



CCM 4.0

Wallboard Manager

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Introduction

General

Contact Center Modules (CCM) provides the user with the necessary tools to facilitate the management of call traffic. They are designed to provide a tightly integrated real time and historic reporting package and wallboard support for the eBusiness digital communications platform. The product consists of a set of fully integrated modules sharing a common database utilizing Interactive Directory and Database (IDD) technology.

The suite of modules consists of the following applications:

Call Center View (CCV):

Provides a management package for telephone based staff and supports any size Customer Facing Department (CFD) or contact center. To effectively control customer service levels, real time human resource management is essential and the Call Center View has been specially designed to manage the CFD's or contact center's most valuable and expensive asset – it's people.

Call Center View Alarm Reporter:

Provides information (for each Call Center Profile) about alarms that have occurred within the contact center. The detailed alarm information for each directory number is presented in report format, which can then be printed.

Wallboard Manager:

Real time information from the contact centre is essential to react to constantly changing telephone traffic levels and provide excellent customer service. Wallboards allow managers and staff to monitor the service being provided and respond immediately. Wallboards provide current information on the number of calls waiting, response times and service levels. Wallboard Manager provides the ability to drive Ferrograph physical wallboards and PC wallboards.

PC Wallboard:

The PC Wallboard delivers traditional wall mounted wallboard functionality to the desktop but with the additional benefit of each PC Wallboard agent being able to configure and monitor a personalized view of the contact center. The PC Wallboard also enables agents to increase their productivity and maintain revenue levels with the added benefit of managing customer callback requests.

Report Manager:

Provides in depth historical reporting on CFD or contact center activity. In addition to call information, the Report Manager also reports agent activity. This powerful package allows individual call records to be stored and reported upon months later.

Workforce Management – Blue Pumpkin:

Workforce Management Interface allows integrated rostering, forecasting and scheduling systems to connect across the LAN to a comma separated variable (CSV) file containing a list of contact center related metrics.

Multimedia Module:

MultiMedia Module (MMM), is a customer contact software solutions that enables companies and departments to manage multimedia contacts into and out of the organization. MMM provides applications that manage Web Chat, E-mail and Web Call Back communications. For installation of MultiMedia Module, refer to the separate Installation Manual.

Report Designer:

The Report Designer is a separate product that can be used in conjunction with Report Manager and is a software tool used for querying and reporting. It enables the user to create reports that contain data from their contact center database and schedule reports to be updated and printed. It is installed when Report Client is installed but requires a licence to operate.

INDeX Taskbar:

Enforces the user rights and password protection as well as providing a single point of access to the Contact Center Modules.

INDeX Wallboard Manager

Wallboard Manager provides the user with the ability to monitor, in real time, the service being provided to customers and display information on customer service metrics such as number of calls waiting, waiting call queue length and Service levels.

The Wallboard Manager application comprises of the following elements:

- Wallboard Server
- Wallboard Client (Maximum 19)
- PC Wallboard (Maximum 250 – dependent upon the number of purchased licenses)
- Physical Wallboards (Maximum 30) in total.

The Wallboard Server & Client applications use a wizard. A wizard is a series of presentations, displayed in a secondary window, which guides you through the application. Simply follow the instructions on each screen, selecting your required options.

INDeX Wallboard Server

This enables a maximum of 20 users to add, edit and delete Wallboard messages from Wallboard message library. It also provides a sophisticated scheduling wizard to display Wallboard messages.

The Wallboard Server enables you to display messages on to a Wallboard device which could be a wall mounted Wallboard or the PC Wallboard.

A message can be created in two formats:

- text only message.

or

- text incorporating Variable Data.

Variable Data is information received from the telephone system (e.g. Number of Calls Waiting).

Each message has to be scheduled accordingly, to be displayed on to a Wallboard device. A message can be scheduled to be sent immediately or at a predefined time or date. Supervisors may select a message and send it to a single, several or all Wallboard devices.

The Wallboard Server application also enables you to compile alarm messages, which can be accessible from other applications, e.g. Call Center View.

Up to 30 different Wallboards or 250 PC Wallboards can be connected to the PC hosting the Wallboard Server application. These devices are installed and configured individually.

INDeX Wallboard Client

Using the Wallboard Client you have full access to the message database as well as the ability to schedule your required message to the Wallboard media of your choice (ie. Wallboard or the PC Wallboard).

Wallboard Client does not support the following features:

- Add, Edit and Delete Alarm Messages
- Format Alarm Messages
- Add and configure Wallboard Devices

INDeX PC Wallboard

The PC Wallboard allows full Wallboard functionality to be displayed on a Windows PC. A maximum of 250 PC Wallboards can concurrently be connected to a single Wallboard Server.

The PC Wallboard operates in two modes:

- **Enhanced (Agent mode).** The agent must be logged on to the Telephone system prior to invoking the PC Wallboard. The agents log on to the PC Wallboard using their individual agent logon ID and the computer name of where the Wallboard server is running. The currently logged on agent has the ability to view their own personalized configuration of the contact center, consisting of up to 20 contact center variables as well as their assigned scheduled messages.
- **Standard User mode.** Displaying only the scheduled messages received from the Wallboard Server/Client applications. In this mode you logon to the PC Wallboard using only alphanumeric text and the name of the server where the Wallboard is running.

INDeX Taskbar

INDeX Taskbar provides the ability to launch the INDeX CCM applications. It also provides built in security through a logon procedure; i.e. you must log on to the INDeX Taskbar before launching the INDeX CCM. Further details on the INDeX Taskbar are available from the INDeX Taskbar User Manual.

Wallboard Server

Starting the Wallboard Server

Before starting the INDeX Wallboard Server, you must ensure that the Delta Server is running and that you have logged on to the INDeX Taskbar.

The Wallboard Server can be launched by clicking the Wallboard Server icon in the INDeX Taskbar. You can also start the Wallboard Server by following the procedure below.

1. Click the **Start** button on the Windows taskbar.
2. Point to **Programs** and then **INDeX CCM**.
3. Select **Wallboard Server** from the sub-menu.

The Wallboard Server will automatically connect to the last known Delta Server if you are not using the Wallboard Server for the first time, and in the splash screen, the *Reconnect to last known Delta Server* option is selected. If you are using the Wallboard Server for the first time, or if in the splash screen, the *Reconnect to last known Delta Server* option is not selected, then the Search screen appears indicating the Wallboard Server is searching for the Delta Server(s). Once the Delta Server(s) have been located the Find Server screen appears.

1. Select the required Delta Server, then click the **Connect** button.
2. If your required Delta Server is not listed, click the **Advanced** button then:
3. Select one of the options of where to search for the server.
4. Click the **Search** button.
5. From the listed Delta Server(s), select the required server.
6. Click the **Connect** button.

Note: Every time you start and/or exit the Wallboard Server, the internal buzzer within the Wallboard is triggered whilst resetting the Wallboard device(s).

Check Wallboard Operation

Once you have started the Wallboard server, you can check the Wallboards that you are connected to.

1. From the **Devices** menu select **Wallboard Properties**.
2. The list of available Wallboards is shown. If no Wallboards show, you will need to install a Wallboard.

To check a Wallboard:

1. Select the Wallboard to check from the listing.
2. Click on the **Properties** button.
3. Click on the **Hardware** tab.
4. Click the **Self Test OFF** button to start the self-test. A message will show asking '*The self test will clear any messages on the selected wallboard. Do you wish to continue?*' Click on the **Yes** button if there are no messages running.
5. If information appears on the selected Wallboard, click on the **Self test ON** button to turn the test off.
6. Click the **Cancel** button.
7. Click the **Close** button.

View Active PC Wallboard

When this option is selected, you will see a list of PC Wallboard(s) currently connected to the Wallboard Server. To update the list, click **Refresh**.

Schedule List

Once scheduled, messages appear on the message schedule list. This allows the supervisors to quickly view, which messages are currently, being sent and which are scheduled to be sent to the Wallboard devices. A total number of 100 messages can be scheduled. The Schedule List displays the following criteria:

Status: Shows if message is active or inactive.

Active indicates the Scheduled Message is being displayed on the Wallboard device, however this depends upon the priority level of the message.

Inactive indicates the Scheduled Message is not currently displayed on the Wallboard device.

Message: The text of the message to be sent including variables.

Client: The name of the machine which has scheduled the message.

User: The name of the user who has scheduled the message.

Priority: Shows the priority of the message (1-9).

Start Date: The date at which the message will be sent to the Wallboard.

Start Time: The time at which the message will be sent to the Wallboard.

Duration: The duration for which the message will appear on the Wallboard.

Delay: The delay between the message being removed and redisplayed.

Repeat: The number of times the message is to be repeated.

Device: The Wallboard device type to which the message is to be sent.

Unit: The address of the Wallboard to which the message is to be sent.

Port: The Comms port to which the Wallboard is attached.

Variable 1; Variable 2; Variable 3; Variable 4; Variable 5; Variable 6: The variable type assigned within a message (e.g. calls waiting).

DN:1; DN:2; DN:3: The directory number(s) on which the variable will report (e.g. Agent 4444).

Alpha Tag: The name of the Wallboard device.

Display Zero Values: Shows zero values for any selected variable.

Administering Messages

Overview of Administering Messages

This section details the procedures required to add, edit and delete messages; create, edit and delete a customized variables, and schedule messages.


Wizards are used to help you set your options. To use a Wizard just follow the instructions on the screen, selecting your required options. Command buttons on each wizard screen are:

- Back** To redefine any of your setup options.
- Next** To proceed to the next step.
- Cancel** To close the screen without making any changes.
- Update** To complete and save your message.
- Finish** To end the wizard.

Wizard screen toolbar buttons are provided with ToolTips. To review the function of a toolbar button, move the cursor over it. A message appears describing the button's function.

Create a Message

This section details the procedure to create a message, include it in the Message Library and show it on the Wallboard. To create a new message:

1. Click  from the Wallboard Server main screen.
2. Select **Add Message**.
3. Click the **Next** button to proceed.
4. Select the format of the characters and the color of the message. See page 9 for more information on formatting messages.
5. Type in your message and select any variable data. If the message showing in the Message preview area is correct, click on the Update button. See page 11 for more information on variable data.
6. Select **Schedule Message**.
7. Click the **Next** button to proceed.
8. Select the message you have just created and then click on the Next button.
9. Specify the starting date and time. For more information, refer to page 15.
10. Click the **Next** button to proceed.
11. Select the Priority level. Refer to page 16 for more information.
12. Click the **Next** button to proceed.
13. If your message contains variable data, you will have to opportunity to select the directory numbers. Detailed information about this option is given on page 17.
14. Click the **Next** button to proceed.
15. Select the target Wallboard. Page 17 contains details on selecting different Wallboards and PC Wallboards.
16. Click the **Finish** button.

Format Messages

Formatting must be selected **BEFORE** typing a message.

When writing a message (Max 100 characters), you can apply character formats to the text (e.g. bold or top line, etc.) by using the buttons.

You can specify whether to display text on the top line or bottom line (single height), or double height of a Wallboard device. It is possible to display two (single height) messages at once.

Format Characters (10/22 Wallboards)

To format the characters, click the option(s) as required i.e.:

 - Bold,  - Flashing,  - Inverse

Note: It is not possible to format a single word as these features affect the whole message
The following table details the number of characters that it is possible to display on Wallboard devices when using certain formats.

Line	Bold	Inverse	Flashing	Characters
Top	Off	Off	Off	22 Characters
	On	Off	Off	11 Characters
	On	On	On	11 Characters
	On	On	Off	11 Characters
	Off	Off	On	22 Characters
	Off	Off	On	22 Characters
	Off	On	Off	22 Characters
Bottom	Off	Off	Off	22 Characters
	On	Off	Off	11 Characters
	On	On	Off	11 Characters
	On	On	On	11 Characters
	Off	On	Off	22 Characters
	Off	On	On	22 Characters
	Off	On	On	22 Characters
Top & Bottom	Off	Off	Off	22 Characters
	On	Off	Off	11 Characters
	On	Off	Off	11 Characters
	On	On	Off	11 Characters
	On	On	On	11 Characters
	Off	On	Off	22 Characters
	Off	On	On	22 Characters
Double	Off	Off	Off	11 Characters
	On	Off	Off	5 Characters
	On	Off	On	5 Characters
	On	On	On	5 Characters
	Off	On	Off	11 Characters
	Off	On	On	11 Characters
	Off	Off	On	11 Characters

Control the Display Line

To alter the display line of text, click:



Top line - By default this option is selected

or



Bottom Line


or



Double Height

Message Display Setup

You can also specify the color as well as the display features (i.e. how the message appears and disappears from the Wallboard device) of the characters on the Wallboard device. These features must be selected prior to typing the text.

- Click  to change the color as well as the display features of the characters on the Wallboard device.
 - To change the color, click any of the color options.
- To change the visual effect of the characters (i.e. **Display Features**) as they **Appear** on the Wallboard device, click the pull down arrow for the available options. Select the required feature.
- To change the visual effect of the characters on a 10/22 Wallboard (i.e. **Display Features**) as they **Disappear**, click the pull down arrow for the available options. Select the required feature.
- When finished, click **OK**.
- To close the screen without making any changes click **Cancel**.

Note: Some of the Appear Features will not be displayed on the Wallboard devices correctly due to text formatting, e.g. Uppercase letters, Bold, Double Height, etc.



Buzzer - This will trigger the internal buzzer whilst the message is being displayed on Wallboard device(s).



Relay - This will trigger the external device(s) (e.g. light) whilst the message is being displayed on the Wallboard device(s).

Pause Message (10/22 Wallboards only)

This option creates a delay of 2 seconds between **scrolling** messages. This feature is only valid for messages whose Appear/Disappear features are set to scrolling. If you wish for a delay between scrolling messages, then click associated with Pause.



- Pause – indicates 2 seconds delay between scrolling messages
- Pause – indicates no delay between scrolling messages. (Default setting)

Apply Variable Data

Each message can contain text incorporating Variable Data. Variable Data is directory number information received from the telephone system as well as any customized variable that has been created in Summary Variables. Refer to page 12 for more information on summary variables.


Up to 6 different types of Variable Data can be associated with a single message. In the Message text box and Message Preview the text between { } indicates you have selected Variable Data.

To include Variable Data:

1. Click the  associated with Variable Data 1.
2. Select the required option from the list.
3. Click  to incorporate the variable within the text.
4. Repeat the procedure for Variable Data 2 and 3 if additional variables are required.

Time and Date

Time, Date as well as Time and Date can be selected as variable data to be displayed on the Wallboard. When you select any of these variables, the Clock icon becomes active.

If you want to compensate for a different time zone, click the Clock icon . The Time Offset screen appears. Select an offset in hours (-12 to 12).

Display Zero Values

If you do not wish to display Variable Data when the value is zero, then make sure that there is not a tick in the box to the left of Display Zero Values in the Wallboard wizard screen. This option has no effect on a Scheduled Message with Priority Level 10, as the zero value will always be displayed on the Wallboard device(s).

- Display Zero Values – indicates zero values will be displayed on the Wallboard device;
- Display Zero Values – indicates zero values will not be displayed on the Wallboard device.

Available Variable Data

The available **Variable Data** are:

Agents Active on Calls: The total number of agents participating on calls.

Answered All: The total number of all calls (internal and external) answered.

Answered External: The total number of external calls answered.

Answered Excluding Transfers - All: The total number of internal and external answered calls, excluding transfers.

Answered Excluding Transfers - External: The total number of external answered calls, excluding transfers.

Average Answer Time All: The average answer time taken to answer all calls today/this shift.

Average Answer Time External: The average answer time taken to answer external calls today/this shift.

Calls Waiting: The number of calls currently being offered to the group.

GOS (Grade of Service): The number of calls answered within the target answer time expressed as percentage of calls presented.

Group Activity Status: The current activity of the displayed group.

Group Calls Answered All: The total number of all internal and external incoming answered calls, answered by agents for this group.

Group Calls Answered External: The total number of external incoming answered calls, answered by agents for this group.

Group Calls Average Duration All: The average duration of all calls answered for a particular agent group.

Longest Waiting Call: The length of the current longest call (5 second update).

Lost All: The total number of all calls (internal and external) that were lost.

Lost External: The total number of external calls that were lost.

Name: The name associated with the directory number as defined by the programming.

Outgoing All: The total number of calls (internal and external) made today/this shift.

Outgoing External: The total number of external calls made today/this shift.

PCA (Percentage Calls Answered): The number of calls answered within the target answer time expressed as a percentage of calls (PCA).

New I/C Presented: The total number of new incoming calls presented today/this shift.

State: Displays eleven different states: busy, busy not available, busy wrap up, holding, incoming logged off, outgoing, ready, ringing, internal made and internal received. These can be applied to any applicable device .

Time: The current time.

Date: Today's date.

Time and Date: The current time and today's date.

Number in State - Incoming: The number of agents or trunks currently engaged on incoming calls.

Number in State - Outgoing: The number of agents or trunks currently engaged on outgoing calls .

Number in State - Ready: The number of Agents or Trunks currently available to take calls.

Number in State - Holding: The number of agents currently holding calls .

Number in State - Busy-WrapUp: The number of agents currently in Busy Wrap Up.

Number in State - Busy Not Available: The number of agents currently in Busy Not Available.

Number in State - Busy: The number of agents or trunks currently busy .

Number in State - Logged Off: The number of agents currently logged off.

Number in State - Ringing: The number of agents whose turret is currently ringing.

Number in State - Internal Made: The number of agents currently on internal made calls .

Number in State - Internal Received: The number of agents currently on internal received calls.

If you have created your own variables, they will also be displayed in the list of available Variable Data. See page 13 for how to create variable data.

Summary Variable

The Summary Variable option enables you to create a customized variable. This involves assigning any of the Variable Data choices to a multiple number of directory numbers. When you create a message the customized variables will show within the variable data list.

Create

To create a variable:

1. From **Edit** menu, select **Summary Variable** then **Create Variable**. The Create Variable screen appears.
 2. In the **Variable Name** text box, type a name for the variable.
 3. Select the **Variable Data** required using the pull down arrow.
 4. Click the **Search DN** button to view the Dn Search screen. The **Available Dns** list box contains all the directory numbers within the Telephone system associated with the selected **Dn Selection** categories.
 5. To deselect any of the categories, click a associated with that category.
 6. To select any of the categories, click a associated with that category.
 7. Select the required directory number(s) and then click **OK**.
 8. Click the **Save** button once you have created the variable
 9. Click the **Close** button when you have finished creating the required variable(s).
-

Edit/Delete Variable

To edit a variable:

1. From Edit menu, select Summary Variable.
2. Select Edit/Delete Variable. The Edit/Delete Variable screen appears. The Variable Name section displays the created variable(s). When you click a variable, the assigned directory numbers will be displayed within the Selected Dns pane.

To change the name of a variable:

1. Select the required variable.
2. Click the **Rename** button.
3. Enter the required name.
4. Click on the **Ok** button when finished.

To remove a variable:

1. Select the required variable.
2. Click the **Delete** button.

To edit a directory number:

1. Click the directory number to remove.
2. Click the **Remove** button.

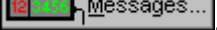
To add a directory number:

1. Click the **Add** button.
2. Select the directory number required from the DN Search screen.
3. Click on the **Ok** button when finished.

Edit Message

Once a message is stored in the library, it can be modified.


To edit a message:

1. From the Wallboard Server main screen, click  Messages...
2. Select **Edit Message**.
3. Click the **Next** button to proceed.
4. Select the required message and then click the **Next** button to proceed.
5. Change the formatting if required. (See page 9 for further information).
6. Change the variable data if required (See page 11 for further information).

Delete Message

Once a message is stored in the library, it can be deleted if no longer required.

To delete a message:

1. From the Wallboard Server main screen, click  Messages...
2. Select **Delete Message**.
3. Click the **Next** button to proceed.
4. Select the required message.
5. Click the **Delete** button.
6. Once you have completed deleting the required messages, click the **Finish** button.

Scheduling Messages


General

When you are scheduling a message you need to consider the following criteria:

1. When to display the message (immediately or preset date and time);
2. The duration of the message to be displayed;
3. How important the message is (i.e. its priority level);
4. How often to display the message (i.e. only once or repeatedly);
5. The directory number, if the message incorporates variable data;
6. Which Wallboard device(s), i.e. Wallboard or the PC Wallboard.

Schedule a Message

Messages can be scheduled when they are created or later. If you have already created a message, you can schedule it by:

1. Click  from the Wallboard Server main screen.
2. Select **Schedule Message**.
3. Click the **Next** button.
4. Select the required message by clicking on it.
5. Click the **Next** Button.

Starting Date and Time of Message

If you want to display the message immediately to a Wallboard device:

1. Ensure there is a tick next to the option *Send the message immediately*.
2. Click the **Next** button to continue.

To set the date and time for the message to appear on the Wallboard device:

1. Remove the tick from the option *Send the message immediately*
2. Enter the required start Date and Time for the message to be displayed **Duration** enables you to set the length of time that the message will be displayed on a Wallboard device. By default, the Duration is set to 10 seconds.
3. Click the **Next** button to continue.

Priority Level/Repeat Message

This option enables you to prioritize your message.

To change the Priority Level:

1. Click spin button to obtain the required priority number. The priority levels available are between 5 and 10. Priority Levels 1–4 are designated for messages received from the Call Center View application, see the table shown below. Priority Level 5 can also be utilized to schedule a message from the Library Message Database.

Priority Level	Message received from Call Center View
1	Supervisor Send Message to active PC Wallboard(s)
2	Critical Alarm threshold
3	Caution Alarm threshold
4	Normal Alarm threshold
5	Standard Send Message to default Wallboard as well as all active PC Wallboards

2. Scheduled Messages with priority level 10 will be chained. Chaining allows you to display messages on a Wallboard device in sequence. This means that a series of messages can be displayed one after the other. When a message is chained, the Start Date, Start Time and Delay are adjusted automatically to ensure that the messages are displayed in the correct sequence.

Note: The Schedule List displays the order of when a message was scheduled, so chained messages may not be displayed on the Scheduled List in the correct order. The 0 (zero) value will always be displayed on the Wallboard device(s) for a Scheduled Message with Priority Level 10 (i.e. Chained Message).

To prevent messages repeating:

1. Select the **No** option underneath the question *Do you want to repeat the scheduled message?*
2. Click the **Next** button to continue.

To repeat messages:

1. Select the **Yes** option underneath the question *Do you want to repeat the scheduled message?*
2. To display the message repeatedly on the Wallboard device, make sure that there is a tick in the box next to the question *Repeat the message Forever.*

Or

- To display the message on the Wallboard device only a few times, make sure that there is no tick in the box next to the question *Repeat the message Forever.*
3. Select the number of times to repeat the message. The maximum number of repeats is 999.
 4. Amend the delay before the message is repeated. By clicking in the section containing either the hour, minutes or seconds you can change the value using the spin buttons.
 5. Click the **Next** button to continue.
 6. Click the **Next** button to continue.

Select Directory Numbers

This screen appears only if you have selected a message that contains Variable Data using directory numbers. If you have not, you will view the Select Wallboard Devices screen as detailed on page 17.


The number of entry boxes depends upon the number of Variable Data (1 - 6) incorporated in the message. (i.e. if a message contains only one Variable Data, then one entry box will appear in this screen).

Directory Number for All Variables

To monitor the call status of only one directory number for the selected message, then enter the required directory number in this text box. The same number is entered automatically in the selected variable(s).

Directory number for Individual Variable

To monitor different directory numbers for the selected message, then enter the required directory number in each Variable Data entry box.

1. Click  or double click a Variable Data box, the DN Search screen appears.
2. Click the required Directory Number, then click the **OK** button or double click the required directory number.
3. Click the **Next** button to continue.

Select Wallboard Devices

Wallboard.

To display messages on a Wallboard:

1. Make sure that Wallboard is selected
2. Check that the target is correct. To display the scheduled message on a different Wallboard device, click on the **Change** button to view the Wallboard Server Browser screen.
3. Select the required Wallboard. If it is not visible, click on any '+' symbols to expand the view until the Wallboard required is visible and click on it.
4. Click the **Select** button.

To display a message on a PC Wallboard:

1. Select the PC Wallboard option. A maximum of 250 PC Wallboards can concurrently be connected to a single Wallboard Server.
2. If you know the required directory number, type it in the text box and then click *Finish*; or
3. If the required directory number is not known, click *Agent ID*, **DN Search** screen appears. You can only select Agent(s) and Agent Group(s) from this screen. Select the required number and then Click *Finish*; or
4. Click *Active PC WB* and select the required PC Wallboard. Click *OK* and then click *Finish*.

Note: If there are no PC Wallboards listed there are no PC Wallboards logged on. You will need to launch the application.

Alarm Messages

General

Alarm Messages can be created/edited, deleted, and stored in the alarm messages library. These messages are accessible from other CCM applications, e.g. Call Center View.

Note: Wallboard Client does not support this feature.

When creating/editing an alarm message, the user must ensure the text format, colors and effects are distinctive for alarms.

1. From the **File** menu, and select **Alarm Messages**.
2. To **add alarm messages** follow the procedures as detailed in "Create a Message" on page 8.
3. To **Edit alarm messages** follow the procedures as detailed "Edit Message" on page 14.
4. To **Delete alarm messages** follow the procedures as detailed in Delete Message on page 14.

Alarm Setting

General

Alarms received from other applications are classified as Emergency, Alarm and Standard alarm types. Their priority level is set within the Wallboard Server application.

This section enables you to select the text format for each type of received alarm message(s) to be displayed on the device(s).

The Alarm categories are:

- Emergency: Currently not implemented.
- Alarm (Critical, Caution, and Normal): Alarms received from the Call Center View application.
- Standard: Standard Send Message received from the Call Center View application.

Notes:

1. To display Alarms, you must ensure Forward Alarms has been checked within the Call Center View application.
2. Wallboard Client does not support this feature.

Alarm Message







When an Alarm message is received from another application, it will be displayed on the selected Wallboard device.

1. From the **File** menu, select **Alarm Setting**, then from the Remote Message Properties, select **Alarm**. Click **Next** and then select the required Wallboard device destination.
2. Click **Next** to specify whether to display the message on the top line, bottom line (single height), or double height of a Wallboard.

You can apply character formats to the text (e.g. bold, flashing or inverse).

You can also change the color of the text to be displayed on the Wallboard device.

Preview and **Color Preview** show the format and color of the **Alarm Message** to be displayed on the selected Wallboard device.

- To format the characters, click any of the option(s) as required i.e.  **B** **Bold**,  **F** **Flashing** and  **I** **Inverse**.
- To alter the display line of text, click:  **Top line**,  **Bottom line** and  **Double Height**. By default, double height is selected.
- To change the color of the characters on the Wallboard device, click the  pull down arrow associated with **Color**. Select from the listed options.
- To save the settings, click the **Finish** button. The wizard is rotated to the first *Remote Message Properties* screen.

Standard Message







When a Standard Alarm message is received from another application, it will be displayed on the selected Wallboard device.

1. From the **File** menu, select **Alarm Setting**.
2. From the Remote Message Properties, select **Standard**.
3. Click **Next** and then select the required Wallboard device destination.
4. Click **Next** to specify whether to display the message on the top line, bottom line (single height), or double height of a Wallboard.

You can apply character formats to the text (e.g. bold, flashing or inverse).

You can also change the color of the text to be displayed on the Wallboard device.

Preview and **Color Preview** show the format and color of the **Standard Message**, as it will be displayed on the selected Wallboard device.

- To format the characters, click any of the option(s) as required i.e.  **B** **Bold**,  **F** **Flashing** and  **I** **Inverse**.
- To alter the display line of text, click:  **T** **Top line**,  **B** **Bottom line** and  **D** **Double Height**. By default, double height is selected.
- To change the color of the characters on the Wallboard device, click the pull down arrow associated with **Color**. Select from the listed options.
- To save the settings, click *Finish*. The wizard is rotated to the first **Remote Message Properties** screen.

Template Distribution

Administrators can create a PC Wallboard profile to send to individual agents, individual groups or multiple groups.

To distribute templates:

1. From the **Edit** menu, select **Templates** and click on **Distribute**.
2. A list of agents with saved templates will be shown in a tree format. Double click on the agent to reveal saved-template names.
3. Select the required template and then click on the 'right' arrow button (➤) to add the template to the list of templates to be distributed.
4. Click on the Destination tab.
5. Highlight the required agents and/or groups to send the template to and then select the 'right' arrow button (➤). The agents and/or groups will show in the right-hand section of the form.
6. Click on the **Distribute** button to copy the new template to the agent/group of agents selected.

Note: If the Wallboard server has recently been started, it is possible that it will not show a full list of agents/groups. Update the list by clicking on the Refresh Dns button.

When an agent opens a template that has been sent, all the Dn information is translated to make it relevant to that agent as agents are only able to monitor their own Dn.

The example below shows what would happen if Agent 4321 created a template, and it was subsequently loaded by Agent 4200 after being distributed. Only the Agent Dn settings are translated.

Agent 4321	
Dn: 4321 Var: Answered	Dn: 4321 Var: Lost
Group Dn: 700 Var: Presented	Group Dn: 701 Var: Lost

Agent 4200	
Dn: 4200 Var: Answered	Dn: 4200 Var: Lost
Group Dn: 700 Var: Presented	Group Dn: 701 Var: Lost

Note: The 'hot-desking' approach to the PC Wallboard has been maintained by sending all available templates to the PC Wallboard on starting up.

Wallboard Client

Starting the Wallboard Client

To start to Wallboard Client:

1. Ensure that the Delta Server is running.
2. Ensure that the Wallboard Server is running.
3. Ensure that you are logged onto the INDeX Taskbar
4. Click the **Start** button on the Windows taskbar.
5. Point to **Programs** and then the **INDeX CCM**.
6. Click **Wallboard Client** from the sub-menu.

The Wallboard Client will automatically connect to the last known Delta Server if you are not using the Wallboard Server for the first time, and in the splash screen, the *Reconnect to last known Delta Server* option is selected.

If you are using the Wallboard Client for the first time, or if in the splash screen, the *Reconnect to last known Delta Server* option is not selected, then the Search screen appears indicating the Wallboard Server is searching for the Delta Server(s). Once the Delta Server(s) have been located the Find Server screen appears.

1. Select the required Delta Server, then click the **Connect** button.
2. If your required Delta Server is not listed, click the **Advanced** button then:
 - a) Select one of the options of where to search for the server.
 - b) Click the **Search** button.
 - c) From the listed Delta Server(s), select the required server.
3. Click the **Connect** button.

Note: The Wallboard Server and a Wallboard Client cannot run on the same PC.

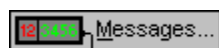
Managing Wallboard Client

Using the Wallboard Client you can:

- Create customized variable as detailed in "Summary Variable" on page 13;
- "Create a Message" on page 8;
- "Edit Message" on page 14;
- "Delete Message" on page 14;
- "Schedule a Message" on page 15 ;
- "Delete Scheduled Messages" on page 24;
- "Refresh Schedule" on page 24;
- "Find Server" on page 24.

The Scheduled messages are listed on the main Wallboard Client screen. It displays the number of Scheduled Messages, their individual status and settings.

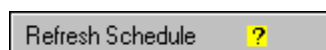
The command buttons on the toolbar are:



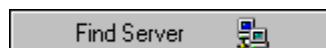
– Enables you to Add and Schedule Messages



– Deletes the selected Scheduled Message



– Receives an update listing of the Scheduled messages from the Wallboard Server. It is automatically refreshed every 30 seconds.



– Searches and lists all available Wallboard Servers to which the Wallboard Client may connect.

Schedule List

The scheduled messages are listed on this screen. A total number of 100 messages can be scheduled. For further details see Schedule List on page 7.

Status **Active** indicates the Scheduled Message is being displayed on the Wallboard device, however this depends upon the priority level of the message.

Status **Inactive** indicates the Scheduled Message is currently not displayed on the Wallboard device.



Menu Bar Options

- **File** menu incorporates the following options:
 - Messages:** Enables you to Add, Edit and Delete Messages;
 - Alarm Messages:** The Wallboard Client does not support this option;
 - Alarm Settings:** The Wallboard Client does not support this option;
 - Exit:** Enables you to exit the Wallboard Client.
- **Edit** menu incorporates the following options:
 - Summary Variables:** Enables you to create a customized variable, assigning any of the available variable data to a multiple number of directory numbers;
 - Delete Messages:** Enables you to delete Scheduled messages.
- **Setup** menu incorporates the following options:
 - Language:** Enables you to select the required language, the Wallboard Client will automatically change to the selected language.

Note: The Wallboard Client does not support Devices menu option.

Delete Scheduled Messages

Any User may delete messages from the Schedule List where the respective User or lower Access Level has scheduled those messages. A User may **Not** delete messages scheduled by peers or Users of a higher Access Level.

The Delete  button is enabled once you have selected a Scheduled Message. To delete Scheduled Message(s), select the message, then click .

1. Click **Yes** to Delete the selected scheduled message.
2. Click **No** to close the dialog box.

Refresh Schedule

By default, the Scheduled Messages are updated every 30 seconds. However if there are more than one Wallboard Client connected or there are several Scheduled Messages, then this delays the process of updating the Scheduled Message List of every Wallboard Client on the network.

To receive an up to date list of the Scheduled Messages from the Wallboard Server, click *Refresh Schedule*.

Find Server

This option enables you to connect to a different Wallboard Server.

1. Click *Find Server*, and then click *No* to remain connected to the current Server.
2. To connect to a different Server, click **Yes**, and follow step 6 as detailed in Starting the Wallboard Client on page 22.

PC Wallboard

General

The PC Wallboard allows full Wallboard functionality to be displayed on a Windows PC. Messages are scheduled on the PC Wallboard via the Wallboard Server.

The PC Wallboard operates in two modes:

- **Enhanced Compact Contact Center agent mode.**
The agent must be logged on to the Telephone system prior to invoking the PC Wallboard. The agents log on to the PC Wallboard using their individual agent logon ID. The currently logged on agent has the ability to view their own personalized configuration of the contact center consisting of up to 20 contact center variables as well as the scheduled messages;
- **Standard User mode:**
Displaying only the scheduled messages received from the Wallboard Server/Client applications. In this mode you logon to the PC Wallboard using an alphanumeric text. If the PC Wallboard application is minimized, every time a message of a priority greater than 6 is in Active status, the message will pop up into the display.

A maximum of 250 PC Wallboards can concurrently be connected to a single Wallboard Server (which must be running to enable PC Wallboard).

Starting PC Wallboard

Before starting the PC Wallboard, you **MUST** ensure that the Wallboard Server is running and that you have logged on to the Telephone system. Consult your system supervisor concerning the Wallboard Server, the name of the PC running the Wallboard Server and your login ID.

To start the PC Wallboard:

1. Click the **Start** button on the Windows taskbar.
2. Point to **Programs** and then th **INDeX CCM**.
3. Click **PC Wallboard** from the sub-menu.
4. Type the Login ID and the name of the PC hosting the Wallboard Server. The Login ID can either be:
 - An **agent's directory number** (e.g. 5001), enabling you to select and monitor agent's variables;
 - An **alphanumeric text** (e.g. PCW01); enables you to use the PC Wallboard as a display device. In this format, only the Message Display bar will be displayed.
5. Click **Login**. A blank PC Wallboard display panel is shown.

Menu Bar Options

File menu incorporates the following options:

- New:** Enables you to select a template. PC Wallboard provides 7 templates which can be customized and saved as a new template;
- Save:** Ensures that changes made to the current user interface are saved.
- Save Template as:** Enables you to save the current customized template under a different name;
- Exit:** Enables you to exit the PC Wallboard.

View menu incorporates the following options:

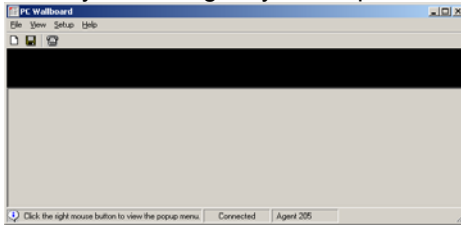
- Toolbar:** Allows you to toggle between hide or display the Toolbar;
- Status Bar:** Allows you to toggle between hide or display, The Status Bar provides information about which directory number is being monitored and if the connection is established as well as the current data and time;
- Always on Top:** Allows you to toggle between On or Off. If this option is selected, the PC Wallboard is always on top of all the other active Windows applications;
- Compact:** Allows you to use the PC Wallboard as a display device. You can use your right hand button and select Restore, or double click the display bar to restore to full screen;
- Callback Requests:** Displays a list of Callback Request messages actioned from the Call Center View.

Setup menu incorporates the following options:

- Language:** Enables you to select the required language, the PC Wallboard will automatically change to the selected language.

Templates


When you first log in, you are presented with an empty display panel.



You can **either**
Use an available pre-set template
or

Customize the blank display panel and create a new template (see *Customizing Blank Display Fields*, on page 28).

To open a pre-set template:

1. From File menu select **New** (or click the icon ) on the toolbar.
2. Select from the list of pre-set templates and click **OK**.

To customize an existing template or create a new template:

1. Right click, within an existing display field, to display the following options.

Properties:

You will either be presented with the Marquee or General properties menus.

Variables:

When you choose this option you will be able to select the variables that you want to view on your PC Wallboard.

Remove:

If you select this option, you will remove the selected pane.

Marquee Display Properties

Right click anywhere on a text display field and select **Properties** to display the Properties/Marquee menu.

You can change the number of times the message scrolls (if the style is set to Scroll) as well as the pause time between each scroll. You can also change background color and the font of the message.

General Display Properties

Right click anywhere on an LED display field and select **Properties** to display the Properties/General menu.

You can change the number of LED digits, the decimal size, the number of decimals as well as the decimal position. You can also select a different on, off and/or background color of the LED digits.

Customizing Blank Display Fields.

If you right click in a blank display field, you get the following choices.

Split Pane:

Horizontally – New pane on Top or Bottom.

Vertically – New Pane on Left or Right.

Remove Pane: Removes the selected pane.

Display Setup Wizard: This option invokes the wizard to select the agent's variable.


Display Setup Wizard

Display Setup Wizard enables you to configure the selected panel to display the variable data for the current logged on directory number. The panel can be configured to display up to 20 variable data fields.

To configure a blank display field:

1. Click the right hand mouse button on a blank display field and from the available menu options, select Display Setup Wizard.
2. The available field options are:
 - Marquee:** Displays a horizontally scrolling text message;
 - LED:** Displays the message in digital layout.Select the required field.
3. Click **Next** to proceed to select the required **Variable**.
From the pull down list, select one of the variables, e.g. Answered All, Calls Waiting, etc.
4. Select (put a tick in the box) as required from the following options:
 - Popup if Value Changes:**
If the PC Wallboard is minimized, when the value of a variable changes, then this will cause the PC Wallboard screen to pop-up (i.e. maximize) with the variable value flashing.
 - Maximize Message Bar:**
When the PC Wallboard is running in '*compact mode*,' i.e. with only the Message Bar being displayed, then, when the value of a variable changes, this will cause the PC Wallboard screen to pop-up (i.e. restore) with the variable value flashing.
5. Click **Refresh** to ensure all the available directory numbers are listed. Click **Next** to select the required directory number.
6. Select the position of a label if one is required; modify the label message as required and then click **Finish**.

Callback Request Messages

When you receive a Callback Request message from the Call Center View, the Callback Request button on the toolbar flashes . Click the button and the Callback Requests screen appears, listing the Callback Request message(s).

You must enter the Digit(s) required for accessing the outside line. This number is configured within the telephone system.

The Callback Request command buttons are:



Make Callback: Click a callback message and then click **Make Callback** to make the call.



Callback Succeeded : If the called party is the intended recipient, then during the call, click **Callback Succeeded**. This is for historic report purposes to indicate the callback was successful. Further details are available from the Agent Callback Request Report.



Callback Failed : If the called party is not the intended recipient, the line was busy or no answer, then during the call, click **Callback Failed**. This is for historic report purposes to indicate the callback was not successful. Further details are available from the Agent Callback Request Report.



Clear Callback : When you have finished with the call, you must click **Clear Callback** to inform the Contact Center View Supervisor you have responded to the callback message. **Cleared** will be displayed in the Callback Request screen within the Contact Center View application.

The information on the screen is:

Information	Description
CLI	Number to call
Time	Time the callback Request message was sent from CCV
Date	Date the callback Request message was sent from CCV

Display Field/Message Bar Properties

Embedded with every selected Display Field as well as the Message Bar, there is a Properties screen. This also applies to the Label of the Display Field. Using the Properties option, you can customize the look and feel of the selected section.

Message Display Bar Properties

Right click (using right hand mouse button) anywhere on the Message Display Bar and select **Properties** from the available commands, the Properties screen appears.

Configure the required features.

You can change the number of times the message scrolls as well as the pause time between each scroll. You can also change the background color together with the font of the message.

Marquee Display Properties

Right click (using right hand mouse button) anywhere on the Display Field (Marquee) and select **Properties** from the available commands, the Properties screen appears.

Configure the required features.

You can change the number of times the message scrolls (if the style is set to Scroll) as well as the pause time between each scroll. You can also change background color and the font of the message.

LED Display Properties

Right click (using right hand mouse button) anywhere on the Display Field and select **Properties** from the available commands, the Properties screen appears.

Configure the required features.

You can change the number of digits, the decimal size, the number of decimals as well as the decimal position. You can also select a different background color and the color of the digits.

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