TOSHIBA

Strata CIX

Supervisor Guide

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Introduction

This guide provides instructions for using the Strata Insight CIX and Insight CIX Plus Management Information System (MIS) for call centers.

Organization

This guide is organized as follows:

- **Chapter 1 – The Grand Tour** covers the basic requirements for Insight and Insight Plus. It also provides an overview of the toolbars.
- **Chapter 2 – Real Time Displays** explains how to create and edit status, statistics, graphical, wait time, and large character displays.
- **Chapter 3 – Reports** details how to create and edit report templates, reports, as well as how to filter, compile, print, import and export report data.
- **Chapter 4 – Wallboards** shows how to configure wallboards, set up schedules and messages.
- **Chapter 5 – Alarms** covers configuring alarms, displaying alarms, and explains the various colors and thresholds associated with specific alarms.
- **Glossary**

Conventions

Some of the following conventions are omitted in our manuals when they are not used.

Conventions	Description
Note	Elaborates specific items or references other information. Within some tables, general notes apply to the entire table and numbered notes apply to specific items.
Important!	*Calls attention to important instructions or information.*
"Type"	Indicates entry of a string of text.
Select	Instructs the user to choose a menu item or dialog box button on the screen.
	Represents an icon button on the feature toolbar. When you click on this icon, it performs the same function as the step.
Tilde (~)	Means "through." Example: 350 ~ 640 Hz frequency range.
See Figure 10	Grey words within the printed text denote cross-references. In the electronic version of this document (Strata Call Center Solutions CD-ROM or FYI Internet download), cross-references appear in blue hypertext.

Related Documents and Media

Note Some documents listed here may appear in different versions on the CD-ROM, FYI, or in print. To find the most current version, check the version/date in the Publication Information on the back of the document's title page.

The following documents and CD-ROMs can be used to reference further information about the Insight CIX.

- Strata CIX Call Center Solutions General Description
- Insight CIX inView Quick Reference Guide
- Insight CIX Installation Guide
- Insight CIX Sample Report Guide

CD-ROMs

- Strata CIX Call Center Solutions Application Software and Documentation Library for Strata ACD, Insight, OAISYS Net Server, and OAISYS Voice Assistant
- OAISYS includes software and documentation for OAISYS Chat, Call Router, and Net Phone

For authorized users, Internet site FYI (http://fyi.tsd.toshiba.com) contains all current Strata documentation and enables you to view, print, and download current publications.

The Grand Tour 1

Insight and Insight Plus is at the heart of a suite of products designed for use in formal or informal call center environments. Insight and Insight Plus (an enhanced version) consists of the folllowing:

- Insight MIS (see "Real Time Displays" on page 11)
- Wallboards
  - Hardware (see "Wallboards" on page 49)
  - Software (see *Inview Quick Reference Guide*)
- Insight Reporter (see "Reports" on page 25 and *Insight CIX Sample Report Guide*)
- Insight Configurator (see *Insight CIX Installation Manual*)

The offerings comprise two supervisor offerings (Insight and Insight Plus) and inView, a LAN-based package for agents or other staff members.

Both supervisor packages provide user defined real time management displays and user defined historical report templates.

Insight and Insight Plus can also be used to drive electronic, LED based wallboards.

Insight systems are Windows-based MIS software programs that work with PCs running Microsoft® Windows® 2000 Professional and XP Pro.

Insight Features

The basic ACD MIS is known as Insight. In addition to the previously described general features, Insight also has the following:

- Nine types of real time windows

- Four real time templates created using any number of windows

- Fifteen types of reports that cover a maximum period of one year

- Wallboards

- inView LAN-based displays

Insight Plus Features

As well as the general features described previously, Insight Plus provides the following:

- Sixteen different types of real time windows

- Any number of real time templates

- Thirty-four types of reports that cover a maximum period of one year

- Ability to export reports in comma delimited format to spreadsheet packages like Excel or Lotus® 1-2-3®, where information can be displayed in graphical format.

- The Insight Plus database can be exported.

- Wallboards

- Sub-supervisors

Insight MIS Real Time Client

Menu Bar

The Insight Menu Bar provides access to all of its features through the Insight MIS program. The software is presented in a Windows format, which is easy to use. The following shows the Menu Bar items.

Menu Bar

File	New Real Time Window Insight Reporter Insight Configurator Insight Alarms Exit
View	Toolbar Status Bar Favorite Layout Bar
Setup	Alarms
Layout	Snap to Grid Show Grid Grid Configuration New Copy Save Delete
Messaging	Send Message
Wallboards	Configure Driver
Windows	
Help	
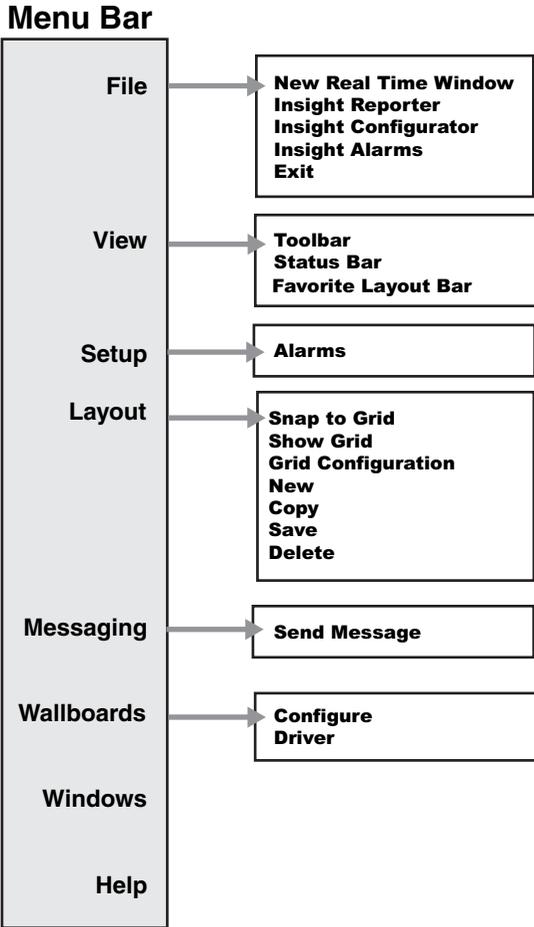
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Toolbar

The MIS toolbar (shown below) is a component of the real time client. The icons give you quick access to Insight commands that are also available through the Menu Bar selections.
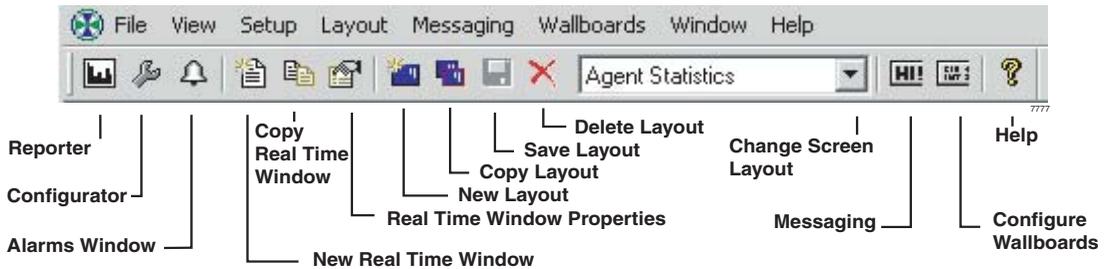
Icon	Menu Option	Description
	New Real Time Window	Enables the user to add a new real tim window to the screen layout. See Chapter 2 – Real Time Displays for details.
	Reporter	Opens the Reporting Package. See Chapter 3 – Reports and *Insight CIX Sample Report Guide* for details.
	Alarms	The user will pop up the Alarms list for the taskbar and inView. See Chapter 5 – Alarms for details.
	Messaging	Wallboard messages can be scheduled to appear for specific durations. See "Create Wallboard Message" and "Queue Messages" on page 57 for more details.

Icon	Menu Option	Description
	Configure Wallboards	Wallboards can be configured to provide real time performance statistics and motivational text to call center groups. Insight supports up to six wallboards connected to each supervisor position. See Chapter 4 – Wallboards for details.
	Copy Real Time Window	Enables the user to copy an existing real time window and add it to the screen layout.
	Real Time Window Properties	Configure status windows for individual agent groups. Groups are created in the Insight Configurator (see *Insight CIX Installation Guide*).
	New Layout	Allows the user to create a blank screen and add new real time windows using the New Real Time Window icon.
	Copy Layout	Copies a existing screen layout and enables the user to give it a name.
	Save	Saves any changes made in the real time screen layout.
	Delete	Deletes an existing screen template.
	Configurator	Enables the user to access the Configurator. See *Insight CIX Installation Guide*.

Wallboards

Wallboards are units that contain lights that display messages to a large viewing area. They can be configured by Insight MIS for Insight and Insight Plus to provide real time performance statistics and motivational text to call center groups.

Wallboards always include one or more of the following items:

- Label – Displays fixed text used to describe a parameter.
- Message – Displays a scrolling message.
- Parameter – Displays a specific real time data parameter for a specific device or device group.

These are combined to form templates and then templates are added to a schedule which can then be applied to a specific wallboard.

Insight and Insight Plus support up to six wallboards connected to each supervisor position. Insight provides a choice of 45 parameters to display; Insight Plus provides over 700 choices. A supervisor can send text messages as well. Audible alarms can also be added to alert staff to certain alarm states or messages.

The Insight product line also includes a PC-based LAN application called inView that displays agent group statistics and agent status displays on a PC monitor. See the *Insight CIX inView Quick Reference Guide* for more information.

Reports

While Insight is running, all monitored telephone traffic is logged to the hard disk for analysis by the Insight Reporter. To simplify the process of reporting, Insight Reporter provides the concept of a "report template" to define the contents of a report. You can create any number of report templates.

A report template is a series of report items used collectively to achieve a desired result. For example, a weekly report for Inside Sales may include a Line Traffic Report, an Agent Group Traffic Report, or Call Distribution Report as well as any of the others available.

Reports can be collated with respect to any number of definable shifts. For example, if two sets of agents man the call center at different times during each day of the week, then Insight Reporter can generate reports for each shift as necessary. Once collated you can either view the report on screen or send a copy to the printer.

Toolbar

The Reporter toolbar (shown below) is a component of the Insight Reporter program. The icons give you quick access to Insight commands that are also available through the Menu bar selections.
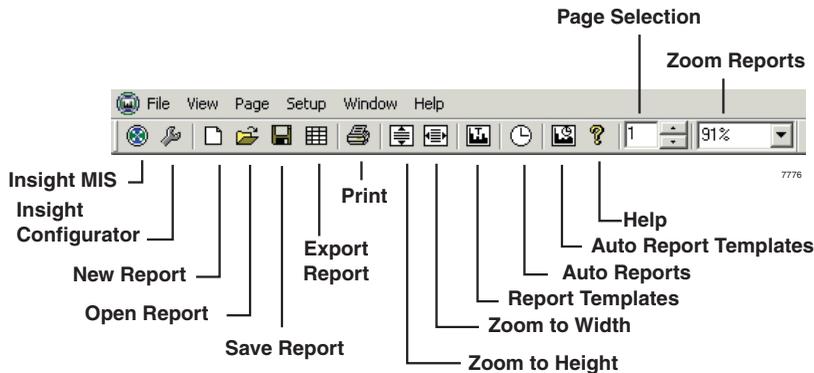
Table 4 below shows the available reports and the individual or group that can access them.

Table 1   Insight Reports

Report	Agents	Extensions	Lines	DIDs	Agt Grp	Ext. Grp	Line Grp	DID Grp	Acct Code	Queue	Queue Grp	Agt Spr Grp	Ext Spr Grp	Line Spr Grp	DID Spr Grp
Event	✔	✔					✔								
Traffic	X	✔	✔	✔	✔	✔	X	X		X	X				
Traffic Profile	✔	✔		X	✔	✔	X	X		X	X				
Utilization	X	✔													
Utilization Profile	X	✔													
Contention					✔	✔	✔								
Contention Profile												✔	✔	✔	
Wait Time Distribution							✔							✔	✔
Wrap-up Time Distribution	✔				✔										
Call Time Distribution					✔	✔	✔	✔				✔	✔	✔	✔
Account Code									X						
Forecast					✔		✔								
Forecast Profile					✔		✔								

X *= Appears on Insight and Insight Plus Reports*

✔ *= Appears on Insight Plus Report Only*

Configurator

The programming in the Configurator is a key element for creating reports. The Configurator must mirror the telephone system configuration so that data can be collected for each device used in Strata, including Lines, Agents, Extensions, Queues and DID Numbers.

The configurations start with a single supervisory position. System option modules can be added, including:

• External, wall-mounted electronic reader boards for displaying information to a group.
• inView LAN-based PC displays provide information to Agents or Supervisory personnel. (See the *Insight CIX inView Quick Reference Guide* for feature instructions.)
• Fully capable sub-supervisors, that allow individual sub-supervisors to control the reports and displays needed for their group(s).

The configurations can include database backup capabilities, including collecting data and acting as an additional resource for generating reports. For instance, critical databases can be stored on a reliable server, such as the server used for backing up the organization's information.

The Configurator window (shown at right) enables you to create and edit a number of display windows and miscellaneous settings. The window consists of five tabs, each tab having three functions called Edit (individual item), Edit Groups, and Edit Super Groups. Toshiba recommends configuring the items in this order:

1. Agents – Once the common definitions are set, you can make refinements for specific agents.
2. Agent Groups – By creating the Agent groups first, you set definitions that apply to the entire groups.
3. Agent Super Groups – After the Agent groups and Agents are configured, you can create a larger group by configuring a Super Group.

Real Time Displays 2
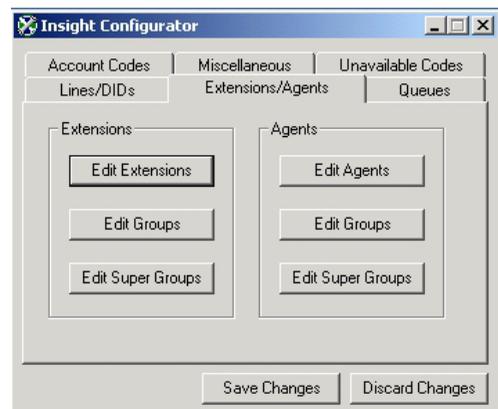
This chapter covers setting up and interpreting Real Time Displays provided by Insight MIS. These displays provide immediate feedback on the activity of your call center; they update every second. You can create custom templates using a variety of display windows. Standardized colors indicate various alarm states and status conditions.

Real Time Displays are configured into templates. A template is a set of display windows that can be viewed directly on the screen. Insight supports four user definable templates, while the Insight Plus has an unlimited number of templates.

Create Real Time Displays

Real time displays are used to monitor activity in the call center during working hours. You will want to determine how many and what type of the following displays you would initially like to see. Refer to the table below for display types.

The following windows are available both in Insight and Insight Plus:

- Agent Group Statistics Window
- Agent Status Window
- DID Group Statistics
- Extension Group Statistics
- Extension Status Window
- Large Character Window (40– Insight, 700 – Insight Plus)
- Line Group Statistics Window
- Line Status Window

- Queue Status Window

The following windows are available in only Insight Plus:

- Agent Statistics
- Calls in Queue Graph
- DID Statistics
- Extension Statistics
- Line Statistics
- Queue Group Statistics
- Queue Statistics
- Waiting Time

Real Time templates are saved in a file called misw.ini which can be found in c:\Insight\ToshibaCTX\US on the local PC.

This method of configuration allows each client/supervisor to create templates which are unique to their own personal needs.

To replicate these templates, simply copy the file from PC to PC.

Composite Screen Layout

The following figure shows an example of a composite layout with various real time display windows. When a layout like this one is saved, you can easily pull up the same windows by selecting this layout.

Pull-down menu of Display templates

Agent Status All Sales

Agent Status All Non-Sales

Agent Group Statistics All Agents

Title

Large Character Title

Large Character Display

Agent Statistics Display
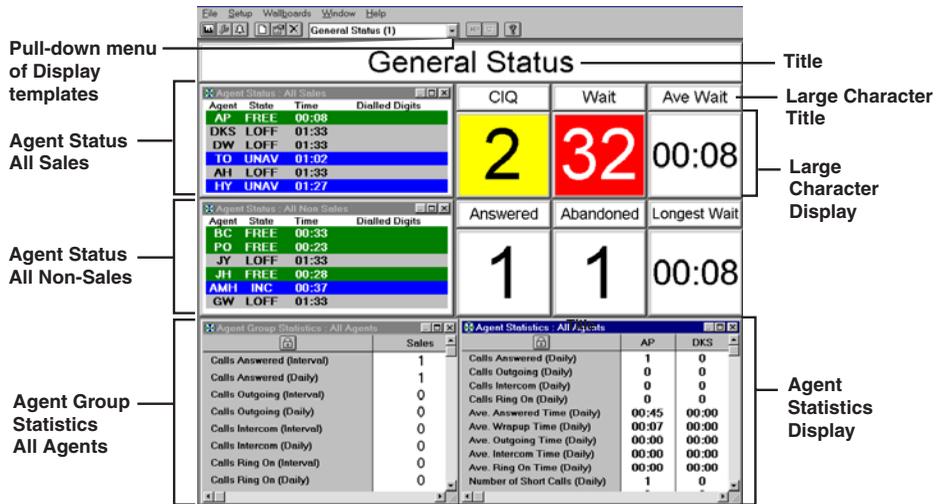
Indication Colors

On a color monitor, the above windows will show the status of agents and/or devices. Insight uses five colors for various alarms and call states.

Color	Meaning	Notes
Red	Alarm	Waiting time threshold exceeded, etc.
Yellow	Ringing	Device or line is ringing
Blue	Busy	Agent on call, in wrap up, etc.
Green	Idle	Agent is idle. Line is free.
Light Gray	Device logged off	
Dark Gray	Unavailable	Agent is logged in but not taking calls.

The call state column will give a text-based indication of the state. Dark gray (unavailable) state text descriptions are user configurable via the Configurator while the rest are cell fixed.

The following procedures describe how to create and configure Agent Displays. The procedures for each type of display are the same. For instance, the procedure to create Agent Status Displays is the same for Extension and Line Displays.

Agent Status Window

This window shows the current status of each agent in the selected group. Short descriptions of each agent's status appears with a background color that represents various call and/or alarm states. The amount of time that each agent has been in the current state is shown. Additional information can be displayed by selecting those parameters within the Configuration window.

Create New Agent Status Window

1. From the Window menu, click on the New Real Time Window icon.

2. From the New Real Time Window screen, select Agent Status, click OK.

Configure Agent Status Window

1. Right click on the Agent Status window and select Properties

   ...or click the Real Time Window Properties icon.

2. From Properties for the Agent Status window, enter/select:

    -   Agent Group

    -   Agent information to be shown

    -   Extension information

    -   Connected to information

    -   Devices to display

    -   (Optional) Check Show Extensions in Preference to Agent.

        This option always displays the name/number of the extension an agent is connected to, even if the agent is logged on at another extension. If unchecked, the agent number/name displays.

    -   (Optional) Check Show Line in Preference to DID.

        When checked, this displays the number/name of the line that the agent is connected to, even if there is a DID number associated with the line. If unchecked, the DID number/name displays.

    -   (Optional) Check Dialed Digits.

        Check this box to display dialed digits for outgoing calls or Automatic Number Identification (ANI) or Caller ID (CLID) digits for incoming calls.

    -   (Optional) Check the Bevel option if you want to have a border surrounding each row.

    -   (Optional) Check the Show Active Agents Only option if you want to only see logged on agents.

    -   Select Rows if you wish to see the agents displayed row by row with a vertical scroll bar provided to bring non-visible agents into view.

    -   Select Columns if you wish to see the agents displayed row-by-row in multiple columns if necessary. In this case, a horizontal scroll bar is used to bring non-visible columns into view.

3. Click OK when done.

4. The header and content font can also be modified by right-clicking on the Agent Status window and selecting the appropriate option for the list.

Real Time Statistics

Statistics can be presented as:

- **Interval Call Statistics** in which you set the length of time (from 1~1440 minutes) that the calculations should cover.
- **Daily Call Statistics** are based on shift schedules. The counter is reset to zero at the beginning of each shift.

Real Time Alarm Thresholds are Real Time Statistics added in the Configurator.

Set Real Time Statistics

Access Real Time Statistics to configure how the interval call statistics and the daily call statistics operate. This is a list of the shifts available to use to control the daily call statistics. See also Configuring real time call statistics.

1. From the Menu bar, click File > Insight Configurator > Miscellaneous tab > Security Groups.

   ...or click the Configurator icon.

2. Highlight a security group and click Edit. The Security Group Configuration screen displays.

3. Click Real Time Statistics. The Real Time Statistics screen displays (shown right).
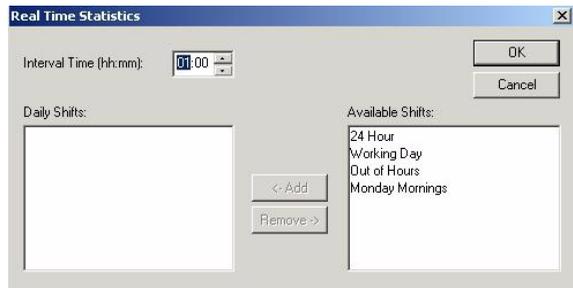
4. Add new shifts by highlighting a shift from the *Available Shift* field, then click Add
   ...or remove shifts by highlighting the shift(s), then click Remove.

Note Daily Shifts lists the shifts that are to be used in the Real Time Displays. These can be used to provide automatic start and ending times.

Agent Statistics

Statistics based on parameters and time periods that you select will be displayed in the Agent Statistics Window.

Create New Agent Statistics Window

1. From the Window menu, click on the New Real Time Window icon. The New Real Time Window screen displays.

2. Select Agent Statistics, click OK. The agent statistics display (example shown right).

Lock	AP	DKS	DW	BC
ACD Calls Answered (Daily)	197	197	262	196
ACD Calls Outgoing (Daily)	0	0	0	0
ACD Avg. Answered Time (Daily)	01:32	01:23	01:38	01:17
ACD Avg. Wrapup Time (Daily)	00:05	00:07	00:09	00:07
ACD Avg. Outgoing Time (Daily)	00:00	00:00	00:00	00:00
ACD Avg. RNA Time (Daily)	00:00	00:00	00:00	00:00
ACD Avg. Intercom Time (Daily)	00:00	00:00	00:00	00:00
ACD Number of Short Calls (Daily)	66	0	0	65
ACD Number of Long Calls (Daily)	66	0	0	0
ACD G.O.S. (Daily)	33.0	100.0	100.0	66.8
% ACD Incoming Call Time (Daily)	38.7	39.1	61.2	26.6
% ACD Outgoing Call Time (Daily)	0.0	0.0	0.0	0.0
% ACD Total Call Time (Daily)	38.7	39.1	61.2	26.6

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3. To change the content or header text, right-click and choose the appropriate item for the list.

Configure Agent Statistics Window

1. Right click on the
   Agent Statistics
   window and select
   Properties. The
   Properties for the
   Agent Statistics
   Window screen
   displays (shown
   right).
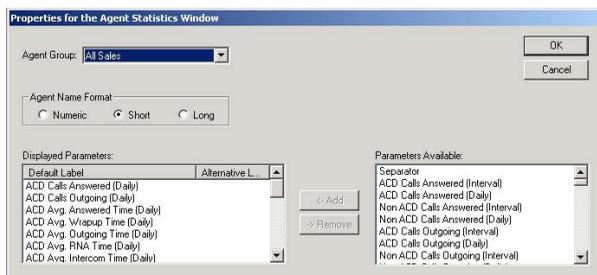
2. From the Properties for Agent Group Statistics window, select an Agent
   Group from the drop-down menu.

3. Check an Agent Name Format (numeric, short, long).

4. Select Displayed Parameters by highlighting a parameter from the Available
   Parameter list and click Add

   ...or highlight a parameter in the Displayed Parameter list and click Remove.

5. Highlight a parameter and click Alternative Label to rename it.

6. Click OK.

7. (Optional) From the Agent Statistics window, click the word Lock at the top
   of the screen to toggle the Agent Statistics window between two display
   modes.

   Lock On: Displays the single agent that was left most in the window before
   the lock button was selected. The horizontal scroll bar is removed.

   Lock Off: Displays all the agents within the selected agent group and
   provides a scroll bar if there are more agents than can fit in the window.

Wait Time Graph

This is one of the real time data windows that can be added to the Insight real time client template.

Each wait time bar graph window shows the wait time for the longest waiting call currently queued on a series of Queue and DID Groups and Line, DID, Extension and Agent Super Groups.

The graph uses status colors to provide an at-a-glance indication of the status of the longest wait time in each queue. If the longest wait time in a given queue exceeds the wait time alarm limit for that queue, then the corresponding bar turns red to show how much over the alarm threshold the call has been waiting.

Create Wait Time Graph Window

1. Click the New Real Time Window icon.

2. Select Waiting Time Graph from the drop-down list and click OK The bar graph displays (shown right).

   The bar graph can be orientated horizontally or vertically. It can also be set to auto-scale proportionally for the alarm limits configured for the displayed parameters.
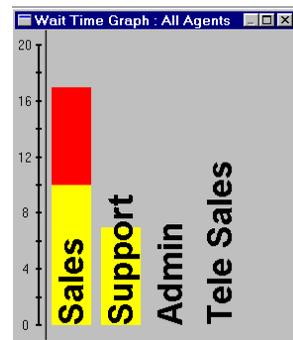
Change Wait Time Graph Properties

1. Right click on the Wait Time Graph that you wish to change.

2. Select the desired Wait Time Graph, then right click on the screen and choose Properties.

   Properties for the Wait Time Graph Window

   Device Type: Line Super Group

   Device Name: All Line Groups

   OK

   Cancel

   Bar Layout
   - Horizontal
   - Vertical
   - Width: 30
   - Separation: 10
   - Text in Bar

   Maximum Scale Value
   - Autoscale 20 secs

   Scale Position
   - Left
   - Right

   Include Call Types
   - ACD
   - Non ACD
   - Both

   6813
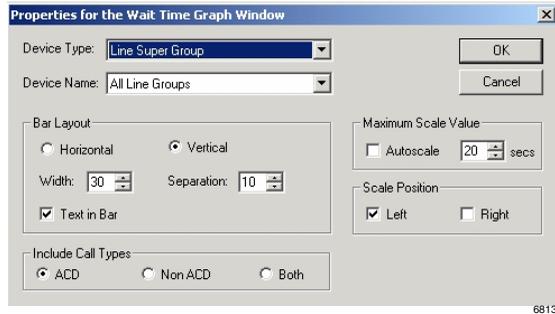
3. Select the Name of the Device whose members you wish to monitor.

   For example, if you select DID Group, you can monitor the DID numbers belonging to the selected group. Whereas, if you choose DID Super Group you can monitor DID Groups within the selected Super Group.

4. Select the graph orientation (horizontal or vertical).

5. Enter a bar Width (in pixels).

6. Enter a bar Separation (spacing between bars in pixels).

7. Check the Text In Bar box to display text labels within the bars.

   If you choose text in bar, the label size is governed by the bar size. If you choose text outside the bar, the label size is governed by the bar spacing.

8. Either check the Autoscale box or enter the maximum number of calls you wish the queue graph to display.

9. Choose the axis position (Top/Left, Bottom/Right, or both).

10. Click OK.

# Calls in Queue Graph (Insight Plus Only)

Each Call in Queue Graph window displays bar graphs of the number of calls currently queued on a series of queue and DID groups, and line, DID, extension and agent super groups. This graph displays real time data and can be placed in the composite real time display area (template).

The graph uses status colors so that queue status can be determined at a glance. If too many calls are waiting to be answered in a given queue (as defined by the calls waiting alarm limit for that queue), the corresponding bar turns red.

Creating Calls in Queue Graph

1. Click the New Real Time Window icon. The New Real Time Window displays.

2. Select Calls In Queue Graph from the drop-down list.

3. Click OK. You can configure the contents of this window to adjust the size and position of the window.
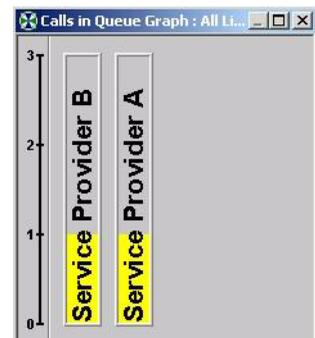
Configuring Calls in Queue Graph

You can configure the Calls in Queue Graph properties: orient the bar horizontally or vertically, set the bar width, bar separation, set text in the bar, and scale the bar.

1. Select the New Real Time Window icon. The New Real Time Window displays.

2. From the New Real Time window, select Calls in Queue Graph from the drop-down list and click OK.

3. Right click on the Calls in Queue Graph Window that you wish to configure and select Properties.
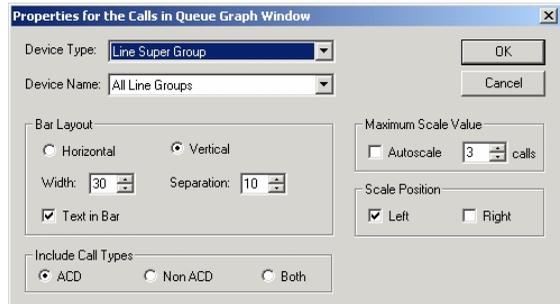
4. From the Properties for the Calls in Queue Window, select the Name of the Device whose members you wish to monitor.

   For example, if you select DID Group, you can monitor the DID numbers belonging to the selected group. Whereas, if you choose DID Super Group you can monitor DID Groups within the selected Super Group.

5. Select the graph orientation (horizontal or vertical).

6. Enter a bar Width (in pixels).

7. Enter a bar Separation (spacing between bars in pixels).

8. Check the Text In Bar box to display text labels within the bars.

   If you choose text in bar, the label size is governed by the bar size. If you choose text outside the bar, the label size is governed by the bar spacing.

9. Either check the Autoscale box or enter the maximum number of calls you wish the queue graph to display.

10. Choose the axis position (Top/Left, Bottom/Right, or both).

11. Click OK.

Large Character Window

You can create large character windows that display a single parameter for a device or group of devices. These windows can display real time status information, such as the number of calls waiting to be answered or call statistics information, such as the average call wait time. Real time status data is shown with the correct background status color. And, both interval and daily call statistics are supported.

Create Large Character Window

1. From the Window menu, click on the New Real Time Window icon.

2. In the New Real Time Window box, select Large Character, click OK. A large character window appears.

Configure Large Character Window

1. Right click on the large character window that you wish to configure and select Properties.
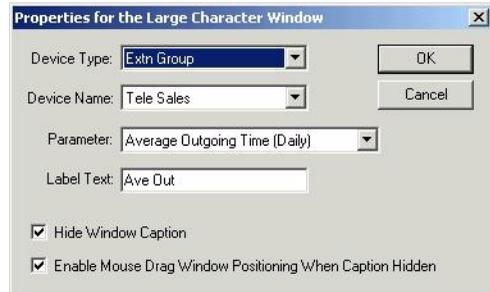
2. From the Properties for Large Character Window, enter or select:

   • Device Type – Chose the Line, DID, Extension, Agent or Queue, plus groups of these devices.

   • Device Name – based on the configured names of the device type selected.

   • Parameter

   • Label Text – Enables an integrated text box to indicate the parameter. A default is suggested but it can be user configured.

- Hide Window Caption (Optional) – removes the windows title used for the display.

- Enable Mouse Drag Window Positioning When Caption Hidden (Optional) – Enables you to move the large character window when the window caption is hidden.

3. Click OK when done.

Duplicate Large Character Window

1. Click on the Large Character window you wish to duplicate (sample shown at right).

2. Click the New Real Time Window icon and the New Real Time window displays with the correct selection already highlighted.

3. Click OK.

Notes

- This is a good technique for creating windows with the same size dimensions for a uniform display appearance.

- To change the elements of the duplicate screen, right click the window and select Properties.

...or click on the Copy Real Time Window icon and the window will be duplicated and can then be edited.

Alarms

Real Time alarm thresholds can be configured to give audible and visual indication of a situation that needs management intervention. See Chapter 5 – Alarms for details.

Reports 3

This chapter provides an in-depth look at the Insight Reporter. The Reporter program enables you to collate, view, and print historical reports. This chapter explains how to create report templates and how to interpret the report data. Also included are instructions for Insight Plus, which enables exporting data that can be imported into spreadsheet programs, such as Microsoft Excel®.

Report Concepts and Terminology

Understanding the key concepts and terminology used with the Reporter is vital to understanding the product. The following paragraphs explain these key concepts and terms. Also refer to *Insight CIX Sample Report Guide.*

Devices

Insight refers to lines, DIDs, queues, extensions, agents and account codes as devices. Users can create "groups" and "super groups" of devices. A group is simply a collection of devices and a super group is a group of groups. Insight Reporter reports on:

• Individual devices

• Groups

• Super Groups

To ensure the accuracy of the reports it is vital that the configuration of the telephone system is reflected in the programming of Insight. The devices are configured in the Configurator. See Table 2 for more information.

Table 2   Configurator Terms

Lines	In the context of Insight, a line represents either one of your external trunks or Tie lines connected to the Strata being monitored. Each line can handle only one telephone call at any one time. These calls are denoted as incoming calls because the call was originated outside the switch. Strata does not report real time status of outgoing calls placed over the monitored lines.
DNIS/DIDs	A Dialed Number Identification Service (DNIS) or Direct Inward Dial (DID) number is a dynamic numeric attribute assigned to a line on an incoming call. A DNIS/DID call can be routed to groups of extensions/agents or to an individual extension/agents depending how the call routing software within the Strata has been programmed. If configured correctly, Insight can monitor in real time and historically the activity of inbound calls associated with DNIS/DID numbers.
Queues	A Strata extension that provides a holding position (queue) for calls waiting for an available agent.
Extensions	An extension is the physical telephone handset where an agent can receive incoming calls, make outgoing calls or handle other forms of internal telephony traffic. Within the Strata systems, an extension is reported like an Agent. Thus the reports available for Extensions look very similar to those reported for an Agent except an Extension does not have the ability to log in or out.
Agents	An agent is the telephone operative who handles calls at an extension. Agents are identified by an Agent ID Code they use at the extension to enable call center telephony routing facilities within the switch. The Agent ID must uniquely identify the agent for Insight to give meaningful statistics concerning the activity of individual agents.
Account Codes	While on a call, agents can enter account codes that describe the nature of the call. Up to 15 account code digits can be entered, but Strata only reports the first two digits to Insight for reporting. The Strata allows up to 100 account codes to be entered and up to 20 account codes can be entered per call. Insight Reporter provides analysis of account code usage.

Shifts

Reports are compiled based upon shifts that are defined in the Configurator. These are used to filter the collected data to those times the user is interested. Real working shifts are used to create reports; however, shifts can also be used to determine what happens outside normal working hours, or certain days of the week, or just during certain hours (e.g., lunchtimes). For example, you can create a report over a six-month period that only reports the activity on Mondays.

Types of Reports

This section defines the types of reports available for the user. The terms used on the reports are explained in the Glossary.

Any number of report templates can be created and stored for later use. The contents of these templates are stored in a file called misreptr.ini which can be found in C:\Insight\ToshibaCTX\US on the local PC.

This method of configuration allows each client/supervisor to create templates which are unique to their own personal needs.

To replicate these templates, simply copy the file from PC to PC.

The following reports are available both in Insight and Insight Plus:

- Account Code Report
- Agent Group Traffic Report
- Agent Traffic Report
- Agent Utilization Profile Report
- Agent Utilization Report
- DID Group Traffic Profile Report
- DID Group Traffic Report
- Line Group Traffic Profile Report
- Line Group Traffic Report
- Queue Super Group Traffic Report
- Queue Group Traffic Profile Report
- Queue Group Traffic Report
- Queue Traffic Profile Report
- Queue Traffic Report

The following reports are only available in Insight Plus:

- Agent Event Report
- Agent Group Traffic Profile Report
- Agent Traffic Profile Report
- Contention Profile Report
- Contention Report
- DID Traffic Profile Report
- DID Traffic Report
- Extension Event Report
- Extension Group Traffic Profile Report
- Extension Group Traffic Report
- Extension Traffic Profile Report
- Extensions Utilization Profile Report
- Extension Utilization Report
- Forecasting Profile Report
- Forecasting Report
- Line Group Event Report
- Line Traffic Reports
- Wrap Time Distribution Report
- Call Time Distribution Report

Note You cannot Save reports or Export Data in Insight, only in Insight Plus.

Filters

The standard items that make up a report template tend to analyze your call center from one point of view only. For example, consider the DID Traffic Report and the Agent Traffic Report. These two reports analyze DID traffic and the associated agent traffic in isolation.

What if your call center is set up to route a series of DID numbers to the same group of agents? To obtain the performance of each agent on a per DID basis you need to attach report filters to the report items. In this example you could either create a series of DID traffic reports, each filtered to a different agent, or you could create a series of agent traffic reports each filtered to a different DID number.

A report filter is made up of a logical combination of filter elements. Each report item within a report template can have a different report filter attached to it if necessary.

A typical report using filters is an Abandoned Call Report. Abandoned Calls are shown in a Line or Line Group Report. Adding a filter for one or more Queues, show Abandoned Calls for that group(s). Table 3 shows the filter elements that are supported.

Note Filters can only be applied to the opposite end of the call path. For example, if an agent side report is being used valid filters would include Lines, DIDs, Queues, Dialed Digits and Account Codes but not Agents.

Table 3   Report Filters

Filter	Only accepts calls that were:
Line	Connected to a specific line.
DID	Associated with a specific DID number.
Queue	Device in the switch that the ACD software uses to route calls correctly.
Extension	Connected to a specific extension.
Logged on Ext.	Taken by an agent logged on at the specified extension.
Agent	Connected to a specific agent.
Account Code	Attached to a specific account code
Line Group	Connected to lines within a specified line group.

Table 3   Report Filters *(continued)*

Filter	Only accepts calls that were:
DID Group	Associated with DID numbers within a specified DID group.
Queue Group	Collection of queues monitored by the Insight MIS. Queues can belong to multiple queue groups if necessary. For each queue configured in the system you can make one of the groups that it belongs to its default group.
Extension Group	Connected to extensions within a specified extension group.
Logged on Ext. Grp	Taken by an agent logged on at an extension in the specified extension group.
Agent Group	Connected to agents within a specified agent group.
Account Code Grp	Attached to an account code within a specified account code group.
Ext. Queue Grp	Inbound and finally queued to a specific extension group corresponding to the Strata (EG501 ~ EG516).
Queue	Inbound that ended up on a specific queue.
Dialed Digits	Had inbound/outbound dialed digits that match a specified string. **Note** The character * may be used at any point to denote that the filter will accept dialed digit strings which are identical up to that point but differ afterwards.

Templates

Individual reports are grouped together to form a template. Templates are created by the user to provide relevant information for the selected devices to be monitored. Report items are added to a template to create all the information desired. These report items can also be configured by the user to include or exclude certain event or traffic types. Once a report template is created, a report for a given time period can be created by selecting the template, work shift, starting time, and ending time for the report.

Keep in mind that Event Reports are highly detailed and therefore it is unlikely that you would want to run this report over long periods of time. Similarly, Profile Reports that are suitable for daily use (say with hourly resolution) would not make sense if the report were being compiled over a six-month time frame. This being the case you will be advised to create many templates all designed for specific use and each containing appropriate report items.

Scheduling

Once the Templates have been made, the final step is to make a schedule to create and print the information. This scheduling is totally optional for the user.

The user can schedule report collation only, collate and print or collate, print and then close after printing. Insight Plus users can also schedule Export and Save.

Note File names remain the same after each automated Export or Save process so, unless the reports previously Exported or Saved, are moved, they are overwritten.

The Scheduling process is client based and so the client PC and Reporter application must be running for the process to be carried out.

Reports

Having established the type of report you need, use this section to help chose exactly the right report for your needs. This section describes what kind of reports are available. Actual reports are explained in *Insight CIX Sample Report Guide.*

Event Reports

There are three types of event reports, each recording all events that occur on the specified device (agent, extension or line group). Events are caused by the device, such as an agent, receiving an incoming call, accepting a call, dialing an intercom or outgoing call etc.

Agent or extension reports show exactly what an individual device has been doing over the period by examining all events caused by the device's activities. The report is presented in a call event per row format. Pagination of the report occurs if either there are too many call events to fit in the height of a page or there are too many statistics parameters to fit in the width of a page.

A line group event report provides an event/call trace for a selected line group. You can select the call types in which you are interested, for example, incoming, outgoing or abandoned calls. For example to see a list of all abandoned calls the call center experienced, compile a line group event report for all lines, selecting abandoned calls only.

This report can be useful in finding out the Calling Line Identity (CLID) of the customers who abandoned so their calls may be returned. The report is presented in a call event per row format. Pagination of the report occurs if either there are too many call events to fit in the height of a page or there are too many statistics parameters to fit in the width of a page.

Traffic Reports for Agents or Extensions

There are four different report types available on the Insight for traffic reporting on agents or extensions:

- **Agent/Extension Traffic Report** – provides a breakdown of the traffic for individual agents within an agent group. An agent/extension traffic report provides historical call statistics data for each device within a selected group. The report is presented in an agent/extension per row format with a "totals" entry for the whole group being presented at the bottom of the report. Pagination of the report occurs if either there are too many devices to fit in the height of a page or there are too many statistics parameters to fit in the width of a page.

- **Agent/Extension Traffic Profile Report** – provides a profile of traffic information for an individual agent over a number of time periods.

  An agent/extension traffic profile report provides historical call statistics data for a selected device presented in a series of uniform time bands. The interval time governing the time bands can be anything from one minute up to 999 weeks.

  The report is presented in a time band per row format. Pagination of the report occurs if either there are too many time bands to fit in the height of a page or there are too many statistics parameters to fit in the width of a page.

- **Group Traffic Report** – provides a breakdown of traffic information for all agent groups within an agent super group (group of groups), such as "All Agents."

  An agent/extension group traffic report provides historical call statistics data for each agent group within a selected agent/extension super group. The report is presented in a device group per column format. Pagination of the report occurs if either there are too many groups to fit in the width of a page or there are too many statistics parameters to fit in the height of a page.

- **Group Traffic Profile Report** – provides a profile of traffic information for an agent group, such as "Sales" or "Support," over a number of time periods.

  An agent/extension group traffic profile report provides historical call statistics data for a selected agent/extension group presented in a series of uniform time bands. The interval time governing the time bands can be anything from one minute up to 999 weeks.

  The report is presented in a time band per column format. Pagination of the report occurs if either there are too many time bands to fit in the width of a page or there are too many statistics parameters to fit in the height of a page.

Traffic Reports for Lines

There are five different report types available on Insight for traffic reporting on DNIS/ DID numbers and three report types for lines:

- **Line/DID Traffic Report** – provides a breakdown of the traffic information for individual Lines/DIDs within a group.

  A Line/DID traffic report provides historical call statistics data for each line or DID number within a selected group. The report is presented in a line/DID per row format with a "Totals" entry for the whole group being presented at the bottom of the report. Pagination of the report occurs if either there are too many devices to fit in the height of a page or there are too many statistics parameters to fit in the width of a page.

- **Line/DID Group Traffic Report** – provides a breakdown of traffic information for all groups within a Line/DID super group (group of groups), such as "All Lines" or "All DIDs."

  A Line/DID group traffic report provides historical call statistics data for each DID group within a selected super group. The report is presented in a group per column format. Pagination of the report occurs if either there are too many groups to fit in the width of a page or there are too many statistics parameters to fit in the height of a page.

- **Line/DID Group Traffic Profile Report** – provides a profile of traffic information for a Line/DID group, such as "Sales DIDs" or "Support Lines," over a number of time periods.

  A Line/DID group traffic profile report provides historical call statistics data for a selected group presented in a series of uniform time bands. The interval time governing the time bands can be anything from one minute up to 999 weeks. The report is presented in a time band per column format. Pagination of the report occurs if either there are too many time bands to fit in the width of a page or there are too many statistics parameters to fit in the height of a page.

For each of these reports, to configure the statistics analysis thresholds that control the calculation of the Grade of Service (GOS) refer to "Configuring DID groups or Configuring lines" in the help file.

Utilization Reports

Utilization reports apply to agents and extensions and are available in two formats: standard and profile. There are four utilization reports in all.

An agent or extension utilization report provides historical time utilization data for each agent or extension within a selected group. Note that the times are shown as a percentage normalized to the shift that you collated the report with. The report is presented in an agent per row format with a "totals" entry for the whole group being presented at the bottom of the report.

Pagination of the report occurs if either there are too many agents to fit in the height of a page or there are too many statistics parameters to fit in the width of a page. Utilization percentages can be calculated with respect to either the total reporting period or the amount of time each agent had spent logged on.

Note The "totals" entry for each column is the average for all agents/extensions in the group.

An agent utilization profile report provides historical time utilization data for a selected agent presented in a series of uniform time bands. The interval time governing the time bands can be anything from one minute up to 999 weeks. The report is presented in a time band per column format. Pagination of the report occurs if either there are too many time bands to fit in the height of a page or there are too many statistics parameters to fit in the width of a page.

Utilization percentages can be calculated with respect to either each profile interval or the agent/extension logged on time with each profile interval.

Note The times shown are a percentage normalized to the shift that you collated the report with.

Contention Reports (Insight Plus Only)

Contention reports are available as standard or profiled over flexible time periods.

A standard contention report provides the percentage of time a variable number of members in a group were simultaneously free/busy. The statistics are presented either as non-cumulative or cumulative.

- **Non-cumulative** - Each line of the report gives the percentage of time that exactly that number of members were free.

- **Cumulative** - The first line of the report gives the percentage of time zero members were free. The second line gives the percentage that up to one member was free. The third line gives the percentage that up to two members were free and so on until the number of members in the group or Max Items has been reached.

A series of either line groups, extension groups, or agent groups can be analyzed within a single report. The report is presented in a group member per row format. Pagination of the report occurs if either there are too many group members to fit in the height of a page or there are too many groups to fit in the width of a page.

A contention profile report provides historical time data for the percentage of time a variable number of members in a group were simultaneously free/busy. The statistics are presented either as non-cumulative or cumulative.

A single report can analyze a line group, an extension group, or an agent group. The report is presented in a time band per column format. Pagination of the report occurs if either there are too many time bands to fit in the height of a page or there are too many statistics parameters to fit in the width of a page.

Distribution Reports

Wait Time (DID Super Group, DID Groups, Lines Super Group)

A wait time distribution report provides the number of calls and percentage of calls whose wait time fell within a series of user configurable time bands.

The report can analyze the waiting time distribution for:

- Answered Calls
- Abandoned Calls
- Or Both

The report is presented in a wait time band per row format. Pagination of the report occurs if either there are too many time bands to fit in the height of a page or there are too many groups/DID numbers to fit in the width of a page. The reports are available as ACD only, non-ACD only or both on the same report.

Wrap-up Time (Agent Groups, Agent Super Groups)

A wrap-up time distribution report provides the number of calls and percentage of calls whose wrap-up time fell within a series of user configurable time bands.

- Incoming Calls
- Outgoing Calls.
- Intercom Calls (Agents, Extensions, Agent Groups, and Extension Groups only)
- Any combination of above.

The report is presented in a wrapup time band per row format. Pagination of the report occurs if either there are too many time bands to fit in the height of a page or there are too many groups/agents to fit in the width of a page.The reports are available as ACD only, non-ACD only or both on the same report.

Call Time (All Types)

A call time distribution report provides the number of calls and percentage of calls whose call time fell within a series of user configurable time bands. The report can analyze the call time distribution for:

- Incoming Calls
- Outgoing Calls.
- Intercom Calls (Agents, Extensions, Agent Groups, and Extension Groups only)
- Any combination of above.

The report is presented in a call time band per row format. Pagination of the report occurs if either there are too many time bands to fit in the height of a page or there are too many groups/members to fit in the width of a page.

Account Code Reports

An account code traffic report provides historical call statistics data for each account code within a selected account code group. The reports are available as ACD only, non-ACD only or both on the same report.

The report is presented in an account code per row format with a "totals" entry for the whole group being presented at the bottom of the report. Pagination of the report occurs if either there are too many account codes to fit in the height of a page or there are too many statistics parameters to fit in the width of a page.

Forecasting

The Forecasting feature includes:

- Forecasting Report
- Forecasting Profile Report
- Forecasting Modifications
- Managing Historical Reports

The forecasting package is designed to enable the user to perform what if scenarios on the historical data. This is achieved as follows:

Over a period the following parameters are calculated:

- The total number of incoming calls.
- The average incoming call time (including held time, but excluding wrapup time) on the line side of the call.
- The average waiting time of an incoming answered call on the line side.
- The number of available agents.
- The average wrapup time per incoming call.
- The average amount of time each agent spent unavailable excluding wrapup time.

You then may specify a series of modifications to be performed on the above parameters.

Forecasting Report

A forecasting report calculates the actual number of calls, average call time, average wait time and number of available agents over a specified time period using specified line and agent groups. It then provides an estimate of how one of these parameters would vary depending on specific modifications made to the other three. The specified modifications can be applied individually - resulting in a series of estimates, or they can be applied collectively - resulting in a single estimate.

Note The results produced by the forecasting package are calculated from a set of rules that may not apply perfectly to every site. While every effort has been made correct these figures on a site-by-site basis, the results should be used for indication purposes only.

Forecasting Profile Report

A Forecasting Profile Report calculates the same type of information as a Forecasting Report, except that it can cover a single time band or an interval which includes several time bands in a single estimate.

Like the Forecasting Report, the Forecasting Profile report calculates the actual number of calls, average call time, average wait time and number of available agents over a series of uniform time bands using specified line and agent groups. It then provides an estimate of how one of these parameters would vary depending on specific modifications made to the other three.

The specified modifications can be applied individually, resulting in a series of estimates per time band, or they can be applied collectively, resulting in a single estimate per time band. The interval time governing the time bands can be anything from one minute up to 999 weeks.

The report is presented in a time band per column format. Pagination of the report occurs if either there are too many time bands to fit in the width of a page or there are too many modifications to fit in the height of a page.

Create Report Template

Report templates define the look and content data included in a report. You can use any of the default report templates or create custom templates that can be used over and over. The steps show how to create a custom template.

Note To further refine the report content, also see "Filter Report Contents (optional)" on page 43.

1. From the Reporter toolbar, click on the Report Template icon

   ...or select Set-up, Report Templates per the Menu bar.

2. Type a new template name over the existing name.

   This is the template file name. The name that appears on the printed report is entered later, in Step 3.

   From the Report Templates, you can create/edit templates: Add, Change, Delete, Rename
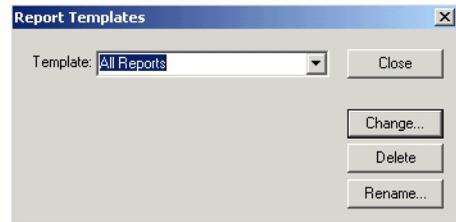
Note The Change button turns into the Add button when you type a new template name.

3. Click Add and the Configure Report Template screen displays (shown right). Type the report title in the Print Name box and click OK.
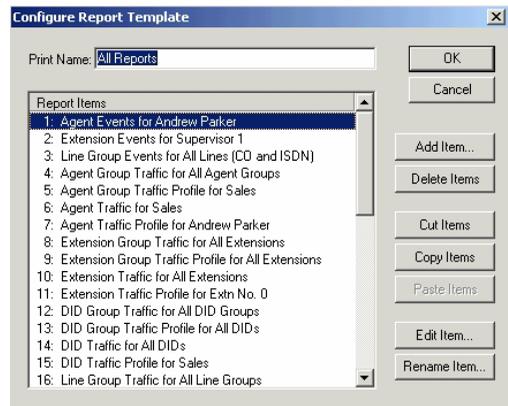
...or click Change and the Configure Report Template screen displays. Highlight a Report Name and click one of the buttons to the right (e.g., Edit Item) to make your change. Click OK.

...or click Delete, then select the name of a template to delete. A dialog box displays asking you to confirm the deletion.

...or click Rename. From Rename Report Template, type in a New Template Name and click OK.

4.   Click Close.

Edit Report Contents

1.   From the Reporter toolbar, click Report Templates.

2.   From Report Templates, select the template from the drop-down menu and click Change.

3.   Select the Report Item you wish to change and click Edit Item. The Configure Report screen displays (sample shown at right).

4.   From the Configure Report dialog box:

   •   Select the Agent Group from the pull-down list

   •   Select Agent Number, Name or Both

   •   Select any of Total: Calls, Time, Usage

   •   Select Calls: Answered, Transferred, RNA, Intercom, Outgoing

   •   Select Performance: Calls, Availability, Call Rate
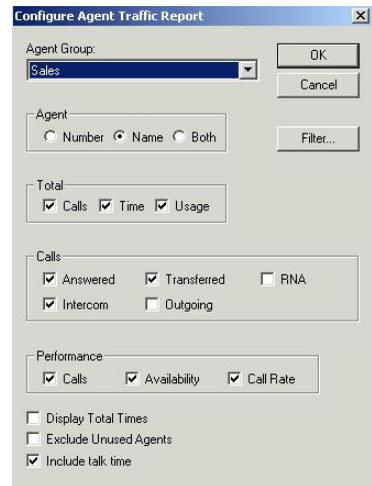
The Call Rate is the number of calls taken/made per hour by an agent. However, the time that the agent is logged on is taken into account to give a more accurate figure. The Call Rate is then worked out by dividing the number of calls by the time logged on.

Call Rate = $\dfrac{\text{Total Number of Calls}}{\text{Time Logged On}}$

- Display Total Times shows total call time instead of average

- Exclude Unused Agents removes inactive agents for the report

- Include Talk Time includes a column separating talk time from total call time

5. To add a filter, go to Filter Report Contents (optional)

   ...or click OK to save the changes.

Filter Report Contents (optional)

Filtering is how to selectively determine the content of a report. The Configure Report window contains checkbox selections that indicate the data to be included. These items are defined in the Reports Glossary or the user guide glossary. We suggest that you create various reports selecting different Report Items and data to determine which combination works best for you.

1. From the Configure ... Report screen, click Filter. The Report Filter screen displays (shown right).
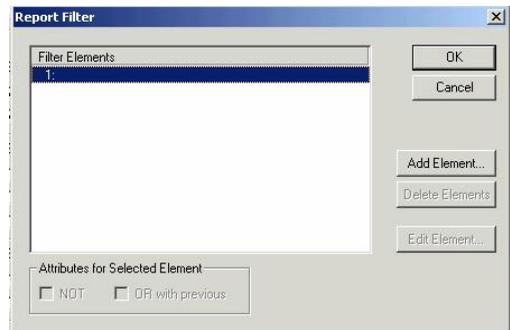
2. Click Add Element. The Add Filter Element screen displays (shown right).

   ...or highlight a Filter Element in the list and click Delete Element or Edit Element.
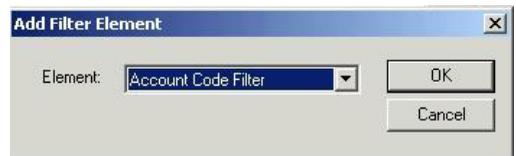
3. If you selected Add Element, a Add Filter Element screen displays and you need to select the type of element to be used from the drop-down menu.

   ...or if you selected Edit Element, a Edit Account Code Filter Element screen displays and you need to select an account code name from the drop-down menu.

   ...or if you selected Delete Element, the element is deleted.

   Hint: It is helpful to rename filtered files so that you can identify which filter has been applied to it.

4. Click OK.

Create Report

If you have a color printer, Insight Reporter can produce color printouts.

1. From the Menu bar, select File > New

   ...or click on the New Report icon. The Request a New Report screen displays (shown right).

2. Select the time period the report will cover (Start and Stop Times), the Report Shift and the report template.

Note The available Report Shifts are created from Configure Shift window. See the *Insight CIX Installation Guide* for more details about creating and editing shifts.

3. Click OK. The report should be compiled in a few minutes. A sample report is shown in Figure 1.

4. You can now print, save (Insight Plus only), export (Insight Plus only), or close the screen.

Figure 1   Sample Agent Traffic Report

Export Report

Report information can be saved in comma delimited ASCII format that can be imported into most commercial spreadsheet and database programs. Plain text fields are exported in double quotes.

• Integers are exported without quotes.

• Floating point number, such as averages, are exported without quotes with three decimal places.

Important! *The Report you want to export must be displayed on the screen for the Export function to be active.*

1. From the Reporter toolbar, click on the Export icon

   ...or from the Menu bar, click File > Export. The Export as screen displays (shown right).

2. In the *Save in* field, select a directory/file where you want the file saved.

3. In the *File name* field, type a file name or select the default.

4. In the *Save as type* field, you must select the default of Insight Export Files (*.txt).

5. Click Save.

Using MIS Reports to Improve Performance

This section deals with some of the potential problems identified using the reporting package and possible solutions to those problems. As with many things there could be a number of ways to improve performance and increase productivity so you may need to try different things to see which work the best.

Abandoned Calls and Long Waits

You may identify a problem of long waits and too many abandoned calls. Here are some solutions to this problem:

Solution A – Use Recorded Announcements and Music

Using methods for keeping the caller waiting is usually one of the first methods employed to handle the callers. This can be accomplished using the recorded announcement facilities. Well worded messages played to callers in the queue have proved to be very successful. Avoid repeating the same message over and over and consider playing music or other recorded information between greetings.

Solution B – Restrict Outbound Activity

If your staff make outgoing calls at the same time as they receive inbound calls, consider restricting the outbound activity to a less busy time of day. Use Profile Reports to identify the peak hours and the quietest times of the day.

Solution C – Overflow Calls to Other Staff Members

Consider overflowing calls to other members of staff in other areas of the business. Although this could be less than ideal it could eliminate the lost order or lost customer. Research has shown that 60% of callers who abandon do not call back.

Solution D – Introduce Headsets

If you do not use headsets, consider introducing them. Headset use will speed up calls whenever keyboard work is involved. Headsets could also permit the use of the auto answer feature on Strata. This speeds up the call process and reduces noise and stress in the call center.

Solution E – Use Profile Reports to Identify Staffers Needs

Use Profile Reports to identify peaks and valleys in terms of activity. Rarely will the level of traffic be constant. Having identified the peak hours consider changing the working hours of staff and maybe consider part time employees.

Complaints of Busy Signals

Use the Contention or Contention Profile Report to identify the size and timing of the problem. Caution should be used before rushing out and adding more lines, even though they may be relatively inexpensive. The additional lines could result in periods where callers go unanswered if the staff available is not adjusted to take more calls.

Solution A – Add More Lines

Assuming you have staff available to answer the extra volume, add more lines to your system.

Solution B – Restrict Outbound Activity

If your staff make outgoing calls at the same time as they receive inbound calls consider restricting the outbound activity to a less busy time of day. Use Profile Reports to identify the peak times and the quietest times.

Solution C – Reduce Call Duration

Find out if it is possible to reduce the duration of calls. If you can achieve this without reducing the quality of service then this will enable you to answer more calls with the same number of lines and people. Call duration is the time spent on the call plus the wrap-up time allocated for the end of the call. Before embarking on a call time reduction campaign consider the profile of the best agent. You might want to consider training your staff to the performance level of this agent.

Solution D – Check Out Wrap-up Time

Check out the wrap-up time associated with telephone calls. If the time is excessive, find out why. It could be, for example, that quotations have to be sent out. Perhaps faxing from the PC could speed up the process thereby increasing the volume of calls that can be handled.

One client established that the average time spent in wrap-up of an order took over ten minutes because the sales agent had to print off an order confirmation and take it to the mailroom for processing. Now the printer is located in the mailroom and wrap-up time is reduced by 75%.

Unexpected Out-of-hours Customer Demand

Using the out-of-hours shift for reports, you can establish if there is a demand for your services when you are closed.

Using Profile Reports, identify the demand and the timing. Consider opening at this time to handle calls. If this is not possible, consider giving callers the option to leave a message to be dealt with as a priority when you start work. The third option could be to overflow to a bureau. In all cases, it is recommended that an out-of-hours message be played apologizing for the fact you are closed, stating your opening times and advising of available alternatives, if there are any.

To measure call activity, out of hours calls must be presented to devices on the CIX that are monitored by the ACD Server. These include RAN devices, etc.

Complaints About Too Many Transfers

You may have customers who complain their call gets passed around the organization before they get the person who can deal with their problem.

Use the Agent Traffic Reports to identify the agents who transfer callers the most and then the Event Reports to find out the details. This could indicate needed training for those agents in the skills and knowledge of handling calls themselves. Inquiry calls could also indicate a similar problem.

If high proportions of calls are transferred because they are not dealt with by the receiving department, consider other methods of routing the calls into the correct department without human intervention. This could include using DID numbers to route calls into appropriate departments. This is ideal if you are in a position to educate your callers.

The ideal caller here would be a field employee, employees at other locations and customers. Another idea would be to answer all calls with an Auto-Attendant (AA) and make the user select from a menu. The AA would then route the call according to the selection made.

Wallboards

4

Create Wallboards

Each Insight MIS work station can drive up to six wallboards simultaneously via one serial port connection.

Step 1: Select Wallboard Serial Port

1. From the Menu bar, select Wallboards > Driver. The Wallboard Driver screen displays (shown right).

   ...or from the toolbar select the Wallboard icon.

   Wallboard Driver

Wallboard Type:	Shorekarn Messagemaker 4x21	OK
Serial Port:	COM1	Cancel
Baud Rate:	9600	

2. Select the wallboard type, the appropriate Serial port, and for some wallboard types the Baud Rate. Spectrum Wallboards are the only ones supported in the United States.

3. Click OK.
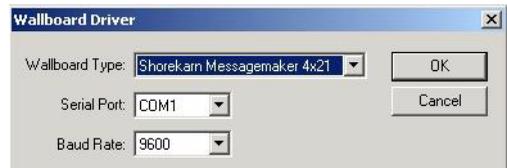
Step 2: Configure Wallboard

1. From the Wallboard Configuration window, click Configure.

   Note Only the selected wallboard number can be configured. Each wallboard must be selected by number and configured individually.

---

2. Delete any schedule that you do not need by highlighting it and clicking Delete Schedules.

3. Verify Fitted is checked (at bottom of screen).

Important! *If the Fitted field is not checked, the wallboard will not work*
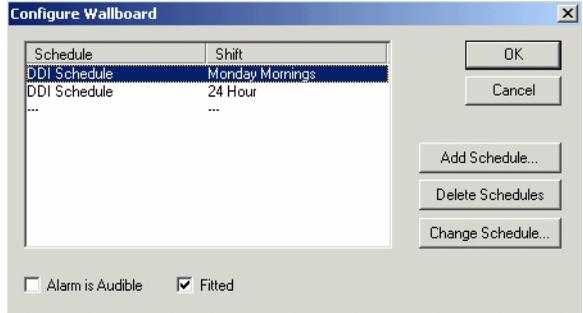
Step 3: Create Wallboard Template

Templates define the text size and the placement of information on the wallboard. They also define the type of real time parameters and text scrolling. You can create as many wallboard templates as you want.

1. From the Menu bar, select Wallboard > Configure

   ...or click the Configure Wallboards icon. The Wallboard Configuration screen displays (shown right).
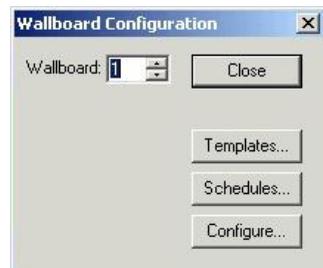
2. Click Templates. The Wallboard Templates screen displays (shown right).

3. Type a new template name over the existing name.

   Note The Change button turns into the Add button when you type a new template name.

4. Click Add. The Configure Wallboard Template displays (shown right).
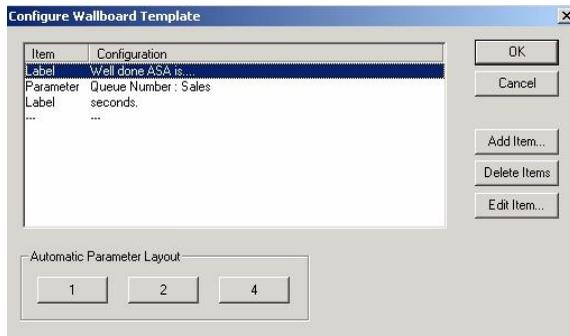
5. Click Add Item. The Add Wallboard Template Item screen displays (shown right).
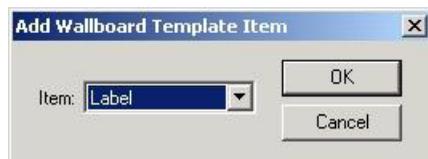
6. From the *Item* field, select Label, Message or Parameter and click OK. The item is added to the Configure Wallboard Template screen.

7. Under Automatic Parameter Layout, click 1, 2, or 4 to automatically define the position and width of the labels and parameters in the template. See "Automatic Parameter Layout" on page 54 for details on using this option.

   ...or manually configure the position, size and/or justification of each parameter. See "Edit Wallboard Items" on page 53 for details.

8. Click OK > Close. The Wallboard Configuration screen displays.

Step 4: Create Wallboard Schedule

The next step is to create a schedule for displaying the templates. A wallboard schedule essentially defines the sequence in which the templates should display. At the end of the sequence, the scheduled sequence starts over. You can create as many schedules as you want to manage the wallboards.

1. From the Wallboard Configuration screen, click Schedules.

2. Type a new schedule name.

   Note The Change button turns into the Add button when you type a new template name.

3. Click Add. The Configure Wallboard Schedule screen displays (shown right).
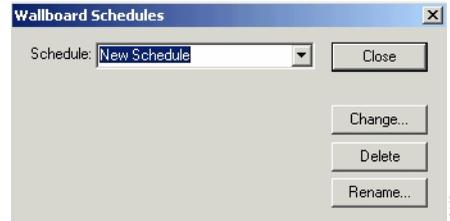
4. Click Add Template to view the templates. The Add Wallboard Template screen displays (shown right). Select one of the Templates from the drop-down menu.
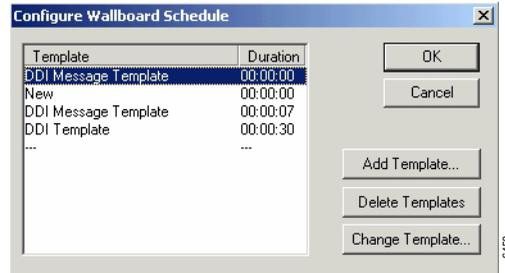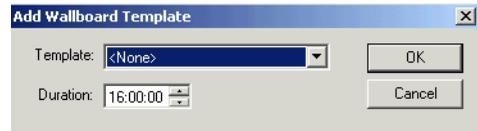
   Note See "Step 2: Configure Wallboard" on page 49 to Delete or Change Template(s).

5. Enter the wallboard template duration.

6. When scheduling is complete, click OK twice, then click Close.

Edit Wallboard Items

1. From the Menu bar, select Wallboard > Configure

    ...or click the Configure Wallboards icon. The Wallboard Configuration screen displays.

2. Click Templates. The Wallboard Templates screen displays.

3. Select the Wallboard from the drop-down menu.

4. Click Change. The Configure Wallboard Template displays.

5. Highlight an item in the list and click Edit Item.

6. If you selected a label to edit, the Configure Wallboard Label screen displays (shown right). Type the name of the label in the Label field, select its position (row, col.) and its font size (small, large). Click OK.

Note   All items on a wallboard must have the same size font.
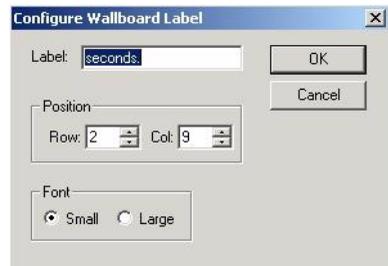
    The revised label displays in the Configure Wallboard Template list.

    ...or if you selected a parameter to edit, the Configure Wallboard Parameter screen displays (shown right). From the drop-down menus, select the Device Type, Device Name and Parameter. Select a position (row, col., width in digits), justification (left, center, right) and font size (small, large). Click OK.
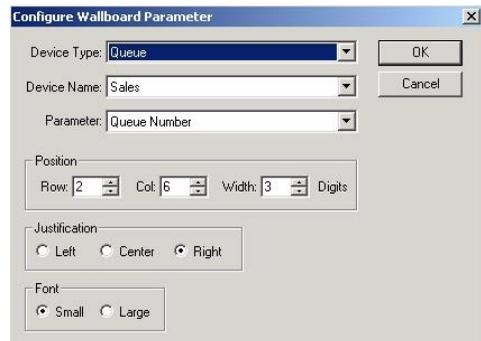
Note   All items on a wallboard must have the same size font.

    The revised parameter displays in the Configure Wallboard Template list.

Automatic Parameter Layout

When adding parameters and labels to a wallboard template, you need to define the position and width of these items on the wallboard display. To avoid this process, Insight MIS provides three automatic layouts—1, 2, and 4—on the Configure Wallboard Template screen.

1. Using the Add Wallboard Template Item screen, add into the template the parameters you wish to display.

2. From the Configure Wallboard Template screen, based on how many parameters you added in Step 1 click 1, 2 or 4 in the Automatic Parameter Layout section of the screen.

    The parameters are arranged in one line, two lines or four quadrants according to the option you chose. Labels are automatically inserted where possible for the parameters.

3. Click OK when done.

Change Fonts

There are two sizes of fonts for wallboards.

- **Small** – Depending on the wallboard, up to one or two rows of characters can be displayed. This size works well with real time performance information, since it allows up to six parameters to be shown.

- **Large** – One row of large text can be displayed. Large text is good for scrolling messages.

1. From the Menu bar, select Wallboard > Configure

   ...or click the Configure Wallboards icon. The Wallboard Configuration screen displays.

2. Click Templates. The Wallboard Templates screen displays.

3. Select the Wallboard from the drop-down menu.

4. Click Change. The Configure Wallboard Template displays.

5. Click Edit Item and the Configure Wallboard Parameter screen displays (shown right).

   Note All items on a wallboard must have the same size font.
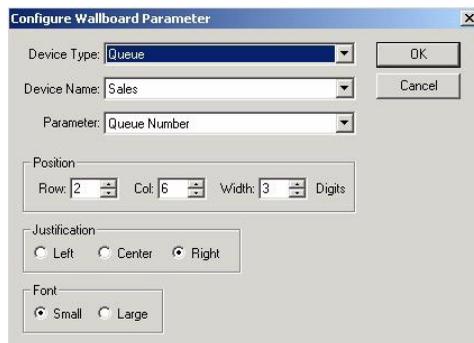
6. Select Small or Large.

7. Click OK to exit out of this screen.

Create Wallboard Message

An agent can send a message of up to 256 characters to any other Agent(s) or all the Agents in any other Security Group(s) depending on his or her Message Access Level.

Note The same message can also be sent to any of the wallboards at the same time as well as inView, if it is used.

Wallboard messages can be scheduled to appear for specific durations.

1. Select Messaging > Send Messages

   ...or select the Send Messages icon.
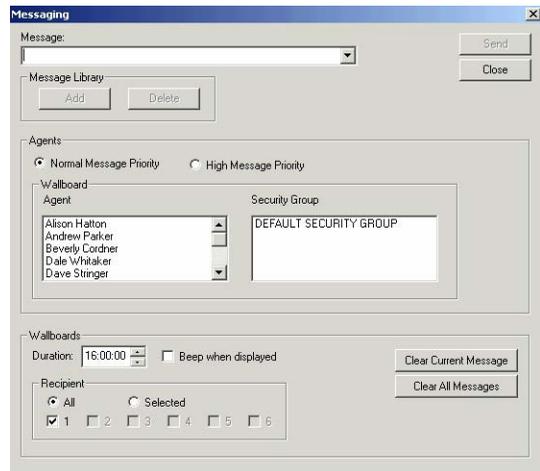
2. Type your message in the *Message* field.

3. Click Add under Message Library if you want to add it to the message database library. The message is added as a selection to the drop-down menu in the *Message* field and can be quickly recalled whenever required.

   At a later time, the message can be deleted from the library by clicking on Delete.

4. Select the priority for the message — normal or high (only inView supports priority).

5. If using inView, highlight the Agents you want to send the message to or highlight a security group to send it to all the Agents in that group.

6. If using the external wallboard, under Wallboards, in the *Duration* field, select the display time.

7. Select All to display it on all wallboards or Selected and the number(s) of the wallboards on which to display it. Check "Beep when displayed" to have the wallboard beep when the message is displayed.

8. Click Send > Close.

Note If you set the message to display for an indefinite amount of time, click Clear Message when you want to remove it.

Queue Messages

You can queue up a message for display on a wallboard or series of wallboards.

➤ Click Clear All Messages to remove all the messages queued up on the wallboards.

Wallboards
Queue Messages

Alarms 5

An on-screen alarm window is available to view all the events causing an alarm. This log can be filtered for each individual or group to present only information needed by the user.

Configure Alarms

You must first configure the alarms for each set of devices for whom you wish to set alarm thresholds. This is done in the Insight MIS.

Table 4   Alarm Thresholds

Alarm	Available on	May Indicate
Wait Time – A call has been waiting too long to be answered.	Lines Line Groups DIDs DID Groups Ext. Groups Agent Groups Queues Queue Groups	An imbalance of lines to extensions/agents.

Table 4   Alarm Thresholds *(continued)*

Alarm	Available on	May Indicate
Held Time – A call which remains on hold for too long.	Lines Line Groups DIDs DID Groups	A need for training. Need to allocate more agents or change the groups' answering priorities.
Calls Waiting – The number of calls waiting to be answered.	Line Groups DIDs DID Groups Ext. Groups Agent Groups Queues Queue Groups	An imbalance of lines to extensions/agents. May need to rearrange the groupings. A training issue. Use other stats to pinpoint need.
Lines In Use – The number of lines used is near capacity.	Line Groups DIDs DID Groups Ext. Groups Agent Groups	Need more DIDs/lines. Need to rearrange the way the lines and DIDs are grouped.

Table 4   Alarm Thresholds *(continued)*

Alarm	Available on	May Indicate
Ring on Time – A call has been ringing an extension for too long.	Extensions Agents	Possible under-staffing problem. Could move agents from a quieter group to cover under-staffing.
On Call Time – A call has been connected for an excessive amount of time.		Possible training requirement. Agents may need to be able to take control of the call to get information as quickly as possible. Discipline required.
Wrap up Time – An agent is taking too long to wrap up.		A training requirement. Agents may not be using the contact management (or other) application very well.
Unavailable Time – Shows when agent or extension has been unavailable for too long.		Discipline required.
Log On – Shows when an agent has logged on to an extension.		An unrecognized agent may have logged on at an extension.
Messages – Extension/Agent has sent a message to the supervisor.		Indicates a message was sent to the supervisor's screen.
Idle – An agent has been idle/ available to take calls for too long a time.		Possible over-staffing problem. Could move agents from a quieter group to cover under-staffing.
Busy – An agent has been busy for too long.		Possible under-staffing problem. Could move agents from a quieter group to cover under-staffing.

Terms associated with alarms are explained in Table 5.

Table 5   Statistical Analysis Threshold

Stat. Analysis	Indicates	Available on	Reason for alarm
Wait Time	A call that has been waiting to be answered for longer than the acceptable wait time. (Affects GOS.)	Lines Line groups DIDs DID groups Queues Queue Groups	May signify an imbalance of lines to extensions/agents.
Held Time	A call which remains on hold for too long.	Lines Line groups DIDs DID groups	Could be a need for training. Could need to rearrange groupings of lines, DIDs and agents. More agents may be needed.
Valid GOS	The level of service has dropped below the required standard (based on an algorithm made from a range of stats).	Lines Line groups DIDs DID groups Extensions Ext. groups Agents Agent groups Queues Queue Groups	Summarizes the effect of a range of parameters. The algorithm uses many threshold values to provide a general picture of performance. Acceptable GOS can be different for each agent or extension. (Can start low for new agents and increase the GOS over time. Could be linked to pay structure.)

Table 5   Statistical Analysis Threshold *(continued)*

Stat. Analysis	Indicates	Available on	Reason for alarm
Ring On Time (Ring No Answer)	Shows when a call has been left ringing for longer than is acceptable.	Extensions Ext. groups Agents Agent groups	User in conjunction with number of calls in the queue. The issue can then be addressed with either a discipline or it may point to under-staffing.
Wrap up Time	Shows when an agent has been in wrap up time for too long.		Could be a training need.
Held on Time	Calls were held at the extension too long before being transferred or retrieved.		Could be a training issue. Why are the calls being held too long? Is it all agents or just one or two?
Short call	Shows when an agent or extensions has been free for too long.	Extensions Ext. groups Agents Agent groups	Identifies agents who may not be getting the best from their calls. Who are they ringing? Why are they not getting a good response? Do they need training or discipline?
Long call	Shows when calls are too long to be effective (affects GOS).	Extensions Ext. groups Agents	Identifies agents who take too long to get information required. Training may be needed.

Filtering Alarms

1. From the Menu bar, click Setup > Alarms. The Alarms Configuration screen displays (shown right).

2. From Alarms Configuration, choose the appropriate button and check Audible Alarms if applicable.

   Audible alarms require a SoundBlaster compatible card installed in the PC with associated multimedia drivers.

3. If you selected Edit Lines, the Line Alarms Configuration screen displays (shown right). Select a Filter Group from the drop-down menu and check any appropriate fields. Click OK.

   Refer to Table 4 for alarm definitions.

   ...or if you selected Edit DIDs or Edit Groups in any of the sections, a screen similar to the one on the right displays. Select a Filter Group from the drop-down menu and check the appropriate alarms. Click OK.
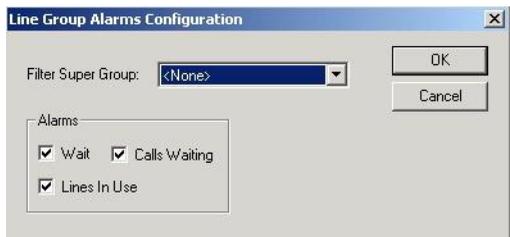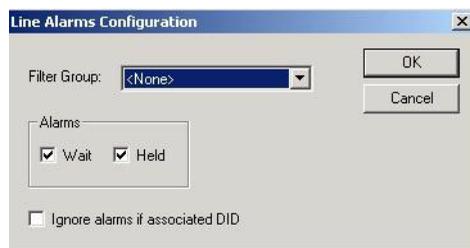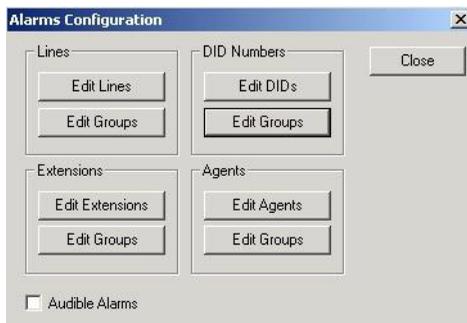
...or if you selected Edit Extensions or Edit Agents, a screen similar to the one on the right displays. Select a Filter Group from the drop-down menu and check the appropriate alarms. Click OK

4. Close the Alarms Configuration window.

View Alarms

From the Alarms Window, you can monitor alarms that have been triggered.

Alarms appear in red on the screen (see "Indication Colors" on page 13 for a detailed description of screen indicator colors).

➤ Click the Alarms icon.

Alarms
View Alarms

Glossary

The following table contains definitions for terms used in this document.

Term	Definition
ACD	Automatic Call Distribution.
Account Code	While handling a telephone call it is possible for an extension/agent to enter account codes to describe the nature of the call. Up to nine digits can be entered per account code and 20 account codes can be entered per call. An analysis of account code usage is provided by the Insight Reporter.
Account Code Group	A group of account codes. When configuring an account code group you specify which account codes belong to the group. (The order in which the account codes are listed as members of an account code group controls the order the account codes will be presented on a historical report associated with the group.)
Account Code Super Group	A group of account code groups. When configuring an account code super group you specify which account code groups belong to the super group. (The order in which the groups are listed as members of a super group controls the order the groups will be presented on a historical report associated with the super group.)
Agent	An agent is the telephone operative who handles calls at an extension. Each Agent is identified by a PIN they use at the extension. The PIN should uniquely identify the agent if Insight is to give meaningful statistics concerning the activity of agents.

Term	Definition
Agent Contention	A situation where there are not enough agents available to take calls within the named agent group.
Agent Group	An agent group is a collection of agents monitored by the Insight MIS. Agents can belong to multiple agent groups if necessary. For each agent configured in the system you can make one of the groups that it belongs to its default group. In this case the agent inherits its configuration from the chosen default group. This facility allows you to configure the attributes of a set of agents by simply configuring the attributes of the corresponding default agent group.
Agent Super Group	An agent super group is a collection of agent groups monitored by the Insight MIS. By making reference to a single agent super group, the Insight MIS collects a set of agent groups together for real time display or historical reporting purposes.
Alarms Window	This is a separate window from the Insight MIS application window that provides a list of alarms in chronological order (most recent first) that are currently active in the system. Each item in the alarms list presents the following information: • Type of device that is causing the alarm • Name of the device that is causing the alarm • Type of alarm.
Call Line Identity (CLI)	The Call Line Identity (CLI) of an incoming call is the telephone number of the caller. When the caller is using a direct exchange line the CLI will usually identify the caller correctly. In cases where the caller is dialing out from a PBX, the CLI will normally only identify the organization who made the call and not the individual caller.
Contention Report	A contention report provides the percentage of time a variable number of members in a group were simultaneously free/busy. The statistics are presented either as non-cumulative or cumulative.
Device	A line, DID number, extension or agent.
DID Group	A DID group is a collection of DID numbers monitored by the Insight MIS. DID numbers can belong to multiple DID groups if necessary. For each DID number configured in the system you can make one of the groups it belongs to its default group. This facility allows you to configure the attributes of a set of DID numbers by simply configuring the attributes of the corresponding default DID group.

Term	Definition
DID Numbers	A Direct Inwards Dial (DID) number is a dynamic numeric attribute assigned to a line on an incoming call. A DID call can be routed to groups of extensions/agents or to individual extensions/agents depending on how the call routing software within the switch has been programmed. Insight MIS can monitor in real time and historically the activity of inbound calls associated with DID numbers.
DID Super Group	A DID Super Group is a collection of DID groups monitored by the Insight MIS. By making reference to a single DID super group, Insight MIS collects a set of DID groups together for real time display or historical reporting purposes.
Exporting data (ASCII)	Exporting data - Use this command to export the data contained in the report displayed in the currently selected data window. The data is exported in comma delimited ASCII format. This exported data file can be read into most commercial spreadsheet and database programs.
Extension	An extension is the physical telephone handset at which an agent can receive incoming calls, make outgoing calls or handle other forms of internal telephony traffic.
Extension Contention	Not enough extensions are available to take calls within the named extension group.
Extension Group	An extension group is a collection of extensions monitored by the Insight AS. Extensions can belong to multiple extension groups if necessary. For each extension configured in the system you can make one of the groups that it belongs to its default group. In this case the extension inherits its configuration from the chosen default group. This facility allows you to configure the attributes of a set of extensions by simply configuring the attributes of the corresponding default extension group.
Extension Super Group	An extension super group is a collection of extension groups monitored by the Insight MIS. By making reference to a single extension super group, the Insight can quickly collect a set of extension groups together for real time display or historical reporting purposes.
GOS	GOS - Grade of Service.

Term	Definition
Line	In the context of Insight MIS, a line represents either one of your external trunks connected to the switch being monitored or one of your network tie lines connecting the monitored switch to some other external switch. Each line can handle only one telephone call at any one time. These calls are denoted as incoming or outgoing calls depending on whether the call originated outside or inside the monitored switch.
Line Contention	Not enough lines are free for new calls. DIDs and DID groups. Applicable to line groups,
Line Group	A line group is a collection of lines monitored by the Insight ~S. Lines can belong to multiple line groups if necessary. For each line configured in the system you can make one of the groups that it belongs to its default group. In this case the line inherits its configuration from its chosen default group. This facility allows you to configure the attributes of a set of lines by simply configuring the attributes of the corresponding line group.
Long Call	Extension/Agent has been on a call for too long. Useful for monitoring performance and identifying training needs of agents.
Long Free	Extension/Agent has been free to take calls for too long.
Long Queue	Too many calls are waiting to be answered in the queue group. Applicable to line groups, DIDs, DID groups, extension groups and agent groups.
Long Ring On	Extension/Agent has been ringing for too long.
Long Unavailable	Extension/Agent has been unavailable to take calls for too long.
Long Wait	Call has been waiting to be answered for too long. Applicable to lines, line groups, DIDs, DID groups, extension groups and agent groups.
Long Wrap	Extension/Agent has been in wrap up for too long.
Longest Wait	Length of time the longest waiting call has been waiting for.
Message	A message sent to the wallboard or inView.

Term	Definition
MIS	Management Information System – Real Time Component.
PIN	Personal Identification Number – used by an agent to log on.
Real Time Display	Once operational, Insight MIS can provide immediate visual feedback of the activity on your switch.
Report Template	Report Templates are used by the Insight Reporter to define the contents of a collated historical report. You can create any number of report templates and thereby produce a library of report types which can be quickly accessed when you collate a new historical report.
Unavailable	If an agent is logged on but needs to stop taking incoming calls temporarily, they can go into the unavailable (out of group) state. When the agent is ready to take calls again they can become available (in group) again. Insight MIS tracks the unavailable state in real time and also provides historical analysis of how long agents were unavailable and how often. Dark gray indicates the unavailable state but the text in the state column is user configurable. Generic unavailable and missed ACD call are standard features and are triggered by the agent going unavailable using their telephone handset.
Voice Mail	Extensions which have been voice mail enabled are treated slightly differently by the Insight M[S. When a normal extension is rung on by a line and subsequently connects to that line, the MIS displays the extension as being connected to the line and the line being connected to the extension. Statistics are then calculated accordingly.
Wallboards	A real time display for agents. If you have purchased the wallboard option, you can use the AS to display real time call status and statistics parameters on up to six wallboards simultaneously. You can also send messages to selected wallboards.

Term	Definition
Wrap Up	When an agent is about to finish a call, they can choose to go into wrap-up before the call is terminated. This will leave the agent in the wrap-up state thereby stopping further incoming calls being targeted at the agent. While in wrap-up the agent can do any clerical work associated with the call just taken. Once finished the agent can leave the wrap up state so that they are ready to take further incoming calls.

Insight MIS tracks wrap up in real time and also provides historical analysis of how much wrap up time each call required on a per agent basis. |

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