



Lucent Call Center's
Little
Instruction
Book

for basic administration

Notice

Every effort was made to ensure that the information in this book was complete and accurate at the time of printing. However, information is subject to change.

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Acknowledgment

This document was prepared by Global Learning Solutions, Lucent Technologies, Denver, CO USA.

Use this area to record frequently referred to pages in this book and to keep personalized notes for quick and easy access.

This image shows a single sheet of white paper with horizontal ruling lines. The lines are evenly spaced and run across the width of the page. There are no margins, text, or other markings on the paper.

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Welcome

Why this new book?

This book contains the information you need for basic call center administration using the *DEFINITY* Enterprise Communication Server (ECS), *CentreVu* Call Management System (CMS) and *CentreVu* Supervisor. Some steps may vary between the different versions of *DEFINITY* systems, *CentreVu* CMS, and *CentreVu* Supervisor, but the instructions provided will help you through the basic operations.

We wrote this book for you!

Use this book if you are a call center system administrator or split/skill supervisor. Use it before you attend training, and take it with you to your class. Mark it up, make notes in it, and use it daily even after you complete training. If you are a new supervisor or administrator taking over the position from someone else, or you are a system administrator temporarily filling in for your company's regular administrator, or if you just want to refresh your memory about basic call center operations, then this book is for you.

What this book contains

The *CentreVu Call Center Little Instruction Book for basic administration* is divided into sections and arranged to guide you through your day-to-day operations. The following table outlines the sections of the book and their contents.

Getting started	Provides an overview of a call center. It is designed to familiarize you with the <i>CentreVu</i> CMS using the <i>CentreVu</i> Supervisor interface and to provide basic instructions for accessing your system, assigning a <i>CentreVu</i> CMS User ID, and setting user access permissions. We recommend that you also refer to the <i>DEFINITY System's Little Instruction Book for advanced administration</i> for more information on call centers.
Managing features	Provides instructions on assigning Dictionary names to call center entities and automating features using Exceptions, <i>CentreVu</i> CMS Timetables, and <i>CentreVu</i> Supervisor Scripts.
Service observing	Describes the forms and fields used to administer the service observing capability and instructions and tips on the various methods of service observing available.
Managing backups	Describes the types of backups that are available and recommendations on when to run them. Also provides directions on how to run them.
Keeping records	Lists records that are vital to the system administrator. Also provides logs with recommendations for managing and organizing records to provide optimum system operations.

Conventions and terms used in this book

The following terms and conventions will help you to use this book in your call center.

- In this book we use the terms “switch” and “split/skill”. Other Lucent Technologies books may refer to the switch as the “PBX”, and a split/skill as a “hunt group”.
- Operational function keys, fields, and text boxes are printed in italics, for example, *Enter*.
- We show screens from the newest *CentreVu* systems and refer to the most current books. Please substitute the appropriate commands for your system and refer to the manuals you have available.
- You may see the following symbols in this book:



Tip:

Draws attention to information that you may find helpful in completing the procedures related to the Tip.



NOTE:

Draws attention to information that is included in the paragraph.



CAUTION:

Calls attentions to a situation that could result in harm to the software, loss of data, or a possible service interruption.

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Related books

The following documents include information related to the Lucent Call Center Release 8.



NOTE:

The Lucent Call Center Release 8 Documentation CD-ROM (585-210-926) includes the on-line version of most of the documents listed in this section.

The *DEFINITY System's Little Instruction Book* series is a good resource for information on basic administration, advanced administration, and basic diagnostics on the *DEFINITY ECS*.

CentreVu CMS and CentreVu Supervisor books

- *CentreVu* Call Center Little Instruction Book for basic administration, 585-210-935, Issue 1, Comcode 108502253
- *CentreVu* Call Center Little Instruction Book for advanced administration, 585-210-936, Issue 1, Comcode 108502261
- *CentreVu* Call Management System Release 3 Version 8 Administration, 585-210-910, Issue 1, Comcode 108501743
- *CentreVu* Call Management System Database Items, 585-210-939, Issue 1, Comcode 108502345
- *CentreVu* Call Management System Release 3 Version 8 External Call History Interface, 585-210-912, Issue 1, Comcode 108501784
- *CentreVu* Call Management System Release 3 Version 8 Upgrades and Migrations, 585-210-913, Issue 1, Comcode 108501834
- *CentreVu* Call Management System Release 3 Version 8 Software Installation and Setup, 585-210-941, Issue 1, Comcode 108502360

- *CentreVu* Call Management System Release 3 Version 8 Maintenance and Troubleshooting, 585-210-919, Issue 1, Comcode 108501917
- *CentreVu* Call Management System Switch Connections and Administration, 585-25-876, Issue 2, Comcode 10850958
- *CentreVu* Advocate Release 8 User Guide, 585-210-927, Issue 1, 108502162
- *CentreVu* Supervisor Version 8 Installation and Getting Started, 585-210-928, Issue 1, 108502170
- *CentreVu* Supervisor Version 8 Reports, 585-210-929, Issue 1, Comcode 108502188
- *CentreVu* Report Designer Version 8 User Guide, 585-210-930, Issue 1, Comcode 108502196
- *CentreVu* Call Management System Forecast, 585-215-825, Issue 1, Comcode 107876203
- *CentreVu* Call Management System Custom Reports, 585-215-822, Issue 2, Comcode 108501867

CentreVu Visual Vectors books

- *CentreVu* Visual Vectors Version 8 User Guide, 585-210-932, Issue 1, Comcode 108502220
- *CentreVu* Visual Vectors Version 8 Installation and Getting Started, 585-210-933, Issue 1, Comcode 108502238

CentreVu Explorer books

- *CentreVu Explorer II User Guide*, 585-218-200, Issue 1, Comcode 108456617
- *CentreVu Explorer II Installation for Windows NT*, 585-218-201, Issue 1, Comcode 108456625

DEFINITY ECS call center books

These documents are issued for *DEFINITY* ECS Call Center applications.
The intended audience is *DEFINITY* ECS administrators.

- *DEFINITY Enterprise Communications Server Release 8 Call Vectoring/EAS Guide*, 585-230-521, Issue 4, Comcode 108596545
- *DEFINITY Enterprise Communications Server Release 8 Guide to ACD Call Centers*, 555-233-503, Issue 2, Comcode 108596354
- *DEFINITY Enterprise Communications Server Basic Call Management System (BCMS) Operations*, 555-230-706, Issue 2, Comcode 108485087

Welcome

Tell us what you think!

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Tell us what you think!

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You can use the Reply Card at the beginning of the book as a guide to what type of information will be helpful to us to improve this book.

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How to get this book on the world wide web

If you have Internet access, then you can view and download the latest version of *Call Center Little Instruction Book for basic administration*. You must have a copy of *Acrobat Reader* to view the book.

To access the latest version of this book, complete these steps:

1. Access the Customer Self-Service Center web site at <http://support.lucent.com/>
2. Select **Information Resources**.
3. Select **ELMO**.
4. Enter **your IL** (Location ID) to access the library.
5. Enter **585-210-935** (the document number) to view the latest version of the book.

Welcome

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 Comcode 108502253, Issue 1, December 1999



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How to get help

If you need additional help, the following services are available. You may need to purchase an extended service agreement to use some of these services. See your Lucent Technologies representative for more information.

CentreVu CMS Helpline	1-800-242-2121
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...for help with feature administration, system applications, and reports

DEFINITY Helpline	1-800-225-7585
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...for help with feature administration and system applications

Lucent Technologies National Customer Care Center Support Line	1-800-242-2121
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...for help with maintenance and repair

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Welcome

Before you contact Lucent Technologies for support

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Before you contact Lucent Technologies for support



Tip:

You can visit our web site at <http://support.lucent.com/> to check status on service maintenance requests by individual case or location, order replacement of defective or damaged equipment on-line and download available software.

If after checking the status of your maintenance request at the website you need to call Lucent for additional support, have the following information ready. This will help the person you contact to locate your account quickly and be on the road to finding solutions to the reason you called.

- Your installation location ID (commonly referred to as your IL) or main listed telephone number

(Write your IL and main telephone number here for easy reference)

- A call-back number (in case we need to call you later)
- The reason for your call, including any background details or history that may have contributed to your call for additional support (for example, vector changes, hardware changes, modifications to system configurations, specific reports, dates and times, and so on.)
- For *BCMS Vu* calls, be sure *PC Anywhere* is installed on the PC you're calling about and that a modem is connected to it.

Once you gather the information you need, refer to "How to get help" for a list of Lucent support organizations and their telephone numbers.

Getting started

This section contains an overview of a call center. It provides basic instructions for the following tasks:

- Accessing and exiting *CentreVu* Call Management System (CMS) using the *CentreVu* Supervisor and *CentreVu* Terminal Emulator interfaces
- *CentreVu* Supervisor and *CentreVu* Terminal Emulator functions
- Assigning a *CentreVu* CMS user ID
- Setting user access permissions using *CentreVu* Supervisor
- Setting and resetting passwords for users.



NOTE:

We also recommend that you refer to the *DEFINITY Little Instruction Book for advanced administration* for a call center overview. It shows how to set up a simple inbound call center and lists things to consider as you plan and design your call center.

Refer to the *DEFINITY Little Instruction Book for basic administration* for direction on adding new *DEFINITY* logins, changing your *DEFINITY* password, and logging on and off of the *DEFINITY* system.

Overview of a call center

A call center is a way of organizing people (agents) and equipment (telecommunications and computer) to achieve particular business goals. For example, a call center can be used to make several people accessible through one telephone number or to handle multiple calls simultaneously. Call centers work by organizing agents into splits/skills and routing calls using the *DEFINITY* ECS Automatic Call Distribution (ACD) capabilities.

Call center reporting tools

When you set up a call center using Lucent products, you can select your reporting tools from the following set of call management systems. The reporting tool that you select will depend on the complexity and size of your call center. The reporting tools available for your use include:

- *CentreVu* Call Management System (CMS) and the *CentreVu* Supervisor application, which is a *Windows* interface for the CMS.
- *CentreVu* CMS and the *CentreVu* Terminal Emulator, which gives access to the ASCII interface for the CMS.
- Basic Call Management System (BCMS) accessed directly on the *DEFINITY* ECS.
- BCMS and the *BCMS Vu* application, which is a *Windows* interface for the BCMS reporting capabilities.
- VuStats.

This book provides instructions for call center administration on the *DEFINITY* ECS and through the *CentreVu* CMS (using either the *CentreVu* Supervisor application or the *CentreVu* Terminal Emulator).

For more detailed information on using the *CentreVu* CMS, refer to the *CentreVu*® *Call Management System Release 3 Version 8 Administration* (585-210-910) and the *CentreVu*® *Supervisor Reports* (585-210-929) books.

For more detailed information on using the BCMS, refer to the *DEFINITY[®] Enterprise Communications Server BCMS Operations* (555-230-706) book. For more information on using the BCMS Vu application, refer to the *BCMS Vu User Guide* (585-217-102).

Administering the call center

You can administer different aspects of the call center from the *DEFINITY* or from the *CentreVu* CMS. This book focuses on the *CentreVu* CMS interfaces (*CentreVu* Supervisor and *CentreVu* Terminal Emulator) because they enable you to administer changes on both the *CentreVu* CMS and the *DEFINITY* ECS, and they provide access to reports on ACD activity.

Accessing the CentreVu CMS

You need to log in to the *CentreVu* CMS before you can administer your call center. To log in, you need to know your login ID (user ID) and your *CentreVu* CMS password.

Logging in to CentreVu CMS

CentreVu CMS can be accessed using either the *CentreVu* Supervisor or the *CentreVu* Terminal Emulator interface. This section gives instructions on logging in from each interface.

Using CentreVu Supervisor

To log in to the *CentreVu* CMS server using the *CentreVu* Supervisor, follow these steps:

1. Open the *CentreVu* Supervisor application.
2. Select *Login* from the Connect menu or select the *Login* button on the toolbar.

The Login Information window opens.

3. From the drop-down list, select the *CMS Server* to which you want to log in.
4. Type your *CentreVu* CMS **login ID** in the *Login ID* text box, or select your login ID from the drop-down list.
5. Use the tab key to move the cursor to the *Password* text box.
6. Type your *CentreVu* CMS **password** in the *Password* text box.

You may see the Confirm Password window. This window reports that your password has expired and must be changed. Follow the prompts and type in a new password.

7. Select *OK*.

A message box indicates that *CentreVu* Supervisor is connecting to the CMS server.

When a user with an Administrative ID logs in, they may see one of the following warning messages displayed:

WARNING - there is no record of a cmsadm backup being performed on this machine. Please perform a backup as soon as possible so that we will have a record of your backup from this point.

WARNING - there is no record of a full maintenance backup being performed on this machine. Please perform a backup as soon as possible so that we will have a record of your backup from this point.

If this occurs, refer to the “Managing Backups” section of this book.

Once you are logged in to the *CentreVu* CMS via the *CentreVu* Supervisor interface, the *CentreVu* Supervisor Controller (main window) displays.

Using *CentreVu* Terminal Emulator

To log in to the *CentreVu* CMS server using the *CentreVu* Terminal Emulator, follow these steps:

1. Open the *CentreVu* Terminal Emulator application.
2. Select *Open* from the Profile menu.
3. Select the *Profile* name of the server to which you want to connect.
4. Select the *Connect* button to display a login prompt.
5. Type your *CentreVu* CMS **login ID** and press *Enter*.
6. Type your **password** and press *Enter*.
7. Type the **terminal type** (**cvterm** is recommended) and press *Enter*.

Once you are logged in, the *CentreVu* CMS MainMenu is displayed.

Logging out of *CentreVu* CMS

The following sections give you instructions on logging out of the *CentreVu* CMS.

Using *CentreVu* Supervisor

Use either of the following methods to log out of the *CentreVu* CMS server, but leave the *CentreVu* Supervisor application running:

- Select *Logout* from the Connect menu, or
- Select the *Logout* button or the *Exit* button on the toolbar.

Use either of the following methods to log out of *CentreVu* CMS and exit *CentreVu* Supervisor:

- Select *Exit* from the Connect menu, or
- Select the **X** in the upper-right corner of the *CentreVu* Supervisor Controller window.

Using *CentreVu* Terminal Emulator

Use the following method to log out of the *CentreVu* CMS server and leave the *CentreVu* Terminal Emulator application running:

1. Use the arrow keys to highlight *Logout* on the CMS MainMenu and press *Enter*.

A dialog box states “The connection has been dropped.”

2. Select *OK*.

Use either of the following methods to log out of the *CentreVu* CMS and exit the *CentreVu* Terminal Emulator:

1. Select *Exit* from the Profile menu

A dialogue box opens stating, "The connection is active, exit anyway?"

2. Select *Yes*.

Or...

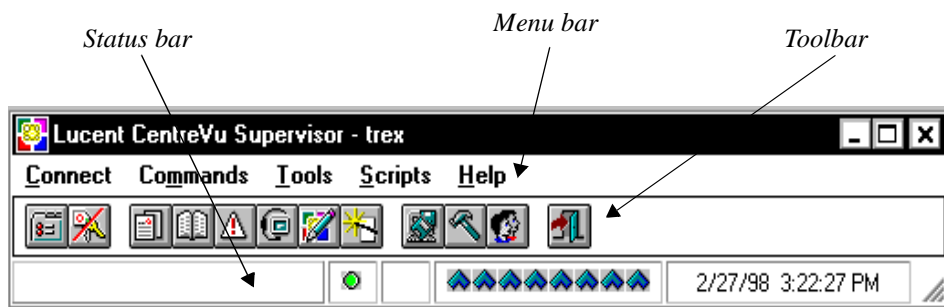
1. Click on the **X** in the upper-right corner of the *CentreVu* Terminal window.

A dialog box states "The connection is active, exit anyway?"

2. Select *Yes*.

CentreVu Supervisor when you are logged in to the CentreVu CMS

Once you have logged into a *CentreVu* CMS server, the *CentreVu* Supervisor Controller toolbar, status bar, and menu bar display the CMS systems to which you have access. Your *CentreVu* CMS User Permissions determine which of the menu items and toolbar buttons are available to you.



Toolbar

The toolbar contains buttons for quick access to specific features of the application. When you move your cursor over a toolbar button, a tooltip displays with a brief description of the command the button performs.

Status bar

The status bar is located at the bottom of the Controller window. It displays a brief description of each of the toolbar buttons when the cursor is over the button. The status bar also includes a Login Status indicator. The indicator is a green light if you are logged in to a *CentreVu* CMS server and is gray if you are not logged in.

Menu bar

The Menu bar lists the available drop-down menus. The Connect, Tools and Help menus are available before you log in to a *CentreVu* CMS server. Once you log in to a *CentreVu* CMS server, the Commands and Scripts menus are also available.



NOTE:

The *CentreVu® Call Management System Release 3 Version 8 Administration* (585-210-910) book provides more information about using the *CentreVu* Supervisor Controller features that are available when you log in to the *CentreVu* CMS server.



Tip:

You can press the F1 key from any window in *CentreVu* Supervisor for specific details on how to complete that window.

Getting started

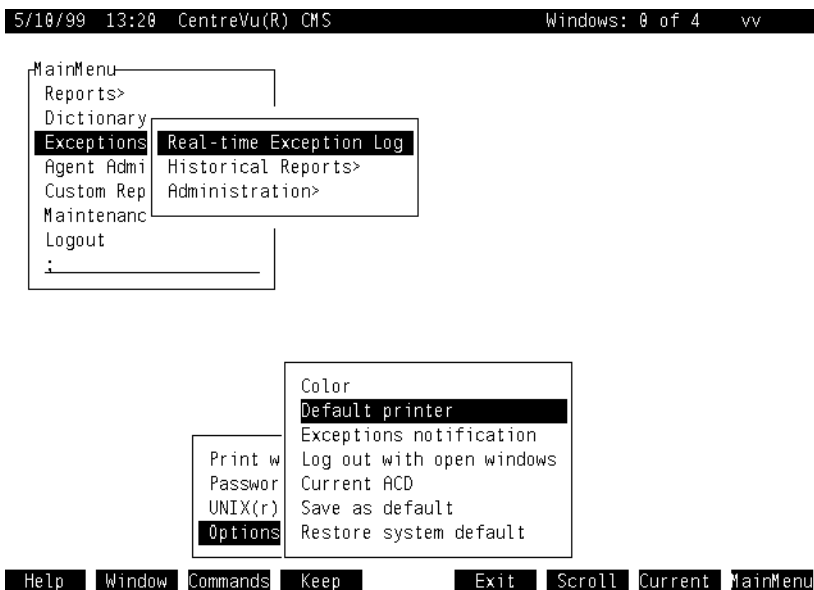
CentreVu Terminal Emulator when you are logged in to the CentreVu CMS

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CentreVu Terminal Emulator when you are logged in to the CentreVu CMS

Once you have logged into *CentreVu* CMS using the *CentreVu* Terminal Emulator interface, the ASCII version of the *CentreVu* CMS MainMenu displays. In general, you will only use this *CentreVu* CMS interface to administer Timetables and change passwords.

The *CentreVu* CMS MainMenu displays in ASCII format when you log in through *CentreVu* Terminal Emulator. The example below shows you how this window looks with some of the menus open.



Getting help in *CentreVu* Supervisor

The *Windows*-based on-line help for the *CentreVu* Supervisor interface is accessed by either:

- **Pressing the F1 key** for specific help (context sensitive) on the screen that is currently active.
- **Selecting the Help button** from the menu bar to choose from the following options.
 - *Contents*
Opens the Help Topics window, where you can select Contents, Index or Find.
 - *Technical Support*
Opens a window that provides Technical Support Information.
 - *About*
Opens a window that shows the version of *CentreVu* Supervisor software that is in use.

We suggest that you access the on-line help first whenever you need assistance. Using the on-line help, you may be able to resolve many of your questions without calling technical support.

Getting started

Getting help in CentreVu Terminal Emulator

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Getting help in *CentreVu* Terminal Emulator

The on-line help for the *CentreVu* Terminal Emulator is accessed by pressing F1 to access the Help Screen Labeled Key (SLK).

Assigning a *CentreVu* CMS user ID

A *CentreVu* CMS user ID (login ID) must be assigned to each person who needs access to the *CentreVu* CMS server. Once assigned, the user ID becomes the *CentreVu* CMS user's login ID, which the person will use to log in to the *CentreVu* CMS server via the *CentreVu* Supervisor interface. The user ID is used to assign user permissions to the ACD, Feature, Split/Skill, Trunk Group, Vector, and VDN subsystems for each CMS user.

To assign a new user ID or modify an existing user ID, complete the following steps:

1. Select *User Permissions* from the Tools menu.
2. On the User Permissions selector window, highlight *User Data* and select *OK*.

The User Data window displays.

User Permissions User Data

Actions Edit Help

+ [Icon] [Icon] [Icon] [Icon] [Icon] [Icon]

User ID:

User name:

Room number:

Telephone number:

Default printer name:

Login type (select only one) :

☒ Normal user

☐ Administrator

Maximum user window count (1-12):

Minimum refresh rate (seconds):

Login ACD:



Tip:

The User Data window, which is accessed from the *User Permissions* item on the Tools menu has some default values populated. You may want to clear the default values by pressing **CTRL+ Z** before doing a Find one or List all.

3. In the *User ID* text box, type a unique **user ID** to add or modify.

The user ID must be three to eight lowercase, alphanumeric characters with no blanks or special characters.

4. The *User name*, *Room number*, and *Telephone number* fields are optional.
5. In the *Default printer name* text box, use the drop-down menu to select the **name of the printer** that is connected to the CentreVu CMS server or none if the user will print to a printer that is connected to his/her PC or the LAN.



NOTE:

For the printer that is directly connected to the *CentreVu* CMS server to be accessible by users, it must be set up in *Solaris* and in CMS.

6. Select a *Login type*:

- *Normal* — users do not have access to System Setup, User Permissions, Call Center Administration, and Forecast.
- *Administrator* — users have access to all parts of *CentreVu* CMS.

7. In the *Maximum user window count* text box, type the maximum **number of windows** that this user can have open at one time.



Tip:

Since the number of windows a user has open directly affects processor resources, select this number carefully.

8. In the *Minimum refresh rate* text box, type the **number of seconds** that will elapse between real-time report displays being brought up-to-date with the current switch activity.
9. In the *Login ACD* text box, use the drop-down menu to select the *DEFINITY ECS ACD* that will be the user's default ACD upon initial log in to the *CentreVu CMS* server.
10. Select the **+** button on the Toolbar or select *Add* from the Actions menu.



CAUTION:

Do not allow users to share the same user ID because this quickly consumes *Solaris* system processes.

Now that a user ID is established, you need to assign user access permissions to the ACD, Feature, Split/Skill, Trunk Group, Vector, and/or VDN subsystems.

Assigning user access permissions

You can monitor and administer many call center activities with the *CentreVu* CMS. The User Permissions feature is used to restrict *CentreVu* CMS user access to a need-to-know or need-to-do basis.

Users with an *Administrator* login type have access to the entire *CentreVu* CMS system. Secondary administrators, such as split/skill supervisors, are typically assigned a *Normal user* login type. These users may only require read or write access permissions to a limited number of ACDs, features, splits/skills, trunk groups, vectors, or VDNs.

Select User Permissions from the Tools menu to assign Read, Write, and Exceptions access permissions for each user ID in each of the following categories:

Category	Explanation
<i>ACD Access</i>	ACD Access is used to give the user the ability to see the data that is collected on a specific ACD.
<i>Feature Access</i>	<p>Feature Access is used to give the user the ability to use the different capabilities of the <i>CentreVu</i> CMS.</p> <p>When a user does not have read or write permission for a <i>CentreVu</i> CMS feature, that feature is not displayed in the user's menu options.</p>
<i>Main Menu Addition Access</i>	<p>Main Menu Addition Access is used to give you user the ability to add menu choices to the <i>CentreVu</i> CMS MainMenu.</p> <p>Main Menu Addition is only available if you are using <i>CentreVu</i> CMS from a terminal or through <i>CentreVu</i> Terminal Emulator.</p>
<i>Split/Skill Access</i>	Split/Skill Access is used to give the user the ability to view/modify individual splits/skills.

Category	Explanation
<i>Trunk Group Access</i>	Trunk Group Access is used to give the user the ability to view/modify individual trunk groups.
<i>Vector Access</i>	Vector Access is used to give the user the ability to view individual vectors. Use <i>CentreVu</i> Visual Vectors to create and edit vectors.
<i>VDN Access</i>	VDN Access does not appear in User Permissions when the feature that allows more than 2000 VDNs to be measured has been set to <i>Yes</i> .

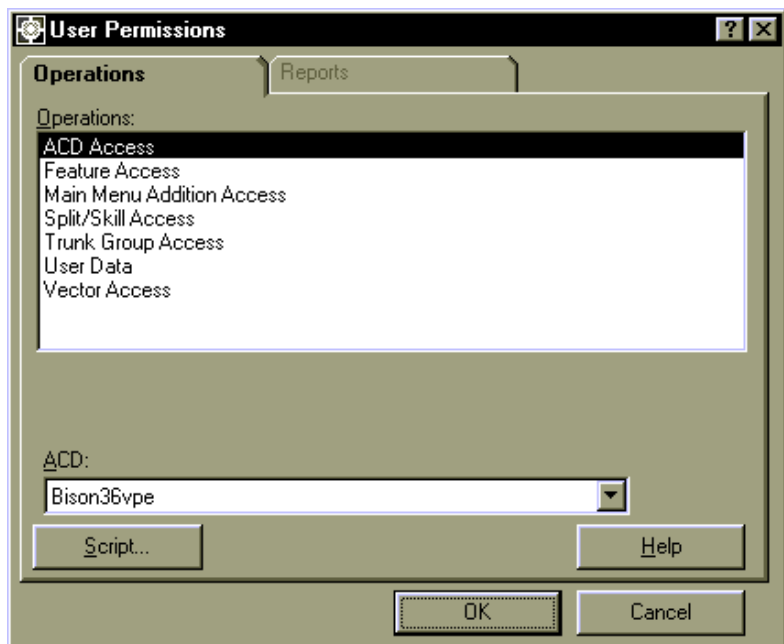


Tip:

Once a user's access permissions have been assigned, any modifications to ACD, Feature, Main Menu Addition, Split/Skill, Trunk Group, or User Data does not take effect until the user logs out and logs back in.

To assign user access permissions in any of the above areas, complete the following steps:

1. Select *User Permissions* from the Tools menu.
2. On the User Permissions selector window, which is shown below, highlight the operation (ACD Access, Feature Access, Main Menu Addition Access, Split/Skill Access, Trunk Group Access, Vector Access, or VDN Access) to which you want to assign permissions for the user ID.



3. Select *OK*.
4. Complete the appropriate text boxes in the displayed window and check *Read*, *Write*, and/or *Exceptions* for each item.
5. Select the **+** button on the toolbar or select *Add* from the Actions menu.



NOTE:

If you would like to modify access permissions that have already been assigned for a user, type the **user ID** in the *User ID* text box and select *Find one* from the Actions menu. The user's assigned access permissions display. Make the changes and then select *Modify* from the Actions menu.

CentreVu CMS user passwords

For system security, passwords are recommended for all *CentreVu* CMS user IDs (login IDs).

CentreVu CMS passwords are administered from the *Solaris* system, but may be changed locally. This section presents guidelines for selecting a valid password, a procedure for changing it, and procedures for replacing a forgotten password.

Rules for selecting a valid password

The following requirements apply to password definition:

- A password must have at least six characters.
- A password must have at least one number or special character and at least two alphabetic characters.
- When a password is changed, the new password must have at least three characters that are different from the previous password.

Changing a user's password



NOTE:

To change a user's password, you must be logged in through the *CentreVu* Terminal Emulator under the user ID for which you want to change the password.

To change a user's password, complete the following steps:

1. From the *CentreVu* CMS MainMenu, press the F3 key to select the Commands menu.

The Commands menu displays.

2. Highlight *Password* and press *Enter*.

The screen clears and the *Enter login password* prompt displays.

3. Type the **current login password** and press *Enter*.
4. Type a **new password** and press *Enter*.
5. Re-enter the **new password** and press *Enter*.

When you finish entering a new password, you are automatically returned to the *CentreVu* CMS MainMenu.

Replacing forgotten passwords



NOTE:

Only a *CentreVu* CMS administrator who is working on the *Solaris* system through a terminal or *CentreVu* Terminal Emulator can replace a forgotten password.

To replace a password that has been forgotten by a user, complete the following steps:

1. From the *CentreVu* Terminal Emulator, log in to the *CentreVu* CMS using the **root login ID** and **password**.
2. At the # prompt, type **passwd <userid>** and press *Enter* to prompt for a new password (where <userid> is the user ID of the user whose password you are replacing).
3. When prompted, type the **new password** and press *Enter*.
4. At the # prompt, type **passwd -f <userid>** and press *Enter*.

This command requires the user to create a different password (from the one you entered the next time he/she logs in).

5. At the # prompt, type **exit** to log out.
6. Inform the user of the new password and then have the user log in. The user will be prompted to change the password when they log in.

Managing features

This section includes the administrative tasks that you will most frequently need to perform in the call center.

The topics included in this discussion are:

- Timetables, including how to locate and edit existing timetables
- Scripting, including creating scripts to print reports, export report data, and schedule other operations to run automatically
- Assigning Dictionary names, including creating an agent group on the *CentreVu* CMS
- Running reports
- Defining Exceptions, including how using exception reporting can help your business and administering and activating exceptions on the *CentreVu* CMS
- Tracking ACD activity, including stroke counts, event counts, AUX reason codes, call work codes, and logout reason codes.

Creating and scheduling timetables

What is a timetable?

You can use the *CentreVu* CMS Timetable function to schedule one or more tasks (actions) for completion at a specified time that is convenient and non-disruptive to your call center's operation.

The event(s) that runs the task(s) you create in the Timetable input window is called a timetable.

The most common use of timetables is to complete redundant tasks, such as running backups on a monthly basis or running a specific report at the end of each day.



CAUTION:

Because of PC-related issues, it is strongly recommended that critical activities (such as backups or changes to VDN-to-vector assignments) be scheduled through Timetable, which resides on the *CentreVu* CMS server.

Things to know before you start

Below are some of the points you should know before creating timetables:

- You can define up to 100 tasks for each timetable and schedule each timetable's start time.
- You can schedule up to five timetables to run at the same time.
- Timetables that fail to run will be logged to the customer error log. The *List all* action item on the Timetable window also displays the status of timetables.
- You cannot delete or modify a timetable for which you are not an owner.
- You must have user permissions for any of the tasks that you include in the timetable in order for the tasks to execute.

Timetable input window

Think of the Timetable input window as the part of the program that schedules *when* the action will take place (see "Scheduling a timetable"). The second part of the program is to identify *what* tasks will run in the timetable (see "Creating the tasks in a timetable" to learn how to assign tasks to the timetable). See the *CentreVu® Call Management System Release 3 Version 8 Administration* (585-210-910) book for more detailed instructions on creating a timetable and more information on the timetable content tasks.

You can access the Timetable input window from the *CentreVu* CMS MainMenu. At the MainMenu, press F4 to access the Keep menu, highlight *Timetable*, and press *Enter*.

Timetable	Bison
Timetable name: <u>fullBackup</u>	Add
Description: <u>timetable for full backup</u>	Copy
<u>s</u>	Delete
User ID: <u>cms</u>	Find one
Start time: <u>1:23 AM</u>	Get contents
Start date: <u>12/10/97</u>	List all
	Modify
	Next
	Previous
Frequency and attributes (Select only one):	
<_> Once	
<_> Dates: _____	

<_> Hourly, Stop time: _____	
<x> Daily,	
Hourly/Daily Days (Select any you wish):	
[] Sunday [x] Thursday	
[x] Monday [x] Friday	
[x] Tuesday [] Saturday	
[x] Wednesday	
1 matches found	

Pressing the down arrow (↓) or the Tab key moves the cursor to the next field on the Timetable input window.

The following table defines what you should enter in each of the Timetable input window fields. Where it is helpful, an example of the entry is provided. This will help you understand what to enter in each of the fields in the Timetable input window.

Field	Description
<i>Timetable name</i>	A unique name that describes the contents of the timetable. It can consist of up to 20 characters and is case sensitive
<i>Description</i>	(Optional) A description of the timetable. It can consist of up to 50 characters.
<i>User ID</i>	Your <i>CentreVu</i> CMS user ID.
<i>Start time</i>	A future time that you want this timetable to begin running and continue to run based on the frequency that is selected below. The am/pm format (for example, 2:30pm) or the military format (for example, 14:30) is recommended for the time entry.
<i>Start date</i>	<p>A future date that you want this timetable to start running. You can use the month/day/year format (for example, 10/1/99) or a “+” offset based on today (for example, +1 indicates tomorrow).</p> <p>Even though the timetable may continue to run based on the Frequency category that you selected, think of the Start date as the timetable’s first day on the job or a fixed date.</p>

*Frequency and
attributes
(Select only
one):*

Once—Select when you only want the timetable to run one time.

Dates—Use for monthly timetables or any specific date. For monthly timetables, type the specific day each month that you want this timetable to run (for example, 1/1/00, 2/1/00, and 3/1/00 in each individual row and field).


Hourly, Stop time—Choose if you want a timetable to run each hour up to the Stop time specified.

Daily—Select to run the timetable on the days specified in:

Hourly/Daily, Day—Type an **X** next to the days you want the timetable to run.

For instance, if you want a backup to run after the close of business every weekday but after the daily archiving has completed, you might select Daily as your Frequency, a start time that is after the archive start time, and Tuesday through Saturday for the Days.

In the upper-right corner of the Timetable input window is the Action List. Below is a description of the events that occur for each of the actions available on the Timetable input window.

Action	Description
<i>Add</i>	Use to create a timetable.
 NOTE: When <i>Add</i> is selected, the <i>CentreVu</i> CMS MainMenu is displayed with <i>Keeping Entries</i> populated on the bottom of the border to indicate that the timetable tasks are being recorded.	
<i>Copy</i>	Copies an existing timetable and all of its contents.
<i>Delete</i>	Deletes a timetable and all of its contents.
<i>Find one</i>	Searches for entries that match the values populated in the timetable input window fields.
<i>Get contents</i>	Lists the tasks that are associated with a timetable.
<i>List all</i>	Brings up a secondary window that lists all of the timetables that match the values that are populated in the Timetable input window fields.
<i>Modify</i>	Updates the database entry on the timetable window to reflect the new data entries.
<i>Next</i>	Displays the next match found after selecting <i>Find one</i> .
<i>Previous</i>	Displays the previous match found after selecting <i>Find one</i> .

Scheduling a timetable

Creating a timetable is a two-part process. The first part schedules *when* the event will take place and the second part distinguishes *what* tasks or actions will occur.



NOTE:

To exit the timetable creation process at any time without saving any changes, select Stop from the Keep menu (accessed by pressing the F4 key), and then answer **n** to the save changes acknowledgment.

To create a timetable and schedule how frequently the timetable will process, complete the following steps:

1. Access the *CentreVu* CMS MainMenu through *CentreVu* Terminal Emulator.
2. Press F4 to select the Keep menu.
3. Highlight *Timetable* and press *Enter*.
4. Type a unique **name** that describes the contents of your timetable in the *Timetable name* field.
5. Type a **description** of the timetable in the *Description* field (optional).
6. Type your **user ID** in the *User ID* field.
7. Type the **time** that you want the timetable to start running in the *Start time* field.
8. Type the **date** that you want the timetable to start running in the *Start date* field.
9. Type an **x** next to one of the *Frequency* categories to define how often the timetable will run.

Once you make your selection for all of the fields in the Timetable input window, the system knows when you want the timetable to run and the first part of creating a timetable is complete.

Creating the tasks in a timetable

Now you need to complete the second part of the timetable. This involves assigning the tasks that are contained in the contents of the timetable and will run at the scheduled time.

To add tasks to a timetable, complete the following steps:



NOTE:

These steps assume that you are continuing this task from the previous section, “Scheduling a timetable.”

1. Press *Enter* to move to the Actions menu.
2. Highlight *Add* and press *Enter* to save the basic timetable information and proceed to adding tasks to the timetable.

If all of the entries on the window are valid, then *Successful* appears on the Timetable input window status line and the *CentreVu* CMS MainMenu is displayed.

3. From the *CentreVu* CMS MainMenu, highlight the task (using normal menu selection rules) that you want to schedule on the timetable.

The status line at the bottom of the *CentreVu* CMS MainMenu shows *Keeping Entries*, indicating that the actions or tasks you select are being recorded.

4. Complete the required field entries on the user window, and then select an action list item.

When each action list selection is made and validated, *Entries Stored* is displayed on the status line of the current user window.

5. Repeat entering the required field entries on each of the user windows and action list selections for each task you want to schedule in this timetable.

6. When you are finished adding tasks to this timetable, press F4 to select the Keep menu, highlight *Stop*, and press *Enter*.

An Acknowledgment window is displayed.

7. Select **y** and press *Enter* to save the tasks that are contained in the timetable.
8. Press the F5 key to select *Exit* and close the Timetable window.

You have now completed the second part of creating a timetable by identifying what the timetable tasks are.

Locating an existing timetable

Sometimes you need to make changes to your timetable.

To edit an existing timetable, you first need to locate that timetable by completing the following steps:

1. Press F4 to select the Keep menu.
2. Highlight *Timetable* and press *Enter*.
3. Press **Control** and **Z** simultaneously to clear all entries in the Timetable input window.
4. Type the unique **name** that describes the timetable you want to edit in the *Timetable name* field.



NOTE:

The *Timetable name* field is case sensitive, so be sure to enter the name exactly as it was originally defined.

5. Press *Enter*, select *Find one* from the Action list and press *Enter* again.

The system populates the scheduling parameters for the timetable you want to edit.

6. Press *Enter*, select *Get Contents* from the Action list, and press *Enter* again.

The Timetable: Get Contents window displays with a list of the tasks the timetable contains and you are in the *Keep* mode for editing the timetable.

You are now ready to perform any editing function for the tasks contained in your timetable. For additional instructions on how to copy, delete, globally edit, or modify timetable tasks, refer to the *CentreVu® Call Management System Release 3 Version 8 Administration* (585-210-910) book.

Editing tasks in an existing timetable



NOTE:

Unless your *CentreVu* CMS user ID is an *Administrator* login type, only the owner of the timetable can edit the timetable.

Let's say you want to add a task to your timetable named "Holiday Start", so that a new VDN is added to the already established list of VDNs that are assigned to the holiday vector.



NOTE:

Once you are in the Get contents window for the timetable, you will probably need to press F6 to activate the scrolling feature. The scrolling feature enables you to move through all of the tasks in the timetable. When you are done editing the timetable, you need to press F6 again to deactivate scrolling.

1. In the *Task number(s)* field, type the **number of the task** that you want your new task added after and press *Enter*.

The CMS MainMenu appears, with *Keeping Entries* displayed in the status line.

2. Highlight *Call Center Administration* from the main menu and press *Enter*.
3. Select *VDN Assignments* from the Call Center Administration menu.
4. Type the required information (the new VDN number and the “Holiday Start” vector name) in the fields of this window, and press *Enter*.
5. Press *Enter* again to select the *Run* action.

The *Entries stored* message is displayed.

If you want to add more tasks, repeat steps 2 through 5. Once you have finished adding tasks, press the *Keep* (F4) menu.

6. Press F4 to select the *Keep* menu.

A prompt asks if you want to save your changes.

7. Type **y** to save the changes and press *Enter*.

The *Timetable: Get Contents* window is displayed with the new task(s).

8. Press the F5 key to select *Exit*.

The *Get Contents* window closes and the *Timetable input* window is displayed.



WARNING:

The type of timetable described in this example should always be tested prior to use on the specified holiday. The testing will ensure that the timetable will run as you expect it to.

Creating and scheduling scripts

What is a script?

A script is a set of commands that automates actions to run on the *CentreVu* CMS server or the *DEFINITY* ACD. Scripting is the *CentreVu* Supervisor feature that you can use to create scripts.

The most common uses of Scripting is to create scripts for changing agent skills, running a report, or exporting report data.

When scripts are created and saved, you need to specify whether the script is *interactive* or *automatic* (with *automatic* being the default). The exception to this is when a script is saved from the Select a Report window or from an Operations selector window. In these cases, the only option is to create an *interactive* script. Below is a description of each type of script.

■ Interactive scripts:

- Run in the current Supervisor session.
- Display the script activities on the PC.
- Are similar to the *CentreVu* CMS ASCII interface Shortcut.

■ Automatic scripts:

- Launch a new Supervisor session that logs in to the *CentreVu* CMS server and runs the requested tasks in the background.
- Require the PC on which the script resides (was created) to be running when the script is scheduled to run.
- Do not display the activities related to the script on the PC.
- Are similar to the *CentreVu* CMS ASCII interface Timetable.

Things to know before you start

Below are some of the points you should know before creating scripts:

- You must have the appropriate User Permissions to run the operation that is being requested in the script.
- You are limited to a maximum of four simultaneous Supervisor sessions from one PC (including automatic scripts).
- Once a script is created, it can be manually executed like other *Windows*-based executable files.
- If the PC on which the script resides is turned off, then the script will not run at the appointed time.
- If you change your user password, you must also change the passwords to scripts.

Administration preparations for automatic scripts

You need to set Controller options for your *CentreVu* CMS user ID to allow *automatic* scripts to be scheduled and to run from your PC. You also need to set a user ID and password to allow the script to log in to the *CentreVu* CMS server.

To set Controller options, complete the following tasks:

1. From the Controller, select *Options* from the Tools menu.
2. Select the Scripting tab.
3. Complete the input window.

For details on each of the fields in this window, press F1.

4. Select *OK*.

To set a user ID password for scripting, complete the following steps:

1. From the Controller, select *Options* from the Tools menu.
2. Select the Scripting tab.
3. Select the *Set User* button.
4. Complete the input window with the following information:
 - *User ID:* Type your *CentreVu* CMS **user ID**.
 - *Password:* Type your *CentreVu* CMS **password**.
 - *Confirm Password:* Reenter your **password**.
5. Select *OK*.

Using Scripting to automatically print historical reports

This section provides instructions on creating the script that is required to print a historical report and then explains how to schedule the script to run.

Scripting historical reports

It is easy to schedule reports to print automatically at a convenient time. The first task that you must complete is creating the script that runs the actual report.

To create a script that will automatically run a historical report, complete the following steps:

1. From the Report selector window, highlight the Historical Report you want to print and select *OK*.



NOTE:

Be sure the appropriate ACD is selected. If you do not know how to select an ACD, refer to the *CentreVu® Call Management System Release 3 Version 8 Administration* (585-210-910) book.

The Report input window is displayed.

2. Complete the Report input window with the values for which you want your report to print data.

For instance, if you want a historical report to print yesterday's data each morning, then type **-1** in the *Date(s)* field. When the automatic script executes, the report will run with the inputs you selected.



NOTE:

You are creating an *automatic* script. When this script is executed the output is directed to your default printer. Therefore, you do not need to specify a *Destination* from this input window.

3. Select *OK*.

The selected report's output window is displayed.

4. Select *Script* from the Report menu.

The Save as Script window is displayed. By default, Automatic script is set for the Save as type field.

5. Complete the *Save in:* and the *File name:* fields on the Save as Script window.
6. Select *Save*.

You have created and saved the script that, when executed, will print the report. Continue with the next section to schedule the report to print.

Scheduling scripted reports to print

Reports can be scheduled to print automatically at a convenient time.



NOTE:

To run an *automatic* script at a specific time, a scheduling package must be installed on your PC.

Although you have a choice of many scheduling packages, the following three scheduling packages have been tested with the Scripting interface. This is not an endorsement for any of these packages.

- Microsoft's System Agent (part of the *Windows 95 Plus Pack*)
- Task Scheduler (part of Microsoft Internet Explorer 4.0 for *Windows 95*, *Windows 98*, and *Windows NT 4.0*)
- Unisyn Software LLC AutoMate™ Professional for *Windows 95*, *Windows 98*, and *Windows NT*

Refer to the scheduling package documentation for instructions on scheduling the script to run.

Using Scripting to export report data

The ability to export report data gives you the ability to use the report data from the ACD in other applications. A common use of this feature is exporting report data for use in a *Microsoft* Excel spreadsheet.

To automatically export report data, complete the following steps:

1. Select one of the *data export* items from the Edit or pop-up menus on a report output window.

The Export Chart Data, Export Table Data, or Export All Data window is displayed.

2. Complete the data export window, but **do not** select *OK*.

3. Select the *Script* button.

The Save As Script window is displayed.

4. Complete the *Save in:* and the *File name:* fields on the Save as Script window.

Execute the script to run the report with the script inputs, export the resulting data, and then exit the report.

Using Scripting to schedule operations to occur automatically

In addition to scheduling reports, you may want to create a script for some of the call center operations that you perform. Below is an example of an operation you might want to automate.

Scripting an agent trace

You may receive requests to trace agent activities. You can use Scripting to create scripts that run an agent trace and then schedule the scripts to run automatically.

To create a script that activates an agent trace at a time that is appropriate to the agent's work schedule, complete the following steps:

1. From the Agent Administration selector window, highlight *Activate Agent Trace* and select *OK*.



NOTE:

Be sure the appropriate ACD is selected. If you do not know how to select an ACD, refer to the *CentreVu® Call Management System Release 3 Version 8 Administration* (585-210-910) book.

The Activate Agent Trace window is displayed.

2. Type the **Agent name** or **login id** for which you want to trace call activity and select the *Agent Trace-On* button.

3. From the Action menu, select *Script*.

The Save as Script-Action window is displayed. By default, *Modify* is selected for the Action field.

4. Select *OK*.

The Save as Script window is displayed.

5. From the Save as Script window, select the folder in which to save the script, type a **unique name** for the script file (or you can accept the default file name already displayed), and accept *Automatic* as the script type.

The Save as Script acknowledgment window is displayed, indicating that the script has been saved.

6. Select *OK*.

Organizing your scripts

As you create more scripts, it is easier to keep them in order and manage them if you organize them into unique folders. By selecting *Organize Scripts* from the Scripts menu, you can perform conventional file operations.

From the *Organize Scripts* window, you can:

- Create new folders.
- Rename scripts and folders.
- Move scripts and folders.
- Delete scripts and folders.

Assigning Dictionary names

The Dictionary subsystem can be used to assign names to call center entities, including login IDs, split/skills, call work codes, ACDs, agent groups, AUX reason codes, call profiles, logout reason codes, trunk groups, VDNs, and vectors. The assigned names then appear on reports, making them easier to interpret. The ability to assigning Dictionary names is especially useful for the entities, such as VDNs, that often have complex numbering schemes.

Things to know before you start

Below are some of the points you should keep in mind when assigning Dictionary names to call center entities:

- Names (synonyms) must begin with an alphabetic character.
- Dictionary names can have from 1 to 20 characters.
- Names can include the underscore (_), blank (), comma (,), period (.), single quotes ("), and plus sign (+). Blanks () are allowed in all Dictionary names except Calculation names and constant names (numbers) that are used in calculations.
- Descriptions can have 1 to 50 characters. Descriptions can include all printable characters except the semicolon (;), backslash (\), grave accent (`), tilde (~), pipe (|), asterisk (*), and question mark (?).
- Names must be unique within each section of the Dictionary. For example, you can name trunk group 1 *sales* and split/skill 1 *sales*, but you cannot name split/skill 1 *sales* and split/skill 2 *sales*.
- Pattern searching is enabled for string fields. For example, if you know that a field entry begins with the letters *ac*, you can type *ac** in the field. The asterisk (*) matches any characters that follow the *ac*. The result may be several matches, no match, or one match. If you type an asterisk in the field or leave the field blank, you get a list of every name in Dictionary.

- The question mark (?) searches on a single character. For example, if you search on the letters *ac* and you type *ac?*, the question mark matches any single character that follows the *ac*.

Add a name for a call center entity

Use the following steps to give a call center entity (login IDs, split/skills, call work codes, ACDs, agent groups, AUX reason codes, call profiles, logout reason codes, trunk groups, VDNs, and vectors) a name that will display in reports:

1. Select *Dictionary* from the Commands menu.
2. Highlight the *call center entity* on the Operations tab.
3. Select *OK*.

The input window is displayed.

4. Complete the input fields:

Field	Description
<i>name:</i>	Enter the name that you want to display in reports.
<i>number:</i>	Enter the number of the entity with which you want the name associated. For example, enter the number of the VDN.
<i>description:</i>	Enter a description of the item. For example, describe the type of VDN and the telephone number associated with it.

5. Select *Add* from the Actions menu or select the *Add* button.

Creating an agent group

You can create agent groups for reporting purposes. This feature allows you to report on a specific set of agents, regardless of their split/skill assignments.

To create an agent group, complete the following steps:

1. Select *Agent Groups* from the Dictionary Operations window.
2. Select the *ACD* on which you want to create the agent group.
3. Select *OK*.

The Agent Groups window is displayed.

4. Type the **name of the agent group** that you want to create.

The group name should be descriptive and reflect your reasons for creating the group.

5. Select *Add* from the Actions menu or select the *Add* button.

The agent group is now created but does not have any agents assigned to the grouping. Complete the following steps to add agents to the group:

6. Select *Get contents* from the Actions menu or select the *Get contents* button.
7. Enter the **Login IDs** (or extensions) of the agents who you want to add to this group.
8. Select *Add* from the Actions menu or select the *Add* button.



NOTE:

If you remove an agent from an agent group, you will no longer see historical data for that agent on any reports that you run for that agent group.

Running Reports

The *CentreVu* CMS provides you with many reports that you can view using *CentreVu* Supervisor. In addition to these standard reports, you can create your own reports that are specific to your call center.

For complete details about all of the standard reports available to you, refer to the *CentreVu® Supervisor Version 8 Reports* (585-210-929) and the *CentreVu® Call Management System Database Items* (585-210-939) books.

For instructions on creating your own reports, refer to the *CentreVu® Report Designer* (585-210-930) and the *CentreVu® Custom Reports* (585-215-822) books.

You can run standard reports on any measured subset of the ACD, including agents, splits/skills, trunks/trunk groups, VDNs, vectors, call work codes, and call records. Reports are also available for Agent Administration, Call Center Administration, Dictionary, Exceptions, and Maintenance.

To run a report, complete the following steps:

1. Select *Reports* from the Commands menu.
2. Select *Real-Time*, *Historical*, or *Integrated*.
3. Select a *report* from the Reports list box.
4. Select the *ACD* for which you want to run the report.
5. If you want to schedule the selected report to run at a certain time, select the *Script* button.

The *Script* button displays the Save as Script window, which lets you create a new script for the selected report, but does not run the report. The script type is set to interactive and cannot be changed.

6. Select *OK*.

The Reports input window is displayed. The inputs required vary, depending on which report you are running.

7. Fill in the *input fields*.

Input fields are where you specify the information for which you are running the report. To complete the input fields, do any of the following:

- Type in the name or number of the input requested.
- Select the Browse button to view all of the available inputs.
- Use the history list to select an input that you have previously used.

8. For all reports (other than real-time and integrated), select the *report destination*.

Reports can be viewed on screen or printed to any printer to which your PC is connected.

To select the report destination, do one of the following:

- Select *View Report on Screen*, or
- Select *Print Report on* destination and choose a printer.

9. Ensure that the correct ACD is selected.

The current ACD is displayed at the bottom of the input window.

If you want to run a report for a different ACD than is selected, do the following:

- a. Select *Cancel* to exit the input window.
- b. Go to the selector window you chose in Step 3.
- c. Change the *ACD* on the selector window.
- d. Select the report you want to run.
- e. Select *OK* to return to the input window.
- f. Complete the input window.

10. Select *OK*.

Defining Exceptions

An exception is a type of activity in the ACD that falls outside of the limits that you have defined. The *CentreVu* CMS includes an Exceptions subsystem that collects the exception data from the ACD and produces reports. You can use the Exception reports to help improve the performance of your call center.

Exception conditions usually indicate abnormal or unacceptable performance in the ACD by agents, splits/skills, trunk groups, VDNs, or vectors. Use the *CentreVu* CMS Exceptions options to do the following:

- Define conditions for ACD activity for which you want notification. Activities may include agents, splits/skills, trunk groups, VDNs and vectors. The types of exceptions available vary for each activity, but include such options as Time in Queue and Hold Time.
- Run the Real-time Exception Log.
- Generate reports on agent, split/skill, trunk group, VDN, vector, malicious call trace, and other exceptions.

Setting the exception thresholds

To administer and activate exceptions, complete the following steps:

1. Select *Exceptions* from the CMS Tools menu.
2. Select the Operations tab.
3. Select the *exception type* for which you want to complete administration (agent, split/skill, trunk group, VDN, vector, or real-time exceptions log).
4. Set the *threshold levels* to a number between 0 and 999.
5. Select *OK*.

Activating data gathering

If your system is not showing current data in reports or otherwise shows signs of not gathering the ACD data, then you need to turn on Data Collection.

Turning on Data Collection

To turn on Data Collection, complete the following steps:

1. Select *CMS System Setup* from the Tools menu
2. Select the Operations Tab
3. Select *Data Collection*

The Data Collection input window is displayed.

4. Select the *ACD* from which you want to collect data from the drop-down menu.
5. Select the *On* button.
6. Select *Modify* from the Actions menu.

Tracking call activity

There are a number of different ways to track particular call types or activity in your call center. This section describes the different choices available and when to use each.



NOTE:

The administration for all of these activities is initially established on the *DEFINITY* ECS and the agents use their telephones to record specific call events. Refer to the *DEFINITY* ECS documentation for information on administering these features.

Stroke counts (event counts)



NOTE:

Stroke counts are sometimes referred to as event counts.

Stroke counts can represent any call event, including a successful sale, a call from a demographic category, or a response to a promotion. Up to nine stroke count buttons can be assigned to an agent's telephone. Agents press these buttons on their telephones to record specific call events. *CentreVu* CMS then stores the data, which can be viewed on the Agent Event Count report. Stroke counts are only recorded while an agent is on an ACD call or in call-related after call work. Stroke count button 0 is reserved for audio difficulty.

AUX reason codes

Auxiliary reason codes enable a call center to track an agent's time more precisely when the agent is in the AUX state. The agent enters the AUX reason code to specify the reason for being in AUX (for example, lunch or a meeting) by entering a previously-assigned digit, 0 through 9.

Names can be assigned to the AUX reason codes through the Dictionary menu in *CentreVu* Supervisor. These names then appear in *CentreVu* Supervisor standard real-time and historical reports under the AUX Reason Code headers.

AUX reason code 0 is used for cases when the *DEFINITY* ECS automatically puts an agent into AUX (for example, when Redirect On No Answer has been initiated).



NOTE:

The Expert Agent Selection (EAS) feature is required to use AUX reason codes.

Call Work Codes

A Call Work Code (CWC) is a number that represents a particular call type or activity—for example, a sale item, complaints, repeat orders, promotional ads, or sales made using a credit card. While still on an ACD call or in after call work associated with a call, an agent uses the dial pad on their telephone to enter a CWC. The CWC is from 1 to 16 digits long and is followed by the # sign to signal completion to the *DEFINITY* ECS.



CAUTION:

If the agent does not press the # sign after entering the CWC digits causes any data that is being reported to *CentreVu* CMS to be lost.

To avoid the loss of data, it is important to allocate the number of CWCs to be saved by *CentreVu* CMS in the Data Storage Allocation window, which is accessible from the CMS System Setup menu.

Names can be assigned to CWCs through the Dictionary menu in *CentreVu* Supervisor. These names are then displayed in *CentreVu* Supervisor standard CWC reports, that are stored in the Other category of Historical reports.

To simplify using CWCs, we recommend you specify a fixed number of digits for all CWCs. CWC 0 is always assigned and cannot be deleted. It is used to collect information on unadministered CWCs.

Logout reason codes

Logout reason codes are much like AUX reason codes. Agents enter logout reason codes to specify the reason they are logging out, such as the end of a shift or training, by entering a digit from 0 through 9. A 0 is used when the system logs an agent out, or if the agent does not specify a code.

The default name of the reason code can be modified through the Dictionary menu in *CentreVu* Supervisor. The logout name appears in the Agent Login/Logout and Agent Trace reports under the Logout Reason header.



NOTE:

The EAS feature is required to use Logout reason codes.

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Service observing

The service observing capability provides the means to obtain information on individual calls. This information can help you to assess the quality of service based on your company's predefined criteria or quality requirements. This section describes the forms and fields used to administer the service observing capability on your *DEFINITY* ECS, and the methods of service observing that are available and how to use each one. In this discussion, the supervisor who is observing calls is referred to as the "observer" and the terminal, attendant, or logical agent being observed is referred to as the "agent."



CAUTION:

Service observing may be subject to federal, state, or local laws, rules, or regulations or require the consent of one or both of the call parties. We recommend that you familiarize yourself and comply with all applicable laws, rules, and regulations before using this feature.

The topics included in this discussion are:

- Administering service observing
- Service observing procedures
- Service observing indicators
- Things to consider when service observing
- Security precautions to consider with service observing.

Administering service observing

Service observing is administered on the *DEFINITY* ECS system. Basic service observing is set up to observe an extension, not all calls to all extensions at a terminal. Likewise, VDN service observing is set up to observe an agent in a VDN, not all agents in a VDN.

A summary of the required forms and their fields that require administration follows. The fields that you must administer will depend on the type of service observing that you are establishing.



NOTE:

There are many steps that you need to complete to enable service observing. The steps depend on the type of observing that you are establishing. For more detailed information about administering service observing, refer to the *DEFINITY® Enterprise Communications Server Administrator's Guide* (555-203-502).

Unless otherwise noted, each of the fields identified in the following summary should be set to **y** (yes).

Customer-Options System Parameters Form Required Service Observing Fields

Field	Administered for...
<i>Service Observing (Basic)</i>	<input type="checkbox"/> Basic observing <input type="checkbox"/> Logical Agent ID observing
<i>Service Observing (Basic) and Service Observing (Remote/By FAC)</i>	<input type="checkbox"/> Remote observing <input type="checkbox"/> Feature access code observing
<i>Service Observing (Basic) and Service Observing (VDNs)</i>	<input type="checkbox"/> VDN observing
<i>Vectoring (Prompting)</i>	<input type="checkbox"/> Vector-initiated observing

Class of Restriction Form Required Service Observing Fields

Field	Administered on...
<i>Can Be Service Observed</i>	<input type="checkbox"/> Agent's COR to allow the agent to be observed
<i>Can Be a Service Observer</i>	<input type="checkbox"/> Observer's COR to allow the extension owner to observe others
<i>Service Observing Permissions - Table</i>	<input type="checkbox"/> Observer's COR to grant permissions to observe each specific COR

Feature-Related System Parameters Form Required Service Observing Fields

Field	Administered for...
<i>Service Observing Warning Tone</i>	■ Notification of agent being observed
<i>Expert Agent (EAS)</i>	■ Logical Agent ID observing

Station (multi-appearance) Form Required Service Observing Fields

Field	Administered for...
<i>Button/Feature Button Assignment</i> (set to serv-obsrv)	■ Basic observing ■ VDN observing, or ■ Logical Agent ID observing

Feature Access(FAC) Form Required Service Observing Fields

Field	Administered for...
<i>Service Observing Listen Only Access Code</i> (enter the access code)	■ Remote/by FAC observing ■ VDN observing, or ■ Logical Agent ID observing
<i>Service Observing Listen/Talk Access Code</i> (enter the access code)	■ Remote/by FAC observing ■ VDN observing, or ■ Logical Agent ID observing

Service observing procedures

Once you finish administering each of the applicable fields on the required forms, you are ready to begin observing an agent.



NOTE:

When an agent who is being observed is not active on a call, the observer is in the wait state. When the agent becomes active on a call, the observer is bridged onto the call.

Observing extensions

To observe an agent extension, the observer presses the service observing button plus the agent's extension number. Initially, the observer is in the listen-only mode. While observing a call where an agent is having difficulty or giving out inaccurate information, the observer has the option to "break in" on the conversation. Pressing the service observing button toggles between the listen-only and listen/talk modes.



NOTE:

If a warning tone was administered on each system, then it lets agents and callers know when someone is observing a call. The parties hear a 2-second, 440-Hz warning tone before an observer connects to a call, followed by a half-second burst of this tone every twelve seconds during observation. If enabled, the conference tone may add a delay of two to three seconds before the connection.

Observing logical-agent IDs

Large call centers often move their people regularly and rely on using “universal agent” workstations. With EAS, an observer can observe agents based on their logical-agent ID regardless of the workstation they are working from or the telephone to which the agent is logged in.

The observer enters the logical-agent ID extension number of an agent who must be logged in to a telephone. The observer can monitor every ACD, personal, and direct agent call delivered to or placed by the agent, including calls placed to the physical extension.

NOTE:

Only one observer can observe a physical telephone at one time. An observer cannot observe a logical agent ID extension at a physical telephone that is already being observed. Likewise, an observer cannot observe a physical extension that is being observed as a logical-agent ID extension.

Observing VDNs

When observing through a VDN, the agent to be observed is randomly selected based on the vector and call distribution. Use this service observing capability to get an overall sense of how the call center is performing.

To observe a VDN, the observer enters a specific VDN extension and bridges onto calls (one call at a time) that have started vector processing for that VDN. The observer hears all tones, call prompting, caller dialing, announcements, music, and speech that the agent and caller hear. If an observer is in a COR that is administered to hear VDN of Origin announcements and has a VOA Repeat button, he or she can hear and replay VDN of Origin announcements.

NOTE:

If the observer is using a display telephone, then the observer sees the name of the VDN, agent, or trunk as each is accessed in sequence by the VDN. For example, during vector processing the VDN name is displayed, but when the call connects to an agent, the agent name is displayed.

Observing remotely or by Feature Access Code

There may be times when you want to observe from outside of the physical call center location.

Remote observing is initiated through Remote Access or Call Vectoring. Observers can observe calls from a remote location or a local terminal using service observing Feature Access Codes (FACs). When observing remotely, observers must use FACs. Different FACs are required for listen-only and listen/talk modes. When observing locally or remotely by FAC, the observer cannot toggle between modes. Physical extensions, logical-agent ID extensions, and VDNs can be observed remotely.

With Remote Access, an observer accesses a switch via a trunk group dedicated to Remote Access or via a Direct Inward Dialed (DID) number to the Remote Access extension. Remote observing works with all types of DID trunks, including ISDN-PRI and tie trunks, and DCS over analog, T1, or PRI.

With Call Vectoring, an observer accesses a switch by dialing a VDN extension or a central office (CO) trunk that has a VDN extension as its incoming destination. Using route-to commands, you can design a service observing vector to allow a VDN call to directly access a specific extension to be observed or a service observing dial tone. At the dial tone, observers can enter any extension that they are authorized to observe.



Tip:

You can combine Call Prompting and Call Vectoring to provide security and to limit observation. For information about creating a service observing vector, see the *DEFINITY® Enterprise Communications Server Call Vectoring/EAS Guide* (555-230-521).

Deactivating service observing

Service observing is deactivated when the observer hangs up, selects another call appearance, or presses the disconnect or release button.

Service observing indicators

As an observer, you receive button lamp and/or tone indicators when you activate and use service observing. The following table shows the general service observing indicators that you will receive as an observer.

Condition	Button Lamp	Tone
Denied activation	Broken flutter	Intercept/busy/reorder
Activated	Steady/ winking	Confirmation tone followed by silence or connection to call
Observing (listen only)	Steady	Hear call
Observing (listen/talk)	Winking	Hear and talk on call
In wait state	Flash	None
Denied observing	Flash (wait state)	Silence or ineligible tone followed by silence

The *DEFINITY® Enterprise Communications Server Administrator's Guide* (555-203-502) provides additional details that describe indicators received when activation is:

- Denied.
- Allowed — at the time of activation.
- Allowed — after observe is activated.

Things to consider when service observing

Consider the following circumstances when you are using service observing.

Bridged observers

Although an agent can be a member of multiple splits/skills, an agent can be observed by only one observer at a time. If two agents with different supervisors are observed and one agent calls the other, the originator's supervisor observes the call and the other supervisor is placed in the wait state.

Ineligibility

On some occasions, a call to an agent extension or VDN is ineligible for observing. Some examples of when this might occur are when the call:

- Is already being observed.
- Has some type of Data Restriction activated.
- Is in a conference with six parties.
- Is a VDN-observed call that reaches an unobservable extension or VDN.

Multiple observers

Multiple observers can observe a single VDN simultaneously, but each observer will be observing a different call to the VDN.



NOTE:

Up to 50 VDN calls can be observed concurrently.

Trunk calls

If an agent being observed makes a trunk call, observation starts after the agent finishes dialing. For central office (CO) trunks, dialing is considered complete when answer supervision is returned or when answer supervision timeout occurs.

Refer to the *DEFINITY® Enterprise Communications Server Guide to ACD Call Centers* (555-233-503) for additional information on answer supervision.

Conferenced calls

An observer cannot initiate a conference while observing.

If an observed agent conferences a call and the number of conferenced parties is less than six, the observer is placed in the wait state until the call is connected. When the call is connected, the observer can observe the conference. In addition, the observer is bridged onto any call on which the agent becomes active before the conference is complete. When the conference is complete, the observer is again bridged onto that call.

If an observed agent conferences a call and the number of conferenced parties (including the observer) is six, the conference is denied.

A call to an observed VDN cannot be monitored if the observer, caller, and other parties bridged onto the call equals more than six parties.

If a conference is being observed because an observed agent entered the conference, when the agent hangs up, the conference is no longer observed. If a conference is being observed because an observed VDN call entered the conference, observing continues until the call is routed to an unobservable destination.

Conference members are observed during a conference regardless of their COR setting.

If a VDN call being observed is conferenced to an agent call being observed, the VDN observer continues to observe and the agent observer goes into the wait state. If two observers (of either VDN or agent calls) are conferenced to a call, the first observer conferenced in continues to observe and the second observer goes into the wait state. VDN or agent call observers hear the ineligible tone before going into the wait state.



NOTE:

The same rules apply when multiple observers monitor transferred calls.

Transferred calls

If an agent being observed transfers a call, the observer is placed in the wait state. Once the transfer is complete, the observer is bridged on and can continue monitoring the call until it is complete or the observer deactivates service observing.

A VDN observer continues to monitor the transferred call until it is transferred or routed to an unobservable destination, the observer deactivates service observing, or the call terminates.

Security precautions to consider with service observing

Depending on the service observing method that you are using, there are precautions that you can take to ensure the security of your system.

General security

Use the following COR restrictions to prevent unauthorized observing:

- For the observer, set *Can Be A Service Observer* on the COR form to **y**.
- For the agent to be observed, set *Can Be Service Observed* on the COR form to **y**.
- For the observer, grant permissions to all CORs to be observed on the Service Observing Permissions COR table.

VDN-call security

Use the following COR restrictions for VDN-call observing:

- For the VDN extension to be observed, set *Can Be Service Observed* on the COR form to **y**.
- Type a **y** next to the CORs of the VDNs to be observed in the observer's Service Observing Permissions COR table.

Vector-initiated security

Use the following guidelines for vector-initiated observing:

- Use Call prompting commands in service observing vectors to provide passcode protection and limit access to specific destinations or vector-verified, caller-entered digits.
- Use Time of Day/Day of Week checks in service observing vectors.
- Create a vector used exclusively for service observing.
- If you use route-to commands to observe a VDN extension, ensure that the extension has an observable COR.



CAUTION:

In vector-initiated service observing, COR assignments are used to determine if service observing is allowed. These assignments include the COR assigned:

- to the VDN used to initiate service observing.
- to the internal caller extension.
- to the agent to be observed.

If the agent's COR is not observable, observation fails regardless of the VDN or caller COR. When a call is routed through multiple VDNs, the COR of the last VDN is used for calling and observing permissions regardless of VDN Override settings.

Remote-access security

Use the following guidelines for remote observing:

- Use Barrier Codes and Authorization Codes to limit the use of Remote Access to authorized users.
- Use different Authorization Codes for different service observing permissions.
- Use Facility Restriction Levels (FRLs) and restrictions such as the Authorization Code COR to restrict Remote Access service observer access to other destinations (for example, stations or trunks).
- Use Call Prompting to create additional security.



NOTE:

Additional Remote Access security measures and codes are described in the *DEFINITY® Enterprise Communications Server Administrator's Guide* (555-203-502).

Managing backups

This section explains the different types of *CentreVu* CMS backups available and provides recommendations on when to run each kind of backup. Procedures on how to run backups and references on where to check the backup status are also included. Suggestions for tape management are also offered to aid in quick and accurate recoveries.

The topics included in this discussion are:

- Why run a backup?
- Types of backups
- Backup procedures
- Checking backup status
- Tape management
- Automating backups.

For more detailed information on completing backups of the CMS server, refer to the *CentreVu® Call Management System Release 3 Version 8 Administration* (585-210-910) and the *CentreVu® Call Management System Release 3 Version 8 Software Installation and Setup* (585-210-941) books.

Why run a backup?

Data is crucial to the successful operation of your call center. Therefore, backups are critical to the maintenance of your system. By regularly performing backups, you protect your *CentreVu* CMS data against the possibility of loss due to system failures, disk crashes, power outages, and so forth.



Tip:

Running backups while your system is running its daily data archive may cause performance problems. To maintain best performance, run backups either after archiving is completed or before archiving begins.



CAUTION:

With *CentreVu* CMS R3V8 and newer releases, the cmsadm backup does not back up historical data. To ensure that you have all of the data needed to complete a restore, you **must** run **both** the cmsadm backup and the full maintenance backup on a regular basis.

Types of backups

Most often, you will perform a maintenance backup. Depending on the capacity of your backup device and the amount of data to be saved, you can select either a Full or an Incremental maintenance backup. Most of the tape drives currently shipped with *CentreVu* CMS accommodate a Full backup on one tape. The following tables describe the various types of backups, the data that is saved, and recommended backup intervals.

Maintenance Backups	Data Saved
Full	Saves data for all of the time periods in the historical database in <i>CentreVu</i> CMS. A full Backup <u>must</u> be done prior to the first Incremental Backup.
Incremental	Saves <i>CentreVu</i> CMS data recorded since the last (incremental or full) backup completed. Only the historical data can be stored incrementally. Administration data is stored in a full backup.



CAUTION:

How frequently you perform Maintenance backups should be determined by how much data your call center is willing to lose in the case of a catastrophic failure.

File System Backup	Data Saved	Recommended Frequency
cmsadm	<ul style="list-style-type: none"> ■ Saves <i>Solaris</i> system files and programs ■ Saves non-CMS data you placed on the computer 	<ul style="list-style-type: none"> ■ Prior to upgrading <i>CentreVu</i> CMS to a new software load ■ As soon as possible after an upgrade ■ Monthly

Backup procedures

The following sections step you through the process of completing the different types of backups, including full maintenance backups and cmsadm backups.



NOTE:

Running a maintenance backup could impact system resources and should be scheduled to run accordingly.

Running a full maintenance backup for all ACDs

To run a full maintenance backup, complete the following steps:

1. Insert a tape in to the backup device.



NOTE:

On the 8-mm tape drive, the green (top) light flashes until the tape is ready. The yellow (bottom) light flashes when the system is reading from or writing to the tape. Do not remove the tape until the yellow light is out, the green light has stopped flashing and you no longer hear clicking.



Tip:

You can do a full backup over the most recent full tape backup. You can also do a full backup over an old incremental tape backup. As a precaution, you cannot do an incremental backup over your most recent incremental backup or your most recent full backup.

2. On the *CentreVu* Supervisor Controller, select *Maintenance* from the Tools menu.

3. On the Maintenance selector window, highlight *Back Up Data* in the Operations list and select the ACD for which you want to complete a backup.
4. Select *OK*.

The Backup Data window is displayed.

Backup Data

Actions Edit Help

Backups completed today: 0

Status:

Errors:

Device name: default

Verify tape can be read after backup? : ☒

ACD(s) to back up:

☒ All ACDs ☐ Current ACD

Data to back up:

☒ Local system administration data

☒ CMS system administration data

☒ ACD-specific administration data

☒ Historical data,


☐ Full ☐ Incremental

☒ Non-CMS data

☐ Specific tables


ST10


5. Complete the following options for each field on the window:

Field	Default value/action
<i>Device name:</i>	Accept the default device name.
<i>Verify tape can be read after backup?</i>	Selected
 NOTE: When you select the <i>Verify tape can be read after backup?</i> field, the system tries to read the data on each tape after the backup finishes writing it. This procedure is relatively fast and ensures that the system can read the data it wrote. If you receive an error message that the tape failed verification, you need to rerun the backup using a different tape.	
<i>ACDs to backup:</i>	All ACDs
<i>Data to backup:</i>	Local Administration Data ^a CMS System Administration Data ACD Specific Administration Data Historical Data, - Full
<i>Non-CMS data:</i>	Selected

a. Available beginning with R3V8

6. Select *Run* from the Actions menu or the *Run* button on the toolbar.

 **NOTE:**
Backups run in the background. You can exit the Backup Data window without affecting the backup process.

 **Tip:**
For a complete description of each of the fields in the Backup Data window, press the F1 key from within the window.

Running a cmsadm backup



CAUTION:

On systems prior to the *CentreVu* CMS R3V8, *CentreVu* CMS is shut off when backup is running. This means that no call center data is collected by *CentreVu* CMS during the backup. For systems running *CentreVu* CMS R3V8 and newer releases, cmsadm backups do not affect data collection.



NOTE:

Beginning with *CentreVu* CMS R3V8, the cmsadm backup does not back up historical data. This means that you must have a full maintenance backup to successfully complete a restore.



NOTE:

Prior to running a cmsadm backup, it is recommended that you reboot the *CentreVu* CMS server.

To shut down the system to an OK prompt, type **/usr/sbin/shutdown -y -g0 -i0**.

To shut down and restart the system, type **/usr/sbin/shutdown -y -g0 -i6**.

To run a cmsadm backup, complete the following steps:

1. From the *CentreVu* Terminal Emulator, log in to the *CentreVu* CMS using the **root login ID** and **password**.



NOTE:

You can run a cmsadm backup from the *CentreVu* Terminal Emulator or from the main console.

2. At the # prompt type **lp /etc/vfstab** and press *Enter*.



NOTE:

The information that is printed out should be kept with the cmsadm backup to be used if you ever need to perform a restore.

3. At the # prompt, type **cmsadm** and press *Enter*.

The *CentreVu* CMS Administration menu displays.

4. Select *backup* from the list of options.

Checking backup status

We recommend that you periodically check the *Status* and *Error* fields in the Backup Data window and the *CentreVu* CMS console for messages relating to the status of your backup.

Status messages

Use the *Status* field in the Backup Data window to check on the current or most recent maintenance backup. You can view details in this field to verify if there is a problem accessing the backup device or any tape constraints.

Error messages

Use the *Error* field in the Backup Data window to view any errors that occurred in the current or most recent maintenance backup.

If your backup fails with an error message, refer to the Maintenance - Error Log window in *CentreVu* Supervisor for an explanation of why the error occurred and what to do to fix it.

Console messages

When you do a maintenance backup that completes without any errors, the following message may display on the system console:

*Message: WARNING: ST01:HA 0 TC 3 U 0: ERR
60503005 CMD 0000008 Sense Key 00000003 Ext Sense
00000000.*

This message means that a new tape was used for the backup. Ignore this warning, and press **Ctrl+L** to refresh the screen.

Tape management

Managing the backup tape rotation, storage, security, and labeling the tape is essential in assuring that if a restore is needed it can be done quickly and accurately.

Tape rotation

Keep enough tapes on hand so that you can rotate them. This allows several backup tapes to be available at all times. One common scheme is to keep seven tapes in stock and recycle them weekly. That is, in an environment where backups are performed daily, a new tape is used each day of the week, and each weekly sequence is repeated.



CAUTION:

Backup tapes can wear out. Be sure to refresh your supply of backup tapes occasionally to avoid problems.

Labeling

After a successful backup, it is important that you label your backup tape. *CentreVu CMS* provides the backup information to put on the labels in the Backup Data window, or if the backup was scheduled on a timetable, in the Maintenance - Error Log. Refer to the Maintenance section of the *CentreVu CMS Administration* book for information on reading the label.

Storage

To minimize the time that your system is out of service, it is important that you store your backups in a secure location.



NOTE:

Use your company's disaster recovery policy for storage of the backup media.

Automating backups

Maintenance backups can be scheduled to run automatically at your discretion.

Although *CentreVu* Supervisor supports automating backups via its scripting capability, it is highly recommended that critical system backups be scheduled via the Timetable feature on the *CentreVu* CMS server. For information on how to create a timetable to run a maintenance backup and schedule it, refer to the “Creating and scheduling timetables” section in this book.



NOTE:

The cmsadm backup cannot be scheduled to run automatically.

The *CentreVu* CMS full maintenance backup can be scheduled to run automatically.

Managing backups

Automating backups

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Keeping records

Detailed records are vital in helping the system administrator optimize system operations. This section provides information on where to locate call center records and offers logs for you to use to record, manage, and organize your records.

Refer to the *DEFINITY System's Little Instruction Book for basic administration* (555-230-727) for guidelines on keeping records on your *DEFINITY ECS*.



Tip:

Keeping your records current and accurate will assist people who fill in for or replace system administrators and provide a speedy recovery for outages in system performance.

The topics included in this discussion are:

- Electronic system records
- Recording system information
- Before you contact Lucent Technologies for support.

Electronic system records

Many of your call center records are stored electronically and can be accessed from the *CentreVu* CMS.

Call center administration records

Below is a list of the call center records that can be accessed from the Call Center Administration selector window in *CentreVu* Supervisor.

- *Call Work Codes* — Number(s) assigned to track a particular call type or activity.
- *Split Parameters* (switches without Vectoring) — Delay time for prerecorded announcements, inflow and outflow queue thresholds, and intraflow type for the split.
- *Trunk Group Assignments* — The VDNs or non-vector controlled splits (or splits for systems without vectoring) your trunk groups are assigned to.
- *Trunk Group Members* (accessed from the Reports tab) — Trunk group members and their equipment locations for a particular trunk group.
- *VDN Assignments* — VDNs and the vectors they are assigned to.
- *VDN Skill Preferences* (Expert Agent Selection (EAS) systems) — The current skill preference VDN assignments.
- *Vector Configuration* (accessed from the Reports tab) — The trunk groups and VDNs that are associated with specific vectors (and the skill preferences assigned to the VDNs for EAS systems).

Agent administration records

Call center records for the following lists are accessed from the Agent Administration selector window in *CentreVu* Supervisor.

- *Agent Skills* (EAS systems) — Lists an agent's current skill assignments, along with the associated skill type or skill level.
- *Extension Split Assignments* — The split where the extension is currently assigned.
- *Split Members* (accessed from the Reports tab) — Lists the selected splits in numerical order, each split's assigned name (if applicable), and the extensions that are assigned to the split (if any are assigned).

User permissions records

User permissions records for user IDs can be accessed from the User Permissions selector window in *CentreVu* CMS.

- *User IDs* — Login IDs, default printer name, login type (Normal or Administrator), maximum number of open windows, minimum refresh rate for real-time reports, and the default login ACD for each user.

CMS system setup records

Below is a list of CMS system setup records that can be accessed from the CMS System Setup selector window in *CentreVu* Supervisor.

- *Switch Setup* — Switch type, switch release, purchased *CentreVu* CMS release and version, *CentreVu* CMS load designation, and *CentreVu* CMS administrable switch features (such as Call Vectoring, Call Prompting, and EAS) assigned during installation.

Maintenance records

Below is a list of maintenance records that can be accessed from the Maintenance selector window in *CentreVu* Supervisor.

- *ACD Status* — Call center items that *CentreVu* CMS is measuring (such as the number of splits/skills, agents logged in, trunk groups, trunks, VDNs, and vectors).
- *Connection Status* — Data link monitoring between the *CentreVu* CMS processor and the switch.

Recording system information

The logs in this section can be used by the system administrator as a quick and easy reference of the *CentreVu* CMS components that are vital to the operation of your call center. We recommend that you complete each of these logs when the system is installed, update them as you upgrade the system, and refer to them as needed for system support.

CentreVu CMS server log

Model of the <i>CentreVu</i> CMS server	
Location of the <i>CentreVu</i> CMS server	
Dial up telephone number to the <i>CentreVu</i> CMS server	

Recovery kit and software log

The Recovery kit consists of *CentreVu* CMS software and backups that are imperative to a speedy recovery of your system in the event of a system outage. The *Sun* software listed may vary depending on the release and version your *CentreVu* CMS server operates under and should be stored with the Recovery kit.

CMS Recovery kit software list:	√	Where is it <u>securely</u> located?
Latest <i>cmsadm</i> backup tapes		
Latest full (and incremental) maintenance backup tapes		
<i>CentreVu</i> CMS Load CD ROM (used for the last upgrade and any <i>CentreVu</i> CMS update CD ROMs used at the same time)		
CMS Supplemental Services		
Patching CDs and tapes		
Required software list for <i>Sun</i> platform:	√	Where is it <u>securely</u> located?
INFORMIX ESQ 9.14		
INFORMIX ILS 2.11		
INFORMIX SE 7.22		
Network Terminal Server (optional)		
<i>Solaris</i> Easy Access Server 2.0 (Online DiskSuite 4.2)		
<i>Solaris</i> 7 software, dated 3/99		
<i>SunLink</i> X.25 Network Interface 9.1 (optional)		

Use the following form to track all of the terminals and PCs that are used to access the *CentreVu* CMS.

[illegible]

Printer log

Use the following form to track all of the printers that are connected to serial ports for printing *CentreVu* CMS information and reports.

[illegible]

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Call Center Little Instruction Book for basic administration

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