Number of Calls Queued is the number of calls requesting this skill that entered the queue.

Number of Calls Answered

Number of Calls Answered is the number of calls requesting this skill that were answered by agents.

Overflow Calls

Overflow Calls are the number of calls requesting this skill that were routed to overflow destinations.

Scenario Block Disconnects Report

This report shows the distribution of abandoned calls over the blocks of a selected scenario. Only the blocks where abandonment of calls occurred in the reporting interval are displayed.

Metric Descriptions

Block Type

Block Type is the scenario block type.

Block Title

Block Title is the scenario block title.

Number of Disconnects

Number of Disconnects is the number of calls abandoned while the given scenario block was being executed.

% of All Calls

% of All Calls is the percentage of calls abandoned while the given scenario block was being executed relative to all calls abandoned within this scenario.

Scenario Block Frequency Report

This report shows the frequency of execution of each block of a selected scenario relative to execution of other blocks of the same scenario. For each block, the distribution of execution results over possible exits is provided.

Metric Descriptions

Block Type

Block Type is the scenario block type.

Block Title

Block Title is the scenario block title.

Exit

Exit is the scenario block exit taken. Note that the exit "exception" normally means the termination of an interaction from the customer side.

Visits

For the block, *Visits* are the number of times that the given block was executed.

For an exit, *Visits* are the number of times that the given exit of the block was taken.

%

For the block, this is the percentage of times that the given block was executed relative to number of times all blocks of the given scenario were executed.

For an exit, this is the percentage of times that the given exit was taken relative to the number of times the block was executed.

Service in Time Report

This report provides main key performance indicators for selected inbound services with breakdown of the requested reporting interval into lower-level reporting intervals (e.g., weekly/monthly reports will show metrics for each day of the week/month, daily reports will show metrics for each hour of the day).

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

Note: If you run service reports for time periods when you had old or discontinued services, the names of these services will be displayed; this includes deleted services. The reports for these time periods will show that you had interactions as well as the service names you had at that time. Note that if you do not have any activity on these services within 30 days, the system will display the service names in italics; the system will not show the names at all after 90 days without activity.

Metric Descriptions

Number of Calls

This is the total *number of calls* that requested this service in the given reporting subinterval.

In Service Level %

In Service Level % is the percentage of calls to this service that were answered within thepredefined service level threshold relative to all answered or abandoned calls except the calls abandoned within that threshold.

Max Agents

Max Agents is the maximum number of agents possessing this service skill who were logged on simultaneously within the given reporting subinterval.

Min Agents

Min Agents is the minimum number of agents possessing this service skill who were logged on simultaneously within the given reporting subinterval.

Occupancy %

Occupancy % is the percentage of time that agents spent handling calls to this service, including after call work, relative to the total working time (i.e., the time spent handling calls to this service including after-call work and time in the *Ready* state).

Overflow Calls %

Overflow Calls % is the percentage of calls to this service that were routed tooverflow destinations.

Service in Time - Voice and Chat Report

This report provides main key performance indicators for selected inbound services with a breakdown of the requested reporting interval into lower-level reporting intervals (e.g., weekly/monthly reports will show metrics for each day of the week/month, daily reports will show metrics for each hour of the day).

This is an extended version of theService in Time report with some additional metrics related to the handling phase of the call/chat. For email service metrics, use the Email Service Report.

Note: If you run service reports for time periods when you had old or discontinued services, the names of these services will be displayed; this includes deleted services. The reports for these time periods will show that you had interactions as well as the service names you had at that time. Note that if you do not have any activity on these services within 30 days, the system will display the service names in italics; the system will not show the names at all after 90 days without activity.

Metric Descriptions

Number of Calls Received

This is the total number of calls or chats that were requested this service in the given reporting subinterval.

Received as Transfers

This specifies the number of service calls or chats received as transfers.

Self-Svc

This is the number of interactions serviced without involving a live agent (as indicated by execution of the Self-Service Provided scenario block).

Abn IVR

This is the number of interactions that were abandoned before entering the queue (i.e., while still at the IVR stage).

Abn IVR %

This is the percentage of interactions that were abandoned before entering the queue (i.e., while still at the IVR stage) out of the total number of interactions received.

Queued

This is the number of interactions that were queued. *Queued* means the scenario went through the Find Agent scenario block with appropriate service requested and regardless of service level.

Queued %

This is the percentage of interactions that were queued out of the total number of interactions received. *Queued* means the scenario went through the Find Agent scenario block with appropriate service requested and regardless of service level.

Abn Queue

This specifies the number of queued interactions that were abandoned at any time after the Service Level threshold. *Queued* means the scenario went through the Find Agent scenario block with appropriate service requested and regardless of service level.

Abn Rate %

This specifies the percentage of interactions abandoned in queue and interactions abandoned after being distributed to agents before being answered out of the total number of interactions received. Note that the percentage does not include interactions abandoned in IVR or interactions abandoned within the Service Level threshold.

Answered

This specifies the number of interactions that were answered (i.e., the agent answered while the Connect Call or Connect Chat blocks executed).

Answered %

This is the percentage of interactions that were answered out of the total number of interactions received.

Service Metrics Report

This report provides a full set of key performance indicators for selected inbound services.

The related metrics in this report are calculated for call and/or chat media types. For email service metrics, use the Email Service Report.

Note: If you run service reports for time periods when you had old or discontinued services, the names of these services will be displayed; this includes deleted services. The reports for these time periods will show that you had interactions as well as the service names you had at that time. Note that if you do not have any activity on these services within 30 days, the system will display the service names in italics; the system will not show the names at all after 90 days without activity.

Metric Descriptions

Number of Calls Received

Number of Calls Received is the total number of calls/chat interactions that requested this service in the given reporting interval.

If a call requests a service upon arrival and then is transferred to the same service internally, it will be counted twice in this metric. Likewise, if a chat interaction requests a service upon arrival and then is transferred to the same service internally, it will be counted twice in this metric. Please consider that due to different ways of treatment of calls there might be discrepancies in the service reports between the number of handled calls (i.e., answered, received etc.) and queued calls. A received call might be transferred or escalated and it will be counted as many times as it was transferred.

Received as Transfers

For voice calls only, *Received as Transfers* is the number of calls that requested this service via transfer operation.

Service Level

Service Level is the percentage of calls or chats to this service that were answered within thepredefined service level threshold relative to all answered or abandoned calls/chats except the calls/chats abandoned within that threshold.

Self Service

For voice calls only, *Self Service* is the number of calls serviced by an IVR application (as indicated by execution of scenario block Self-Service Provided).

%

For voice calls only, *%* is the percentage of calls serviced by an IVR application relative to total number of calls that requested this service.

Abandoned in IVR

Abandoned in IVR is the number of calls/chats to this service that were abandoned before entering the queue (e.g., while still in the IVR stage).

%

% is the percentage of calls/chats to this service that were abandoned in IVR relative to total number of calls that requested this service.

Queued

Queued is the number of calls/chats to this service that entered the queue, including calls/chats that selected the Virtual Queue option.

%

% is the percentage of calls/chats to this service that entered the queue relative to total number of calls/chats that requested this service.

Abandoned

Abandoned is the number of calls/chats to this service that abandoned after they were placed in the service queue. Note that if the Service Level is configured for this service, this metric will exclude the calls that abandoned within the service level threshold (i.e., short abandoned calls).

This metric includes:

- Calls that were abandoned while ringing
- Chats that were closed after the chat interaction was initiated
- Calls that selected the [Virtual Queue option](#) (i.e., a callback was requested), and
    - Did not answer when called back, or
    - Were busy when called back, or
    - Answered when called back but hung up before being connected to the agent

%

% is the percentage of calls/chats to this service that were abandoned outside of the service level threshold relative to the total number of calls/chats that requested this service except the calls/chats abandoned within the service level threshold.

Abandonment Time, Average

Abandonment Time, Average is the average time that the abandoned calls/chats to this service spent waiting in the service queue. For voice calls, *Abandonment Time, Average* could be the average time that the call was ringing before being abandoned (excluding calls abandoned within the service level threshold).

Overflow

Overflow is the number of calls/chats to this service that were routed to [overflow destinations](#).

%

% is the percentage of calls/chats to this service that were routed to overflow destinations relative to the total number of calls/chats that requested this service.

Answered

Answered is the number of calls/chats to this service that were accepted by agents, including calls that selected the Virtual Queue option, answered when called back, and were connected to agents.

%

% is the percentage of calls/chats to this service that were answered by agents relative to total number of calls/chats that requested this service.

Average Speed of Answer

Average Speed of Answer is the average time that answered calls/chats spent waiting in the service queue and ringing the desktop before being accepted.

Average Handling Time (Inbound)

Average Handling Time (Inbound) is the average time that answered calls/chats to this service were handled by agents, including hold time and after-call-work time.

Average Talk Time (Inbound)

Average Talk Time (Inbound) is the average talk/chat time for the calls/chats to this service that were accepted.

Average Hold Time (Inbound)

For voice calls, *Average Hold Time (Inbound)* is the average hold time for the calls to this service that were put on hold at any time during their handling. For chats, *Average Hold Time (Inbound)* is the average time in between chat replies.

Average Wrap-up Time (Inbound)

Average Wrap-up Time (Inbound) is the average after-call-work time for the calls/chats to this service.

Number of Calls Made

Number of Calls Made is the number of outbound calls/chats associated with this service, including unanswered calls/chats.

Average Handling Time (Outbound)

For voice calls only, *Average Handling Time (Outbound)* is the average time that answered outbound calls associated with this service were handled by agents. This metric includes hold time and after-call-work time, but it does not include dialing time.

Average Talk Time (Outbound)

For voice calls only, *Average Talk Time (Outbound)* is the average talk time for the outbound calls associated with this service.

Average Wrap-up Time (Outbound)

For voice calls only, *Average Wrap-up Time (Outbound)* is the average after-call-work time for outbound calls associated with this service.

Number of Surveys

These are the *number of surveys* available for calls (both inbound and outbound) and chats associated with this service.

First Call Resolution %

This is the percentage of surveys that indicated first-call or first-chat resolution relative to the number of surveys where the first-call or first-chat resolution received a response.

Contact Satisfaction

Contact Satisfaction is the average of contact satisfaction marks from all surveys where the contact satisfaction question received a response.

Net Promoter Score

The *Net Promoter Score* (NPS) is based on the results of surveys available for calls/chats associated with this service. For more information about NPS, see https://www.netpromoter.com/why-net-promoter/know/

Co-browse

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

Service Staffing and Overflow Report

This report shows the distribution of inbound calls to selected services over regular and overflow destinations. Each agent team whose agents participated in handling of the calls to a given service will be reported as a separate destination under this service. Each external number used as an overflow target for the calls to a given service will also be reported as a separate destination under this service.

All metrics in this report are calculated for call and chat media types.

Note: If you run service reports for time periods when you had old or discontinued services, the names of these services will be displayed; this includes deleted services. The reports for these time periods will show that you had interactions as well as the service names you had at that time. Note that if you do not have any activity on these services within 30 days, the system will display the service names in italics; the system will not show the names at all after 90 days without activity.

Metric Descriptions

Number of Calls Answered

For the service, *Number of Calls Answered* is the total number of calls to this service that were answered.

For a destination, *Number of Calls Answered* is the number of calls to this service answered at the given destination.

Average Handling Time (Inbound)

This is the average time that answered calls to this service were handled regardless of the destination.

For a destination, *Average Handling Time (Inbound)* is the average time that answered calls to this service routed to the given destination were handled at that destination.

% Abandoned

For a destination, *% Abandoned* is the percentage of calls to this service routed to the given destination that were abandoned while ringing relative to total number of calls that requested this service and routed to that destination. Only the calls abandoned outside of service level threshold are counted.

For the service, *% Abandoned* is the percentage of calls to this service routed to all destinations that were abandoned while ringing relative to total number of calls that requested this service and routed to any destination. Only the calls abandoned outside of service level threshold are counted.

Team Email Report

The *Team Email* report provides key performance indicators for teams handling interactions of the email media type. It has the same set of metrics as the Agent Email Report, combined for all agents of selected teams who handled email interactions.

This report gives performance indicators for teams handling email services

Team Operation Quality Report

This report provides metrics from surveys and quality monitoring activities for selected teams.

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

Metric Descriptions

Calls Graded

Calls Graded is the number of calls handled by all agents of this team that were graded. For more information about call grading, see section General Information About Quality Management.

Number of Surveys

This is the *number of surveys* available for calls handled by all agents of this team.

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 all agents of this team.

Contact Satisfaction

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

Net Promoter Score

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

Team Performance Report

This report provides general performance metrics for selected teams.

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

Metric Descriptions

Occupancy %

Occupancy % is the percentage to time that all agents of this team 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 Handled

Number of Calls Handled is the total number of inbound calls handled by all agents of this team.

Average Handling Time (Inbound)

Average Handling Time (Inbound) is the average handling time, including after call work, for inbound calls handled by all agents of this team.

Number of Calls Made

Number of Calls Made is the total number of outbound calls handled by all agents of this team.

Average Handling Time (Outbound)

Average Handling Time (Outbound) is the average handling time, including after call work, for outbound calls handled by all agents of this team.

Number of Surveys

These are the *mumber of surveys* available for calls handled by all agents of this team.

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 all agents of this team.

Contact Satisfaction

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

Net Promoter Score

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

Co-browse

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

Telemarketing Compliance Report

Applicable to predictive and progressive campaigns, the *Telemarketing Compliance* focuses on calls that were answered by called parties and not connected to the agent within the unattended call timeout.

Note: The FCC refers to these calls as "abandoned calls" and limits the number of such calls within the campaign relative to the total calls answered. The related metric is called *Abandonment Rate*. In Bright Pattern terminology, such calls are referred to as *unattended* and the related ratio is called *Unattended %*. This is done in order to avoid confusion with the traditional use of *abandoned* in the contact center industry, where it is normally reserved for calls terminated by customers before being connected to an agent.

The Telemarketing Compliance report shows calls that were answered but timed out in predictive and progressive campaigns

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.

Calls Answered

Calls Answered provides the number of campaign calls that were answered by called parties.

Calls Unattended

Calls Unattended provides the number of campaign calls that were answered by called parties and subsequently either diverted to an IVR at any time, or dropped at any time, or connected to an agent with time exceeding the unattended call timeout.

Unattended %

Unattended % is the percentage of *Calls Unattended* relative to *Calls Answered*.

Virtual Queue (Callback) Report

This report provides a set of metrics for virtual queues associated with selected services. Unless noted otherwise with respect to a particular metric, any *callback* mentioned in this table shall be interpreted as a callback attempt made with respect to the given service. Note that callback attempts are counted for the aggregation intervals in which the corresponding inbound calls entered the system.

Note: If you run service reports for time periods when you had old or discontinued services, the names of these services will be displayed; this includes deleted services. The reports for these time periods will show that you had interactions as well as the service names you had at that time. Note that if you do not have any activity on these services within 30 days, the system will display the service names in italics; the system will not show the names at all after 90 days without activity.

Metric Name	Description
Callbacks Requested	Number of calls queued for this service that requested callbacks (i.e., selected theVirtual Queue option).
%	Percentage of calls queued for this service that requested callbacks relative to all incoming calls except the ones abandoned in IVR or short abandoned.
Callbacks Busy	Number of callbacks that failed because the called party was busy.
%	Percentage of callbacks that failed because the called party was busy relative to all callbacks that have been attempted.
Callbacks No Answer	Number of callbacks that failed because the called party did not answer.
%	Percentage of callbacks that failed because the called party did not answer relative to all callbacks that have been attempted.
Callbacks Answered	Number of callbacks that were answered by the called party.
%	Percentage of callbacks that were answered by the called party relative to all callbacks that have been attempted.
Avg Wait Time to Callback	Average callback wait time (i.e., time between the callback requests and the related initial callback attempts).
Avg Callback Dialing Time	Average callback answer time (i.e., time between the moments when callback attempts were initiated and the customers answered them).
Avg Agent Answer Time	Average callback connection time (i.e., time between the moments when customers answered callback attempts and were connected to the agents).
Callbacks Abandoned	Number of callbacks that were answered by customers and then abandoned by them while waiting for an agent (in queue or ringing).
%	Percentage of callbacks abandoned relative to all callbacks that have been attempted.

Current Usage Reports

Your service provider may make carrier usage reports available to you. These reports provide information about the usage of carriers' resources by your contact center. If these reports are available, you can download them via the *Reports* > *Telco Usage* menu of the Contact Center Administrator application. You will be able to download and review carrier usage data for completed reporting/billing intervals (*Statements*) as well as for the current reporting interval before it is complete (*Current Usage*).

Note: Depending on the Service Provider practices, at the end of the reporting period usage data collected by the Bright Pattern Contact Center system may be verified against the data received from the carrier and reconciled if necessary. Thus, the *Current Usage* data is not reconciled and is subject to change upon verification against the data received from the carrier at the end of the reporting interval. On the other hand, *Statements* typically contain reconciled data.

Reports > Telco Usage > Current Usage

Summary and Detail Reports

Reports are available in two formats: summary and detail.

The summary report aggregates usage by billable access numbers assigned to your contact center. For each number, the following information is shown:

- Carrier's name
- Total number of inbound calls received via this number
- Total number of minutes in the above inbound calls
- Total number of outbound calls where this number was used as the caller ID
- Total number of minutes in the above outbound calls
- Total number of inbound SMS messages received via this number
- Total number of outbound SMS messages where this number was used as the caller ID

The detailed report shows details of every inbound and outbound call made by your contact center, as well as details of all received and sent SMS messages. For each interaction, the following information is shown:

- Carrier's name
- Start *date* and *time*
- Caller ID (field *from number*)
- DNIS (field *to number*)
- Duration (for SMS messages this field will be left blank)
- Direction - *inbound* or *outbound* (for SMS, it will show *inbound SMS* or *outbound SMS*)
- Access number billed by the carrier for this interaction

Note: Call duration is reported in minutes rounded to one decimal place. Rounding is performed using formula *(# of seconds + 5) / 6* and discarding the fraction. For example, the actual duration of 4 seconds will be reported as 0.1 minutes in usage reports. The actual duration of 7 seconds will be reported as 0.2 minutes.

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

Detailed Format

This section describes the fields of the campaign results exported or downloaded from the system in the detailed format. This format shows results of all call attempts made for a calling record (i.e., it contains one row per call attempt). Note that all attempts to process a record will be listed, including the ones where no actual dialing was initiated (e.g., if the record matched a Do-Not-Call condition or a campaign quota had been reached).

Campaign results are shown in either simple or detailed formats

Detailed Format Field Descriptions

Activity form fields

Activity form fields provides values of the fields of the activity form associated with this campaign. Only the fields that are marked for *export in results* will appear in the results.

Agent

The *Agent* field displays the username of the agent who last talked to the customer during the call resulting from this call attempt.

ANI

Automatic Number Identification (ANI) is the phone number of the calling party (also known as the caller ID), as defined during campaign configuration.

Note that the ANI field does not appear in preview campaign results. The ANI field may appear empty in results if you were running a preview campaign, or if there is a problem with the campaign configuration.

Answered Duration

Answered Duration provides the duration of the call resulting from this call attempt from the moment live voice was detected until it was released. This duration does not include after-call work. For unsuccessful call attempts, this field is set to “0”.

Answered Duration is available for predictive/progressive campaigns only. Set to "0" for campaigns of the preview type.

Call Disposition

Call Disposition provides the disposition set for this call attempt. For descriptions of preconfigured dispositions, see section Predefined Dispositions of the *Contact Center Administrator Guide*.

Call Disposition Code

Call Disposition Code provides the alphanumeric code of the *Call Disposition* (if defined in configuration).

Calling record fields

Calling record fields provides all fields of the calling record for which this call attempt was made. The fields have the same names and values, and they are arranged in the same order in which they appear in the calling list.

Call Note

This field provides the call notes entered by the agent for this call attempt.

For unsuccessful call attempts, this field can be used by the system to report details of the failed called attempt (CPA results and SIP signaling codes). For interpretation of the CPA results, see *CPA_result* below.

Call Time

Call Time provides the date and time when this call attempt started.

Completed

The *Completed* field is set to “1” if the record was completed during this call attempt (a final disposition set); otherwise, it is set to "0". For records whose processing was stopped at this attempt because a corresponding campaign quota had been reached (see *Out of Quota* below), this field is set to “0”.

Connected

Field *Connected* is set to “1” if the call was established from the PSTN point of view. For all other instances, this field is set to “0”. Note that established calls may incur connection and duration charges.

CPA Duration

CPA Duration provides the duration of the CPA (call progress analysis) phase of this call attempt from the moment network signaling reported the call as answered and until the decision about the type of answer was made (i.e., live voice, fax/modem, answering machine).

CPA Duration is available for predictive/progressive campaigns only. Set to "0" for campaigns of the preview type.

CPA recording file

CPA recording file provides the name of the file where CPA recording for this call attempt is stored.

CPA result

CPA result displays the result of call progress analysis for this call attempt.

Possible values include the following:

Value	Description
0	Unknown (no result; e.g., when call ended before CPA was applied or finished)

1	Voice (live voice detected)
2	Answering Machine (answering machine greeting detected)
3	Announcement (speech detected that is not live voice or an answering machine greeting; e.g., an IVR prompt)
4	FAX (fax/modem response detected)
5	SIT (SIT tone detected)
6	Busy (busy tone detected; usually indicates that the called party is busy)
7	Fast Busy (fast busy signal detected; usually indicates that the call cannot be established due to network congestion; sometimes is also used to indicate invalid and/or disconnected numbers)
8	Ring Back *(ring back tone detected and continued beyond the* No Answer *timeout; see* Contact Center Administrator Guide*, section Outbound Campaign Settings for more information)*
9	Silence (no sound detected for longer than 5 seconds)

Note that CPA results may not have direct (one-to-one) correspondence to call dispositions. The latter are determined based on combination of CPA results, line signaling, and some other factors.

CPA RTP server id

CPA RTP server id displays the identifier of the host name of the RTP server where the *CPA recording file* is stored.

Dialing Duration

This field provides the duration of the dialing phase of this call attempt from the moment it was initiated and until network signaling reported it as either answered or failed (congestion, busy, invalid number, etc.) Dialing Duration is available only for progressive/predictive campaigns. Set to 0 for campaigns of preview type.

Dialing Duration is available for predictive/progressive campaigns only. Set to "0" for campaigns of the preview type.

Global Interaction ID

This field provides the Global interaction Identifier of this call attempt. An empty field indicates that the call was never actually dialed. For preview campaigns, note that if an agent makes several call attempts while handling one preview record, all such call attempts will have the same global ID.

Is Call Attempt

If *Is Call Attempt* is set to “1”, then a call was actually dialed.

Is Inbound Call

This field is set to "1" if the attempted call was an inbound call within a blended service (i.e., a customer returned a missed call using the campaign Caller ID). Note that *Is Inbound Call* is specified only if *Is Call Attempt* is set to "1".

List Name

List Name provides the name of the calling list that contains the record for which this call attempt was made as defined in configuration.

Out of Quota

The *Out of Quota* field is set to "1" if the record processing was stopped or never started because the campaign quota related to this record was reached or because the record did not match any quota groups defined within the campaign.

Quota Group

For any record where the *Out of Quota* field is set to "1", this field indicates which particular value group reached its quota before this record could be processed. If the record was not processed because it did not match any quota groups defined within the campaign, this field will be set to "<no match>".

Record Disposition

Record Disposition provides the disposition set for the record if the call was completed during this call attempt. For descriptions of preconfigured dispositions, see section Predefined Dispositions of the *Contact Center Administrator Guide*.

Record Disposition Code

Record Disposition Code provides the alphanumeric code of the *Record Disposition* (if defined in configuration).

Record ID

Record ID provides the unique identifier of the record for which this calling attempt was made. The record ID is generated during calling list import.

Recording file

Recording file provides the name of the file where the conversation recording for the call resulting from this call attempt is stored.

RTP server id

RTP server id displays the identifier of the host name of the RTP server where the *Recording file* is stored.

This Phone number

This field gives the phone number used for this call attempt.

Simple Format

This section describes the fields of the campaign results exported or downloaded from Bright Pattern Contact Center in the simple format. This simple format shows only the result of the last call attempt for a calling record (i.e., it contains one row per record).

Campaign results may be exported or downloaded from the Contact Center Administrator application. To access them, navigate to *Configuration* > *Services & Campaigns* > *Outbound Voice Service* > *Results tab* and select **simple (records only)**. Note that the *Results tab* is available for only outbound services or campaigns.

Campaign results can be provided in a simple or detailed format

Simple Format Field Descriptions

Activity form fields

The values of the fields of the activity form associated with this campaign. Only the fields that are marked for *export in results* will appear in the results.

Calling record fields

The values of all fields of the calling record. The fields have the same names and values, and they are arranged in the same order in which they appear in the calling list.

Completed

If the record is completed (i.e., a final disposition was set), this field is set to “1”. Otherwise, this field is set to "0". For records whose processing was stopped or never started because a campaign quota was reached (see *Out of Quota* below), this field is set to “0”.

Last Agent

The username of the agent who last talked to the customer on the last call made for this record.

Last ANI

The caller ID from which the last call attempt was made.

Last Call Disposition

The disposition set for the last call attempt made for this record. For descriptions of preconfigured dispositions, see section Predefined Dispositions of the *Contact Center Administrator Guide*.

Last Call Disposition Code

The alphanumeric code of the *Last Call Disposition* (if defined in configuration).

Last Call Duration

The duration of the last call made for this record in seconds from the moment an answer was detected. This field is set to “0” for unsuccessful call attempts.

Last Call Time

The date and time when the last call attempt for this record started.

Last Note

The last call notes entered by the agent for the last call made for this record.

Last Phone Called

The phone number dialed during the last call attempt for this record. This phone number is copied from the calling record.

Last Scheduled at

This field is non-blank if the last attempt for the given record is a rescheduled call attempt. It is set to the earliest time the rescheduled call was allowed by dial rules.

List Name

List Name provides the name of the calling list that contains this record as defined in configuration.

Out of Quota

This field is set to "1" if the record processing was stopped or never started because thecampaign quota related to this record was reached, or because the record did not match any quota groups defined within the campaign.

Quota Group

For any record where the *Out of Quota* field is set to "1", the *Quota Group* field indicates which particular value group reached its quota before this record could be processed. If the record was not processed because it did not match any quota groups defined within the campaign, the *Quota Group* field will be set to "<no match>".

Record Disposition

The disposition set for this record when it was completed. For descriptions of preconfigured dispositions, see section Pre-defined Dispositions of the *Contact Center Administrator Guide*.

Record Disposition Code

The alphanumeric code of the *Record Disposition* (if defined in configuration).

Total attempts (per rec)

The total number of call attempts made for this calling record.

Recordings Details Format

The following table describes the fields of the data file that accompanies the export of call recordings and maps them to the available components of configurable file names that are assigned to recordings during export. The file is exported in .CSV format and contains details of the corresponding calls, which may facilitate a search for specific recordings once they have been exported out of the system.

Note that conference calls produce multiple recordings corresponding to the number of participating agents. The recording details file in this case will contain a separate record for each recording.

Field Name	File Name Component	Description
Agent First Name	*$(agentFirstName)*	For complete recordings, the first name of the agent who last handled this call; for segments, the first name of the agent who handled the given segment
Agent Last Name	*$(agentLastName)*	For complete recordings, the last name of the agent who last handled this call; for segments, the last name of the agent who handled the given segment
Agent loginId	*$(agent)*	For complete recordings, the, username of the agent who last handled this call; for segments, the username of the agent who handled the given segment
Customer phone	*$(customerPhone)*	Customer’s phone number (technically, the phone number of the party opposite to the above agent)
Direction	*$(direction)*	Call direction, Inbound or Outbound
Disposition	*$(disposition)*	Call disposition
Export status	N/A	An indicator of whether the recording was actually exported (success) or the recording was never found (failed)
Flagged	*$(flagged)*	An indicator of whether the call was flagged
Global Interaction ID	*$(globalInteractionId)*	Global interaction identifier of this call; note that for complete recordings, there may be more than one call recording file with the same identifier. For segments, the Global Interaction ID of all segments will be inherited from the interaction that those segments are a part of.
N/A	*$(callDuration)*	Overall call duration of this call
N/A	*$(callHour)*	Ordinal number of the hour (from 00 to 23) during which the call started
N/A	*$(currentTime)*	The value is set to the time when the recording is exported.

N/A	*$(uniqueId)*	Unique identifier assigned to this recording; unlike *Global Interaction ID* (above), this value is unique for each exported recording
Notes	N/A	Call notes entered for by the agent
N/A	*$(periodEndDate)*	The value is the start time of the last exported recordings file (if there was at least one file to export), or the end of the period if there were no files to export. **Note**: Starting from Bright Pattern Contact Center version 5.3.5, this variable replaces the *$(currentDate)* variable.
Pure Talk Time	*$(pureTalkTime)*	Pure talk time of this call/segment (excludes ACW and hold times); it is empty for IVR segments
RecordingId	N/A	Name of the file that contains the recording of this call; for segments, the name of the file containing the given voice segment
Segment Time	*$(segmentDuration)*	Overall duration of the recorded segment
Service	*$(service)*	Name of the service or campaign associated with this call; for segments, the service that was associated with the interaction at the end of the given segment
Start Time	*$(callDate), $(callTime)*	Date and time of call start; for segments, the start time of the voice segment
Talk Time	N/A	Overall duration of this call
Type	*$(type),*	Type of recording; possible values are “Complete” or “Segment”
Voice Signature	*$(voiceSignature)*	An indicator of whether the recording contains a voice signature

Information About Real-Time Metrics

Real-time metrics pull data from various areas in Agent Desktop and are constantly updated in real-time (every few seconds) to reflect the current status of your contact center operations. Real-time metrics allow you to stay informed about your and your team's current performance. For a complete list, see List of All Real-Time Metrics.

An example of real-time agent and team metrics as seen via the Supervision section

Real-Time Metrics Categories

Real-time metrics are organized into the following categories. **Please note**: Some metrics fall into several categories.

Agent Metrics

Agent metrics are related to agent work and performance. Example metrics from this group include*Agent Login Time* and *Avg Reply Time*.

Campaign Metrics

Campaign metrics are related to the performance of a campaign. Example metrics from this group include *Attempted* and *Total Completed*.

List Metrics

List metrics are related to individual calling lists within campaigns and that can be displayed via Lists View. Example metrics from this group include *Dialable* and *Total Remaining*.

Service Metrics

Service metrics are for either all services assigned to a selected team or all services assigned to all teams. Example metrics from this group include *Busy* and *IN in Progress*.

Skill Metrics

Skill metrics are a subset of service metrics and are related to each individual skill within that service. Example metrics from this group include *IN Active* and *Ready*.

Team Metrics

Team metrics are related to the work and performance of a team. Example metrics from this group include *IN Avg Handle Time* and *Not Ready*.

Dashboard and Wallboard

Real-time metrics are also utilized in the Dashboard and Wallboard applications. For the Wallboard, metrics will appear as a shortened version of the full name; the Dashboard metrics appear as abbreviations of the metric name. For example, the metric *Inbound interactions handled by agents for the day* appears as *Inbound handled by agents* on the Wallboard but as *CH* on the Dashboard. The metrics on the Dashboard appear as abbreviations due to the small size of the Dashboard itself. Dashboard and Wallboard names are included in All Real-Time Metrics. For more information about these applications, see Dashboard and Wallboard.

Types of Real-Time Metrics

The system provides real-time metrics of two types: cumulative and instantaneous.

- Cumulative metrics

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

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.)

Understanding Metrics Terminology

The names of many metrics have prefixes such as *IN*, *OUT*, or *CB*. Here is what these prefixes mean:

- 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 a list of other terminology used in real-time metrics and their definitions, see Glossary.

List of All Real-Time Metrics

The following is a list of real-time metrics. The metrics are listed in alphabetical order by their full name; shortened names will be shown in parenthesis if available. Wallboard and Dashboard names will also be listed where applicable.

For a full list of the vocabulary used in metrics definitions, see Glossary. Additionally, for a list of all metrics by category, see Real-Time Metrics by Category. A grid view of these metrics can also be found in List of Statistics in the *Real-Time Statistic API* guide.

Agent Idle Time (Idle Time)

Metrics categories: Agent, Campaign

Agent Idle Time is the current idle time for agents, which is the number of seconds an agent has waited since the last interaction; it is calculated as the difference between the current time and time of last agent state change. Note that Idle Time includes Not Ready time.

Agent State

Metrics category: Agent

Agent State displays the current agent state in text form. For the Not Ready state, this metric includes the reason for not being ready, if available. Note that the same information is shown as an icon preceding agent's name. Agent states and icons are explained in detail in the Bright Pattern Contact Center *Agent Guide*, section Understanding and Handling Your States.

Agents Busy With Interactions of This Service (Busy Svc)

Wallboard name: *Agents busy with this service*
Metrics categories: Campaign, Service

Agents Busy With Interactions of This Service provides the number of agents who are currently handling interactions associated with the given service. This metric includes agents in the ACW state with respect to such interactions.

Agents in ACW State (ACW Count)

Metrics category: Campaign, Service, Team

Agents in ACW State is the number of agents currently handling After Call Work (ACW). When displayed as a total for several services, this metric shows the total number of distinct agents with the given service skill(s) in this state. Agents with skills corresponding to multiple services in the set are counted once.

Agents Ready (Ready)

Wallboard name: *Matching agents ready*
Metrics categories: Campaign, Skill, Service, Team

Agents Ready is the number of agents in Ready state. When displayed as a total for several services, this metric shows the total number of distinct agents with the given service skill(s) in this state. Agents with skills corresponding to multiple services in the set are counted once.

Average ACW Time (Avg ACW Time or AACW)

Dashboard name: *AACW*
Metrics category: Agent, Campaign, Service, Team

Average ACW Time is the average daily time agents spend handling [After Call Work (ACW)](). When displayed as a total for several services, this metric shows the average across all services in the set (i.e., it is calculated as the total sum of all durations across all services divided by the total sum of all interactions across all services).

Average Handle Time (IN Avg Handle Time)

Wallboard name: *Average handle time*
Metrics category: Agent, Campaign, Service, Team

Average Handle Time is the average time, including hold time and after-call-work time, that the agent has answered and handled calls to the service. When displayed as a total for several services, this metric shows the average across all services in the set (i.e., it is calculated as the total sum of all durations across all services divided by the total sum of all interactions across all services).

Average Idle Time (Avg Idle Time)

Wallboard name: *Average idle time of matching agents*
Metrics categories: Agent, Campaign, Service, Team

Average Idle Time is the average time that agents have waited between the handling of service interactions. When displayed as a total for several services, this metric shows the average across all services in the set (i.e., it is calculated as the total sum of all durations across all services divided by the total sum of all interactions across all services). Note that Avg Idle Time includes Not Ready time.

Average Preview Time (Avg Preview Time)

Wallboard name: *Average preview time of matching agents*
Metrics categories: Agent, Campaign, Service

Average Preview Time is the average time that agents reviewed records of previewed outbound campaigns, from the moment the preview record was accepted by agents and until it was either dialed or skipped. When displayed as a total for several services, this metric shows the average across all services in the set (i.e., it is calculated as the total sum of all durations across all services divided by the total sum of all interactions across all services).

Average Sentiment (Sentiment)

Metrics categories: Agent, Campaign

Average Sentiment is the average current sentiment of calls. When displayed as a total for several services, this metric shows the average across all services in the set (i.e., it is calculated as the total sum of all durations across all services divided by the total sum of all interactions across all services).

Average Speed of Answer/Reply (IN ASA)

Wallboard name: Average speed of answer/reply
Metrics categories: Service

Average Speed of Answer is the average time that the calls waited in the service queue before being answered. *Average Time to Reply* is the average time between email arrival and the sending of the first meaningful reply (acknowledgment is not considered a meaningful reply). This metric is a cumulative statistic calculated for all interactions since the reset time. When displayed as a total for several services, this metric shows the average across all services in the set (i.e., it is calculated as the total sum of all durations across all services divided by the total sum of all interactions across all services) and is common for both inbound calls and emails.

Note: If ACW is set for an email service, then this metric is changed only after an agent leaves the ACW state.

Average Success Rate - percentage of successful call attempts (ASR %)

Metrics category: Campaign

Average Success Rate is the percentage of successful call attempts out of the last several hundred call attempts made (250 attempts, by default). This metric is used to adjust the calling rate of a predictive campaign to achieve optimal occupancy of available agents without losing answered calls. Thus, the successful call attempt is defined as any call attempt that was answered and queued for delivery to an agent.

Busy Agents (Busy)

Wallboard name: Matching agents busy
Metrics categories: Campaign, Service, Team

Matching Agents Busy is the number of agents in a Busy state. When displayed as a total for several services, this metric shows the total number of distinct agents with the given service skill(s) in this state. Agents with skills corresponding to multiple services in the set are counted once.

Calendar Reminders (CAL Reminders)

Metrics categories: Agent, Team

Calendar Reminders is the number of entries in the calendar events queue with time in the future, allowing supervisors to see how many recalls are set up by team, per agent.

Calendar Reminders in the Past (CAL Overdue)

Metrics categories: Agent, Team

Calendar Reminders in the Past is the number of entries in the calendar events queue with time in the past, allowing supervisors to see how many recalls are overdue per team, per agent.

Call Handling Rate Per Hour (HR)

Dashboard name: HR
Metrics categories: Campaign, Team

Call Handling Rate Per Hour is the average of all calls made per agent per hour.

Callbacks Currently Waiting in Queue (CB Waiting)

Wallboard name: Callbacks in queue now
Metrics categories: Campaign, Service

Callbacks Currently Waiting in Queue is the current number of callback requests currently waiting in the virtual queue associated with the given service.

Callbacks Requested for the Day (CB Requested)

Wallboard name: Callbacks requested
Metrics categories: Campaign, Service

Callbacks requested is the number of inbound calls to the given service for the day that have chosen the callback option. Note that this metric counts calls; therefore, if one call has requested the callback option multiple times, it will be counted once by this metric.

Campaign Mode (Mode)

Metrics category: Campaign

Campaign Mode displays the current dialer mode for a campaign ("preview, progressive, predictive").

Completed Records in Active Lists (Lists Completed)

Wallboard name: Completed records in active lists
Metrics categories: Campaign, List, Service

Completed Records in Active Lists is the number of records in active lists that have been marked as completed.

Completed Records with Personal Agent Assignments (Lists P.A. Completed or P.A. Completed)

Wallboard name: Completed records with personal agent assignments
Metrics categories: Agent, Campaign, List, Service

Completed Records with Personal Agent Assignments returns the number of personally assigned records completed since the beginning of the campaign. This metric is meaningful for preview campaigns only.

Count of Selected Dispositions

Wallboard name: Count of selected dispositions
Metrics categories: Service

Count of Selected Dispositions displays the total number of dispositions that are available for a given call service and then selected per interaction per day.

Custom Survey Metric 1 (Survey 1)

Wallboard name: Custom Survey Metric 1
Metrics categories: Agent, Service, Team

Custom Survey Metric 1 is the average percentage of customer survey responses based on a given metric within the survey. This number is calculated by taking the sum of all values, then dividing them by the total number of interactions, where surveys exist (i.e., the Save Survey Results block was used).

Custom Survey Metric 2 (Survey 2)

Wallboard name: Custom Survey Metric 2
Metrics categories: Agent, Service, Team

Custom Survey Metric 2 is the average percentage of customer survey responses based on an additional metric within the survey. This number is calculated by taking the sum of all values, then dividing them by the total number of interactions, where surveys exist (i.e., the Save Survey Results block was used).

Customer Satisfaction (CSAT)

Wallboard name: Customer Satisfaction
Metrics categories: Agent, Service, Team

Customer Satisfaction is the average result of surveys where the customer satisfaction question has been answered.

Estimated Campaign Duration (Est Duration)

Wallboard name: Estimated campaign duration
Metrics categories: Campaign, Service

Estimated Campaign Duration is the estimated length of time a campaign will run today with enough records to keep all logged-in agents busy.

Estimated Wait Time (IN EWT)

Wallboard name: Estimated wait time
Metrics categories: Campaign, Service

Estimated Wait Time is the estimated time a client will wait before being serviced. This metric includes callback requests. When this metric is displayed as a total for several services, it shows the value for the service where the wait time is currently the longest.

First Call Resolution (FCR)

Wallboard name: First Call Resolution
Metrics categories: Agent, Service, Team

First Call Resolution is the percentage of calls resolved by agents during a customer's first call. This number is calculated by dividing the sum of interactions marked as First Call Resolution by of all interactions, where save survey exists (i.e., the Save Survey Results block was used).

Inbound Calls Abandoned for the Day (IN Total Abandoned)

Wallboard name: Inbound abandoned
Metrics categories: Campaign, Service

Inbound Calls Abandoned for the Day is the number of inbound interactions terminated by the originating party.

Inbound Calls Abandoned in IVR for the Day (IN IVR Abandoned)

Wallboard name: Inbound abandoned in IVR
Metrics categories: Campaign, Service

Inbound Calls Abandoned in IVR for the Day is the number of inbound interactions terminated while being serviced by an IVR application.

Inbound Calls Abandoned in Queue for the Day (IN Queue Abandoned)

Wallboard name: Inbound abandoned in queue
Metrics categories: Campaign, Service

Inbound Calls Abandoned in Queue for the Day is the number of inbound interactions terminated by the originating party while waiting in queue.

Inbound Calls Abandoned While Ringing for the Day (IN Ringing Abandoned)

Wallboard name: Inbound abandoned while ringing
Metrics categories: Campaign, Service

Inbound Calls Abandoned While Ringing for the Day is the number of inbound calls terminated by the originating party while the line is ringing.

Inbound Calls Currently in IVR (IN in IVR)

Wallboard name: Inbound in IVR now
Metrics categories: Campaign, Service

Inbound Calls Currently in IVR is the number of inbound calls currently being processed by anIVR application.

Inbound Calls Currently Ringing (IN Ringing)

Wallboard name: Inbound ringing on agents now
Metrics categories: Campaign, Service

Inbound Calls Currently Ringing is the number of inbound calls currently ringing for agents.

Inbound Calls Dropped by System in IVR for the Day (IN IVR Dropped)

Wallboard name: Inbound dropped by system in IVR
Metrics categories: Campaign, Service

Inbound Calls Dropped by System in IVR for the Day is the number of inbound calls that have been disconnected by the system while being processed by an IVR application.

Inbound Calls Dropped by System in Queue for the Day (IN Queue Dropped)

Wallboard name: Inbound dropped by system in queue
Metrics categories: Campaign, Service

Inbound Calls Dropped by System in Queue for the Day is the number of inbound calls that have been disconnected by the system while waiting in queue.

Inbound Calls Dropped by System While Ringing for the Day (IN Ringing Dropped)

Wallboard name: Inbound dropped by system while ringing
Metrics categories: Campaign, Service

Inbound Calls Dropped by System While Ringing for the Day is the number of inbound calls that have been disconnected by the system while ringing.

Inbound Calls Duration Average for the Day (IN Avg Talk Time)

Wallboard name: Inbound duration average
Metrics categories: Agent, Campaign, Service

Inbound Calls Duration Average for the Day is the average of talk time of IN Handled calls. When displayed as a total for several services, this metric shows the average across all services in the set (i.e., it is calculated as the total sum of all durations across all services divided by the total sum of all interactions across all services).

Inbound Calls Duration Total for the Day (IN Total Talk Time)

Wallboard name: Inbound duration total
Metrics categories: Agent, Campaign, Service

Inbound Calls Duration Total for the Day is the sum of talk time of IN Handled calls.

Inbound Calls First Time Queued for the Day (IN Queued Unique)

Wallboard name: Inbound queued unique
Metrics category: Campaign

Inbound Calls First Time Queued for the Day is the number of inbound calls that entered queued state for the first time. This includes both inbound calls and callbacks dialed and answered by the customer.

Inbound Calls in IVR, Queue or on Agents Now (IN Calls in Progress)

Wallboard name: Inbound in IVR, queue or on agents now
Metrics categories: Campaign, Service

Inbound in IVR, Queue or on Agents Now is the number of in-progress, inbound calls that are in either IVR, service queue, or being handled by agents.

Inbound Calls Queued for the Day (IN Queued)

Wallboard name: Inbound queued
Metrics categories: Campaign, Service

Inbound Calls Queued for the Day is the number of inbound calls that enter a queued state for the day. This includes both inbound calls and callbacks dialed and answered by the customer.

Inbound Calls Rejected or Unanswered by Agents for the Day (IN Rejected)

Wallboard name: Inbound rejected or missed by agents
Metrics categories: Agent, Campaign, Service

Inbound Calls Rejected or Unanswered by Agents for the Day is the number of times agent state was moved by the system to not the Not Ready state. This includes both inbound calls and callbacks dialed and answered by the customer.

Inbound Calls Released by Agents for the Day (IN Agent Disconnected)

Wallboard name: Inbound released by agents
Metrics categories: Agent, Campaign, Service

Inbound Calls Released by Agents for the Day is the number of inbound calls disconnected by agents while talking to callers for the day. This includes both inbound calls and callbacks dialed and answered by the customer.

Inbound Calls Released by Callers for the Day (IN Remote Disconnected)

Wallboard name: Inbound released by callers
Metrics categories: Campaign, Service

Inbound Calls Released by Callers for the Day is the number of inbound calls ended by callers.

Inbound Calls Routed to Agents for the Day (IN Routed)

Wallboard name: Inbound routed to agents
Metrics categories: Campaign, Service

Inbound Calls Routed to Agents for the Day is the number of inbound calls that were queued and then routed to agents for the day.

Inbound Calls Self Serviced for the Day (IN Self Serviced)

Wallboard name: Inbound self serviced
Metrics categories: Campaign, Service

Inbound Calls Self Serviced for the Day is the number of inbound calls disconnected by the caller inIVR state with self-service flag set. This includes both inbound calls and callbacks dialed and answered by the customer.

Inbound Calls Short Abandoned in Queue for the Day (IN Queue Sh-Abandoned)

Wallboard name: Inbound short-abandoned in queue
Metrics categories: Campaign, Service

Inbound Calls Short Abandoned in Queue for the Day is the number of inbound interactions that have been terminated by the originating party while waiting in the service queue before the configured Service Level threshold.

Inbound Emails Carried Over from Previous Day (IN Carried Over)

Wallboard name: Inbound emails carried over
Metrics categories: Agent, Campaign, Service

Inbound Emails Carried Over from Previous Day is the number of inbound emails that arrived at this service at any time before the reset time and remained unprocessed at the reset time. This metric includes both new emails and emails related to existing threads.

Inbound Emails Carried Over from Previous Day for New Cases (IN Carried Over New)

Wallboard name: Inbound emails carried over from previous day
Metrics categories: Agent, Campaign, Service

Inbound Emails Carried Over from Previous Day for New Cases is the number of inbound emails that arrived at this service the day before the reset time and remained unprocessed at the reset time. This metric includes both new emails and emails related to existing threads.

Inbound Emails Closed Without Reply for the Day (IN Closed)

Wallboard name: Inbound emails dispositioned without reply
Metrics categories: Agent, Campaign, Service

Inbound Emails Closed Without Reply for the Day is the number of inbound emails that have had been assigned a disposition but have not been replied to.

Inbound Emails Currently on Agents, Saved in Personal Queues (IN Desktop)

Wallboard name: Inbound emails in personal queues now
Metrics categories: Agent, Campaign, Service

Inbound Emails Currently on Agents, Saved in Personal Queues is the current number of inbound emails that have been pulled into an agent's personal queue. Note that this metric is not a number of cases, except in the specific situation when each case originates from an inbound email and contains only one inbound email. For more information about the difference between cases and emails, see the *Agent Guide*, section Cases, Email, and Threads.

Inbound Emails Currently on Agents, Saved in Personal Queues, Waiting in Excess of SLA Time (IN Breached SLA)

Metrics categories: Agent, Campaign, Service

Inbound Emails Currently on Agents, Saved in Personal Queues, Waiting in Excess of SLA Time is processed emails that remained in agent personal queues that were not replied within the service level agreement (SLA) time.

Inbound Emails Offered to Agent for the Day (IN Offered)

Metrics categories: Agent, Campaign

Inbound Emails Offered to Agent for the Day is the total number of emails that were pushed to the agent in the given reporting interval. This metric does not include pulled or manually assigned emails.

Inbound Emails Pulled by Agent for the Day (IN Pulled)

Wallboard name: Inbound emails pulled by agent
Metrics categories: Agent, Campaign

Inbound Emails Pulled by Agent for the Day is the total number of emails that were pulled by the agent from the service queues in the given reporting interval. Approval queues are excluded.

Inbound Emails Replied for the Day (IN Replied)

Wallboard name: Inbound emails replied
Metrics categories: Agent, Campaign, Service

Inbound Emails Replied for the Day is the number of inbound emails that agents have replied to.

Note: If ACW is set for an email service, then this metric is changed only after an agent leaves the ACW state.

Inbound Emails Unanswered for the Day (IN Ignored)

Wallboard name: Inbound emails not accepted
Metrics categories: Agent, Campaign, Service

Inbound emails not accepted is the number of emails that were pushed to the agent and not accepted (returned back to queue or transferring agent). It does not include emails that went into receiving agent personal queue

Inbound Interactions Being Put on Hold by Agent(s) for the Day (IN on Hold)

Wallboard name: Inbound held
Metrics categories: Agent, Campaign

Inbound Interactions Being Put on Hold by Agent(s) for the Day is the number of inbound service calls put on hold by a user during her login session. The counter is reset when the user logs out.

Inbound Interactions Currently in IVR, Queue or on Agents (IN in Progress)

Metrics categories: Campaign, Service

Inbound Interactions Currently in IVR, Queue or on Agents counts the number of interactions currently in IVR with a particular Service as well as the number of interactions ringing or connected to agents for the service. It does not count the interactions in wrap-up state.

Note: If ACW is set for an email service, then this metric is changed only after an agent leaves the ACW state.

Inbound Interactions Currently in Queue (IN Waiting)

Dashboard name: Q
Wallboard name: Inbound in queue now
Metrics categories: Campaign, Skill, Service

Inbound Interactions Currently in Queue is the number of inbound calls currently in queued state. This includes both inbound calls and callbacks dialed and answered by the customer.

Inbound Interactions Currently Handled by Agents (IN Active)

Wallboard name: Inbound handled by agents now
Metrics categories: Agent
Inbound Interactions Currently Handled by Agents provides the number of inbound interactions currently being actively handled by agents. This metric includes all inbound interactions in the agents' active communications list (ACL), except the ones in the ACW phase. Note that emails in agents' *My Queues* are not considered active and are not included in this count.

Note that in earlier versions of Bright Pattern Contact Center, the voice-only equivalent of this metric was called*IN Talking*.

Inbound Interactions Handled by Agents for the Day (IN Handled)

Dashboard name: CH
Wallboard name: Inbound handled by agents
Metrics categories: Agent, Campaign, Service

Inbound Interactions Handled by Agents for the Day is the number of inbound interactions that have been handled by agents since the beginning of the day interval; it includes successful virtual queue callbacks. This metric will count all instances of possible transfers and conferences as separate interactions. For emails, this metric includes IN Replied, IN Closed, IN Transferred, and IN Svc Changed.

Note: If ACW is set for an email service, then this metric is changed only after an agent leaves the ACW state.

Inbound Interactions Received for the Day (IN Received)

Wallboard name: Inbound received
Metrics categories: Campaign, Service

Inbound Interactions Received for the Day is the number of inbound interactions that have requested this service since reset time. For emails, this metric includes both new emails and emails related to existing threads. Interactions received via transfer or service change are not included.

Inbound Interactions Received for the Day for New Cases (IN Received New)

Wallboard name: Inbound emails that created new cases
Metrics categories: Campaign, Service

Inbound Interactions Received for the Day for New Cases is the number of inbound emails which create new cases for the day. This metric excludes emails related to existing email threads.

Inbound Interactions Transferred by Agents for the Day (IN Transferred)

Dashboard name: CT
Wallboard name: Inbound transferred away
Metrics categories: Agent, Campaign, Service

Inbound Interactions Transferred by Agents for the Day is the number of inbound interactions that have been transferred to an external service.

Inbound Service Level Target

Wallboard name: Inbound Service Level target
Metrics categories: Campaign, Service

Inbound Service Level Target the target percentage of inbound interactions being serviced; this number is configured by system administrators.

Inbound Service Level Threshold

Wallboard name: Inbound Service Level threshold
Metrics categories: Campaign, Service

Inbound Service Level Threshold is the amount of time allotted to inbound service interactions.

Inbound Transfers Received for the Day (IN Transfers)

Wallboard name: Inbound received as transfers
Metrics categories: Agent, Campaign, Service

Inbound Transfers Received for the Day is the number of inbound call transfers.

Logged-in Agents (Logged In)

Wallboard name: Matching agents logged-in
Metrics categories: Campaign, Skill, Service, Team

Logged-in Agents is the number of agents currently logged into Agent Desktop in anystate except Supervising. When displayed as a total for several services, this metric shows the total number of distinct agents with the given service skill(s) in this state. Agents with skills corresponding to multiple services in the set are counted once.

Max Inbound Wait Time (IN Max Wait)

Dashboard name: WT
Wallboard name: Inbound longest wait now
Metrics categories: Campaign, Skill, Service

Max Inbound Wait Time provides the current wait time of the inbound interaction that has been waiting in queue the longest and is still unanswered; this includes inbound calls, callbacks dialed and answered by customers, inbound chats, and inbound emails. Note that an interaction could wait in queue several times (i.e., it could be requeued for another service either automatically or manually). In this case, the metric shows the interaction for the service it is currently waiting for but calculates the total waiting time since the moment the interaction entered the first service queue. When this metric is displayed as a total for several services, it shows the value for the service where the wait time is currently the longest.

For inbound email interactions, note the following: This metric is the current wait time of the email that has been waiting in the queue the longest time (and is still waiting), compared to all other emails currently waiting in the same queue. This includes service closure hours and is available for both Push and Pull distribution modes. Note that for email services this metric is updated once per hour.

Most Frequent Dispositions (Top Dispositions)

Metrics category: Agent

Most Frequent Dispositions is the 10 most frequent disposition set by agent.

My ACW Time (ACW Time)

Metrics category: Agent

My ACW Time is the total number of seconds an agent was inACW state. This metric is counted per agent per day.

My Break Time (BT)

Wallboard name: Break time total
Metrics category: Agent

My Break Time is the total number of seconds an agent was in any of theSystem Not Ready reasons or Custom Not Ready reasons your contact center's administrator configured as counting toward break time. This metric is counted per agent, per day.

My Busy Time (Busy Time)

Metrics category: Agent

My Busy Time is the total number of seconds an agent was in theBusy state. This metric is counted per agent, per day.

My Ready Time (Ready Time)

Metrics category: Agent

My Ready Time is the total number of seconds an agent was in theReady state. This metric is counted per agent, per day.

My Success Rate (SR)

Dashboard name: SR
Wallboard name: Success rate
Metrics category: Agent, Campaign

My Success Rate is the percentage of calls handled per agent that received the Success disposition type divided by the total number of calls with this service. This metric is calculated for all services the agent handles.

My Team Success Rate (TR)

Dashboard name: TR
Wallboard name: Success rate
Metrics category: Campaign, Team

My Team Success Rate is the percentage of calls handled per team that received the Success disposition type divided by the total number of calls with this service. This metric is calculated with break-downs per service and per team.

Net Promoter Score (NPS)

Wallboard name: Net Promoter Score
Metrics categories: Agent, Service, Team

Net Promoter Score (NPS) is the percentage of points for all surveys where a response was given for the contact satisfaction question. The percentage is calculated out of the number of interactions, where surveys exist (i.e., the Save Survey Results block was used). The percentage is calculated by subtracting the percentage of promoters (values 9 and 10) by the percentage of detractors (values 0-6). For more information about NPS, see netpromoter.com/know.

Not Ready Agents (Not Ready)

Wallboard name: Matching agents not ready
Metrics categories: Campaign, Service, Team

Not Ready Agents is the number of agents in Not Ready state. When displayed as a total for several services, this metric shows the total number of distinct agents with the given service skill(s) in this state. Agents with skills corresponding to multiple services in the set are counted once.

Number of Inbound Emails Joined to Already Existing Case, Per Day (IN Joined)

Wallboard name: Inbound emails for existing queued cases
Metrics categories: Agent, Campaign, Service

Number of Inbound Emails Joined to Already Existing Case, Per Day is the total number of inbound emails for this service that have been joined to already existing cases.

Number of Interactions on Agent (Active)

Metric Categories: Agent, Campaign

Number of Interactions on Agent provides the number of interactions that are currently being actively handled by the agent (i.e., inbound and outbound). This metric includes all interactions in the agents' Active Communications List (ACL), including the ones in the ACW stage. Emails in agents' *My Queues* are not considered active and are not included in this count. If an agent has more than one active interaction, clicking on the value of this metric will "unfold" the agent's row into a list showing information about all interactions that are currently being handled by this agent. Note that in earlier versions of Bright Pattern Contact Center, the related metrics used to be called *# Calls* and *# Chats*, and email *My Queue* used to be called *Personal Queue*.

Number of Interactions Re-categorized from a Different Service by Agents (IN Svc Change Received)

Wallboard name: Number of interactions recategorized from a different service
Metrics categories: Campaign, Service

Number of Interactions Re-categorized from a Different Service by Agents counts the number of times agents have changed received interaction services from one service to another service.

Number of Interactions Recategorized to a Different Service by Agents (IN Svc Changed)

Wallboard name: Number of interactions recategorized to a different service
Metrics categories: Agent, Campaign, Service

Number of Interactions Recategorized to a Different Service by Agents counts the number of times agents have changed interaction services to one service from another service.

Number of New Emails Processed by Agents, Including Replied, Closed Without Reply, Transferred and Service Changes (IN Handled New)

Wallboard name: Inbound emails handled
Metrics categories: Agent, Campaign, Service

*Number of New Emails Processed by Agents, Including Replied, Closed Without Reply, Transferred and Service Changes*is the number of first actions (reply, closed without reply, transfers and service changes) on new cases/threads. This metric counts only on the first action of an agent per email thread.

Note: If ACW is set for an email service, then this metric is changed only after an agent leaves the ACW state.

Number of Records Excluded by DNC Lists from Active Lists (Lists DNC)

Wallboard name: Number of records excluded by DNC lists from active lists
Metrics categories: Campaign, List, Service

Number of Records Excluded by DNC Lists from Active Lists is the total number of records that are excluded from active lists because they also appear on Do Not Call (DNC) lists.

Number of Records in Quota Groups That Reached Quota Limits (Out of Quota)

Wallboard name: Records in quota groups that reached quota limits
Metrics category: Service

Number of Records in Quota Groups That Reached Quota Limits is the number of non-finalized records that belong to quota groups that have reached the quota limits. The purpose of this metric is to provide a view on the number of remaining dialable records from a campaign.

Number of Records With a Success Disposition (Successes)

Metrics categories: List, Service

Number of Records With a Success Disposition is the number of records received with any of the success dispositions.

Occupancy in Campaign/Service (Occupancy)

Wallboard name: Occupancy of matching agents
Metrics categories: Agent, Campaign, Service, Team

Occupancy in Campaign/Service is the percentage of time agents have spent handling interactions of the given service (including the preview time and after-call work) out of their total working time (i.e., the time the agents have spent handling interactions of any service and being Ready to handle interactions).

Outbound Answered Calls That Did Not Connect to Agent in Compliance Time, Per Day (OUT Unattended)

Wallboard name: Outbound calls answered, out of connection speed compliance
Metrics categories: Campaign, Service

Outbound calls answered, out of connection speed compliance is the number of outbound calls answered that do not meet a minimum connection speed.

Outbound Call Attempts Currently in Progress (OUT in Progress)

Wallboard name: Outbound call attempts in progress now
Metrics categories: Campaign, Service

Outbound Call Attempts Currently in Progress is the number of outbound calls in a dialing or call progress analysis (CPA) state.

Outbound Call Attempts for the Day (OUT Dialed)

Dashboard name: CM
Wallboard name: Outbound call attempts
Metrics categories: Campaign, Service

Outbound Call Attempts for the Day is the total number of outbound calls agents have placed for the day.

Outbound Calls Abandoned at any Stage for the Day (OUT Abandoned)

Wallboard name: Outbound calls abandoned
Metrics categories: Campaign, Service

Outbound Calls Abandoned at any Stage for the Day is the number of outbound calls that have been terminated by agents for the day.

Outbound Calls Abandoned in IVR for the Day (OUT IVR Abandoned)

Wallboard name: Outbound calls abandoned in IVR
Metrics categories: Campaign, Service

Outbound Calls Abandoned in IVR for the Day is the number of outbound calls terminated while being processed by an IVR application for the day.

Outbound Calls Abandoned in Queue for the Day (OUT Queue Abandoned)

Wallboard name: Outbound calls abandoned in queue
Metrics categories: Campaign, Service

Outbound Calls Abandoned in Queue for the Day the number of outbound calls that have been terminated while waiting in the service queue.

Outbound Calls Abandoned While Ringing for the Day (OUT Ringing Abandoned)

Wallboard name: Outbound calls abandoned while ringing
Metrics categories: Campaign, Service

Outbound Calls Abandoned While Ringing for the Day is the number of outbound calls disconnected by customers while ringing on agents for the day.

Outbound Calls Attempts Failed for the Day (OUT Failed)

Wallboard name: Outbound calls attempts failed
Metrics categories: Campaign, Service

Outbound Calls Attempts Failed for the Day is the number of outbound calls initiated by agents and not answered by customers for a particular service for the day.

Outbound Calls Currently in IVR (OUT in IVR)

Wallboard name: Outbound calls in IVR %
Metrics categories: Campaign, Service

Outbound Calls Currently in IVR is the percentage of all outbound calls being processed by anIVR application out of all current outbound calls. When displayed as a total for several services, this metric shows the percentage calculated across all services in the set.

Outbound Calls Currently in Queue (OUT Waiting)

Wallboard name: Outbound calls in queue now
Metrics categories: Campaign, Service

Outbound Calls Currently in Queue is the number of outbound calls currently in Queued state.

Outbound Calls Delivered to Agents and Currently Ringing (OUT Ringing)

Wallboard name: Outbound calls ringing on agents now
Metrics categories: Campaign, Service

Outbound Calls Delivered to Agents and Currently Ringing is the number of outbound calls currently in Delivery Pending state (ringing on the agent, waiting for agent answer).

Outbound Calls Dropped in IVR for the Day (OUT IVR Dropped)

Wallboard name: Outbound calls dropped in IVR
Metrics categories: Campaign, Service

Outbound Calls Dropped in IVR for the Day is the number of outbound calls that have been disconnected by the system while being processed by an IVR application.

Outbound Calls Dropped in Queue for the Day (OUT Queue Dropped)

Wallboard name: Outbound calls dropped in queue
Metrics categories: Campaign, Service

Outbound Calls Dropped in Queue for the Day is the number of outbound calls that have been disconnected by the system while waiting in queue.

Outbound Calls Dropped While Ringing for the Day (OUT Ringing Dropped)

Wallboard name: Outbound calls dropped while ringing
Metrics categories: Campaign, Service

Outbound Calls Dropped While Ringing for the Day is the number of outbound calls that have been disconnected by the system while the line is ringing for agents for the day.

Outbound Calls Duration Average for the Day (OUT Avg Talk Time)

Wallboard name: Outbound calls duration average
Metrics categories: Agent, Campaign, Service

Outbound Calls Duration Average for the Day is the average talk time for OUT Handled calls. When displayed as a total for several services, this metric shows the average across all services in the set (i.e., it is calculated as the total sum of all durations across all services divided by the total sum of all interactions across all services).

Outbound Calls Duration Total for the Day (OUT Total Talk Time)

Wallboard name: Outbound calls duration total
Metrics categories: Agent, Campaign, Service

Outbound Calls Duration Total for the Day is the sum of talk time of OUT Handled calls.

Outbound Calls Queued for the Day (OUT Queued)

Wallboard name: Outbound calls queued
Metrics categories: Campaign, Service

Outbound Calls Queued for the Day is the number of outbound calls waiting in the service queue.

Outbound Calls Rejected or Unanswered by Agents for the Day (OUT Rejected)

Wallboard Name: Outbound calls rejected or missed by agents
Metrics categories: Agent, Campaign, Service, Team

Outbound calls rejected or missed by agents is the number of outbound calls that have been either rejected or unanswered by agents.

Outbound Calls Released by Agent for the Day (OUT Agent Disconnected)

Wallboard name: Outbound calls released by agent
Metrics categories: Campaign, Service

Outbound Calls Released by Agent for the Day is the number of outbound calls ended by agents.

Outbound Calls Released by Remote Party for the Day (OUT Remote Disconnected)

Wallboard name: Outbound calls released by remote party
Metrics categories: Campaign, Service

Outbound Calls Released by Remote Party for the Day is the number of outbound calls ended by the customer.

Outbound Calls Routed to Agents for the Day (OUT Routed)

Dashboard name: CRA
Wallboard name: Outbound calls routed to agents
Metrics categories: Campaign, Service

Outbound Calls Routed to Agents for the Day is the number of outbound calls that were queued and then routed to agents for the day. If a call is routed to an agent more than once with the same service, it is counted multiple times.

Outbound Calls Self Serviced for the Day (OUT Self Serviced)

Wallboard name: Outbound calls self serviced
Metrics categories: Campaign, Service

Outbound Calls Self Serviced for the Day is the number of outbound calls that have been terminated with a Self-Service indicator while being processed by an IVR application.

Outbound Calls Transferred by Agents for the Day (OUT Xfers or OUT Transferred)

Wallboard name: Outbound calls transferred away
Metrics categories: Campaign, Service

Outbound Calls Transferred by Agents for the Day is the number of outbound calls where agents initiate transfers for the day (either to queue, another agent or external number).

Outbound Current Calling Rate (OUT Call Rate)

Dashboard name: CR
Wallboard name: Outbound calling rate now
Metrics categories: Campaign, Service

Outbound Current Calling Rate is the current number of outbound calls being attempted by agents per minute.

Outbound Emails Currently on Agents, Saved in Personal Queues (OUT Desktop)

Wallboard name: Outbound emails in personal queue
Metrics categories: Agent, Campaign

Outbound Emails Currently on Agents, Saved in Personal Queues is the number of saved drafts of outbound emails that remained in agent personal queues.

Outbound Interactions Currently Handled by Agents (OUT Active)

Wallboard name: Outbound interactions handled by agents now
Metrics categories: Campaign, Service

Outbound Interactions Currently Handled by Agents is the number of outbound interactions currently being handled and completed by agents.

Outbound Interactions Handled by Agents for the Day/ Number of Unsolicited Emails and Follow-up Responses (OUT Handled)

Dashboard name: OCH
Wallboard name: Outbound interactions handled by agents (email - send non-replies)
Metrics categories: Agent, Campaign, Service, Team

Outbound Interactions Handled by Agents for the Day/ Number of Unsolicited Emails and Follow-up Responses is the number of outbound interactions that have been handled by agents; it includes campaign calls. For emails, this includes both new outbound emails and possible follow-up email messages related to existing email threads but does not include emails that have been started and discarded without sending.

Outbound Successful Calls Attempts for the Day (OUT Answered)

Wallboard name: Outbound calls attempts successful
Metrics categories: Campaign, Service

Outbound Successful Calls Attempts for the Day is the number of successful outbound call attempted by agents.

Percentage of Calls That Did Not Connect to Agent in Compliance Time, Per Day (OUT Unattended %)

Wallboard name: Outbound calls answered, out of connection speed compliance %
Metrics categories: Campaign, Service

Percentage of Calls That Did Not Connect to Agent in Compliance Time, Per Day is the percentage of all outbound calls answered that do not meet a minimum connection speed. This number is calculated by dividing the total number of unattended calls per day by the total number of outbound calls queued per day. When displayed as a total for several services, this metric shows the percentage calculated across all services in the set.

Percentage of Inbound Calls Abandoned for the Day (IN Total Abandoned %)

Wallboard name: Inbound abandoned %
Metrics categories: Campaign, Service

Percentage of Inbound Calls Abandoned for the Day is the percentage of inbound interactions terminated by the originating party out of all calls received for the day. This number is calculated by dividing the total number of inbound abandoned calls per day by the total number of calls received per day. When displayed as a total for several services, this metric shows the percentage calculated across all services in the set.

Percentage of Inbound Calls Abandoned in Queue for the Day (IN Queue Abandoned %)

Wallboard name: Inbound abandoned in queue %
Metrics categories: Campaign, Service

Percentage of Inbound Calls Abandoned in Queue for the Day is the percentage of inbound interactions terminated by the originating party while waiting in queue out of all inbound calls received for the day. When displayed as a total for several services, this metric shows the percentage calculated across all services in the set.

Percentage of Inbound Calls Handled for the Day (IN Handled %)

Wallboard name: Inbound handled by agents %
Metrics categories: Campaign, Service

Percentage of Inbound Calls Handled for the Day is the percentage of all inbound interactions that have been handled and completed by agents out of all inbound calls received for the day. When displayed as a total for several services, this metric shows the percentage calculated across all services in the set.

Percentage of Inbound Calls Short Abandoned in Queue for the Day (IN Queue Sh-Abandoned %)

Wallboard name: Inbound short-abandoned in queue %
Metrics categories: Campaign, Service

Percentage of Inbound Calls Short Abandoned in Queue for the Day is the percentage of inbound interactions that have been terminated by the originating party while waiting in the service queue before the configured Service Level threshold. This number is calculated by dividing the total number of inbound calls short-abandoned in queue per day by the total number of inbound calls queued per day. When displayed as a total for several services, this metric shows the percentage calculated across all services in the set.

Percentage of Inbound Interactions Answered in Service Level Over 20 Most Recent Calls (IN Svc Level % or SLA)

Dashboard name: SLA
Wallboard name: Inbound interactions answered in Service Level % (moving window)
Metrics categories: Campaign, Service

Inbound interactions answered in Service Level % (moving window) is the percentage of interactions answered before the threshold time (20 seconds by default) relative to all answered and abandoned interactions (except short abandoned) calculated over most recent 20 calls. For email interactions, it is the percent of emails replied to within the pre-defined Service Level threshold, relative to all replied emails. When this metric is displayed as a total for several services, it shows the value for the service where the service level is currently the lowest.

Percentage of Inbound Interactions Answered in Service Level Over the Day (IN Svc Level Day %)

Wallboard name: Inbound interactions answered in Service Level %
Metrics categories: Campaign, Service

Percentage of Inbound Interactions Answered in Service Level Over the Day is the percentage of calls answered before the threshold time (20 seconds by default) relative to all answered and abandoned interactions (except short abandoned) calculated for the day. For email interactions, it is the percentage of emails replied to within the pre-defined Service Level threshold, relative to all replied emails. When this metric is displayed as a total for several services, it shows the value for the service where the service level is currently the lowest.

Percentage of Outbound Calls Abandoned at any Stage for the Day (OUT Abandoned %)

Wallboard name: Outbound calls abandoned %
Metrics categories: Campaign, Service

Percentage of Outbound Calls Abandoned at any Stage for the Day is the percentage of calls that were dropped by customers in IVR or in Queue (including short and long waits) before being answered by agents out of all calls entered in IVR for the day. When displayed as a total for several services, this metric shows the percentage calculated across all services in the set.

Percentage of Outbound Calls Abandoned in IVR for the Day (OUT IVR Abandoned %)

Wallboard name: Outbound calls abandoned in IVR %
Metrics categories: Campaign, Service

Percentage of Outbound Calls Abandoned in IVR for the Day is the percentage of calls that were dropped by customers in the IVR scenario out of all calls entered in IVR for the day. When displayed as a total for several services, this metric shows the percentage calculated across all services in the set.

Percentage of Outbound Calls Abandoned in Queue for the Day (OUT Queue Abandoned %)

Wallboard name: Outbound calls abandoned in queue %
Metrics categories: Campaign, Service

Percentage of Outbound Calls Abandoned in Queue for the Day is the percentage of calls that were dropped by customers while waiting in queue for an agent out of all calls entered in queue for the day. When displayed as a total for several services, this metric shows the percentage calculated across all services in the set.

Percentage of Outbound Successful Call Attempts for the Day (OUT Answered %)

Wallboard name: Outbound calls attempts successful %
Metrics categories: Campaign, Service

Percentage of Outbound Successful Call Attempts for the Day is the percentage of successful outbound calls attempted by agents out of all calls attempted for the day. When displayed as a total for several services, this metric shows the percentage calculated across all services in the set.

Percentage of Records Attempted for the Day (Attempted %)

Wallboard name: Records attempts %
Metrics categories: Campaign, List, Service

Percentage of Records Attempted for the Day is the percentage of records attempts during a campaign out of all records for the day. When displayed as a total for several services, this metric shows the percentage calculated across all services in the set.

Percentage of Records Completed for the Day (Completed %)

Wallboard name: Records completions %
Metrics categories: Campaign, List, Service

Percentage of Records Completed for the Day is the percentage of completed records from a campaign for the day out of the sum of completed and remaining records for the day. When displayed as a total for several services, this metric shows the percentage calculated across all services in the set.

Percentage of Records Completed in Active Lists (Active Lists Completed %)

Wallboard name: Records completed in active lists %
Metrics categories: Campaign, List, Service

Percentage of Records Completed in Active Lists is the percentage of records completed per campaign out of the sum of completed and remaining records for the currently enabled lists. When displayed as a total for several services, this metric shows the percentage calculated across all services in the set.

Percentage of Records Skipped for the Day (Skipped %)

Wallboard name: Records skips %
Metrics categories: Agent, Campaign, Service

Percentage of Records Skipped for the Day is the percentage of records skipped per agent, per day, out of the total number of records the agent previewed. When displayed as a total for several services, this metric shows the percentage calculated across all services in the set.

Quota of Successes for the Calling List Quota Group (Quota)

Metrics categories: List

Quota of Successes for the Calling List Quota Group is the number of records that must receive a success disposition in this quota group. For disposition-based groups, it counts only the specific disposition of the group. For source field-based groups, it counts any success disposition.

Records Attempted for the Day (Attempted)

Wallboard name: Records attempts
Metrics categories: Campaign, List, Service

Records Attempted for the Day is the number of records from a campaign where contact has been attempted, including the records that are currently being attempted.

Records Completed for the Day (Completed)

Wallboard name: Records completions
Metrics categories: Campaign, List, Service

Records Completed for the Day is the number of records from a campaign that have been completed (i.e., the records for which final dispositions have been set).

Records Dialable Right Now (Dialable)

Metrics categories: Campaign, List, Service

Records Dialable Right Now displays the number of records in the list/campaign of non-closed records that can be called right now (taking into account calling hours and reschedule limitations). Please note, if the number of dialable records is more than 1000, the statistic will show "1000+". If the number of records is less than 1000, the statistic will show the actual number.

Records Expired (Expired)

Metrics categories: Campaign, List, Service

Records Expired displays the number of records in the list that have expired since they have been exported. The expiration is defined in calling list configuration.

Records Previewed for the Day (Previewed)

Wallboard name: Records previews
Metrics categories: Agent, Campaign, Service

Records Previewed for the Day is the number of preview interactions from a campaign for the day that agents have accepted (including auto-accepted ones).

Records Skipped for the Day (Skipped)

Wallboard name: Records skips
Metrics categories: Agent, Campaign, Service

Records Skipped for the Day is the number of records agents have accepted from a campaign but then skipped (canceled) per day.

Records State Chart (State Chart)

Metrics categories: Campaign, List, Service

Records State Chart returns 4 arrays of numbers: completed, rescheduled, remaining, and auto-completed. All arrays are indexed by attempt number. The attempt number is a record attempt number (retries are not counted).

- The first array (completed) contains the percentage (0-100) of records completed at this attempt number by agents. The percentage is counted by dividing by the List Records metric.
- The second array (rescheduled) contains the percentage of records rescheduled from this attempt number to the next attempt number; the percentage is calculated out of all list records.
- The third array (remaining) contains the percentage of records remaining not attempted on this attempt out of all list records.
- The fourth array (auto-completed) contains the percentage (0-100) of records completed at this attempt number by dialer (either by hitting a DNC record or reaching max attempts). The percentage is counted by dividing by the List Records metric.

Remaining Records in Active Lists (Lists Remaining or RR)

Dashboard name: RR
Wallboard name: Remaining records in active lists
Metrics categories: Campaign, List, Service

Remaining Records in Active Lists is the approximate number of remaining records from a campaign (not including records from disabled lists).

Remaining Records With Personal Agent Assignments (Lists P.A. Remaining)

Wallboard name: Remaining records with personal agent assignments
Metrics categories: Agent, Campaign, List, Service

Remaining Records With Personal Agent Assignments is the approximate number of remaining records from a campaign that have assigned personal agents (not including records from disabled lists).

Selected Dispositions Percentage

Wallboard name: Selected dispositions percentage
Metrics categories: Service

Selected Dispositions Positions displays the total percentage of dispositions that have been selected from all inbound calls out of all dispositioned calls; the metric is displayed per service per day.

Time in Preview (Preview Duration)

Wallboard name: Preview duration now
Metrics categories: Agent, Campaign

Time in Preview is the number of seconds the agent is spending in theBusy state with preview interaction. The metric returns a value of 0 if the agent is not doing a preview interaction at the moment.

Total Number of Records in Active Lists (Lists Records)

Wallboard name: Count of records in all active lists
Metrics categories: Campaign, Lists, Service

Total Number of Records in Active Lists is the number of all records, completed and remaining, in all currently enabled lists.

Unique Inbound Calls Handled by Agents for the Day (IN Handled Unique)

Wallboard name: Inbound handled unique
Metrics categories: Agent, Campaign, Service

Unique Inbound Calls Handled by Agents for the Day is the number of inbound service calls handled by all agents since the beginning of the day interval. If the same customer call is handled by multiple agents (blind transfer or conference), this metric is increased only on the first answer by the first agent. This includes both inbound calls and callbacks dialed and answered by the customer.

Unique Inbound Interactions Being Put on Hold by Agent(s) for the Day (IN on Hold Unique)

Wallboard name: Inbound held, non-transferred
Metrics categories: Agent, Campaign

Unique Inbound Interactions Being Put on Hold by Agent(s) for the Day is the number of unique inbound service calls put on hold by a user during his login session. The counter is reset when the user logs out.