



# MaxInSight

User Manual

MaxACD 7.1

June 2019

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# Overview and Installation

Altigen MaxInSight is a workgroup performance application. It provides call center managers and agents with the ability to track workgroup status and performance data from a wall-mounted LCD panel or from their computers.

MaxInSight includes the ability to see the following for single or multiple workgroups:

- Real-time queue status
- Real-time workgroup resource status
- Daily operation results
- Trends of data over time

Users can configure:

- Several types of data displays, or views
- Alerting thresholds
- The display interval for different workgroups' statuses when those workgroups are configured into in a single template
- Character font size and color
- The MaxInSight skin

MaxInSight runs with the MaxACD server.

## New Features in This Release

The following new features were introduced in QuickFix 7.0.0.821, and are included in Release 7.1:

- A new Display Name field (two lines) for Multiple Workgroup view
- A configurable width for the Workgroup Name column
- A larger dialog box to accommodate longer workgroup names
- Automatic loading of all workgroups into the list in the Monitor Workgroup dialog box
- Support for adding and loading screen layouts

# Licensing

MaxInSight requires an Altigen MaxInSight license.

# System Requirements

The following Windows operating systems are supported:

- Windows 10
- Windows 8.1 64-bit

Minimum system requirements:

- 1GHz CPU or faster
- 10G hard drive disk space
- 2GB RAM
- SVGA monitor (1024x768) with 256-color display, or better
- Keyboard and mouse

# Pre-Installation Checklist

Before installing MaxInSight, make sure the following is done:

- MaxACD 7.1 has been installed on the system server
- The MaxInSight License key has been installed and activated on the system server.
- Your system is able to connect to the MaxACD server
- The person installing MaxInSight has local administrator rights on your system
- The Microsoft Lync client or Skype for Business client has been installed on your system

# Installing MaxInSight on a Client System

When the above items are done, follow these steps on the client machine:

1. Close all Windows applications.
2. Load the MaxACD installation media.
3. Open the **MaxInSight** folder and run the **Setup** program in that folder, following the step-by-step instructions.

If your system administrator has loaded MaxInSight on a shared network server, you can copy the files in the MaxInSight folder to your desktop computer, and run the MaxInSight **Setup** program from there.

## Uninstalling MaxInSight

1. To uninstall MaxInSight,
  1. From the Windows **Start** menu, select **Control Panel > Add/Remove Programs > MaxInSight**.
  2. Click **Remove** and respond to any additional prompts.

## Operational Limitation

- User passwords must be 30 characters or less in length. If an user's password exceeds 30 characters, the user may get an error while trying to log in, indicating that the password is invalid.





## Getting Started

MaxInSight is a workgroup performance application. It provides call center managers and agents with the ability to track workgroup status and performance data from a wall-mounted LCD panel or from their computers.

Start MaxInSight from the **Start** menu by choosing **Start > Programs > All Programs > MaxInSight > MaxInSight**.

This section includes the following topics:

- *Logging In* on page 5
- *The MaxInSight Window* on page 6
- *Making Workgroups Available for Monitoring* on page 7
- *Arranging the Display* on page 8
- *Changing the Skin* on page 9

## Logging In

Follow these steps to log into MaxInSight.

1. Enter the system server's IP address. (To obtain this information, ask your IT administrator.)



The screenshot shows the MaxInSight login dialog box. At the top left is a purple triangle logo with a pair of binoculars. To the right of the logo is the text 'MAXINSIGHT' in a blue, serif font. In the top right corner is the Altigen logo. Below the logo and title are three input fields. The first is labeled 'ACD server address' and contains the text '10.30.5.13'. The second is labeled 'Sign-in address' and contains 'racrun@alticloud.com'. The third is labeled 'Password' and contains a series of asterisks. Below the password field is a checkbox labeled 'Always Save Password' which is checked. At the bottom of the dialog are two buttons: 'Sign in' and 'Cancel'.

Figure 1. The MaxInSight login window

2. Enter your UPN name (which may be different from your Windows Domain name), and your Windows Domain password.  
If you want to store your password and have it entered automatically the next time you log in, check the **Always save password** check box.
3. Click **Sign in**. A progress bar shows you the progress of the sign-in.  
If the login attempt fails, you will also need to enter the domain and user ID.

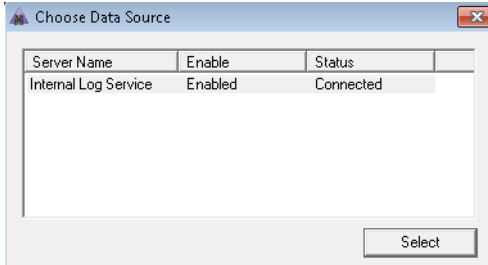


Figure 2. The Data Source window

4. In the dialog box, select a log service. Only enabled and connected log servers are shown. (The number of entries listed in the list depends on the number of logger servers installed with the MaxACD server.)

## Reconnecting

If the connection with the server is lost, a message asks if you want to connect again. After you click **OK**, the application closes; you will need to restart MaxInSight.

## The MaxInSight Window

Once you log into MaxInSight, a blank window opens. It has a menu bar at the top, containing **Configure**, **Add**, **View**, and **Help** menus.

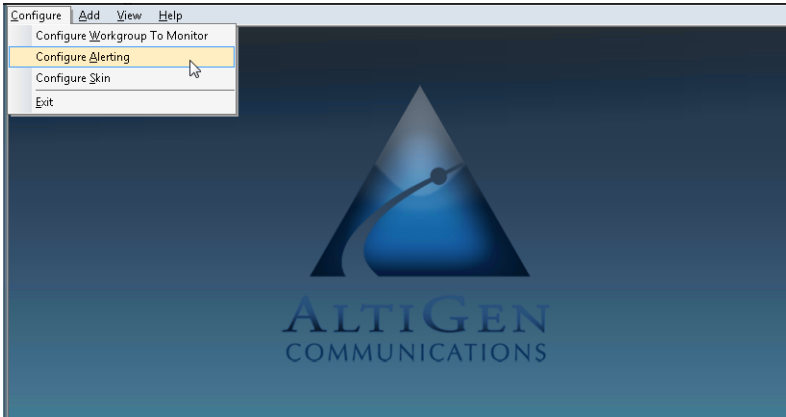


Figure 3. Main window with the Configure menu open

MaxInSight remembers the workgroups you enable, along with the configuration and position of views. When you log in again, the remembered workgroups are enabled automatically, and the views are displayed as they were when you logged out.

## Making Workgroups Available for Monitoring

To specify a workgroup to monitor, choose **Configure > Configure Workgroup to Monitor**.

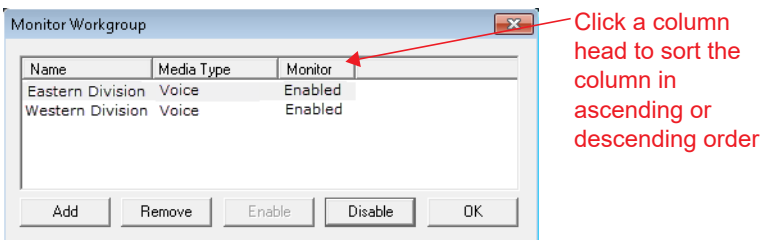


Figure 4. The Monitor Workgroup window with two workgroups

To add a workgroup,

1. Click **Add**.
2. Specify the following options and then click **OK**:
  - Enter the workgroup name and password
  - Check the **Enable** option

- (Optional) Specify a *Display Name*; two lines are available. Your entries will appear in the *Monitor Workgroups* view. Adding a unique Display Name allows you to view a shorter and/or more intuitive name than the actual workgroup name.

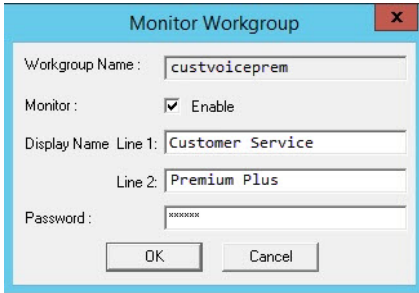


Figure 5. The Monitor Workgroup dialog box

To disable a workgroup, select it and click the **Disable** button. Workgroups that you disable will *not* be available in other MaxInSight configuration screens.

To remove a workgroup from the list, select it and click **Remove**.

## Arranging the Display

After you have configured views (see *Configuring Data Displays* on page 11), you can control the MaxInSight display with the following methods.

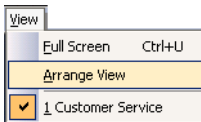


Figure 6. The View menu

- Using commands on the **View** menu (and keyboard equivalent):

**Full Screen** enlarges a view to fill the screen and hides the MaxInSight title bar and menus. To get the MaxInSight main window and its menus back, press **Ctrl+U** (**Ctrl+U** is a toggle) or the **Esc** key. You can also right-click on the border of the MaxInSight screen (*not* within a view) and choose **View > Full Screen/Restore**.

**Arrange View** fills the MaxInSight window with an orderly distribution of each view. See Figure 7 for an example.

The bottom of the View menu lists your current views. The view appearing first in your display is checked. To make another view the first displayed, click it in the menu list, and then choose **View >**

## Arrange View.

- Using commands on the right-click menu: in some situations, the commands are **Minimize**, **Maximize**, **Restore**, **Close**, and **Arrange**.
- Moving the windows in the standard Windows fashion:

**Resize** the MaxInSight window and view windows by placing the cursor at a window edge or corner, then drag the window to the size you want.

**Move a window** by clicking and dragging its title bar.

**Dismiss a window** by clicking the close button in the upper right corner.

**Minimize a window** by clicking its **Minimize** button.



Figure 7. Choosing **View > Arrange View** to show five views

## Changing the Skin

You can select a skin for MaxInSight. The skin defines the title bar and border of the main MaxInSight window and view windows. Choose **Configure > Configure Skin**.

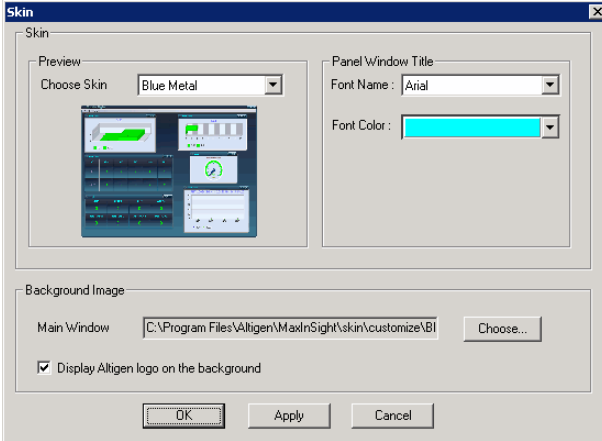


Figure 8. The Configure Skin dialog box

In this dialog box, you can

- Select a skin (the display in the dialog box changes to show what the skin looks like)
- Specify a font and the color for the title window of views
- Specify a background image for the main window (click **Choose** to open a dialog box). Choose a .bmp image file from any folder, and click **Open**.
- Remove the Altigen logo from the background of the Main window by clearing the **Display Altigen logo on the background** check box.

# Configuring Data Displays

After you have enabled the workgroups you want to monitor (**Configure > Configure Workgroup to Monitor**), you can then configure the data displays you want to see.

## Configuring Workgroup Data Displays

You can display rows of workgroup data in the following ways:

- One workgroup only
- Multiple workgroups in rotating views, one workgroup at a time
- Multiple workgroups on display at the same time

In addition to row views, you can also create gauge views, time line views, and bar views.

You can configure individual fields to alert you when specified thresholds are reached. See Figure 23.

## Setting a Single Row-Type Display

To configure a row view for a single workgroup or multiple workgroups in a rotating display, choose **Add > Add Single Workgroup View**.

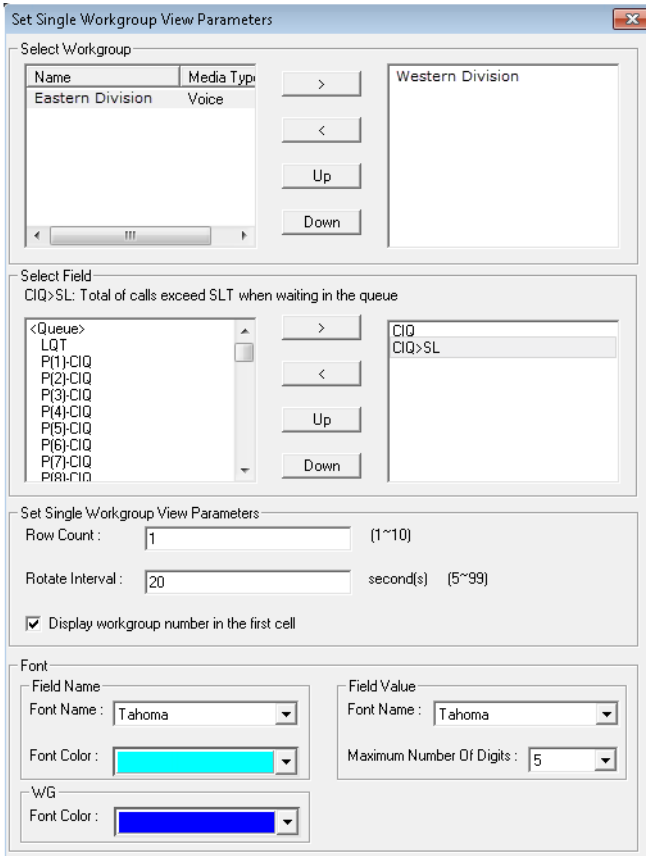


Figure 9. Configuring single-workgroup view

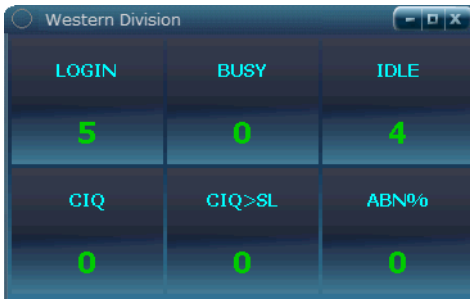
1. To select a workgroup, highlight it and click the Right-arrow button. You can select multiple workgroups to monitor, but in this configuration only one workgroup view at a time is displayed. When multiple workgroups are selected, the data of each one is displayed in rotation. You can specify the order of the rotating display by arranging the order of the selected workgroups: highlight a workgroup and click the Up or Down arrow button to move it to where you want it.
2. Select the fields you want to monitor. The fields are arranged in three categories: Queue, Workgroup, Agent. To see an explanation of each field (appearing just above the fields list), highlight the field.

Use **Shift+click** to select multiple adjacent fields. Use **Ctrl+click** to select multiple non-adjacent fields. Then click the Right-arrow to move them to the right column. To remove fields, select them and click



the Left-arrow button. You can change the order of selected fields by highlighting a field and clicking the **Up** or **Down** buttons.

3. In the **Row Count** field, specify the number of rows to use to display the fields you have selected. In the following example, six fields were selected, and **Row Count** was set to **2**:



| LOGIN | BUSY   | IDLE |
|-------|--------|------|
| 5     | 0      | 4    |
| CIQ   | CIQ>SL | ABN% |
| 0     | 0      | 0    |

In this example, data displays in two rows.

Figure 10. Configuring single-workgroup views

4. If you have selected more than one workgroup, specify in the **Rotate Interval** field how many seconds you want to display one workgroup view before MaxInSight rotates to the next group's view.
5. In the Field Name panel, specify a font and a color for the field names.
6. In the Field Value panel, specify a font and the maximum number of digits to display in a field. If the field value is more than the maximum number of digits specified, then "?" will be displayed. For example if the maximum number of digits is set to **2** but the field value is **123**, then the content display on the view will be "**1?**".  
**Note:** Font *color* for the field value is set in the Alerting Configuration dialog box (**Configure > Configure Alerting**).
7. In the WG panel, specify a color for the workgroup number.

## Setting Concurrent Row-Type Views of Multiple Groups

To configure simultaneous row views of multiple workgroups, choose **Add > Add Multiple Workgroup View**. The configuration window for multiple workgroup views is similar to that for a single workgroup display.

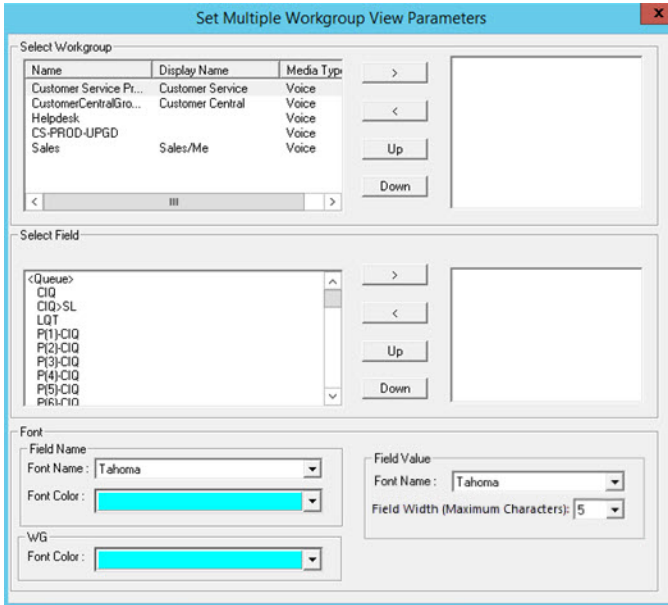


Figure 11. Configuring multiple-workgroup view

To configure this view, see the steps in *Setting a Single Row-Type Display* on page 11.

In a multiple workgroup view, each workgroup's data is displayed in a separate row. The first column displays the name of the workgroup.

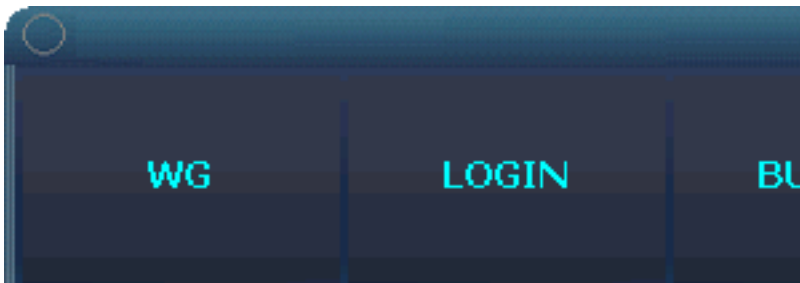


Figure 12. Data from two workgroups, each in its own row

## Setting Other Data Displays

In addition to the basic row views, you can configure four other views:

**Gauge** – Shows the real time status of a single data value in a dial format.

**Timeline** – Shows trends of data elements over time. The data points are plotted on the graph and connected with lines.

**Vertical or Horizontal Bars** – Shows one field of either one workgroup or multiple workgroups in a vertical or horizontal bar view. This view reflects either historical data or real time data, whichever you specify.

## Gauge View

A gauge view displays the status of a single field in an easy-to-read dial format. With a gauge view and with alerting configured, it's easy to see, for example, whether service level is normal or too low, the number of callers in queue is too high, or queue time is too long.

To set parameters for a gauge view,

1. Choose **Add > Add Gauge View**.

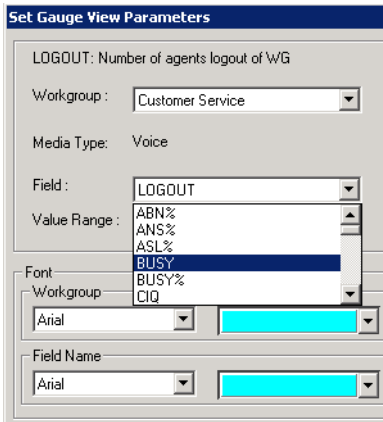


Figure 13. Configuring Gauge views

2. Specify the workgroup, the field to track, and a value range.  
**Note:** Only the fields appropriate to a gauge view are available
3. Select a font and a color for the workgroup and for the field name. Click **OK**.

A gauge view is displayed similar to the following:



Figure 14. Gauge view showing % of calls in error

## Time Line View

A time line view is used to display trends of data elements over time. The data points are plotted on a graph and connected with lines.

To set parameters for a time line view,

## 1. Choose **Add > Add Time Line View**.

The screenshot shows a dialog box titled "Set Time Line View Parameters". It has several sections:

- Current Data Source:** Internal Log Service
- Select Workgroup and Field:** A table with columns "Name" and "Media Type". To its right are buttons for ">", "<", "Up", and "Down".
- Selected Workgroup:** Western Division. Below it is a "Set Color" button.
- INCALL:** Total workgroup inbound calls
- Select Field:** A dropdown menu with "INCALL" selected.
- Value Range:** Two input fields with "0" and "100" respectively, separated by a tilde (~).
- Select Statistic Period:** A radio button for "Last" followed by a dropdown with "1" and "Hour(s)". Below it are "From" and "To" dropdown menus.
- Set Interval:** A dropdown menu with "15 Minutes" selected.

Figure 15. Configuring Time Line views

2. Select one or more workgroups. To select a workgroup, highlight the workgroup name and click the Right-arrow button.
3. To specify the color of the lines, highlight a selected workgroup, click **Set Color** and choose a color. Repeat for each additional workgroup.
4. From the **Select Field** drop-down list, select a field to chart. Only the fields of data from the logger service you specified at login will appear in the drop-down list. (The logger service is shown in the **Current Data Source** field.)
5. In the **Value Range** fields, specify a value range for the field you want to chart.
6. Specify the period for which you want to display statistics: either the last x hours (select from 1-24), or a time period you specify in the **From** and **To** fields (24-hour clock). Be sure the time you select in the **From** field precedes the time you select in the **To** field.
7. Select a time interval: 15 minutes, 30 minutes, or one hour.
8. Click **OK**. A time line view opens. The workgroup numbers and display colors are shown at the top.

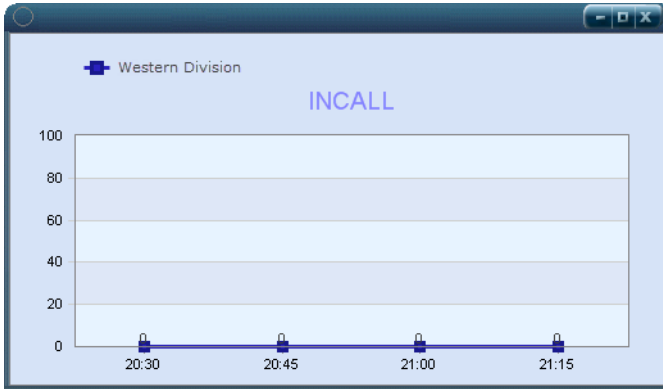


Figure 16. Time Line View showing number of incalls every 15 minutes for the last hour

## Bar Views - Vertical and Horizontal

You can display one selected field of multiple workgroups in a bar view that shows either historical data or real time data.

1. Choose either **Add > Add Vertical Bar View** or **Add > Add Horizontal Bar View**.

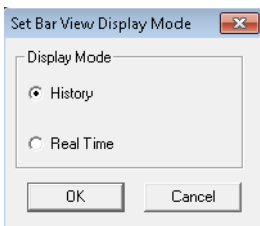


Figure 17. Choosing a bar view

2. Select **History** to display historical data, or select **Real Time** to display real time data, and click **OK**.

If you selected **History**, another window opens:

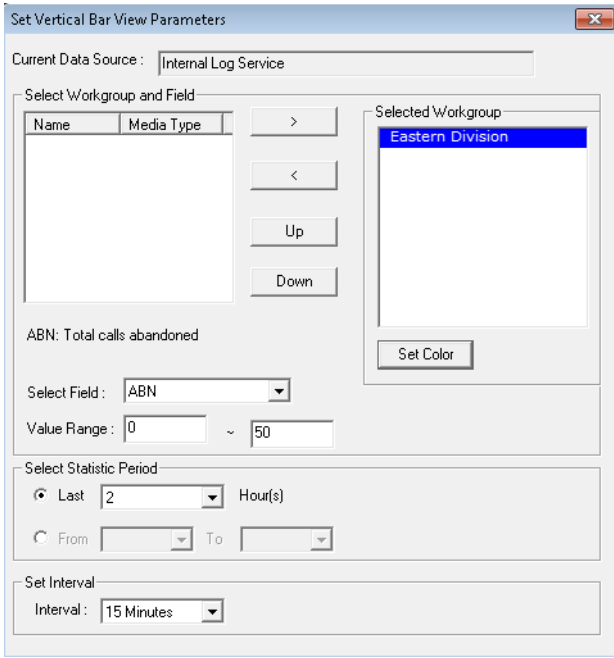


Figure 18. Configuring Bar views

1. Select one or more workgroups. To select a workgroup, highlight the workgroup name and click the Right-arrow button.
2. To specify the color of the bars, highlight a workgroup, click **Set Color** and choose a color. Repeat for each workgroup selected.
3. To change the order of workgroups in a view, highlight a selected workgroup and click the **Up** or **Down** button.
4. Select a field to chart from the **Select Field** list. Only the fields of statistics data from the logger service you specified at login will appear in the drop-down list. (The logger service is shown in the **Current Data Source** field.)
5. In the **Value Range** fields, specify a value range for the field you want to chart.
6. Specify the period for which you want to display statistics: either the last x hours (select from 1-24), or a time period you specify in the **From** and **To** fields (24-hour clock). Be sure the time you select in the **From** field precedes the time you select in the **To** field.
7. Select a time interval for display: 15 minutes, 30 minutes, one hour.

8. Click **OK**. A bar view opens. Workgroup numbers and their display colors are shown at the top.

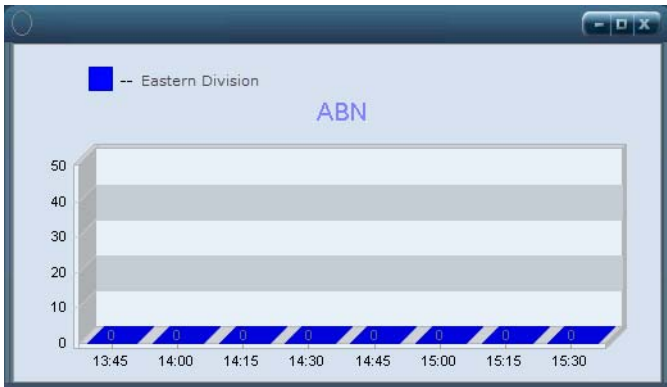


Figure 19. A vertical bar view showing history data for abandoned calls. (No calls were abandoned.)

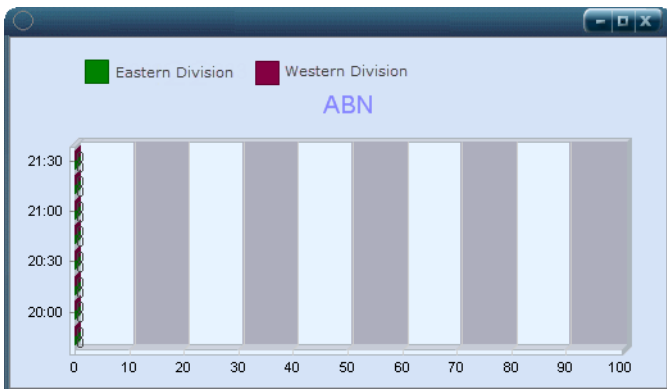


Figure 20. A horizontal bar view showing history data for abandoned calls. (No calls were abandoned.)



If you selected **Real Time** in the Bar View dialog box, another window opens:

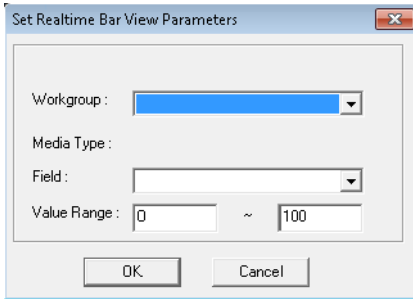


Figure 21. Configuring Real time bar views

1. Select a workgroup.
2. Select a field to view.
3. Specify a value range for the field you want to view.
4. Click **OK**. A bar view is displayed. The workgroup name and display color are shown at the top.



Figure 22. Horizontal bar showing number of abandoned calls for a workgroup. (No calls were abandoned.)

## Changing the Parameters of a View

To change the parameters of a view you're displaying in MaxInSight, right-click the view, and choose **Modify View Parameter**. Make your changes in the Parameters dialog box and click **OK**.

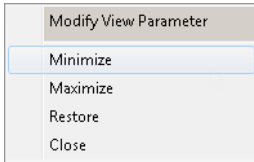


Figure 23. The right-click menu

## Configuring Alerts

For each field you're interested in tracking, you can choose to be alerted when data in the field crosses a threshold you specify (a *warning* threshold and a *critical* threshold). MaxInSight alerts you through a different color display and, optionally, by playing a sound file.

To configure alerts for a field,

1. Choose **Configure > Configure Alerting**.

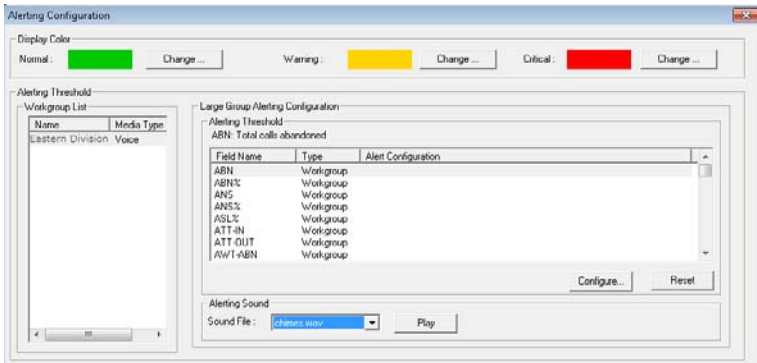
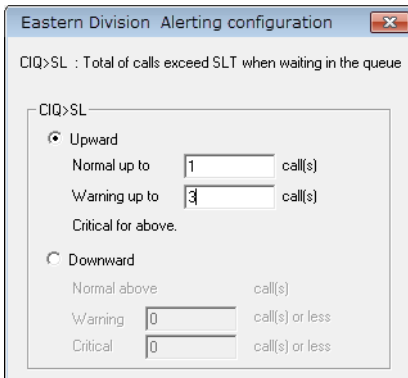


Figure 24. Configuring alerts

2. Select the display colors you want to use for normal, warning and critical levels. By default, green represents normal level, yellow represents warning level, and red represents critical level.
3. Select a workgroup in the Workgroup List, and then select a field on which you want to set the threshold for the three levels.

**Note:** To arrange the **Name**, **Field Name**, or the **Type** columns in ascending or descending order, click the column heading. Click again to reverse order.

4. Click the **Configure** button or double-click the field. The configuration window for the selected workgroup opens:



The workgroup name

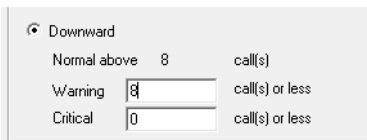
← The field you selected is described here

The dialog box varies, depending on the field you selected

Figure 25. Configuring upward alerts

5. Select **Upward** or **Downward**, as appropriate, configure the field's thresholds, and click **OK**.

**Note:** If you select **Downward**, the **Normal above** field is filled in automatically when you specify the warning level. For example:



When **8** was entered in the **Warning** field, **8** appeared automatically in the **Normal above** field

Figure 26. Configuring downward alerts

6. If you want, configure an alerting sound to be played when the field value falls into the warning or critical level. To do so, select a file from the **Sound File** list. You can click the **Play** button to preview the sound.

**Note:** Wave files are stored in the WAV folder under the MaxInSight folder. You can add your own sound file to this folder, and it will appear in the selection list. The duration of your sound file should be less than 5 seconds.

**Note:** Only one sound file can be used per workgroup.

7. When you are finished configuring, click **OK**.



In this view, alerting parameters are set to: 10 calls in queue is normal, 11-13 CIQ is at the warning level, more than 13 CIQ is at the critical level

Figure 27. A gauge view with alerting parameters set

## Clearing an Alert Threshold Configuration

To quickly clear an alert threshold configuration on a field, open the Alert Configuration dialog box (**Configure > Configure Alerting**), select the workgroup and then the field whose configuration you want to clear, and click the **Reset** button.

## List of Fields

The following tables show all the fields supported in MaxInSight. They also show what fields are available to what kinds of views. (In the tables, *Numeric* means single workgroup view and multiple workgroup view.)

| WG Queue RT Status: |   | Single Data/Multi-WG |       |           |        |        |
|---------------------|---|----------------------|-------|-----------|--------|--------|
| Abbreviation        | Description                                   | Numeric              | Gauge | Time Line | V. Bar | H. Bar |
| CIQ                 | # of Calls in Queue                           | YES                  | YES   | No        | YES    | YES    |
| CIQ>SL              | # of Calls in Queue > Service Level Threshold | YES                  | YES   | No        | YES    | YES    |
| QSL%                | % of Calls in Queue > Service Level Threshold | YES                  | YES   | No        | YES    | YES    |
| LQT                 | Longest Queue Time                            | YES                  | YES   | No        | YES    | YES    |
| VM                  | # of new VM in WG mail box                    | YES                  | YES   | No        | YES    | YES    |
| CIQ-P(n)            | # of Calls in Queue with Priority (n)         | YES                  | YES   | No        | YES    | YES    |

Table 1: Workgroup queue real time status fields

| Agent Availability Status: |                                      | Real Time |       |           |        |        |
|----------------------------|--------------------------------------|-----------|-------|-----------|--------|--------|
| Abbreviation               | Description                          | Numeric   | Gauge | Time Line | V. Bar | H. Bar |
| UNSTAFF                    | # of agents become virtual extension | YES       | YES   | No        | YES    | YES    |
| LOGOUT                     | # of agents logout of WG             | YES       | YES   | No        | YES    | YES    |
| LOGIN                      | # of agents log into WG              | YES       | YES   | No        | YES    | YES    |
| BUSY                       | # of login agents in connect state   | YES       | YES   | No        | YES    | YES    |
| IDLE                       | # of login agents in idle state      | YES       | YES   | No        | YES    | YES    |
| WRAPUP                     | # of login agents in wrap-up state   | YES       | YES   | No        | YES    | YES    |
| N-READY                    | # of login agents in Not-Ready state | YES       | YES   | No        | YES    | YES    |
| DND/FWD                    | # of login agents in DND/FWD state   | YES       | YES   | No        | YES    | YES    |
| ERROR                      | # of login agents in Error state     | YES       | YES   | No        | YES    | YES    |
| BUSY%                      | % of login agents in connect state   | YES       | YES   | No        | YES    | YES    |
| IDLE%                      | % of login agents in idle state      | YES       | YES   | No        | YES    | YES    |
| WRAPUP%                    | % of login agents in wrap-up state   | YES       | YES   | No        | YES    | YES    |
| N-READY%                   | % of login agents in Not-Ready state | YES       | YES   | No        | YES    | YES    |
| DND/FWD%                   | % of login agents in DND/FWD state   | YES       | YES   | No        | YES    | YES    |
| ERROR%                     | % of login agents in Error state     | YES       | YES   | No        | YES    | YES    |

Table 2: Agent availability status fields

| Daily Performance Statistic (since midnight) |   | Update every 15 min |       |           |        |        |
|--|---|---------------------|-------|-----------|--------|--------|
| Abbreviation                                 | Description                                     | Numeric             | Gauge | Time Line | V. Bar | H. Bar |
| INCALL                                       | Total WG Inbound calls                          | YES                 | No    | YES       | YES    | YES    |
| ANS  | Total Calls Answered                            | YES                 | No    | YES       | YES    | YES    |
| ABN  | Total Calls Abandoned                           | YES                 | No    | YES       | YES    | YES    |
| OFL  | Total Calls are Overflowed/Redirected           | YES                 | No    | YES       | YES    | YES    |
| AWT-ALL                                      | Average Wait Time for all WG Inbound Calls      | No                  | No    | YES       | YES    | YES    |
| AWT-ANS                                      | Average Wait Time for Answered Calls            | YES                 | No    | YES       | YES    | YES    |
| AWT-ABN                                      | Average Wait Time for Abandoned Calls           | YES                 | No    | YES       | YES    | YES    |
| AWT-OFL                                      | Average Wait Time for Overflow/Redirected Calls | No                  | No    | YES       | YES    | YES    |
| AHT  | Average Hold Time for Answered Calls            | No                  | No    | YES       | YES    | YES    |
| OUTCALL                                      | TOTAL OUTCALL : Total Outbound Calls            | YES                 | No    | YES       | YES    | YES    |
| ATT-IN                                       | Average Talk Time – Inbound Calls               | YES                 | No    | YES       | YES    | YES    |
| ATT-OUT                                      | Average Talk Time – Outbound Calls              | YES                 | No    | YES       | YES    | YES    |
| TCIQ   | Total Calls in Queue                            | YES                 | No    | YES       | YES    | YES    |
| MAXCIQ                                       | MAXCIQ : Maximum Calls in Queue                 | YES                 | No    | YES       | YES    | YES    |
| MAXQT  | MAXQT: Maximum Queue Time                       | YES                 | No    | YES       | YES    | YES    |
| ANS%   | % of Inbound Calls Answered                     | YES                 | YES   | YES       | YES    | YES    |
| ABN%   | % of Inbound Calls Abandoned                    | YES                 | YES   | YES       | YES    | YES    |
| OFL%   | % of Inbound Calls Overflowed/Redirected        | YES                 | YES   | YES       | YES    | YES    |
| TSL%   | Total Calls Service Level %                     | YES                 | YES   | YES       | YES    | YES    |
| ASL%   | Answered Calls Service Level %                  | YES                 | YES   | YES       | YES    | YES    |
| TCIQ%  | % of Total Calls in Queue since midnight        | YES                 | YES   | YES       | YES    | YES    |

Table 3: Daily performance statistics fields



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