

# ***Strata***<sup>®</sup> **DK424**

Digital Business Telephone Systems

## **Insight DK Supervisor Guide**

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# Introduction

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This guide provides instructions for using the Strata DK Insight and Insight DK Plus Management Information System (MIS) for call centers. DK Insight and Insight DK Plus are compatible with the following Strata DK Systems:

- ♦ DK280 (Release 3.0 or higher) with the RCTUBA/BB, RCTUC/D, RCTUE/F processors
- ♦ DK424, with the RCTUBA/BB, RCTUC/D, RCTUE/F processors

## Organization

This guide is divided as follows:

- ♦ [Chapter 1 – The Grand Tour](#) covers the basic requirements for Insight DK and DK 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](#)

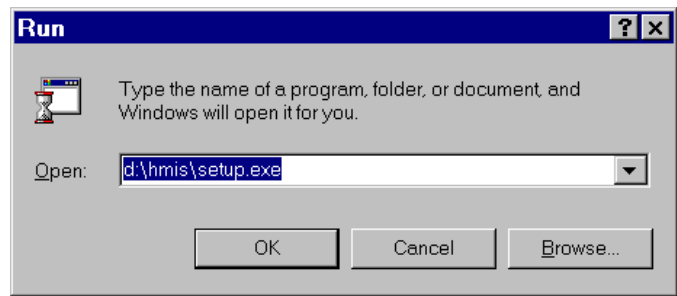
## Conventions

This guide uses these conventions:

### ► Denotes a procedure

- |  |  |
|--|--|
| 1. <i>Actions</i> you perform appear in this column. They can consist of either a single step or a series of numbered steps. | The <i>immediate response to the action</i> performed appears in this column. Additional notes and comments are also included. |
|--|--|

2. When the action you perform results in a screen, menu, dialog box, etc., the example to the right displays.



Letters in [brackets] represent buttons which have Directory Numbers on them. For example:

- [PDN] represents a Primary Directory Number (also known as an Extension Number for your telephone).
- [SDN] represents a Secondary appearance of a [PDN]. A [PDN] which appears on another telephone is considered an [SDN].
- [PhDN] represents a Phantom Directory Number button (an additional Directory Number).
- [DN] represents a Directory Number button (also known as an Extension or Intercom Number). Whenever [DN] is used in this guide, it means the user can use any [PDN], [SDN], or [PhDN].

**Extra bold** represents buttons on a telephone.

**Courier** shows a computer keyboard entry or screen display. “Type” indicates entry of a string of text. “Press” indicates entry of a single key. Example: Type **prog** then press **Enter**.

Times Roman words that are capitalized represent a specific dialog box button. For example: Transfer button.

“Click” means to press and then release the mouse button without moving the mouse.

~ means “through”

+ is used for multiple key entries.

➤ denotes the step in a one-step procedure.



represents an icon button on a feature toolbar. When you click on this icon, it achieves the same result as the step that it appears next to.

**Note** Elaborates specific items or references other information. Within some tables, unnumbered notes apply to the entire table and numbered notes apply to specific items.

**Important!** *Calls attention to important instructions or information.*

---

**CAUTION!** Advises you that hardware, software applications or data could be damaged if the instructions are not followed closely.

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## Related Documents/Media

Refer to the following documents for more information:

- ♦ **Strata DK Call Center Solutions – Chapters 3~5** provide an overview of the Insight DK and Insight DK Plus Management Information System (MIS). It summarizes the differences between the Insight DK and DK Plus. It also provides examples of various PBX/MIS configurations, including some with wallboards, backup servers, and sub-clients.
- ♦ **Insight DK inView Quick Reference Guide** provides instructions for viewing and customizing the on-screen wallboard and large character views of the real time call center data.
- ♦ **Insight DK Installation Guide** explains how to set up the network, install the server software, install clients and explains how the data files are organized.
- ♦ **Insight DK CD-ROM** which includes training, all Insight DK documentation, Insight DK software and the upgrade to Insight DK Plus, and Demo software.
- ♦ **Strata DK Library CD-ROM** enables you to view, print, navigate and search publications for Strata DK14, DK40 and DK424 digital business telephone systems. It also includes Strata DK424 ACD Documentation, including the *Call Center Solutions General Description*, *ACD Agent Guide*, *ACD Supervisor's Guide*. ACD Installation and Programming instructions are included in the *Strata DK Installation and Maintenance Manual* and *Programming Manual*.





This chapter explains how to use the Strata Insight DK and Insight DK Plus MIS features.

## Before You Begin

Strata Insight DK and Insight DK Plus require the following:

### Hardware

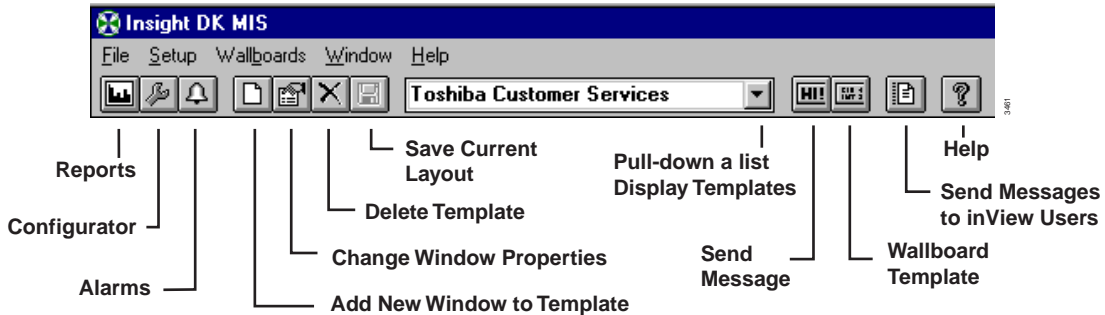
- ♦ Pentium PC running at 133 MHz or higher
- ♦ 16 MB memory (32 MBs preferred)
- ♦ Hard Disk with capacity to store data records (1.6 GB minimum). Program memory will use approximately 10 MBs.
- ♦ SVGA monitor
- ♦ 1 parallel port and 2 serial ports – must have unique Interrupt Requests (IRQs) available

### Software

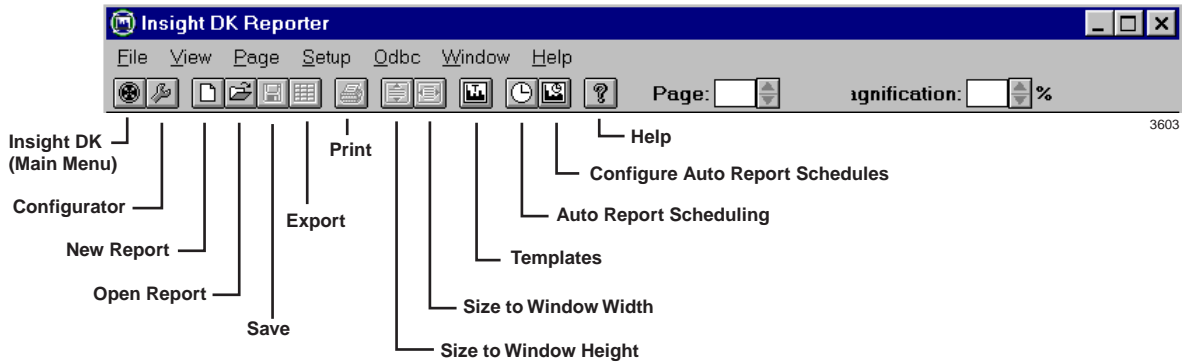
- ♦ Microsoft® Windows® 95, Windows 98, Windows NT® 4.0 or higher
- ♦ Windows 95 version 4.00.950, a, b, or c. Right click on My Computer, select Properties. Listed under system will be the operating system Window 95.
- ♦ Or, use Windows NT 4.00.1381 (must install Service Pack 3 (SP3), available from Microsoft).
- ♦ Uses pcAnywhere® V8.0 for remote software access

## Main Menu and Tool Bars

The Insight DK Main Menu provides access to all of its features. The software is presented in a Windows format, which is easy to use. The following shows the Main Menu items and icons.



When you click on the Reports Icon, the Reporter Toolbar appears (shown below).



## Online Help



You can access online help with specific help on virtually any window of Insight DK and DK Plus. Click on the help icon to view definitions and instructions.

This chapter covers setting up and interpreting Real Time Displays. These displays provide immediate feedback on the activity on 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 DK supports four templates, while the Insight DK plus has an unlimited number of templates.

## Creating 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.

**Note** Table 1 describes all of the displays available with Insight DK Plus. Insight DK provides a subset of these displays, shown in **bold**.

Table 1 Available Displays

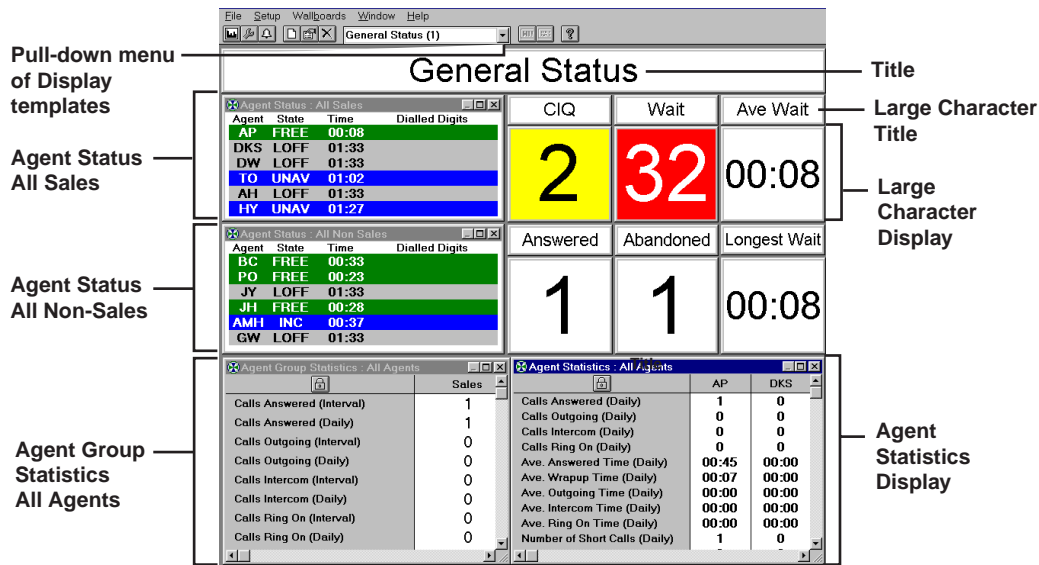
Display	Available for:	Shows
Status Displays	<ul style="list-style-type: none"><li>• <b>Agents</b></li><li>• <b>Extensions</b></li><li>• <b>Lines</b></li></ul>	Name/Number, Associated Name/Number, connected to location and status.
Statistic Displays	<ul style="list-style-type: none"><li>• Agents</li><li>• Extensions</li><li>• Lines</li><li>• DID</li><li>• <b>Agent Groups</b></li><li>• <b>Ext. Groups</b></li><li>• <b>Line Groups</b></li><li>• <b>DID Groups</b></li></ul>	Each row displays selected parameters and each column represent each individual or group.
Graphical Displays – Calls Waiting	<ul style="list-style-type: none"><li>• Agent Groups</li><li>• Ext. Groups</li><li>• Line Groups</li><li>• DID Groups</li><li>• DIDs</li></ul>	A bar represents either a group or a DID number. The length of the bar show the number of calls waiting.

Table 1 Available Displays (continued)

Display	Available for:	Shows
<b>Graphical Displays – Wait Time</b>	<ul style="list-style-type: none"> <li>• Agent Groups</li> <li>• Ext. Groups</li> <li>• Line Groups</li> <li>• DID Groups</li> <li>• DIDs</li> </ul>	A bar represents either a group or a DID number. The length of the bar show the number of seconds for the longest call waiting.
<b>Large Character Displays</b>	<ul style="list-style-type: none"> <li>• Agents</li> <li>• DIDs</li> <li>• Extensions</li> <li>• Lines</li> <li>• Agent Groups</li> <li>• DID Groups</li> <li>• Ext. Groups</li> <li>• Line Groups</li> </ul>	Each display shows the selected parameter from the device being monitored. A Large Character Display can also be defined as a label for placing titles on the screen.

### 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.



### Indication Colors

On a color monitor, the above windows will show the status of agents and/or devices. Insight DK 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.
Grey	Device logged off	

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 a new Agent Status Window



1. From the Window menu, click on the New icon.
2. From the Agent Status, select Agent Status, click OK.

Agent	State	Time
TO	UNAV	08:41
AH	UNAV	04:11
HY	UNAV	09:06
AP	FREE	01:18
DKS	FREE	01:13
DW	FREE	00:34
BC	FREE	01:37
PO	FREE	01:14

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### Configure the Agent Status Window



1. Right click on the Agent Status window  
...or click the Properties for Agent Status Window icon.

Properties for the Agent Status Window

Agent Group: Outbound Agents

Show Agent Information:  Number  Name  Group Name

Agent Name Format:  Short  Long

Show Extension Information:  Number  Name  Group Name

Extn Name Format:  Short  Long

Show Connected To Information:  Number  Name  Group Name

Connected To Name Format:  Short  Long

Show Extension in Preference to Agent

Show Line in Preference to DDI

Show Call Details:  Dialed Digits

Display Mode:  Rows  Columns

OK Cancel

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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 options 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. (Requires RKYS4 key).
  - ◆ Select Rows or Columns. Show additional agents in columns, using the horizontal scroll bar. Or, to show rows, use the vertical scroll bar.
3. Click OK when done.

## Real Time Statistics

Statistics can be presented as:

- ◆ **Interval Call Statistics** in which you set the length of time (from 1~1140 minutes) that the calculations should cover.
- ◆ **Daily Call Statistics**, which are based on shift schedules. The counter is reset to zero at the beginning of each shift.

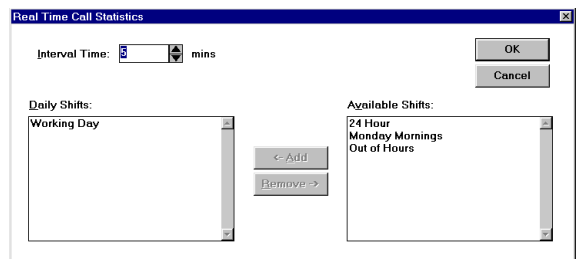
The parameters for Interval and Daily Call Statistics are defined under Setup, Realtime Stats.

Statistical Thresholds and Alarm Thresholds are established in the Configurator. Interval Time periods and Daily Shifts which have already been created can be added or removed for calculation purposes from the Setup menu.

### Setting Real Time Stats

Access Real Time Stats 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. Click Setup, Real Time Stats.



2. Add new shifts by highlighting a shift from the Available Shift, then click Add

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.

...or remove shifts by highlighting the shift(s), then click Remove.

## Agent Statistics

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

### Create a new Agent Statistics Window



1. From the Window menu, click on the New icon.
2. Select Agent Statistics, click OK.

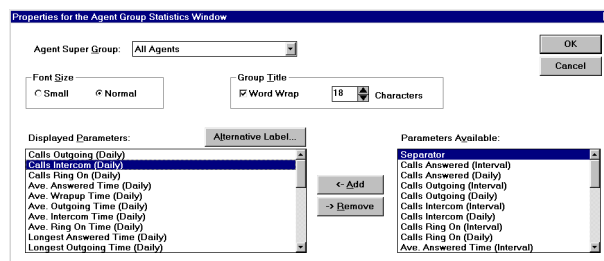
	Sales	Support	Admin	Tele Sales
Calls Answered (Daily)	261	234	236	0
Calls Outgoing (Daily)	0	0	0	0
Calls Intercom (Daily)	0	0	0	0
Calls Ring On (Daily)	0	0	0	0
Ave. Answered Time (Daily)	01:31	01:20	01:32	00:00
Ave. Wrapup Time (Daily)	00:08	00:10	00:11	00:00
Ave. Outgoing Time (Daily)	00:00	00:00	00:00	00:00
Ave. Intercom Time (Daily)	00:00	00:00	00:00	00:00
Ave. Ring On Time (Daily)	00:00	00:00	00:00	00:00
Longest Answered Time (Daily)	02:23	02:13	02:05	00:00
Longest Outgoing Time (Daily)	00:00	00:00	00:00	00:00
Number of Short Calls (Daily)	27	52	27	0
Number of Long Calls (Daily)	26	26	26	0
G.O.S. (Daily)	79.7	66.7	77.5	100.0
Calls Answered (Interval)	0	0	2	0
Calls Outgoing (Interval)	0	0	0	0
Calls Intercom (Interval)	0	0	0	0
Calls Ring On (Interval)	0	0	0	0
Ave. Answered Time (Interval)	00:00	00:00	01:09	00:00
Ave. Wrapup Time (Interval)	00:00	00:00	00:06	00:00
Ave. Outgoing Time (Interval)	00:00	00:00	00:00	00:00
Ave. Intercom Time (Interval)	00:00	00:00	00:00	00:00
Ave. Ring On Time (Interval)	00:00	00:00	00:00	00:00
Longest Answered Time (Interval)	00:00	00:00	01:24	00:00
Longest Outgoing Time (Interval)	00:00	00:00	00:00	00:00
Number of Short Calls (Interval)	0	0	1	0
Number of Long Calls (Interval)	0	0	0	0
G.O.S. (Interval)	100.0	100.0	50.0	100.0

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After creating the Agent Statistics window, you can go to the Properties for the Agent Statistics Window to configure this display.

### Configure the Agent Statistics Window

1. Right click on the Agent Statistics window.



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2. From the Properties for Agent Group Statistics window, enter or select:

- ◆ Agent Super Group
- ◆ Font Size
- ◆ Agent Name Format
- ◆ Select Displayed Parameters, click Add or Remove ...or select a Parameter and click Alternative Label to rename it.



- ◆ (Optional) Use the lock button to toggle the Agent Statistics window between two display modes.

3. Click OK.

Button ON (pressed): Displays the single agent that was left most in the window before the lock button was pressed. The horizontal scroll bar is removed.

Button 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 created in the work space area of the Insight DK MIS application window.

Each wait time bar graph window shows the wait time for the longest waiting call currently queued on a series of line groups, DID numbers, DID groups, extension groups or agent 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.

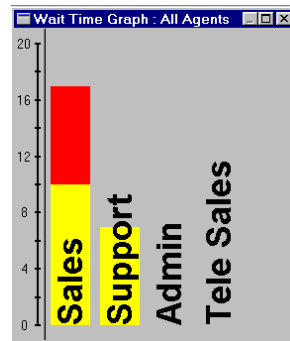
### Create a Wait Time Graph Window



1. Click the New icon.
2. Select Wait Time Graph from the drop down list.



3. Click OK.



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 Properties for the Wait Time Graph

1. Right click on the Wait Time Graph that you wish to change.
2. Select the desired Wait Time Graph, then choose Properties.

3. Select the Name of the Device that you wish to monitor the members of.
4. Select the graph orientation (horizontal or vertical).
5. Enter a bar Height/Width (define the bar sizes in pixels).
6. Enter a Bar Separation (define spacing between bars in pixels).

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.

## Real Time Displays

### Calls in Queue Graph (Insight DK Plus only)

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

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.

## Calls in Queue Graph (Insight DK Plus only)

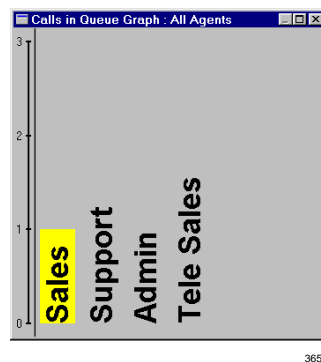
Each Calls in Queue Graph window displays bar graphs of the number of calls currently queued on a series of line groups, DID numbers, DID groups, extension groups or agent groups. This graph displays real time data and can be placed in the composite real time display area.

The graphs are in color 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. The red bar also shows how many calls are exceeding the alarm threshold.

### Creating Calls in Queue Graph



1. Click on the New icon
2. Select Calls In Queue Graph from the drop down list.
3. Click OK.



You can configure the contents of this window (see following instructions) to adjust the size and position of the window.

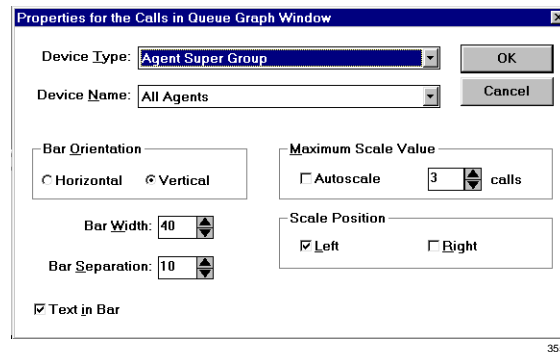
## Configuring the Calls in Queue Graph

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 icon.
2. From the New Real Time window, select Calls in Queue Graph from the drop down list.
3. Right click on the Calls in Queue Graph Window that you wish to configure.

The New Real Time Window displays.



4. From the Properties for the Calls in Queue Window, select the Name of the Device that you wish to monitor the members of.
5. Select the graph orientation (horizontal or vertical).
6. Enter a bar Height/Width (define the bar sizes in pixels).
7. Enter a Bar Separation (define spacing between bars in pixels).
8. Check the Text In Bar box to display text labels within the bars.

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.

## 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

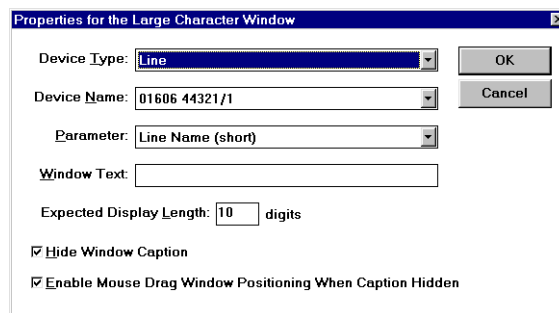


1. From the Window menu, click on the New icon.
2. In the New Real Time Window box, select Large Character, click OK.

A large character window appears.

### Configure a Large Character Window

1. Right click on the large character window that you wish to configure.



The dialog box titled "Properties for the Large Character Window" contains the following fields and options:

- Device Type: Line (dropdown menu)
- Device Name: 01606 44321/1 (text field)
- Parameter: Line Name (short) (dropdown menu)
- Window Text: (empty text field)
- Expected Display Length: 10 digits (text field)
- Hide Window Caption
- Enable Mouse Drag Window Positioning When Caption Hidden

Buttons: OK, Cancel

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2. From the Properties for Large Character Window, enter or select:

- ◆ Device Type
- ◆ Device Name
- ◆ Parameter
- ◆ Window Text
- ◆ Expected Display Length digits
- ◆ (Optional) Hide Window Caption

If you chose Device Type <None>, then enter Window Text that you wish to display.

(See Device Type.)

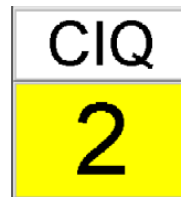
To minimize font size switching within the window, enter the Expected Display Length digits.

- ◆ (Optional) Check Mouse Drag Window Positioning When Caption Hidden
- 3. Click OK when done.

This option enables you to move the large character window when the window caption is hidden.

## Duplicate a Large Character Window

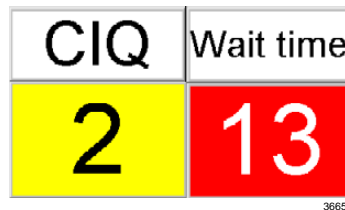
1. Click on the Large Character window to duplicate.



2. Click the New icon and enter information ([Substep 2](#), “Configure a Large Character Window”).
3. Click OK.



A data window appears.



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

**Real Time Displays**

*Large Character Window*

This chapter provides an in-depth look at of the Insight DK 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 DK Plus, which enables exporting data that can be imported into spreadsheet programs, such as Microsoft Excel®.

## Overview

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 DK, including Lines, Agents, Extensions, Agent Queue Groups and DID Numbers.

While Insight DK is running, all monitored telephone traffic is logged to the hard disk for analysis by the 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 reports 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.

Reports can be collated with respect to any number of definable weekly 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.

Insight DK and Insight DK Plus support Traffic and Event Reports.

- ♦ **Traffic Reports** provide general information on 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, DIDs) and provide a valuable investigative tool to pinpoint a problem.

# 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 “[Report Terminology](#)” on [Page 55](#) of the Glossary.

## Devices

Insight DK refers to lines, DIDs, 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**

<b>Lines</b>	In the context of Insight DK, a line represents either one of your external trunks or tie lines connected to the Strata DK 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 DK does not report real time status of outgoing calls placed over the monitored lines.
<b>DNIS/DIDs</b>	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 DK has been programmed. If configured correctly, Insight DK can monitor in real time and historically the activity of inbound calls associated with DNIS/DID numbers.
<b>Extensions</b>	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. Within the Strata DK 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.
<b>Agents</b>	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 DK to give meaningful statistics concerning the activity of individual agents.
<b>Account Codes</b>	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 DK only reports the first two digits to Insight DK for reporting. The Strata DK allows up to 100 account code 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 next section.

**Note** Table 3 describes all of the reports available through Insight DK Plus. Insight DK provides a subset of these reports, shown in **bold**.

**Table 3 Available Reports**

Report Type:	Available for:	Shows:	Uses:
Event Reports	<ul style="list-style-type: none"> <li>Agents</li> <li>Extensions</li> <li>Line Groups</li> </ul>	Each event shown per line with important information.	Provides a step-by-step account of what is occurring on a particular device.
Traffic Reports	<ul style="list-style-type: none"> <li><b>Agents</b></li> <li>Extensions</li> <li>Lines</li> </ul>	Each device is shown per line with call statistics presented in columnar format.	Traffic Reports are designed to give an overview of activity and performance of all members of a group.
Group Traffic Reports	<ul style="list-style-type: none"> <li><b>Agent Groups</b></li> <li><b>DID Groups</b></li> <li>Ext. Groups</li> <li><b>Line Groups</b></li> </ul>	Each line reports call statistics and performance. Each group of the super group are displayed in a side-by-side columnar format.	Group Traffic Reports are designed to give an overview and comparison of activity and performance against certain parameters.
Traffic Profile Reports	<ul style="list-style-type: none"> <li>Agents</li> <li>Extensions</li> </ul>	Each line reports a time period with call statistics for a particular device reported in a columnar format.	Shows activity of particular device for selected performance parameters.
Group Traffic Profile Reports	<ul style="list-style-type: none"> <li>Agent Groups</li> <li><b>DID Groups</b></li> <li>Ext. Groups</li> <li><b>Line Groups</b></li> </ul>	Each line reports call statistics for a particular group reported over a profile time period.	Shows peak and quiet times for a particular group.
Utilization Reports	<ul style="list-style-type: none"> <li><b>Agents</b></li> <li>Extensions</li> </ul>	Each line reports a particular device with statistics displayed as the percentage of time involved in a given activity in a columnar format.	Utilization Reports can be used to see how the resources in a particular group are being used.
Utilization Profile Reports	<ul style="list-style-type: none"> <li><b>Agents</b></li> <li>Extensions</li> </ul>	Each line reports a time period with statistics displayed as a percentage of time in a given activity in a columnar format.	Utilization Profile reports show the peaks and valleys of a selected device over the selected time periods.
Contention Reports	<ul style="list-style-type: none"> <li>Agents</li> <li>Extensions</li> <li>Lines</li> </ul>	Each line shows a number of idle devices and each group in a columnar format.	Contention Reports are used to show the amount of time (%) a line or agent is free over the reporting period.
Contention Profile Reports	<ul style="list-style-type: none"> <li>Agents</li> <li>Extensions</li> <li>Lines</li> </ul>	Each line shows a number of idle devices and time profiles in a columnar format.	Contention Profiles provide a view when devices are busiest over the period defined.
Wait Time Distribution Reports	<ul style="list-style-type: none"> <li><b>DIDs</b></li> <li><b>DID Groups</b></li> <li><b>Lines</b></li> </ul>	Each line reports a time period for the groups shown in a columnar format.	Wait Time Distribution Reports are used to profile the times into a chart.
Wrap-up Time Distribution Reports	<ul style="list-style-type: none"> <li>Agents</li> <li>Agent Groups</li> </ul>	Each line reports a time period for the groups shown in a columnar format.	Wait Time Distribution Reports are used to profile the times into a chart.

**Table 3 Available Reports** (continued)

Report Type:	Available for:	Shows:	Uses:
Call Time Distribution Reports	<ul style="list-style-type: none"> <li>• Agents</li> <li>• DIDs</li> <li>• Extensions</li> <li>• Lines</li> <li>• Agent Groups</li> <li>• DID Groups</li> <li>• Ext. Groups</li> <li>• Line Groups</li> </ul>	Each line reports a time period for the groups shown in a columnar format.	Wait Time Distribution Reports are used to profile the times into a chart.
Account Code Reports	<ul style="list-style-type: none"> <li>• <b>Acct Code Groups</b></li> </ul>	Each line reports the statistics for an account code number.	Account Code Reports present information relating t the purpose of the call as defined by the user.
Forecast Reports	<ul style="list-style-type: none"> <li>• Standard</li> <li>• Profile</li> </ul>	Each report shows the original data for the period and modified data.	The report can be either a profile or standard report.

## 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. [Table 4](#) shows the filter elements that are supported:

**Table 4 Report Filters**

Filter	Only accepts calls that were:
<b>Line</b>	connected to a specific line.
<b>DID</b>	associated with a specific DID number.
<b>Extension</b>	connected to a specific extension.
<b>Agent</b>	connected to a specific agent.
<b>Account Code</b>	attached to a specific account code
<b>Line Group</b>	connected to lines within a specified line group.
<b>DID Group</b>	associated with DID numbers within a specified DID group.
<b>Extension Group</b>	connected to extensions within a specified extension group.
<b>Agent Group</b>	connected to agents within a specified agent group.
<b>Account Code Group</b>	attached to a specified within an account code group with account codes.
<b>Extension Queue Group</b>	inbound and that were finally queued to a specific extension group corresponding to the Strata DK (EG501 ~ EG516).
<b>Agent Queue Group</b>	inbound and finally queued to a specific agent group corresponding to the Strata DK (AG501 ~ AG516).

Table 4 Report Filters (continued)

Filter	Only accepts calls that were:
<b>Dialed Digits (requires Open Architecture Interface (OAI) Port)</b>	with inbound/outbound dialed digits that match a specified string.  <b>Note</b> 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 created, the final step is to create a schedule to create and print the information. This scheduling is totally optional for the user.

## Reports

Having established the type of report you need, use this section to help choose exactly the right report for your needs. This section includes a list of the available report items that can be included in a report template for your reference.

### 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 will occur 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.

The types of events and call types supported are shown in [Table 5](#).

**Table 5 Recorded Call Events**

<b>Events Recorded:</b>	<b>Agent</b>	<b>Ext.</b>	<b>Line Group</b>
Log on	X	X	
Log off	X	X	
Wrap-up	X	X	
Unavailable	X	X	
Available	X	X	
Call Ringing	X	X	X
Answers Call	X	X	
Outgoing Call	X	X	X
Internal Call	X	X	
Abandoned Call			X
Other Information Included:			
Name/Number	X	X	X
Name/Number DID			X
Date/Time	X	X	X
Call Duration	X	X	X
Ring Time	X	X	X
Talk Time	X	X	X
Call Time (includes talk, held, and wrap-up time)	X	X	X
Wrap-up Time	X	X	
Connected Device	X	X	X
ANI Digits	X	X	X
Account Codes	X	X	

## Traffic Reports for Agents or Extensions

There are four different report types available on the Insight DK 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 will occur 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 1 minute up to 999 weeks.

The report is presented in a time band per row format. Pagination of the report will occur 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 will occur 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 1 minute up to 999 weeks.

The report is presented in a time band per column format. Pagination of the report will occur 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.

Table 6 shows the parameters available for individual agent or extension reports:

**Table 6 Parameters for Agent or Extension Reports**

Parameter	Agent	Ext.	Agent Profile	Ext. Profile
Number Calls Handled	X	X	X	X
Total Handling Time	X		X	
Avg. Handling Time	X	X	X	X
% Time Agent Busy on Handled Calls	X	X	X	X
Calls per Hour for Logged In Period	X			
Call Rates per Hour	X			
Number of Answered Calls per Hour	X			
Total Time of Incoming Calls	X		X	
Avg. Time of Incoming Calls	X	X	X	X
Total Talk Time of Incoming Calls	X		X	
Avg. Talk Time of Incoming Calls	X	X	X	X
Number of Incoming Calls Answered	X	X	X	X
Total Wrap-up Time	X		X	
Avg. Wrap-up Time	X	X	X	X
Number of Transferred-in Calls	X	X	X	X
Number of Transferred-out Calls	X	X	X	X
Number of Calls Held	X	X	X	X
Total Holding Time	X		X	
Avg. Holding Time	X	X	X	X
Number of RNA Calls	X	X	X	X
Total Ringing Time of RNA Calls	X		X	
Avg. Ringing Time of RNA Calls	X	X	X	X
Number of Internal Calls		X	X	X
Total Call Time* Internal Calls	X		X	
Avg. Call Time* Internal Calls	X	X	X	X
Number of Internal Calls per Hour	X		X	
Number of Outgoing Calls	X	X	X	X
Total Call Time* for Outgoing Calls	X		X	
Avg. Call Time* for Outgoing Calls	X	X	X	X
Total Talk Time for Outgoing Calls	X			
Avg. Talk Time for Outgoing Calls	X			
Number Outgoing Calls per Hour	X			
Number of Short Calls	X	X	X	X
Number of Long Calls	X	X	X	X
GOS – % Calls within Long/Short Criteria	X	X	X	X
Number of Log On Events	X	X	X	X
% Logon during the Period	X	X	X	X
Number of Unavailable Events	X	X	X	X
% Unavailable during the Period	X	X	X	X

The parameters available for agent or extension group reports are shown in [Table 7](#):

**Table 7 Parameters for Agent or Extension Group Reports**

Parameter	Agent Group	Ext. Group	Agent Group Profile	Ext. Group Profile
Number Incoming Calls Answered	X	X	X	X
Total Call Time* Answered Calls	X		X	
Avg. Call Time* Answered Calls	X	X	X	X
Longest Call Time* Answered Calls	X	X	X	X
Total Talk Time	X		X	
Avg. Talk Time	X		X	
Longest Talk Time	X		X	
Number of Internal Calls Answered	X	X	X	X
Total Call Time* Internal Calls	X		X	
Avg. Call Time* Internal Calls	X	X	X	X
Longest Call Time* Internal Calls	X	X	X	X
Number of Outgoing Calls	X	X	X	X
Total Call Time* Outgoing Calls	X		X	
Avg. Call Time* Outgoing Calls	X	X	X	X
Total Talk Time Outgoing Calls	X		X	
Avg. Talk Time Outgoing Calls	X		X	
Longest Call Time* Outgoing Calls	X	X	X	X
Longest Talk Time Outgoing Calls	X		X	
Total Wrap-up Time	X		X	
Avg. Wrap-up Time	X	X	X	X
Longest Wrap-up Time	X	X	X	X
Number of Transferred-in Calls	X	X	X	X
Number of Transferred-out Calls	X	X	X	X
Number of Calls Held	X	X	X	X
Total Holding Time	X		X	
Avg. Holding Time	X	X	X	X
Longest Holding Time	X	X	X	X
Number of RNA Calls	X	X	X	X
Total Ringing Time of RNA Calls	X		X	
Avg. Ringing Time of RNA Calls	X	X	X	X
Longest RNA Time		X	X	X
Number of Short Calls	X	X	X	X
Number of Long Calls	X	X	X	X
GOS – % Calls within Long/Short Criteria	X	X	X	X

## Traffic Reports for Lines or DNIS/DID Numbers

There are four different report types available on Insight DK 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.
- ✦ **DID Traffic Profile Report** – provides a profile of traffic information for an individual DID over a number of time periods.
- ✦ **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”.
- ✦ **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.

For each of these reports, to configure the statistics analysis thresholds that control the calculation of GOS refer to “Configuring DID groups or Configuring lines” in the help file.

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 will occur 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.

A DID traffic profile report provides historical call statistics data for a selected DID number presented in a series of uniform time bands. The interval time governing the time bands can be anything from 1 minute up to 999 weeks. The report is presented in a time band per column format.

Pagination of the report will occur 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.

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 will occur 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.

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 1 minute up to 999 weeks. The report is presented in a time band per column format. Pagination of the report will occur 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.



The parameters available for Line or DNIS/DID reports are shown in [Table 8](#):

**Table 8 Parameters for Line or DNIS/DID Reports**

Parameter	Line	DID	DID Profile
Number of Calls Handled	X		
Total Call Time – Handled Calls	X		
Avg. Call Time – Handled Calls	X		
Number of Calls exceeding Wait Time – All Calls		X	X
GOS – All Calls		X	X
% Time on Call during Shift	X		
Number of Calls Offered (Incoming)	X	X	X
Number of Calls Answered	X	X	X
Total Call Time* -- Answered Calls	X	X	X
Avg. Call Time* -- Answered Calls	X	X	X
Total Talk Time – Answered Calls	X	X	X
Avg. Talk Time – Answered Calls	X	X	X
Total Waiting Time -- Answered Calls	X	X	X
Avg. Waiting Time -- Answered Calls	X	X	X
Longest Call Time* -- Answered Calls		X	X
Longest Talk Time -- Answered Calls		X	X
Longest Waiting Time -- Answered Calls		X	X
Number of Outgoing Calls	X		
Total Call Time* -- Outgoing Calls	X		
Avg. Call Time* -- Outgoing Calls	X		
Total Talk Time – Outgoing Calls	X		
Avg. Talk Time – Outgoing Calls	X		
Number of Held Calls	X	X	X
Total Hold Time	X	X	X
Avg. Hold Time	X	X	X
Longest Holding Time		X	X
Number of Transferred Calls		X	X
Avg. Number of Transfers per Trans. Call		X	X
Total of all Transferred Calls		X	X
Number of Calls Abandoned	X	X	X
% Calls Abandoned		X	
Total Waiting Time – Abandoned Calls	X	X	X
Avg. Waiting Time -- Abandoned Calls	X	X	X
Number of Calls exceeding Wait Time – Abandoned Calls		X	X
Longest Waiting Time -- Abandoned Calls		X	X
GOS – Abandoned Calls		X	X
Target Answer Time		X	X
Erlangs of Traffic		X	X

The parameters available for Line or DNIS/DID group reports are shown in [Table 9](#):

**Table 9 Parameters for Line and DNIS/DID Group Reports**

Parameter	Line Group	DID Group	Line Group Profile	DID Group Profile
Number of Calls Offered (Incoming)	X	X	X	X
Number of Calls Answered	X	X	X	X
Total Call Time* -- Answered Calls	X	X	X	X
Avg. Call Time* -- Answered Calls	X	X	X	X
Total Talk Time – Answered Calls	X	X	X	X
Avg. Talk Time – Answered Calls	X	X	X	X
Total Waiting Time -- Answered Calls	X	X	X	X
Avg. Waiting Time -- Answered Calls	X	X	X	X
Longest Call Time* -- Answered Calls	X	X	X	X
Longest Talk Time -- Answered Calls	X	X	X	X
Longest Waiting Time -- Answered Calls	X	X	X	X
Number of Calls exceeding Wait Time – All Calls	X	X	X	X
GOS – All Calls	X	X	X	X
Number of Calls Abandoned	X	X	X	X
% Calls Abandoned	X	X	X	X
Total Waiting Time -- Abandoned Calls	X	X	X	X
Avg. Waiting Time -- Abandoned Calls	X	X	X	X
Longest Waiting Time -- Abandoned Calls	X	X	X	X
Number of Calls exceeding Wait Time – Abandoned Calls	X	X	X	X
GOS – Abandoned Calls	X	X	X	X
Number of Outgoing Calls	X		X	
Total Call Time* -- Outgoing Calls	X		X	
Avg. Call Time* -- Outgoing Calls	X		X	
Longest Call Time* -- Outgoing Calls	X		X	
Total Talk Time – Outgoing Calls	X		X	
Avg. Talk Time – Outgoing Calls	X		X	
Longest Talk Time – Outgoing Calls	X		X	
Number of Held Calls	X	X	X	X
Total Hold Time	X	X	X	X
Avg. Hold Time	X	X	X	X
Longest Holding Time	X	X	X	X
Number of Transferred Calls	X	X	X	X
Avg. Number of Transfers per Trans. Call	X	X	X	X
Total of all Transferred Calls	X	X	X	X
Target Answer Time	X	X	X	X
Erlangs of Traffic	X	X	X	X

## 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 will occur 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 the 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 1 minute up to 999 weeks. The report is presented in a time band per column format. Pagination of the report will occur 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 are shown as a percentage normalized to the shift that you collated the report with.

The parameters for Utilization reports are shown in [Table 10](#).

**Table 10 Utilization Report Parameters**

Parameter	Agent	Ext.	Agent Profile	Ext. Profile
Time Handling Incoming Calls	X	X	X	X
Time Handling Outgoing Calls	X	X	X	X
Time Handling Internal Calls	X	X	X	X
Time Incoming Calls Held	X	X	X	X
Time Outgoing Calls Held	X	X	X	X
Time Internal Calls Held	X	X	X	X
Time in Wrap-up	X	X	X	X
Time Unavailable	X	X	X	X
Time Busy	X	X	X	X
Time Free	X	X	X	X
Time Ringing Incoming Calls	X	X	X	X
Time Ringing Internal Calls	X	X	X	X
Time Logged On	X	X	X	X
Time Logged Off	X	X	X	X

## Contention Reports (Insight DK 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 will occur 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 will occur 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.

## Wait Time Distribution Report

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 of either answered or abandoned calls or both together if required. A series of either line groups, DID numbers or DID groups can be analyzed within a single report.

The report is presented in a wait time band per row format. Pagination of the report will occur 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.

## Account Code Report

An account code traffic report provides historical call statistics data for each account code within a selected account code group. The call statistics parameters available are as follows:

- ♦ Total number of calls for each account code (this is a summation of the selected call categories within the report).
- ♦ Average handling time of these calls.
- ♦ Number of incoming calls that were answered for each account code.
- ♦ Average call time of these answered calls (this includes wrap-up time).
- ♦ Number of incoming calls that were transferred from another extension/agent for each account code.
- ♦ Number of incoming calls that were transferred to another extension/agent for each account code.
- ♦ Number of incoming calls that were placed on inquiry hold for each account code.

- ♦ Average holding time of these held calls.
- ♦ Number of internal/intercom calls for each account code.
- ♦ Average call time of these intercom calls.
- ♦ Number of outgoing calls for each account code.
- ♦ Average call time of these outgoing calls.

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 will occur 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.

## Using MIS Reports to Improve Performance

Now that you are able to create report templates to provide you with the reports for the periods of interest what do they all mean? 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 too many abandoned calls and complaints of long waits. Here are some solutions to this problem:

#### Solution A

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 in this area. Avoid repeating the same message over and over and consider playing music or other recorded information between greetings.

#### Solution B

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

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

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 DK. This speeds up the call process and reduces noise and stress in the call center.

#### Solution E

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**

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

### **Solution B**

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**

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 allow you to answer more calls with the same number of lines and people. Call duration can be 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. Maybe when you look at this person you may consider training your staff to the performance level of this best person.

### **Solution D**

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 where an order was placed took over ten minutes because the sales agent had to print off an order confirmation and take it to the mail room for processing. Now the printer is located in the mail room and wrap-up time is reduced by 75%.

## **Unexpected out-of-hours customer demand**

Using the Out of Hours shift for reports, you establish that there is a demand for your services when you are closed.

Using Profile Reports identify the demand and the timing and consider opening at this time to handle the 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 to play an out of hours message apologizing for the fact you are closed, stating your opening times and if alternatives are available state what they are.

## **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 Group Traffic Reports to identify the guilty parties in terms of who transfers callers the most and then the Event Reports to find out the details. This may indicate training requirements to give the guilty members of staff the skills and knowledge to handle the 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. Ideas here 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.

## Creating Reports

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 [“To Filter Reports” on Page 16.](#)

### Create a Report Template



1. Click on the Reporter icon

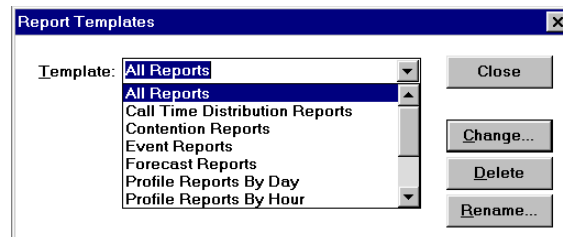


2. Click on the Report Template icon  
...or select Set-up, Report Templates.

3. Type a new template name over the existing name

From the Report Templates, you can create/edit templates:

- ✦ Add
- ✦ Change
- ✦ Delete
- ✦ Rename



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

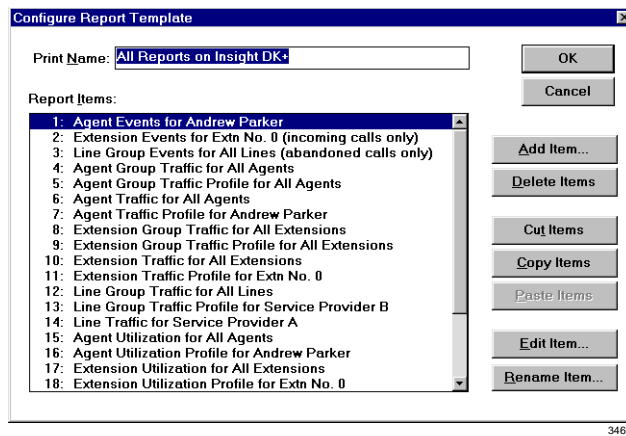
This is the template file name. The name that appears on the printed report is entered later, in Step 4.

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

...or click Delete, then select the name of a template to delete.

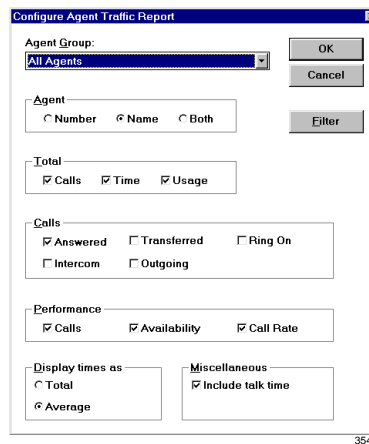
...or click Rename. From Rename Report Template, type in a New Template Name.

- Click OK.
- Click Close.



## Edit the Report Contents

- Select Reports, Report Templates.
- From Report Templates, click Change.
- Click Edit Item.
- 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, Ring  
On, Intercom,  
Outgoing
- ◆ Select  
Performance: Calls,  
Availability, Call  
Rate

You can set Call Rate (in the Performance section) to display twice: once for the Total Call Rate, once for the Average 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.

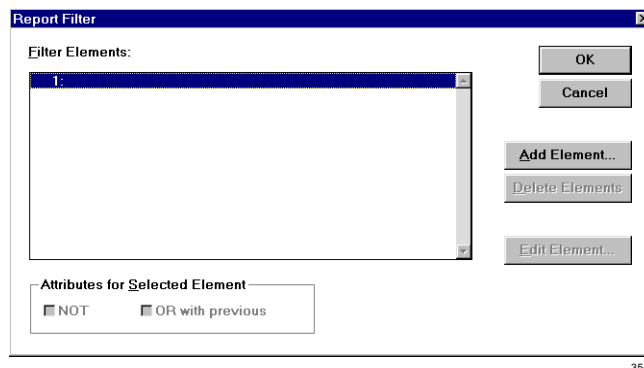
$$\text{Call Rate} = \frac{\text{Total Number of Calls}}{\text{Time Logged On}}$$

- ◆ Display Times
  - ◆ Miscellaneous
5. Click OK, then go to [Filter the Report Contents \(optional\)](#)  
...or click Filter (optional), and refer to [“Print the Report” on Page 34.](#)

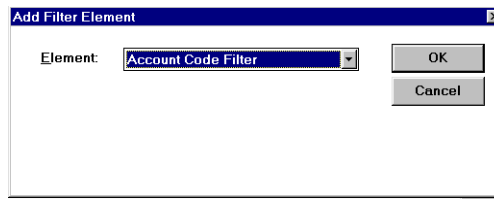
## Filter the Report Contents (optional)

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. If you clicked Filter; from the Report Filter box, click Add Element, Delete Element or Edit Element.  
...or, if you clicked OK in the previous window, proceed to the next step.



2. Click Add Element.
3. Select the type of filter(s) to be used.
4. Click OK three times, click Close.
5. Select File, Print, OK.



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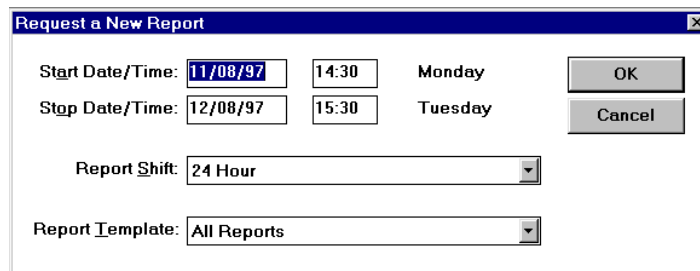
Hint: It is helpful to rename filtered files so that you can identify which filter has been applied to it.

## Print the Report

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



1. Click on the New icon  
...or select File, New.
- Select:
- ◆ The time period for the report to cover
  - ◆ Report Shift
  - ◆ A report template



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

2. Click OK.

The report should be compiled in a few minutes. A sample report is shown in [Figure 1](#).

24 Hour START: Monday 11/26/98 14:30 STOP: Friday 11/30/98 15:30	<b>Demonstration</b> All Reports on Insight DK+	Page 1 of 3 on 11/09/98
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Agent Traffic for All Agents											Part 1 of 2	
Agent	Total			Answered Calls				RNA		Outgoing		
	Calls	Ave. Time	% Use	Calls	Ave. Call	Ave. Talk	Ave. Wrap	Calls	Avg. Wait	Calls	Avg. Calls	Avg. Talk
Andrew Parker	1	01:26:25	1.2	0	00:00	00:00	00:00	0	00:00	1	01:26:25	01:26:25
Dave Stringer	95	14:57	19.7	84	16:80	13:49	02:29	0	00:00	11	04:38	04:38
Dale Whitaker	96	09:47	13.0	81	11:18	08:32	02:46	0	00:00	15	01:37	01:37
Beverly Cardner	101	12:12	17.1	98	12:24	09:36	02:48	1	06:57	2	04:55	04:55
Phil Otell	0	00:00	0.0	0	00:00	00:00	00:00	0	00:00	0	00:00	00:00
Jane Yeasky	79	16:49	18.5	70	16:45	14:31	02:14	0	00:00	9	17:20	17:20
Jenny Harrington	0	00:00	0.0	0	00:00	00:00	00:00	0	00:00	0	00:00	00:00
Alan Harrison	65	15:01	13.6	58	16:33	14:27	02:06	0	00:00	7	02:13	02:13
Gareth Wear	72	13:23	13.4	63	14:27	11:43	02:44	1	06:39	8	05:50	05:50
Tracy Oldman	67	18:02	6716.8	60	19:58	17:30	02:28	0	00:00	7	01:25	01:25
Alson Halton	76	16:28	17.4	51	16:24	14:08	02:16	0	00:00	25	16:35	16:35
<b>Total</b>	<b>652</b>	<b>14:25</b>	<b>11.9</b>	<b>565</b>	<b>15:11</b>	<b>12:40</b>	<b>02:31</b>	<b>2</b>	<b>06:48</b>	<b>85</b>	<b>09:35</b>	<b>09:35</b>

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**Figure 1 Sample Agent Traffic Report**

## Exporting Reports

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

**Note** The Insight DK Plus ODBC import/export capability works with a Microsoft ODBC 16-bit Driver.



1. Click on the Export icon  
...or click on File, Export.
2. In the Drives list box, select a drive to save the file in.
3. Select a Directory to save the file in
4. Enter a file name, click OK.

## Forecasting

The Forecasting feature is covered in this chapter, which includes the following topics:

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

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

Over a period the following parameters are calculated:

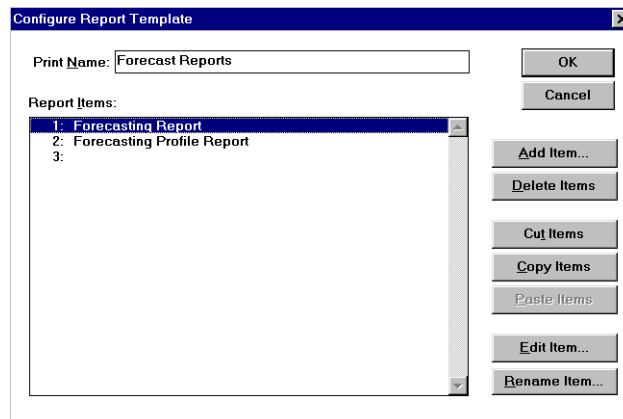
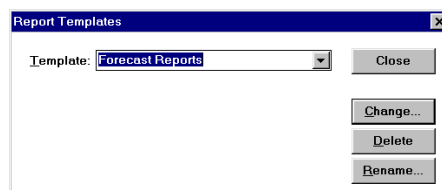
- ◆ The total number of incoming calls.
- ◆ The average incoming call time (including held time, but excluding wrapup time) on the line side of the call.
- ◆ The average waiting time of an incoming answered call on the line side.
- ◆ The number of available agents.
- ◆ The average wrapup time per incoming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

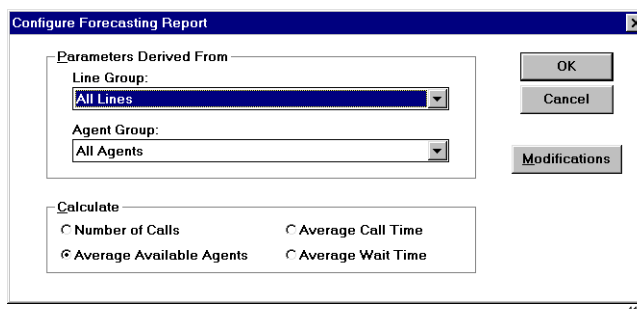
A forecasting report calculates the actual number of calls, average call time, average wait time and number of available agents over a specified time period using specified line and agent groups. It then provides an estimate of how one of these parameters would vary depending on specific modifications 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.

1. From the Reporter toolbar, select Report Templates.
2. From the Report Templates drop-down list, select Forecasting Report.

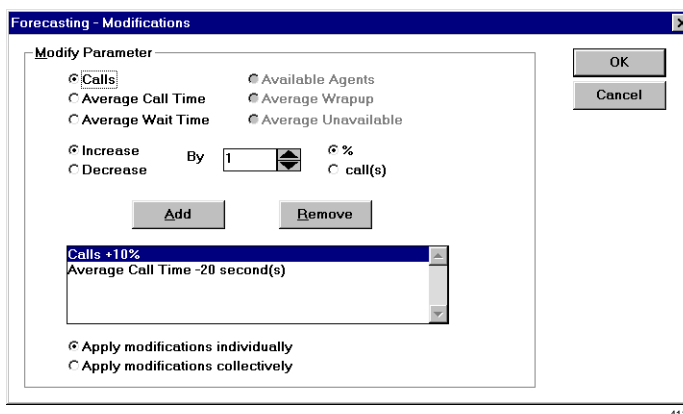


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- From the Configure Report Template dialog box, select the forecasting report to configure, then click Edit Item.



- From the Configure Forecasting Report box, select the line group you wish the number of calls, average call time and average wait time to be calculated from.
- Select the Agent Group you that wish the number of agents to be calculated from.
- Select the parameter you wish to calculate.
- Click Modifications.
- From the Forecasting Modifications dialog box, specify the modifications to be applied.



- Click OK.

The list box contains the modifications to be applied. Existing ones can be highlighted and removed or new ones added. These modification rules can be applied individually or collectively.

The Forecasting Report is generated (see [Figure 2](#)).

The report is presented in a modification per row format. Pagination occurs if there are too many modifications to fit in the height of a page.

24 Hour START: Monday 11/11/98 00:00 STOP: Friday 11/17/98 00:00	<b>Demonstration Forecast Reports</b>	Page 1 of 2 on 02/25/99
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Forecasting Report						Part 1 of 1
	Calls	Avg. Call Time (hh:)mm:ss	Avg. Wait Time (hh:)mm:ss	Available Agents	Avg. Wrapup (hh:)mm:ss	Avg. Unavail (hh:)mm:ss
As Originally Calculated	0	00:00	n/a	0.0	00:00	144:00:00
Call -14 call(s)	0	00:00	n/a	n/a	n/a	n/a
Calls +10%	0	00:00	n/a	n/a	n/a	n/a
Average Call Time -10 second(s)	0	00:00	n/a	n/a	n/a	n/a
Average Call Time +14%	0	00:00	n/a	n/a	n/a	n/a
Average Wait Time +5 second(s)	0	00:00	00:00	n/a	n/a	n/a
Average Wait Time -8%	0	00:00	00:00	n/a	n/a	n/a

**Using Parameters derived from:**  
Line Group {All Lines}, Agent Group {All Agents}

**Modifications applied individually:**  
Calls -14call(s), +10%  
Average Call Time -10 second(s), +14%  
Average Wait Time +5 second(s), -8%

**Calculating:**  
Available Agents

Note: if n/a appears in a field in the report above, that parameter could not be calculated.

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**Figure 2 Forecasting Report Example**

In Figure 2, “Modification applied individually” means, for example, if a modification of Calls +10% is applied to a set of calculated parameters, the result is what could have reasonably been expected, had the number of calls at that time been 10% higher than they actually were.

**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 1 minute up to 999 weeks.

The report is presented in a time band per column format. Pagination of the report will occur 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.

1. Select the forecasting profile report to configure and click the Edit Item button.

2. From the Configure Report Template dialog box, double click the forecasting profile report in the list box.
3. In the dialog box that appears do the following: Select the line group you wish the number of calls, average call time and average wait time to be calculated from.

**Configure Forecasting Profile Report**

Parameters Derived From

Line Group: All Lines

Agent Group: All Agents

Titles

Day  Month  Year

Date  Time

Profile Interval

Weeks  Days  Hours  Mins

1 Period

Maximum Intervals: 24

Calculate

Number of Calls  Average Call Time

Average Available Agents  Average Wait Time

OK  
Cancel  
Modifications

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4. Select the agent group you wish the number of agents to be calculated from.
5. Check the Day, Month, Year, Date and Time boxes in the Titles section according to what titles you want for each time band column within the report.
6. Choose the unit for specifying your time band interval (Mins, Hours, Days or Weeks), and then enter the number of minutes, hours, etc., you require.

7. In the Maximum Intervals text box enter an upper limit for the number of time bands that should be created when collating a report.
8. Select the parameter you that wish to calculate.
9. Click Modifications.
10. From the Forecasting - Modifications dialog box, specify the modifications to be applied.
11. Click OK.

If an overflow situation occurs during report collation, the time band that the data is collated into will wrap around the Maximum Intervals.

For example, if the report has a Maximum Intervals of 10 and it requires 23 time bands to cover the report period, then data for the first 10 time bands will go into time bands 1 to 10. Data for time bands 11 to 20 will go into time bands 1 to 10. Data for time bands 21 to 23 will go into time bands 1 to 3, etc.

The list box contains the modifications to be applied. Existing ones can be highlighted and removed or new ones added. These modification rules can be applied individually or collectively.

24 Hour START: Tuesday 11/11/98 00:00 STOP: Monday 11/17/98 00:00	<b>Demonstration Forecast Reports</b>	Page 1 of 2 on 02/25/99
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Forecasting Profile Report								Part 1 of 3
	Tuesday November 1998 11/11/98 00:00:00	Tuesday November 1998 11/11/98 00:05:00	Tuesday November 1998 11/11/98 00:10:00	Tuesday November 1998 11/11/98 00:15:00	Tuesday November 1998 11/11/98 00:20:00	Tuesday November 1998 11/11/98 00:25:00	Tuesday November 1998 11/11/98 00:30:00	Tuesday November 1998 11/11/98 00:35:00
As Originally Calculated	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Calls +16%	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
Average Wait Time -10%	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a

<p><b>Using Parameters derived from:</b>                  Line Group {All Lines}. Agent Group {All Agents}</p> <p><b>Modifications applied individually:</b>                  Calls +16%                  Average Wait Time -10%</p> <p><b>Calculating:</b>                  Available Agents</p> <p>Note: if n/a appears in a field in the report above, that parameter could not be calculated.</p>
---

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**Figure 3 Forecasting Profile Report Example**



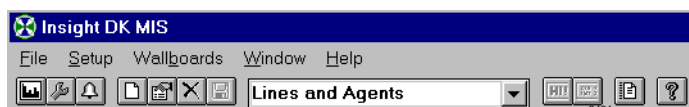
Wallboards can be configured with Insight DK and DK Plus to provide real time performance statistics and motivational text to call center groups.

Insight DK and DK Plus support up to six wallboards connected to each supervisor position. Insight DK provides a choice of 45 parameters to display; Insight DK Plus provides over 100 choices. A supervisor can send text messages as well. Audible alarms can also be added to alert staff to certain alarm states or messages.

Wallboards are units that contain lights that display messages to a large viewing area. The Insight DK 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 *inView User Guide* for more information.

## Configuring Wallboards

Each Insight DK MIS work station can drive up to six wallboards simultaneously via one serial port connection. The Wallboards menu (shown below) contains the configuration forms.



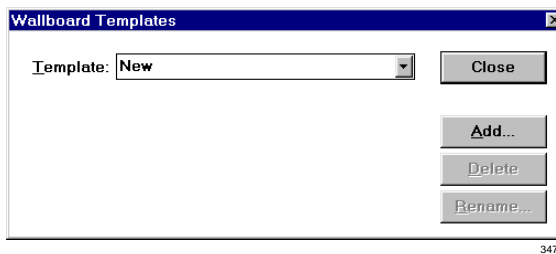
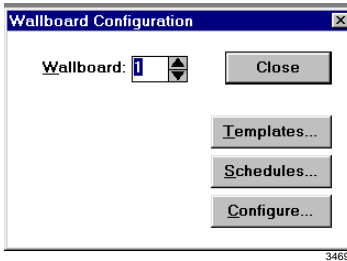
### Step 1: Select the Wallboard Serial Port

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

### Step 2: Create a 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.

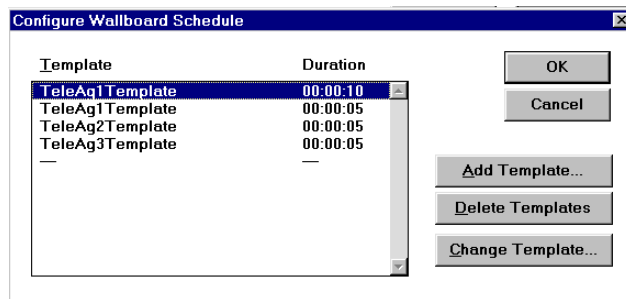
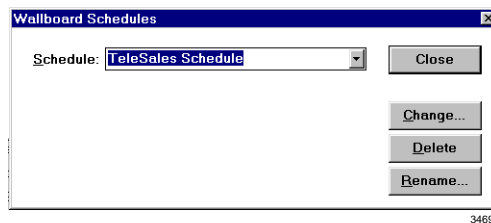
1. From the Main Menu, select Wallboard, Configure ...or click
2. Click Templates.
3. Type a new template name over the existing name.



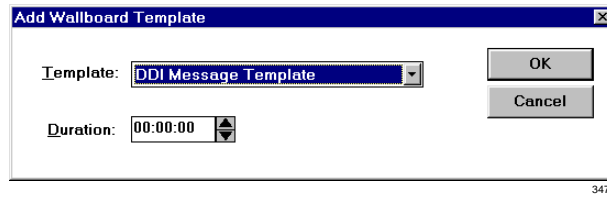
### Step 3: Create a Wallboard Schedule

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 Main Menu, select Wallboards, Configure, Schedules.
2. Type a new schedule name.
3. Click Add.
4. Click Add Template to view the templates, then select one.  
See below to Delete or Change Template(s).



5. Enter the wallboard template duration.



6. Repeat Substeps 3~5 to add or delete other templates for scheduling.

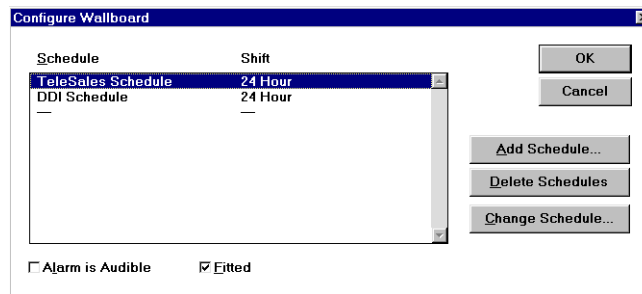
7. When scheduling is complete, click OK, then click Close.

8. From the Wallboard Configuration window, click Configure.

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

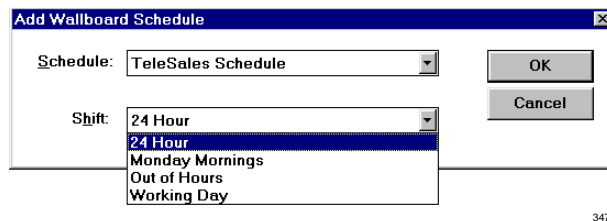
9. Delete any schedules that you do not need.

10. Make sure Fitted is checked.



11. Click Add Schedule to select the ones you want to add.

12. Select the shift during which you want the schedule to run and click OK.



13. (Optional) Select an alarm to sound when the alarm threshold is reached.

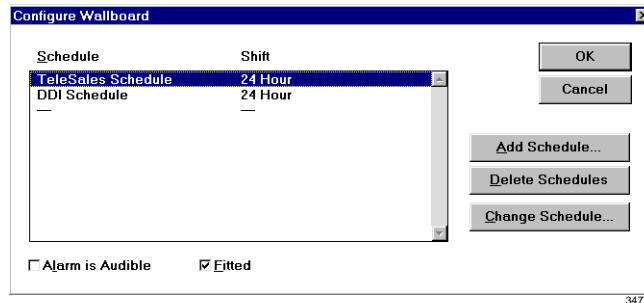
14. Press OK when done.

## Step 4: Configure the Wallboard Template

After you have created a schedule for displaying a sequence of wallboard template displays, you can configure the layout of the wallboards. This is where you determine which parameters will display and their placement on the board.

1. From the Wallboard Configuration window, click Configure.
2. Delete any schedules that you do not need.
3. Make sure Fitted is checked.

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



4. Click Add Schedule to select the ones you want to add.
5. Select the shift during which you want the schedule to run and click OK.
6. (Optional) Select an alarm to sound when the alarm threshold is reached.
7. Press OK when done.

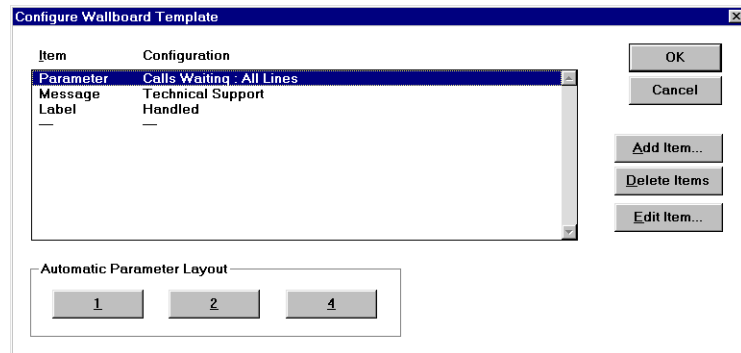
## Changing Fonts

There are two sizes of fonts for wallboards.

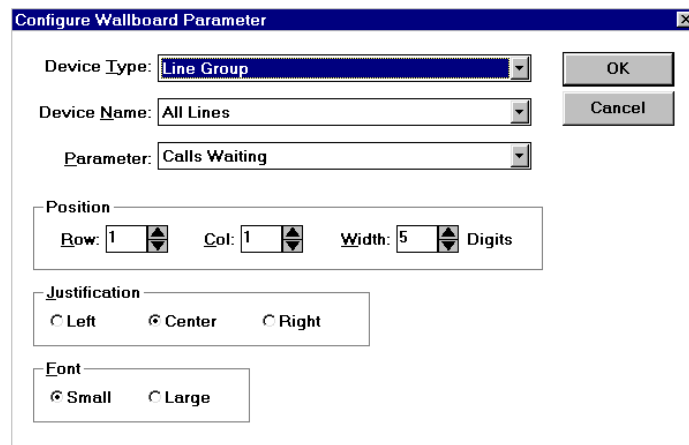
- ♦ **Small** – Depending on the wallboard, up to one or two rows of characters can be displayed. This size works well with real time performance information, since it allows up to six parameters to be shown.
- ♦ **Large** – One row of large text can be displayed. Large text is good for scrolling messages.

1. From the Main Menu, select Wallboard  
...or click the Wallboard icon

2. Click Configure.



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## Creating Temporary Wallboard Messages

Wallboard messages can be scheduled to appear for specific durations.



1. Select Wallboard, Messages  
...or select the Wallboard Messages icon.



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2. Type your message.
3. Enter the display time.
4. Select the wallboard to display the message, and whether you want the wallboard to 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.

## Queuing Messages

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

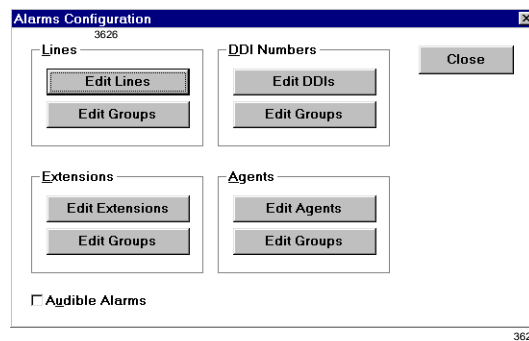
- Click Clear All Messages to remove all the messages queued up on the wallboards.

An on-screen alarm log is created to trace all the events causing an alarm. This log can be filtered for each individual or group to present only information needed by the user. The user's alarm window can be viewed in a monitor or browse mode. In the monitor mode, only current alarms are shown. In the Browse mode, past and current alarms can be viewed.

## Configure Alarms

You must first configure the alarms for each set of CO lines, DID lines and for any extensions or agents that you wish to set alarm thresholds for.

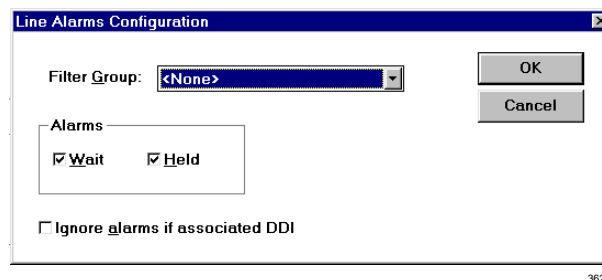
1. Click Setup, Alarms.
2. From Alarms Configuration, choose the appropriate button and check Audible Alarms if applicable.



3. Select or enter a Filter Group.
4. Refer to [Table](#) for alarm definitions.

**Note** "Held" alarms are not supported by the Strata DK.

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



5. Check any applicable alarms, click OK.
6. Close the Alarms Configuration window.



**Table 11 Alarm Thresholds**

Alarm	Available on	May Indicate
Wait Time – A call has been waiting too long to be answered.	<ul style="list-style-type: none"> <li>• Lines</li> <li>• Line Groups</li> <li>• DIDs</li> <li>• DID Groups</li> </ul>	An imbalance of lines to extensions/agents.
Held Time (not supported in Strata DK Insight) – A call which remains on hold for too long.	<ul style="list-style-type: none"> <li>• Lines</li> <li>• Line Groups</li> <li>• DIDs</li> <li>• DID Groups</li> </ul>	<p>A need for training.</p> <p>Need to allocate more agents or change the groups' answering priorities.</p>
Calls Waiting – The number of calls waiting to be answered.	<ul style="list-style-type: none"> <li>• Line Groups</li> <li>• DIDs</li> <li>• DID Groups</li> <li>• Ext. Groups</li> <li>• Agent Groups</li> </ul>	<p>An imbalance of lines to extensions/agents. May need to rearrange the groupings.</p> <p>A training issue. Use other stats to pinpoint need.</p>
Lines In Use – The number of lines used is near capacity.	<ul style="list-style-type: none"> <li>• Line Groups</li> <li>• DIDs</li> <li>• DID Groups</li> </ul>	<p>Need for more DIDs/lines.</p> <p>Need to rearrange the way the lines and DIDs are grouped.</p>
Extensions In Use – The number of extensions in a group is near capacity.	<ul style="list-style-type: none"> <li>• Ext. Groups</li> </ul>	Need for more extensions or to change the way they are grouped.
Agents in Use – The number of busy agents in any group is near the maximum.	<ul style="list-style-type: none"> <li>• Agent Groups</li> </ul>	<p>More agents needed.</p> <p>Need to change the way the agents are grouped.</p>
Free Time – An agent or extension has been free too long.	<ul style="list-style-type: none"> <li>• Extensions</li> <li>• Ext. Groups</li> <li>• Agents</li> <li>• Agent Groups</li> </ul>	<p>Possible over-staffing.</p> <p>May identify the resources that could be moved to a busier group without degrading the service provided by the group with free time.</p>



**Table 11 Alarm Thresholds** (continued)

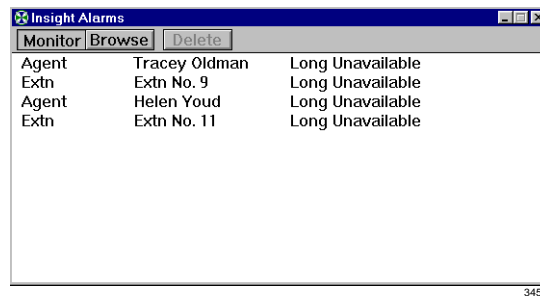
Alarm	Available on	May Indicate
Ring on Time – A call has been ringing an extension for too long.	<ul style="list-style-type: none"> <li>• Extensions</li> <li>• Ext. Groups</li> <li>• Agents</li> <li>• Agent Groups</li> </ul>	Possible under-staffing problem. Could move agents from a quieter group to 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.

## To View Alarms

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



➤ Click the Alarms icon.



From the Alarms window, you can:

- ◆ Click Browse and scroll to view any more alarms.
- ◆ From the Browse mode, you can select an alarm, then click Delete.

If more alarms have been triggered than will fit in the window, the most recent alarms appear in the window.

This is useful for agent message alarms, which are automatically deleted from the alarms list.

## Indication Colors

Insight DK 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. Busy state includes outgoing calls, incoming call, wrap up time, and unavailable
Green	Idle	Agent is idle. Line is free.
Grey	Device logged off	

Terms associated with alarms are explained in [Table 12](#).

**Table 12 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.)	<ul style="list-style-type: none"> <li>• Lines</li> <li>• Line groups</li> </ul>	May signify an imbalance of lines to extensions/agents.
Held Time (not supported by Strata DK)	A call which remains on hold for too long.	<ul style="list-style-type: none"> <li>• DIDs</li> <li>• DID groups</li> </ul>	<p>Could be a need for training.</p> <p>Could need to rearrange groupings of lines, DIDs and agents.</p> <p>More agents may be needed.</p>
Valid GOS	The level of service has dropped below the required standard (based on an algorithm made from a range of stats).	<ul style="list-style-type: none"> <li>• Lines</li> <li>• Line groups</li> <li>• DIDs</li> <li>• DID groups</li> <li>• Extensions</li> <li>• Extension groups</li> <li>• Agents</li> <li>• Agent groups</li> </ul>	<p>Summarizes the effect of a range of parameters. The algorithm uses many threshold values to provide a general picture of performance.</p> <p>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.)</p>
Ring On Time (Ring No Answer)	Shows when a call has been left ringing for longer than is acceptable.	<ul style="list-style-type: none"> <li>• Extensions</li> <li>• Extension groups</li> </ul>	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.	<ul style="list-style-type: none"> <li>• Agents</li> </ul>	Could be a training need.
Held on Time (not supported by Strata DK)	Calls were held at the extension too long before being transferred or retrieved.	<ul style="list-style-type: none"> <li>• Agent groups</li> </ul>	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.	<ul style="list-style-type: none"> <li>• Extensions</li> <li>• Extension groups</li> <li>• Agents</li> <li>• Agent groups</li> </ul>	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).	<ul style="list-style-type: none"> <li>• Extensions</li> <li>• Extension groups</li> <li>• Agents</li> </ul>	Identifies agents who take too long to get information required. Training may be needed.

# Glossary

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## General Terms

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

**Table 5**      **Glossary of Terms**

<b>Term</b>	<b>Definition</b>
<b>ACD</b>	Automatic Call Distribution.
<b>Account Code</b>	<p>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 9 digits can be entered per account code and 20 account codes can be entered per call.</p> <p>An analysis of account code usage is provided by the Insight Reporter.</p>
<b>Account Code Group</b>	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.)
<b>Account Code Super Group</b>	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.)
<b>Agent</b>	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.
<b>Agent Contention</b>	A situation where there are not enough agents available to take calls within the named agent group.
<b>Agent Group</b>	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.
<b>Agent Super Group</b>	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.

Table 5 Glossary of Terms (continued)

Term	Definition
<b>Alarms Window</b>	<p>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:</p> <ul style="list-style-type: none"> <li>• Type of device that is causing the alarm</li> <li>• Name of the device that is causing the alarm</li> <li>• Type of alarm.</li> </ul>
<b>Application Window</b>	<p>A window that contains a running application. Both Insight MIS and Insight Reporter have their own application window with menu, tool bar and workspace area for movable and sizable data windows used within the application. The application window shares its borders and title bar with display windows that are fully enlarged.</p>
<b>Call Line Identity (CLI)</b>	<p>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.</p>
<b>Contention Report</b>	<p>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.</p>
<b>Device</b>	<p>A line, DID number, extension or agent.</p>
<b>DID Group</b>	<p>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.</p>
<b>DID Numbers</b>	<p>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.</p>
<b>DID Super Group</b>	<p>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.</p>
<b>Dialog box</b>	<p>A box that displays command options and configuration parameters for you to review or change.</p>
<b>Drag</b>	<p>To hold down the left mouse button while moving the mouse.</p>
<b>Exporting data</b>	<p>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 ASCH format. This exported data file can be read into most commercial spreadsheet and database programs.</p>
<b>Extension</b>	<p>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.</p>
<b>Extension Contention</b>	<p>Not enough extensions are available to take calls within the named extension group.</p>

**Table 5** Glossary of Terms (continued)

Term	Definition
<b>Extension Group</b>	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.
<b>Extension Super Group</b>	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.
<b>GOS</b>	GOS - Grade of Service.
<b>GUI</b>	GUI - Insight uses the Windows™ Graphical User Interface (GUI), giving it a look and feel which is consistent with other Windows™ products.
<b>Line</b>	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.
<b>Line Contention</b>	Not enough lines are free for new calls. DIDs and DID groups. Applicable to line groups,
<b>Line Group</b>	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.
<b>Long Call</b>	Extension/Agent has been on a call for too long. Useful for monitoring performance and identifying training needs of agents.
<b>Long Free</b>	Extension/Agent has been free to take calls for too long.
<b>Long Queue</b>	Too many calls are waiting to be answered in the queue group. Applicable to line groups, DIDs, DID groups, extension groups and agent groups.
<b>Long Ring On</b>	Extension/Agent has been ringing for too long.
<b>Long Unavailable</b>	Extension/Agent has been unavailable to take calls for too long.
<b>Long Wait</b>	Call has been waiting to be answered for too long. Applicable to lines, line groups, DIDs, DID groups, extension groups and agent groups.
<b>Long Wrap</b>	Extension/Agent has been in wrap up for too long.
<b>Longest Wait</b>	Length of time the longest waiting call has been waiting for.
<b>Maximize button</b>	Applicable to windows that are not fully enlarged. When you the maximize button, the following occurs: <ul style="list-style-type: none"> <li>• The application window enlarges to fill the screen.</li> <li>• A data window enlarges to fill the workspace area of the Insight MIS application window.</li> </ul> <p><b>Note</b> Maximized windows have no borders.</p>
<b>Message</b>	Extension/Agent has sent a message to the supervisor. In this case the text associated with the message is displayed on the alarms window.

Table 5 Glossary of Terms (continued)

Term	Definition
<b>Minimize button</b>	Clicking the Minimize button is the same as choosing Minimize from a Control menu: The window shrinks to an icon.
<b>MIS</b>	Management Information System.
<b>ODBC</b>	<p>Open Database Connectivity (ODBC) is a standard application interface for accessing data in both relational and non-relational Database Management Systems (DBMS). By using the ODBC interface, applications can access and update a variety of databases / data sources using the same commands or language as if they were one, providing a relevant driver is available.</p> <p>By using ODBC a user is able to configure data sources to specific databases. This collection of data sources is then accessed using the same commands, hence shielding the complexity of individual databases.</p>
<b>PIN</b>	Personal Identification Number
<b>Real Time Display</b>	Once operational, Insight MIS can provide immediate visual feedback of the activity on your switch.
<b>Report Template</b>	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.
<b>Restore Button</b>	Clicking the Restore button is the same as choosing Restore from a Control menu: the window returns to its previous size.
<b>Unavailable</b>	<p>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.</p> <p>Insight MIS tracks the unavailable state in real time and also provides historical analysis of how long agents were unavailable and how often</p>
<b>Voice Mail</b>	Extensions which have been voice mail enabled are treated slightly differently by the Insight MIS. 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.
<b>Wallboards</b>	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
<b>Wrap Up</b>	<p>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.</p> <p>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.</p>

## Report Terminology

In addition to the glossary of terms, this section defines the terminology specific to the Reporter.

**Table 6 Report Terminology**

Term	Definition
<b>Account Codes</b>	Account codes entered during the call can be displayed on reports.
<b>Agent Logged in Time</b>	<p>The percentage time that an Agent has been logged in, divided by 100, times the report length period.</p> $\text{Time Logged on} = \frac{\% \text{ Logged on}}{100} \times \text{Report Length}$
<b>Average answered call time</b>	The average time taken during the call time.
<b>Average transfer count</b>	Of those calls that were transferred, the average number of times the calls were transferred.
<b>Call rate</b>	<p>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.</p> $\text{Call Rate} = \frac{\text{Total Calls}}{\text{Time Logged On}}$
<b>Calls inquired</b>	Number of inquiry calls (calls that have been held and retrieved by the same agent) made by all agents within the group.
<b>Call time (for agents)</b>	The time from the moment the call was answered until the call ended, including the wrap-up time.
<b>Call time (for lines)</b>	The time from the moment the call was answered until the line was freed.
<b>Connect device</b>	Displays the device to which the agent's extension is connected to complete the speech path. Can refer to the incoming DID number, if available (default), or to the line if preferred.
<b>Connect group</b>	Displays the name of the group assigned to the DID or line number to which the extension is connected during a call.
<b>Dialed digits</b>	Displays phone numbers of incoming and outgoing calls.
<b>Inquiry hold</b>	When an extension/agent places a call on hold and then reconnects to the call without transferring it.
<b>Erlang</b>	Number of inquiry calls (calls that have been held and retrieved by the same agent) made by all agents within the group.

**Table 6 Report Terminology** (continued)

Term	Definition
<b>GOS, Grade of Service (for Line Groups and DIDs)</b>	<p>Percentage of calls answered within the target answer time. This is related to the time set in the wait time alarm for that device. For example, if three minutes was set in the alarm, three minutes = the Target Answer Time. This is set using the Configurator. Options are available to include/exclude abandoned calls.</p> $\text{GOS} = \frac{\text{Total Calls} - (\text{Long Waits} + \text{Abandoned Calls})}{\text{Total Calls}} \times 100\%$
<b>Line or DDI Grade of Service excluding abandoned calls</b>	<p>The number of long waits is defined as the number of times the wait time threshold has been exceeded (set in the configurator). Where the threshold time has been disabled (by entering 0), the GOS will always be 100%. Both the long waits and number of calls must be in the same time frame, i.e., within the interval time or daily.</p> $\text{GOS} = \frac{\text{Total Calls} - \text{Long Waits}}{\text{Total Calls}} \times 100\%$
<b>GOS, Grade of Service (for Extensions and Agents)</b>	<p>Percentage of calls whose handling time was between a short call threshold and a long call threshold. The concept is also applicable to extension groups and agent groups..</p> $\text{GOS} = \frac{\text{Total Handled Calls} - (\text{Long Calls} + \text{Short Calls})}{\text{Total Handled Calls}} \times 100\%$
<b>Held time</b>	<p>The time for which a call was on hold.</p>
<b>Intercom call</b>	<p>A telephone call internal to the telephone system.</p>
<b>Long call</b>	<p>A long call is one that lasts for more time than the long call threshold.</p>
<b>Long waits</b>	<p>Number of calls whose waiting time exceeded the long wait analysis threshold. Options are available to include or exclude abandoned calls.</p>
<b>Maximum agents logged on</b>	<p>Maximum number of agents logged on during the profile period.</p>
<b>Maximum transfer count</b>	<p>Of those calls that were transferred, the maximum number of times the call was transferred.</p>
<b>Minimum agents logged on</b>	<p>Minimum number of agents logged on during the profile period.</p>
<b>No. logon</b>	<p>Number of times the agent logged on during the period.</p>
<b>No. unavailable</b>	<p>Number of times the device became unavailable during the period.</p>
<b>Ring on call</b>	<p>Ring on call is a call which rings on a device and then stops ringing before it is answered.</p>
<b>Short call</b>	<p>A short call is one that lasts for less time than the short call threshold.</p>
<b>Talk time</b>	<p>The time the agent was actually speaking to the caller.</p>
<b>Target answer time</b>	<p>A reminder of the answer time the agents are aiming to achieve.</p>



**Table 6** Report Terminology (continued)

Term	Definition
<b>Transfer from</b>	Displays the agents name and number (or extension, if preferred) from whom a call has been transferred.
<b>Transfer Pos</b>	Transfer position is the number of times a call has been transferred before it reached this agent.
<b>Transfer to</b>	Displays the agents name and number (or extension, if preferred) to whom a call has been transferred.
<b>Unavailable</b>	When 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 go available (in group) again.
<b>Wait time</b>	Shows the time a call was waiting to be answered.
<b>Wrap time</b>	The length of time the agent was in wrap-up.
<b>% logon</b>	Percentage of time for which the agent was logged on.
<b>% use (of activity)</b>	Percentage of time each device was allocated to a particular activity, such as answering incoming calls or making outgoing calls.
<b>% unavailable</b>	Percentage of time the device was unavailable.



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