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Version 5.3.4

Bright Pattern Documentation

Generated: 11/27/2021 2:14 am

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Call Recording and Monitoring

Call recording and monitoring settings are configured in *Quality Management > Call Recording and Monitoring* in the Contact Center Administrator application.

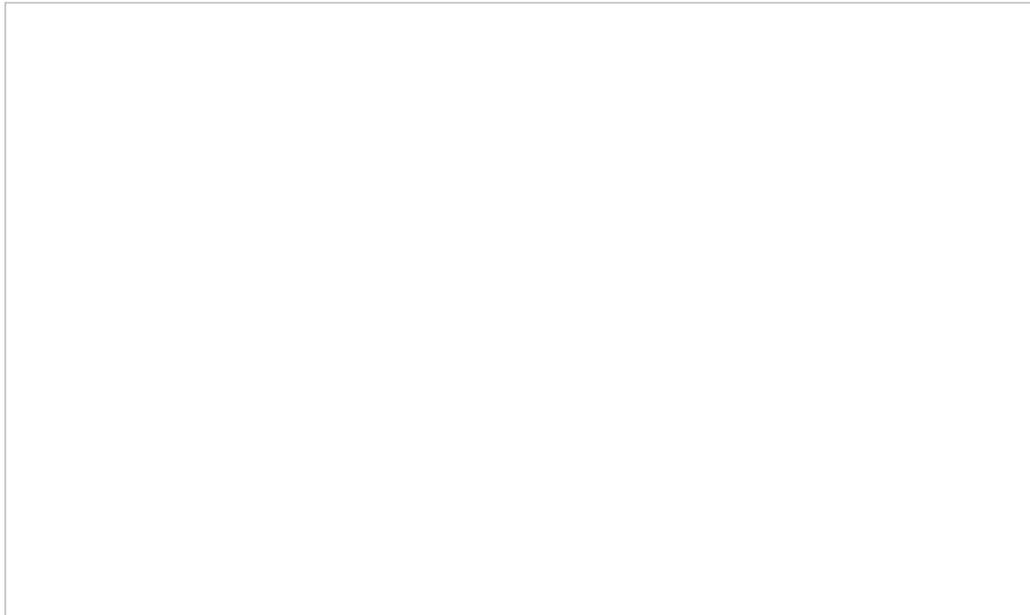
Voice recordings can be subsequently played back via:

- Contact Center Administrator, in the Interaction Record (requires privilege "Listening to all call recordings and view all chat transcripts" or "Listening to call recordings and view chat transcripts on services" in reviewer role; the latter is typically used for BPO client access).
- Agent Desktop, in the contact's Activities (requires privilege "Listen to call recordings and view chat transcripts on assigned services" or "Listening to own call recordings and view own chat transcripts").

Voice recordings can also be exported to an external storage.

Note: [Call Recording](#) is enabled automatically when a supervisor begins [monitoring](#) unless the [Recording during supervisor monitoring](#) setting is disabled.

Settings



Call Recording and Monitoring settings

Call Recording

Select the record calls checkbox to enable call recording. If this property is checked, all voice calls will be recorded (inbound, outbound, and internal).

Regular call recording, where speech of all call participants is recorded to the same file, is performed in the GSM format. Your service provider may also enable multichannel recording for you, where speech of each call participant is recorded to a separate file and is performed in uncompressed PCM 16-bit format. If enabled, the multichannel recording will be performed in parallel with the regular recording and will be controlled by the same recording settings and controls. Note, however, that due to their large size, multichannel recordings are usually stored locally for a limited time (check with your service provider) and can be exported via the [Multichannel Recording](#) API method only.

Additionally, note that this configuration setting can be overridden by the following actions (listed in the order from least to most powerful):

- Configuration settings for a specific service
- Configuration settings for a specific user
- Value of scenario variable $$(doNotRecord)$
- Manual pause/resume recording commands by Agent/Supervisor
- Automatic recording when a call is monitored
- Presume recording using corresponding desktop API methods
- Value of scenario variable $$(banVoiceRecording)$

If a call is transferred, the call recording state is determined by the highest level override present in the main or consult call after transfer. If two or more calls are merged into a conference, the call recording state is determined by the highest level override present in any merged call. Once recording is manually started via API, it can be stopped by only API call or by setting the $$(banVoiceRecording)$ variable. Adding or removing services or other users would not stop the recording started by API.

Play monitoring notification

Select the checkbox for **to agent**, **to customer**, or both to specify who should hear the monitoring notification.

Monitoring prompt

The *Monitoring prompt* is the sound or other audio message that will be used for the monitoring notification. Click **upload** to add a voice file (in WAV format).

Play notification tone periodically

When call is recorded

Select the checkbox for **to agent**, **to customer**, or both to specify who should hear a tone when a call is being recorded.

When call is monitored

Select the checkbox for **to agent**, **to customer**, or both to specify who should hear a tone when a call is being monitored.

Periodic Monitoring or Recording prompt

The *Periodic Monitoring or Recording prompt* is the sound or other audio message that will be used as the notification tone. Click **upload** to add a voice file (in WAV format).

period, sec

Period, sec is the period of time (in seconds) to wait before playing the periodic monitoring or recording prompt again. For example, specifying 10 seconds here causes the periodic monitoring or recording prompt to be played every 10 seconds.

Play notification when recording starts

Select the checkbox for **to agent**, **to customer**, or both to specify who should hear the notification when the recording starts. Note that this notification will play after the manual start of recording only.

Start recording prompt

The *Start recording prompt* is the sound or other audio message that will be played when recording begins. Click **upload** to add a voice file or sound (in WAV format, no more than 3 MB).

Play notification when recording stops

Select the checkbox for **to agent**, **to customer**, or both to specify who should hear the notification when the recording stops. Note that this notification will play after the manual stop of recording only.

Stop recording prompt

The *Stop recording prompt* is the sound or other audio message that will be played when recording ends. Click **upload** to add a voice file or sound (in WAV format, no more than 3 MB).

Recording during supervisor monitoring

This setting allows you to control whether agents are recorded during [supervisor monitoring](#) or not. Prior to version 5.3.12, when a supervisor began a call-monitoring session, the recording of such a call would begin unconditionally. While this continues to be the default behavior, you can now disable automatic recording of monitored calls by deselecting the *Automatically record monitored calls* checkbox. Please note that if the *Automatically record monitored calls* checkbox is selected, monitored calls will be recorded whether the [Call Recording](#) option is enabled for your contact center or not.

Recording after external transfer

Stop recording of calls transferred outside

For voice services, you can discontinue call recording upon transferring a call to an external number.

Instances in which you may not want to record calls include when:

- Customers require calls not to be recorded after transfer to an external number.
- Customers require just the consult portion of the call to be recorded in order to have reference data for the agent.
- Agents must not record calls when transferring to a specific agent.

Continue recording of calls transferred outside

This selection specifies that the call will be recorded even after the transfer.

except when calling the following numbers

To create exceptions to your call recording/stopping selections, click **add**.

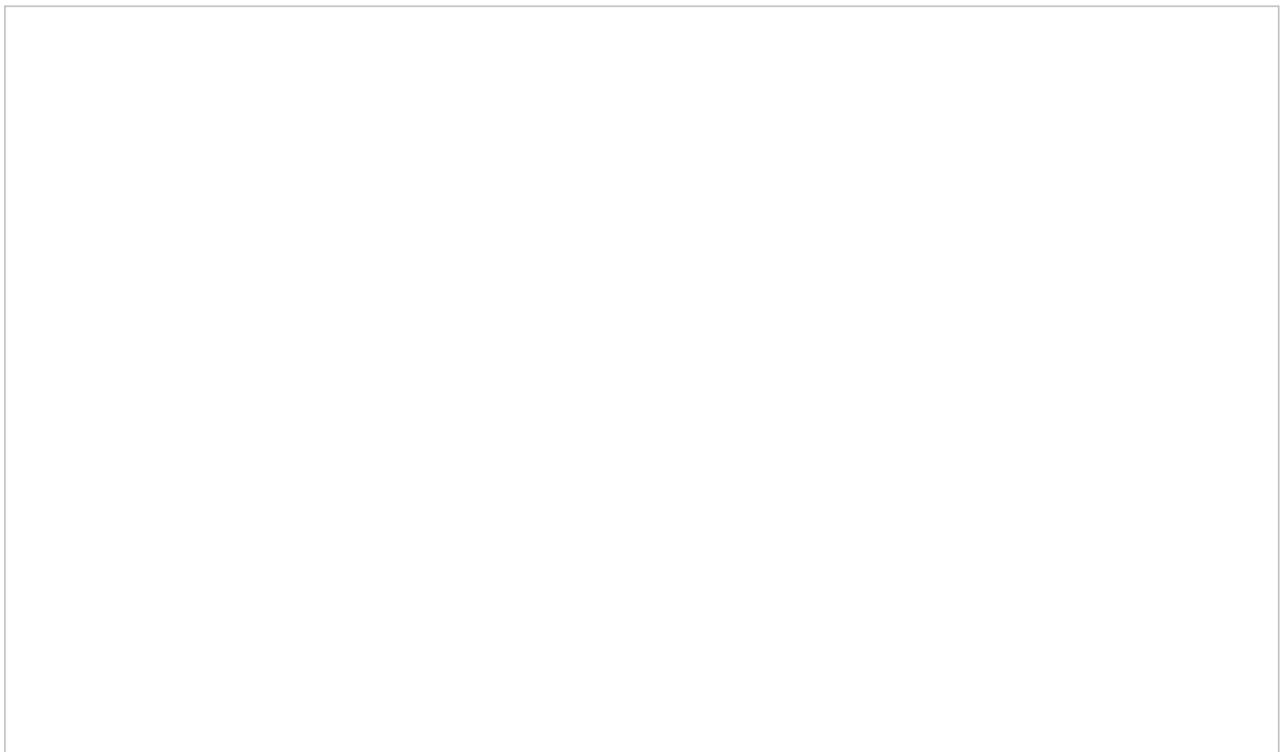
Scheduling Reports

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.

Repeat until

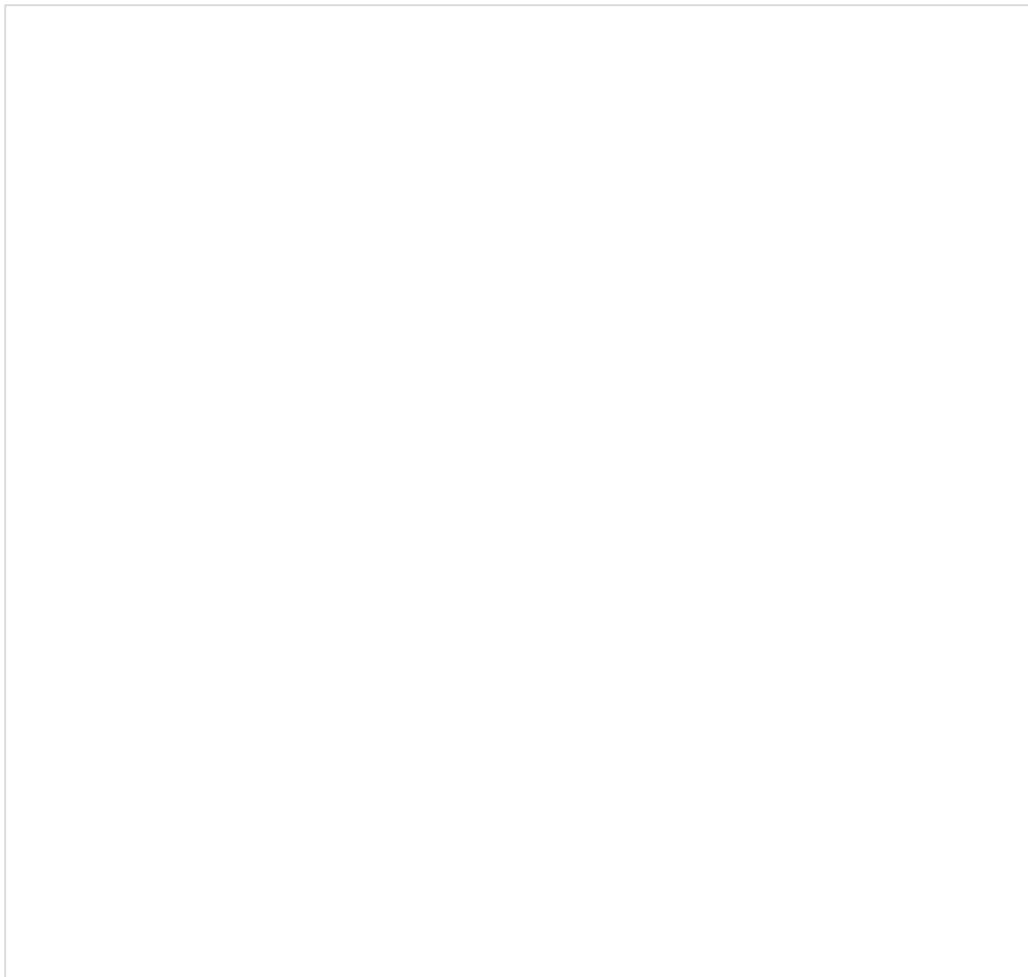
If you selected how often the report run should be repeated, you should specify the time when the report should stop being repeated.

Report Parameters

The Report Parameters section includes only the parameters relevant to the selected report name.

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

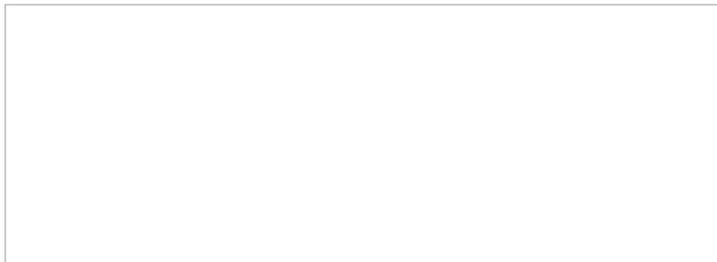
The *Subject* is the subject line of the email message to be sent.

\$()

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 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 displays the time zone as defined in the [Report Schedule](#) section.



Click \$() to insert a variable in the Subject or Message

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

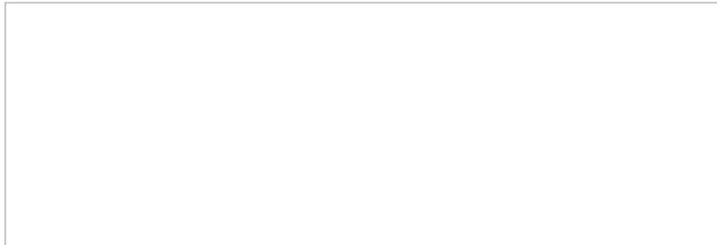
Destination folder and file name is where the scheduled report will be saved.

\$()

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 displays 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 username.

Test connection

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

Working with Controls

Form controls are the building blocks of your form. You can easily drag them on and off the form canvas. This section describes how to add, edit, and remove form controls in Form Builder's Static Layout Editor.

For more information about form controls and their properties, see the next section of this guide, *Dynamic Layout Editor Controls*, which includes all the form controls available in the Dynamic Layout Editor view. Note that these controls are not available in the Static Layout Editor view.

How to Add Controls

Controls are dragged and dropped onto and off of the form canvas. After a control has been placed on the form canvas, you can drag it to a different location on the form. Once a control has been placed, mousing over it will display a pencil icon for editing the control's properties.

How to Edit Controls

Once a control has been placed on the form canvas, mousing over it will display a pencil icon for editing the control's properties. Click the pencil icon to edit the control's field properties.

The properties will open in a pop-up dialog. If you do not wish to edit properties in the pop-up dialog, you can opt to dock the properties to the form canvas by clicking the *Dock to main window* button.

How to Remove Controls

Mousing over a control on the form canvas will display a trash icon to delete the control. Click the trash icon to remove the control from the form.

Style

Note that all controls that may have text in them have a common property called *Style*. Styles control the appearance of the static text on your form, such as font type, font size, text color, and alignment.



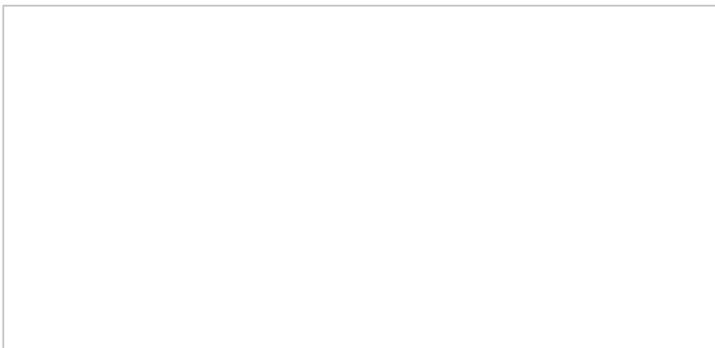
Editing form field styles

Bright Pattern Contact Center software provides a number of predefined styles that you can select from the drop-down menu. You can edit any of such predefined styles, or you can create your own styles from scratch:

1. Select the style that you wish to edit from the drop-down menu (to create a style from scratch, select **None**).
2. Click **Add / Edit**.
3. Specify style properties.

Data Fields

The values of many form components can be defined in data fields as [scenario variables](#) in the $$(varname)$ format.



Example of a variable in a data field