

## How to Use the Insight DK Demos

These instructions show you how to use the Insight DK Demos. They provide step-by-step instructions on using the demos. They cover the following topics:

- ♦ “Introduction” on Page 1
- ♦ “Getting Started” on Page 2
- ♦ “Configurator” on Page 2
- ♦ “Reports” on Page 5
- ♦ “External Wallboards (if you have a wallboard)” on Page 12

## Introduction

Welcome to Insight DK Plus MIS, a Call Center Management tool which provides real time status information, cumulative performance statistics and a range of historical reports to help you manage the people in the Call Center and the level of service you provide to your customers. The system uses the Windows™ Graphical User Interface (GUI) giving it a look and feel which is consistent with other Windows™ products you may use.

Insight DK Plus is comprised several applications combined to provide a management product that is both flexible and easy to use. In addition, external devices such as wallboards can be driven by Insight DK Plus. The main components are:

- ♦ Real Time Management Information System - MIS.
- ♦ Historical Reporting Package - Reporter.
- ♦ Configuration Interface - Configurator.
- ♦ LAN based Displays – inView. (Run the Insight DK Demo first.)
- ♦ External Wallboards.
- ♦ Help File - A full context sensitive help file is an integral part of the system and covers all areas of use and can be accessed by clicking on the Help icon on the toolbar:



... or selecting “Help” from the menu bar or pressing the F1 key.

## Getting Started

Ensure your PC is running in SVGA mode because this affects the size of the real time windows.

1. From the Start Button, select Programs, then Insight DK for Toshiba US program group.
2. Select Insight DK (or DK Plus) Demo.
3. Wait for program to load.

The Insight DK Plus Demo contains a database that generates calls to simulate a real Call Center environment. It begins generating calls as soon as you start running the demo. Notice the agents logging on and starting to receive calls when the demo starts up.

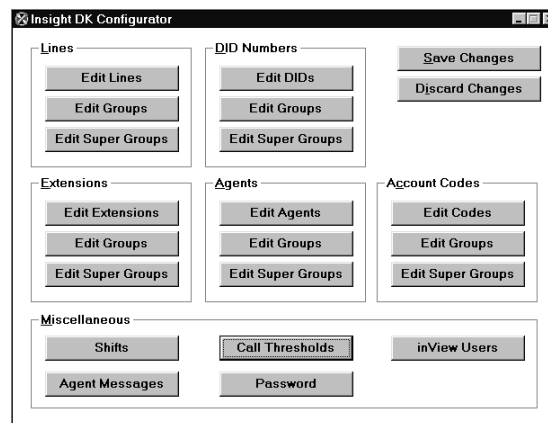
## Configurator

The Configurator defines the Lines, DID Numbers, Extensions, Agents and Account Codes to match your phone system. Items may be selected to form groups of devices and groups of groups may be formed to form super groups. All of these to provide flexibility to reporting and displaying status and performance of individuals within the Call Center.

Other important parameters defined for the system are work shifts, thresholds, inView users, passwords, and agent messages.



1. Click on the Configurator icon  
...or from the menu bar, select File, then Insight DK Plus Configurator.
2. If the Configurator is password protected a dialog box appears.  
Normally, a password is not needed for a demonstration.



## Real Time Displays

The Insight DK Plus provides real time information that can be viewed in a Windows environment on a PC monitor and displayed on wallboards. Insight DK Plus is delivered with a collection of predefined real time screen templates to give you a feel for the type of screens that can be created.

In a typical Call Center environment, a number of real time screens would be combined to provide a composite view of important parameters to monitor.

There are five types of real time window available to select from. Each window type has many options which can be combined and saved as a template. These types are as follows:

- ◆ Status display - lines, extensions and agents can be monitored
- ◆ Statistics displays - lines, DIDs, extensions, agents and their corresponding groups can be displayed
- ◆ Calls in Queue Graph - five options are available
- ◆ Wait Time Graph - five options are available
- ◆ Large Character Display - over 200 different types to choose from

### Showing Real Time Views

When the Demo starts, it displays a view titled “General Status (1).” If this view is larger than your screen, use the scroll bars to view all of the available display windows.

1. From the Tool Bar, click on the down arrow to show a list of additional views that may be displayed.
2. Select the General Status (1) VGA from the list.

Notice that this view fits within your screen since it was defined using smaller images.

All items shown do not always have to take up space on the screen. Along the bottom of the screen are two minimized windows. When you click on the maximize button, they expand to show more detailed statistics; clicking minimize returns to the smaller image.

You can continue to show other views from the list to demonstrate the variety and capabilities of the various views.

Insight DK uses four colors for various alarms and call states.

Color	Meaning	Notes
Red	Alarm	Waiting time threshold exceeded, etc.
Yellow	Ringling	Device or line is ringing
Blue	Busy	Agent on call, in wrap up, etc.
Green	Idle	Agent is idle. Line is free.
Grey	Device logged off	

## Changing a Display View

Each real time window has properties that can be viewed and changed by means of a mouse.

**Tip:** If you are creating multiple windows of the same type or size, edit them and size them first before creating a new one. Using this method, only the device, device name and parameter will need to be changed. (When a new window is created, it defaults to the same properties and size of the last selected window.)



1. Right click on the Agent Status window  
...or click the Properties for Agent Status Window icon.
2. From Properties for the Agent Status window, edit any of the properties.
3. Click OK when done.
4. On the Tool Bar, click the Save icon to save the changes.

Each time this view is used, these changes will be included.

## Create a New View

The easiest way to create a composite screen is to start with one of the default templates within the system, copy it and change the copy by adding new windows to match your requirements.

**Tip:** The windows should be laid out logically and should only display relevant information. Too many windows and too much information will lead to confusion.

1. From the Toolbar, click the down arrow to select a template.
2. Highlight the name of a template from the drop-down list and type a new name over the existing template name, press Enter.
3. Edit any windows within the default template as described previously in [“Changing a Display View”](#).



4. Click on the New icon. Select a new window from the list contained in the dialog box.
5. Adjust windows as desired.



6. From the Tool Bar, click the Save icon.



Pull-down a list of available Display Templates

This makes a copy of the template which allows you to make changes without affecting the original template.

Windows can be manipulated the same as other Windows applications (moving, resizing, minimizing, etc.).

Changes are saved and each time this view is used, these changes will be included.

## Reports

The Insight DK Plus Reporter uses raw data that is continually collected by Insight DK Plus and presents it in user-definable historical report format. The reports can be viewed on screen or printed. Reports can be compiled using data originating as far back as the installation date of the Insight DK Plus system, even if upgrades have since been installed.

You can filter out irrelevant data, generated at times of the day or week in which you are not interested first by creating a shift. Shifts are created using the Insight DK Plus Configurator, explained “[Configurator](#)” on [Page 2](#). Shifts can be defined to reflect working times of different groups, but can also be used to define a period of time during which there are always problems, such as Monday mornings and Friday afternoons.

Once a shift has been created, you can compile a report that uses data collected only during that shift. This is particularly useful for a manager who needs to find out what happened during a particular shift when they were not there.

**Tip:** To produce meaningful reports it is best to wait until the demo has been running for a little while so the database is not empty. When you select the period over which you want the report to collect data, make sure it coincides with the times the product has been running.

### Step 1: Open Reporter and View Reports



1. From the Main Menu, select File, Insight DK Plus Reporter  
...or click the Report Icon
2. To view previously saved reports, from the Menu Bar, select File, Open, then highlight the report to display.

### Step 2: Create a Report Template

Before you can create a new report, you need to prepare a suitable report template, which is explained in these instructions. You also have the option to use a default template.



1. Within the Reporter, click on the Report Template icon  
...or select Set-up, Report Templates.

The first time the application is selected it will take a few seconds to open, thereafter the toggle between the two is immediate by means of the icons,



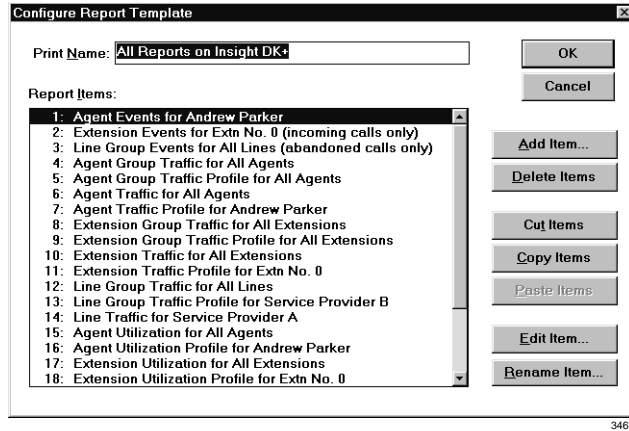
**Tip:** If you have to create a number of Report Items which need to be identical except for the device name it is best to create the first one and edit it. Next use the Copy Items and Paste Items buttons to create multiple copies of the report item and then edit each one in turn to change the device name.

2. From the Report Templates dialog box, type a new template name over the existing name.

The Change button turns into the Add button when you type a new template name. This is the template file name. (The name that appears on the printed report is entered in the next step.)

3. Click the Add... button, then enter the report title in the Print Name box.

- ◆ Click on Edit Item and use the drop-down lists and check boxes to define the parameters of the report item.



The name entered in the Print Name box is the name that will appear on the printed report.

When a new item is added to the Report Items list, it appears on the line above the one that is highlighted. The Cut, Copy and Paste Item buttons can be used to change the order of the report items so they are printed in the order you require.

...or click Delete, then highlight a template to delete.

4. Click OK.
5. Click Close.

### Step 3: Compile/Print the Report

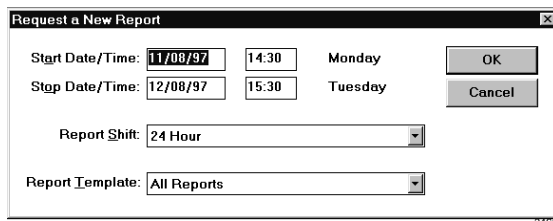
1. Click on the New icon



...or select File, New.

Select:

- ◆ The time period for the report to cover
- ◆ Report Shift
- ◆ A report template



The available Report Shifts are created from Configure Shift window. See [“Creating or Editing Shifts” on Page 13](#) for details.

2. Click OK and wait a few moments for your report to be compiled.

The report should be compiled in a few minutes. A sample report is shown below.

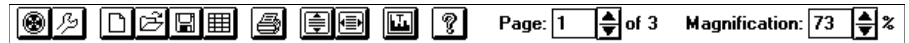
**Note** A number of report samples have been installed in the demonstration model to allow you to examine a report without having to run the demo for a long time.



- To view these reports click on the Open Report icon, icon on the toolbar in the Reporter.

On your newly compiled report, notice the header contains information such as the shift name, start and stop time and date, the creation date, site name and template name. Also shown is the number of pages, which is useful to know before printing a report.

The toolbar allows you to scroll through the pages and zoom into the details of the report using the magnification buttons. You can print the whole report or some selected pages.



On your report, notice the parameters which have exceeded your alarm thresholds appear in red. If the printer is not color, these are printed in bold type.

There are two main types of reports: Traffic and Event Reports. Traffic Reports provide information about a large proportion of the call center and are useful for spotting trends in work and areas for improvement.

Event Reports give detailed information about an individual or a group (of agents, lines, extensions or DIDs) and provide a valuable investigative tool to pinpoint a problem.

## inView LAN Displays

inView is the real time display feature that enables wallboard displays on PC monitors. It is a lower cost software module that displays selected parameters and status indications at desktops that do not need full display and reporting capabilities. The information is derived from the central Insight DK software.

### Wallboard Display



- From the menu, select View, Wallboard
- ...or click on the View Wallboard icon.

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### Status Display

The display can show either the Agent Group Status or Extension Group Status, you have the choice of which group is shown. The status is presented using a colored background to represent each agent's status.



- From the menu, select View, Agent Status
- ...or click on the Agent Status icon.

Agent: TeleSales		
Trevor Morgan	Ron Sloccombe	Alan Sinclair
Karen Green	Paul	David Hall
Paul Connelly	Peter Warren	Steve Croft
John Riley	Jenny Nichols	
David Wells	Tracey Curtis	
Adrian Garton	Jack Kennedy	

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- From the Status Display, you can select from the drop-down lists:
  - ◆ group type (Agent or Extension)
  - ◆ group

### ➤ Adding or Changing Parameters to the Wallboard

The wallboard display can contain up to eight parameters selected by the user at each desktop.



1. From the wallboard Edit Menu, select Edit Mode
2. ...or press the Edit Mode icon on the application toolbar.



3. From the Edit menu, select Add Parameter Window
- ...or click on the Add Parameter Window icon



CIQ  
2

...or right-click on the Parameter Window to edit.

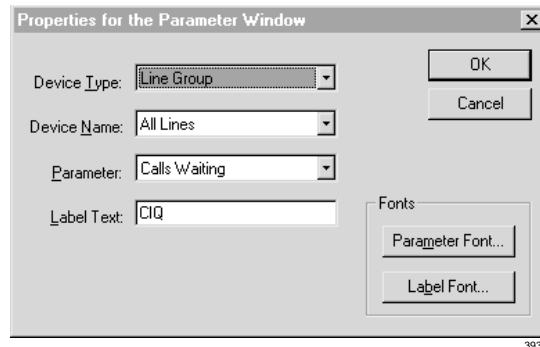


4. From the Properties for the Parameter Window, you can click on the down arrow next to:

- ◆ Device Type and click on an item (highlight it) from the drop-down listbox, such as Line, Extension, or DID group.
- ◆ Device Name to highlight one from the drop-down list.
- ◆ Parameter to display from the drop-down listbox.

The default label appears in Label Text. Enter a new name if you want to change the label.

5. Click OK.



This Parameter Window provides information on the selected device. For example, Grade of Service, Calls in Queue, Calls Answered, etc.

CIQ  
2

The wallboard Parameter Window now shows the specified information, such as the number of Call waiting. The label text is CIQ.

► To Customize the Status Display

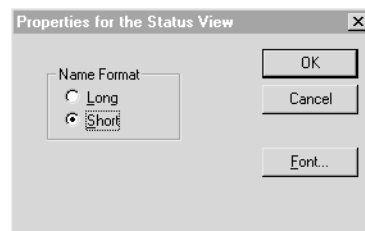
1. From the menu, select View, Agent Status

...or click on the Agent Status icon

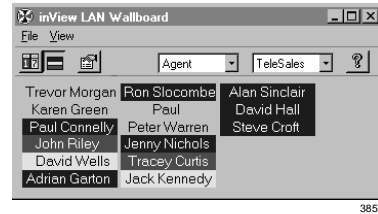
...or while in the Status View screen, right-click the mouse button over the display to open the Properties dialog for the Status View.

2. From the Properties for the Status View, you can:

- ◆ Select the Short Name Format



- ◆ Select the Long Name Format
- ◆ Change font of the Status View
- 3. Click OK.



## Pop-up on Message

If the inView client application is in the Wallboard View and the application has been minimized or put to the background, and an alarm threshold has been exceeded, then the inView LAN Wallboard is brought to the foreground if Pop-up on Message is ON. Any work in progress in another application, e.g. word processing is not interrupted.

- From the View menu, select Popup Alarm.

A check indicates this feature is ON.

## Always-on-top Option

You can specify that the inView LAN client application always remains on top of all other application windows, even when other applications are being used.

- From the View menu, select Always on Top.

A check indicates this feature is ON.

## Toolbar

The toolbar provides icons that perform the same functions as selecting menu items

- From the View menu, select Toolbar.

A check (ON) indicates the toolbar will display.

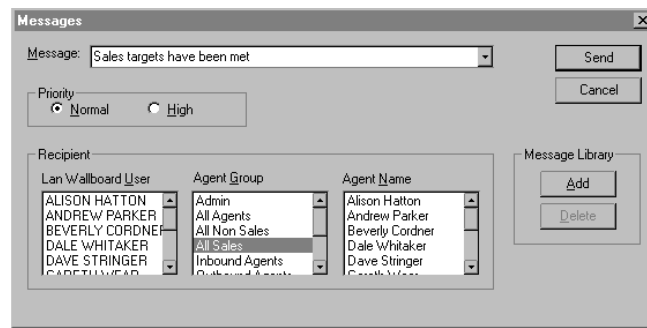
## Messages

You can send a message of up to 256 characters to any other inView User, Agent, or Agent Group, depending on their Message Access Level. You can store up to ten frequently used messages in a message library.



1. From the View menu, select Message  
...or from the Main toolbar, click the Message icon
2. Select a message from the drop-down list  
...or type a new one into the Message box.
3. (optional) Click ADD to add this message to the library.  
You can also Delete messages from the library.
4. Select one or more message recipient(s) from the three list boxes: LAN Wallboard User, Agent Group or Agent Name.
5. Press Send.

This loads the Messages dialog.



This sends the message to the recipient(s)

# External Wallboards (if you have a wallboard)

Wallboards can be extremely powerful management tools in a Call Center. The main function of wallboards is to provide performance statistics in real time to the agents operating the Call Center and thereby motivate them to improve their performance if necessary.

The information on the wallboard can be directed at individuals or groups. Up to six parameters from a choice of over 250 can be displayed at once and can be set to stay on the wallboard for a specified time before displaying the next set of parameters. In addition to parameters, the supervisor can send text messages to the wallboard, enabling easy distribution of important information. Audible alarms are available to alert staff to alarmed parameters and/or messages.

Wallboards are available as an option with Insight DK Plus. It is unlikely that you will have a wallboard with the demonstration system but this section shows how to configure a wallboard and is intended to give you some idea of the power and flexibility of wallboards. To appreciate this we suggest you look at the help file, where there is an illustrated guide on managing wallboards.

## Accessing Wallboard Help



1. From the Main Menu, select Help  
...or click the Help icon.
2. Click Help Index, then Managing Wallboards.

## Configuring Wallboards

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

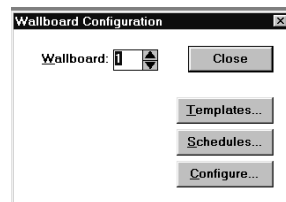
### Step 1: Select the Wallboard Serial Port

1. From the Main Menu, select Wallboards, Drivers.
2. Select the wallboard type and the com port.
3. Click OK.

### Step 4: Create a Wallboard Template

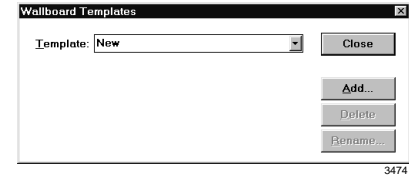
The second stage in setting up the wallboard is to define a template. You can create as many templates as you need to manage the wallboards. Each Insight DK Plus MIS workstation can drive up to six wallboards simultaneously, each one displaying different real time data.

1. From the Main Menu, select Wallboard, Configure.



2. Click Templates.
3. Type a new template name over the existing name.

The template defines what displays on the wallboard, including the position and types of real time parameters displayed, and the position and text of any associated labels. Templates can also define the contents of any scrolling messages.



**Tip:** When adding parameters and labels to a wallboard template, you have to define the position and width of these items on the wallboard display. To save time, use the Automatic Parameter Layout buttons. Just click on the appropriate button for 1, 2 and 4 parameters.

4. Select an insertion point in the drop-down list above where you want to add the new item.
5. Click Add Item.
6. Select the item type, click OK.
7. Click Edit Item to edit the newly inserted item.
8. Define the item by selecting the appropriate check boxes.
9. Click OK.

If you are adding a message to a template, this should be the only item contained in the template.

### Step 5: Create a Wallboard Schedule

Once a number of wallboard templates have been created and configured, you need to set a schedule that defines the display sequence of wallboard templates. The schedule defines the length of time each template displays before moving to the next one. When the the last template in the sequence has displayed, the sequence starts over.

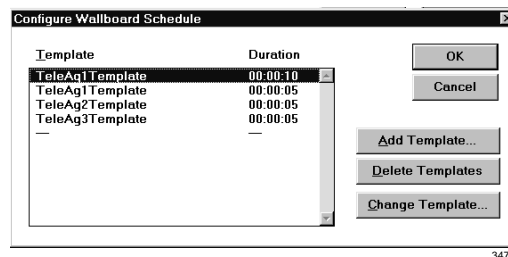
You can create as many wallboard schedules as you need to manage the wallboards connected to the Insight DK Plus MIS workstation. You can also configure a wallboard by attaching a series of wallboard schedules, each associated with a different shift.

Here is an example of three templates linked by a schedule. Each template displays for a specified time before switching to the next template. The display order can be changed in the schedule.



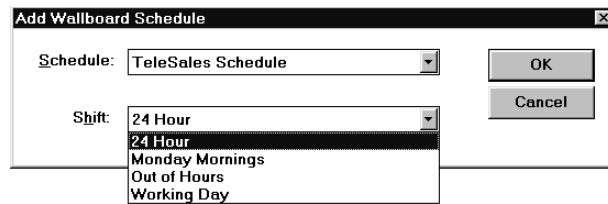
1. From the Main Menu, select Wallboards, Configure, then Schedules.
2. In the Wallboard Schedules window, type a new schedule name.
3. Click Add.
4. From Configure Wallboard Schedule window, click Add Template, then highlight one to add.
5. Enter the template display duration. Click OK.
6. Repeat Substeps 3~5 to add or delete other templates for scheduling.
7. When scheduling is complete, click OK, Close.
8. From the Wallboard Configuration window, click Configure.
- ♦ Delete any schedules that you do not need.
9. Check Fitted.

This creates a copy of the last selected schedule for you to change.



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

10. Click Add Schedule.
11. From the Add Wallboard Schedule window, click on Shift down arrow, select a shift from the drop-down list and click OK.
12. (Optional) Select an alarm to sound when the alarm threshold is reached.
13. Click OK.



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If a wallboard is attached to the demo kit, it displays pre-scheduled templates.

## Sending Temporary Wallboard Messages

Insight DK Plus enables you to send temporary messages to the wallboards. You can control the amount of time temporary messages display on wallboards before the scheduled displays resume.



1. Select Wallboard, Messages  
...or click the Messages icon.
2. Type your message or click the down arrow and highlight a message to use.
3. Enter the display time.
4. Select the wallboard to display the message, and whether it should beep on display.
5. Click Send Message, Close.
6. If you set the message to display for an indefinite amount of time, click Clear Message when you want to remove it.



**Tip:** You can queue up messages for display on a wallboard or series of wallboards using the above procedure. In this case you should click the Clear All Messages if you need to remove all the messages queued up on the wallboard(s).

