5.8 Continuous Agent Monitoring

Bright Pattern Documentation

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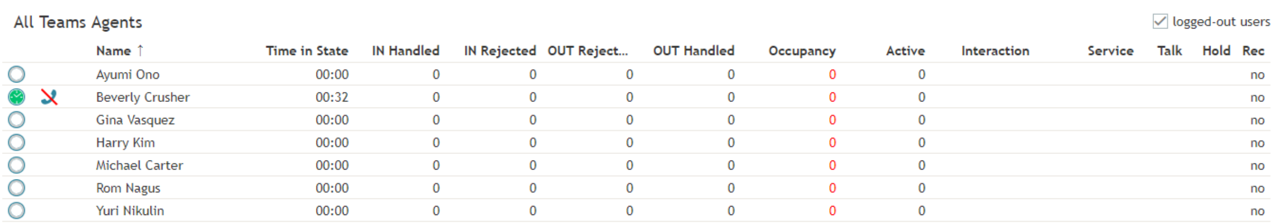
Agent Metrics View

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

All Teams Agents

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


All Teams Agents

logged-out users

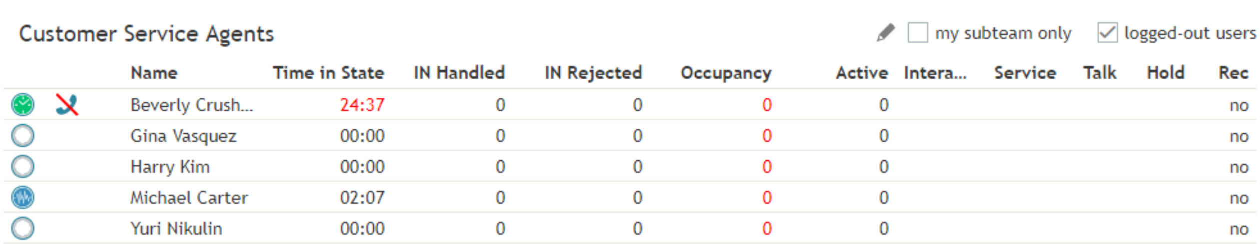
		Name ↑	Time in State	IN Handled	IN Rejected	OUT Reject...	OUT Handled	Occupancy	Active	Interaction	Service	Talk	Hold	Rec
		Ayumi Ono	00:00	0	0	0	0	0	0					no
		Beverly Crusher	00:32	0	0	0	0	0	0					no
		Gina Vasquez	00:00	0	0	0	0	0	0					no
		Harry Kim	00:00	0	0	0	0	0	0					no
		Michael Carter	00:00	0	0	0	0	0	0					no
		Rom Nagus	00:00	0	0	0	0	0	0					no
		Yuri Nikulin	00:00	0	0	0	0	0	0					no

All Teams agents view

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

Individual Teams Agents

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


Customer Service Agents

my subteam only

logged-out users

		Name	Time in State	IN Handled	IN Rejected	Occupancy	Active	Intera...	Service	Talk	Hold	Rec
		Beverly Crush...	24:37	0	0	0	0					no
		Gina Vasquez	00:00	0	0	0	0					no
		Harry Kim	00:00	0	0	0	0					no
		Michael Carter	02:07	0	0	0	0					no
		Yuri Nikulin	00:00	0	0	0	0					no

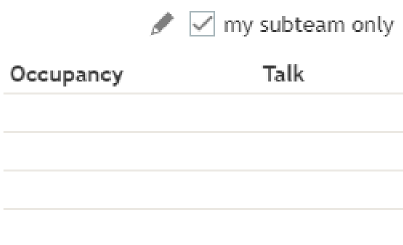
A view of agent metrics from the Customer Service team

Subteams

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

Viewing Subteams

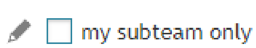
A supervisor may switch between full team view and subteam view by selecting the*my subteam only* checkbox.



Select the checkbox to view only agent metrics for the subteam

Subteam Editing Mode

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



Adding and Removing Agents

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

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

Editing a subteam

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

Default Agent Metrics

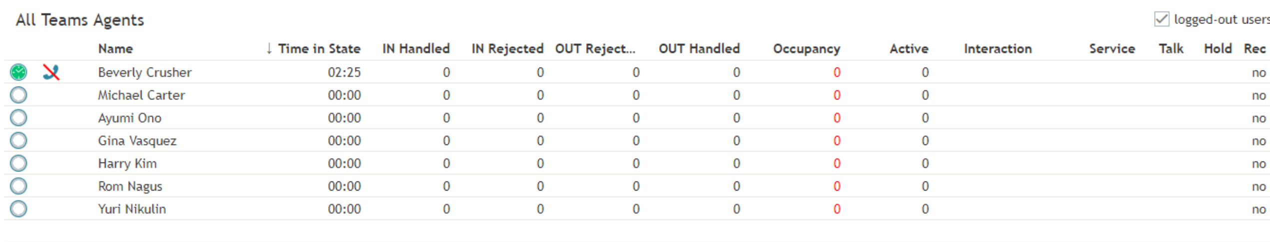
Upon selecting either All Teams or an individual team, the following metrics will be displayed for agents:

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

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

Sorting

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



All Teams Agents

logged-out users

		Name	↓ Time in State	IN Handled	IN Rejected	OUT Reject...	OUT Handled	Occupancy	Active	Interaction	Service	Talk	Hold	Rec
		Beverly Crusher	02:25	0	0	0	0	0	0					no
		Michael Carter	00:00	0	0	0	0	0	0					no
		Ayumi Ono	00:00	0	0	0	0	0	0					no
		Gina Vasquez	00:00	0	0	0	0	0	0					no
		Harry Kim	00:00	0	0	0	0	0	0					no
		Rom Nagus	00:00	0	0	0	0	0	0					no
		Yuri Nikulin	00:00	0	0	0	0	0	0					no

A view of metrics as sorted by Time in State

Icons

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

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

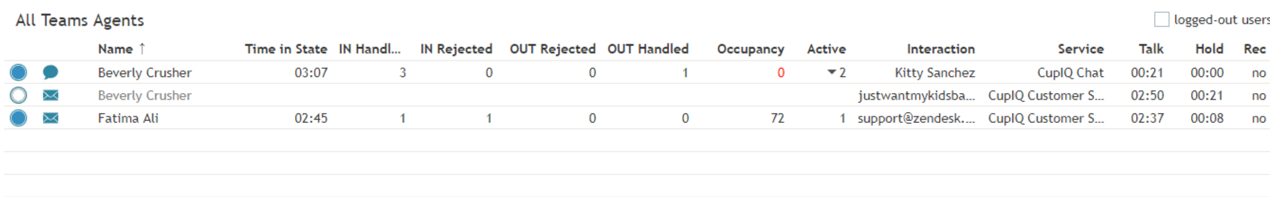
The interaction state icons have the following meanings:

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

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

Multiple Interactions

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


All Teams Agents

logged-out users

Name ↑	Time in State	IN Handl...	IN Rejected	OUT Rejected	OUT Handled	Occupancy	Active	Interaction	Service	Talk	Hold	Rec
Beverly Crusher	03:07	3	0	0	1	0	▾2	Kitty Sanchez	CupIQ Chat	00:21	00:00	no
Beverly Crusher								justwantmykidsba...	CupIQ Customer S...	02:50	00:21	no
Fatima Ali	02:45	1	1	0	0	72	1	support@zendesk....	CupIQ Customer S...	02:37	00:08	no

Agent metrics view showing multiple current interactions for one agent

For detailed descriptions of the available agent metrics, see section List of Agent Metrics.

Call Monitoring, Coaching, and Barge-In

As a supervisor, you can connect to a service call or chat handled by any member of your team. You can do this in order, for example, to monitor the quality of service or to help an agent with a difficult interaction. Note that the agent may send you a chat message (see section Individual Chat) or flag an interaction that the agent needs immediate help handling. When the interaction is flagged, you will see the flag icon next to the agent's state in the *Agent Metrics View*.

Flagged call in Agent Metrics View

Depending on the purpose, you can select one of the following three connection modes:

- **Monitor** - In this mode, you may observe the interaction. For calls, this means you can hear the conversation between the agent and the customer, but neither of them can hear you; for chats, this means you can observe the interaction as it is happening. Note that the agent will not have any indication that his interaction is being monitored. However, if you wish to make a suggestion for the agent, you can do this using chat.
- **Coach** - In this mode, you may provide feedback to agents while observing the interaction. For calls, this means you can hear the conversation between the agent and the customer, and you can talk to the agent. The agent will hear you, but the customer will not. For chats, this means you can see the chat as it is happening and chat with the agent without any indication to the customer.
- **Barge-in** - In this mode, both the customer and the agent will hear you speak or see you chat and will be able

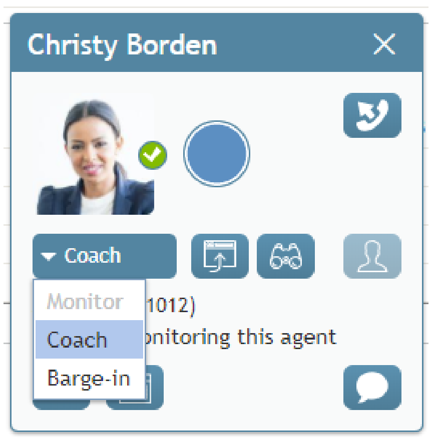
to interact with to you.

You can connect to a service call or chat using any of the above modes, and you can switch from one mode to another at any time and any number of times during the same interaction. For example, if an agent sends you a chat message requesting help with a difficult call, you can first listen to the call in *Monitor* mode and then, depending on your assessment of the situation, either switch to *Coach* mode to provide instructions to the agent or activate *Barge-in* mode to participate actively in the conversation with the customer.

How to Turn On/Off Supervision Modes

To activate one of the supervision modes:

- Select an agent from the *Agent Metrics View* in the right pane of Agent Desktop. The agent must be handling an active interaction and be in the Busy state.
- The *Contact Info Panel* will display the monitoring functions.
    - If the *Monitor/Coach/Barge-in* button displays the desired supervision mode, click the button.
    - If you wish to be connected in a different supervision mode, click the arrow section of the *Monitor/Coach/Barge-in* button, and select the desired supervision mode from the drop-down menu.



Call Monitoring and Pull Screen controls

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

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

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

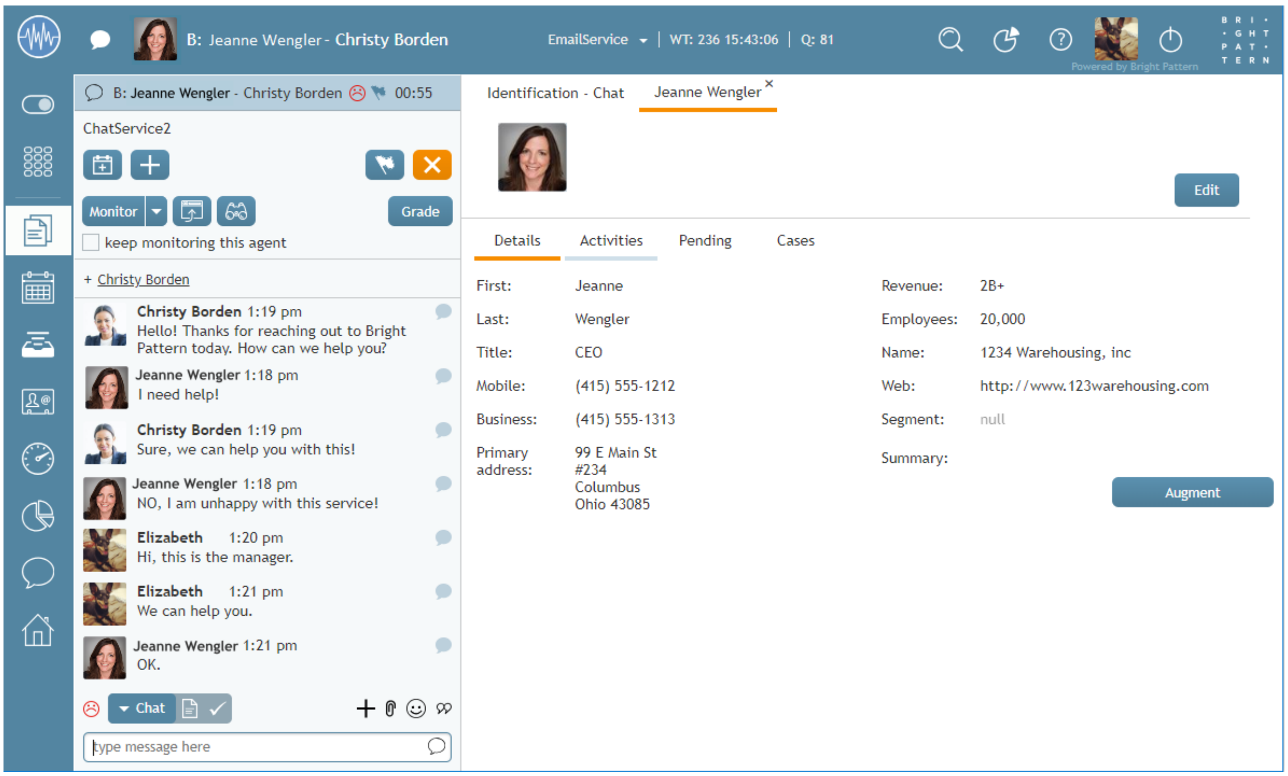
To stop the supervision activity for this call:

Click the **End Call** button.

How to View Agents' Context Information Area

At any time during call supervision, you can view the content of the *Context Information Area* of the monitored agent's desktop. If this area is used to show any customer data related to the call, this may help you understand the context of the agent-customer interaction. To get the content of the *Context Information Area* of the agent's desktop, click the **Pull screen** button .

Note that the screen you will see is the screen that the agent received via screen pop (i.e., if the agent has changed screens after the initial screen pop, you will not see those changes). To monitor an agent's screen in real time, use the screen monitoring function.



An example of a supervisor's screen after barging-in on a flagged chat