

5.8 Calendars

Bright Pattern Documentation

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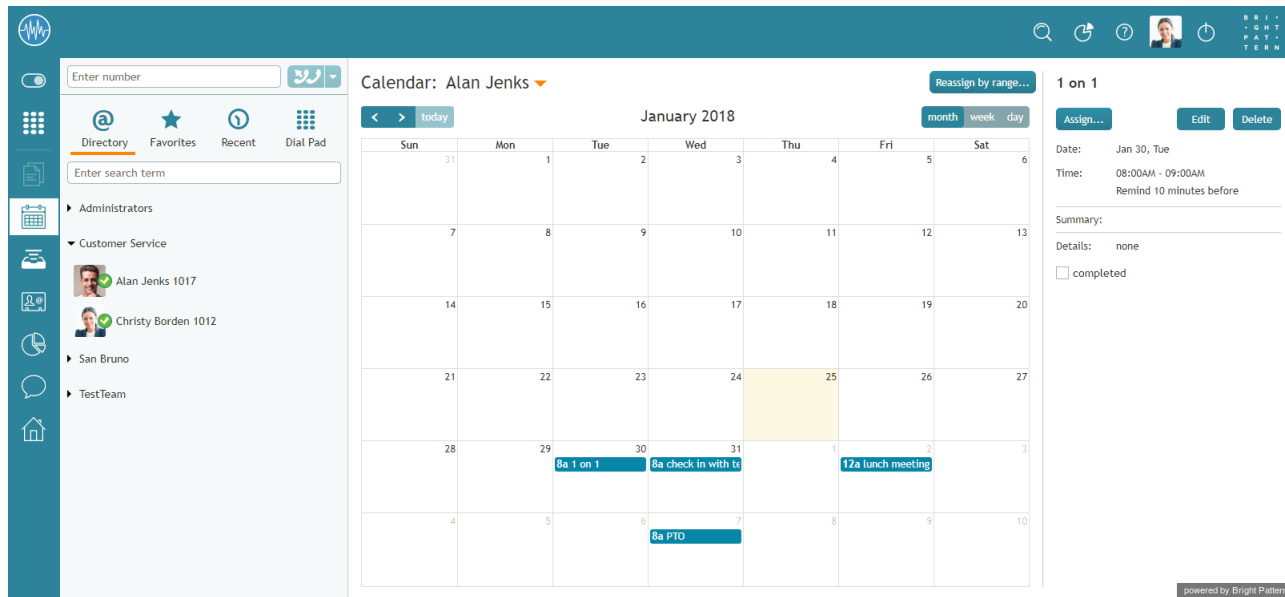
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Overview

Calendar tutorials describe how to manage agent calendars, including reassigning an agent's calendar events.



Managing agent calendars


Section Articles

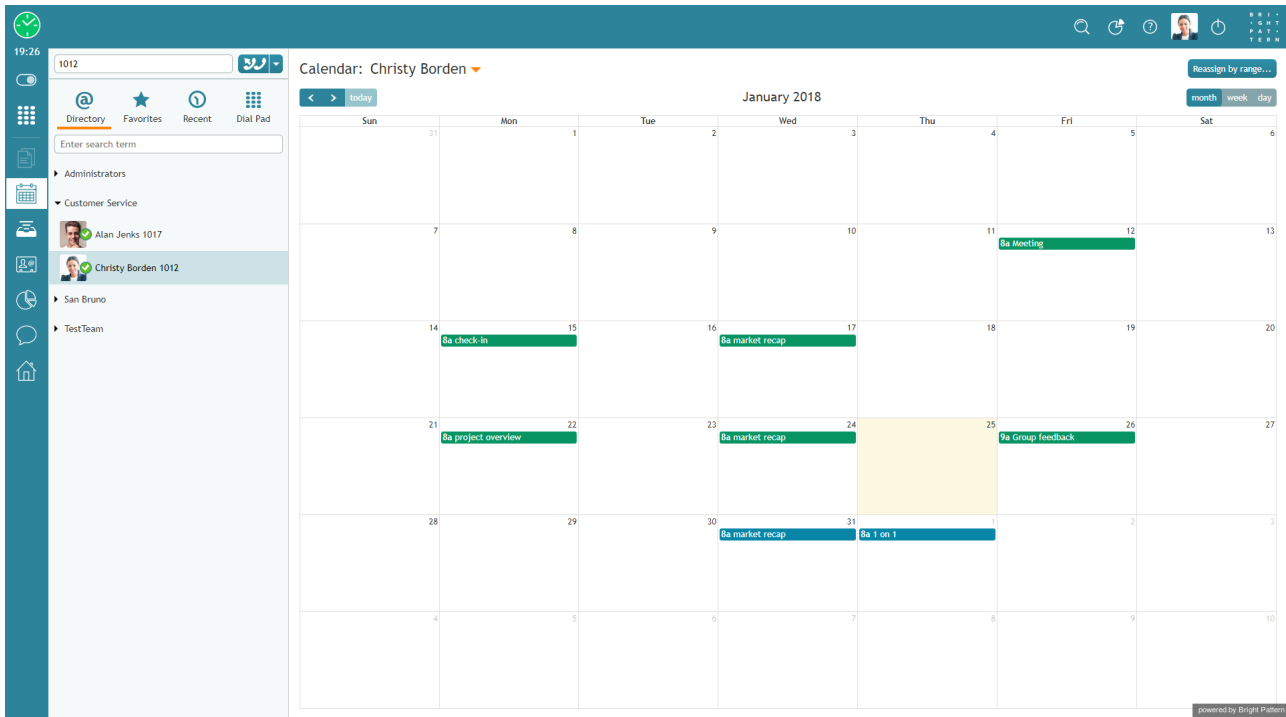
- [How to View an Agent's Calendar](#)
- [How to Reassign an Event](#)
- [How to Reassign All of an Agent's Events to Another Agent](#)

How to View an Agent's Calendar

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

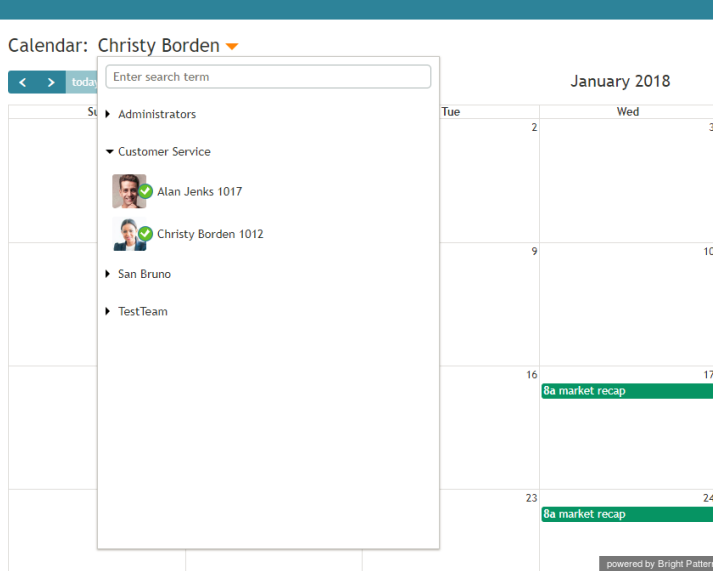
From Your Own Calendar

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



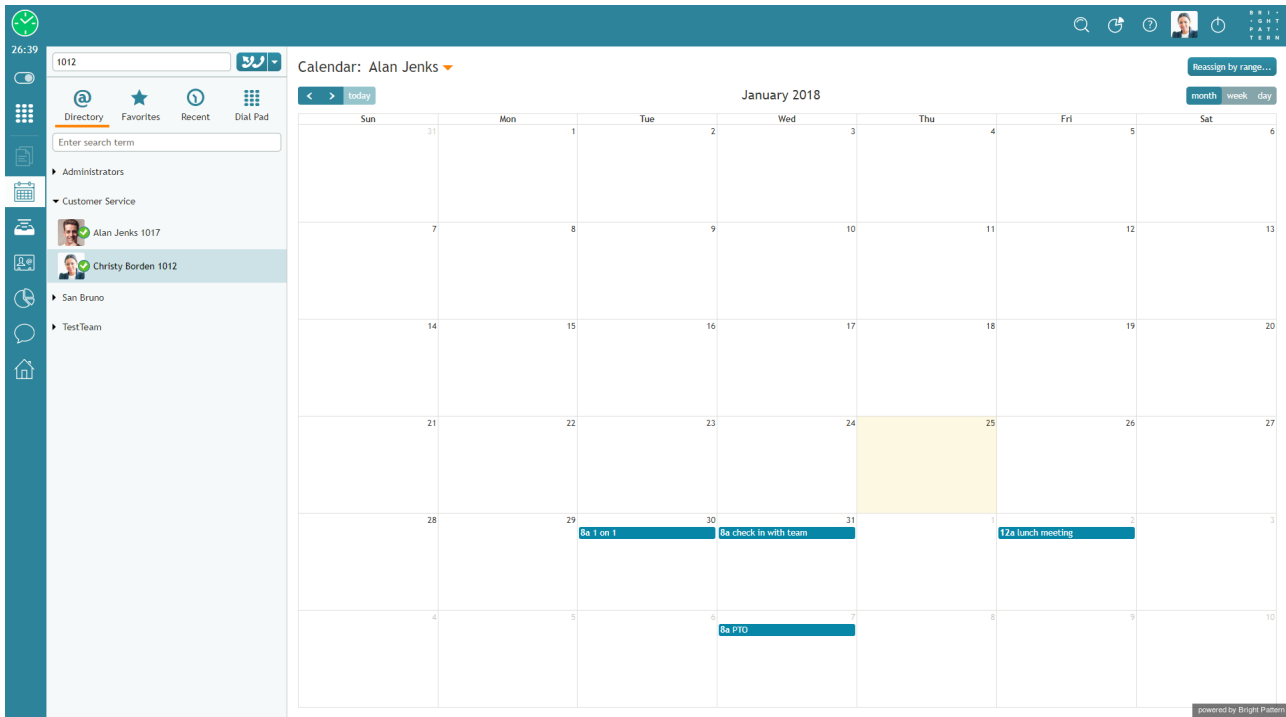
Calendar

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




Select a user from the directory

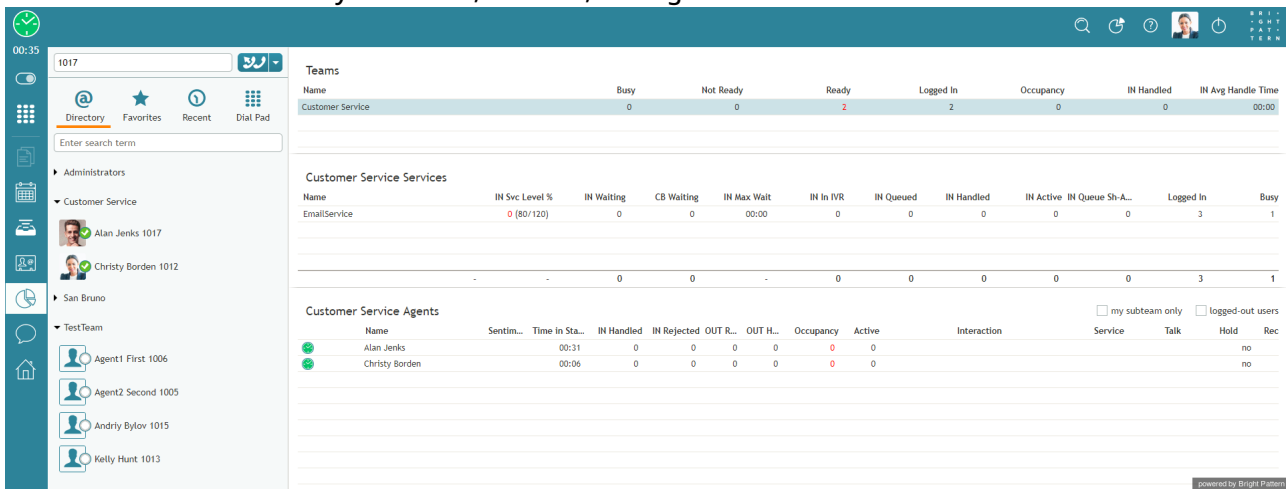
- Select the name of the agent whose calendar you wish to view. The agent's calendar will be shown in your Context Information Area. You can tell whose calendar you are viewing by looking at the name shown at the top of the calendar.



Viewing an agent's calendar

From Your Supervision Screen

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



Supervision metrics in the Context Information Area


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

Teams							
Name	Busy	Not Ready	Ready	Logged In	Occupancy	IN Handled	IN Avg Handle Time
Customer Service	0	0	2	2	0	0	00:00

Customer Service Services											
Name	IN Svc Level %	IN Waiting	CB Waiting	IN Max Wait	IN In IVR	IN Queued	IN Handled	IN Active	IN Queue Sh-A...	Logged In	Busy
EmailService	0 (80/120)	0	0	00:00	0	0	0	0	0	2	0

Customer Service Agents											
Name	Sentim...	Time	OUT H...	Occupancy	Active	Interaction	Service	Talk	Hold	Rec	
Alan Jenks			0	0	0					no	
Christy Borden			0	0	0					no	

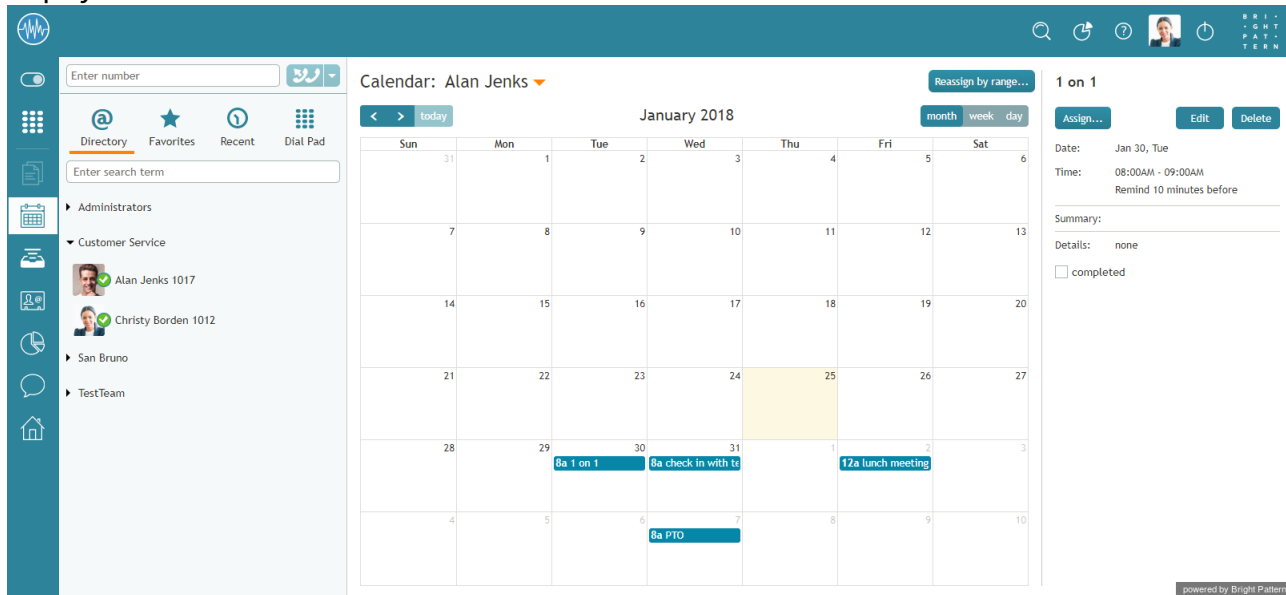
Agent management functions

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

How to Reassign an Event

To reassign a single agent's event to another agent, view the agent's calendar. See section [How to View an Agent's Calendar](#).

1. Select the event in the agent's calendar that you want to reassign. The event properties on the right will display the event information.

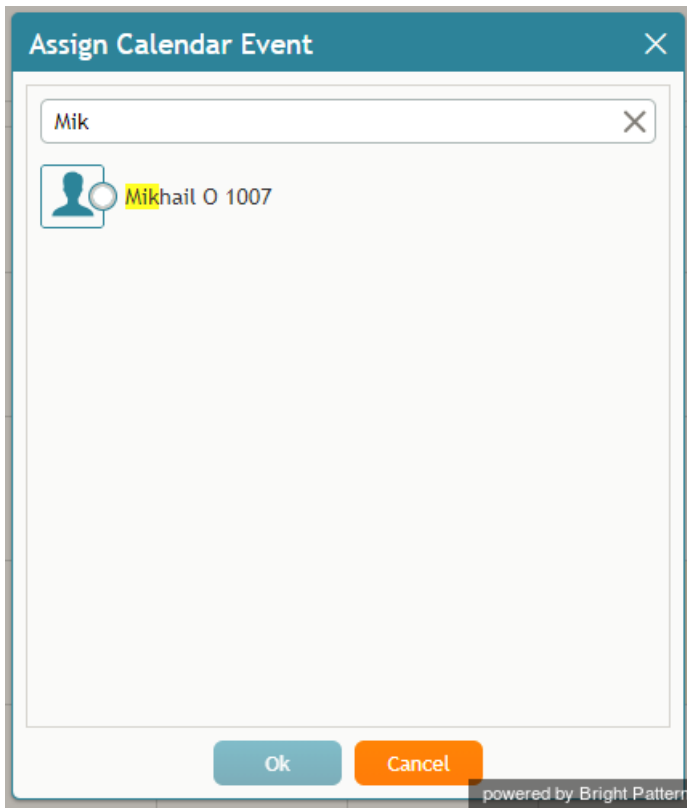


The screenshot shows the 'Calendar: Alan Jenks' interface for January 2018. The calendar grid shows events for the 30th and 31st of January. The '1 on 1' event is selected, and its properties are displayed on the right:

- 1 on 1**
- Assign...** (button)
- Edit** (button)
- Delete** (button)
- Date:** Jan 30, Tue
- Time:** 08:00AM - 09:00AM
- Reminder:** Remind 10 minutes before
- Summary:**
- Details:** none
- completed

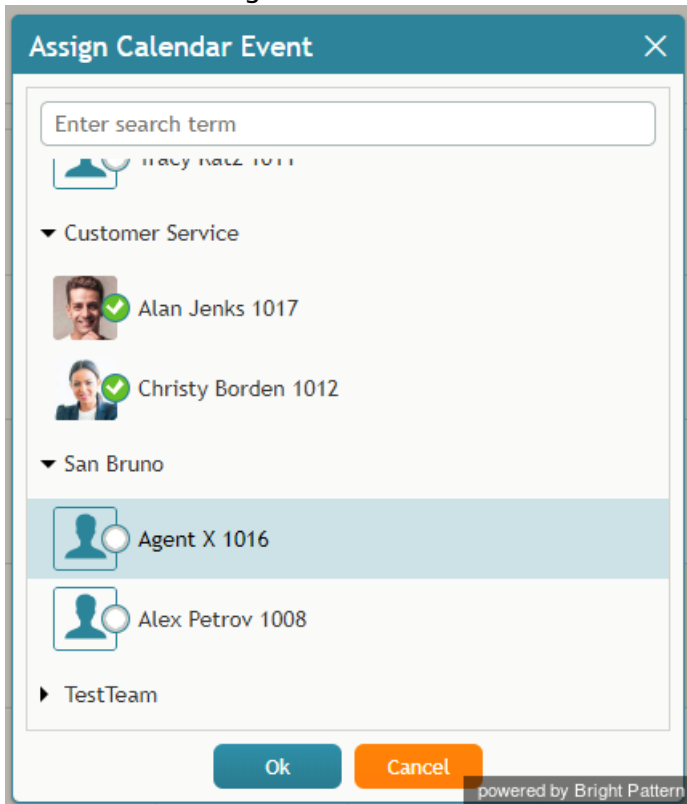
Calendar and event properties

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



You can search for a specific agent

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

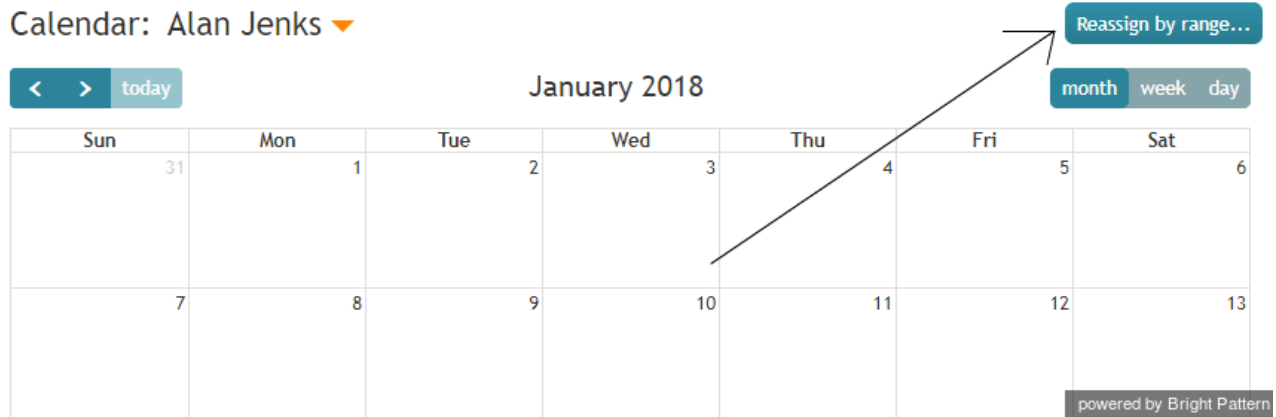


Reassign an event to a selected agent

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

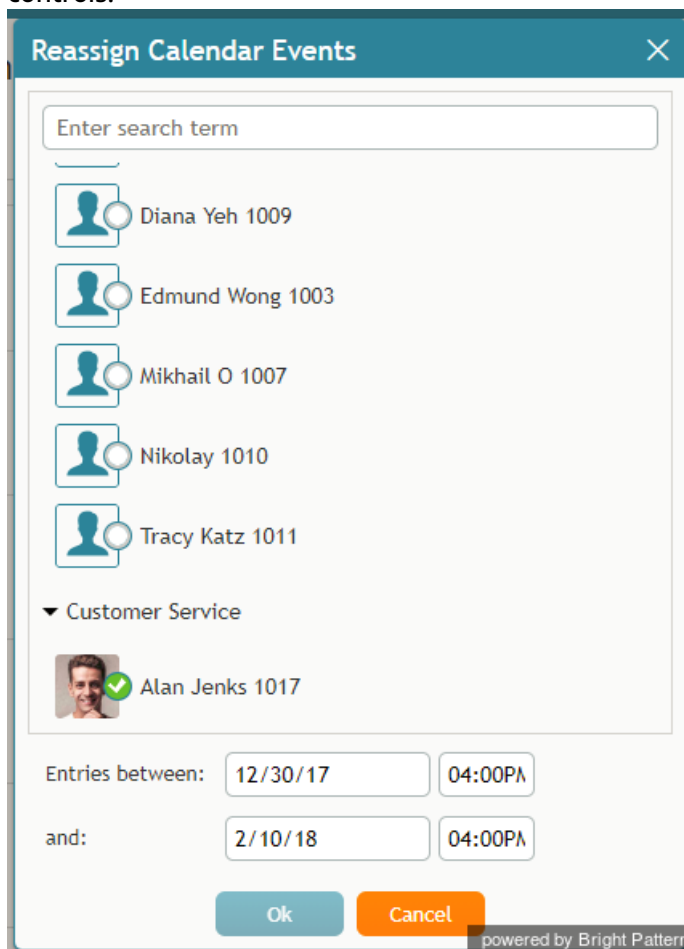
Sometimes it may be more convenient to reassign all of the agent's events within a time range in a single step.

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



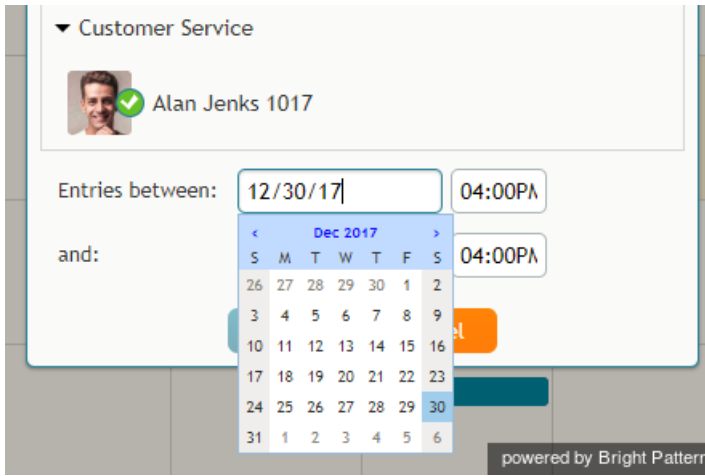
Reassign by Range button

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



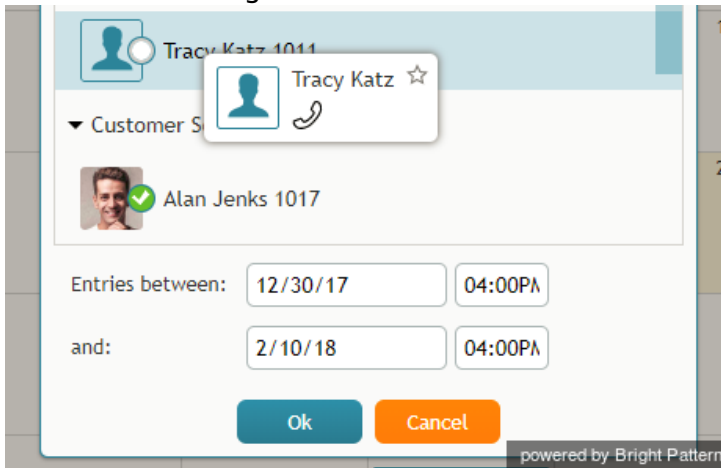
Select an agent to be assigned a range of events

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



Select the date range

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



Select the agent