

Infocast

Administration Guide



NEC

NEC America, Inc.

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1

Introduction

This *Infocast Administration Guide* provides the information needed to operate the Infocast Administration application. The topics in this chapter include:

- Chapter Topics*
- [What is Infocast?](#)
 - [How this Guide is Organized](#)
 - [Using this Guide](#)

What is Infocast?

Infocast is a productivity-based tool designed to allow NEC contact center users to view real-time queue statistics on the desktop. This enables users to react immediately to changes in call volume and agent availability to better serve customers.

Infocast gives users access to critical contact center statistics in a small window right on their workstations. While NEC's Virtual Wallboard application duplicates hardware wallboard statistics on the desktop, Infocast customizes this information for each user by displaying information that pertains to call activity for skill sets (splits) unique to that user.

Infocast displays call center information and statistics, such as:

- Abandoned percentage
- Calls in queue
- Grade of service
- Longest waiting call
- Number of agents in ready, break, work, and talk modes
- Split name
- Split number
- Total number of agents logged in

Using a local area network, Infocast links to an existing Global Navigator platform connected to a CallCenterWorX ACD to receive and display the

call center real-time queue statistics on each agent's personal computer running the Infocast client.



REFERENCE

Refer to the *NEC Infocast Installation Guide* for information on installing and configuring Infocast.

How this Guide is Organized

Chapter 1 Introduction

This chapter provides a brief overview of the Infocast application, along with how this guide is organized and the document conventions.

Chapter 2 Configuring Infocast

This chapter shows you how to perform the most common functions in the Infocast Administration application, including how to use the online Help.

Using this Guide

This guide is designed to make the Infocast Administration application easy to use. This guide contains examples of installation screens and step-by-step instructions for the procedures you need to perform.

Document Conventions

This guide uses the following document conventions listed in [Table 1-1](#):

Table 1-1 Document Conventions

When you see	It means	Example
Boldfaced	<ul style="list-style-type: none"> Field names Button names Drop-down list names Commands, keywords, or other user input 	Enter the ID in the Name field. Click Save . Select the names from the Employees drop-down list. Enter login admin at the command prompt.
Capitalized	<ul style="list-style-type: none"> Menu names Window names Dialog box names 	From the File menu, choose Save . From the Directory window, select Edit > Modify . Click OK to save and close the Account Properties dialog box.
Menu > Submenu (boldfaced font)	<ul style="list-style-type: none"> Menu paths 	Select Edit > Modify .

When you see	It means	Example
CTRL+S CTRL+Shift+S	• Shortcut keys	Press CTRL+S to save your changes.
F2	• Function keys	Press F1 to access the online Help.
Click Right-click	• Click the left mouse button • Click the right mouse button	Click OK to save your changes. Right-click and select Delete from the shortcut menu.

Procedures

Step-by-step instructions are numbered. Simply follow the numbered steps to perform the desired function.

Sometimes in step-by-step instructions, you will have more than one option to complete the task. These options are presented as shown in the following example:

- Step 1** Do one of the following to add a new employee to the Employee directory:
- Select the desired employee from the **Name** field and click **Add**.
 - Double-click the desired employee from the **Name** field.
 - To select all of the available names, click **Add all**.

Keyboard Conventions

The keys that may be used for this application are:

Table 1-2 Keyboard Conventions

Key	Action
Arrow keys	Scrolls among options within a menu or field.
Backspace	Erases the character to the left of the cursor.
Enter	Accepts a selection or field entry.
ESC	Exits the current screen or action and moves to the previous screen or action.
Tab	Moves forward through fields and options.
Shift+Tab	Moves backward through fields and options.
CTRL+Tab	Moves forward through tabs.
CTRL+Shift+Tab	Moves backward through tabs.



2

Configuring Infocast

The Infocast Administration application operates on a personal computer. This chapter describes the Infocast Administration application's features and includes these topics:

- Chapter Topics*
- [Getting Started Using the Infocast Administration Application](#)
 - [Configuring the Server](#)
 - [Selecting Users](#)
 - [Configuring Resource Users](#)

Getting Started Using the Infocast Administration Application

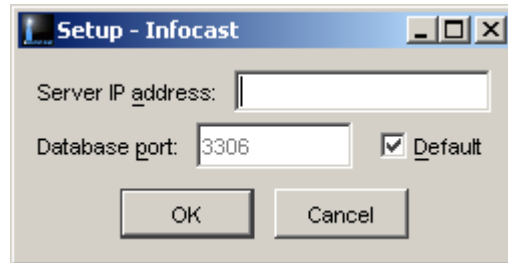
This section details the Infocast Administration window, and contains the procedures used to:

- Set up the Infocast Administration Connection
- Start and exit the Infocast Administration application
- Access online Help

Setting up the Infocast Administration Connection

Before running the Infocast Administration for the first time, you must configure the connection to the server. Use the following steps to configure the Infocast Administration application's server connection.

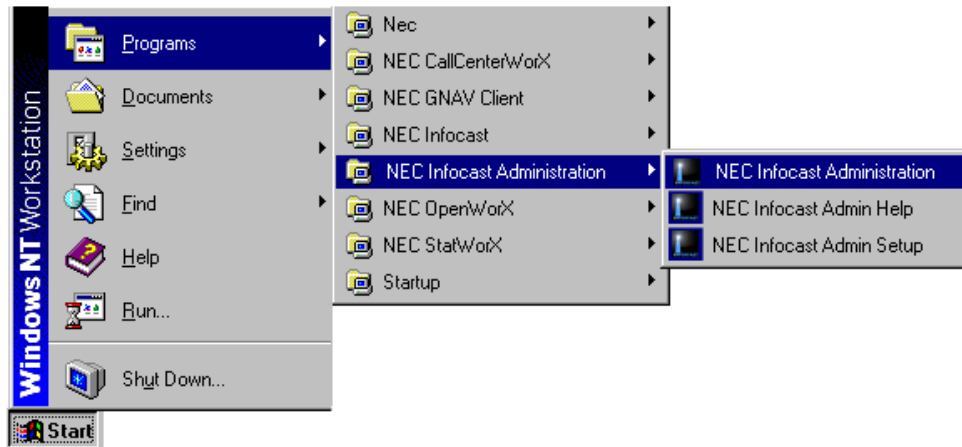
- Step 1** From the Windows Start menu, select **Programs > NEC Infocast Administration > NEC Infocast Administration Setup**. The Infocast Setup dialog box displays ([Figure 2-1](#)).

Figure 2-1 IP Setup - Infocast dialog


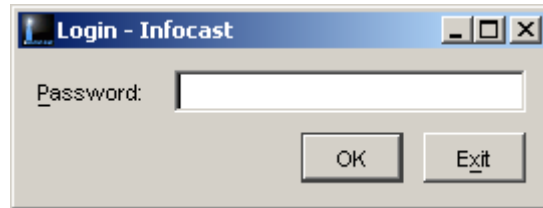
- Step 2** Enter the **Server IP address** and **Database port** of the Infocast Server (Global Navigator Server).
- Step 3** Select **Default** to use the default port assignment. To use a different port assignment, uncheck **Default** and enter the port number to assign.
- Step 4** Click **OK** to save the settings and close the dialog box.

Starting Infocast Administration

Use the following steps to start the Infocast Administration application.

Figure 2-2 Starting Infocast Administration


- Step 1** From the Windows desktop, select **Start > Programs > NEC Infocast Administration > NEC Infocast Administration** (Figure 2-2). The Infocast Login dialog box displays (Figure 2-3).

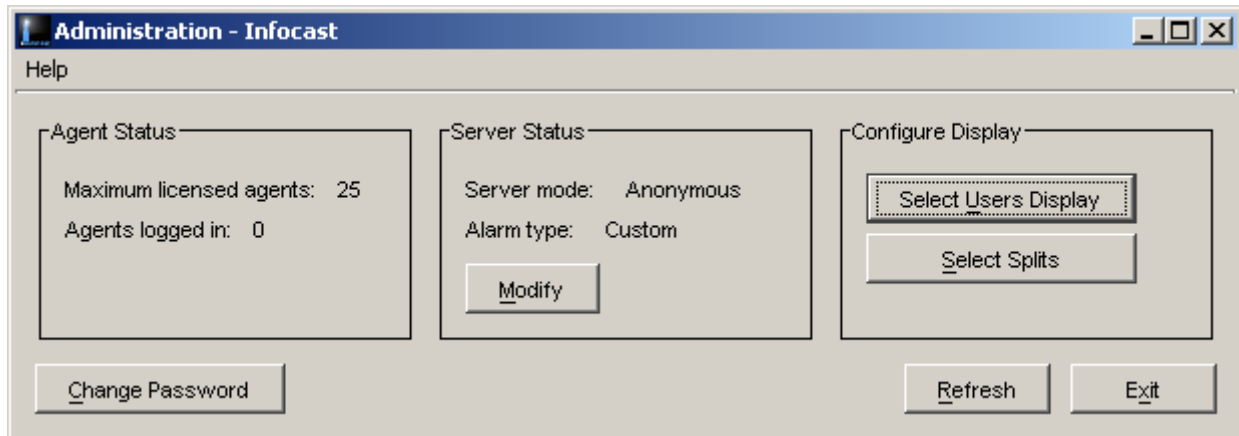
Figure 2-3 Infocast Login dialog


Step 2 Enter your password and click **OK**. The Infocast Administration window displays (Figure 2-4).



NOTE

The default password is **password**. You should change this default password immediately after logging in to Infocast Administration the first time. See “Changing the Infocast Administration Password” on page 3.

Figure 2-4 Infocast Administration window


Changing the Infocast Administration Password

You should change the default Administration password immediately after logging in to Infocast Administration the first time. Use the following steps to change the Administration password

Step 1 From the Administration - Infocast window, click **Change Password**. The Change Password dialog box displays (Figure 2-5).

Figure 2-5 *Change Password dialog*

- Step 2** Enter the current password in the **Old Password:** field.
- Step 3** Enter the new password in the **New Password:** field.
- Step 4** Enter the new password again in the **Confirm Password:** field.
- Step 5** Click **OK** to save the new password.

About the Infocast Administration Window

The Infocast Administration window ([Figure 2-4](#)) contains the following components:

- Title Bar** The Title Bar displays the name of the application.
- Menu Bar** The Menu Bar contains the available menus. [Table 2-1](#) describes the commands contained in the menu.

Table 2-1 *Infocast Administration Menus*

Menu	Action
Help	<ul style="list-style-type: none"> • Access the online Help. • View information about the Infocast Administration version installed.

Accessing Online Help

Online Help is available for Infocast Administration. The online Help contains a Contents listing, an Index, and a Search feature. Use these features to navigate to the desired Help topic.

Use the following step to launch the Infocast online Help.

- Step** Select **Help > Index**.

Exiting Infocast Administration

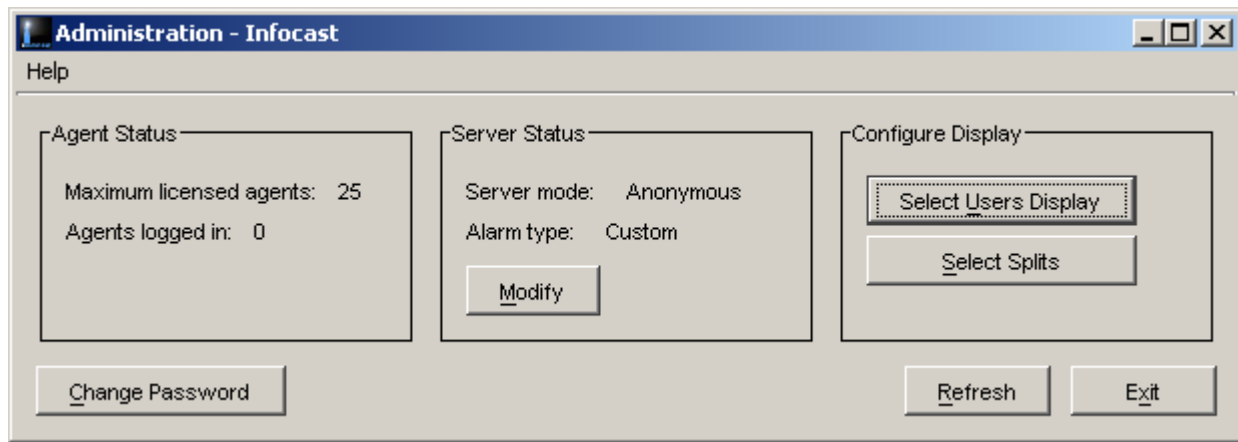
Use the following step to disconnect from the server, exit the Infocast Administration application, and return to the Windows desktop.

- Step** Do one of the following.
- Click the **Exit** button.
 - Press **ALT+F4**.
 - Press **ALT+x**.

Configuring the Server

You can use Infocast's Administration window (Figure 2-6) to view licensing information and the number of agents logged in, and to specify a server operating mode and alarm type. You can also configure how agent and split data display in the Infocast window, as well as specify alarm level values.

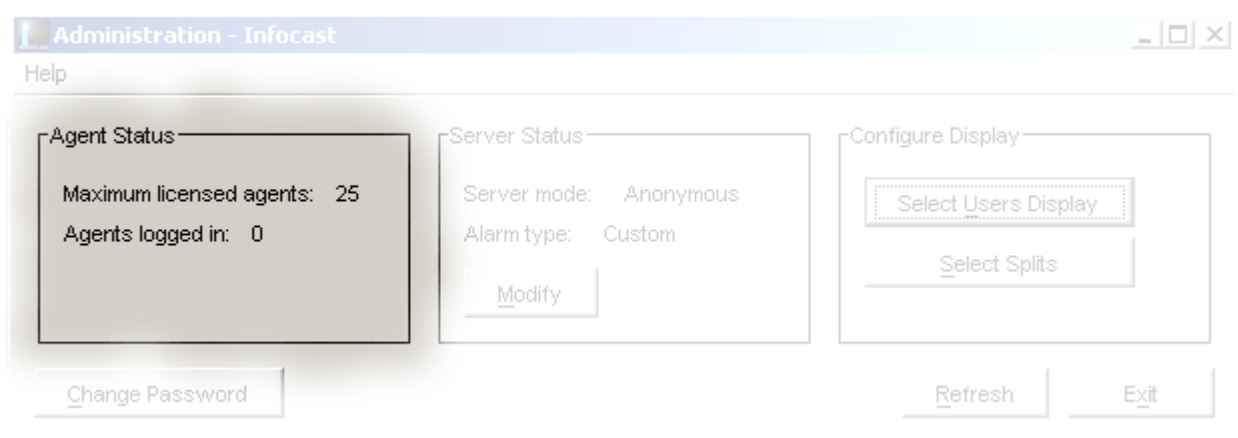
Figure 2-6 *The Administration - Infocast window*



Viewing the Licensing Information

The Agent Status box displays the maximum number of Infocast Client licenses and the number of agents currently connected (Figure 2-7).

Figure 2-7 *Administration - Infocast window - Agent Status*



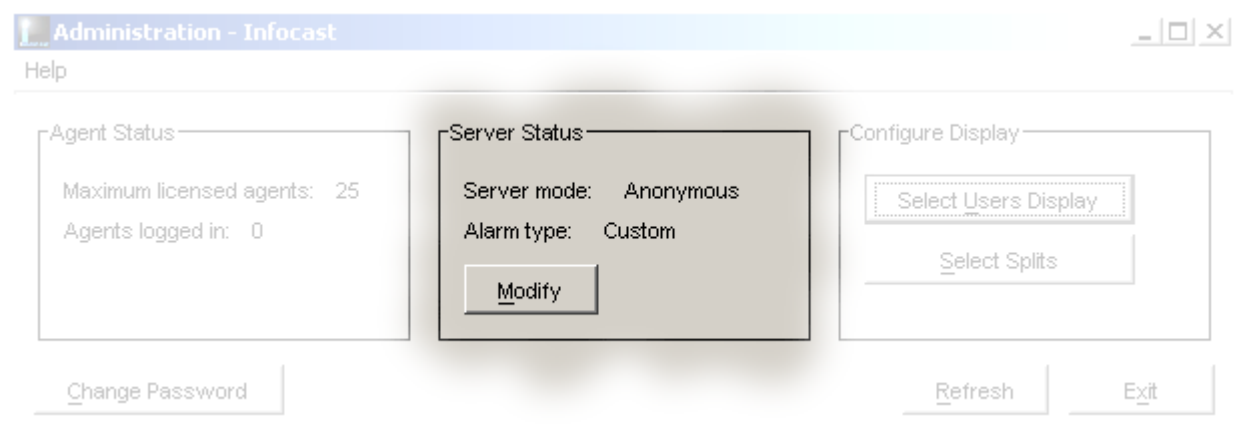
To view the licensing information, do the following:

- Step 1** Launch the Infocast Administration client. The Infocast Login dialog box displays (Figure 2-3).
- Step 2** Enter your password and click **OK**. The Infocast Administration window displays (Figure 2-6).
- Step 3** Click **Refresh** to update the displayed information, as needed.

Modifying the Server Settings

The Server Status box (Figure 2-8) lets you select a server mode, and specify whether the levels needed to trigger Infocast alarms are the same as those set by Global Navigator MIS or custom levels of your choosing.

Figure 2-8 Administration - Infocast window - Server Status



About Server Modes

You can configure Infocast to operate in either of the following modes:

- Anonymous mode* The Anonymous operating mode allows agents to start Infocast and receive statistics without entering an Agent ID and password. If Infocast is using Anonymous mode, the Infocast window displays immediately after launching the Infocast Client application from the desktop.
- Secure mode* The Secure operating mode requires an agent to log in before receiving and displaying statistics. When this mode is selected, Infocast prompts the agent to enter their ID and password to access the Infocast window.



Anonymous mode, which is also known as No Agent ID mode, is the default operating mode.

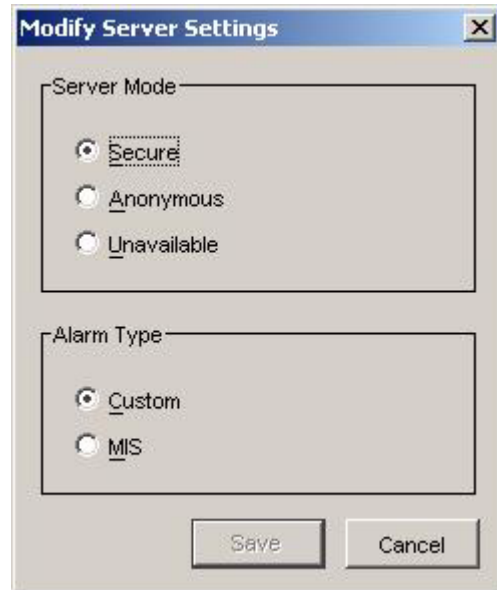
NOTE

Setting the Server Mode and Alarm Type

To modify the server settings do the following:

- Step 1** From the Server Status box (Figure 2-8) in the Administration window, click the **Modify** button. The Modify Server Settings dialog (Figure 2-9) displays.

Figure 2-9 *Modify Server Settings dialog*



- Step 2** Click a radio button to select a Server Mode:
- To require agents to log in before receiving and displaying statistics, select **Secure Mode**.
 - To allow agents to start Infocast and receive statistics without entering an Agent ID and password, select **Anonymous Mode**.
 - To disable logins to the Infocast Server, select **Unavailable**.
- Step 3** Click a radio button to select an Alarm Type:
- To instruct the server to use alarms which can be configured with custom level values you determine, select **Custom**.
 - To instruct the server to use level values obtained from Global Navigator MIS settings, select **MIS**.
- Step 4** Click **Save** to save your changes.

Configuring Custom Alarm Levels

The Custom Alarms dialog (Figure 2-12) contains the configuration settings for the custom alarm levels Infocast uses.



NOTE

If you chose to use Global Navigator MIS alarms in the Modify Server Settings dialog (Figure 2-9), you must instead use Global Navigator to configure alarm levels.

To configure the custom alarm level threshold values, do the following:

- Step 1** Be sure you have assigned the custom Alarm Type in the Modify Server Settings dialog (Figure 2-9).
- Step 2** From the Administration - Infocast window, click **Select Splits**. The Select Splits dialog displays (Figure 2-10 if only a single node is available, Figure 2-11 if multiple nodes are available).

Figure 2-10 Select Splits dialog (single node available)

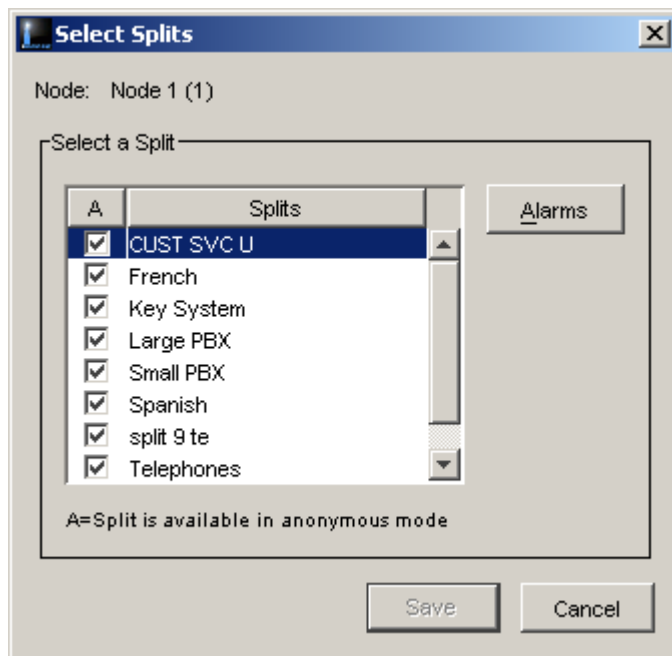
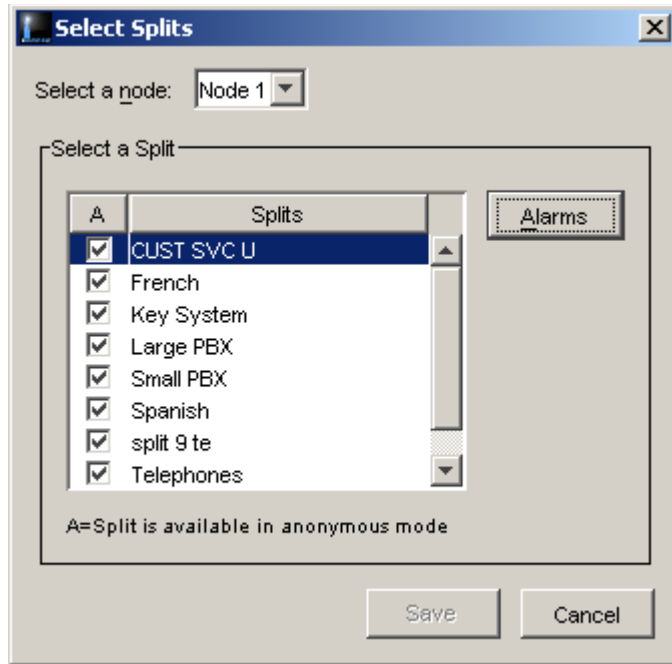


Figure 2-11 Select Splits dialog (multiple nodes available)



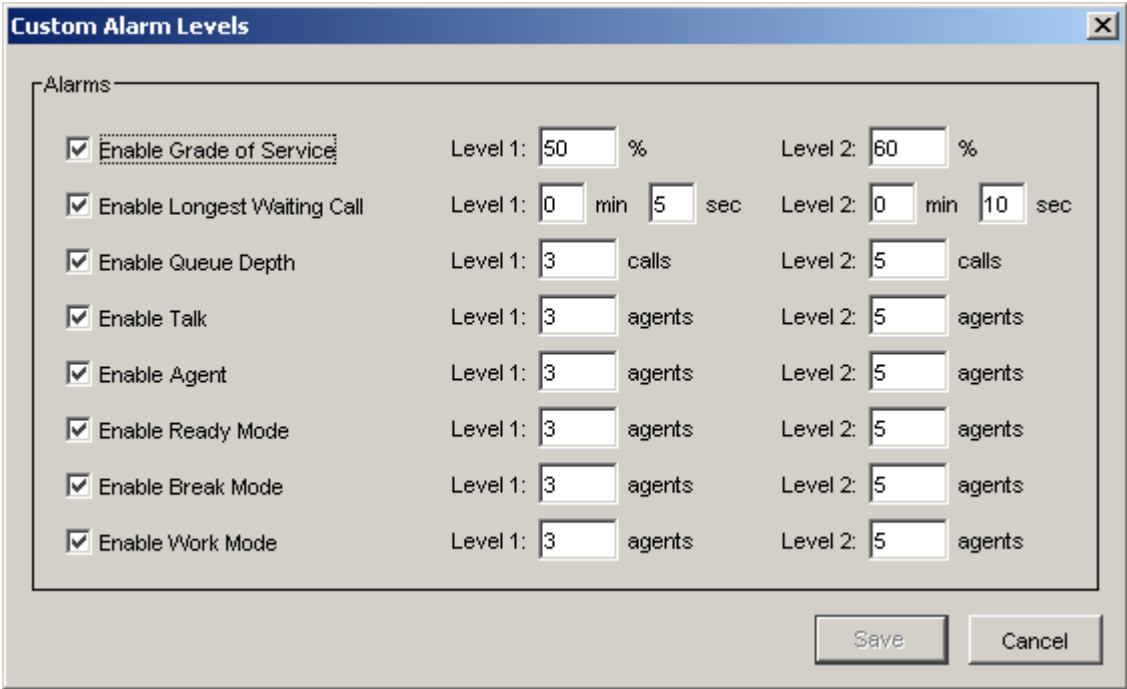
- Step 3** If your system contains multiple nodes, click the **Select a node:** dropdown menu and select the desired node. The **Select a Split** box lists the splits available in the selected node.
- Step 4** Select the split from the **Select a Split** box whose alarm levels you want to view or modify.
- Step 5** Click the **Alarms** button. The Custom Alarm Levels dialog displays (Figure 2-12).



NOTE

The Alarms button does not display unless you selected the Custom Alarm type in the Modify Server Settings dialog.

Figure 2-12 Custom Alarm Levels dialog



- Step 6** Click a checkbox to enable each alarm, as needed.
- Step 7** Enter a custom value for each Level 1 and Level 2 alarm, as needed.
- Step 8** Click **Save** to save the custom alarm values.



For more information about configuring Level 1 and Level 2 alarms, please refer to the Global Navigator Online Help.

Selecting Users

You can select a list of users whose data will appear in the Infocast Client window, and select which of the available data columns display. Then, you can select splits for each user from a list of available splits.

Use the following steps to specify which data columns Infocast will display for a specific user, and to select the user's available and configured splits.

- Step 1** From the Administration - Infocast window (Figure 2-6), click **Select Users**. The Select Users Display dialog displays (Figure 2-13 if only a single node is available, Figure 2-14 if multiple nodes are available).

Figure 2-13 Select Users Display dialog (single node available)

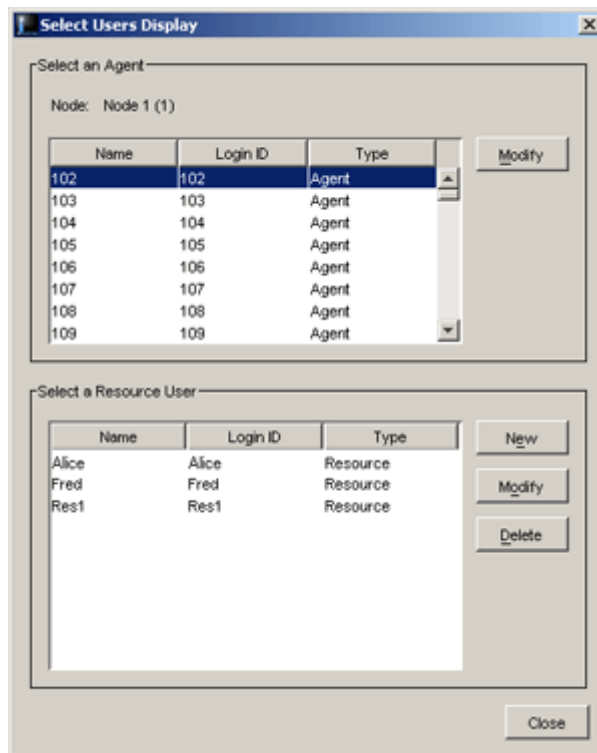
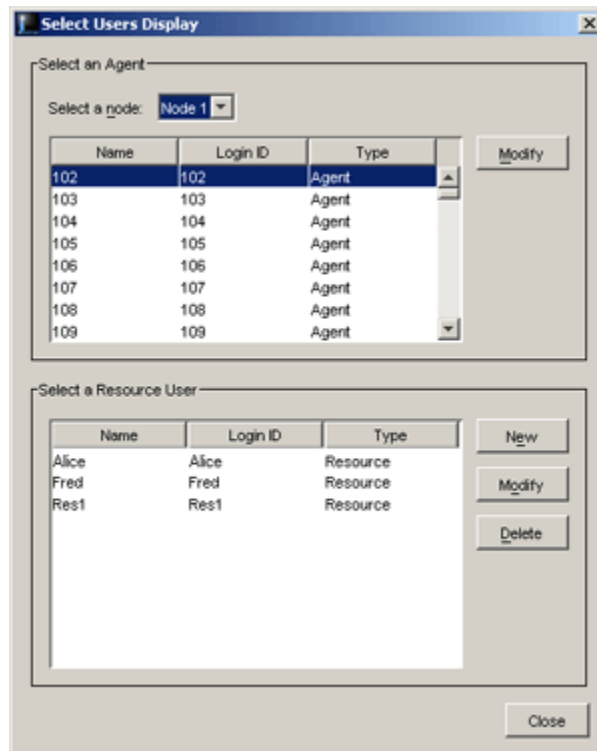
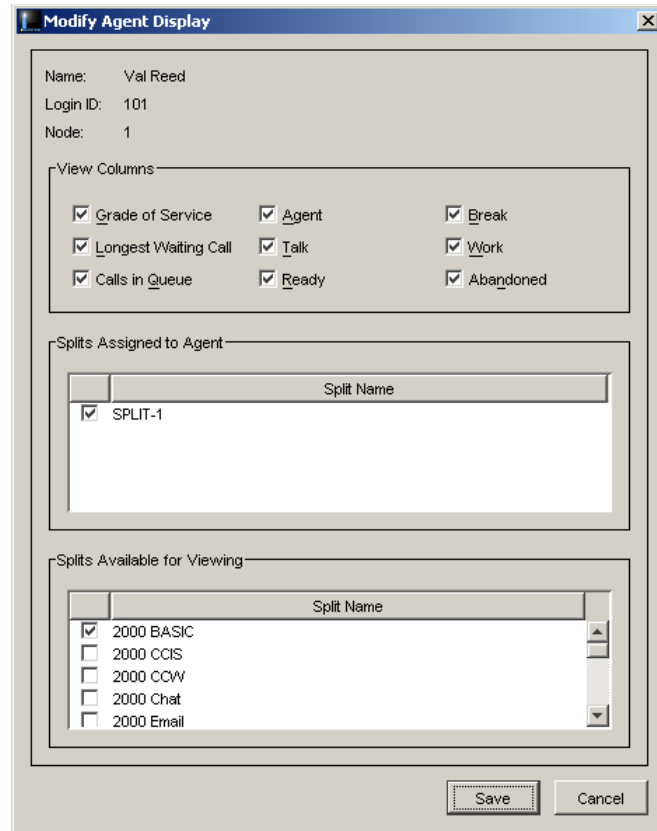


Figure 2-14 Select Users Display dialog (multiple nodes available)



- Step 2** If your system contains multiple nodes, click the **Select a node:** dropdown menu and select the desired node. The **Select an Agent** box lists the agents available in the selected node.
- Step 3** Select the agent from the **Select an Agent** box, then click **Modify**. The Modify Agent Display dialog displays (Figure 2-15).

Figure 2-15 *Modify Agent Display dialog*

- Step 4** Click checkboxes in the **View Columns** box to specify each data column Infocast will display for the selected user.
- Step 5** Do one of the following:
- To add a split to a user, click a checkbox in the **Splits Assigned to Agent** box to select the desired split.
 - To remove a split from a user, click its checkbox in the **Splits Available for Viewing** box to de-select it.
- Step 6** The **Splits Available for Viewing** list contains the Split Parameters that Infocast can display to the agent. Select the check box next to the desired parameter to enable or disable the parameter for the agent.
- Step 7** Click **Save** to save your changes.

Configuring Resource Users

Resource Users exist only in Infocast; they do not have to be configured from within Global Navigator. Creating a Resource User is a good way to allow supervisors, administrators, and others with similar duties to view ACD statistics without creating an agent account.

Infocast Administration lets you add, modify, or delete Resource Users, as well as set passwords and assign splits to them.

Adding a New Resource User

To add a New Resource User, do the following:

- Step 1** From the Administration - Infocast window (Figure 2-6), click **Select Users**. The Select Users Display dialog displays (Figure 2-13 if only a single node is available, Figure 2-14 if multiple nodes are available).
- Step 2** In the **Select a Resource User** box, click **New**. The New Resource User dialog displays (Figure 2-16 if only a single node is available, Figure 2-17 if multiple nodes are available).

Figure 2-16 New Resource User dialog (single node available)

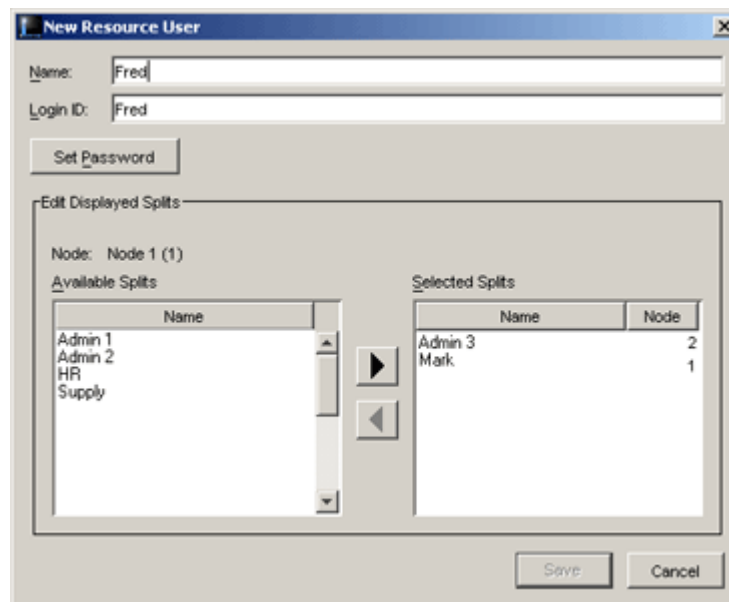
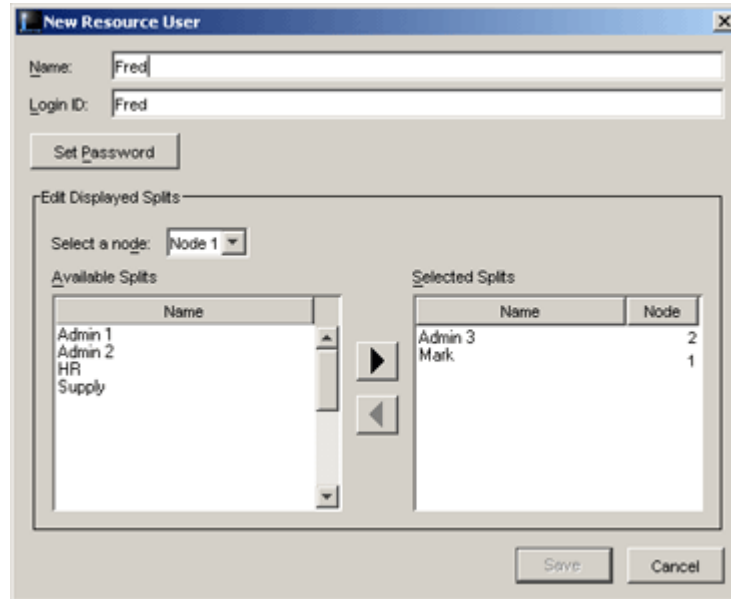
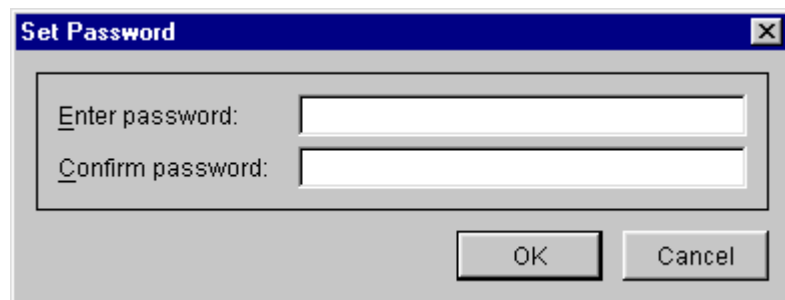


Figure 2-17 *New Resource User dialog (multiple nodes available)*

- Step 3** Enter the new user's name in the **Name:** field.
- Step 4** Enter an ID in the **Login ID:** field.
- Step 5** Click **Set Password**. The Set Password dialog displays (Figure 2-18).

Figure 2-18 *Set Password dialog*

- Step 6** Enter the user's new password in the appropriate fields, then click **OK**.
- Step 7** If your system contains multiple nodes, click the **Select a node:** dropdown menu and select the desired node. The **Available Splits** box lists the splits available in the selected node.
- Step 8** To add a split to this user, select the desired split from the **Available Splits** list.
- Step 9** Click **▶** to move the splits to the **Selected Splits** list. (Use **◀** to remove splits from the **Selected Splits** list.)
- Step 10** Click **Save** to save your changes.

Modifying a Resource User

To modify a Resource User, do the following:

- Step 1** From the Administration - Infocast window (Figure 2-6), click **Select Users**. The Select Users Display dialog displays (Figure 2-13 if only a single node is available, Figure 2-14 if multiple nodes are available).
- Step 2** In the **Select a Resource User** box, select the resource users name and click **Modify**. The Modify Resource User dialog displays (Figure 2-19 if only a single node is available, Figure 2-20 if multiple nodes are available).

Figure 2-19 Modify Resource User dialog (single node available)

The screenshot shows the 'Modify Resource User' dialog box. At the top, there are two text input fields: 'Name' containing 'Admin 1' and 'Login ID' containing 'Admin 1'. Below these is a 'Set Password' button. The main section is titled 'Edit Displayed Splits' and contains the following information:

Node: Node 1 (1)

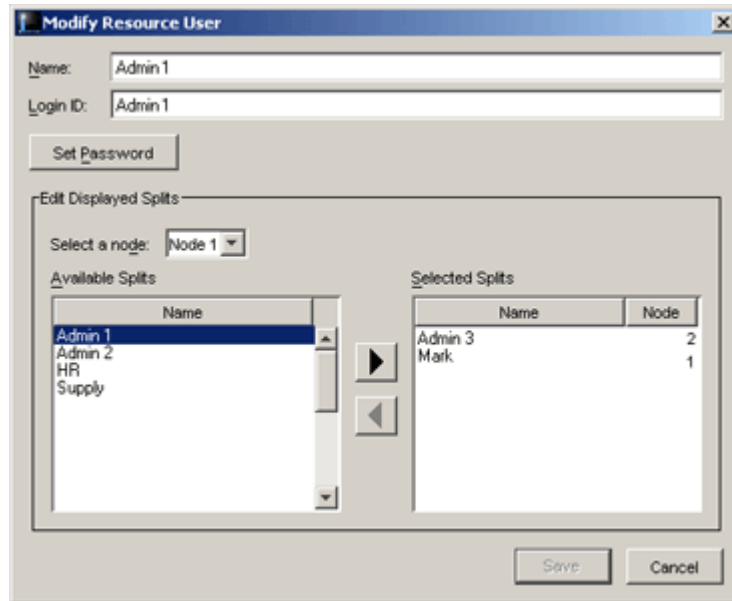
Available Splits

Name
Admin 1
Admin 2
HR
Supply

Selected Splits

Name	Node
Admin 3	2
Mark	1

At the bottom of the dialog are 'Save' and 'Cancel' buttons.

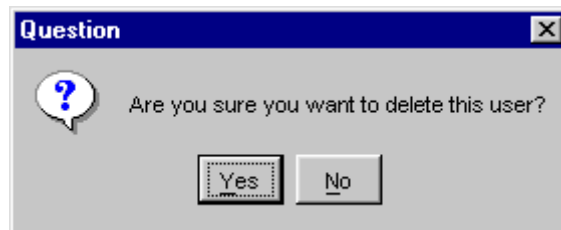
Figure 2-20 *Modify Resource User dialog (multiple nodes available)*

- Step 3** Make any necessary changes to the name, Login ID, password, or splits for the selected user (If your system contains multiple nodes, click the **Select a node:** dropdown menu and select the desired node) then click **Save** to save the changes.

Deleting a Resource User

To delete a Resource User, do the following:

- Step 1** From the Administration - Infocast window (Figure 2-6), click **Select Users**. The Select Users Display dialog displays (Figure 2-13 if only a single node is available, Figure 2-14 if multiple nodes are available).
- Step 2** In the **Select a Resource User** box, select the resource users name and click **Delete**. A delete confirmation dialog displays (Figure 2-21).

Figure 2-21 *Delete Confirmation dialog*

- Step 3** Click **Yes** to delete the user.

***For additional information or support on this NEC product,
contact your NEC representative.***

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