

# TOSHIBA

## InView Quick Reference Guide



Effective Call Center Management

# STRATA

# CIX

## Introduction

This guide describes how to use the inView LAN application. Instructions for customizing the PC-wallboard displays and status displays are also covered. This guide is written assuming that you are familiar with operating a PC, mouse, and software.

**Note** Unless otherwise noted in this document, references to Insight apply to Insight CIX products. References to Strata refer to Strata CIX.

## Related Documents/Media

Refer to the following documents for more information:

- Strata CIX Call Center Solutions General Description
- Insight CIX Supervisor Guide
- Insight CIX Installation Manual
- Insight CIX Sample Report Guide
- Strata CIX Call Center Solutions CD-ROM

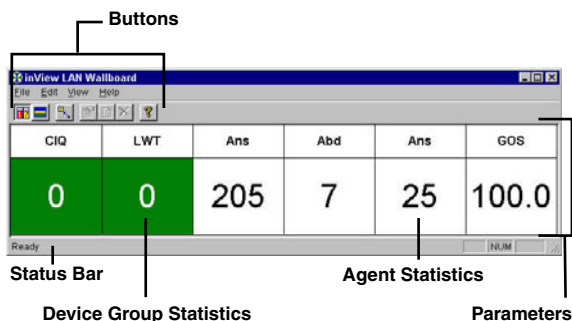
## Overview

The inView Local Area Network (LAN) application displays performance information and agent/extension status on your PC monitor. You can select the performance parameters and agent groups to monitor. You can also send text messages to any inView display or group of displays.

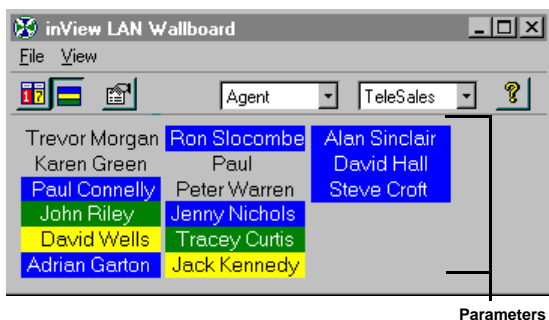
The inView application works in conjunction with the Insight and Insight Plus MIS application. inView product is a Microsoft® Windows®-based product that can show two different types of displays:

- LAN Wallboard view shows agent group statistics in large character format (see following figure). This Wallboard has four general call center parameters – Calls in Queue, Longest Wait Time, Number of Calls Answered and Abandoned. Two personal call center parameters – Call Answered and Grade of Service (GOS) – appear in the far right hand columns. Up to eight key parameters can be assigned to each wallboard. This allows agents to quickly see how their performances compare with that of the overall call center.

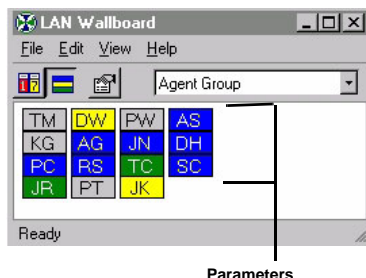
- Both the LAN Wallboard view and status displays can be



customized with window tools such as “click and drag,” toggle buttons and a toolbar. Each time a window opens, it defaults to the last saved display and configuration used by the login name. inView LAN displays can be shown as long names:



...or by short names:



The inView LAN display also includes an internal messaging system. This enables inView users to send messages to each other, either directly or via agent names.

## Log In/Display inView Wallboard

All users are required to log in to the system in order to ensure system security. The inView LAN Wallboard personalized client configurations can be saved for use by different users on the same PC. This means a user has the ability to log on at another user's PC and go automatically to a pre-set client configuration based on the user.

### ► To log in and display inView wallboard

1. From Windows, click Start > Programs > Insight for Toshiba CTX US > inView LAN Wallboard

...or locate and double-click the inView LAN Wallboard icon.

2. Enter your user name and the inView password (if required), click OK.

## Wallboard Parameters

### ► To add a wallboard parameter



1. Select Edit > Edit Mode  
...or click on the Toggle Edit Mode icon.



2. Select Edit > Add Parameter Window  
...or click on the Add Parameter Window icon  
...or right-click on the displayed Parameter Window to edit.
3. From the Properties for the Parameter Window screen, you can:
  - Select the Device Type from the drop-down list, such as Line, Extension, or DID group.
  - Select the Device Name from the drop-down list. The names are defined by the System Administrator.
  - Select the Parameter to display from the drop-down list.

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

- Click on Parameter Font to change the font, style and/or size of the parameter font.
  - Click on Label Font to change the font, style and/or size of the label font.
4. Click OK

### ► To change a wallboard parameter



1. Select Edit > Edit Mode  
...or click on the Toggle Edit Mode icon.



2. Select Edit > Properties  
...or click on the Edit Properties icon.
3. Make any changes on the Properties for the Parameter Window screen and click OK.

### ► To move a wallboard parameter in the display



1. Select Edit > Edit Mode  
...or click on the Toggle Edit Mode icon.
2. Select Edit > Grid Settings.
3. From the Grid Settings screen, check Show Grid and Snap to Grid. Click OK.
4. Click on a parameter box and drag the box to the new location on the display.

### ► To remove a wallboard parameter



1. Select Edit Menu > Edit Mode  
...or click on the Toggle Edit Mode icon.
2. Click on the parameter to be removed.
3. Select Edit > Delete Parameter  
...or click Delete Parameter Window icon.



## Messages

You can send a message of up to 256 characters to any other inView User, Agent, or Agent Group, depending on the Message Access Level.

You can store up to ten frequently used messages in a message library. Messages are added and removed using the Add and Delete Message Library buttons, and are recalled by selecting them from the Message list.

Messages can be displayed as normal or high priority messages.

### ► To send a message

1. Select Edit > Messaging.
2. Select a message from the drop-down list  
...or type a new one into the Message box.
3. (optional) Click Add to add this message to the library.  
You can also Delete messages from the library within this box.
4. Select a priority for the message, either Normal or High.
5. Select one or more message recipient(s) from the list boxes:  
Agent or Security Group.
6. Click Send.

## Pop-up on Message

The inView LAN Wallboard is brought to the foreground if:

- Pop-up on Message is On.
- inView client application is in the Wallboard View.
- Application has been minimized or put to the background.
- Alarm threshold has been exceeded.

Any work in progress in another application, e.g., word processing is not interrupted.

Note Alarms are set by the MIS Administrator.

- From the View menu, select Popup Alarm.

## Always-on-top Option

You can specify that the inView LAN client application always remains on top of all other application windows, even when other applications are being used. A check indicates this feature is On.

- From the View menu, select Always on Top.

## Status Bar

The status bar provides descriptions of some icons or shows current state of the applications.

- From the View menu, select Status Bar.

## Toolbar

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

- From the View menu, select Toolbar.

## Parameters Only View

You can display just the parameters.

- Double-click in the parameter section of the screen (see illustrations in Overview section).

## Agent/Extension Status Display

- **To view Agent Status Display**



- From the menu, select View > Agent/ Extension Status  
...or click on the Agent/Extension Status View icon.
- From the Status Display, you can select from the drop-down lists:
  - group type (Agent or Extension)
  - group



# TOSHIBA

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