Version 5.3.6

Bright Pattern Documentation

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Privileges

Registered users of your Bright Pattern Contact Center solution are assigned*privileges* that can be used to control access to various contact center functions. Privileges are arranged in the same way as they appear on the Roles page of the Contact Center Administrator application. For general information about privileges and roles, see section Roles.

Privileges are organized into seven categories (i.e., groups):

- Interaction Handling
- Quality Management
- Security and Administration
- Service and Campaign Administration
- Supervision
- System Administration
- BPO Client

Note: Some service configuration changes that affect agent behavior are not picked up dynamically by Agent Desktop. Thus, after making a change to privileges, we recommend that all affected agents re-login to Agent Desktop.

Interaction Handling group

Access full-screen Agent Desktop

The *Access full-screen Agent Desktop* privilege allows the user to enable full-screen Agent Desktop view within CRM applications.

Because CRM systems typically have their own email and case management capabilities, the full-screen mode normally would be used by supervisors only.

Delete contacts

The *Delete contacts* privilege allows the deletion of contacts. If enabled, users can delete individual contacts via the Agent Desktop. When a contact is deleted, its activity history is deleted too. Cases are not deleted automatically.

Edit contacts

The *Edit contacts* privilege provides write access to contacts. If enabled, users can create new contacts, and users can modify any fields in existing contacts (but not activity history).

Force pop-out phone window

The *Force pop-out phone window* privilege allows the user to open Agent Desktop in a pop-out window. For more information, see section Understanding Screen-Pop of the *Agent Guide*.

Enabling this privilege is generally not recommended if you plan to deliver activity forms and/or other web content to agents via screen pop.

Note that if the user has any privileges in the *Supervision* group (see below), the user will not be able to open Agent Desktop in a pop-out window even if the user has this privilege.

Handle automatically distributed interactions

The *Handle automatically distributed interactions* allows the user to receive calls from a service queue and preview records. This is the basic privilege that allows the user to perform typical call center agent work (i.e., provide services over the phone and participate in outbound campaigns).

The ability to handle customer chat or email interactions is controlled via separate privileges (see *Handle email* and *Handle service chat*).

Handle email

When enabled, the *Handle email* privilege allows users to:

- Edit cases
- Create new cases manually
- Open cases from search results (even if they are already open by other agent)
- Mark cases as spam

Handle service chats

With the *Handle service chats* privilege, the user may handle chat interactions with customers. This includes chat interactions started by customers via SMS.

Note that the ability to initiate a chat with a customer via SMS is controlled by a separate privilege (see*Initiate SMS conversation*). Likewise, the ability to use internal chat is controlled by a separate privilege (see*Send internal chats*).

Initiate SMS conversation

The *Initiate SMS conversation* privilege allows the user to initiate chats with customers via SMS.

Listen to call recordings and view chat transcripts on assigned services

With this privilege granted, the user may review call recordings and chat transcripts of the services that the user is qualified to handle (i.e., has corresponding service skills).

Listening to own call recordings and view own chat transcripts

This privilege provides Agent Desktop users the capability, via activity history, to access recordings where the agent participated (at least partially). This privilege applies to Agent Desktop only.

Login to Agent Desktop

Login to Agent Desktop allows the user to log in to Agent Desktop application and perform basic back-office telephony functions. Any user who needs access to Agent Desktop must have this privilege. Note that this privilege alone is not sufficient for performing typical contact center agent work.

Note that any user who logs into Agent Desktop will be counted as a concurrent user for the duration of the login session. Your service provider may impose a limit on how many of your users may be logged on concurrently.

Make external calls

A user with the *Make external calls* privilege may make external calls and blind transfers to external destinations from the Agent Desktop application. If the user does not have this privilege, an attempt to make an external call or blind transfer will result in a text error message displayed on Agent Desktop.

Note that the absence of this privilege does not prevent users from making external calls using the dial pad of their hardphones.

Mask original email content

The *Mask original email content* privilege allows the user to mask fragments of original customer email text. For more information, see section How to Mask Sensitive Data of the *Agent Guide*.

Modify own identification data

The *Modify own identification data* privilege allows the user to be able to modify specific fields of the user profile. If the privilege is not present, the following fields are locked:

- First Name
- Last Name
- Chat Nickname

See other agents/teams in directory

This privilege lets the user see all configured teams and team members in the Agent Desktop directory and view their current availability (presence). For more information, see section How to Use the Directory of the *Agent Guide*.

See other agents' cases

See other agents' cases allows the user to see cases handled by other agents. If the user does not have this privilege, the user will be able to see only cases that with which the user has worked. This privilege affects case search only. Absence of this privilege does not affect the user's ability to receive emails related to existing cases that the user has not worked on.

Send internal chats

The *Send internal chats* privilege allows the user to initiate internal chat conversations.

Start recording of interactions

With this privilege, the user may start call recording.

Stop recording of interactions

Stop recording of interactions allows the user to stop call recording.

Transfer calls

The *Transfer calls* privilege allows the user to transfer customer interactions to consultation parties and host conferences (both via-consultation and single-step).

Absence of this privilege does not affect user's ability to

- make blind transfers of customer interactions
- transfer or conference internal calls

Use Calendar

The *Use Calendar* privilege enables users to use the Agent Desktop calendar for scheduling.

Use Favorites tab

Use Favorites tab is an agent-level privilege that controls whether the user can see and set favorites from the Agent Desktop application. This privilege is an agent behavior control to prevent users from dialing destinations that they should not based on FCC/TCPA and organizational rules.

Use Recent Calls tab

The *Use Recent Calls tab* privilege lets the user restrict access to recent calls. This privilege uses TCPA manual dialing to limit which agents can access recent calls.

Use RightNow

Use RightNow allows the user to use Agent Desktop embedded into the Oracle Service Cloud application (formerly called RightNow). This privilege enables access to the Agent Desktop widget within Oracle Service Cloud.

For more information, see the *Oracle Service Cloud Integration Guide*.

Use ServiceNow

Use ServiceNow allows the user to use Agent Desktop embedded into the ServiceNow application. This privilege enables access to the Agent Desktop widget within ServiceNow.

For more information, see the *ServiceNow Integration Guide*.

Use Zendesk

With the *Use Zendesk* privilege, the user may use Agent Desktop embedded into the Zendesk application. This privilege enables access to the Agent Desktop widget within Zendesk. To enable full-screen Agent Desktop view within Zendesk application, the user must also have the *Access full Agent Desktop* privilege.

For more information, see the *Zendesk Integration Guide*.

Quality Management

Accept/dispute evaluations of their interactions by others

Accept/dispute evaluations of their interactions by others allows the user to accept or dispute a quality management evaluation of herself.

Assign evaluations and calibrations

Assign evaluations and calibrations allows the user to assign quality management evaluations and calibrations to other users.

Confirm evaluations of supervised agents

Confirm evaluations of supervised agents allows the user to accept or dispute quality management evaluations of users with the Supervisor role.

Delete evals completed by anyone

Delete evals completed by anyone allows the user to delete evaluations of agents in the user's assigned team unless the privilege Manage evaluations across teams is enabled for the same user.

Delete evals completed by themselves

Delete evals completed by themselves allows the user to delete quality management evaluations completed by himself.

Edit evaluation forms

Edit evaluation forms allows the user to edit quality management evaluation forms in the Evaluation Form Editor application. Note that if a form is assigned to a service or campaign, to edit it, one needs either the Manage all services and campaigns privilege or the Manage assigned services and campaigns privilege to edit that service.

Edit public interaction searches

Edit public interaction searches allows the user to edit the public searches seen in the Agent Desktop application, section Quality Management > Eval Home.

Evaluate agent interactions

Evaluate agent interactions allows the user to evaluate agent interactions in the Agent Desktop application, section Quality Management.

Evaluate own interactions

Evaluate own interactions allows users to evaluate their own interactions and is assigned to agents by default; supervisors or evaluators are meant to confirm these evaluations. Note that these evaluations can be confirmed by a user's supervisor or a supervisor assigned to a user's team only.

Manage evaluations across teams

Manage evaluations across teams removes the restriction of only applying actions and accessing the quality management evaluations of the agents in the teams assigned to the user.

See evals of self

See evals of self allows the user to see quality management evaluations of herself as completed by other users.

Security Administration group

Can edit and erase interaction records

This privilege provides access to the manual erasure functions in accordance with PCI DSS 3.2 and GDPR requirements. With this privilege enabled, users will be able to edit and erase interaction records securely and manually in the event that another user has mistakenly included a customer's sensitive data in interaction content (e.g., call recording, chat, etc.).

This privilege is added to predefined Security Administrator and System Administrator roles.

Grant all privileges

Grant all privileges allows the user to grant any privilege, regardless of the user's *May grant or revoke* settings with respect to specific privileges. This is helpful during product upgrades where new privileges may be introduced.

Manage roles and security settings

With this privilege enabled, the user has full access to the following settings:

- Roles
- Security Policy
- System Access Restrictions
- Encryption Key Management

Service and Campaign Administration group

Configure reporting settings

With this privilege enabled, the user has full access to the following settings:

- Report Templates
- Scheduled Reports
- Reporting Settings

Configure system-wide settings

The *Configure system-wide settings* privilege gives the user full access to all pages of the following menus: *Tasks*, *Call Center Configuration*, and *Quality Management*.

For tasks, note that all users who have the *Configure system-wide settings* privilege enabled will receive an email notification each time a scheduled task fails.

Control campaign operations

Control campaign operations enables the user to view and control assigned campaigns via Agent Desktop.

A user must have this privilege in order to be available for selection as a service/campaign operator via the *Services and Campaigns* > *Assignments* page. In the Agent Desktop application, access will be limited to campaigns where the user is assigned as an operator.

If this privilege is revoked from a user, the user's name will appear in red color in the list of operators of any services/campaigns that the user may have been previously assigned to operate.

Edit knowledge base

The *Edit knowledge base* privilege gives the user full access to the Knowledge Base via the Contact Center Administrator application. It also allows the user to create articles in the *Knowledge Base* via the Agent Desktop application.

Note that access to the *Knowledge Base* via the Agent Desktop application is provided in the context of the services that the user can handle.

Manage all services and campaigns

The *Manage all services and campaigns* privilege allows the user to configure all existing services campaigns regardless of whether the user is assigned to them as an administrator. Note that in order to assign teams to campaigns, the user must also have the *Manage teams* privilege.

Another privilege exists to enable the user to access only assigned services campaigns (see below). Note that in order to prevent the user from creating new services and campaigns, both these privileges must be disabled.

Manage assigned services and campaigns

With this privilege, the user has full access to configuration of the services and campaigns that the user is assigned to as an administrator. For more information, see section Services and Campaigns - Assignments Tab.

Note that in order to assign teams to a service/campaign, the user must also have the*Manage teams* privilege.

Another privilege exists to enable the user to access all configured campaigns regardless of assignment (see above). Note that in order to prevent the user from creating new campaigns, both these privileges must be disabled.

Manage lists

The *Manage lists* privilege gives the user full access to calling lists and do-not-call (DNC) lists. Absence of this privilege does not affect the user's ability to associate existing lists with campaigns.

Manage scenarios

The *Manage scenarios* privilege allows the user to create, view, and edit scenarios. Absence of this privilege does not affect the user's ability to configure scenario entries and associate such entries with existing scenarios.

Manage skills

With the *Manage skills* privilege, the user may create and edit existing auxiliary skills and assign skills to agents with specific levels.

Use SMS/MMS API

This privilege allows the user to use the SMS/MMS API to send and receive SMS/MMS messages. Note that in addition to granting this privilege, the contact center administrator also must create a role, a user with the *Use SMS/MMS API* property, and generate an API key.

Supervision group

Access Real-time Stats API

The *Access Real-time Stats API* privilege gives the user access to applications that are connected to Bright Pattern Contact Center via the Real-time Stats API; this includes viewing the wallboard application. **Note**: The availability of data on the Agent Desktop Home Screen is not affected by this privilege, with the exception of the wallboard icon.

All assigned teams combined view

When enabled, this privilege will show, on the supervisor's home screen, the agents from all teams assigned to the logged in supervisor, specifically with the following metrics:

- State
- Time in State
- Not Ready Reason (if not ready for a reason)
- Team (new metric)
- Active interactions

It shows all services that are the teams are assigned to (individual services can be hidden if needed), specifically the following metrics:

- Calls in Queue
- Service Level

- # of Agents in Queue
- # of Ready Agents
- Current Max Wait Time (for calls in Queue)

Can see contents of email push queues

This privilege allows supervisors of teams with[the push distribution method](#) enabled to view push queues. Push queue items appear in team queues when the “All Services with Push Queues” option is selected; however, it is possible to select only one service and see only its queue.

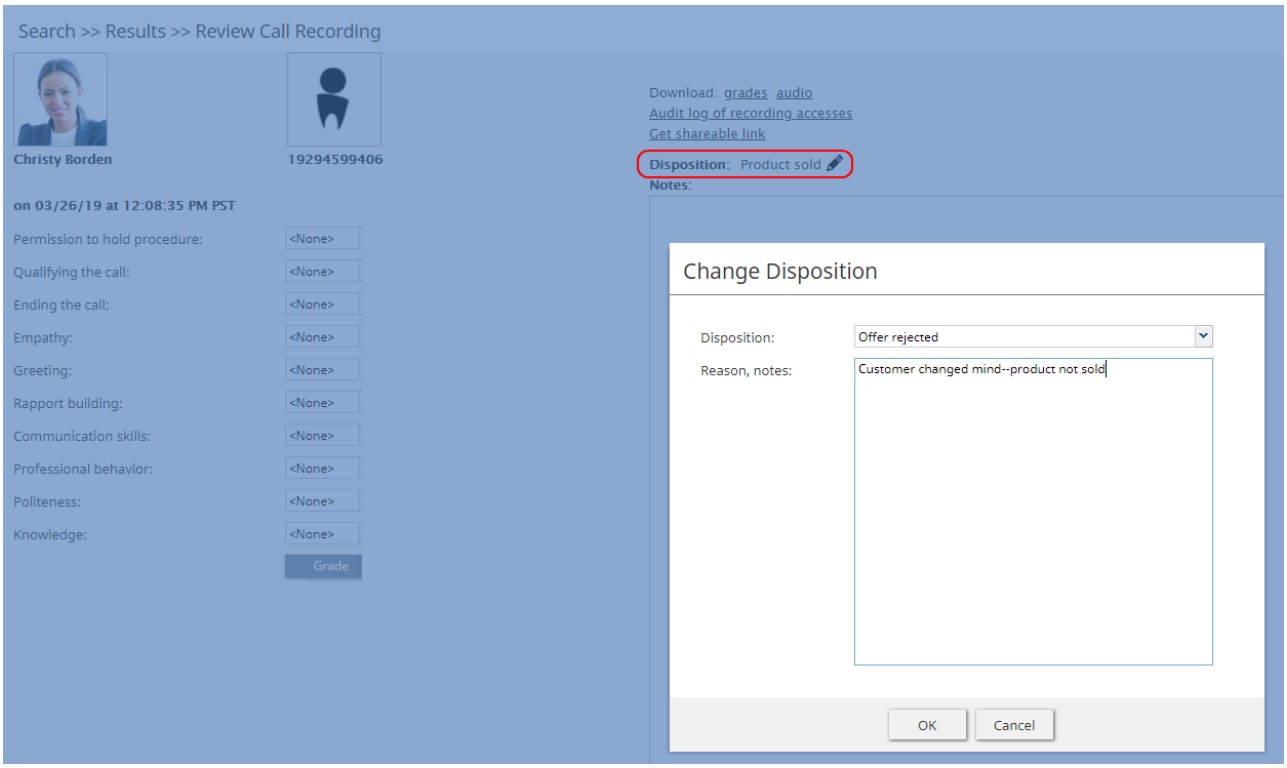
While looking at a push queue, a supervisor can:

- Sort the queue as they like (i.e., using existing pull queue sort controls)
- Assign an item to an agent
- Assign one or more items to another queue and skill requirement
- Open an item to work with
- Delete an item or mark it as spam

Note that this setting is not assigned to any roles by default.

Can update final dispositions

This privilege enables users to update dispositions when final. A final disposition can be updated in the interaction record by clicking the Change Disposition button.



Changing final disposition in Interaction Records Search Results record

For more information about interaction records, see section [Interaction Records Search](#) and [Search Results](#).

Can use agent seat maps

This privilege provides users access to the Agent Seating Map application; it is required for creating and editing agent seating maps. For more information, see the *Agent Seating Map Guide*.

Change alert configuration

Users with the *Change alert configuration* privilege may enable/disable alerts available for some real-time metric displayed via Agent Desktop, change their appearance, and modify threshold values that trigger such alerts.

Note that the ability to set configured alerts as system-wide defaults is controlled via a separate privilege (see *Set alerts for real-time metrics system-wide*).

If the user does not have this privilege, the Alert Configuration dialog of the Agent Desktop will provide read-only information about the current alert configuration.

Change real-time metric views

The *Change real-time metric views* privilege allows the user to add metrics to, and remove them from, any real-time metric views of the Agent Desktop application. The user may also change the order in which the metrics appear in the table views.

Absence of this privilege does not affect the user's ability to add services and campaigns to, and remove them from, real-time metric views.

Note that the ability to set created real-time metric views as system-wide defaults is controlled via a separate privilege (see *Set real-time metric views system-wide*).

Customize Wallboards

The *Customize Wallboards* privilege allows additional elements to appear on the user's wallboard. These elements include title, selector, flip arrows, and menu. Using these elements, users can customize the look and display of their Agent Desktop wallboard. Using the Wallboard Layout Editor, cards and cells can be added, deleted, scaled, and expanded using mouseovers, click-and-drag, and drag-and-drop movements.

Define/View subteams of selected agents

The privilege *Define/View subteams of selected agents* enables subteam controls to be displayed in Agent Desktop and the Reports portal. In addition, the privilege allows users to switch between them. Subteams are smaller groups of agents that supervisors have selected from full teams.

Delete cases

The *Delete cases* privilege allows the deletion of cases. If enabled, users can delete individual cases via the Agent Desktop. When a case is deleted, all interactions related to a case are deleted.

Download recordings and transcripts

With this privilege, the user may download call/screen recordings, chat transcripts, and email messages from the interaction search and review pages of the Contact Center Administrator application.

Force agent states

The *Force agent states* privilege allows the user to change current agent states of members of any team that the user is assigned to supervise.

Listen to recordings linked to external CRM records

This privilege allows the user to listen to call recordings linked to activity history in the CRM records.

Listening to all call recordings and view all chat transcripts

With *Listening to all call recordings and view all chat transcripts*, the user may review voice recordings and chat transcripts via the Contact Center Administrator application.

Absence of this privilege does not affect the user's ability to review screen recordings in theAgent Timeline or email messages in the Interaction Search.

When removing this privilege from a user, make sure this user also does not have the privilege*Listen to call recordings and view chat transcripts for assigned services* in the *BPO Client* group (see below).

Manage canned chat responses system-wide

The *Manage canned chat responses system-wide* privilege allows the user to make canned chat responses available to all other agents of the contact center. For more information, see section How to Create and Edit Canned Chat Responses of the *Agent Guide*.

Monitor agent screen

When enabled, the *Monitor agent screen* privilege allows the user to view and monitor the screens of a selected agent that the user is assigned to supervise.

Monitor interactions

The *Monitor interactions* privilege allows the user to connect to calls handled by agents that the user is assigned to supervise in silent monitoring, coaching, and barge-in modes. For more information, see section *Call Monitoring, Coaching and Barge-In* of the *Supervisor Guide*.

Pull screen pop

Pull screen pop allows the user to get snapshots of the *Context Information Area* of the desktops of agents that the user is assigned to supervise. Note that in order to be able to get a snapshot, the user must be connected to the agent in one of the call monitoring modes. Thus, the user also must have the privilege *Monitor interactions* (see above).

Push/Pull Global Wallboards

Users with the privilege *Push/Pull Global Wallboards* can push their personal wallboards to other users and/or teams, as well as pull shared wallboards from a global pool. Note that only global wallboards can be pulled.

Set alerts for real-time metrics system-wide

This privilege allows the user to set alerts that the user configures as system-wide defaults. Note that in order to use this privilege, the user must also have privilege *Change alert configuration*.

Set real-time metric views system wide

Set real-time metric views system wide allows the user to set real-time metric views that the user configures as system-wide defaults. Note that in order to use this privilege, the user must also have the privilege *Change real-time metric views*.

For more information, see section Customization of Metric Views of the *Supervisor Guide*.

View historical reports

The *View historical reports* privilege allows the user to generate and view reports via the Contact Center Administrator application. Absence of this privilege does not affect the user's ability to access any of the general reporting settings or be a recipient of emailed scheduled reports.

View interaction records

With this privilege, the user may search for and review interaction records via the Contact Center Administrator application.

Absence of this privilege does not affect the user's ability to generate and view the Call Detail Report or Email Detail Report. To prevent access to these reports, use privilege *View historical reports* (see above).

View real-time agent metrics

View real-time agent metrics allows the user to view real-time metrics for the agents of the teams that the user is assigned to supervise.

View real-time service metrics

With *View real-time service metrics*, the user may view real-time metrics for all services associated with the teams that the user is assigned to supervise.

Absence of this privilege does not affect the user's ability to view campaign-specific metrics. To prevent access to these metrics, use privilege *Control campaign operations* (see above).

Watch agent screen recordings

The privilege *Watch agent screen recordings* allows supervisors to search for and view the screen recording sessions of agents on their teams. The screen recordings appear in interaction records in agent timeline searches. If a screen recording is available for the selected agent, and if the privilege is enabled, then the *Watch screen recording* button is shown to the supervisor.

System Administration group

Privileges associated with system administration are described as follows.

Allow recording export API access

This privilege allows users to access the Interaction Content API that retrieves call recordings and metadata based on the call identifier.

Bulk Export/Import Contacts

When enabled, the privilege *Bulk Export/Import Contacts* allows the export/import icon on the Agent Desktop Contacts screen to be shown.

Bypass Single Sign-On

Users with this privilege can log in to any Bright Pattern application (e.g., Contact Center Administrator, Agent Desktop, etc.) via a direct authentication method (i.e., with Bright Pattern username and password), even if a corporate-level single sign-on (SSO) is configured for the given contact center.

Users without the privilege should not be able to log in with their Bright Pattern credentials when SSO is enabled; they should, however, be able to log in when it is disabled. By default, this privilege is enabled only for the pre-defined System Administrator role.

If SSO is configured for a contact center, users with this privilege can bypass single sign-on by using special URLs that take the following form:

https://<tenant.domain.com>/admin/?bypass-sso=1

https://<tenant.domain.com>/agentdesktop/?bypass-sso=1

Configure Contact Forms and fields

The *Configure Contact Forms and field* privilege allows users to edit contact, activity history, and augmentation and case forms.

Configure directory

The *Configure directory* privilege allows the user to create and modify external contacts that appear in the Directory of the Agent Desktop application.

Manage BPO Clients

When enabled, the *Manage BPO Clients* privilege allows users to:

- Create, edit, and delete BPO clients in the Contact Center Administrator application
- Assign forms and teams to BPO clients

Manage all teams

If granted the *Manage all teams* privilege, the user may

- create teams and change configuration of all existing users and teams
- create users and change configuration of existing users, provided that the user also has the *Manage users* privilege (see below)
- assign skills to, and change skill levels of, all existing agents, provided that the user also has the *Manage skills* privilege (see above)

For more information, see sections Users, Teams, and Skill Levels.

Note that if a user is assigned as a supervisor of a particular team, the absence of this privilege does not affect the user's ability to change most of the configuration settings of the given team and its current members.

Manage phones

The *Manage phones* privilege gives the user full access to configuration of softphones, hardphones, access numbers, and scenario entries. Absence of this privilege does not affect the user's ability to assign phone numbers to users.

Manage users

The *Manage users* privilege allows the user to create users and change the configuration of existing users within the team he is part of or that he is a supervisor of.

Privileged Access IP Range

The *Privileged Access IP Range* privilege allows users (e.g., administrators) to be able to log in to the system from any IP address (e.g., a public place such as a coffee shop). Without this privilege, users can only log in from specific IP addresses.

Publish help

Publish help gives the user full access to configuring help screens.

View audit log

With the *View audit log* privilege, the user can view the audit log.

View usage data

The *View usage data* privilege allows the user to access to reports about usage of telecom carriers' resources via *Contact Center Administrator* > *Reports* > *Usage.*

BPO Client group

Listening to call recordings and view chat transcripts on services in reviewer role

With this privilege granted, the user may listen to call recordings and view chat transcripts of the services to which the user is assigned as a reviewer.

setRescheduleWindow

Allows you to reschedule outbound dialing retry time to be within a specific timeframe with the option to specify a time zone.

The reschedule window will only affect outbound campaigns when a non-final disposition is selected. The data is retained in Agent Desktop until changed or the interaction is completed.

Request

Syntax

```
setRescheduleWindow(numberToDial, fromTime, untilTime, timezoneName);
```

Parameters

Parameter	Data Type	Required/Optional	Description	Example
numberToDial	String	Required	The phone number to dial	"11234567"
fromTime	String	Required	The start of the reschedule timeframe in "YYYY-MM-DD HH24:MM:SS" format	"2019-09-12 15:30:00"

untilTime	String	Required	The end of the reschedule timeframe in “YYYY-MM-DD HH24:MM:SS” format (must be after the starting time)	"2019-09-13 15:30:00"
timezoneName	String	Optional	The name of the timezone; if omitted, the timezone will be assumed to be the record’s detected timezone	“America/Los_Angeles”

postVariable

This function enables a variable to be pushed to a scenario as if the Set Variable block is included; the variable is then available in scenarios and workflows.

When invoking the postVariable method for a variable that starts with *ActivityHistory*, Agent Desktop memorizes the value of the variable to post it in activity history (see the *Form Builder Reference Guide*, section How to Configure Activity History Forms for more information on mapping activity history values). If an activity history field was marked for export in campaign results, it will be possible to export it with campaign results. The data is retained in Agent Desktop until changed or the interaction is completed. If a form is displaying that data, the form is also updated to reflect the new value. If the data changes in the form, it changes the value to be submitted.

Syntax

```
postVariable(name, value);
```

Parameters

Parameter	Data Type	Description
name	String	The name of the desired variable
value	String	The resulting value of the variable

Report Templates

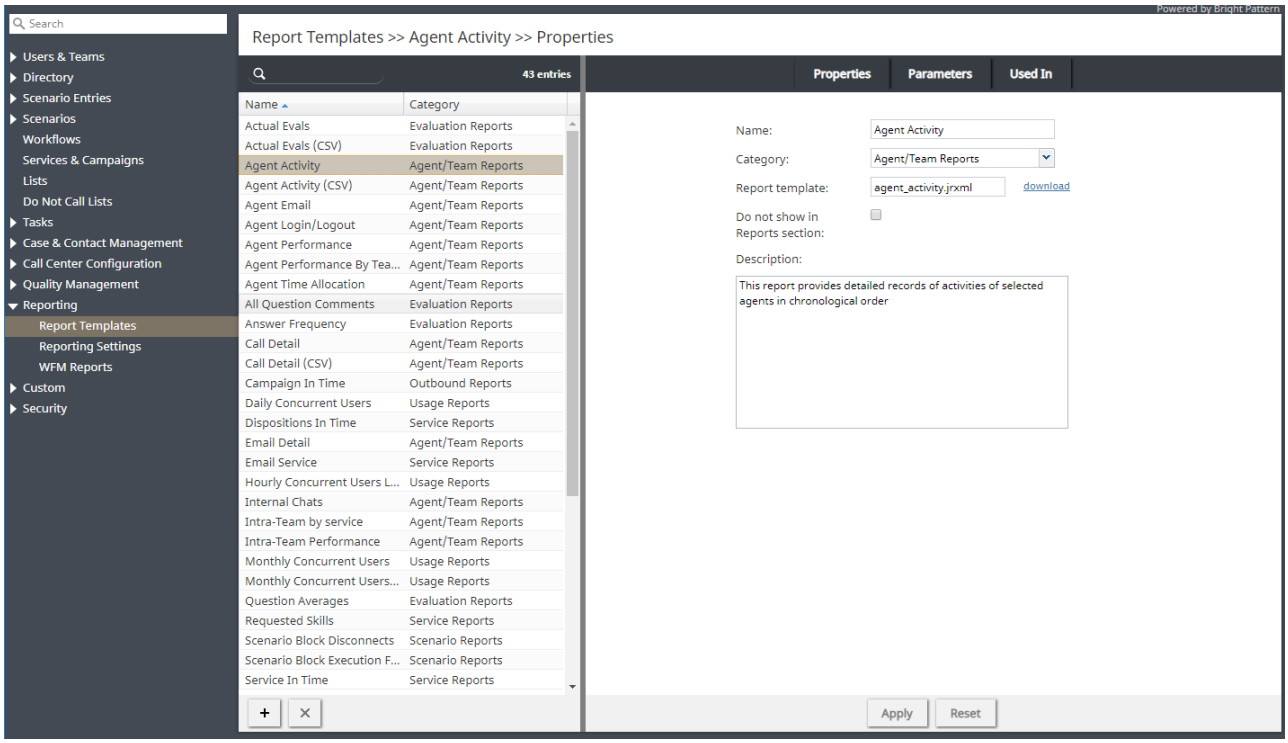
Bright Pattern Contact Center provides a number of reports for evaluating the performance of agents and agent teams as well as assessing the efficiency of contact center services and scenarios. These reports are developed using Jaspersoft reporting tools. They can be generated and viewed directly in the Contact Center Administrator application. For detailed information about the metrics provided in these reports, see the corresponding sections of the *Bright Pattern Contact Center Reporting Reference Guide*.

If these predefined reports do not completely cover the reporting needs of your contact center, you can create custom reports. To create such reports, refer to the detailed descriptions of the historical data that is collected and stored in the Bright Pattern Contact Center Reporting Database, which are found in the *Bright Pattern Contact Center Reporting Database Specification*.

Any SQL-based reporting application can be used to create, generate, and view custom reports. However, using the TIBCO Jaspersoft Studio application to create your custom reports enables you to (1) reuse the predefined report templates making modifications where necessary, and (2) generate and view such reports directly in the Contact Center Administrator application in the same way that you generate and view the predefined reports. You can find detailed instructions on how to configure Jaspersoft Studio for creating custom report templates in the *Custom Reporting Tutorial*.

Note: Jaspersoft has two different tools for report development, iReport Designer and Jaspersoft Studio. Only Jaspersoft Studio is supported as the tool for the creation of custom report templates for your Bright Pattern Contact Center solution.

To work with the predefined- and Jaspersoft Studio-based custom report templates, select the **Report Templates** option from the *Reporting* menu. Both the predefined and the previously uploaded custom report templates will appear in the list view. Click the button with the "+" sign to define and upload a new report template.

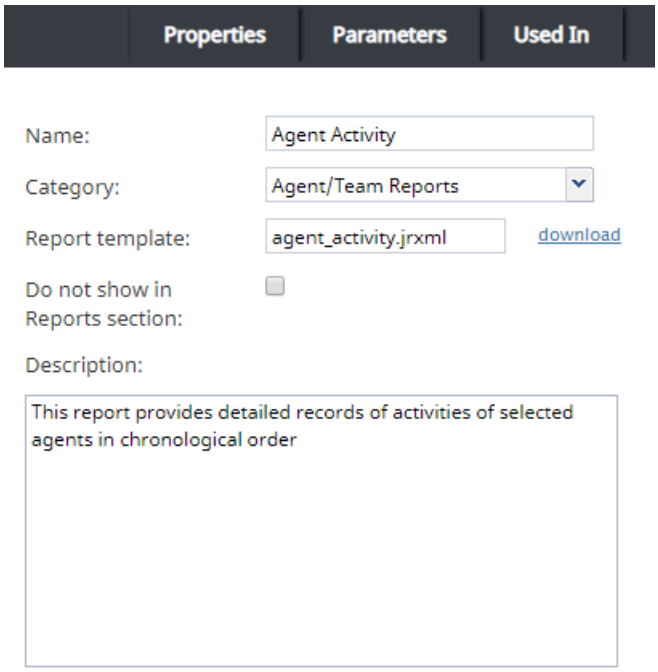


Reporting > Report Templates

Screen Properties

The *Report Templates* screen properties are organized into three tabs, and they are described as follows.

Properties tab



Properties tab

Name

Assign a name to this report template. The *Name* parameter is mandatory.

Category

Select the report category. The *Category* parameter is mandatory. If your custom report does not logically fit in any of the available categories, you can define a new category by selecting the **Manage categories** option.

Report template

Upload

To define a new report template, click **upload**.

Files that you upload must have a file extension of *.jrxml* or *.bpxml*.

JRXML report templates are created and modified in the TIBCO Jaspersoft Studio application. If your report is based on several *jrxml* files, they must be packaged into a zip file for upload, and the master file that links all other files into a single report template must have the suffix *_master*.

Download

To download a report template, click **download**.

Files that you download are available with either the *.jrxml* or *.bpxml* file extension. Only CSV reports have the *.bpxml* file extension. For more information on creating custom CSV reports in BPXML format, see the *Custom Reporting Tutorial*.

If you wish to create a new custom report via the modification of an existing template, you can export the desired template by selecting it from the list and clicking **download**. If the desired existing template consists of several files, they will be downloaded in a zip file, and the master file that links all other files into a single report template will have the suffix *_master*.

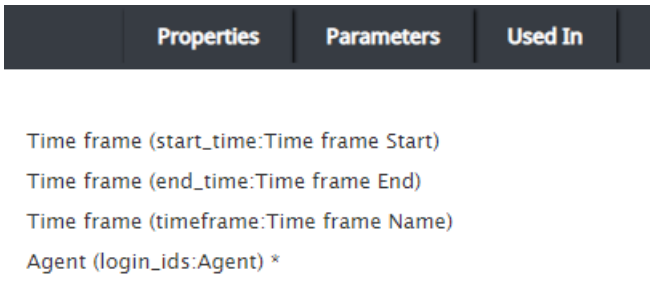
Do not show in Reports section

This property indicates whether this report shall appear in the menu of reports available for generating and viewing in the Contact Center Administrator application. You can select this option if the given report is only intended for scheduled generation and distribution. See section *Scheduled Reports* for more information.

Description

Use the *Description* field to provide additional information about this report (e.g., its main purpose and intended audience).

Parameters tab



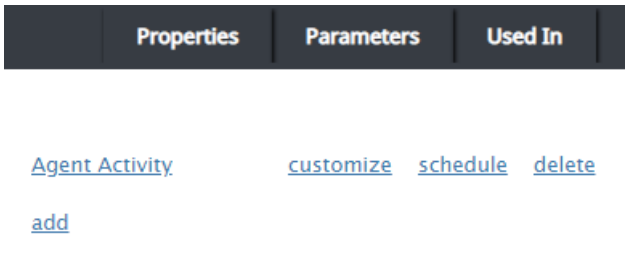
Parameters tab

List of report parameters

The *List of report parameters* must be specified for the generation of this report. These are read-only.

Used In tab

The *Used In* tab displays what reports a report template is being used in. Additionally, you may configure the following from this tab.



Used In tab

List of reports

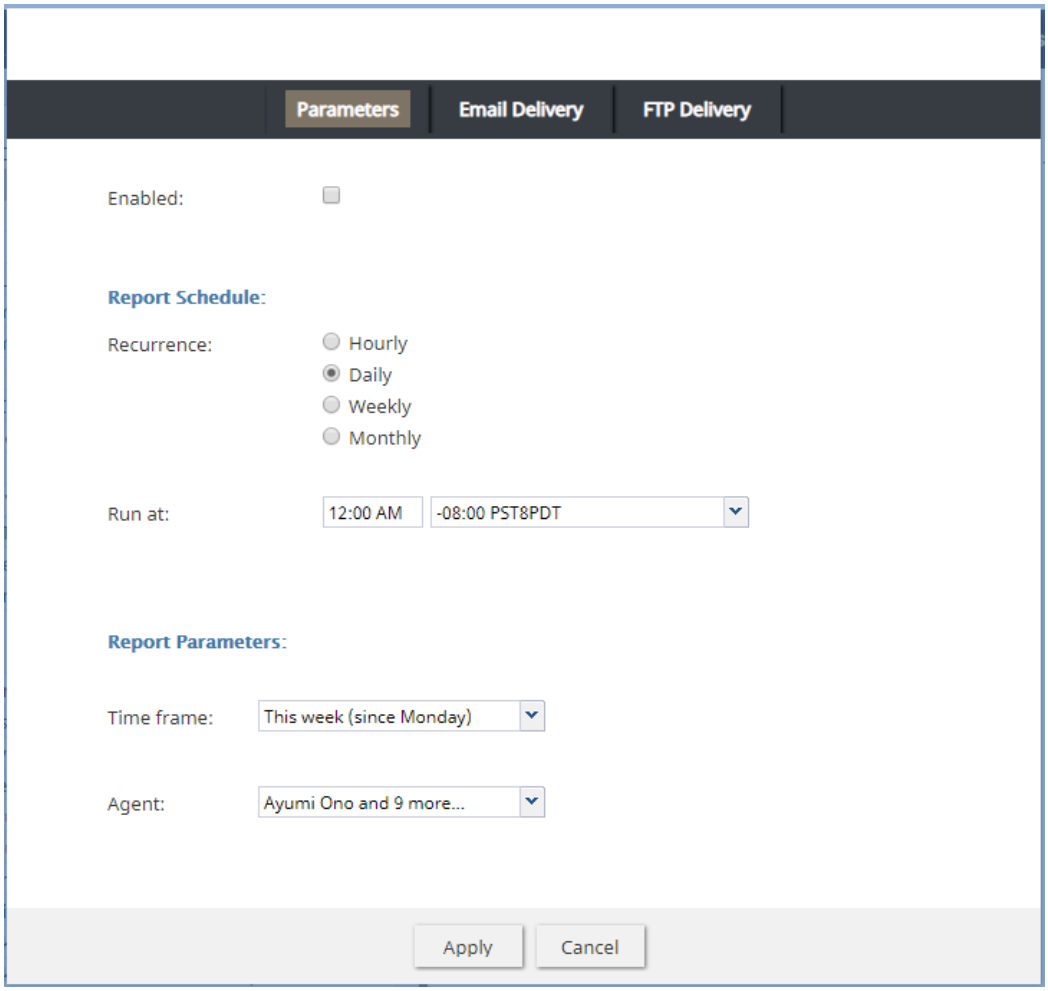
The *list of reports* displays the names of the reports that the report template is used in.

Customize

Selecting *customize* launches the Report Customizer application. From here, you may make changes to the report columns, including rearranging them, resizing them, deleting them, and so forth.

Schedule

When selected, *schedule* pops a window that allows you to configure specific dates and times your report will run, as well as delivery options.



Report scheduler

Parameters tab

When the **Enabled** option is selected, the *Parameters* tab allows you to configure both a report generation schedule (e.g., recurrence and *run at* time) and report generation parameters (e.g., a set time frame like "This week" and other details).

Email Delivery tab

When the **Deliver report via email** option is selected, the *Email Delivery* tab allows the system to automatically email scheduled reports; report formats include PDF, Excel, CSV, and text. Additionally, variables of the *$(varname)* format may be used in the *Subject* field and *Message* field. Note that in order for your email to be sent, you will need to configure SMTP settings.

FTP Delivery tab

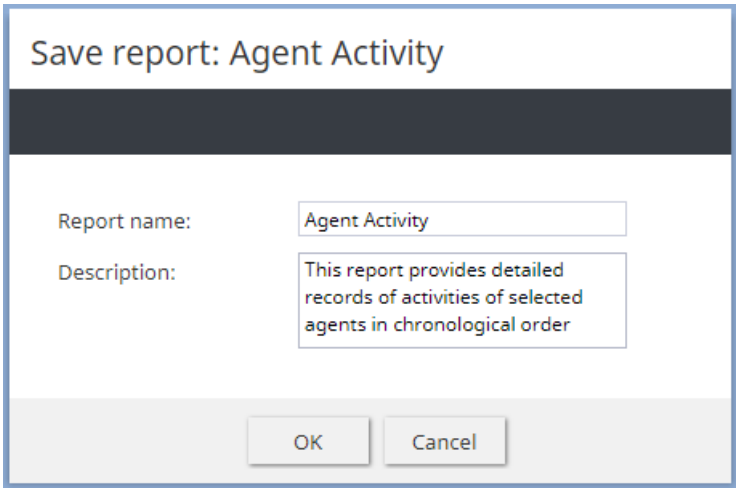
When the **Deliver report va FTP/SFTP** option is selected, the *FTP Delivery* tab allows the system to automatically deliver scheduled reports to your FTP/SFTP server; report formats include PDF, Excel, CSV, and text. Additionally, variables of the *$(varname)* format may be used in the *Destination folder and file name* field.

Delete

When selected, the *delete* option deletes the report associated with the report template. Note that a confirmation window will pop before the report is deleted.

Add

The *add* option allows you to create a new report from this report template. After clicking **add**, a dialog window will pop and you will name and describe the new report.



Create a new report from a report template

Known Issues and Workarounds

This page provides information about known issues for Bright Pattern Contact Center software.

Reports do not display properly in Firefox 67

Due to a JavaScript root name conflict between Google Web Toolkit (GWT) and Firefox, reports are not displaying in Firefox 67—running a report brings up a blank browser tab.

As a workaround to this issue, we recommend doing the following:

1. In Firefox, navigate to **about:config** to bring up preferences.
2. Search for preference **security.webauth.u2f**
3. Set the value to false by double-clicking on the preference.

Embedded Agent Desktop Widget in Safari

Due to recommended system changes that address cookie handling in Chrome 80, the Embedded Agent Desktop widget (i.e., iframe) will not work in the Safari web browser. This issue affects **only** customers who use integrated Bright Pattern Contact Center software in third-party applications (e.g., Salesforce, Zendesk, etc.). Currently, Apple is working on a fix for this issue. Our recommended workaround is to use a web browser other than Safari. Note that users may still access the regular Agent Desktop application on Safari.

Externally Linked Images in Jaspersoft Reports

Bright Pattern tightened the security addressing a recently discovered Jaspersoft reports vulnerability in 5.5.5. As a result Jaspersoft reports cannot use links to external URLs (e.g., links to custom logos). Bright Pattern suggests using embedded images in reports, if a custom logo is absolutely necessary.

Workaround for Integration With Multiple Salesforce Accounts

If your contact center requires multiple Salesforce integration accounts to be configured, it is likely that you will encounter issues when requesting access tokens for any integration account other than the initial one.

That is, if you have successfully configured one integration account, while completing *step 2* of the *Add Salesforce Integration Account in Bright Pattern* procedure for a subsequent account, when you reach the point where you click **Request token**, the login window that pops may appear with the URL of the initial Salesforce integration account.

Should you experience this issue, take the following steps:

1. After configuring the initial account, clear all cookies from your web browser. Note that this action will log you out of the Contact Center Administrator application.
2. Log back into the application and complete *step 1* and *step 2* of the procedure.
3. When you reach the point in *step 2* when you click the **Request token** button, a window will pop. Ensure that the URL in this window matches the *Url* configured in the basic properties for the subsequent account.

Note that this workaround applies to all versions of Salesforce (i.e., Classic, Lightning, and Service Cloud).

Windows Administrative Remote Assist Task Manager

Due to Windows Security features, agents may lose mouse and keyboard control over their Remote Assist sessions, but this will only occur when ALL of the following are true:

- Customer is using Windows, AND
- Customer is logged in as an admin, AND
- The Task Manager is opened on the customer's computer, AND
- The Task Manager window has a focus, AND
- The Remote Assist session is not elevated

No matter how the Task Manager is opened, this specific combination of events may cause the agent to lose keyboard and mouse control.

To work around this issue:

- Elevate the session, OR
- Ask your customer to close the Task Manager while speaking with them via phone or chat