Lucent Technologies
Bell Labs Innovations

CentreVu® Supervisor Version 8

Installation and Getting Started

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Introduction

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CentreVu
Supervisor

Preface

Overview

The *CentreVu*® *Supervisor Installation and Getting Started* document includes the following information:

- Instructions for installing *CentreVu* Supervisor (Supervisor) on a local PC from a network server or CD-ROM
- Procedures for installing Supervisor to a Shared Network Drive
- Procedures for uninstalling Supervisor
- Instructions for using Supervisor
- Procedures for installing and using *CentreVu* Terminal Emulator
- Guidelines for responding to error messages that may be displayed while installing Supervisor or logging into the *CentreVu* Call Mangement System (CMS) server.

NOTE:
CentreVu Terminal must be separately installed; it is not automatically installed by *CentreVu* Supervisor Version 8.

This document is intended for anyone who is installing the *CentreVu* Supervisor software on the *DEFINITY*® Enterprise Communications Server (ECS). It assumes that you are familiar with your PC and the *Microsoft** *Windows*† 95 or 98 or *Windows NT*‡ 4.0 operating systems, including standard *Windows* conventions.

The following sections are included in this Preface:

- Contents of this Document
- Conventions Used in this Document
- Related Documents.

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‡NT is a registered trademark of Microsoft Corp.

Contents of This Document

The document is organized into the following chapters:

Chapter 1 Introduction

This chapter introduces the *CentreVu* Supervisor application. It provides information on the following:

- The two methods of installation
- The items provided in the *CentreVu* Supervisor package
- The equipment required to run *CentreVu* Supervisor
- The Helpline numbers.

Chapter 2 Installing *CentreVu* Supervisor on a Local PC

This chapter walks you through the process of installing *CentreVu* Supervisor from a CD-ROM or the network onto a PC that will not access Supervisor over the network.

Chapter 3 Installing *CentreVu* Supervisor on a Shared Network Drive

This chapter describes the steps required to install the Supervisor application files (executables and default files) to a shared read-only folder on the network server.

Chapter 4 Uninstalling *CentreVu* Supervisor

This chapter describes the steps required to uninstall the *CentreVu* Supervisor Version 8 software.

Chapter 5 **Getting Started with *CentreVu* Supervisor**

This chapter walks you through the process of starting Supervisor, logging into a CMS server, logging out of a CMS server, and exiting Supervisor. It also teaches you how to change your connection settings and gives you information about getting help with the Supervisor product.

Chapter 6 **Performing CMS Operations**

This chapter defines how to use windows that display as a result of selecting an item from any Operations tab, including detailed information on the Actions menu items in Operations input windows.

Chapter 7 **Using *CentreVu* Supervisor Reports**

This chapter defines how reports are displayed in Supervisor and teaches you how to format and print reports, including selecting run dates and times. This chapter also gives detailed information on the Actions menu items available in report output windows and teaches you how to export report information to another *Windows* application.

Chapter 8 **Installing and Using *CentreVu* Terminal**

This chapter gives you general information about the *CentreVu* Terminal application and explains how to install the *CentreVu* Terminal application and how to set it up to connect to the CMS server.

Chapter 9 **Troubleshooting**

This chapter gives you information on error messages that you might receive while installing or using Supervisor and outlines basic troubleshooting procedures for the error messages.

Conventions Used in This Document

The following conventions are used in this document:

Convention	Description
Bold Text	Menu names, options, and icon names are shown in bold text. For example: Choose **Save** from the **File** menu.
Initial Capital Letters	Names of windows, dialog boxes, and keyboard keys. For example: This field is in the Manual Login window.
`Courier Text`	Text you are asked to enter and system commands. For example: Enter `this command.`
< >	Variable text is marked by less-than/greater-than signs. For example: Couldn't create <filename>.
KEY+KEY	Key combinations for which you must press and hold down one key and then press another. For example: ALT+4.
Italic Text	References to other documents, trademarks, and for emphasis.
" "	Sections and chapters that are referenced. For example: See Chapter 1, "Introduction," for an outline of the information in this book.
Click and Double click	*Button 1 (left-most mouse button or primary button).
Microsoft Windows or *Windows*	These terms are used to refer to both *Microsoft Windows* 95 or *98* and *Microsoft Windows NT* 4.0.

*Whenever you are asked to click or double click the mouse button, click button 1 (the left-most mouse button or primary button), unless button 2 (the right-most button or secondary button) is specified.

Related Documents

The following documents include additional information about the Call Management System or Supervisor:

- *CentreVu® Supervisor Version 5 User Guide* (585-215-829)
- *CentreVu® Call Management System Release 3 Version 8 Administration* (585-210-910)
- *CentreVu® Supervisor Version 8 Reports* (585-210-929)
- *CentreVu® Call Management System Release 3 Version 8 Database Items and Calculations* (585-210-939)
- *CentreVu® Call Management System Release 3 Version 5 Custom Reports* (585-215-822)
- *Lucent Version 8 Call Center Change Description* (585-210-925)
- *CentreVu® Call Management System Release 3 Version 8 External Call History Interface* (585-210-912)
- *CentreVu® Advocate User Guide (*585-210-927)
- *CentreVu® Call Management System Release 3 Version 8 Upgrades and Migrations* (585-210-913)
- *CentreVu® Report Designer Version 8 User Guide* (585-210-930)
- *CentreVu® Call Management System Release 3 Version 8 Hardware Maintenance and Troubleshooting* (585-210-919)
- *CentreVu® Call Management System Release 3 Version 6 Software Installation and Maintenance* (585-215-866)
- *CentreVu® Call Management System Release 3 Version 8 Planning, Configuration, and Implementation* (585-210-920)
- *Sun SPARCserver Hardware Installation* documentation, connectivity diagrams, and Maintenance and Troubleshooting documentation

CentreVu Supervisor

Introduction

About *CentreVu* Supervisor

The Lucent Technologies *CentreVu*® Supervisor (Supervisor) software is a graphical user interface to the Lucent *CentreVu* Call Management System Release 3 Version 8 (*CentreVu* CMS R3V8) or Call Management System Release 3 Version 6 (*CentreVu* CMS R3V6) software.

The Supervisor software runs on an *Intel** 486-compatible processor (a Pentium processor is preferred) that is running one of the following *Microsoft Windows* operating systems (see page 1-10 for more detailed requirements):

- *Windows* 95†
- *Windows* 98‡
- *Windows NT*** 4.0 with Service Pack 4.

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NOTE:
Supervisor is not supported for all languages of *Windows* operating systems. For information about which versions of Supervisor are supported for which *Windows* operating systems, see the table on the following page.

The following table shows which language-versions of Supervisor are supported with which *Windows* operating systems (✔ indicates that the operating system is supported).

Windows OS	Language	English	Dutch	French	German	Italian	Portuguese	Spanish	Japanese
English	*Windows* 95	✔	✔	✔	✔	✔	✔	✔	
	Windows 98	✔	✔	✔	✔	✔	✔	✔	
	Windows NT 4.0	✔	✔	✔	✔	✔	✔	✔	
Dutch	*Windows* 95	✔	✔						
	Windows 98	✔	✔						
	Windows NT 4.0	✔	✔						
French	*Windows* 95	✔		✔					
	Windows 98	✔		✔					
	Windows NT 4.0	✔		✔					
German	*Windows* 95	✔			✔				
	Windows 98	✔			✔				
	Windows NT 4.0	✔			✔				
Italian	*Windows* 95	✔				✔			
	Windows 98	✔				✔			
	Windows NT 4.0	✔				✔			

Windows OS	Language	English	Dutch	French	German	Italian	Portuguese	Spanish	Japanese
Portuguese	*Windows* 95	✔					✔		
	Windows 98	✔					✔		
	Windows NT 4.0	✔					✔		
Spanish	*Windows* 95	✔						✔	
	Windows 98	✔						✔	
	Windows NT 4.0	✔						✔	
Japanese	*Windows* 95	✔							✔
	Windows 98	✔							✔
	Windows NT 4.0	✔							✔

About *CentreVu* CMS

CentreVu Call Management System (CMS) is a software product used by customers who have the Lucent Technologies *DEFINITY*® Enterprise Communications Server (ECS) or Lucent telecommunications switches and receive a large volume of telephone calls that are processed through the Automatic Call Distribution (ACD) feature of the switch. The CMS server collects call-traffic data, formats management reports, and provides an administrative interface to the ACD feature in the switch.

Types of Installation

There are several ways of installing the *CentreVu* Supervisor software. This manual discusses the following methods:

- Local installation. With this type of installation, all of the Supervisor software is installed locally on each PC from a CD-ROM or from a network server. When installing from the network, the network administrator first copies the Supervisor installation files to a shared **installation** folder that resides on the network. Then, the user runs a client setup from the installation folder to install Supervisor to disk space local to the PC. See Chapter 2, “Installing *CentreVu* Supervisor on a Local PC,” for details.
- Shared network installation. With this type of installation, the *CentreVu* Supervisor application software is installed to a shared **application** folder on the network server, but user-specific files and logs are stored in a Supervisor folder on each user’s PC or on their own network drive. See Chapter 3, “Installing *CentreVu* Supervisor on a Shared Network Drive,” for details.

Checking Package Contents

The *CentreVu* Supervisor software package includes the items listed in Table 1. Check the package contents to be sure all items are included.

Table 1: *CentreVu* Supervisor Package Contents

Item	Description
CentreVu Supervisor Software	CD-ROM
CentreVu® *Supervisor Installation and Getting Started* document	Document Number (585-210-928)

If any of the items are missing or damaged, contact your Lucent Account Team. International customers should contact their Lucent representative or distributor.

Installation Support

If you have difficulty installing *CentreVu* Supervisor, refer to the following sources:

- System requirements in "What You Need on Your PC" on page 1-10.
- The online Help option provided with the installation program. (See "Online Help" on page 1-8.)
- The tips in the `readme.txt` file on the CD-ROM. Use an editor such as *Microsoft Windows* Notepad to read the file.
- The Install Status dialog box will display a list of all files installed for *CentreVu* Supervisor Release 8. Review this list to see that all files were successfully installed.
- Chapter 9, "Troubleshooting."

If you have further questions, contact the Lucent Technologies National Customer Care Center on 1-800-242-2121. For international support, call your Lucent representative or distributor for assistance.

Tips

The CD-ROM in your package includes a graphical installer to help you install your copy of *CentreVu* Supervisor.

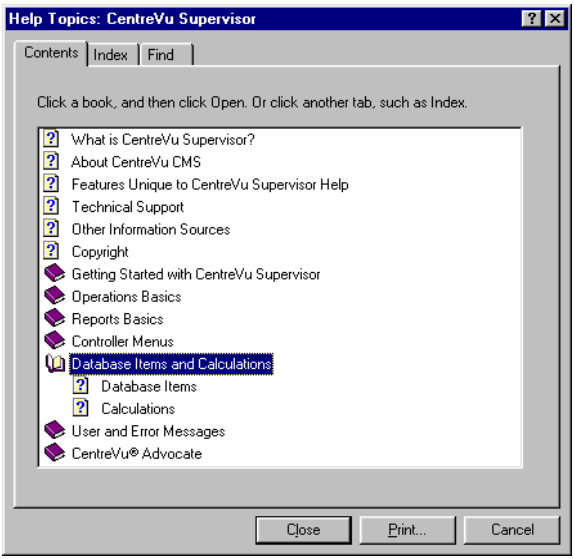
The CD-ROM also supports the *Microsoft Windows* AutoPlay feature. If AutoPlay is enabled on the PC, insert the CD-ROM into the drive and the *CentreVu* Supervisor Setup program starts automatically.

NOTE:
See your system administrator for information on how to enable or disable AutoPlay on your PC.

You can cancel the installation of *CentreVu* Supervisor at any time by selecting "Close" from the control menu, pressing Alt+F4, or pressing the F3 key. You can also cancel the installation by selecting the Cancel button at the bottom of the screen. The Supervisor installation program will exit installation and remove any files that were built by the program.

Online Help

CentreVu Supervisor provides online Help to assist you in installing and using Supervisor. This Help is divided into main categories (books), as shown on the Help Contents tab shown below:



Help Topics

Topics are the basic unit of a help project. Each Help book listed above contains a list of topics. Double-click on the book name to list the related topics, which are represented by a question mark, as shown above under Local Computer Installation.

Learning to Use Help

You can get information from Supervisor Help in a number of ways. The method you use often depends on the type of information you are searching for. The following methods of accessing Help are available:

- Help Contents: Displayed by clicking on the **Help** menu from the Supervisor Controller Window and selecting **Contents**.
- Help on open windows: With a window open, you can press the F1 key to get help on that window.
- Help on a specific topic: Choosing the **Find** tab from the **Help Topics** dialog box displays a window in which you can search for topics that contain a specific term or phrase.
- What's This Help: With a dialog box open that displays the icon in the title bar, help topics are available for each area or individual item in the dialog box. Click the icon, followed by the item or area on which you want help. You can also right-click certain items and select "What's This?"

The Supervisor Help system provides several other features such as bookmarks for marking topics you refer to frequently. For more information on using Help, see your *Windows* documentation.

What You Need on Your PC

To install and run *CentreVu* Supervisor, you need the following **recommended** configuration:

- A *Pentium** 133 MHz processor.

  NOTE:

  The minimum supported PC configuration is an *Intel* 486-compatible 66 MHz processor. If you have this configuration, expect to experience slower response time.

- A hard disk drive with 50 MB of free space. If you are installing Supervisor in more than one language, you will need an additional 5 MB of disk space for each language installed.
- A CD-ROM drive.
- Minimum of 32 MB RAM. If simultaneous Supervisor instances are running in the background, additional memory may be required to maintain acceptable performance.
- An SVGA monitor and adapter set to at least 800x600x256 colors graphics resolution.
- *Microsoft Windows* 95 or 98 or *Windows NT* 4.0 operating system with Service Pack 4.

  NOTE:

  If you are installing Supervisor on a *Windows NT* 4.0 operating system, you must first install the *Microsoft* Service Pack 4 or later version.
- A mouse compatible with the supported *Windows* operating systems.
- For Network Connection
  - — WinSock 1.1 compliant TCP/IP stack
  - — Ethernet communications board.

* Pentium is a registered trademark of Intel Corporation.

- For Serial Connection
  - — Serial cable correctly wired to support hardware flow control and a 16550A UART communications port
  - — Available COM port.
- For Modem Connection—at least a 19.2 Kbps modem and a 16550A UART communications port. If the modem is external, then the cable must be correctly wired to support hardware flow control.

Other Requirements

If you are upgrading from Supervisor 1.0 or 5.0 and you are running *Windows* 3.1, *Windows for Workgroups* 3.11, or *Windows NT* 3.51, you must upgrade your PC operating system to *Microsoft Windows 95* or *98* or *Windows NT* 4.0 before you can install *CentreVu* Supervisor R8.

If you are installing Supervisor on a *Windows* 95 or *98* operating system that does not have Internet Explorer 4.0, you need to install Dcom95 before installing *CentreVu* Supervisor. To install Dcom95, run the `dcom95.exe` program located in the Dcom95 folder on your *CentreVu* Supervisor CD-ROM, or in the Supervisor folder on the network server. Dcom95 requires you to reboot your PC, so you need to close any open applications before running it.

If you are running *Windows* NT 4.0 and do not have Service Pack 4 installed, you must install it before installing *CentreVu* Supervisor.

If you have *Windows NT* 4.0 with no Service Pack, Service Pack 1 or Service Pack 2, you will need to install Service Pack 3 first, then Service Pack 4. If you have *Windows NT* 4.0 with Service Pack 3, you will need to upgrade to Service Pack 4.

What You Need for Your *CentreVu* CMS Server

To install and run *CentreVu* Supervisor, you need the following:

- *Sun*[*] *SPARCserver*[†] computer
- *CentreVu* Call Management System Release 3 Version 8 or Version 6 (*CentreVu* CMS R3V8 or R3V6).

NOTE:

If you are upgrading from Supervisor 1.0 or 5.0, you must upgrade your CMS server before you upgrade Supervisor. When logging into *CentreVu* CMS, you must have both Supervisor Version 8 and *CentreVu* CMS R3V8 or R3V6 or the login will fail, and an error message will appear. *CentreVu* Supervisor R8 will run with *CentreVu* CMS R3V6. You will be given the option to choose a version of CMS to use when logging into *CentreVu* Supervisor.

*Sun is a registered trademark of Sun Microsystems, Inc.
†SPARCserver is a registered trademark of SPARC International licensed exclusively to Sun Microsystems.

CMS System Capacities

The CMS system capacities are unchanged by the Supervisor software. If you are putting your *CentreVu* Supervisor users on a LAN, then your network must support the additional network traffic.

Number of Supervisor Windows Allowed

Supervisor allows users to open as many as 12 windows simultaneously. This limit is set for each user by the CMS system administrator. Windows that do not directly use CMS data, such as the color customization data, are not included in this limit. Windows that have been opened for other applications also are not included in this limit.

The Supervisor application can connect to a single CMS. Supervisor does not provide the capability to combine data from more than one CMS.

Number of Simultaneous Instances Allowed

With the **recommended** configuration listed in "What You Need on Your PC" on page 1-10, you can run as many as four simultaneous Supervisor instances. With an *Intel* 486-compatible processor, you are limited to one instance of Supervisor with one report.

With *Windows* 95, you are limited to one instance of Supervisor with six reports running or four instances of Supervisor with one report each.

The ability to launch several instances and their performance depends upon the memory and speed of the PC, and the other applications active on the PC. If simultaneous Supervisor instances are running in the background, additional memory may be required to maintain acceptable performance.

Number of PCs Allowed to Run Supervisor

The number of PCs running *CentreVu* Supervisor is limited by the number of simultaneous users contracted for in the site-licensing agreement with Lucent. The CMS software will count the number of active *CentreVu* Supervisor clients that are logged in, and limit the number of simultaneous users to the number purchased by the customer.

A client may be logged into a CMS server once per user ID on a single PC.

Performance

When you are using Supervisor you may experience slightly slower response times for some actions. This could be for a variety of reasons. The following are a few possible reasons for slower performance:

- The PC's configuration, processor speed, Level 2 cache, hard disk speed, and video RAM could affect the response time.
- If the Supervisor application is running simultaneously with other applications, performance of the Supervisor application could be affected by those other applications.
- Two or more Supervisor instances running simultaneously could result in slightly slower than user response time.
- If Supervisor is running in a LAN environment, Supervisor will generate additional network traffic. For example, if 250 Supervisor instances were running two real-time reports each, then Supervisor could require approximately 20% of the LAN's capacity. Therefore, ensure that your LAN has been engineered appropriately.
- In a LAN environment, network backups could cause congestion on the network, adversely affecting its performance.

Reliability/Availability

If serial links or LAN connectivity drop, the Supervisor application will automatically attempt to restore the connection if you logged in using the Automatic Login capability.

Security

When Supervisor is connected to CMS, the same level of security is afforded to you as with a dedicated CMS terminal. The existing CMS permissions structure will be honored. When you are using Supervisor on a LAN, you will be able to access only the information that is available in a direct-connect environment.

CentreVu
Supervisor

Installing *CentreVu* Supervisor on a Local PC

Overview

Local installation means that you install all of the files necessary to run *CentreVu*® Supervisor on disk space within a PC. You can perform this installation from either a CD-ROM or on a network server.

If you are installing Supervisor from the network, you must first copy the Supervisor installation files from the CD-ROM onto the network. Then you install Supervisor onto each client PC from the network.

You must have administrator privileges to install Supervisor on a PC running *Windows NT** 4.0.

This chapter includes the following sections:

- Installation Procedures
- Preparing the Network Folder
- Setting Up the PC.

*Windows NT is a trademark of Microsoft Corp.

Installation Procedures

Use these procedures to install *CentreVu* Supervisor on a PC that will run the application from a local disk drive. If you are installing Supervisor on each PC using the network, start with the "Preparing the Network Folder" section below. If you are installing Supervisor on each PC using the CD-ROM, go to "Setting Up the PC" on page 2-3.

NOTE:
For installation requirements, see "Other Requirements" on page 1-11.

Preparing the Network Folder

Installing *CentreVu* Supervisor over a network is a two-step process that consists of preparing the installation folder and then installing Supervisor on each PC.

To prepare the network folder, do the following:

1. At a PC that is connected to the network, insert the *CentreVu* Supervisor CD-ROM into the CD-ROM drive.
2. If AutoPlay is enabled on the PC, the *CentreVu* Supervisor Setup program will start automatically after you insert the CD-ROM into the drive. Choose the **Cancel** button in the dialog box that displays, and then continue with Step 3.

   NOTE:

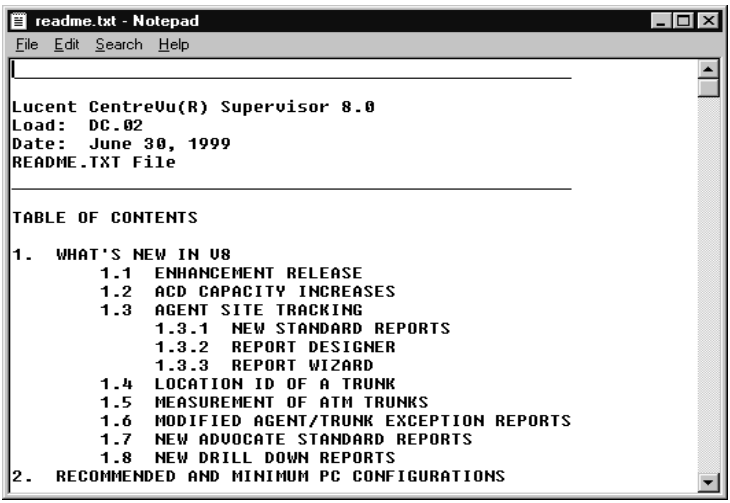
   See your system administrator for information on how to enable or disable AutoPlay on your PC.
3. Open *Windows* Explorer.
4. Create a folder on the network drive, and record the path to the folder for later use.
5. Using the Copy command or drag-and-drop, copy the contents of the CD-ROM to the folder you created in Step 4. Be sure to copy all of the files.

6. Verify that the network drive where you copied the contents of the distribution medium is available to each PC that will be installing Supervisor from the network.
7. Go to "Setting Up the PC" below.

Setting Up the PC

1. Before starting the installation, close all running programs on the PC.
2. On the Supervisor distribution medium (CD-ROM or installation folder), locate and double-click on the `Readme.txt` file to view last minute installation tips on *CentreVu* Supervisor.

   The file will be displayed in *Windows* Notepad, as shown below:

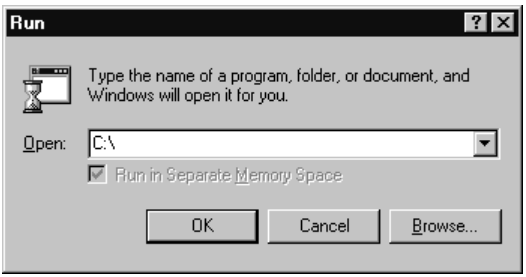


3. To exit the readme file, close the Notepad application.
4. To begin the installation, select the appropriate following step:
   a. If installing from CD-ROM and AutoPlay is enabled, insert the CD go to Step 10.

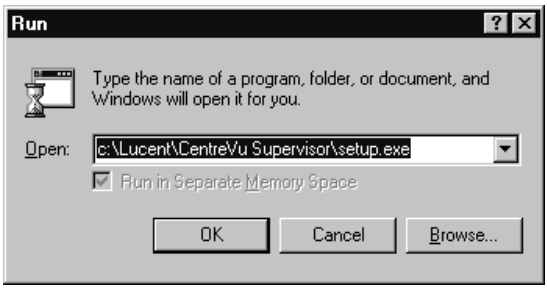
b. If installing from CD-ROM and AutoPlay is not enabled, follow Steps 5 and 6, insert the CD and then proceed with Step 10.

c. If installing from the network, go to Step 5, and then proceed with Step 7.

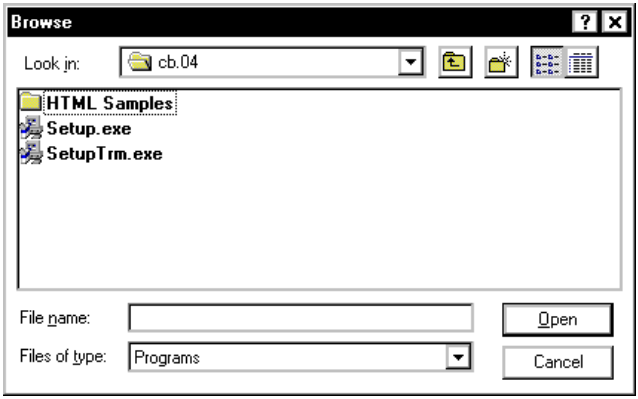
5. Click Start on the taskbar and select Run. The Run dialog box appears.



6. In the **Open** text box, enter the drive from which you are installing *CentreVu* Supervisor, followed by `setup`, and then select **OK**. In the following example, the "c:" drive is selected.



7. In the Run dialog box, select the **Browse** button. The Browse dialog box appears.



8. In the Browse dialog box, navigate to the drive and directory containing the *CentreVu* Supervisor files.

NOTE:

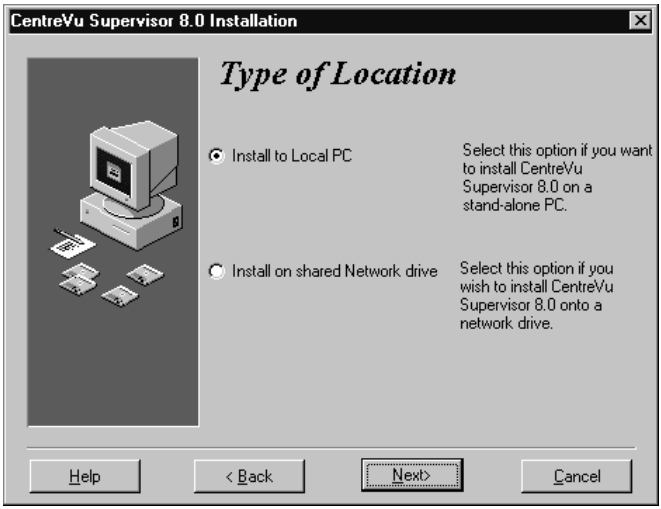
If the drive containing the Supervisor installation files is not mapped to the PC, you need to map a drive letter to where Supervisor has been installed on your network. To do this, open *Windows* Explorer and select **Map Network Drive** from the **Tools** drop-down menu. Select any available drive letter and enter the appropriate description in the path field; for example, \my_server\folder_name.

9. Locate and double-click on the `Setup.exe` file to begin the installation.

10. After a short wait, the CentreVu Supervisor 8.0 Installation *Welcome* window appears.

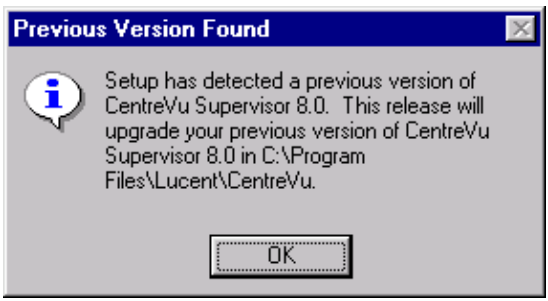
11. Select **Next**. Setup begins searching for a previous installation of Supervisor on your PC.

12. The Type of Location dialog box appears.

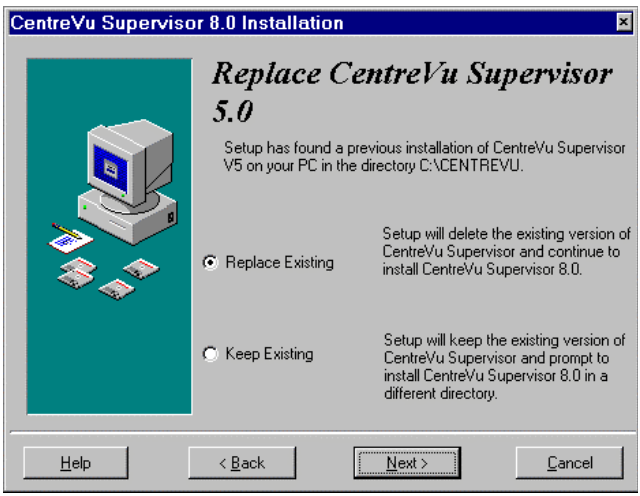


13. Select **Install to Local PC** to install *CentreVu* Supervisor to a stand-alone client PC or on the client's own Local Area Network (LAN) drive.

14. If the setup program finds a previous installation of Supervisor Version 8 or Version 6, the Previous Version Found dialog box appears. Click **OK** to continue with the installation.



15. Select **Next**. Then select one of the following, depending on which dialog appears:
    - If the Replace CentreVu Supervisor 5.0 dialog box appears, it means that the setup program did not find a previous installation of Supervisor Version 8 or Version 6, but it found an installation of Supervisor Version 5. Go to Step 16.
    - If the Replace CentreVu Supervisor 1.0 dialog box appears, it means that the setup program did not find a previous installation of Supervisor Version 8 or Version 6, but it found an installation of Supervisor Version 1. Go to Step 19. (Either Supervisor Version 5 or Version 1 could exist, but not both.)
    - If the Select Location dialog box appears, it means that the setup program did not find any previous installation of Supervisor. Go to Step 22.
16. The Replace CentreVu Supervisor 5.0 dialog box appears.



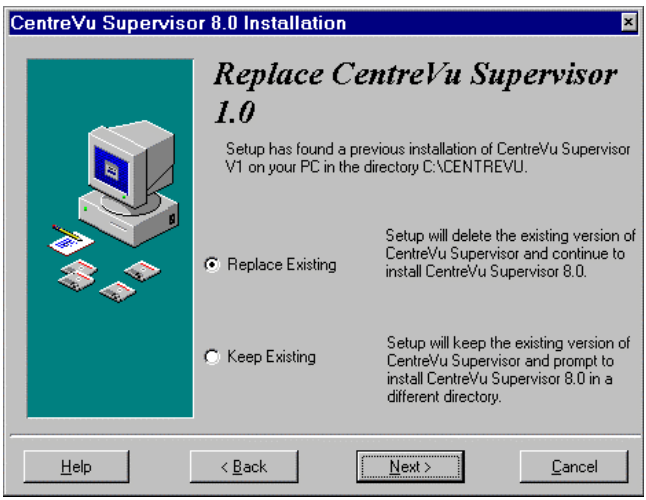
17. Select one of the following:
    - **Replace Existing**—the setup program will delete the existing installation of Supervisor Version 5 and install Supervisor Version 8 in its place.

- **Keep Existing**—the setup program will keep the existing installation of Supervisor and prompt to install Supervisor Version 8 in a different folder.

NOTE:

If you decide to keep the previous installation of Supervisor Version 5, you can uninstall it later using the uninstall executable file on the Supervisor CD-ROM. This file is named `removeV5.exe`.

18. Select **Next**.
19. The Replace CentreVu Supervisor 1.0 dialog box appears.

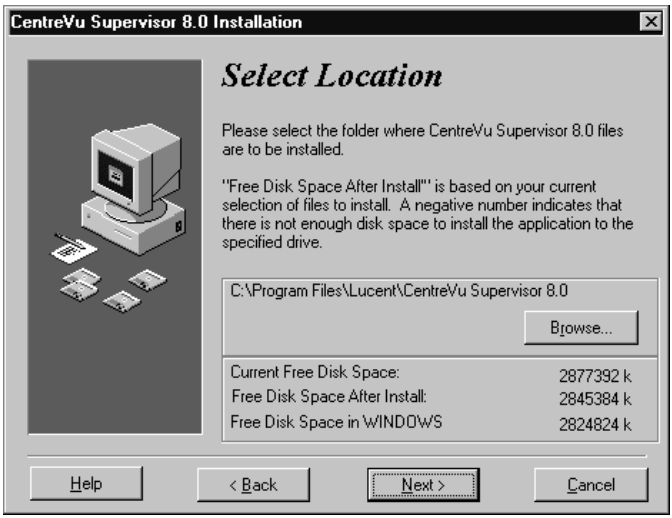


20. Select one of the following:
    - **Replace Existing**—the setup program will delete the existing installation of Supervisor Version 1 and install Supervisor Version 8 in its place.
    - **Keep Existing**—the setup program will keep the existing installation of Supervisor and prompt to install Supervisor Version 8 in a different folder.

NOTE:

If you decide to keep the previous installation of Supervisor Version 1, you can uninstall it later using the uninstall executable file on the Supervisor CD-ROM. This file is named `removeV1.exe`.

21. Select **Next**.
22. The Select Location dialog box appears. If you are replacing the existing version of Supervisor, the Browse button will be disabled.



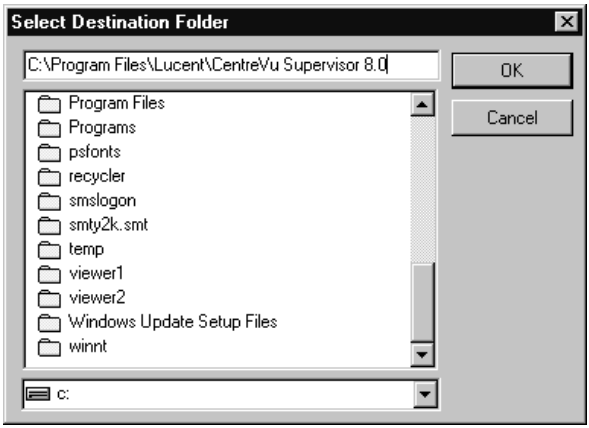
23. Assure that you have enough disk space to install the application to the specified drive.

NOTE:

The information on the bottom of the dialog box indicates the Current Free Disk Space and the Free Disk Space After Install.

24. Choose one of the following:
    - If you want to install the Supervisor files in the default installation path displayed, go to Step 28.
    - If you want to install the *CentreVu* Supervisor files in a different drive or folder, go to Step 25.

25. Use the **Browse** option to display the Select Destination Directory dialog box.



26. In the Select Destination Folder dialog box, do one of the following:
    - Navigate to the drive and folder where you want to install the files. Double click on the folder to select it.
    - Type the drive and folder where you want to install the files. If the folder does not exist, the Setup program creates it.
27. When you have selected the location, click **OK**. The destination path you chose displays in the Select Location dialog box.

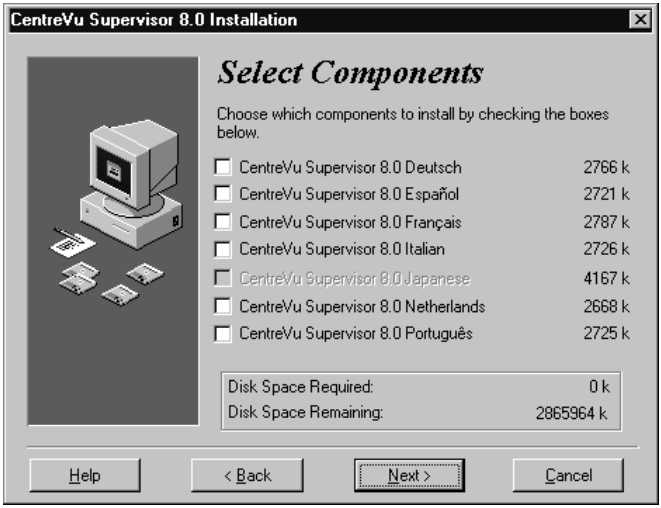
28. Select **Next**. The Type of Install dialog box appears.

29. In the Type of Install dialog box, select one of the following:
    - **Typical**—this selection installs all of the basic options in English, which is required, and all of the basic options in the language of your *Windows* operating system. Go to Step 33.
    - **Custom**—this selection lets you choose which options and language versions to install. Go to Step 30.

NOTE:

If you are doing a Supervisor Version 8 upgrade, you must also install all of the required languages. The Supervisor upgrade will not automatically reinstall the required languages.

30. If you selected **Custom**, the Select Components dialog box appears. This dialog box lets you select or deselect the components and language versions you want to install.

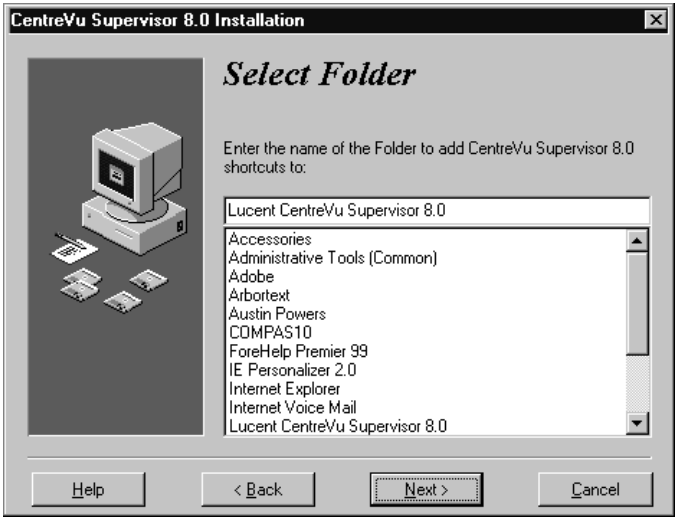


31. Before making your selections, read the bottom half of the dialog box. It provides you with the following information:
    - The total space required to install the options you selected
    - The total space available on the specified drive (both the destination drive and the drive on which *Windows* exists).
32. Place a check mark in front of the components in the list box that you want to install.

NOTE:

The English versions of Supervisor and on-line help are always installed. If you are running a supported non-English version of *Windows*, Setup will also install Supervisor and on-line help in the language that matches your *Windows* System. See page 1-2 for a table showing supported versions.

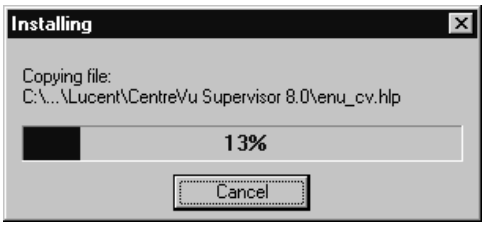
33. Select **Next**. The Select Folder dialog box appears.



34. The Select Folder dialog box lets you select a folder in which to put *CentreVu* Supervisor shortcuts. Do one of the following:
    - Choose the default folder displayed.
    - Enter a different folder name in the text box. The Supervisor setup program creates the folder.
    - Select a folder name from the list of existing groups.
35. Select **Next**.

The Ready to Install dialog box appears.

36. Select **Install** to begin the installation. A progress indicator shows what percentage of the files are being installed.



The Install Status dialog box will display a list of all files installed for *CentreVu* Supervisor Release 8. Review this list as needed to see that all files were successfully installed.

When the installation is complete, the Install Successful dialog box appears.

37. Select **Finish** to return to your desktop.
38. *CentreVu* Supervisor installation is complete.

CentreVu Supervisor

Installing *CentreVu* Supervisor on a Shared Network Drive

Overview

This chapter explains how to install the *CentreVu*® Supervisor application software for use in a shared application folder configuration on the network drive. With this type of installation, the Supervisor executable files reside on the application server and are shared by multiple computers.

You must have administrator privileges to install Supervisor on a PC running *Windows NT** 4.0.

You must first do a network setup to install Supervisor onto the network. Then, from each client workstation, you do a client setup to allow users to access Supervisor from their workstations.

This chapter includes the following sections:

- Installation Procedures
- Network Setup
- Client Setup.

*Windows NT is a trademark of Microsoft Corp.

Installation Procedures

Installing *CentreVu* Supervisor to a shared application folder is a two-step process that consists of the following:

- Performing the network setup
- Performing a client setup at each client PC.

The network setup expands all program files and all language options into the network directory. In addition, this setup transfers a client setup program and its associated files to the network directory. You can do this setup from either the network installation folder or from a CD-ROM.

The client setup program allows clients to access Supervisor from the network server. Client setup creates a folder on the client PC. The icons in the folder point to the executable files on the application server. In addition, client setup allows you to identify where you want to put the user-specific files (these files can be located on the client's local drive or on the network).

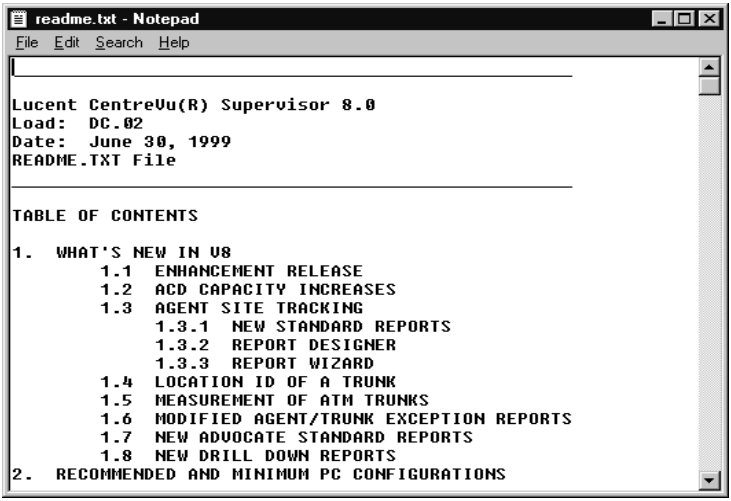
NOTE:
For installation requirements, see "Other Requirements" on page 1-11.

Network Setup

To perform a network setup, you must have administrative privileges on a workstation that is running *Windows*. Then do the following:

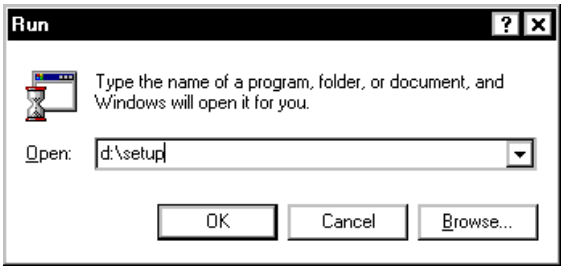
1. Log on to the PC as a user with administrative privileges.
2. Before starting the installation, close all running programs on the PC.
3. Create a folder on the network drive to hold the Supervisor application files, and make it read-only and shared.
4. Verify that the network drive containing the application folder is connected to each client PC.
5. On the Supervisor distribution medium (CD-ROM or installation folder), locate and double-click on the `Readme.txt` file to view last minute installation tips on *CentreVu* Supervisor.

The file will be displayed in *Windows* Notepad, as shown below:



6. To exit the readme file, close the Notepad application**.**
7. Insert the *CentreVu* Supervisor CD-ROM into the CD-ROM drive. One of the following will occur:
   - If AutoPlay is enabled, setup starts automatically when you insert the CD-ROM. Go to Step 10.
   - If AutoPlay is not enabled, proceed with Step 8.
8. Choose **Run** from the **Start** menu. The Run dialog box appears.

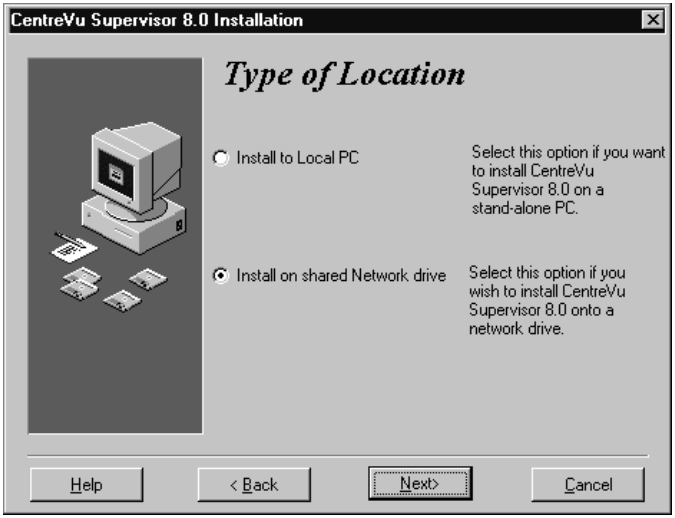
9. In the **Open** text box, enter your CD-ROM drive, followed by `setup`, and then select **OK**. In the following example, the "d:" drive is selected.



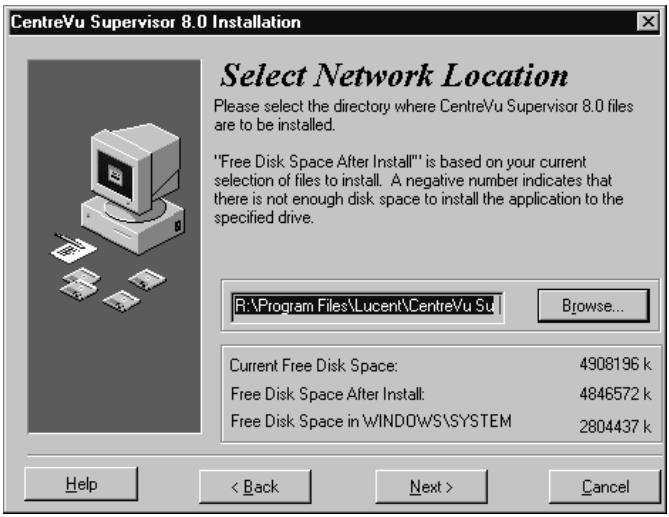
NOTE:
You can also install Supervisor from an installation folder on the network drive. If the drive containing the Supervisor installation files is not mapped to your PC, you need to type the network path in the **Open** text box of the Run dialog box to map it to your PC.

10. After a short wait, the CentreVu Supervisor 8.0 Installation *Welcome* window appears.

11. Select **Next**. The Type of Location dialog box appears.

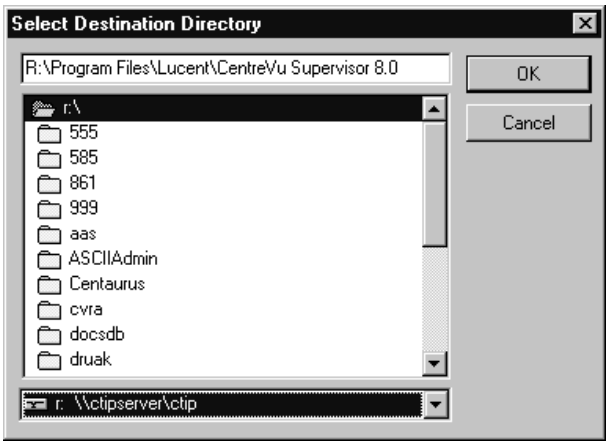


12. Select **Install on Shared Network Drive** to install the *CentreVu* Supervisor application files to a folder on a shared network server.
13. Select **Next**. The Select Network Location dialog box appears.



The setup program expands all program files and all language versions into the network directory specified in the Select Network Location dialog box.

14. Check the Current Free Disk Space and the Free Disk Space After Install to assure that you have enough disk space to install the application to the specified drive.
15. Choose one of the following:
    - If you want to install the Supervisor files in the default installation path displayed, go to Step 19.
    - If you want to install the *CentreVu* Supervisor files in a different drive or folder, go to Step 16.
16. In the Select Network Location dialog box, use the **Browse** option to display the Select Destination Folder dialog box.

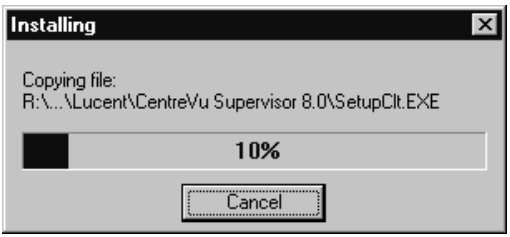


17. Navigate to the drive containing the folder you created in Step 3, and double-click on the folder to select it.

NOTE:
If performing a Supervisor upgrade, the upgrade must be installed in the same folder containing the previous Supervisor Version 8 software. It is the system administrator's responsibility to make sure that the client's PC is mapped to the network drive and folder containing the Supervisor Version 8 software.

18. Select **OK.** The drive and folder where Supervisor will be installed appears in the Select Network Location dialog box.
19. Select **Next**. The Ready to Install dialog box appears.

20. Select **Install** to begin the installation. A progress indicator shows what percentage of the files have been installed.



When the installation is complete, the Install Successful dialog box appears.

21. Select **Finish** to return to your desktop.
22. *CentreVu* Supervisor installation is complete. Go to Chapter 5, “Getting Started with CentreVu Supervisor,” to learn how to establish a connection to the *CentreVu* CMS server.

NOTE:
You may get a message that you need to restart your computer before running Supervisor. Press **OK** to restart your computer.

Client Setup

The client setup program sets up the client computer to access *CentreVu* Supervisor from the network server. Supervisor setup installs the application files on the network, while client setup installs on the client PC only the user-specific files needed to run Supervisor.

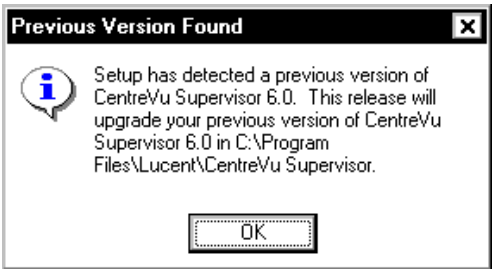
NOTE:
You must run client setup from the physical PC that the client will use to access Supervisor. If you simply log into the network as each user and then run client setup, the program will not install properly.

To set up a client PC, do the following:

1. Before starting the installation, close all running programs on the PC.
2. In *Windows* Explorer or Network Neighborhood *(Windows* 95 or *98* or *Windows NT* 4.0), navigate to the directory where *CentreVu* Supervisor is installed.
3. Locate and then double-click on the `setupclt.exe` file.
4. After a short wait, the CentreVu Supervisor 8.0 Installation *Welcome* window appears.

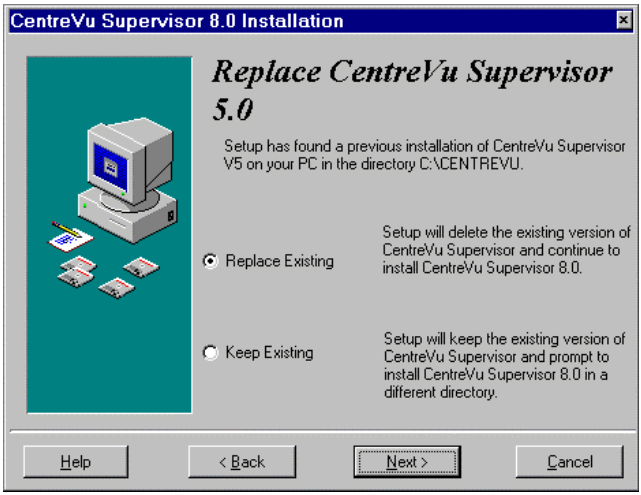
5. Select **Next**. Setup begins searching for a previous installation of Supervisor on your PC.

6. If the setup program finds a previous installation of Supervisor Version 6 or Version 8, the Previous Version Found dialog box appears. Select **OK** to continue with the installation.



7. If the setup program did not find a previous installation of Supervisor Version 8, one of the following dialog boxes appears:
   - If the Replace CentreVu Supervisor 5.0 dialog box appears, it means that the setup program did not find a previous installation of Supervisor Version 8, but it found an installation of Supervisor Version 5. Go to Step 8.
   - If the Replace CentreVu Supervisor 1.0 dialog box appears, it means that the setup program did not find a previous installation of Supervisor Version 8 or Version 6, but it found an installation of Supervisor Version 1. Go to Step 11. (Either Supervisor Version 5 or Version 1 could exist, but not both.)
   - If the Select Location dialog box appears, it means that the setup program did not find an installation of Supervisor Version 5. Go to Step 14.

8. The Replace CentreVu Supervisor 5.0 dialog box appears.



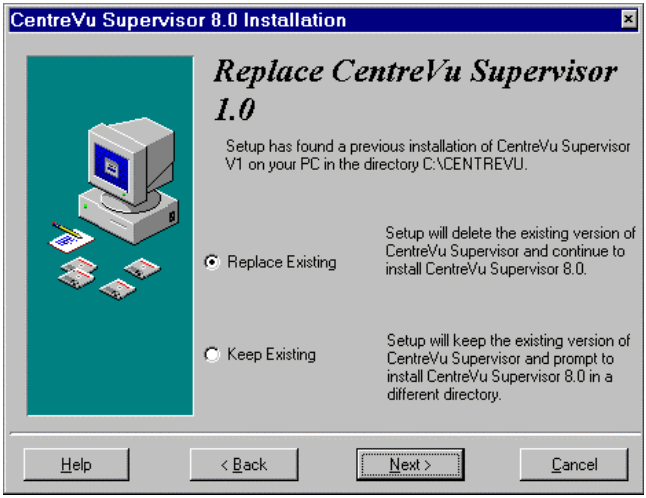
9. Select one of the following:

   - **Replace Existing**—the setup program will delete the existing installation of Supervisor Version 5 and install Supervisor Version 8 in its place.
   - **Keep Existing**—the setup program will keep the existing installation of Supervisor and prompt to install Supervisor Version 8 in a different folder.

   NOTE:
   If you decide to keep the previous installation of Supervisor Version 5, you can uninstall it later using the uninstall executable file on the Supervisor CD-ROM. This file is named `removeV5.exe`.

10. Select **Next**.

11. The Replace CentreVu Supervisor 1.0 dialog box appears.



12. Select one of the following:
    - **Replace Existing**—the setup program will delete the existing installation of Supervisor Version 1 and install Supervisor Version 8 in its place.
    - **Keep Existing**—the setup program will keep the existing installation of Supervisor and prompt to install Supervisor Version 8 in a different folder.

    NOTE:
    If you decide to keep the previous installation of Supervisor Version 1, you can uninstall it later using the uninstall executable file on the Supervisor CD-ROM. This file is named `removeV1.exe`.

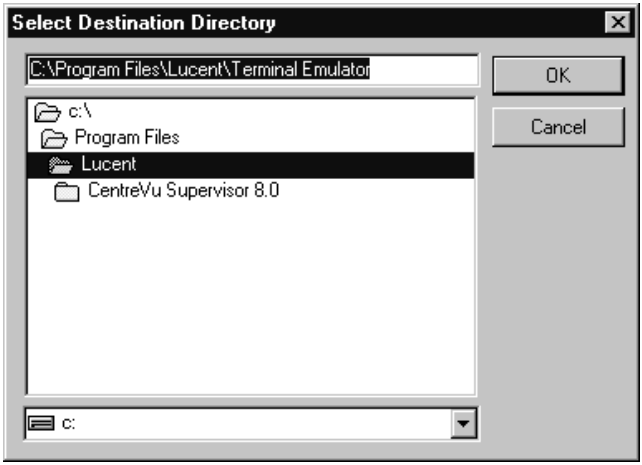
13. Select **Next**.

14. The Select Destination Directory dialog box appears. If you are replacing the existing version of Supervisor, the Browse button will be disabled.

NOTE:
The Select Destination Directory dialog box lets you choose where you want to install user-specific files. If a previous user file location is not detected, the default location is c:\Lucent\CentreVu\Supervisor. If a previous user file location is detected, the client setup displays the user file path that was used for the previous installation.

15. Choose one of the following:
    - If you want to install the Supervisor files in the default installation path displayed, go to Step 19.
    - If you want to install the Supervisor files in a different drive or folder, go to Step 16.

16. Use the Browse option to display the Select Destination Folder dialog box.

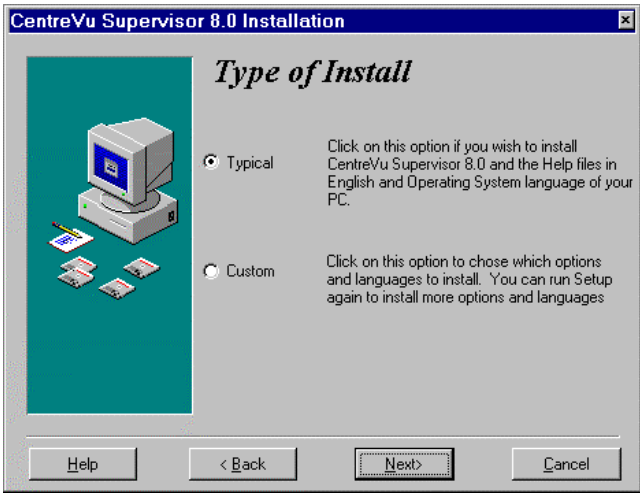


17. In the Select Destination Folder dialog box, do one of the following:
    - Navigate to the drive and folder where you want to install the files. Double click on the folder to select it.
    - Type the drive and folder where you want to install the files. If the folder does not exist, the Setup program creates it.

    NOTE:
    The user files can be located on the client's local drive or on the network.

18. When you have selected the location, click **OK**. The destination path you chose displays in the Select Location dialog box.

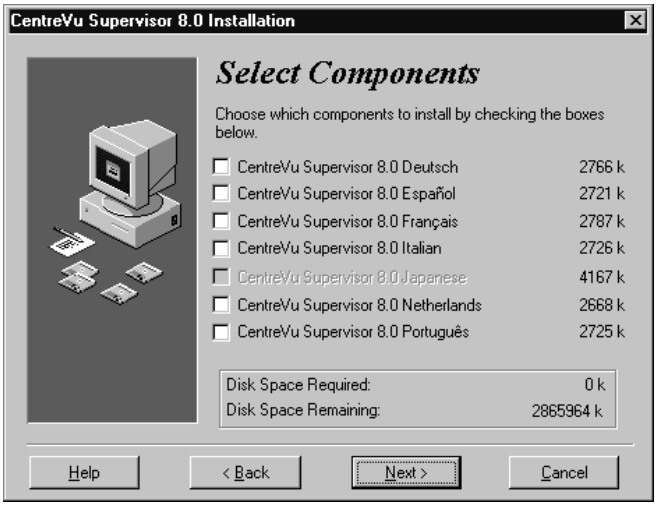
19. Select **Next**. The Type of Install dialog box appears.



20. In the Type of Install dialog box, select one of the following:
    - **Typical**—this selection installs all of the basic options in English, which is required, as well as all of the basic options in the language of your *Windows* operating system. Go to Step 23.
    - **Custom**—this selection lets you choose which options and language versions to install. Go to Step 21.

NOTE:
If you are doing a Supervisor Version 8 upgrade, you must also install all of the required languages. The Supervisor upgrade will not automatically reinstall the required languages.

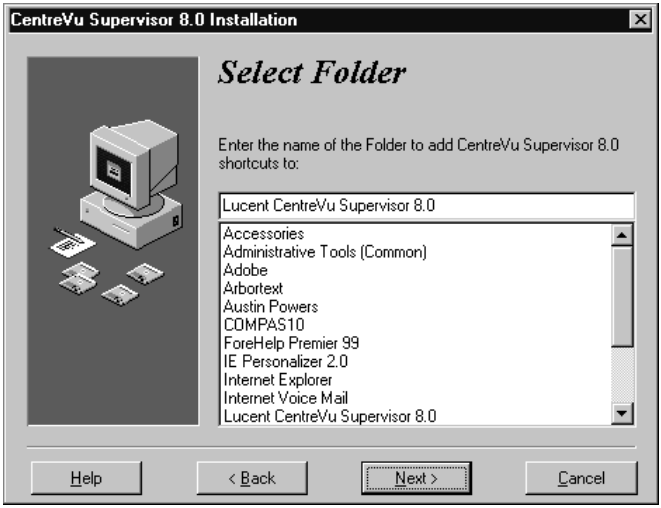
21. If you selected **Custom**, the Select Components dialog box appears. This dialog box lets you select or deselect the components and language versions you want to install.



22. Place a check mark in front of the components in the list box that you want to install.

NOTE:
The English versions of Supervisor and on-line help are always installed. If you are running a supported non-English version of *Windows*, Setup will also install Supervisor and on-line help in the language that matches your *Windows* System. See page 1-2 for a table listing supported versions.

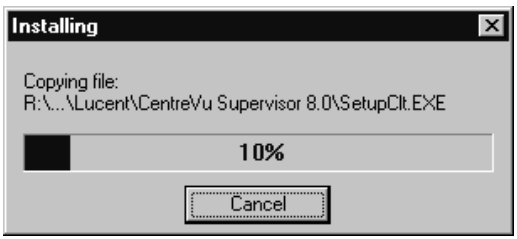
23. Select **Next**. The Select Folder dialog box appears.



24. The Select Folder dialog box lets you select a folder in which to put *CentreVu* Supervisor shortcuts. Do one of the following:
    - Choose the default folder displayed.
    - Enter a different folder name in the text box. The Supervisor setup program creates the folder.
    - Select a folder name by from the list of existing groups.

25. Select **Next**. The Ready to Install dialog box appears.

26. Select **Install** to begin the setup. A progress indicator shows what percentage of the files are being installed.



The Install Status dialog box will display a list of all files installed for *CentreVu* Supervisor Release 8. Review this list as needed to see that all files were successfully installed.

When the installation is complete, the Install Successful dialog box appears.

27. Select **Finish** to return to your desktop.
28. *CentreVu* Supervisor installation is complete. Go to Chapter 5, “Getting Started with CentreVu Supervisor,” to learn how to establish a connection to the *CentreVu* CMS server.

NOTE:
You may get a message that you need to restart your computer before running Supervisor. Press **OK** to restart your computer.

CentreVu
Supervisor

Uninstalling *CentreVu* Supervisor

Overview

You can easily uninstall the *CentreVu*® Supervisor Version 8 application using the *Microsoft Windows** Add/Remove Programs wizard. Uninstall removes the Supervisor files and folders from the PC. Uninstall will not remove components, registry entries, files that are being used by other applications, or a folder that is not empty.

NOTE:
A registry is a *Windows* database that holds information about the system and its applications, including system settings, client, and server information.

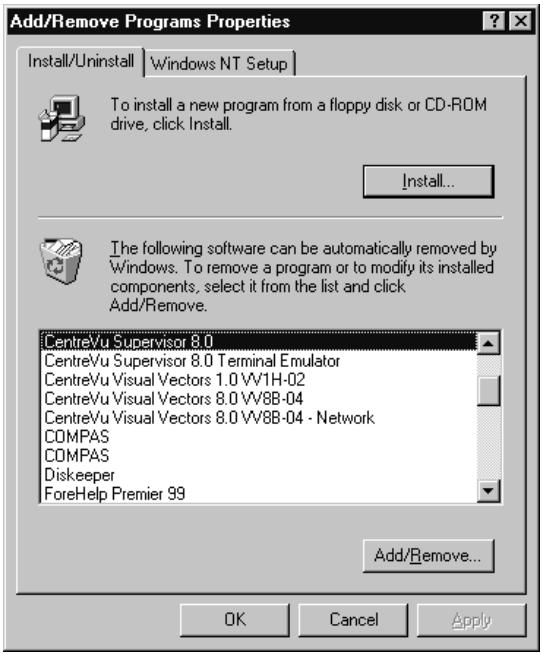
This chapter explains how to perform a *CentreVu* Supervisor Version 8 uninstall.

*Microsoft Windows is a trademark of Microsoft Corp.

Performing the Uninstall

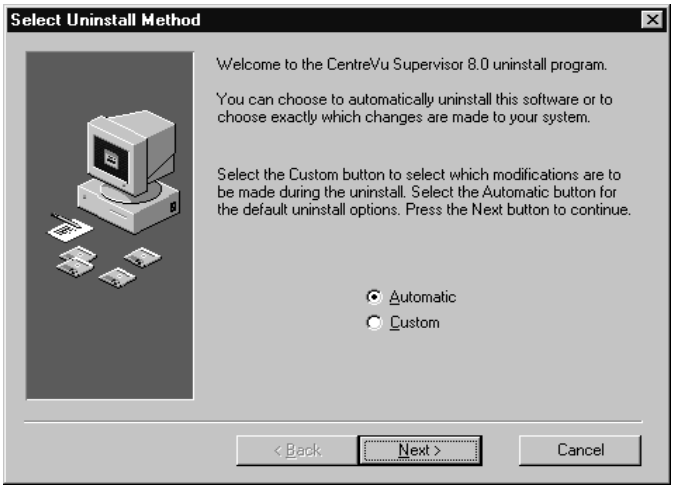
To uninstall the *CentreVu* Supervisor application, do the following*:*

1. Close all running programs on the PC.
2. Select **Settings** and then **Control Panel** in the *Windows* **Start** menu.
3. Double click on the **Add/Remove Programs** icon. The Add/Remove Programs Properties window opens.

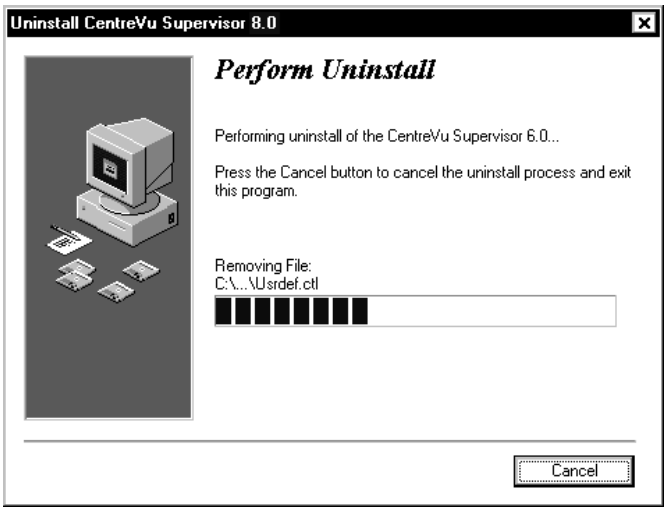


4. Select the **Install/Uninstall** tab.
5. Highlight Lucent *CentreVu* Supervisor 8.0 in the list of installed software.

6. Select the **Add/Remove** button. The following message displays:



7. Click **Next**. The Perform Uninstall window appears.



A progress indicator indicates the percentage of the files that are being removed.

NOTE:

If you press **Cancel** at this time, it will cancel the uninstall process, but because some files will have been deleted, Supervisor will not run. Also, if you try to uninstall Supervisor again after canceling the uninstall, you will not be able to do it.

8. After the uninstall is complete, you are returned to your desktop.

CentreVu Supervisor

Getting Started with *CentreVu* Supervisor

Overview

This section familiarizes you with the main components of the Supervisor Controller window and teaches you a few basic skills you will use every time you work with the application. You will learn how to do the following:

- Open the Supervisor application
- Log into the CMS server
- Log off the CMS server
- Get help.

You will also learn about the following components of Supervisor Controller:

- Menus
- Icons
- Status line
- Windows.

Establishing *CentreVu* CMS Server Connection Settings

You must establish connection settings in order to connect to the CMS server. If you have already established connection settings, go to the following sections:

- "Logging Into the CMS Server — First Time" on page 5-9
- "Logging Into CMS Server — After First Time" on page 5-10.

There are three connection options:

- Network
- Serial
- Modem.

You can set these options to connect to the CMS server one of two ways:

- Automatic—used to login to the CMS server directly from Supervisor
- Manual—used to login to the CMS server by way of the server's *Solaris** system. You would use manual login for the following reasons:
  - — You need to access `cmssvc` and `cmsadm` menus
  - — You are instructed to do so for troubleshooting purposes
  - — Your version of Supervisor resides in a different *Solaris* system than the CMS server.

  NOTE:

  For more information about your *Solaris* system, see your *Solaris* system administrator.

Now you are ready to open Supervisor and establish a connection to the CMS server. See "Opening the CentreVu Supervisor Application" on page 5-3.

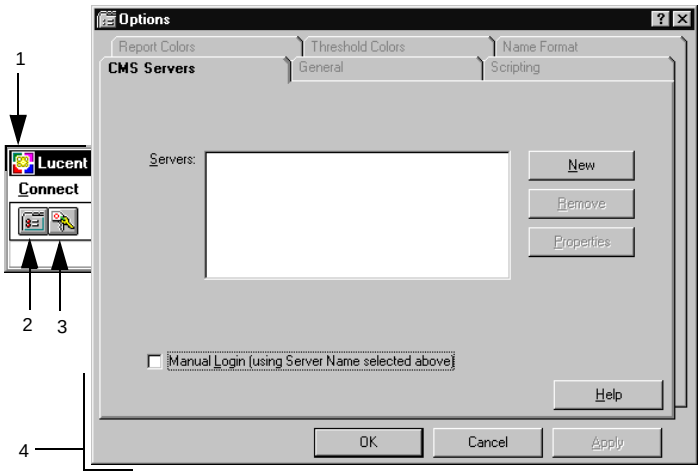
*Solaris is a registered trademark of Sun Microsystems.

Opening the *CentreVu* Supervisor Application

To open the Supervisor application, do the following:

1. Select **Programs** and then **Lucent CentreVu Supervisor 8.0** from the *Windows* Start menu.
2. In the **Lucent CentreVu Supervisor** menu, select **CentreVu Supervisor-English**.

   At this point, the Supervisor application is open, but you are not logged into the CMS server. If you have not yet established connection settings to a CMS server, the Supervisor Controller appears, along with an open Options dialog box, as shown below.

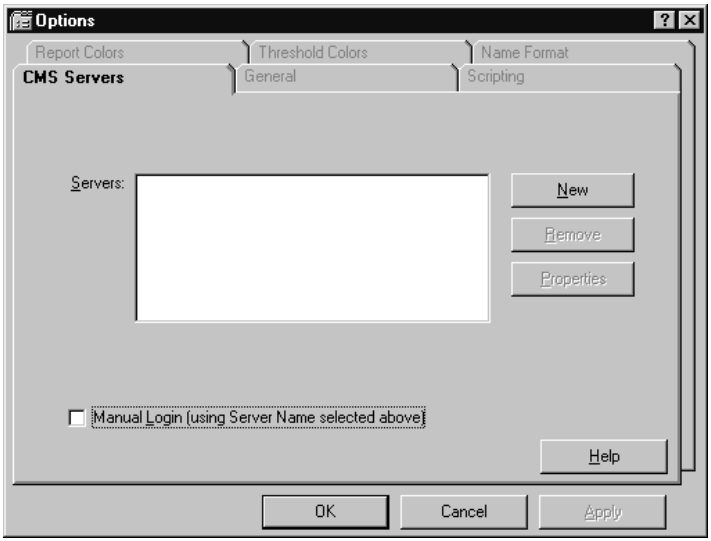


1. Supervisor Controller
2. **Options** icon
3. **Login** icon
4. Options window

3. Next, you need to establish connection settings. See “Establishing the Connection” on page 5-4.

Establishing the Connection

To establish connection settings to a CMS server, you must use the Options dialog box. The Options dialog box displays with the CMS Servers tab active (this is the only active tab).

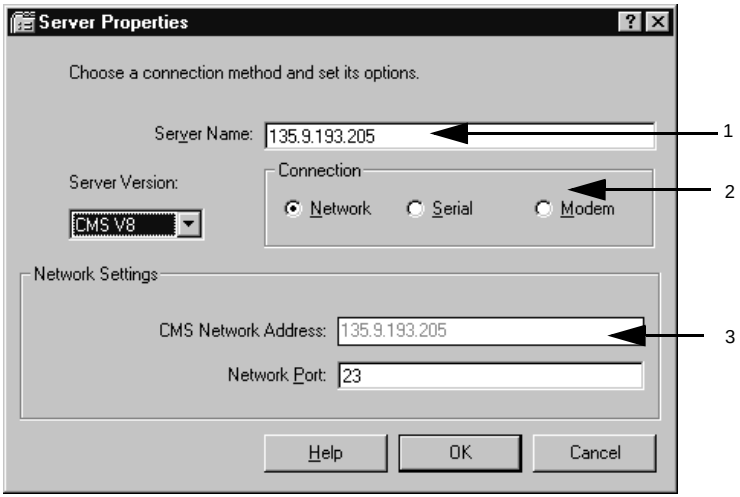


To establish a connection, do the following:

1. If you want to connect manually, select the **Manual Login** check box. If you want to connect automatically, do not select the **Manual Login** check box.
2. Since this is a new connection, select **New**. The Server Properties window appears.
3. Do one of the following:
   - If you are going to have a Network connection, continue with the "Network" section on page 5-5.
   - If you are going to have a Serial connection, continue with the "Serial" section on page 5-7.
   - If you are going to have a Modem connection, continue with the "Modem" section on page 5-8.

Network

When you select **New** in the Options window, the Server Properties window appears with the Network connection checked.

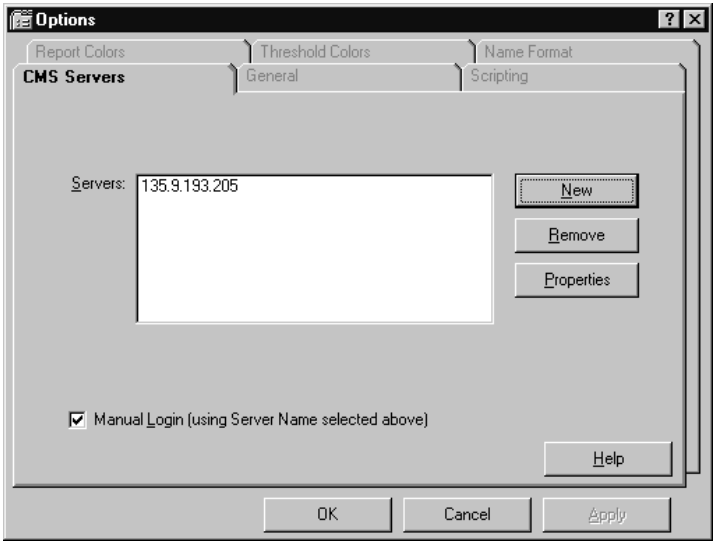


1. Server Name text box
2.Connection Box
3. CMS Network Address: text box

To establish a network connection, do the following:

1. In the **Server Name** text box, enter the name of the server that you will be using. As you type it, the **Server Name** will appear in the **CMS Network Address** text box.
2. Use the **Network Port** default of 23 unless otherwise instructed by your system administrator.
3. Click on **OK**. The system brings you back to the CMS Servers tab folder.

The CMS Servers tab folder displays the options you chose.



Besides **New**, the other options in the CMS Servers tab are as follows:

- **Remove**—Highlight the name of the server and select this option to remove the CMS server configuration that you entered previously. You will get a message asking if are sure you want to delete the server configuration. Select **Yes** or **No**.
- **Properties**—Highlight the name of the server and select this option to display the Server Properties window, where you can view or change the CMS server configuration properties.

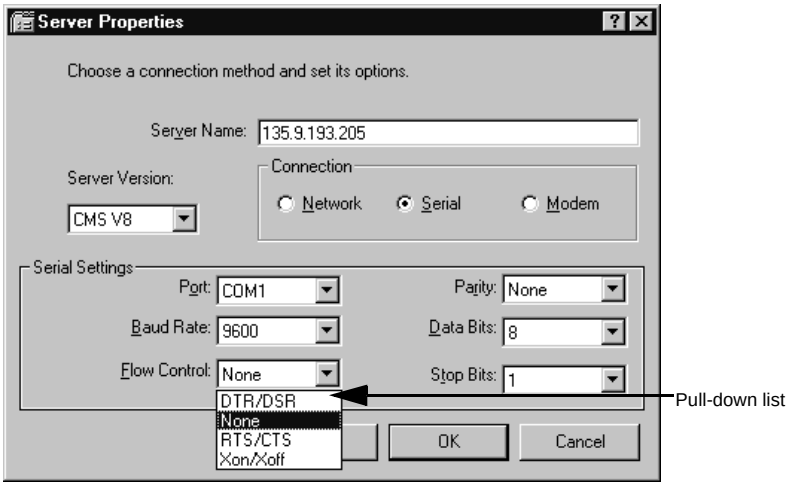
Select **OK** to accept the Network settings. You have to select a server from the list before you select **OK**.

The system brings you back to the Supervisor Controller window. At this point you are still not logged into the CMS server, but you have established connection settings to the CMS server.

Now you are ready to log into the CMS server. See "Logging Into the CMS Server — First Time" on page 5-9.

Serial

If you selected the serial setting in the Connection box of the Server Properties window, the Server Properties window is changed, as shown below:



In the Server Properties box, do the following:

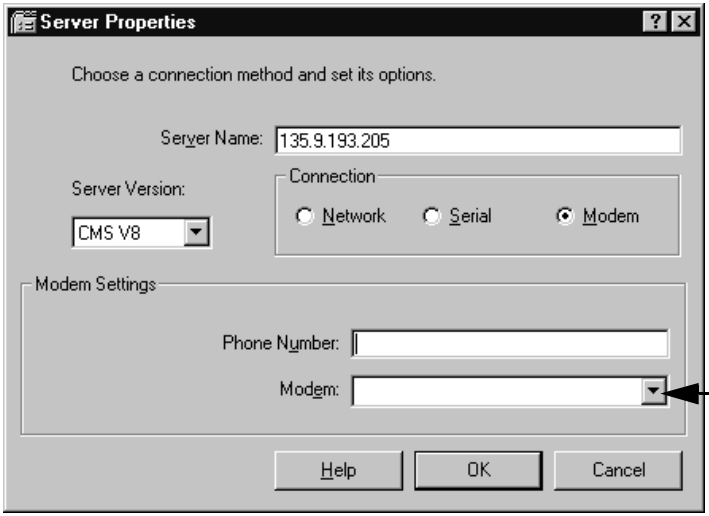
1. In the **Server Name** text box, enter the name of the server that you will be using.
2. In the Serial Settings box, enter all settings for the serial connection. Each setting has a pull-down list with various options (see the example above). See your CMS Administrator for serial settings.
3. When finished entering serial settings, click on **OK**. The CMS Servers tab displays.
4. Select **OK** to accept the serial settings.

The system brings you back to the Supervisor Controller window. At this point you are still not logged into the CMS server, but you have established connection settings to the CMS server.

Now you are ready to log into the CMS server. See "Logging Into the CMS Server — First Time" on page 5-9.

Modem

If you selected the modem setting in the Connection box of the Server Properties window, the Server Properties window displays the Modem Settings box, as shown below:



In the Server Properties window, do the following:

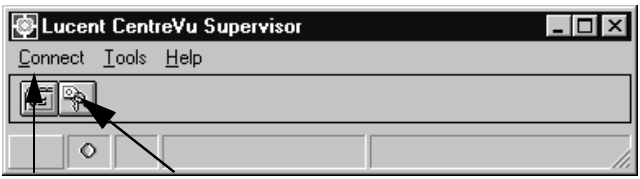
1. In the **Server Name** text box, enter the name of the server that you will be using.
2. In the **Phone Number** text box, enter the number to the CMS server. If you do not know the phone number, contact your CMS System Administrator.
3. In the **Modem** box, select the modem from the pull-down list of modems configured in *Windows*.
4. Select **OK.** The CMS Servers tab displays.
5. Select **OK** to accept the modem settings.

The system brings you back to the Supervisor Controller window. At this point you are still not logged into the CMS server, but you have established connection settings to the CMS server.

To log into the CMS server, see "Logging Into the CMS Server — First Time" on page 5-9.

Logging Into the CMS Server — First Time

After you have established connection settings to the CMS server, you can log into the CMS server by using the **Connect** menu or using the **Login** icon (see the graphic below).



1. To log into the CMS server for the first time, do **one** of the following:
   - Select **Login** from the **Connect** menu.

   - Click on the **Login** icon: .
   - Depending on how you established connection settings to the CMS server, one of two actions will occur:
   - For an automatic login connection, the Login Information dialog box appears. Follow Steps 4 through 7 in "Automatic Login" on page 5-10.
   - For a manual login connection, the Manual Login dialog box will appear. Follow Steps 2 through 6 in "Manual Login" on page 5-11.

Logging Into CMS Server — After First Time

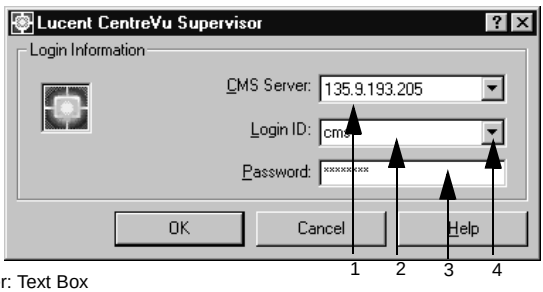
After you have logged into Supervisor for the first time and established your login ID and password, the login procedures change slightly. Follow the procedures below for automatic and manual login.

Automatic Login

If the connection settings were established for automatic login, you will use the Automatic Login dialog box. Now, each time you open the Supervisor application, the Supervisor Controller window will appear, along with the Login Information dialog box.

To log into the CMS server, do the following:

1. Double click on the **Supervisor** icon in its program group. The Supervisor Controller window appears, along with the Login Information dialog box in the forefront, as shown below:



1. CMS Server: Text Box
2. Login ID: Text Box
3. Password: Text Box
4. History list of Login IDs

2. Select the **CMS Server** from the pull-down list of servers.
3. Select the **CMS Version** from the pull-down list. Version 8 Supervisor is compatible with either R3V6 CMS or R3V8 CMS. You must select the version of CMS that is on the server you have selected. If you select the wrong version of CMS, you will receive an error message. See Chapter 9, “Troubleshooting,” for more information.

NOTE:

If you select CMS R3V6, you will see both Generic 2 and Generic 3 ACDs and their associated data. If you select R3V8 CMS, you will see only Generic 3 ACDs and data, and Generic 2 ACD data. You will not be able to access Generic 2 ACDs.

4. Type your CMS login ID in the **Login ID**: text box, or choose it from the history list of IDs (if it has been entered previously).
5. Tab to the **Password**: text box.
6. Type your CMS password in the **Password**: text box.
7. Select **OK**.

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

Once you connect to the CMS server, the Supervisor Controller window appears with CMS operations available on the toolbar. The status line is active and two new menus (**Commands and Scripts**) appear in the menu bar.

Now you are ready to learn more about the Supervisor Controller window. See "Exploring the CentreVu Supervisor Controller" on page 5-18.

Manual Login

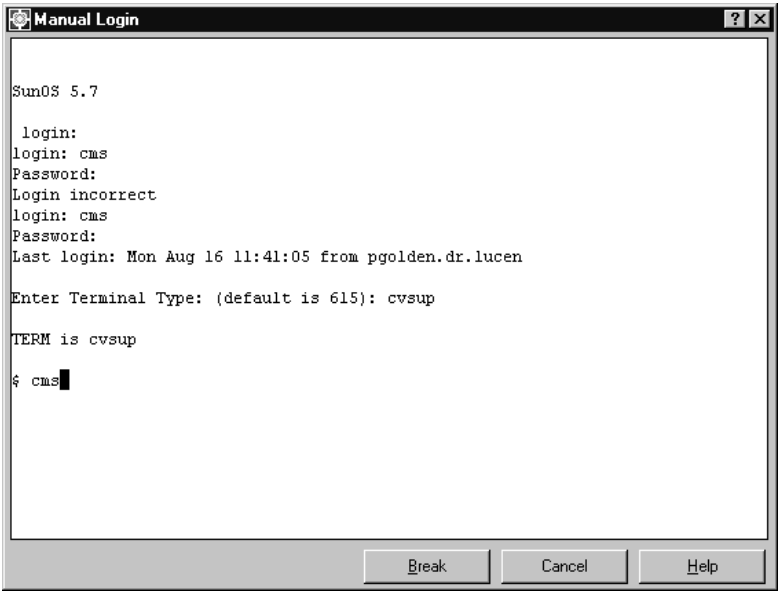
If the connection settings were established for manual login, you will log into the CMS server through the Manual Login dialog box. Now, each time you open the Supervisor application, the Supervisor Controller window will appear, along with the Manual Login dialog box.

NOTE:

The Manual Login window is not recommended for standard *Solaris* use (for example, it should not be used for editing files). The Manual Login dialog box is not a Terminal Emulator.

To log into the CMS server using the manual login, do the following:

1. Double click on the **Supervisor** icon in its program group. The application brings up the Supervisor Controller window and the Manual Login dialog box (in the forefront). At this time, you are not logged into the CMS server.



2. In the Manual Login dialog box, at the `login:` prompt, enter your CMS Login ID.

   NOTE:

   The prompts will appear only after you have entered information for the previous prompt. All prompts are shown in the Manual Login dialog box for convenience.

3. At the `Password:` prompt, enter your CMS password.
4. If the `Enter Terminal Type:` prompt displays, enter **`cvsup`**.
5. If the *Solaris* system prompt displays, enter **cms**.
6. At the `Input terminal type:` prompt, enter the terminal type `cvsup` , or press Enter if the default listed is `cvsup`.

The Supervisor Controller window appears.

The Controller window includes the **Commands** and **Scripts** menus and additional items, which relate to CMS, in the **Tools** menu. Also, the status line is now active.

NOTE:

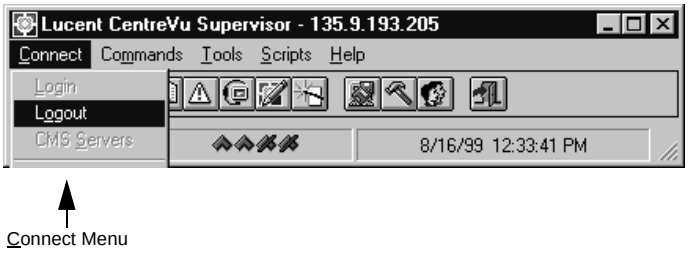
For more information on the scripting feature, refer to Chapter 3, “Scripting,” in the *CentreVu® R3V8 CMS Administration* (585-210-910) document.

Now you are ready to learn more about the Supervisor Controller window. See “Exploring the CentreVu Supervisor Controller” on page 5-18.

Logging Off the *CentreVu* CMS Server

You can log off the CMS server by using any of three options, which are explained below.

1. To log off the CMS server, do **one** of the following:
   - Select **Logout** from the **Connect** menu.



   - Click on the **Exit** icon: , or select **Exit** from the **Connect** menu. This logs you out of the CMS server as well as the *CentreVu* Supervisor application.
   - Click on the **Logout** icon: .

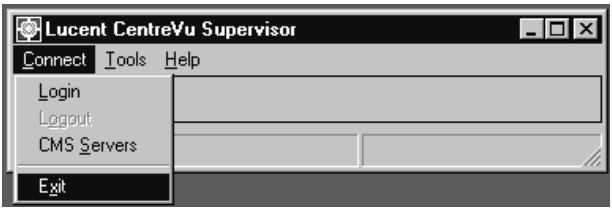
2. The application responds with the following question:

3. Select **Yes** to log off the CMS server. One of two things can happen:
   - If you selected **Exit**, Supervisor logs you out and closes the application.
   - If you selected **Logout**, the Supervisor Controller window remains open, but it is now in disconnected mode (see "Not Logged Into the CMS Server" on page 5-18 for details).
4. Go to "Exiting Supervisor" on page 5-15.

Exiting Supervisor

To exit from the Supervisor application, do the following:

1. Select **Exit** from the **Connect** menu.



2. If you try to exit from the Supervisor application before logging off the CMS server, the following message displays:

3. Select one of the following:
   - **Yes**—Supervisor automatically logs you off of the CMS server and then exits from the application.
   - **No**—you are returned to the Controller and remain logged into the CMS server.

Changing Connection Settings

If you want to change connection settings to the CMS server, do the following:

NOTE:

You cannot be logged into a CMS server when you change connection settings.

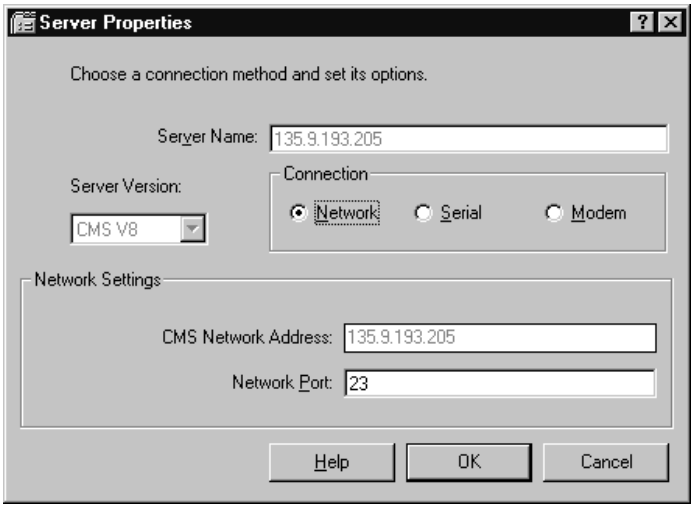
1. Open the Supervisor application.
2. If your connection to the CMS server is set for automatic login, go to Step 3. If your connection to the CMS server is set for manual login, go to Step 4.
3. Select **Cancel** from the Login Information dialog box (this closes the Login Information dialog box).
4. Select **Cancel** from the Manual Login dialog box (this closes the Manual Login dialog box).
5. The system responds by returning to the Controller.
6. Open the Options dialog box by doing **one** of the following:
   - Select **Options...** from the **Tools** menu.
   - Click on the **Options** icon:

   The Options dialog box appears with the CMS Servers tab folder open.

   NOTE:

   You can also open the Options dialog box by selecting **CMS Servers** from the **Connect** menu.
7. In the CMS Servers tab folder, select **Properties**.

The Server Properties window appears. Notice that the **Server Name** is displayed and cannot be changed.



8. In the Connection box, click on the type of connection you want, **Network**, **Serial**, or **Modem**.

   NOTE:

   See "Establishing the Connection" on page 5-4 for information on entering serial and modem information.

9. Change any settings as needed.
10. Select **OK** to change the connection.

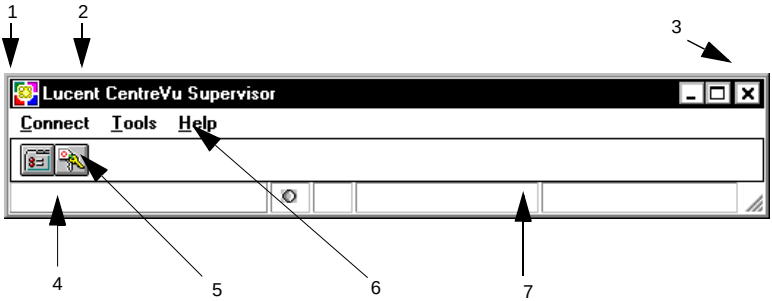
The CMS Servers tab folder appears.

Exploring the *CentreVu* Supervisor Controller

The following sections explain the different parts of the Controller window as it appears when you are not logged into the CMS server and when you are logged into the CMS Server.

Not Logged Into the CMS Server

This section details the Controller window as it appears when you are not logged into the CMS server. The following graphic illustrates the basic Controller window:



1. System Menu Box
2. Title Bar
3. Maximize/Minimize/Close Window Sizing Buttons
4. Status Bar
5. Toolbar
6. Menu Bar
7. Login Status Indicator

System Menu Box

The system menu box is a common *Windows* convention. It allows you to perform common windows conventions, such as closing the current window or application.

Title Bar

The title bar is a common *Windows* convention. It shows the name of the application.

Toolbar

The toolbar contains buttons that are used for quick access to specific features of the application. When you are not logged into the CMS server, the two buttons available on the toolbar are as follows:

Button	Name	Command
	Options	Accesses the window needed to change your login options.
	Login	Initiates a connection to the CMS server.

When you move your cursor over a toolbar button, a tooltip displays next to your mouse pointer with a brief description of the command the button performs. The status bar also displays a description of the command that particular button performs.

Maximize, Minimize, and Close Buttons

The maximize, minimize, and close buttons are a common *Windows* convention. They adjust the size of the window, or close the window.

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**, which shows a green light if you are currently logged into the CMS server, or shows a gray light if you are not logged into the CMS server.

Menu Bar

A common *Windows* convention. The menu bar lists the available drop-down menus. When you are not logged into the CMS server, the menu bar has the following menus available:

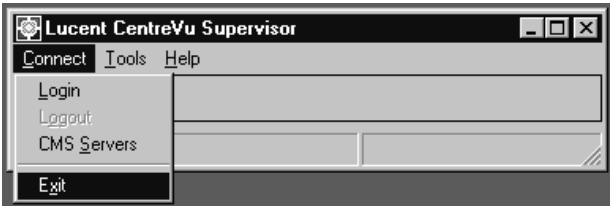
Connect

Tools

Help.

The following sections outline the options available from each menu.

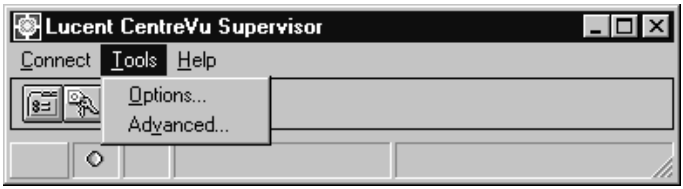
From this menu, you can initiate or discontinue a connection to the CMS server. The **Connect** menu, shown below, has the following options:



Menu Item	Action
Login	Selecting the **Login** from the **Connect** menu displays the Manual Login window if the Manual Login Option is set, and displays items in the Automatic Login window if the Manual Login Option is not set.
CMS Servers	Selecting **CMS Servers** from the **Connect** menu opens the CMS Service tab in the Options window. When you are not logged into the CMS server, the CMS Service tab allows you to select Network, Serial, and Modem settings.
Exit	Selecting **Exit** from the **Connect** menu closes the Supervisor application.

Tools

The **Tools** menu, shown below, has the following options:



Menu Item	Action
Options... 	Selecting **Options** from the **Tools** menu or selecting the Options button on the toolbar, opens the **Options** window. When you are not logged into the CMS server, you can set standard Supervisor communications options in the Options window.
Advanced... (No Icon)	Selecting **Advanced...** from the **Tools** menu opens the Advanced window. This menu item is used for debugging purposes. Do not change the settings on the Advanced window unless you are instructed to do so by a Lucent Technologies associate.

Help

You can access Supervisor on-line help from all windows by doing any of the following steps:

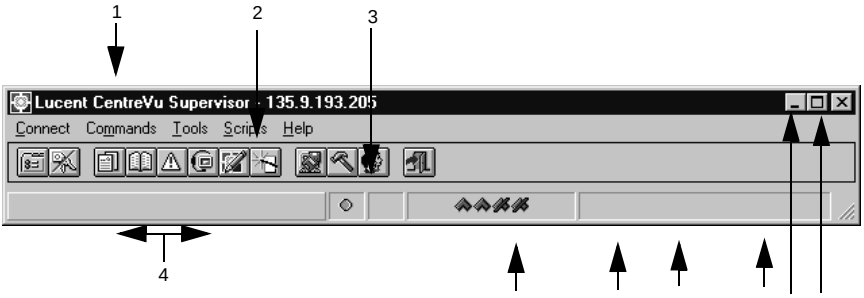
- **Pressing the F1 key**—displays help specific to the current window.
- **Selecting the Help button** (if available)—displays help specific to the current window.
- **Selecting Help from the menu bar** (shown below)—allows you to choose from the following options:

Menu Item	Action
Contents	Selecting **Contents** opens the Supervisor on-line help table of contents.
Technical Support	Selecting **Technical Support** opens a window that provides Technical Support information.
About CentreVu Supervisor	Selecting **About CentreVu Supervisor** opens the Supervisor Help About window, which shows the software version number.

Some windows also offer a style of help called “What’s This?” When the [?] icon on a title bar or the “What’s This?” item on a right mouse-button popup menu is selected, a popup help topic displays information about the area of the window to which the mouse cursor is pointing.

Logged Into the CMS Server

The Supervisor Controller window, when logged into the CMS server, consists of the following components:



1. Title Bar
2. Menu Bar
3. Toolbar
4. Status Line
5. Login Status Indicator
6. Exception Count
7. ACD Status Indicator(s)
8. CMS Date and Time
9. Minimize Button
10. Maximize Button

NOTE:

The System Menu Box, Title Bar, and Maximize/Minimize buttons are not defined below because they work the same when you are logged into the CMS server as they do when you are not logged into the server.

Depending on what your CMS user permissions are, some menu items and toolbar buttons may not be accessible to you.

Toolbar

The toolbar contains buttons that are used for quick access to specific CMS commands and tools. Based on your CMS user permissions, some or all of the following buttons will appear on your toolbar when you are logged into CMS.

Button	Name	Command
	Options	Accesses the window needed to change your environment options.
	Logout	Disconnects from the CMS server.
	Reports	Initiates the Reports command.
	Dictionary	Initiates the Dictionary command.
	Exceptions	Initiates the Exceptions command.
	Agent Administration	Initiates the Agent Administration command.
	Call Center Administration	Initiates the Call Center Administration command.
	Report Wizard	Initiates the Report Wizard command.

Button	Name	Command
	CMS System Setup	Initiates the CMS System Setup tool.
	Maintenance	Initiates the Maintenance tool.
	User Permissions	Initiates the User Permissions tool.
	Exit	Logs you out of CMS and closes the Supervisor application. A message box notifies you that you are logged in and asks if you wish to continue the exit.

When you move your cursor over a toolbar button, the status bar gives a description of what the toolbar button does.

Status Bar

The status bar is located at the bottom of the window and is used to display CMS application status. It is also used to display a brief description of each of the toolbar buttons when the mouse pointer is over the button.

- **Login Status Indicator**—shows a green light if you are connected to the CMS server, or shows a gray light if you are disconnected from the CMS server.
- **Exception Count**—gives you the current count of exceptions for all ACDs for which you have exception permissions. The exceptions count is cleared to zero at the beginning of the interval. For information on CMS exceptions, refer to Chapter 7, “Exceptions,” in the *CentreVu® CMS R3V8 Administration* (585-210-910) document.
- **ACD Status Indicators**—shows which ACDs are active/inactive. There can be up to eight ACD icons showing, depending on how many ACDs this CMS supports. If you place your mouse over the ACD status indicator, the current ACD displays in the status bar. There are two variations of ACD status indicators, as follows:
  - — If the link to any one of the ACDs is down, the icon will be crossed out.
  - — If there is a TCP/IP connection between the switch and CMS, the ACD icon will contain a bar. This means that CMS and the switch are not fully communicating at this time. This is a transitory state,
- **Current Date and Time**—shows the current date and time of the CMS server you are logged into.

Menu Bar

The menu bar lists the available menus. When you are logged into the CMS server, there are five menus available on the menu bar:

- **Connect**
- **Commands**
- **Tools**
- **Scripts**
- **Help**.

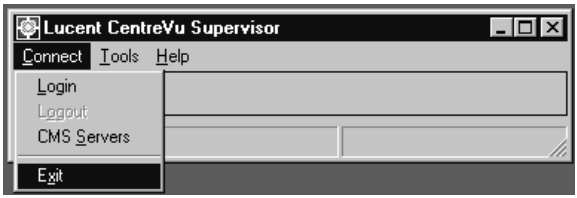
NOTE:

The **Commands** menu item is available only when you are logged into the CMS server. All of the options in the **Commands** menu are CMS-specific.

The test on the following pages describes the options available from each menu.

Connect

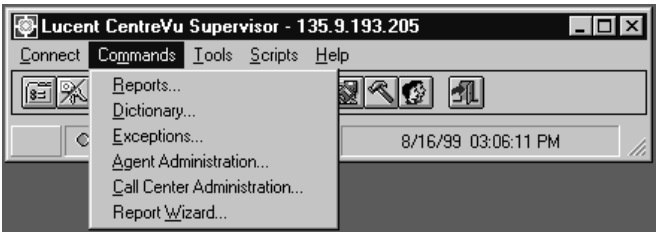
The **Connect** menu shown below has the following options:



Menu Item	Action
Logout	Selecting **Logout** from the **Connect** menu or the Logout button on the toolbar allows you to log out of the CMS server. When you select **Logout**, a message box confirming the logout action displays. If you select **OK**, the logout sequence begins. Once the logout is complete, Supervisor is still open but you are not connected to the CMS server.
Exit	Selecting **Exit** from the **Connect** menu closes the Supervisor application. If you are logged into the CMS server when you select **Exit**, a message box notifies you that you are logged in and asks if you wish to continue the exit. If you select **Yes**, you are automatically logged out of the CMS server and Supervisor is closed. If you select **No**, the exit is cancelled and you are returned to the Controller, still logged into the CMS server.

Commands

The **Commands** menu shown below gives you access to the **Reports**, **Dictionary**, **Exceptions**, **Agent Administration**, and **Call Center Administration** subsystems in CMS. It also gives you access to the Report Wizard.



Menu Item	Action
Reports	When you select **Reports** from the **Commands** menu or select the Reports button on the toolbar, the **Reports** selector window opens. You will see the following tabs to choose from: • Real-Time • Historical • Integrated. Any Custom Reports you have created are ported to Supervisor. You can view and print the reports in Supervisor. To edit the reports, or create new ones, use the Terminal Emulator or a CMS terminal. From the **Reports** command, you can view, print, and export data from all of the standard CMS reports, Custom CMS Reports, Supervisor Integrated and Graphical reports, and Report Designer reports.

Dictionary

When you select **Dictionary** from the **Commands** menu or select the Dictionary button on the toolbar, the **Dictionary** selector window opens. You will see the following tabs to choose from:

- Operations
- Reports.

From the **Dictionary** command, you can assign names to splits/skills, trunk groups, call work codes, reason codes, ACDs, VDNs and vectors, enter and edit agent names and agent groups, view and define CMS database items and calculations, and modify split/skill and trunk string values.

Exceptions

When you select **Exceptions** from the **Commands** menu or select the Exceptions button on the toolbar, the **Exceptions** selector window opens. You will see the following tabs to choose from:

- Operations
- Reports.

From the **Exceptions** command, you can administer timing or counting-based thresholds for exceptions and report on those exceptions.

Agent Administration

When you select **Agent Administration** from the **Commands** menu or select the Agent Administration button on the toolbar, the **Agent Administration** selector window opens. You will see the following tabs to choose from:

- Operations
- Reports.

From the **Agent Administration** command, you can view, add, delete, or modify Agent-related parameters on the switch, such as Change Agent Skills.

Call Center Administration

When you select **Call Center Administration** from the **Commands** menu or select the Call Center button on the toolbar, the **Call Center** selector window opens. You will see the following tabs to choose from:

- Operations
- Reports

From the **Call Center** command, you can view, add, delete, or modify call work codes, change VDN skill preferences, setup split/skill and VDN call profiles, and make trunk and VDN group assignments.

Report Wizard

When you select Report Wizard form the Commands or select the Report Wizard button, the *CentreVu* Supervisor Report Wizard window appears. The wizard provides instructional help that guides you through a series of tasks that create a new customized report. Report Wizard is a supplement to Report Designer.

For more information about the Report Designer, see the *CentreVu*® *Report Designer Version 8 User Guide* (585-210-930), or select Help in any Report Designer or Report Wizard window.

Tools

The **Tools** menu, in addition to accessing the **Options** window and the **Add Button** and **Remove Button** wizards, gives you access to the CMS **System Setup**, **Maintenance**, and **User Permissions** subsystems.

The **Tools** menu has the following options

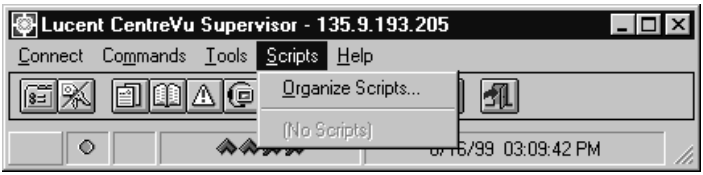
Menu Item	Action
Options...	When you select **Options** from the **Tools** menu or select the Options button on the toolbar, the **Options** window opens. You can set standard Supervisor preferences in the Options window. You will see the following tabs: • General • Report Colors • Threshold Colors • Name Format • Scripting. **NOTE:** Selecting the Scripting tab in the Options window lets you log script execution as minimum, normal, or maximum. This window also lets you select a default script owner (for automatic scripts). You can also specify a name for the log file and view the contents of the log file.

Menu Item	Action
Advanced...	This menu item is used for debugging purposes. Do not change the settings on the Advanced window unless you are instructed to do so by a Lucent Technologies associate.
Add Button	Selecting the **Add Button** tool starts the Add Button wizard, which steps you through the process of creating a button and adding it to the toolbar.
Remove Button...	Selecting the **Remove Button** tool displays a window that tells you how to remove a button from the toolbar.
System Setup	When you select **System Setup** from the **Tools** menu or select the CMS System Setup button on the toolbar, the **CMS System Setup** selector window opens. The only active tab in the **CMS System Setup** tool is the Operations tab. From **CMS System Setup** you can view and modify information relevant to how the CMS and switch were configured during installation.
Maintenance	When you select **Maintenance** from the **Tools** menu or select the Maintenance button on the toolbar, the **Maintenance** selector window opens. You will see the following tabs to choose from: • Operations • Reports. **Maintenance** is where you perform routine maintenance of the CMS, including backing up data, checking on the status of the connection to the switch, and scanning the error log.

Menu Item	Action
User Permissions	When you select **User Permissions** from the **Tools** menu or select the User Permissions button on the toolbar, the **User Permissions** selector window opens. The only active tab in the **User Permissions** tool is the Operations tab. **User Permissions** is where the CMS Administrator defines CMS user IDs and access capabilities each user will have.

Scripts

The **Scripts** menu gives you access to the Organize Scripts window which displays all logged-in user's scripts and script folders. The **Scripts** menu appears as follows:



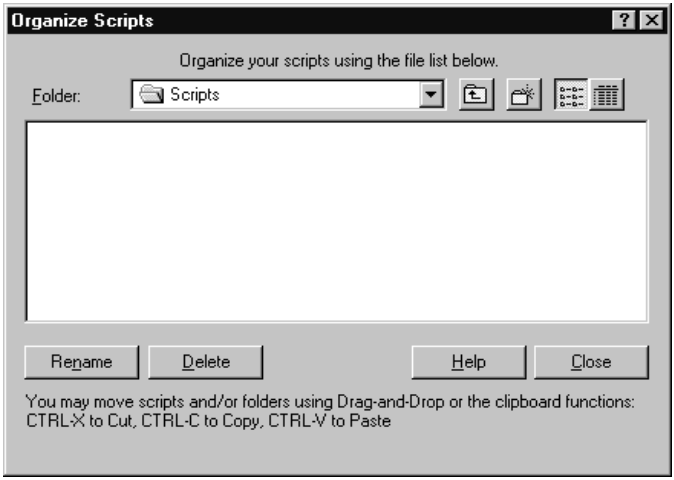
You will be able to perform the following functions in the Organize Scripts window:

- List script names, or show details regarding list size, type, and date modified
- Add a new folder
- Move a script
- Delete a script
- Rename the script.

NOTE:

Scripts are a replacement for Bookmarks. For more information, see Chapter 3, "Scripting," in the *CentreVu CMS R3V8 Administration* (585-210-910) document.

An example of the Organize Scripts window is shown below:



Help

The **Help** menu is the same when you are logged into the CMS as it is when you are not connected.

Using the System Tray Icon

The Supervisor icon resides in the system tray while the application is running.

You can use the system tray icon in the following ways:

- When a real-time report threshold highlight Caution or Warning condition is met, the system tray icon will change to the Caution/Warning icon (as appropriate).
- Select the system tray icon to display a list of all of the Supervisor windows that you have open. You can then select a window from the list to make it the current window.

If a report threshold highlight Caution or Warning condition has been met, the Caution/Warning icon (as appropriate) is displayed next to the report(s) affected by that condition.

Depending on the state shown for the system tray icon, one of the following things happens when you double click on the icon:

- If the **Supervisor** icon is shown, the Controller becomes the current window.
- If the **Caution** icon is shown, all reports that are currently running with a caution condition are brought to the front.
- If the **Warning** icon is shown, all reports that are currently running with a warning condition are brought to the front.

You can control the sort order of the system tray icon menu and turn the feature on and off on the **Tools** | **Options** General tab. For more information, see the *CentreVu® CMS R3V8 Administration* (585-210-910) document.

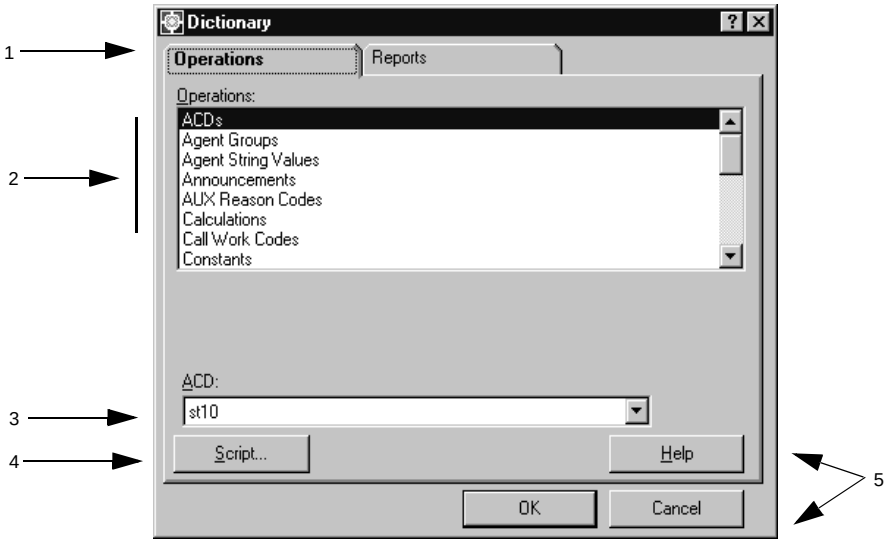
Using Supervisor Menus

Each Supervisor menu item can be selected by doing any of the following steps:

- Clicking on the item
- Using the arrow keys to highlight the item and then pressing Return
- Using the assigned *Windows* keyboard access characters or accelerator keys (hold down the Alt or Ctrl key and press the letter that is underlined in the word you want to select).

Using Supervisor Selector Windows

A selector window is the window that displays after you select an item from the **Commands** or **Tools** menu. An example (the Command| Exceptions Operations tab selector window) is shown below.



1. Tab Folders
2. Available Windows
3. Current ACD
4. Script... Button
5. **OK**, Cancel, Help (and Apply) Buttons

Tab Folders

Typically, there are two tab folders, Operations and Reports, on any **Commands** or **Tools** selector window. The exceptions to this are the **Commands** | **Reports** selector window, which has Real-Time, Historical, and Integrated tabs and the **Tools** | **Options** window, which has General, Report Colors, Threshold Colors, Name Format, Controller, and Scripting tabs.

Select the appropriate tab to bring that folder to the front.

Available Windows

Highlight an item from the list of available windows (usually operations or reports) using your up and down arrow keys or the mouse, and then select **OK** to open that window.

Current ACD

This box shows the ACD that is currently selected.

Script... Button

Scripts are tags you can use to easily access operations and reports you use often. To create a script for a report or operation, do the following:

1. Highlight the item in the selector box.
2. Select the **Script...** button. The Save as Script dialog box appears.

For more information on using the Scripting feature, see Chapter 3, “Scripting,” in the *CentreVu® CMS R3V8 Administration* (585-210-910) document.

OK, Cancel, and Help Buttons

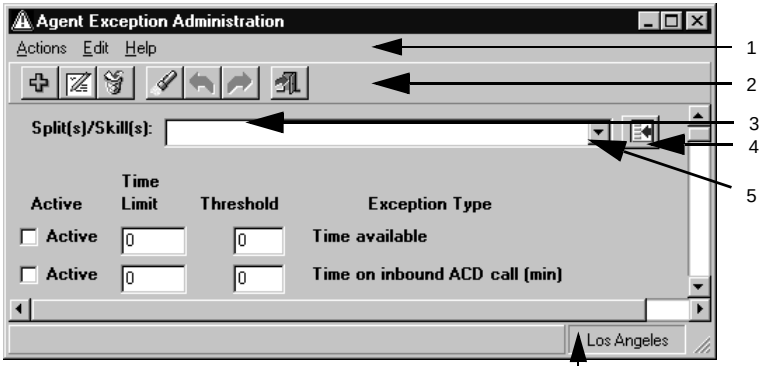
The **OK**, **Apply**, **Cancel**, and **Help** buttons you see on Supervisor windows perform standard *Windows* actions. When you select each button, the result is the following:

- **OK**—accepts the current input and continues to the next window.
- **Cancel**—cancels the current input and returns you to the previous window.
- **Help**—opens the help topic specific to this window.

Completing Input Windows

Once you have selected an operation or report, an input window displays. The information required on the input window depends on where you are in the system. An example of an input window is shown below.

:ons



1. Menu Bar
2. Toolbar Action(s)
3. Input Field(s)
4. Browse Button
5. History List
6. Current ACD

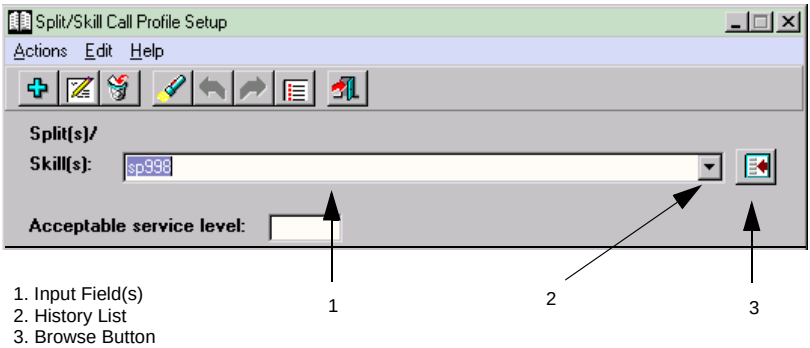
Input windows have all or some of the following items:

- **Menu Bar**—includes menus for CMS **Actions** (Add, Delete, Find One, Next, Previous, List All, and Exit), **Edit** options (Cut, Copy, Paste, and Clear All), and Supervisor **Help**.
- **Toolbar Action Buttons**—lets you perform CMS actions (Add, Delete, Find One, Next, Previous, List All, and Exit) by clicking on a button. See Chapter 6, “Performing CMS Operations,” for more information on the action buttons.
- **Input Fields**—text boxes where you type in the information needed to complete the CMS action.
- **History List**—displays a list of inputs you have previously used in the input field.

- **Browse Button**—lets you browse through all possible items for the input field. See “Using the Browse Button” on page 5-43 for more information. Also see “Selecting Report Run Dates” and “Selecting Report Run Times” in Chapter 7, “Using CentreVu Supervisor Reports.”
- **Current ACD**—displays the ACD on which you are working.

Completing Input Fields

Below is an example of an input window. The items related to completing input windows are labeled.



1. Input Field(s)
2. History List
3. Browse Button

To complete an input field, do one of the following:

- Type in the information requested.
- Select the information from the **history list** of previously used items.

During each CMS session, Supervisor recalls the items you have previously selected for each input field. If an input field has an associated history list, you can use the history list to select an item for the input field.

- Use the **Browse** button to view all available items for the input field, and then select an item(s) for the input field. See “Using the Browse Button” on page 5-43 for more information. Also see “Selecting Report Run Dates” and “Selecting Report Run Times” in Chapter 7, “Using CentreVu Supervisor Reports.”

Using the Browse Button

When you select the Browse button, a window opens that lets you select items for the input field. The browse selection window will differ depending on whether the input is for a single entity or for multiple entries of the entity.

Single Entity Input

If the input is for a single entity (split/skill, vector, agent, VDN, trunk, or trunk group), a browse selection window similar to the following example displays:

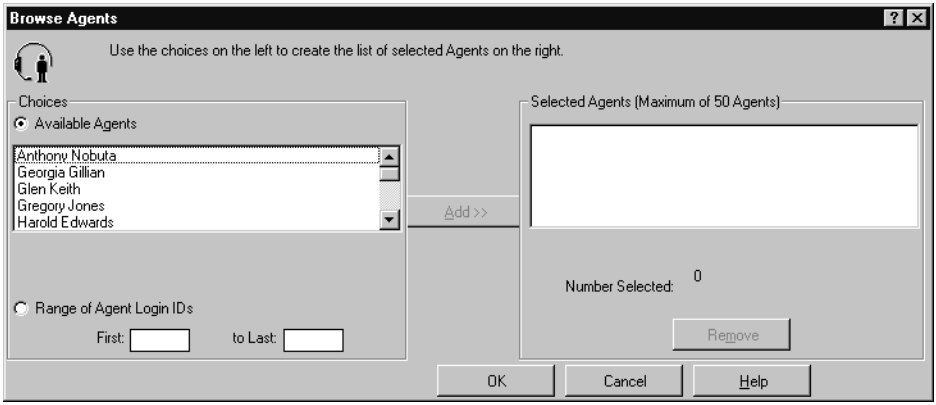
To use this window, do the following:

1. Click on the name/number of the entity that you want to work with.
2. Select **OK**.

   The input window appears. The input field is populated with the name/number of the entity that you selected in the Browse window.

Multiple Entries Input

If the input allows for multiple entries of the entity (split/skill, vector, agent, VDN, trunk, or trunk group), a browse selector window similar to the following example displays:



To use this window, do the following:

1. In the **Choices** box, click on the entity names/numbers with which you want to work.

   You can select the entities individually from the **Choices** box or you can select a range of entity numbers, or you can use a combination of the two.

   To select a range, do the following:

   a. Select the **Range of...** option.

   b. In the **First:** input field, type the beginning entity number for the range.

   c. Tab to the **to Last:** input field.

d. In the **to Last:** input field, type the ending entity number for the range.

NOTE:

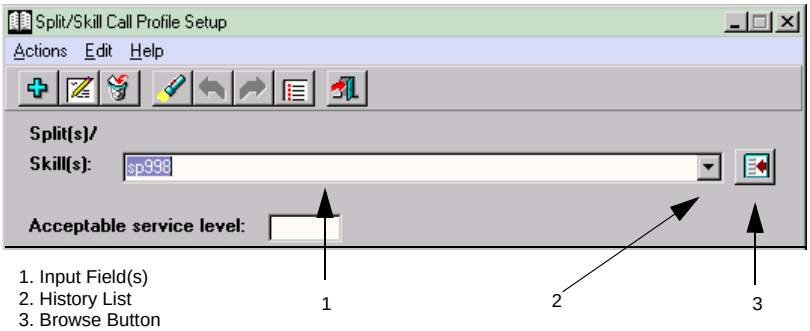
For example, if your call center has skills 1, 2, 3, 4, and 5 and you want to select all of them, you can type **1** in the **First**: input field and type **5** in the **to Last**: input field.

2. Select **Add>>**. The entities that were highlighted in the **Choices** box are now listed in the **Selected ...** box.
3. Select **OK**.

   The input window displays and the input field is populated with the name/number of the entities that you selected in the Browse window.

Using the History List

There is a drop-down history list on the right of each entity input field. This history list shows values you have previously entered in this field.



1. Input Field(s)
2. History List
3. Browse Button

You can use the history list to select the entity that you would like to include for the report/operation that you are running by doing the following steps:

1. Place the cursor in the input field.
2. Select the History List button.
3. Point and click the mouse cursor on the item that you would like to add to the input field.

   The history list closes and the item is added to the input field.

Closing Supervisor Windows

To close Supervisor windows, use any of the standard *Windows* methods or select **Exit** from the **Connect** menu. Selecting **Exit** from the **Connect** menu closes all windows and quits the application.

If the Controller is closing a window due to the CMS server shutting down or changing to single-user mode, a warning message is issued and then any open windows are closed.

CentreVu Supervisor

Performing CMS Operations

Overview

The information in this chapter teaches you about the menus and inputs you will find when performing CMS operations in Supervisor. This chapter includes the following sections:

- Running an Operation
- Operations Menus
- Adding Items in an Operations Input Window
- Finding Items from an Operations Input Window (using Find one and List all)
- Modifying Items in an Operations Input Window
- Deleting Items from an Operations Input Window.

This chapter gives you general information about how to use the windows you access from the Supervisor Operations tabs. You will find Operations tabs available under the following commands and tools:

- **Commands | Dictionary**
- **Commands | Exceptions**
- **Commands | Agent Administration**
- **Commands | Call Center Administration**
- **Tools|System Setup**
- **Tools|Maintenance**
- **Tools|User Permissions.**

No matter which command or tool you use to select an operation, how you perform the operation is the same.

NOTE:

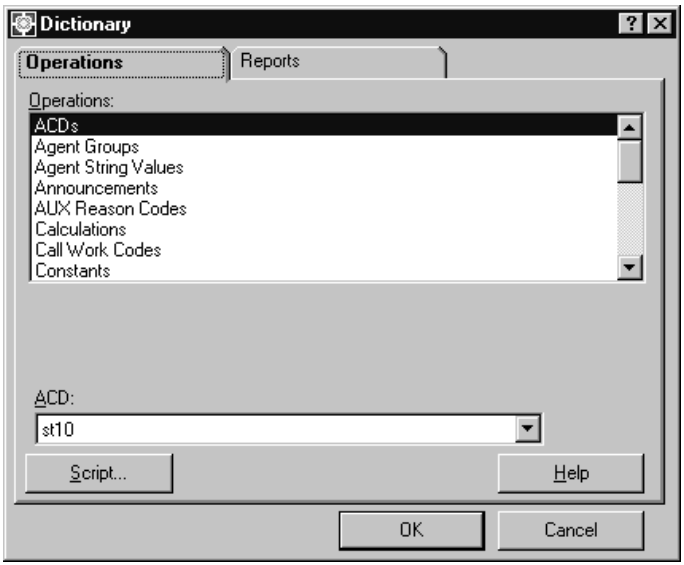
If information applies to a specific Operations tab (**Dictionary**, **Exceptions**, **Agent Administration**, **Call Center Administration**, **System Setup, Maintenance**, or **User Permissions**), then that information is in the appropriate chapter in the *CentreVu CMS R3V8 Administration* (585-210-910) document. For example, **Agent Administration** has several procedures specific to that command, so those procedures are located in Chapter 6, “Agent Administration,” in that document.

Running an Operation

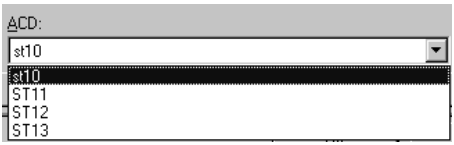
To run an operation, do the following:

1. Select one of the following options under **Commands** or **Tools**:
   - **Dictionary**
   - **Exceptions**
   - **Agent Administration**
   - **Call Center Administration**
   - **System Setup**
   - **Maintenance**
   - **User Permissions**.

The Operations list box for the application you selected appears. In the following example, **Dictionary** was selected.

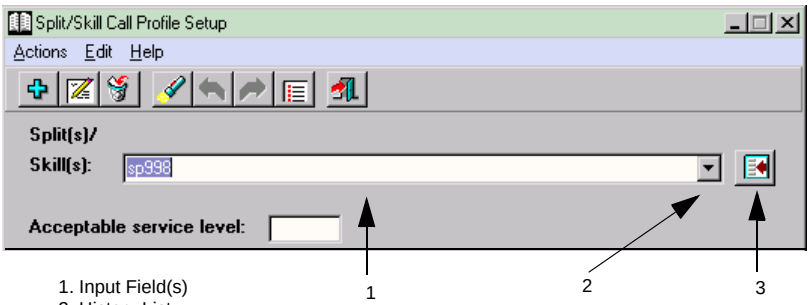


1. Select an operation from the Operations list box.
2. From the ACD drop-down list, select the ACD for which you want to perform the operation, as shown below:



3. Select **OK** in the Dictionary window.
4. The operation input window appears. The inputs required will vary, depending on which operation you are running.
5. Complete the operation input window.

   The following example (from the **Commands** |**Call Center Administration**| **Operations** tab) shows the possible types of information that might be required to complete an operation input window.



1. Input Field(s)
2. History List
3. Browse Button

6. Fill in the input field(s). Input fields are where you specify the information that you would like to view, add, modify, or delete. Use any of the following methods:
   - Type in the name or number of the input requested.
   - Use the history list to select an input that you have previously used.
   - Press the Browse button to view all of the available inputs.

7. Ensure that the **correct ACD** is selected. The current ACD (selected on the Operations selector window) is displayed at the bottom of the input window.
8. If you want to perform an operation for a different ACD than is currently selected, do the following (if you are in an input window, select the Cancel button to exit the input window):
   a. Go to the selector window you chose in Step 1.
   b. Change the ACD on the selector window.
   c. Select the operation you want to perform.
   d. Select **OK**.

   The input window displays again and the input fields are populated with any inputs that you may have previously entered.
9. Select **OK**.

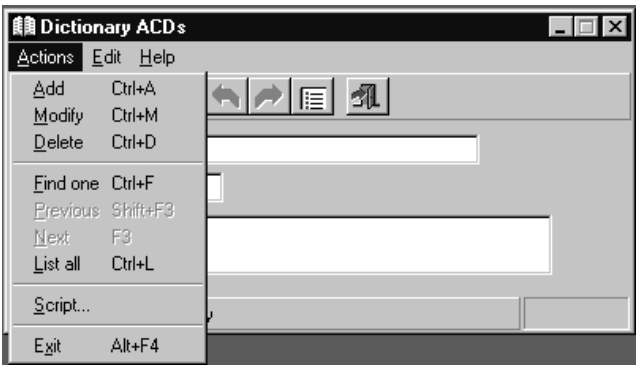
   The operation runs.

Operations Menus

The **Actions** and **Edit** menu options are commonly found on windows that you access from the Operations tab.

Actions Menu

The **Actions** menu is found in the **Dictionary**, **Exceptions**, **Agent Administration**, **Call Center Administration**, **Maintenance**, **System Setup**, and **User Permission** operations windows. Actions are used to perform CMS-related functions. When the **Actions** menu item is available, the menu bar looks like this:



This menu contains all of the CMS actions that are available in your current window. The menu items and their associated buttons on the toolbar are in the same order. For example, **Add**, **Delete** and **Modify** are grouped together, as are **Find One**, **Previous**, **Next**, and **List All**. The **Exit** selection is always last in the menu and the last button on the toolbar.

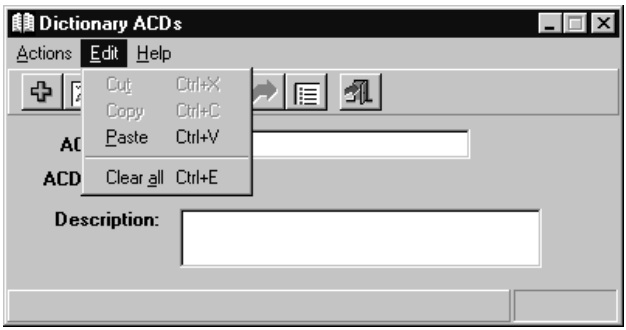
The following table lists the **Actions** menu items, their associated buttons, and a definition of each action. Not all of the actions will be available to you all of the time. If an action is not available in the current window, it is grayed-out on the **Actions** menu list and does not appear on the toolbar.

Action	Button	Description
Add		Adds the data entered in your current window to the database.
Cancel		Cancels the operation that is in progress.
Copy Group/ Create		Creates a new group from an existing one.
Delete		Removes the entry on your current window from the CMS database.
Exit		Exits the window and other associated windows.
Find one		Searches the database for entries that match the input values in your current window.
Get contents		Provides access to the members of the agent group.
List all		Lists all the entries that matched the current field values.
List Devices		Lists all the devices which have been specified in the Backup/Restore Devices window.
Modify		Changes the database entry to reflect the new values entered in your current window.
Next		Once you have used the Find One function, the **Next** button displays the next match found. Otherwise, this button is disabled.
Previous		Once you have used the Find One function, the **Previous** button displays the previous match found. Otherwise, this button is disabled.

Action	Button	Description
Run/Start		Starts the process for your current window.
Script...	(No Icon)	Displays the Save as Script - Action dialog box. This dialog box enables you to enter information in the appropriate fields, then select the **Add**, **Modify**, or **Delete** action, and save it as a script. If Add, Modify, or Delete are not present, the Save as Script menu item will not be present.
Select tables		Allows you to select specific tables to Back Up or Restore.

Edit Menu

The **Edit** menu is found on all **Dictionary**, **Exceptions**, **Maintenance**, **System Setup**, and **User Permissions** operations windows. Edit options are used to perform functions that are related to *Microsoft Windows**. When the **Edit** menu item is available, the menu bar (and **Edit** menu) looks like this:



*Microsoft Windows is a trademark of Microsoft Corp.

The **Edit** menu has the following options:

Menu Item	Shortcut	Action
Cut	Ctrl + X	A standard *Windows* feature that removes selected text or graphics and places the item(s) on the clipboard. Cut is available on windows that have input fields and on List All windows.
Copy	Ctrl + C	A standard *Windows* feature that copies the image of the currently selected chart, text, or cell to the clipboard in *Windows* metafile format. This allows you to paste the item into any *Windows* application that supports Copy and Paste, such as a word processor. This item is available when text is selected in the window or the cell is selected in a List All window. You can also access Copy from the right mouse button pop-up menu.
Paste	Ctrl + V	A standard *Windows* feature that inserts a copy of the contents of the clipboard at the insertion point or replaces the selection (if any) with the text on the clipboard. This item is available only on windows that have input fields and when the clipboard is not empty.
Clear all	Ctrl + E	A feature that is available only on windows that have input fields. This menu item clears all of the values entered in the input fields. Option buttons are reset to their default value.

Adding Items to the CMS Database

After you select an operation, an input window displays. You may want to add an item to the *CentreVu* CMS (such as an agent group, a CMS user ID, or agent login IDs). To add items from an operations input window, do the following:

1. Fill in the information required in the input fields.
2. Select **Add** from the **Actions** menu, select the Add button on the toolbar, or press Ctrl+A.

   If the add is successful, the status bar at the bottom of the window reads "Successful." If you do not have the required write permissions to perform the add you attempted, the status bar reads "Failed," and an error message displays.

Finding Items in the CMS Database

After you select an operation, an input window displays. You may want to work with an item in the CMS (such as an agent group, a CMS user ID, or agent login IDs), but do not recall how that entity is named or specific details about the entity. You can use **List all** or **Find one** from the **Actions** menu to locate items in the CMS.

The following sections teach you how to use **List all** and **Find one** in Supervisor.

List All

You will use **List all** when you do not recall any of the specific information about an entity, or when you want to list all of the entities of a specific type to see if any already exist that meet your needs.

To list all of the items related to an operations window, do the following:

1. Leave the text boxes on the input window blank to list all of this type of entity that exist on the CMS, or complete specific text boxes to refine the list to a specific range of output.
2. Select **List all** from the **Actions** menu, select the List all button on the toolbar, or press Ctrl+L.

   A list of all of the items that match the criteria on the input window displays.

Find one

You will use **Find one** when you know some (or all) of the specific information about an entity, or when you want to list all of the entities of a specific type, one-by-one.

To find one entity at a time, do the following:

1. Complete all or some of the text boxes on the input window to try to find a match, or leave the text boxes blank to list, one-by-one, all of this type of entity that exist on the CMS.

   This is your find criteria.

2. Select **Find one** from the **Actions** menu, select the Find one button on the toolbar, or press Ctrl+F.

   The text boxes are completed with information related to the first entity that matches the find criteria for which you have permissions.

3. If there is more than one match, the status bar reads "xx matches found." You can scroll through the **Find one** matches by selecting **Next** and **Previous** from the **Actions** menu, by selecting the Next button and Previous button on the toolbar, or by pressing F3 for Next or Shift-F3 for Previous.

   You can also search on partial strings (for example, ac) if the input field is not labeled with an (s). For example, you cannot use the wild cards * or ? to search for strings in any entity name input fields that are labeled with (s), such as Split[s].

   NOTE:

   For more information on List all and Find one, refer to the *CentreVu® CMS R3V8 Administration* (585-210-910) document.

Modifying Items in the CMS Database

After you select a category from the Operations tab, an input window displays. You may want to modify the information for an item that already exists in the *CentreVu* CMS database (such as an agent group, a CMS user ID, or agent login IDs). To modify items from an Operations input window, begin with Step 1 or Step 2, whichever is appropriate:

1. If you **do** know all or part of the specific information required for the input text boxes, do the following:
   a. Complete the text boxes for which you have information.
   b. Select **Find one** from the **Actions** menu, select the Find one button on the toolbar, or press Ctrl+F. The input window displays with the appropriate information.
2. If you **do not** know the specific information required for the input text boxes, do the following:
   a. Select **List all** from the **Actions** menu, select the List all button on the toolbar, or press Ctrl+L.
   b. Locate the information for the entity that you want to modify and note the relevant information.
   c. Close the List all window. The input window displays.
   d. Complete the text boxes for which you have information.
   e. Select **Find one** from the **Actions** menu, select the Find one button on the toolbar, or press Ctrl+F. The input window displays with the appropriate information.
3. Update the information in the text boxes.

4. Select **Modify** from the **Actions** menu, select the Modify button on the toolbar, or press Ctrl+M. If the **Modify** is successful, the status bar at the bottom of the window reads “Successful.” If you do not have the required write permissions to perform the **Modify** you attempted, the status bar reads “Failed,” and an error message displays.

NOTE:

If you attempted to perform a Modify on a database entry that does not yet exist, the status bar reads, “Does not exist,” and you need to choose **Add** from the **Actions menu** to add the item to the database.

If you leave any fields blank and select Modify, any current data in the blank fields is erased from the database.

Deleting Items from the CMS Database

After you select an operation from the Operations tab, an input window displays. You may want to delete the information for an item that already exists in the CMS (such as an agent group, a CMS user ID, or agent login IDs). To delete items from an operations input window, begin with Step 1 or Step 2, whichever is appropriate:

1. If you **do** know all or part of the specific information required for the input text boxes:
   a. Complete the text boxes for which you have information.
   b. Select **Find one** from the **Actions** menu, select the Find one button on the toolbar, or press Ctrl+F. The input window displays with the appropriate information.
2. If you **do not** know the specific information required for the input text boxes, do the following:
   a. Select **List all** from the **Actions** menu, select the List all button on the toolbar, or press Ctrl+L.
   b. Locate the information for the entity that you want to delete and note the relevant information.
   c. Close the List all window. The input window displays.
   d. Complete the text boxes for which you have information.
   e. Select **Find one** from the **Actions** menu, select the Find one button on the toolbar, or press Ctrl+F. The input window displays with the appropriate information.
3. Select **Delete** from the **Actions** menu, select the Delete button on the toolbar, or press Ctrl+D.

   WARNING:
   No warning message will display when you select Delete. The item you have specified for deletion from the CMS database will automatically be deleted.
4. If the delete is successfully completed, “Successful” appears in the status bar. If the database entry does not exist, “Does not exist” appears in the status bar.

CentreVu
Supervisor

Using *CentreVu* Supervisor Reports

Overview

CMS reports display, report, and summarize the performance of any measured subset of the ACD, including agents, splits/skills, trunks/trunk groups, VDNs, and vectors.

The information in this chapter teaches you how to use all Supervisor reports. The sections are as follows:

- Using the Scripting Feature
- Running a Report
- Selecting Report Run Dates
- Selecting Report Run Times
- Report Menu Bar
- Report Layouts
- Formatting Table Reports
- Formatting Chart Reports
- Minimizing Report Output Windows
- Right Mouse Button Pop-Up Menus

- Rotating a 3D Chart
- Exporting Report Data
- Copying Chart Reports
- Resizing Report Windows
- Changing Column Widths
- Selecting a Printer
- Using Page Setup
- Setting Report Threshold Highlights
- Report Options
- Exiting and Restarting Reports.

Report Menus and Tabs

No matter where you run a report from, the way you select, run, edit, and view a report is the same. You will find reports available under the following menus and tabs:

- **Commands** | **Reports** | Real-Time, Historical, or Integrated tab
- **Commands** | **Dictionary** | Reports tab
- **Commands** | **Exceptions** | Reports tab
- **Commands** | **Agent Administration** | Reports tab
- **Commands** |**Call Center Administration** | Reports tab
- **Commands** |**Report Wizard**
- **Tools** | **Maintenance** | Reports tab.

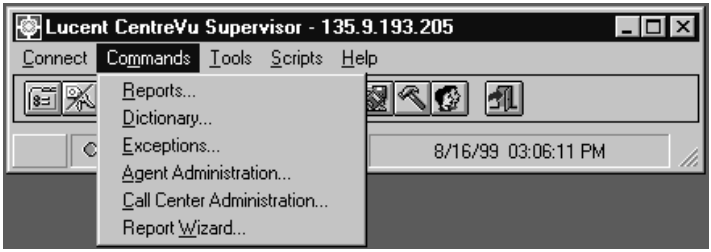
NOTE:
Procedures that relate to specific Commands or Tools are located in the appropriate chapters in the *CentreVu® CMS R3V8 Administration* (585-210-910) document.

Running a Report

If you have Report Designer and want to quickly and easily generate a new customized report, select the **Report Wizard** button in the Controller toolbar. For more information about the Report Designer, see the *CentreVu*® *Report Designer Version 8 User Guide* (585-210-930).

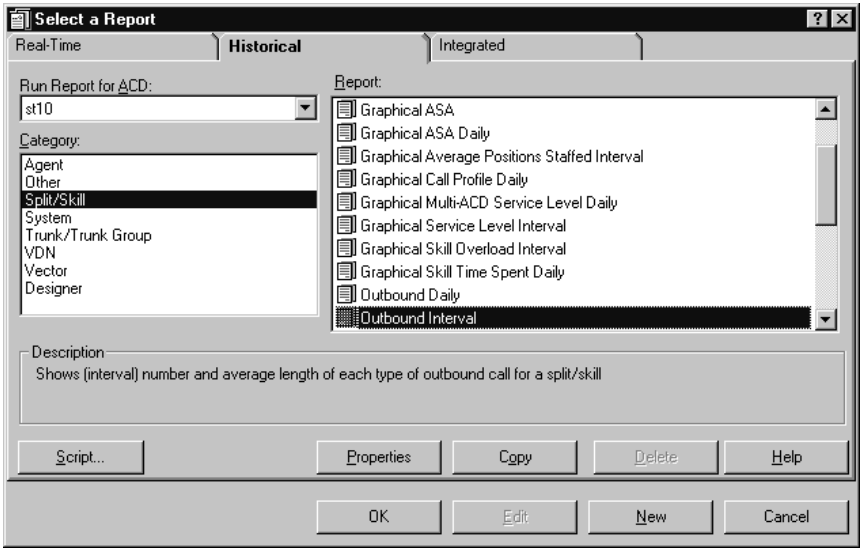
To run a CMS report, do the following:

1. In the Controller toolbar, select **Commands** to display the **Commands** drop-down menu.



2. Select one of the following options:
   - **Commands**|**Reports** |Real-Time, Historical, or Integrated tab
   - **Commands**|**Dictionary** | Reports tab
   - **Commands**|**Exceptions** | Reports tab
   - **Commands**|**Agent Administration** | Reports tab
   - **Commands**|**Call Center Administration** | Reports tab
   - **Tools** |**Maintenance** | Reports tab.

The Report Selector window appears. An example of the Report Selector window is shown below. The tabs in this window may vary, depending on which option you chose under Commands or Tools.



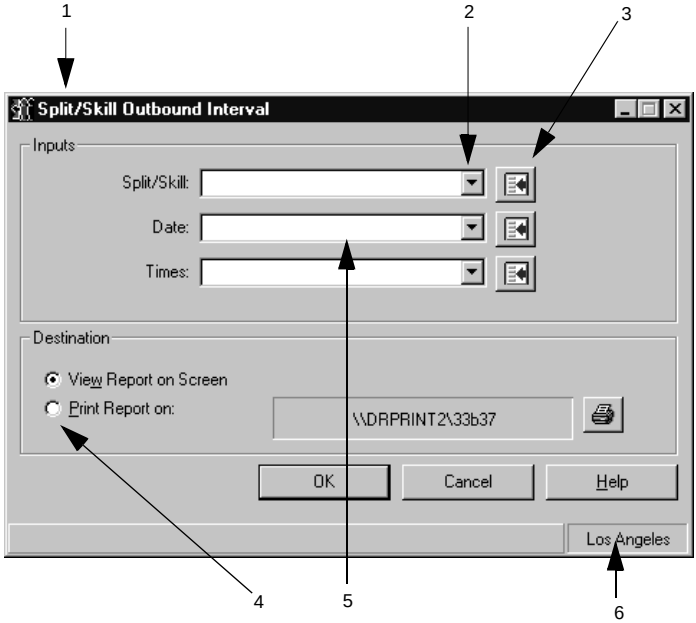
In the Report Selector window:

3. Select a category from the **Category** box.
4. Select a report from the **Report** list box.
5. Select the ACD for which you want to run the report.
6. 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 dialog box, 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.
7. Select **OK**, or double-click on the report. The report input window displays. The inputs required will vary, depending on which report you are running.
8. Go to "Completing the Report Input Window" on page 7-5.

Completing the Report Input Window

The following example shows possible types of input that might be required to run a report. The inputs required will vary, depending on which report you are running.



1. Report Title
2. History List
3. Browse Button
4. Destination Selection
5. Input Field(s)
6. Current ACD

To complete an input window, do the following:

1. Fill in the input field(s). Input fields are where you specify the information for which you are running the report. Do one 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.

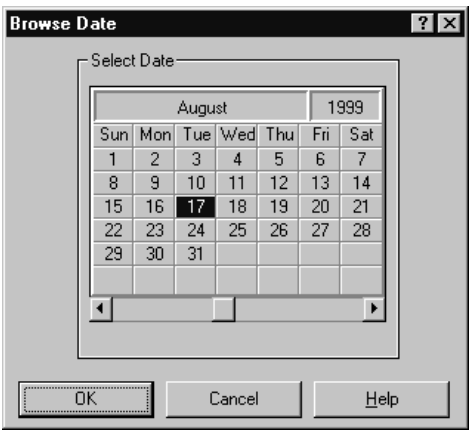
2. For all reports other than **Commands | Reports** Real-Time and Integrated tabs, select the report destination. Reports can be viewed on screen or printed to any printer to which your PC is connected.
3. To select the report destination, do one of the following:
   - Select the **View Report on Screen** destination.
   - Select the **Print Report on:** destination. If you want to print on a printer other than the one displayed, click the button.
4. Ensure that the correct ACD is selected. The current ACD (selected on the Report Selector window) is displayed at the bottom right of the input window.
5. If you want to run a report for a different ACD than is selected, do the following:
   a. If you are in an input window, select **Cancel** to exit the report input window.
   e. Go to the selector window you chose in Step 1.
   f. Change the ACD on the selector window.
   g. Select the Report you want to run.
6. Select **OK** to run the report.

Selecting Report Run Dates

When you run historical reports, you need to select the date or dates for which to run the report. To do this, you can do any of the following:

- Type the date or date range in the **Date(s):** input field.
- Type a relative date (for example, -2 for two days ago).
- Select the date(s) from the history list of previously used date(s) for this report.
- Select the **Browse** button .

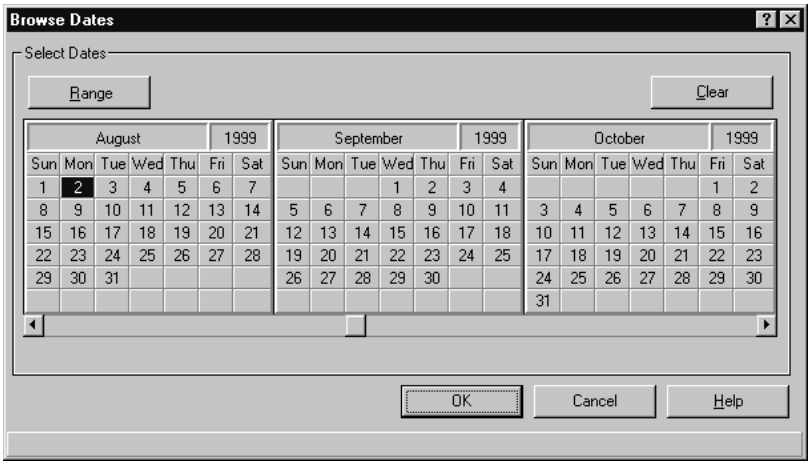
  — If you select the **Browse** button and the input needed is a single date, the following window displays:



To select a specific date, use your mouse to point at a day and click. The day is highlighted.

If you want to choose a date that is not in the current month, use the arrow keys at the bottom of the window to scroll through the months.

— If the input needed is for more than one date, the following window displays:



To select specific dates, use your mouse to point at a day and click. The day highlights. You can select as many days as you want.

To select a range of dates, select the **Range** button, point-and-click on the first day of the desired range, then point-and-click on the last day of the desired range. The dates selected highlight. You can select as many ranges as you want to, but you must select the **Range** button in order to define each range.

If you want to choose a date that is not currently displayed, use the arrow keys at the bottom of the window to scroll through the months.

To clear your current selections, select the **Clear** button.

— If the input needed is for one month, the following window displays:

This window is used in monthly reports where the data is for a single month. The form initially displays with the values in the input field or to the month previous to the current month when the input field is empty. Select a single month and year for the report. The minimum date is January 1980, and the maximum date is December 2055.

— If the input needed is for more than one month, the following window displays:

This window is available in monthly reports where the data is for one or more months. The report runs, beginning with the month entered in the **First Month:** field, and going through as many months as are specified in the **Number of Months:** field.

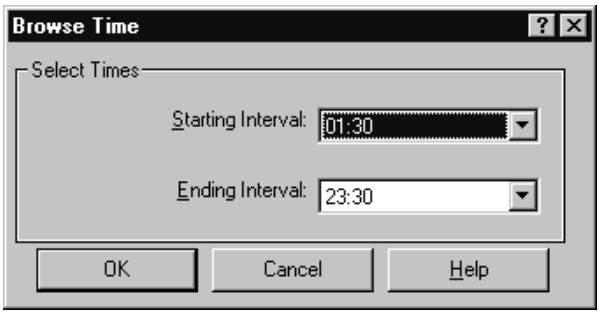
The months are in calendar order in the drop-down box, with the minimum date being January 1980, and the maximum date December 2055.

Selecting Report Run Times

When you run interval historical reports, you need to select the time period for which to run the report. In the report input window, do any of the following:

- Type the time range in the **Times:** input field.
- Select the times from the history list of previously used times for this report.
- Select the **Browse** button next to the **Times:** field.

  If you select the **Browse** button, the following window displays:



  Complete the following fields:

  — **Starting Interval**—select the time you want the report to begin with from the drop-down list. The report data will begin with the interval that begins immediately after the time you enter.

  — **Ending Interval**—select the time you want the report to end with from the drop-down list. The report data will go through the interval that falls within the time you enter.

Report Menu Bar

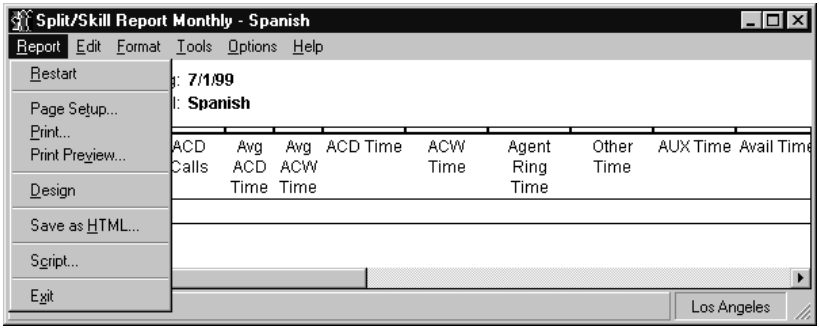
When you run a report, the menu bar at the top of the window has the following options:

- **Report**
- **Edit**
- **Format**
- **Tools**
- **Options**
- **Help**

The following paragraphs detail the menu items that are available in each of these menus.

Report

The **Report** menu has the following options that relate to the report you are running.



Menu Item	Action
Restart	Closes the current report output window and displays the input window for the current report. This allows you to run the same report, changing inputs as needed. The **Restart** menu item will be grayed out if you are currently running a drill-down report. This is disabled for Drill-Down reports and if the report is an unsaved report created using the Report Wizard (this item is enabled when the report is saved).
Page Setup...	Displays the Page Setup window. See "Using Page Setup" on page 7-54 for more information.
Print...	Displays the Print window. See "Selecting a Printer" on page 7-53 for more information. **NOTE:** When you select **Print** from the **Report** menu, the report that is active will be printed according to the options you choose in the Print window. If the report is a real-time report, only one refresh of the report will be printed.
Print Preview...	Displays the report so that you can see it before printing.

Menu Item	Action
Design	If you have purchased the Report Designer software and your CMS User ID is authorized to use the Report Designer, you can access the Report Designer Design Mode window from any report using this menu item. When you select **Design** from the **Report** menu, the report that is currently running remains visible, but you are placed in the Design Mode, where you can edit the report. The Design menu item will be grayed out if you are currently running a drill-down report. **NOTE:** For more information on the Design Mode, see the *CentreVu*® *Report Designer Version 8 User Guide* (585-210-930).
Save	Saves the report that you edited.
Save As	Saves the report that you edited under a different file name.
Save as HTML...	Displays the Save as HTML window, which lets you save a snapshot of the report output as an HTML file. Selecting the **Script** button in this window displays the Save as Script dialog box, which lets you create a script to run the specified report and save the output as an HTML file. **NOTE:** For more information on the Save as HTML feature, see Appendix A, “Saving as HTML.”

Menu Item	Action
Script...	Displays the Save as Script dialog box, which enables you to create a script to run a specified report on schedule and display it on your PC. The script can be interactive or automatic, as follows: • Interactive—the script runs in the current Supervisor session and the actions display on the PC. You can input requested information while the script is running. • Automatic—the script launches a new Supervisor session that logs into CMS and runs the requested tasks in the background. Actions do not display on the PC. The scripts will require a customer-provided scheduler to be run at a later time.
Exit	Closes the active report output window. The location of the report output window is saved when the report is exited, and that is where the report will display the next time you run it.

Edit

The **Edit** menu has the following standard *Microsoft Windows** editing options.

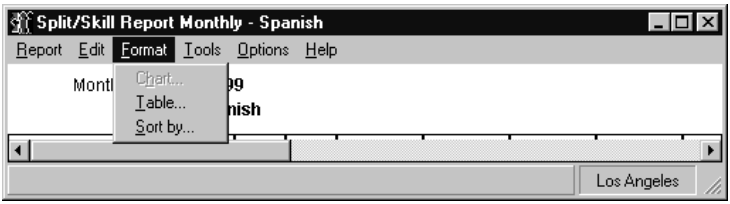
Menu Item	Action
Copy	The image of the currently selected chart is copied to the clipboard in *Windows* metafile format. Then you can paste the chart picture into most *Windows* applications, such as a word processor. You can also access **Copy** from the right mouse button pop-up menu. See "Copying Chart Reports" on page 7-50 for more information.
Export Chart Data...	The Data Export Options window allows you to export the data in the currently selected chart. If the report is a real-time report, only one refresh of the data is exported. If there is more than one chart on this report, this option will be grayed out until you select a chart. You can also access the Data Export Options window from the right mouse button pop-up menu. For more information, see "Exporting Report Data" on page 7-47.

Menu Item	Action
Export Table Data...	The Data Export Options window allows you to export the table data in the report. If the report is a real-time report, only one refresh of the data will be exported. If there is more than one table on the report, this option will be grayed out until you select a table. You can also access the Data Export Options window from the right mouse button pop-up menu. For more information, see "Exporting Report Data" on page 7-47.
Export All Data...	The Data Export Options window allows you to export all data in the report. You will also be allowed to include labels and headers in the data that are exported. If the report is a real-time report, only one refresh of the data will be exported. You can also access the Data Export Options window from the right mouse button pop-up menu. For more information, see "Exporting Report Data" on page 7-47.

*Microsoft Windows is a trademark of Microsoft Corp.

Format

The **Format** menu contains the following actions for modifying the display format of the currently selected object. If one (or more) of the actions does not apply to the selected object, it will be grayed out.



Menu Item	Action
Chart...	Allows you to format a chart. You can also access the Format Chart window from the right mouse button pop-up menu.
Table...	Allows you to format a table. You can also access the Format Table window from the right mouse button pop-up menu.
Sort by...	Allows you to sort the table by several parameters specific to the information in the selected table. You can also access the Sort by window from the right mouse button pop-up menu.

Tools

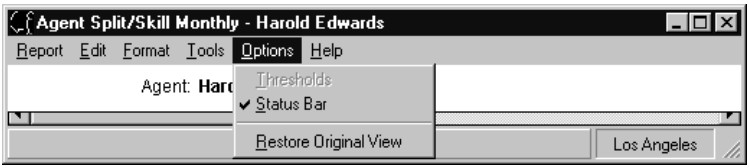
The **Tools** menu contains the following additional actions that affect the currently selected object. You can also access the Tools actions from the right mouse button pop-up menu.

Menu Item	Action
Available Drill-Down Reports	If you are running a report that allows you to access one or more drill-down reports, the available drill-down reports will be accessible from the **Tools** menu. For information on drill-down reports, see the appropriate chapter in the *CentreVu® Supervisor Version 8 Reports* (585-210-929) document.
Threshold Settings...	Opens a window that allows you to view or modify threshold highlight settings. Threshold highlight settings apply only to some real-time data items in real-time and integrated reports. For information on setting threshold highlights, see "Setting Report Threshold Highlights" in this chapter.

Menu Item	Action
Change Agent Splits/Skills	If the current ACD supports Expert Agent Selection (EAS), this menu item reads **Change Agent Skills**; otherwise, it reads **Change Agent Splits**. This menu item is enabled only when the selected table cell in a report is an agent name or agent login ID; otherwise, it is disabled. If you do not have write permission for Agent Administration, then this menu item is not shown. This action opens the Change Agent Skills window (EAS) or Change Agent Split Assignments window (non-EAS) for the selected agent. You can then modify the split/skill assignments for the agent. For information on changing agent splits/skills, see the appropriate chapter in the *CentreVu® CMS R3V8 Administration* (585-210-910) document.

Options

The **Options** menu contains the following actions that affect the basic display of the report.



Menu Item	Action
Thresholds	Turns threshold highlighting on or off for this real-time report. When threshold highlighting is on (there is a check by the menu item), the report shows the colors (icons if the report is minimized) specified in the Threshold Settings window. When threshold highlighting is off (there is no check by the menu item), the report shows none of the threshold highlights (or icons if the report is minimized).
Status Bar	Shows or hides the status bar. When the status bar is hidden, the window remains the same size but the contents are resized to fill the window. You would choose this to get a larger viewing area for the report. When the status bar is made visible, the window remains the same size but the contents are resized to fill the smaller window area. The status bar setting is saved in the report view.
Restore Original View	Restores the Report View to the original settings. All changes made to the format of this report are discarded.

Report Layouts

There are two types of report layouts in Supervisor:

- **Tables**—the Supervisor presentation of standard CMS reports
- **Charts** — the Supervisor presentation of graphical reports.

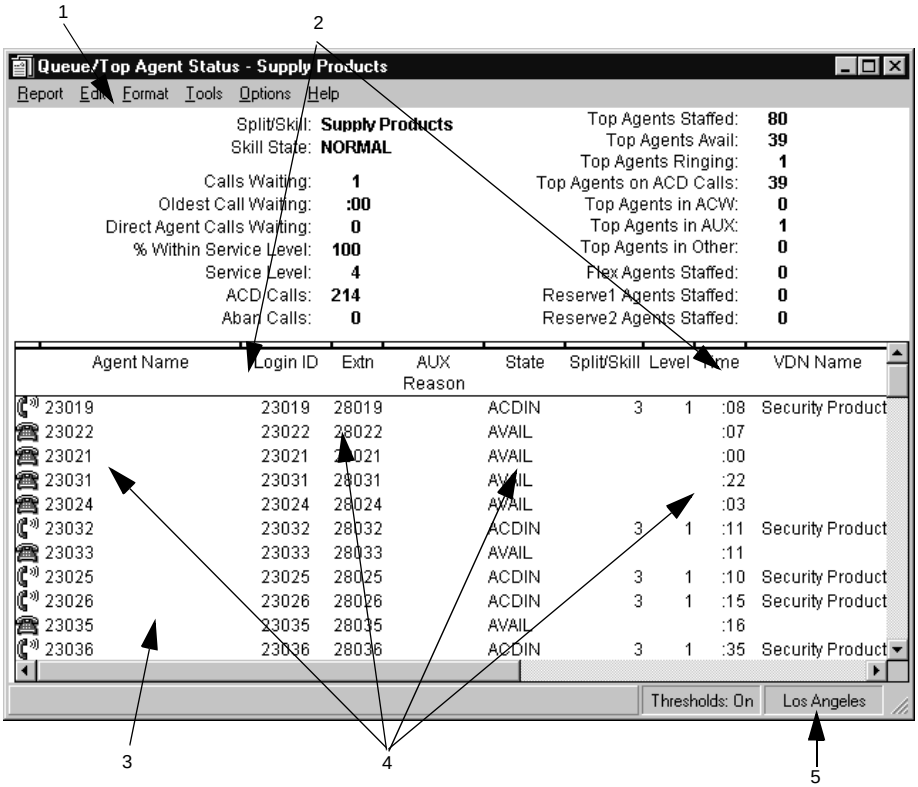
A report can consist of only a table/tables, only a chart/charts, or a combination of tables and charts.

In addition to the tables and charts that make up the main body of reports, reports can include text and field names that are followed by single data items. Text and data fields are used on both table and chart reports.

The following sections describe each type of report layout.

Tables

Most standard CMS reports (reports that are not prefaced by “Graphical”) are displayed in tables. The information on a standard report window is organized as follows:

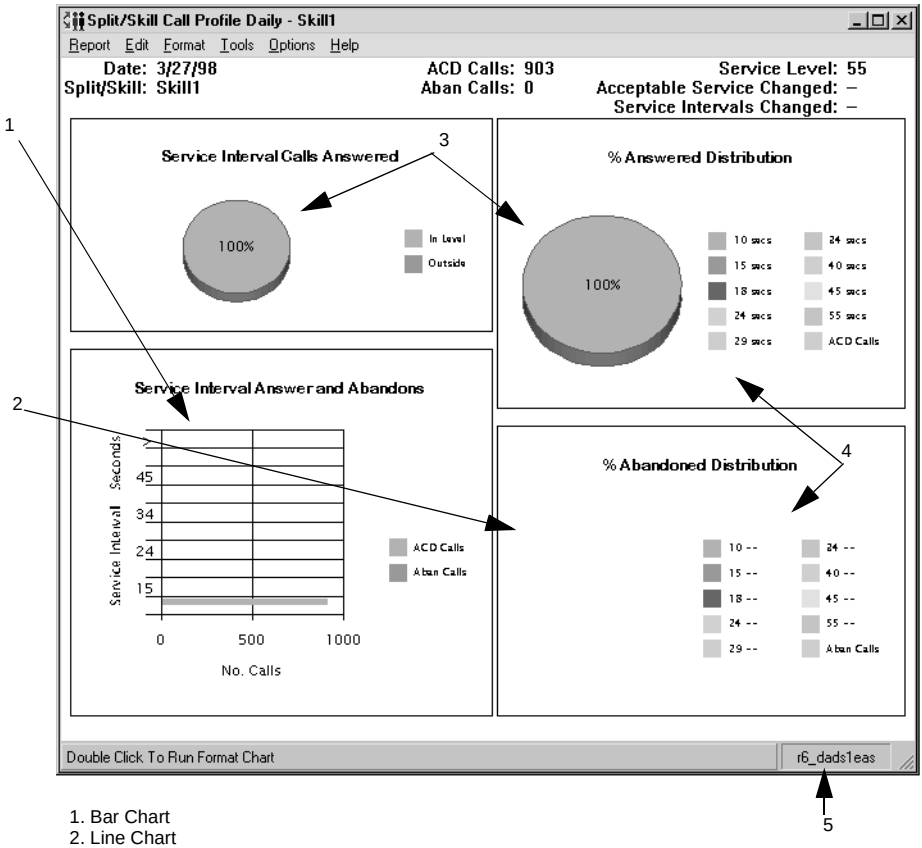


1. Menu Bar
2. Headings
3. Table
4. Columns
5. Current ACD

Standard real-time reports can be sorted. See “Formatting Table Reports” on page 7-24 for more information.

Charts

The graphical *CentreVu* Supervisor reports are displayed in charts. The information on a chart report window is organized as follows:



1. Bar Chart
2. Line Chart
3. Pie Chart
4. Legend
5. Current ACD

There are several options for formatting the appearance of the charts (graphical reports). For more information, see "Formatting Chart Reports" on page 7-28.

Formatting Table Reports

If you are in a report containing a table, you can format how the report is displayed using the Table Format Options window.

NOTE:
The changes you make to a report's format affect only your view of the report. The changes do not affect how other CMS users see the report.

Use one of the following methods to access the Table Format Options window:

- Double click on a column heading in the report.
- Select **Format Table** or **Sort by** from the **Format** menu or the right mouse button pop-up menu.

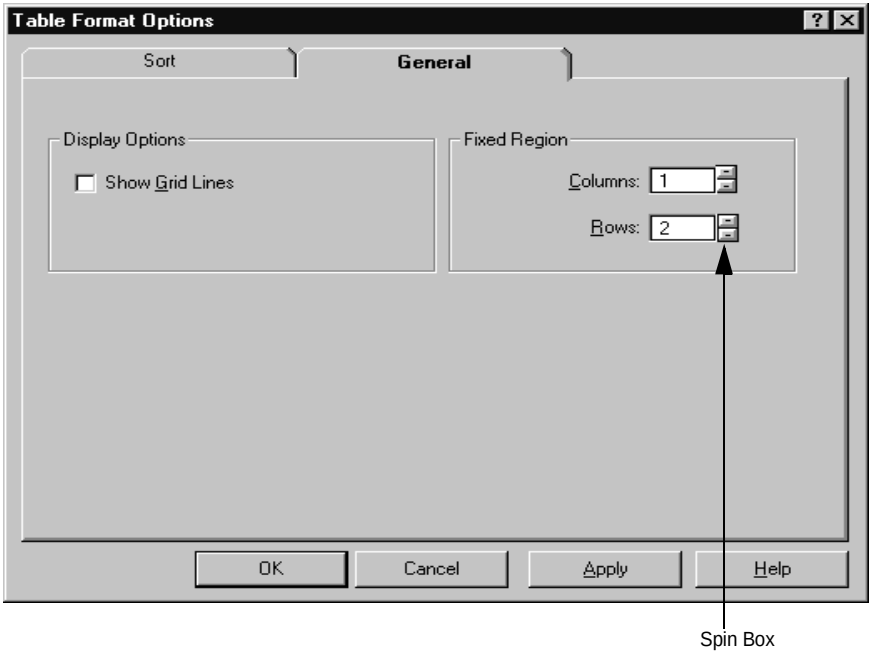
  NOTE:
  The Table Format Options window allows you to make layout changes to a table. All changes you make are saved as part of the report view when the report exits.

  If you select **Sort by**, the Table Format Options window displays with the Sort tab active. If you select **Format Table**, the Table Format Options window displays with the General tab active.

The following sections describe the General and Sort tabs.

General Tab

The General tab allows you to make format changes to a table.

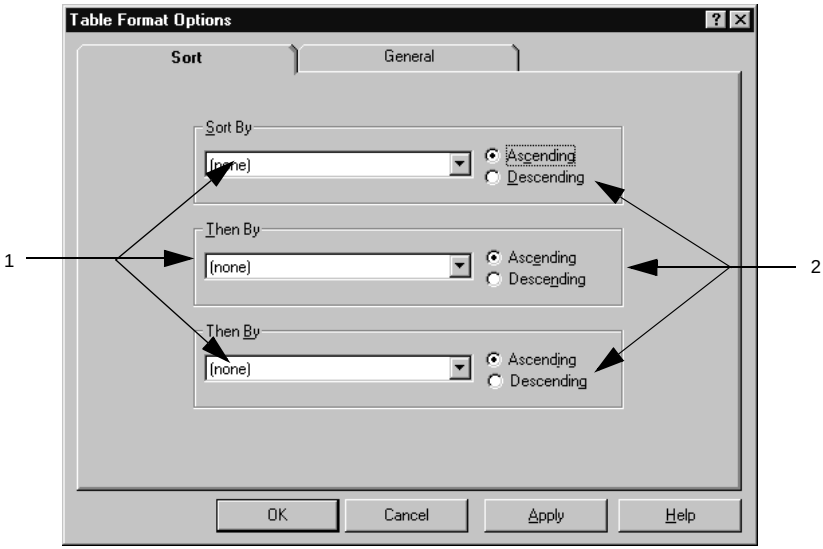


The following table parameters can be changed:

- **Show Gridlines**—specifies whether or not table lines are to be shown in the table.
- **Fixed Region, Columns**—specifies the number of columns from the left of the table that are fixed in place and do not scroll. Valid values are in the range of 0 through 99. You can use the spin boxes to select a valid value or type in the value.
- **Fixed Region, Rows**—specifies the number of rows from the top of the table that are fixed in place and do not scroll. Valid values are in the range of 0 through 99. You can use the spin boxes to select a valid value or type in the value.

Sort Tab

The Sort tab allows you to specify the order in which the following information on the real-time table report is displayed.



1. Sort By Criteria Drop-Down Lists
2. Sort Order

When you are setting up display order for a real-time report, specify the sort column (Sort By) and the sort order (Ascending or Descending). The drop-down list for the Sort By lists all of the database table and item names used in the report.

Some examples of sorting follow:

- Viewing a list of agents alphabetically—select “Agent Name” from the first Sort By drop-down list, select Ascending as the sort order, and leave the other two Sort By boxes set to “(none).”
- Searching for agents who have been in a certain state for too long— select “State” from the first Sort By drop-down list, then select “Time” from the second Sort By drop-down list, and then select Descending as the sort order for the second Sort By.

Sorting may cause report refreshes to take longer. If you wish to speed up the refresh rate, turn off the sort options by selecting “(none)” for all of the Sort By criteria.

Formatting Chart Reports

Charts (found in graphical reports) provide a graphical representation of data. Values or data points are displayed in formats such as bars, lines, filled areas, and pie charts. These data points are grouped into series that are identified with unique colors.

In many chart types, one data point from each series is grouped together by category across an axis. Categories are plotted along the x-axis, while values are plotted along the y-axis. A two-dimensional chart shows series next to each other, while a three-dimensional chart plots series along the z-axis. A chart can also have a title and a legend.

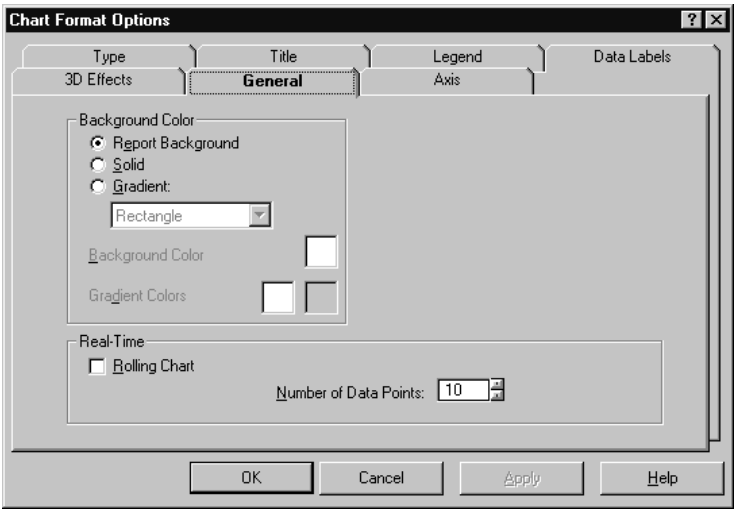
If you are in a graphical (chart) report, you can format how the report is displayed. The changes you make to a report's format affect only your view of the report. The changes do not affect how other CMS users see the report.

To format a chart report, selecting **Format Chart** or **Sort by** from the **Format** menu list or the right mouse button pop-up menu. The Chart Format Options window appears.

The Chart Format Options window has seven tabs: General, 3D Effects, Axis, Type, Title, Legend, and Data Labels. The following sections describe each of the tabs.

General Tab

The General tab allows you to specify several general options that apply to the chart.

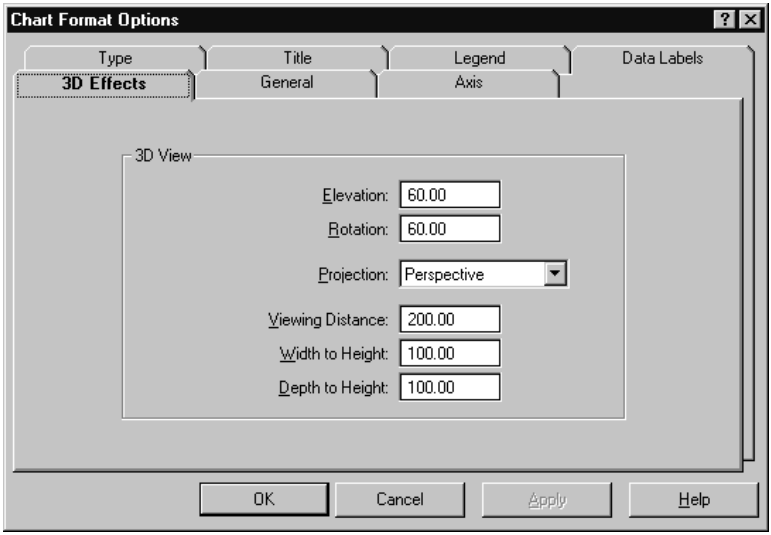


You can change the following chart parameters:

- **Background Color**—specifies whether the backdrop of the chart is a solid color or whether it is displayed as a gradient, a smooth transition from one color to another. The gradient transition can be one of the following: **Horizontal**, **Vertical**, **Rectangle**, or **Oval**. The quality of the gradient effect will vary depending on the video card installed in the PC, or the capabilities of the printer for printed reports.
- **Real-Time**—if the chart is a rolling chart, you can specify the number of data points to be displayed in the chart. Permitted values are 2 through 100, with 10 being the default. A rolling chart is a line chart that is initially displayed with no data points. For each refresh of the report, a data point is added. As data points are added, the chart “rolls” from left to right. When enough refreshes have occurred so that the chart is displaying the number of specified data points, at the next refresh, the oldest data point is dropped from the display and the newest data point is displayed.

3D Effects Tab

The 3D Effects tab allows you to control the 3D appearance of the chart. If the current chart is a 2D chart, this tab is disabled.



The following chart parameters can be changed:

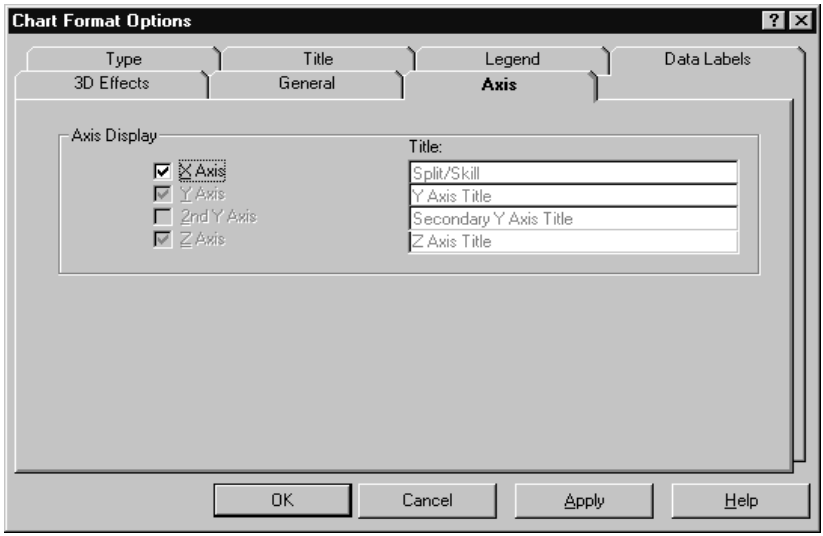
- **Elevation**—a number from 0 through 90 degrees that describes the relative height from which a chart is viewed. An elevation of 90 looks directly down on the top of the chart, while an elevation of 0 looks directly at the side of the chart. The example charts throughout this document use an elevation of 30 degrees.
- **Rotation**—a number from -360 through 360 degrees that specifies the angle that the chart is turned relative to the viewing position. The example charts throughout this document use a rotation of 60 degrees. Rotation does not apply to 3D pie charts.

- **Projection**—selects one of three mathematical algorithms used to give a 3D appearance on a 2D sheet of paper or computer screen. You can choose the following values:
  - **Oblique**: The chart has depth but the X-Y plane does not change when the chart is rotated or elevated.
  - **Orthogonal**: Perspective is not applied to the chart, resulting in less of a 3D effect. The advantage of using this type of projection is that vertical lines remain vertical, making some charts easier to read.
  - **Perspective**: This provides the most realistic 3D appearance. Objects farther away from you converge toward a vanishing point.
- **Viewing Distance**—a number from 50 through 1000 that represents the distance from which the chart is viewed as a percentage of the depth of the chart.
- **Width to Height**—a number from 5 through 2000 that represents the percentage of the chart's height that is used to draw the chart's width.
- **Depth to Height**—a number from 5 through 2000 that represents the percentage of the chart's height that is used to draw the chart's depth.

See "Rotating a 3D Chart" on page 7-46 for an easy way to change the elevation and rotation of a chart using the mouse.

Axis Tab

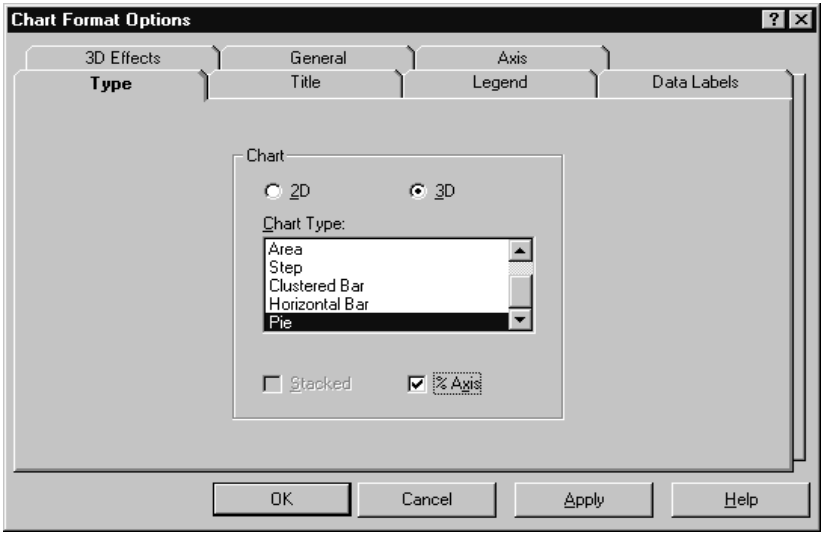
The Axis tab allows you to specify the title that will display on each axis of the chart report.



The **Axis Display** chart parameter can be changed. The Axis Display parameter makes each of the axes visible or invisible. The choices are X Axis, Y Axis, 2nd Y Axis, and Z Axis.

Type Tab

The Type tab lets you change the chart type.



The available options on the Type tab are as follows:

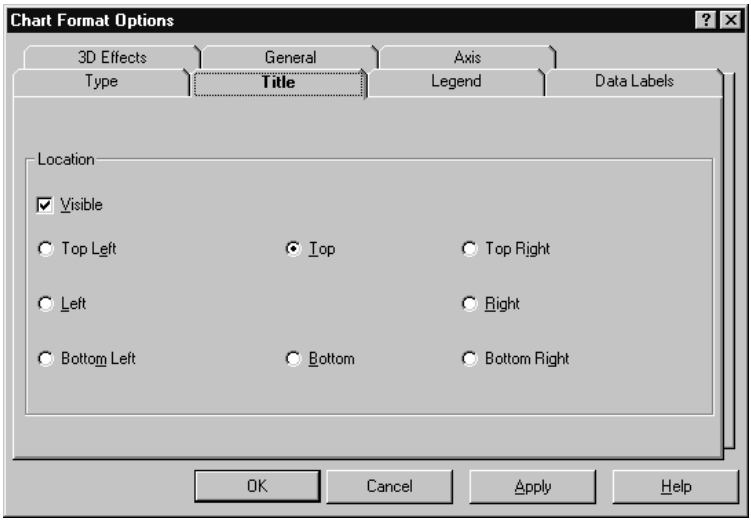
- **2D** and **3D**—changes the chart between 2-dimensional and 3-dimensional views. 2D charts update faster than 3D charts, so if the drawing speed seems too slow, you may want to display charts as 2D.
- **Chart Type**—specifies how the data is presented. You choose a chart type from the list. The types of charts available vary slightly depending on whether a 2D or 3D chart has been selected. All possible chart types are as follows:
  - — Bar Chart (2D and 3D)
  - — Line Chart (2D and 3D)
  - — Area Chart (2D and 3D)
  - — Step Chart (2D and 3D)

- Horizontal Bar Chart (2D and 3D)
- Clustered Bar Chart (3D only)
- Pie Chart (2D and 3D).

- **Stacked** check box—causes the data for all series to be stacked rather than shown separately. This check box is disabled for pie charts.
- **% Axis** check box—causes the value axis (y-axis) to be displayed as percentages rather than as actual data values. This can be combined with the stacked check box to produce a percentage stacked chart.

Title Tab

The Title tab allows you to control the location of the chart title.



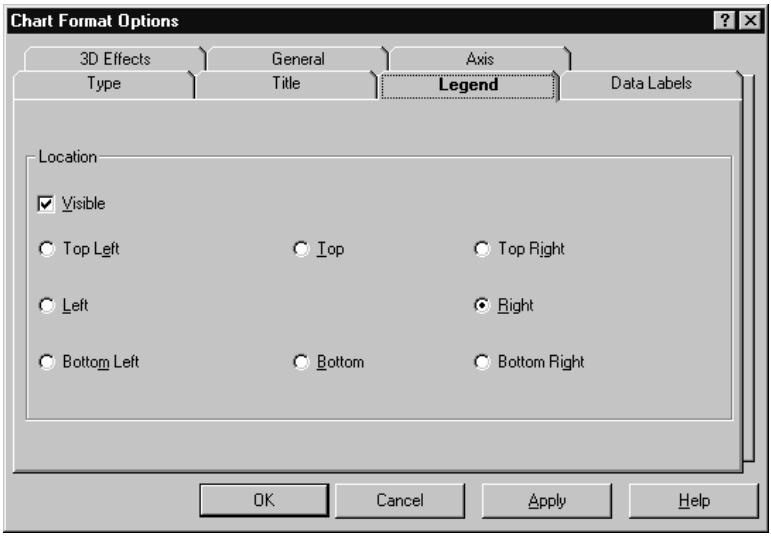
The available options on the Title tab are as follows:

- **Visible** check box—allows you to display or not display report titles.
- **Location** of title—if you elect to have report titles visible, you can select where the titles display. The available options are **Top Left**, **Top** (center), **Top Right**, **Left**, **Right**, **Bottom Left**, **Bottom** (center), and **Bottom Right**.

NOTE:
Since the title takes up space, the drawn chart will be smaller if you have selected Visible. If you wish to increase the size of the chart, do not select the Visible option.

Legend Tab

The Legend tab allows you to control the location of the chart legend.



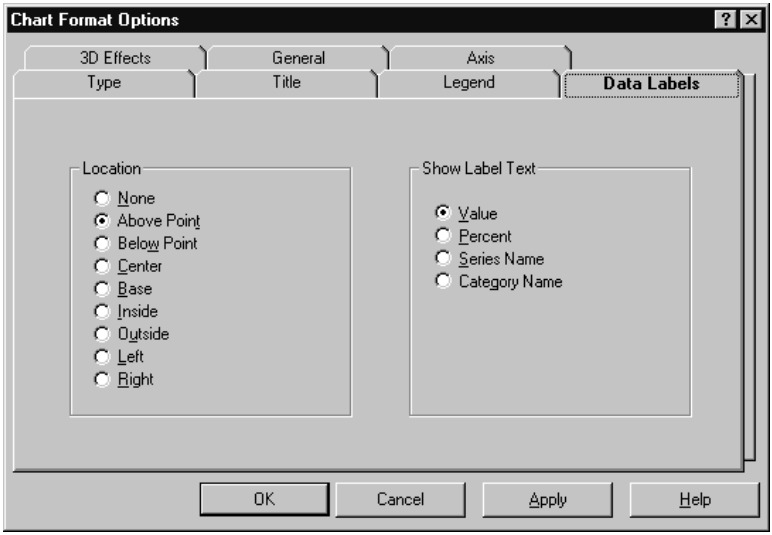
The available options on the Legend tab are as follows:

- **Visible** check box—allows you to display or not display report legends.
- **Location** of legend—if you elect to have report legends visible, you can select where the legend displays. The available options are **Top Left**, **Top** (center), **Top Right**, **Left**, **Right**, **Bottom Left**, **Bottom** (center), and **Bottom Right**.

NOTE:
Since legends take up space, the drawn chart will be smaller if you have selected Visible. If you wish to increase the size of the chart, do not select the Visible option.

Data Labels Tab

The Data Point Labels tab allows you to control the location of the data point labels.



The following parameters can be specified:

- **None**—labels are not displayed.
- **Above Point**—displays the label above the data point. This location is valid only for bar, line, area, and step charts.
- **Below Point**—displays the label below the data point. This location is valid only for bar, line, area, and step charts.
- **Center**—displays the label centered on the data point. This location is valid only for bar, line, area, and step charts.
- **Base**—displays the label along the category axis, directly beneath the data point. This location is valid only for bar, line, area, and step charts.
- **Inside**—displays the label inside a pie slice. This location is valid only for pie charts.
- **Outside**—displays the label outside a pie slice. This location is valid only for pie charts.

- **Left**—displays the label at the left of a pie slice. This location is valid only for pie charts.
- **Right**—displays the label at the right of a pie slice. This location is valid only for pie charts.

If data point labels are displayed, you can specify that they include one of the following:

- **Value**—the value of the data point appears in the label.
- **Percent**—the value of the data point appears in the label as a percentage.
- **Series Name**—the series name is used to label the data point.
- **Category Name**—the category name is used to label the data point.

NOTE:
The position of data point labels can affect the readability of the chart. The label text may overlap in some situations, making it difficult or impossible to read the labels.

Minimizing Report Output Windows

To minimize a report window, select the minimize button, which is located in the upper right-hand corner of the window.

When a report output window is minimized, the report's icon displays. Depending on the category of the report, one of the following icons displays:

Icon	Report Type
	Agent Administration Reports
	Agent Real-Time, Historical, and Integrated Reports
	Call Center Administration Reports
	Dictionary Reports
	Exceptions Reports
	Maintenance Reports

Icon	Report Type
	Other, Queue/Agent, and Custom Real-Time and Historical Reports
	Split/Skill Real-Time, Historical, and Integrated Reports
	Trunk/Trunk Group Real-Time and Historical Reports
	VDN Real-Time, Historical, and Integrated Reports
	Vector Real-Time and Historical Reports

Minimized Report Thresholds

If Report Thresholds are enabled, real-time and integrated reports continue to update while they are minimized. If no Caution or Warning threshold condition is currently being met, the report's normal icon, as shown on the previous table, displays on the toolbar and in the system tray. If thresholds are being met, the report's icon on the toolbar remains the same, but the Caution or Warning threshold icon appears in the system tray.

The threshold icons are as follows:

Icon	Threshold Type
	Caution Threshold
	Warning Threshold

For more information on how the Supervisor icon in the system tray works, see Chapter 5, "Getting Started with *CentreVu* Supervisor."

Right Mouse Button Pop-Up Menus

The right mouse button pop-up menu is available only when running reports. When you click the right mouse button, a pop-up menu displays.

The menu that displays is dependent on the location of your cursor. It can include options from the **Edit**, **Format**, and **Tools** menus on the **Reports** menu bar. The applicable menu items for the input field are enabled. If a report object is not selected, a menu is not displayed when you hold down the right mouse button. To deselect a selected object, click anywhere else on the report.

NOTE:

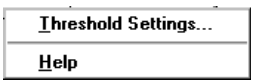
See the *CentreVu® Supervisor Version 8 Reports* (585-210-929) document for descriptions about these types of reports.

The right mouse button pop-up menu is available when you do any of the following actions:

- **Select a cell in a table and hold down the right mouse button** — a dotted border is drawn around the cell and the following menu displays:

  If you select a cell that displays an agent name, agent number, or work mode, the available drill-down reports for that cell display at the top of the right mouse button menu. See examples of these later in this section.

- **Select an output field or label and hold down the right mouse button—** a dotted border is drawn around the field and the following menu displays:



  The **Threshold Settings** menu item is enabled if the highlighted field has related threshold settings.

- **Select a data point in a chart and hold down the right mouse button—** the data point is highlighted using selection handles (dots along the edges of the data point) and the following menu displays:

If you select a data point that allows report threshold highlighting to be set, the menu item will not be grayed out.

- **Select an agent name or agent number in a table and hold down the right mouse button—**a dotted border is drawn around the agent name and the following menu displays:

If you do not have the EAS feature on your Enterprise Communications Server (ECS) or switch, the drill-down reports available will be the Real-Time Agent Information report and the Integrated Agent Information report.

From this menu, you can access either the Real-Time or the Integrated Agent Graphical Information report. If you double click on the agent name and you are running a real-time report, the default drill-down report is the Real-Time Agent Graphical Information report. For descriptions of the reports, see Chapter 3, “Real-Time Reports,” and Chapter 5, “Integrated Reports.”

NOTE:
You can change an agent's splits/skills while you are in a report using this method of selection. See the appropriate chapter in the *CentreVu® CMS R3V8 Administration* (585-210-910) document for more information.

- **Select a cell on a table or a point on a chart that displays agent work state information and hold down the right mouse button—** the data point is highlighted using selection handles (dots along the edges of the data point) and the following menu displays:

If you have the ECS or a switch with the EAS feature, the Real-Time AUX Agent drill-down report will also be available.

From this menu, you can access the Real-Time Split/Skill Work State Report, which also displays when you double click on a work state in the report.

- **Select a cell on a table or a point on a chart that displays Top Agent work state information and hold down the right mouse button —** the data point is highlighted using selection handles (dots along the edges of the data point) and the following menu displays:

If you have the ECS or switch with the EAS feature, the Real-Time AUX Agent drill-down report will also be available.

From this menu, you can access the Real-Time Split/Skill Top Agent Work State Report, which also displays when you double click on the work state in the report.

Rotating a 3D Chart

The rotation and elevation of any 3D chart can be changed interactively using the mouse. This is easier than using the 3D Effects tab of the Chart Format window (see "Formatting Chart Reports" on page 7-28 for information on using the 3D Effects tab). To change the rotation and elevation of a 3D chart, do the following:

1. Place the pointer over a 3D chart.
2. Press and hold the CTRL key. The pointer changes to indicate that the chart can be rotated.
3. Click and hold the left mouse button. A dotted 3D outline appears around the chart.
4. Move the pointer up and down to change the chart elevation, and left and right to change the chart rotation. The dotted 3D outline shows the position of the chart as you move the mouse.
5. When you find the rotation and elevation you want, release the mouse button. The chart is redrawn in the new position.

The 3D rotation and elevation of each chart is saved as part of the report view.

Exporting Report Data

You can export the data from both standard (table) and graphical (chart) reports, either to a file or to the *Windows* clipboard. Once you have exported report data, you can copy the report information into another application (for instance, a spreadsheet).

The **Script** button on the Data Export window displays the Save as Script dialog box, which lets you create a new script to run the selected report and then export it at a scheduled time.

NOTE:
By default, only the data from the chart or table is exported. You can select the **Include Labels and Headers** check box on the Export Data window to include that information in the export of data.

Reports are exported from *CentreVu* Supervisor in the following format:

- Data is exported as ASCII characters.
- For table reports, each row of data is written as one line, terminated by a carriage return (ASCII value 13).
- The field separator character is written between fields.
- The field separator does not follow the last character in the line.
- Text strings are delineated according to the specified text delimiter.

To export the data from a report, do the following:

1. Click on the table or chart within a report.
2. Select **Export Table Data** or **Export Chart Data** or **Export All Data**, as appropriate, from the **Edit** menu or the right mouse button pop-up menu.

3. The Export Data window appears. The Export Data window allows you to copy the data from a report to the clipboard or a file.

4. Complete the following parts of the Export Data window:

- **Destination selection box**—choose to export the report to the clipboard or to a file. If you are exporting the report to a file, you can:

  —Type in a name for the file.

  —Select the **File** button to browse the files on your PC.

  —Use the history list to select a file you previously used.

- **Export Format selection box**—define the export format of the report. The character you choose from the drop-down list in the Field Separator box is what will be placed between each field in the report.

  The character you choose for the Text Delimiter determines what is used around text strings in the exported file. If a text delimiter is specified, no special checks are done to ensure that the data does not contain that character, and the data is written unmodified.

  If you want to export data to *Microsoft* Excel, choose "Tab" as the field separator and "None" as the text delimiter.

- **Export Null Values as Zero**—select this check box to include data that is null as a zero in the export of information. This is helpful if you are exporting a table report because a null value that is not included in the export of the data could disrupt the order of the rows/columns in the data.

- **Include Labels and Headers check box**—select this check box to include the text information (such as column headers in table reports) in the export of the report's data.

- **Export Time Durations in Seconds**—select this check box to include the time duration in the export of information.

5. If you want to automatically export data at a scheduled time, select the **Script** button to display the Save as Script dialog box, which lets you create a script to export the data from the report and then exit the report.

Copying Chart Reports

You can copy chart reports to the *Windows* clipboard. The copy of the selected chart report is copied to the clipboard in the *Microsoft Windows* metafile (*.wmf) format. This allows you to paste the chart image into any *Windows* application that can read the metafile format. For instance, you can copy chart reports and import the files into word processing files to be used as viewgraphs.

To copy a chart report to the metafile format, do the following:

1. Run a chart (graphical) report.
2. Select the image that you want to copy by clicking on it.
3. Select **Copy** from the **Edit** menu, or use the right mouse button menu to select **Copy**.

The chart you selected is copied to the clipboard.

Resizing Report Windows

You can resize report windows by moving the cursor to the edge of the window and, when the resize arrow appears, holding down the left mouse button and moving the mouse to size the window. When the window is the size you want, release the mouse button.

You can also use the maximize and minimize buttons at the top of the window to size the window.

When you resize a Supervisor report output window, the resulting effect depends on the type of report (standard CMS or graphical) you are running. The following paragraphs outline the effects of resizing each type of report window.

Standard CMS Reports

When you resize the window of a standard report, the contents of the window do not change in size to reflect the new window size.

If you made the window smaller than the size of the report, scroll bars will appear to allow you to view the entire contents of the report.

Graphical Reports

When you resize the window of a graphical report, the contents of the window will change in size to reflect the new window size.

If a window is made too small, some elements may shrink in such a way to become unreadable. If this happens, resize the window to a more appropriate size. You may also choose to turn chart legends or data labels off to make more room for the chart itself.

The window size is saved as part of the report view.

Changing Column Widths

You can change the width of an individual table column in a table or chart report by positioning the mouse pointer on the vertical line between the column headers. The pointer will change to indicate that a resize is possible, and you can then drag the mouse to change the column size.

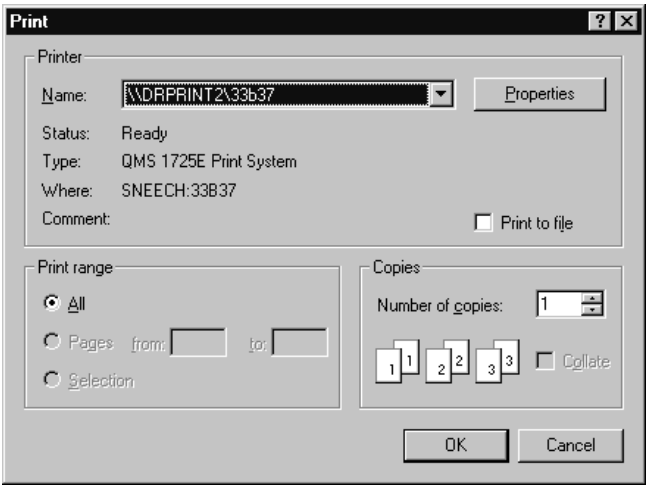
Selecting a Printer

The Print window is a standard *Windows* feature.

To access the Print window, do the following:

1. Select a report (from **Reports**, **Dictionary**, **Exceptions**, **Call Center Administration**, or **Maintenance**).
2. On the report input window, select the **Print** button , or select **Print** from the **Report** menu.

   The Print window displays.



The default printer is listed in the **Name** field. To select another printer, click on the down arrow after the field to display a drop-down list of installed printers. You can choose any printer that has been installed in the *Windows* Control Panel. Depending on what printers are installed, non-printer devices such as files and fax may appear here. To print to a file, you must check the **Print to file** box.

Other entries in this **Printer** box (**Status**, **Type**, **Where**, and **Comment**) will vary depending on the chosen printer. The *Windows* system software determines what is available here.

Using Page Setup

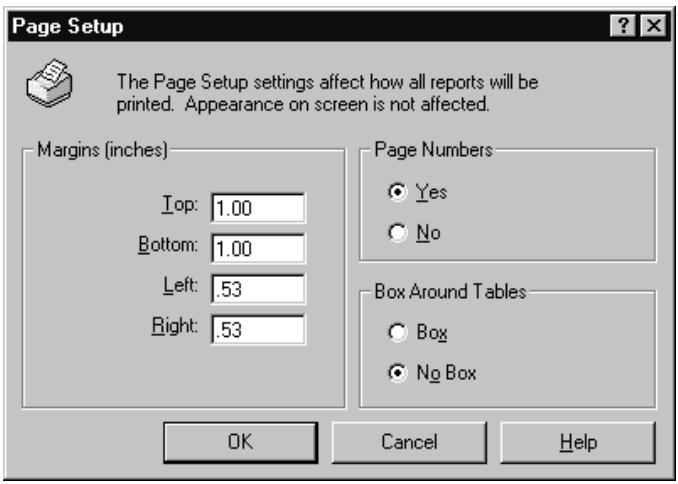
The Page Setup window allows you to specify how each page of a report is positioned when printed. The changes you make in this window apply only to printed reports and do not affect reports displayed on-screen.

The Page Setup window for printing options is a standard *Windows* feature.

To access the Page Setup window, do the following:

1. Select a report (from **Reports**, **Dictionary**, **Exceptions**, **Call Center Administration**, or **Maintenance**).
2. Complete the report input window, selecting **View Report On Screen** as the destination.
3. Select **OK** to run the report.
4. Once the report is running, select **Page Setup** from the **Report** menu.

   The Page Setup window displays.



The following options are available in the Page Setup window:

- **Margins**—lets you define the spaces at the edges of the page where nothing will be printed. The margin settings are defined as follows:
  - **Top**—the margin is measured from the top of the page. The report is offset by this amount at the top of each page.
  - **Bottom**—the margin is measured from the bottom of the page. When a printed table reaches the bottom of the page, it will continue printing at the top of the next page, with the table titles repeated. If a chart would overlap the bottom margin, it is scaled smaller so that it fits within the margin. Text that reaches the bottom of the page is printed on the next page.
  - **Left**—the margin is measured from the left of the page. The report is offset by this amount on the left of each page.
  - **Right**—the margin is measured from the right of the page. Tables and text that are too wide to fit on the printed page are truncated at the right margin. Charts that would overlap the right margin are scaled smaller to fit within the margin.
- **Page Numbers**—lets you choose whether or not to display page numbers. The following settings are valid:
  - **Yes**—page numbers will be displayed.
  - **No**—page numbers will not be displayed. This is equivalent to the way CMS currently prints reports.
- **Box Around Tables**—allows you to choose whether or not to display a box around report tables when printed. The following settings are valid:
  - **Box**—boxes will be displayed.
  - **No Box**—boxes will not be displayed.

Setting Report Threshold Highlights

Report threshold highlights let you set visual flags to notify you when a real-time data item is out of acceptable bounds. This feature enables you to run a report minimized and be notified (through color/icon changes) when an item has passed a specific threshold.

You can set threshold highlights for only real-time data items in real-time or integrated reports. The threshold highlights you set will tell you when data for an entity (split/skill, agent, agent group, or VDN) has reached a certain level (threshold), as defined by you.

Threshold highlight settings apply to a single entity on a specific ACD. For example, if you run a real-time split report for split 17 on ACD 1 and set the threshold highlights, the threshold settings apply to split 17 on ACD 1 for all reports you run for that split and ACD. Also, the threshold highlight settings are saved on the PC you are currently using. So, if you move to another PC, you need to set up the threshold highlights on that PC. If multiple users log into the same PC, each user's threshold highlight settings are saved individually.

By default, the thresholds for each report are turned on, but the threshold highlight settings are empty and the sample size threshold is zero. Therefore, no threshold highlights show on any reports until you create them using the Threshold Settings window. You can turn thresholds on and off for each report by selecting/deselecting the **Thresholds Settings** check box in the report input window, or by selecting **Threshold Settings** from the **Options** menu in the report output window.

An example of setting report threshold highlights is to set thresholds for Time on ACD Calls in the skill named Sales. You might set the High Caution threshold to 50 seconds and the High Warning threshold to 60 seconds. If an agent spends more than 50 seconds, but less than 60 seconds, on an ACD call in the Sales skill, the item on the report will highlight with the High Caution threshold color. If the time exceeds 60 seconds, the item on the report will highlight with the High Warning threshold color. However, if the agent spends more than 50 seconds on an ACD call in any other skill (that does not have the same thresholds), the item on the report will not display any threshold highlighting.

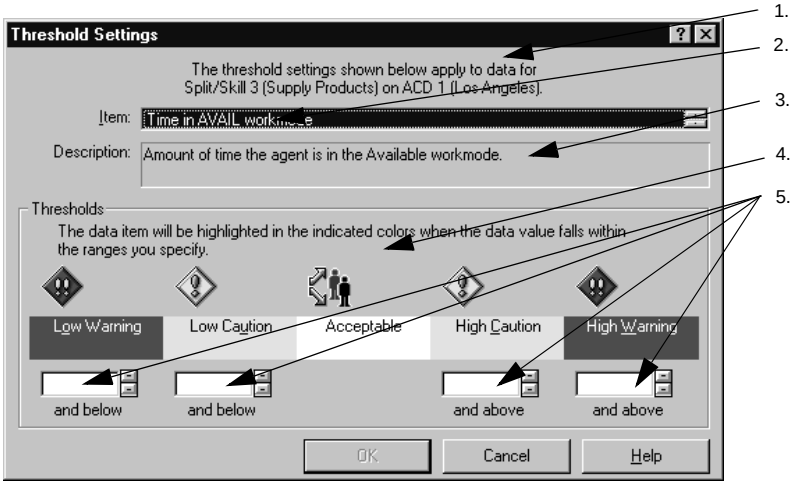
NOTE:
Report threshold highlights are not the same as CMS Exceptions Thresholds. The threshold highlighting you can do with this feature is available through the Supervisor interface only.

To set report threshold highlights do the following steps:

1. Run a report that contains real-time data (a real-time or integrated report)
2. Select on a data item in the report for which you can set threshold highlights

   NOTE:
   When a data item/items for which threshold highlights can be set is selected, the **Threshold Settings** menu item is enabled. When the data item that is selected does not allow thresholds, an error message will display. See the tables later in this section for a list of the report outputs that allow threshold highlighting.
3. Select **Threshold Settings** from the right mouse button or from the **Tools** menu.

4. Complete the Threshold Settings window:



1. Data Item Threshold Definition
2. Item
3. Description
4. Icons
5. Thresholds

NOTE:
Depending on which data item you have selected, the Sample Size box at the bottom of the Threshold Settings window may or may not be visible. If you selected a data item that is a percentage or an average, the Sample Size box is present.

The Threshold Settings window includes the following information and text boxes:

- **Item** — shows the name of the report threshold that applies to the selected data value. In most cases, this box contains a single entry. If the data value is agent “Time in State” or “Time in Workmode,” or agent group “Time in State” or “Time in Workmode,” then this list box contains multiple names, one for each possible agent state or workmode. Threshold highlights can be set for each individual state and workmode.

- **Description** — shows a description of the threshold currently selected.
- **Thresholds** — shows the colors (as defined in the **Options** Threshold Colors tab, accessed from the **Tools** menu), icons, and current numerical settings for the threshold highlights of this item. For thresholds that are time-related, the numbers you enter are in seconds. For example, if you are entering a High Caution threshold for three minutes, type 180 (for 180 seconds) in the High Caution field.
  - **Low Warning** — contains the current value for the Low Warning threshold for the selected data item. If no value is defined, the field is blank. You can set the value to any positive integer from 0 to 999,999,999 or leave it blank. If the field is blank, no threshold is set.
  - **Low Caution** — contains the current value for the Low Caution threshold for the selected data item. If no value is defined, the field is blank. You can set the value to any positive integer from 0 to 999,999,999 or leave it blank. If the field is blank, no threshold is set.
  - **High Caution** — contains the current value for the High Caution threshold for the selected data item. If no value is defined, the field is blank. You can set the value to any positive integer from 0 to 999,999,999 or leave it blank. If the field is blank, no threshold is set.
  - **High Warning** — contains the current value for the High Warning threshold for the selected data item. If no value is defined, the field is blank. You can set the value to any positive integer from 0 to 999,999,999 or leave it blank. If the field is blank, no threshold is set.
- **Sample Size** — contains the current value for the Sufficient Sample Size value. You can set this to any value from 0 to 999. When you set Sufficient Sample Size value, you are defining a minimum number of items that must be currently tracked before the threshold highlighting is enabled. You will only see Sample Size if the data item you selected is a percentage or an average.

5. Select **OK**.

Tips for Setting Report Threshold Highlights

Keep the following tips in mind when you are setting report threshold highlights.

- Before you can administer threshold highlights for a data item, you must first click on the data item in the report to select it. When a data item is highlighted in a table (standard) report, it is outlined with a dotted line. When a data item is highlighted in a chart (graphical) report, it has "pull-bars" around the perimeter.
- See the "Available Agent Threshold Settings," "Available Split/Skill Threshold Settings," and "Available VDN Threshold Settings" sections in this chapter for more information on the real-time data items in reports for which you can set threshold highlights.
- In standard reports, you can select items from the table or from the output information at the top of the report.
- In chart reports, you can select items from the pie charts, bar charts, graphical reports, or tables.
- When you set threshold highlights for an entity (split/skill, agent, agent group, or VDN), that set of threshold highlights applies to every report that is run specifically for that entity.
- The report threshold highlights are updated with each refresh of the report, but not between report refreshes.
- The numbers you define for the threshold highlights must increase from left to right (the number you use for Low Warning must be less than the number you use for High Warning).
- You can set the label colors by choosing **Options** from the **Tools** menu on the Controller. Depending on how you define the colors, the sample size threshold can behave in the following ways:
  - If you want to be alerted to the fact that a particular calculation is not statistically significant, set the **Insufficient** color to a different color than any other threshold condition. This causes data with insufficient sample size to be highlighted in a special color.

— If you want to ignore values with insufficient sample sizes, set the **Insufficient** color to be black text on a gray background. This causes the value with insufficient sample size to not be highlighted.

- Setting report threshold highlights affects how report data is displayed in the following ways:

  — If the data calculation contains a non-zero Sample Size threshold, the denominator of the specified calculation is compared to the Sample Size threshold. If the denominator is less than the Sample Size threshold, the value displays in the “Insufficient” color, indicating that the sample size is insufficient for the value to be significant.

  — If the sample size is sufficient or if there is no sample size associated with the data, then the data value is compared to the Low Warning, Low Caution, High Caution, and High Warning threshold values to determine which band applies. The value is displayed in the color associated with the appropriate threshold.

Available Agent Threshold Settings

All of the data that *CentreVu* Supervisor uses for agent threshold highlights are retrieved from the `cagent` (current interval agent) database table. See the *CentreVu® CMS R3V8 Database Items and Calculations* (585-210-939) document for more information on the database tables. The agent threshold highlights you can set are as follows:

Threshold	Description/Database Item or Calculation
Time in AUX State	*Description* — Amount of time the agent is in the Auxiliary Work state. *Measures* — DURATION while AGSTATE = AUX
Time in AUX-IN State	*Description* — Amount of time the agent is on an incoming call while in the Auxiliary Work state. *Measures* — DURATION while AGSTATE = AUX-IN
Time in AUX-OUT State	*Description* — Amount of time the agent is on an outgoing call while in the Auxiliary Work state. *Measures* — DURATION while AGSTATE = AUX-OUT
Time in ACW State	*Description* — Amount of time the agent is in the After Call Work state. *Measures* — DURATION while AGSTATE = ACW
Time in ACW-IN State	*Description* — Amount of time the agent is on an incoming call while in the After Call Work state. *Measures* — DURATION while AGSTATE = ACW-IN
Time in ACW-OUT State	*Description* — Amount of time the agent is on an outgoing call while in the After Call Work state. *Measures* — DURATION while AGSTATE = ACW-OUT

Threshold	Description/Database Item or Calculation
Time in AVAIL State	*Description* — Amount of time the agent is in the AVAIL state. *Measures* — DURATION while AGSTATE = AVAIL.
Time in ACD State	*Description* — Amount of time the agent is in the ACD state. *Measures* — DURATION while AGSTATE = ACD
Time in ACD-IN State	*Description* — Amount of time the agent is in the ACD-IN state. *Measures* — DURATION while AGSTATE = ACD-IN
Time in ACD-OUT State	*Description* — Amount of time the agent is in the ACD-OUT state. *Measures* — DURATION while AGSTATE = ACD-OUT
Time in DACD State	*Description* — Amount of time the agent is in the DACD state. *Measures* — DURATION while AGSTATE = DACD
Time in DACD-IN State	*Description* — Amount of time the agent is in the DACD-IN state. *Measures* — DURATION while AGSTATE = DACD-IN
Time in DACD-OUT State	*Description* — Amount of time the agent is in the DACD-OUT state. *Measures* — DURATION while AGSTATE = DACD-OUT
Time in DACW State	*Description* — Amount of time the agent is in the DACW state. *Measures* — DURATION while AGSTATE = DACW

Threshold	Description/Database Item or Calculation
Time in DACW-IN State	*Description* — Amount of time the agent is in the DACW-IN state. *Measures* — DURATION while AGSTATE = DACW-IN
Time in DACW-OUT State	*Description* — Amount of time the agent is in the DACW-OUT state. *Measures* — DURATION while AGSTATE = DACW-OUT
Time in RING State	*Description* — Amount of time the agent is in the RING state. *Measures* — DURATION while AGSTATE = RING
Time AUX Workmode	*Description* — Amount of time the agent is in the AUX workmode, including incoming and outgoing calls. This time measures the time the agent remains in AUX, regardless of any incoming or outgoing calls handled. *Measures* — AGTIME while WORKMODE = AUX.
Time in ACD Workmode	*Description* — Amount of time the agent is in the ACD workmode, including incoming and outgoing calls. This time measures the time the agent remains in ACD, regardless of any incoming or outgoing calls handled. *Measures* — AGTIME while WORKMODE = ACD
Time in ACW Workmode	*Description* — Amount of time the agent is in the ACW workmode, including incoming and outgoing calls. This time measures the time the agent remains in ACW, regardless of any incoming or outgoing calls handled. *Measures* — AGTIME while WORKMODE = ACW

Threshold	Description/Database Item or Calculation
Time in AVAIL Workmode	*Description* — Amount of time the agent is in the AVAIL workmode, including incoming and outgoing calls. This time measures the time the agent remains in AVAIL, regardless of any incoming or outgoing calls handled. *Measures* — AGTIME while WORKMODE = AVAIL
Time in DACD Workmode	*Description* — Amount of time the agent is in the DACD workmode. This time measures the time the agent remains in DACD, regardless of any incoming or outgoing calls handled. (Applies only to Generic 3 switches.) *Measures* — AGTIME while WORKMODE = DACD
Time in DACW Workmode	*Description* — Amount of time the agent is in the DACW workmode, including incoming and outgoing calls. This time measures the entire time the agent remains in DACW, regardless of any incoming or outgoing calls handled. *Measures* — AGTIME while WORKMODE = DACW
Calls in Direct Agent Queue	*Description* — Number of Direct Agent calls that are queued to the agent. DA_INQUEUE is the current number of Direct Agent calls waiting in any split/skill queue for a specific agent. (Applies only to Generic 3 switches.) *Measures* — DA_INQUEUE
Time call waiting in Direct Agent Queue	*Description* — Amount of time the caller has waited in the Direct Agent queue. DA_OLDESTCALL is the length of time that the oldest Direct Agent call has waited in any split/skill queue for this agent. (Applies only to Generic 3 switches.) *Measures* — DA_OLDESTCALL

Threshold	Description/Database Item or Calculation
Average talk time[a]	*Description* — Average length of time the agent spends talking on ACD calls. *Measures* — AVG_AGENT_TALK_TIME calculation.

a. Sample Size thresholds apply.

Available Split/Skill Threshold Settings

All of the data that *CentreVu* Supervisor uses for split/skill threshold highlights are retrieved from the `csplit` (current interval split) database table. See the *CentreVu® CMS R3V8 Database Items and Calculations* (585-210-939) document for more information on the database tables. The split/skill threshold highlights you can set are as follows:

Threshold	Description/Database Item or Calculation
Oldest Call Waiting	*Description* — Amount of time the oldest call to this split/skill has waited in queue. OLDESTCALL is the number of seconds the oldest split/skill ACD call has waited in queue or ringing. *Measures* — OLDESTCALL
Number of Calls Waiting in Queue	*Description* — Number of calls queued to this split/skill. The computation measures the number of calls in queue or ringing at an agent position. *Measures* — INQUEUE + INRING
Number of Calls Abandoned	*Description* — Number of calls that were queued to this split/skill and then abandoned. ABNCALLS is the number of calls offered to a split/queue which were subsequently abandoned by the caller. *Measures* — ABNCALLS
Average Speed of Answer[a]	*Description* — Number of seconds, on average, before a call to this split/skill is answered. Average speed of answer is the ANSTIME (time spent by callers in queue or ringing before being answered) divided by the ACDCALLS (number of calls queued to the split/skill that were answered by an agent at this split/skill). *Measures* — AVG_ANSWER_SPEED

Threshold	Description/Database Item or Calculation
Average Talk Time[a]	*Description* —Average length of time spent on ACD calls to the split/skill. *Measures* — AVG_ACD_TALK_TIME
Average Time to Abandon[a]	*Description* — Average length of time callers waited before abandoning calls to the split/skill. *Measures* — AVG_ABANDON_TIME
Full-Time Equivalent Agents Staffed	*Description* — Number of total full-time equivalent agents currently staffed for the skill. *Measures* — FTE_AGENTS
Number of Calls Forced Busy	*Description* — Number of calls to the split/skill that were given a busy signal by the switch. *Measures* — BUSYCALLS
Number of Calls Disconnected	*Description* — Number of calls to the split/skill that were disconnected by the switch. *Measures* — DISCCALLS
Percent of Calls Answered in Service Level[a]	*Description* — Percentage of ACD calls to the split/skill that were answered within the service level. *Measures* — PERCENT_SERV_LVL_SPL
Percent of Calls Abandoned[a]	*Description* — Percentage of ACD calls to the split/skill that were abandoned. *Measures* — PERCENT_CALL_ABAN
Number of Agents Staffed	*Description* — Number of agents logged into the split/skill. *Measures* — STAFFED
Percent of Calls Answered*	*Description* — Percent of ACD calls offered to the split/skill that were answered. *Measures* — PERCENT_CALL_ANS

Threshold	Description/Database Item or Calculation
Call Profile Abandon per Service Level Increment	*Description* — Number of abandoned calls to the split/skill for any service level increment. A single report threshold applies to all of the values. If the number of abandoned calls for the split/skill reaches the threshold for any of the service level increments, the value for that service level increment is highlighted. *Measures* — ABNCALLS1 through ABNCALLS10
Rolling Average Speed of Answer	*Description* — Switch-based Rolling Average Speed of Answer for this split/skill. The Rolling Average Speed of Answer is the average speed of answer across intervals. *Measures* — ASA
Expected Wait Time (Low)	*Description* — Expected Wait Time for a call queued to this split/skill at a low priority level. *Measures* — EWTLOW
Expected Wait Time (Medium)	*Description* — Expected Wait Time for a call queued to this split/skill at medium priority level. *Measures* — EWTMEDIUM
Expected Wait Time (High)	*Description* — Expected Wait Time for a call queued to this split/skill at high priority level. *Measures* — EWTHIGH
Expected Wait Time (Top)	*Description* — Expected Wait Time for a call queued to this split/skill at top priority level. *Measures* — EWTTOP

a. Sample Size thresholds apply.

Available VDN Threshold Settings

All of the data that *CentreVu* Supervisor uses for VDN threshold highlights are retrieved from the cvdn (current interval VDN) database table. See the *CentreVu® CMS R3V8 Database Items and Calculations* (585-210-939) document for more information on the database tables. The VDN threshold highlights you can set are as follows:

Threshold	Description/Database Item or Calculation
Number of Calls Abandoned During the Interval	*Description* — Number of calls that were queued to this VDN and then abandoned. *Measures* — ABNCALLS
Number of Calls Forced Busy During the Interval	*Description* — Number of calls to the VDN that were given a busy signal by the switch. *Measures* — BUSYCALLS
Number of Calls Disconnected During the Interval	*Description* — Number of calls to the VDN that were disconnected by the switch via the vector "disconnect" command. *Measures* — DISCCALLS
Oldest Call Waiting	*Description* — Number of seconds the oldest call has waited in this VDN. *Measures* — OLDESTCALL
Number of Calls Waiting	*Description* — Number of calls queued to this VDN that have not been answered by an agent. *Measures* — INPROGRESS - ATAGENT
Percent of Calls Answered in Service Level[a]	*Description* — Percentage of ACD calls to the VDN that were answered within the service level. *Measures* — 100*(ACCEPTABLE / INCALLS)
Percent of Calls Abandoned[a]	*Description* — Percentage of ACD calls to the VDN that were abandoned. *Measures* — 100*(ABNCALLS / INCALLS)

Threshold	Description/Database Item or Calculation
Percent of Calls Answered[a]	*Description* — Percentage of ACD calls offered to the VDN that were answered. *Measures* — 100[a] [(ACDCALLS + CONNECTCALLS) / INCALLS]
Call Profile Abandon per Service Level Increment	*Description* — Number of abandoned calls to this VDN for any service level increment. A single report threshold applies to all of the values. If the number of abandoned calls for the VDN reaches the threshold for any of the service level increments, the value for that service level increment is highlighted. *Measures* — ABNCALLS1 through ABNCALLS10
Average Speed of Answer[a]	*Description* — Number of seconds, on average, before a call to this VDN is answered. This value is the time callers spent in queue or ringing before being answered, divided by the number of calls queued to the VDN that were answered by an agent at this VDN. *Measures* — AVG_ANSWER_SPEED
Average Talk Time[a]	*Description* — Average length of time spent on ACD calls to the VDN. *Measures* — AVG_ACD_TALK_TIME
Average Time to Abandon[a]	*Description* — Average length of time callers waited before abandoning calls to the VDN. *Measures* — AVG_ABANDON_TIME
Rolling Average Speed of Answer	*Description* — Switch-based Rolling Average Speed of Answer for this VDN. The Rolling Average Speed of Answer is the average speed of answer across intervals. *Measures* — ASA

a. Sample Size thresholds apply

Report Options

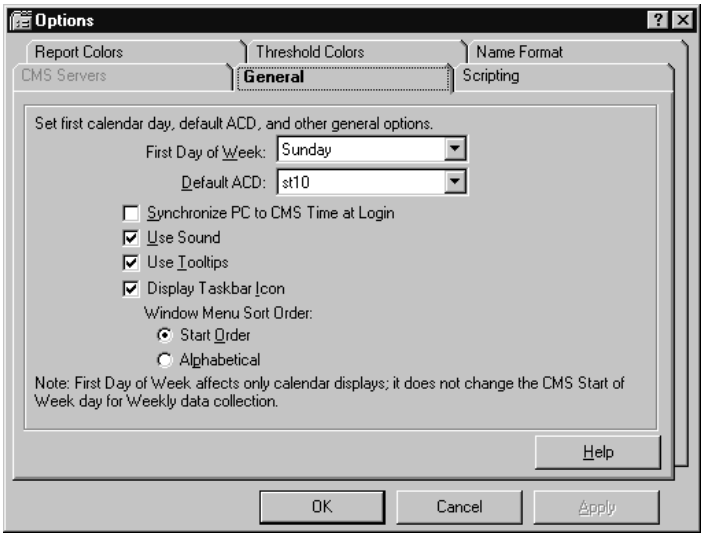
Use the **Options** tab to do the following actions:

- Set the ACD and other general options that Supervisor will default to when you log in (General tab).
- Set up the colors that will be used in your graphical reports (Report Colors tab).
- Set up the colors that will be used in reports to tell you when threshold highlights (not exceptions thresholds) have been reached. See "Setting Report Threshold Highlights" in this chapter for more information on threshold highlights.
- Choose or create a name format using {name} for Dictionary Name, {entity} for entity type, and {number} for entity number. The name format determines how items will be displayed in reports. For instance, if you select the name format of {entity}{number}, then all of the entities (splits/skills, ACDs, VDNs, vectors, trunks, trunk groups, call work codes, and AUX codes) that can be named in the Dictionary will display as the entity type and number instead of the Dictionary name. If you selected {name} as the name format, then the names that have been assigned to the entities in the Dictionary will display.

Options General Tab

NOTE:
The General tab is accessible when you *are* connected to a CMS server.

The following graphic shows the **Options** General tab (with default settings).



Use the General tab to set your first calendar day, default ACD, and other general options. The options are described below.

- **First Day of Week —** this option affects only how the calendar displays; it does not change the CMS Start of Week day for weekly data collection (the CMS Start of Week day is set through the System Setup—Storage Intervals window). For example, if you browse for a date, the calendar will start the week based on the day that you choose.

  Use the drop-down list to make your selection.

- **Default ACD —** when you select the ACD, this ACD will be the default listed in the functions windows and drop-down list options.

  Use the drop-down list to make your selection.

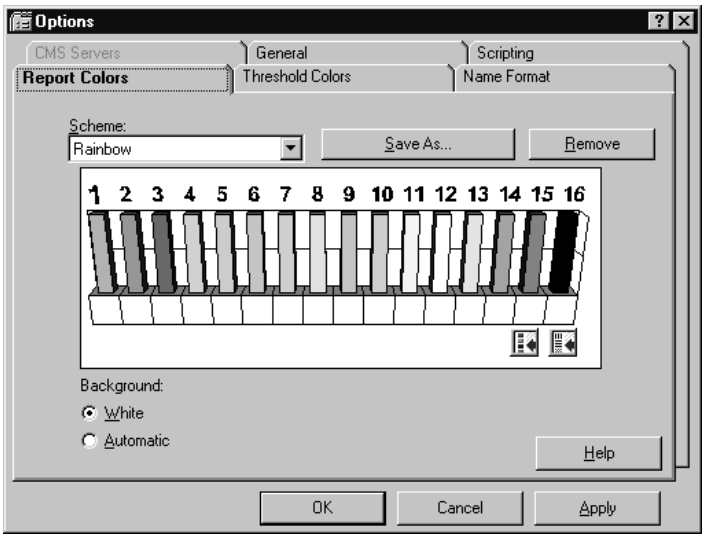
- **Synchronize PC and CMS Time at Login —** activate the check box for this selection to set the PC's clock to read the same time as the CMS clock. If you do not activate this selection, your PC clock and the CMS clock may not read the same time. This does not affect the CMS clock.
- **Use Sound —** activate the check box for this selection to be alerted, by sound, when the **Exceptions Indicator** box is updated. The **Exceptions Indicator** box is on the Controller status bar. The sound you hear is the sound you have chosen for the exclamation event associated with your PC.

  NOTE:
  Threshold Highlighting does not use sound. It uses color only as an indicator of a threshold being met.
- **Use Tooltips —** activate the check box for selection to make tooltips visible. For example, when you are working on the Controller window, you may place your mouse cursor over a toolbar button and a yellow box will appear with a brief description of that button.
- **Use Taskbar Icon —** activate the check box for this selection to use the Supervisor system tray icon feature. See Chapter 2, "Supervisor Basics," for more information on using the Supervisor system tray icon.
- **Window Menu Sort Order** —if you activate the Use Tray Icon, you need to determine how the items that display in the system tray icon menu will be sorted.
  - **Start Order** — select this radio button and the items in the system tray icon menu will display in the order in which you started them from Supervisor.
  - **Alphabetical** — select this radio button and the items in the system tray icon menu will display in alphabetical order, regardless of the order in which you started them.

Options Report Colors Tab

NOTE:
The Report Colors tab is accessible when you *are* connected to a CMS server.

The following graphic shows the **Options** Report Colors tab (with default settings).



Use the Report Colors tab to set up the colors that will be used in your graphical reports.

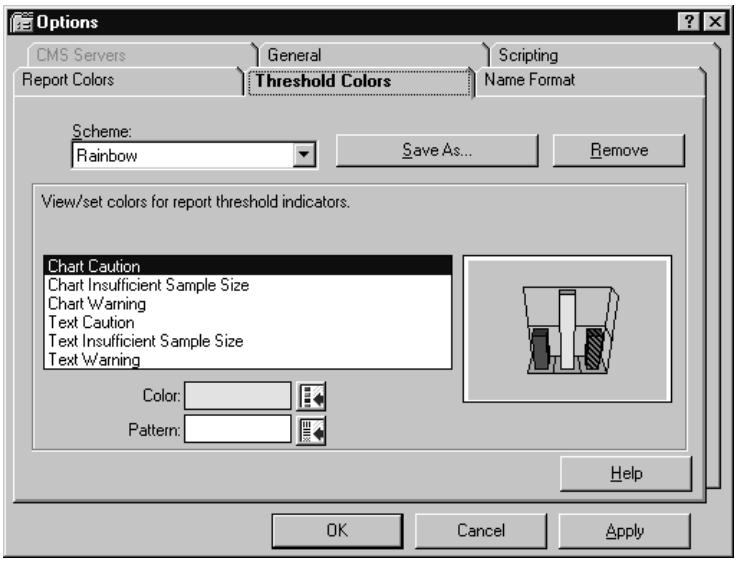
- **Scheme** — You can select the report color scheme that you want to use for Supervisor reports in one of two ways:
  - — From a series of predefined color schemes, which are listed in the **Scheme:** field. Use the drop-down list to select a different scheme from the one that is currently displayed.
  - — By creating a new color scheme. See the “Creating a New Report Color Scheme” section in this chapter for instructions on creating report color schemes.

- **Background** — Supervisor gives you two choices for the background color of reports:
  - — **White** — Select this radio button to make the background of all reports white.
  - — **Automatic** — Select this radio button to make the background of all reports match the color that you have set up for your system in *Windows*.

Options Threshold Colors Tab

NOTE:
The Threshold Colors tab is accessible when you *are* connected to a CMS server.

The following graphic shows the **Options** Threshold Colors tab (with default settings).



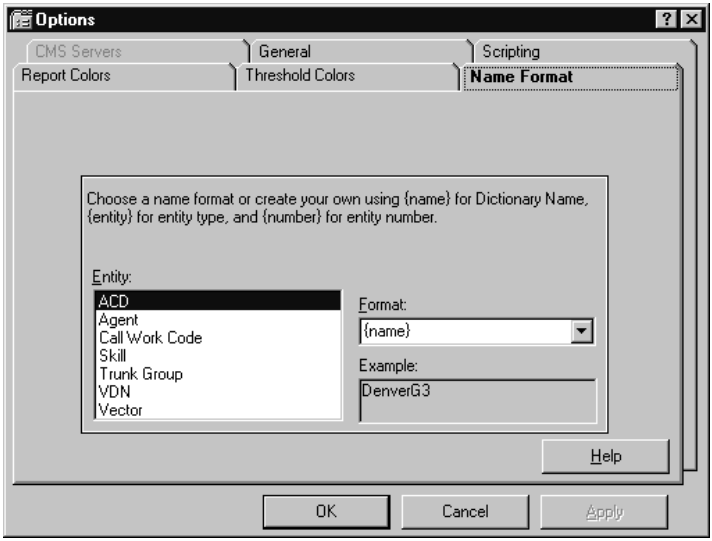
Use the Threshold Colors tab to set up the colors that will be used in reports to tell you when exceptions thresholds have been reached. You can select report color schemes in the following ways:

- From a series of predefined color schemes, which are listed in the **Scheme:** field. Use the drop-down list to select a different scheme from the one that is currently displayed.
- By creating a new color scheme. See the "Creating a New Threshold Color Scheme" section in this chapter for instructions on creating report color schemes.

Options Name Format Tab

NOTE:
The Name Format tab is accessible when you *are* connected to a CMS server.

The following graphic shows the **Options** Name Format tab (with default settings).



Use the Name Format tab to choose or create formats for how CMS entities (splits/skills, ACDs, VDNs, vectors, trunks, trunk groups, call work codes, and AUX codes) will display in Supervisor. The display can be set to any one or a combination of {name} for Dictionary Name, {entity} for entity type, and {number} for entity number.

To define the name format for entities, do the following steps:

1. Select the item that you want to set formats for from the **Entity** box.
2. In the **Format** text box, you can do either of the following actions:
   - Type the format that you want ({name}, {entity}, and/or {number}), or
   - Use the drop-down list to choose from a set of preformatted options.

     For example, if you want to display agent names and extension numbers on reports, enter {name} {number} in the **Format** box.

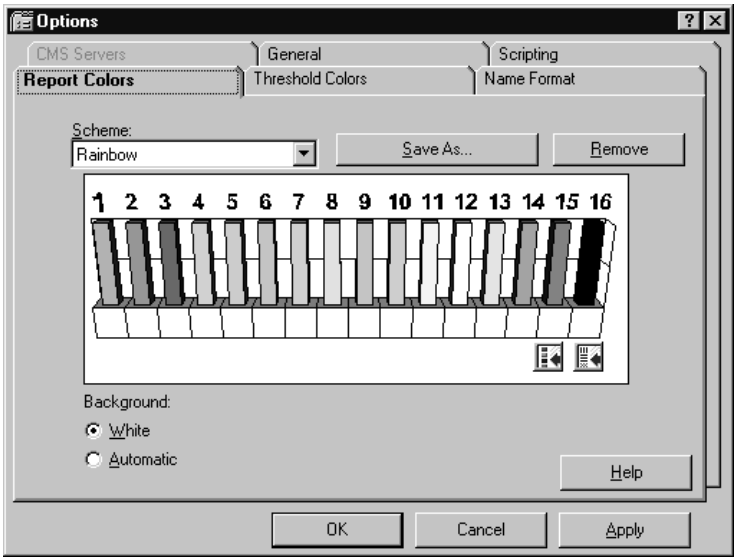
     The **Example** box provides an example of what the format will look like based on your current definition of the name format.
3. Select **OK** to save your changes. Select Cancel to clear your changes.

Creating a New Report Color Scheme

To create a new color scheme for reports, do the following steps:

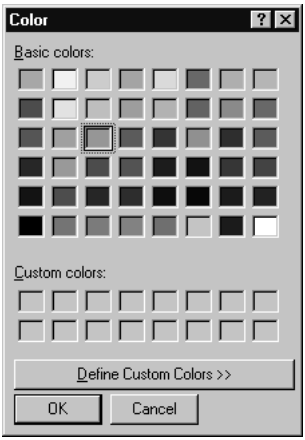
1. Choose **Options** from the **Tools** menu, or select the **Options** button on the toolbar.
2. Select the Report Colors tab.
3. Select the color scheme with which you want to begin from the Scheme: drop-down list.

The view of the scheme displays:

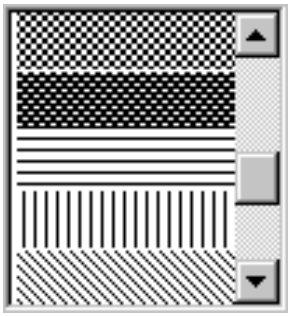


4. Choose the **Background** color for reports by selecting **White** or **Automatic**.
5. Click on the color bar (1 through 16) you want to modify.
6. Select either the **Color Selector** or the **Pattern Selector** button.

If you select the **Color Selector** button, the following window displays:



If you select the **Pattern Selector** button, the following box displays:



7. To select a new color, choose from the Basic colors palette, or create a custom color using standard *Windows* procedures.

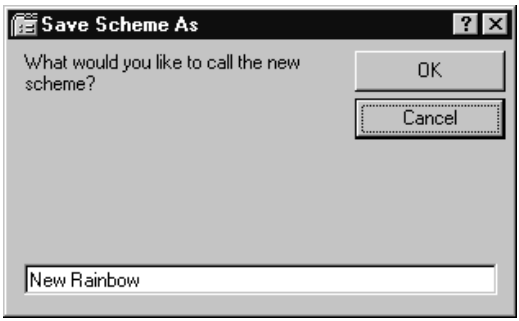
   To select a new **pattern**, click on the pattern you want to use.

8. Repeat steps 5 through 7 until you have updated all of the color bars that you want to modify.

WARNING:
If you do not save the new color scheme using the **Save As** button, the changes that you have made will overwrite the default color scheme that you modified.

9. When you are done modifying color bars, select Save As.

   The following window displays:



10. Type the name of the report color scheme that you created in the text box.
11. Select **OK** to save the scheme and the scheme name.

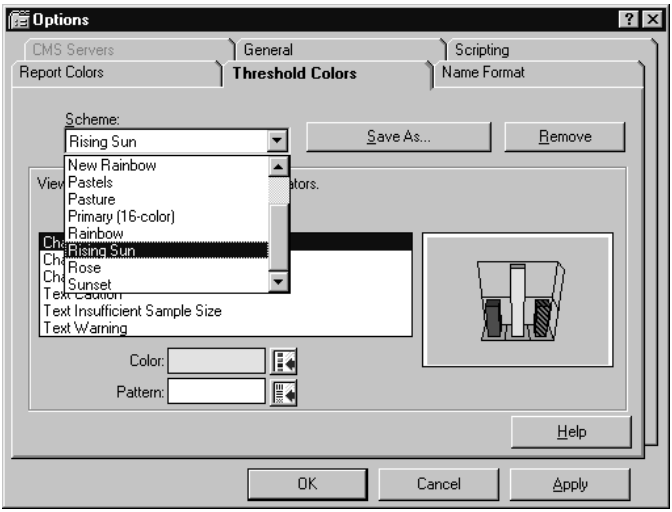
NOTE:
You can view the changes that you made to a color scheme at any point in the modification by selecting Apply. When you do this, the current color scheme is applied to any reports that are running.

Creating a New Threshold Color Scheme

To create a new threshold color scheme for reports, do the following steps:

1. Choose **Options** from the **Tools** menu, or select the **Options** button on the toolbar.
2. Select the Threshold Colors tab.
3. Select the color scheme with which you want to begin from the Scheme: drop-down list.

   The view of the scheme displays:

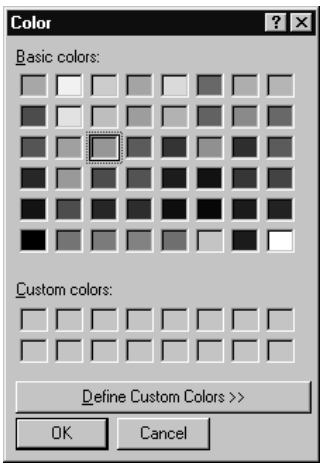


4. Select the element of threshold highlighting that you want to modify colors for from the list box (Text Warning, Text Caution, Text Insufficient Sample Size, Chart Warning, Chart Caution, or Chart Insufficient Sample Size).

   The current setting for the element displays to the right of the list box.

5. Set the color that will be displayed as text:

   a. Select the **Color Selector** button next to the Text display box. The following window displays



   b. Choose a color from the Basic colors palette, or create a custom color using standard *Windows* procedures.

   c. Select **OK** when you are done.

      The Options window displays.

6. Set the color that will be displayed as the background on the threshold element:

   a. Select the **Color Selector** button next to the Background display box.

      The Color palette displays.

   b. Choose a color from the Basic colors palette or create a custom color using standard *Windows* procedures.

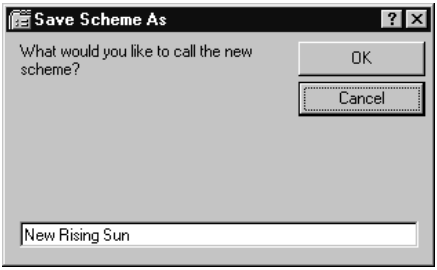
   c. Select **OK** when you are done.

   d. The Options window displays.

7. Repeat steps 4 through 6 until you have updated all of the threshold element colors that you want to modify.

8. When you are done modifying the threshold element colors, select **Save As**.

The following window displays:



9. Type the name of the threshold color scheme that you created in the text box.
10. Select **OK** to save the scheme and the scheme name.

NOTE:
You can view the changes that you made to a color scheme at any point in the modification by selecting **Apply**. When you do this, the current color scheme is applied to any threshold highlights that are displayed on running reports.

Creating a New Name Format

To create a new name format, do the following steps:

1. Choose **Options** from the **Tools** menu, or select the **Options** button on the toolbar.
2. Select the Name Format tab.
3. Select the Entity for which you want to change the name format.
4. In the Format text box, use the drop-down list to select one of the standard formats, or type in a name combination.
5. Select **OK**.
6. If you typed a nonstandard name format in Step 4, the format is not saved in the Format list as a standard option.
7. To select another name format, go to the Name Format tab, select the format, and then select **OK**.

Exiting and Restarting Reports

To exit a report (return to the Controller), do one of the following:

- Double click the **System** button.
- Select **Close** from the **System** button menu.
- Select **Exit** from the **Report** menu.

NOTE:
If the system shuts down due to an error, any changes you have made to the report(s) you are running are saved.

To restart a report (return to the report input window), select **Restart** from the **Report** menu.

NOTE:
Work State drill-down reports and unsaved reports created in Report Wizard cannot be restarted.

CentreVu
Supervisor

Installing and Using *CentreVu* Terminal Emulator

Overview

This chapter explains how to install the *CentreVu*® Terminal Emulator (referred to as Terminal) application software and gives an overview of Terminal. In addition, it teaches you how to set up profiles for using Terminal.

This chapter includes the following sections:

- About Terminal
- Using Terminal with Supervisor
- Installing Terminal
- Opening and Exiting Terminal and CMS
- Using Terminal
- *CentreVu* Terminal Messages
- Uninstalling Terminal.

About *CentreVu* Terminal

CentreVu Terminal is packaged with the *CentreVu* Supervisor application.

CentreVu Terminal is a software application that emulates a 615 Color (615C) terminal. It is used to access the *CentreVu* CMS server from your PC running *Microsoft Windows*[*]. You can use *CentreVu* Terminal with any CMS server that supports 615 or 615C terminal types.

Terminal can only be purchased in conjunction with Supervisor.

NOTE:
CentreVu Terminal must be separately installed; it is not automatically installed by *CentreVu* Supervisor Version 8.

*Microsoft Windows is a trademark of Microsoft Corp.

Using Terminal with Supervisor

If you are using Supervisor and Terminal, you will use the *CentreVu* Terminal application for the following CMS capabilities:

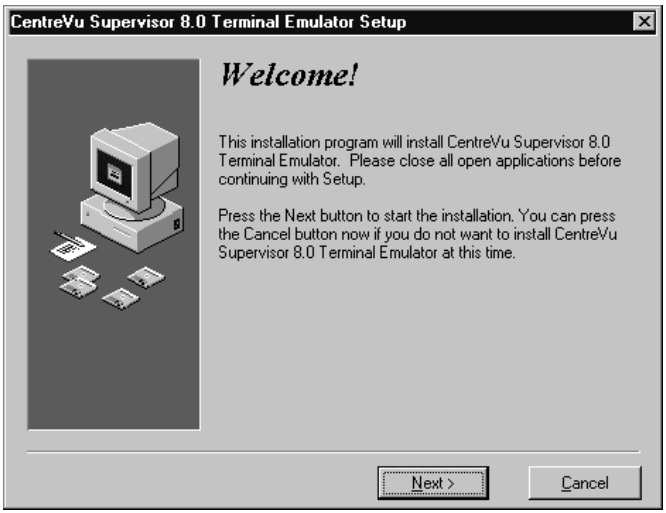
- ACD Administration — Vector Contents
- cmsadm and cmssvc command capabilities
- *Solaris*[*] system command capabilities
- *INFORMIX*[†] database commands
- Forecast
- Shortcuts
- Timetables
- Creating and Editing CMS Custom Reports
- Administering ACDs for Generic 2.2 switches with the Expert Agent Selection (EAS) feature. For all of the other switches with EAS, you may use Supervisor to perform ACD Administration operations (except for Vector Contents) and run the applicable configuration reports.

* Solaris is a registered trademark of Sun Microsystems, Inc.
† INFORMIX is a registered trademark of Informix Software, Inc.

Installing Terminal

To install *CentreVu* Terminal, do the following:

1. In the directory containing the *CentreVu* Supervisor files, find the Terminal setup file, `SetupTrm.exe`.
2. Double-click on the `SetupTrm.exe` file to begin the installation.
3. After a short wait, the *CentreVu* Terminal 8.0 Terminal Emulator Setup *Welcome* window appears.



4. Select **Next** to proceed with the installation.
5. Follow the instructions on the dialog boxes to install *CentreVu* Terminal.
6. When the Installation is finished, the *Installation Completed* dialog appears. Select **Finish t**o return to your desktop.

You can now begin using Terminal.

Opening and Exiting Terminal and CMS

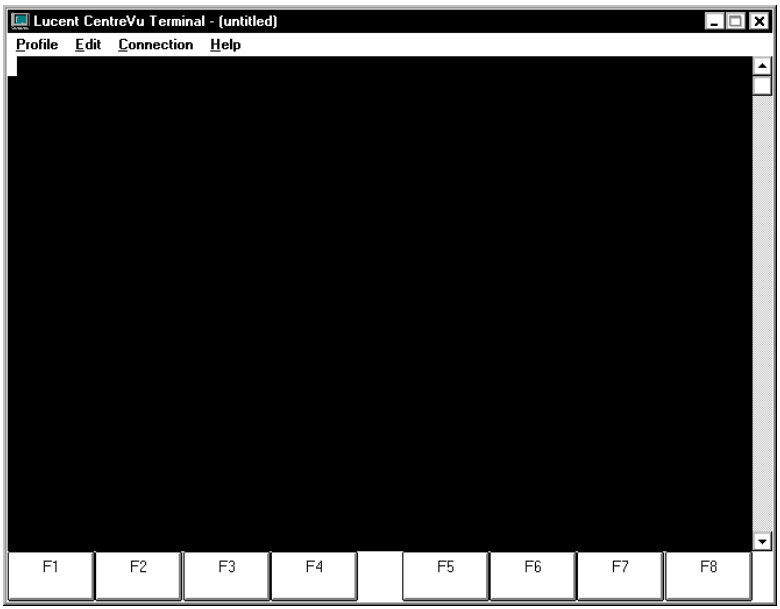
This section includes the following information:

- Opening Terminal
- Logging into CMS
- Exiting Terminal.

Opening Terminal

To open Terminal:

1. Select the *CentreVu* Terminal item in the Lucent *CentreVu* Supervisor sub-menu under Programs from the Start Menu.
2. The Terminal window opens with no connection active:

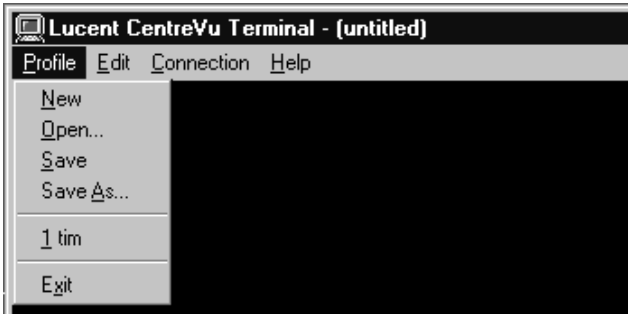


The size of the application window is fixed at 24 rows by 80 columns, but the window resizes based on font size.

Logging into CMS

Follow these steps when logging into CMS:

1. Select the **Profile** menu. The **Profile** menu items appear:



NOTE:

If you do not have a profile created, refer to "Creating Profiles" on page 8-14.

2. Click **Open**.

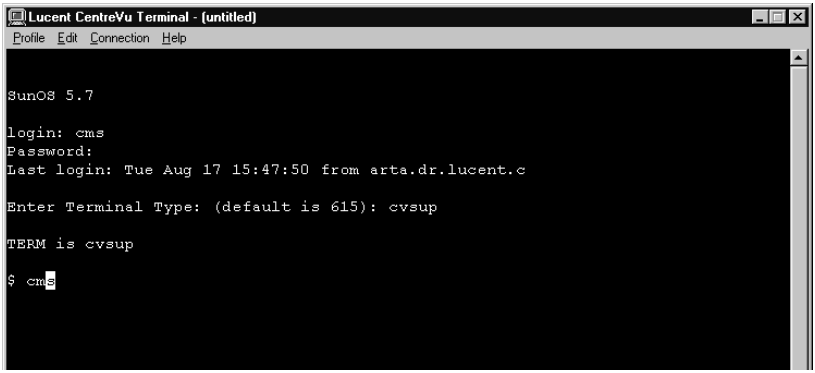
   When you select a connection profile, a connection is initiated and a status window appears. The status window automatically goes away when the connection is established. If the connection is established through the network or a dedicated serial line, you see the CMS `login:` prompt. If the connection is established through a modem, the modem dials the number of the remote host and then attempts to connect.

NOTE:

If you want to stop the login process, but keep Terminal running, select **Disconnect** from the **Connection** menu. If you want to stop the login process and close Terminal, select **Exit** from the **Profile** menu.

Once a connection has been established, log into the remote CMS host using standard CMS login procedures.

3. At the `login:` prompt, enter your CMS login ID, and press Enter.



4. At the `Password:` prompt, enter your CMS password (it does not display on the screen), and press Enter.
5. At the `Terminal type:` prompt, type **`615c`** or **`CVTERM`**, and press Enter.

NOTE:

CentreVu Terminal does ***not*** use cvsup as the terminal type.

The CMS Main Menu displays.

NOTE:

If a system prompt, such as `$` or #, displays instead of the terminal type prompt or the CMS Main menu, type **`cms`**, and press Enter.

Exiting Terminal

To exit Terminal, do the following:

1. Select **Logout** from the CMS Main Menu. You will see a window indicating that the CMS connection has been dropped.

   NOTE:

   If a system prompt, such as `$` or `#`, displays instead of the dropped connection message, type **`exit`**, and press Enter.

2. Select **OK** or press Return in the message window.
3. Select **Exit** from the **Profile** menu.

   NOTE:

   If you select **Exit** or try to close the Terminal window while a connection is active, a message is displayed informing you of this and asking if you want to exit anyway. Select **Yes** to drop the CMS connection and exit Terminal; select **No** to keep the connection active and ignore the Exit request.

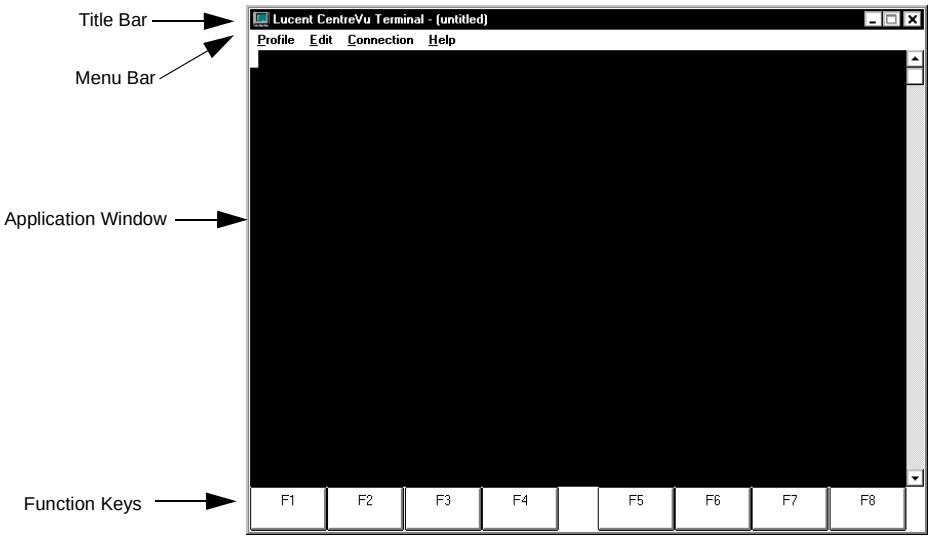
Using Terminal

This section contains the following information:

- Terminal Window
- Creating Profiles
- Editing Profiles
- Setting Profile Options.

Terminal Window

A representation of the Terminal window is shown below:



The Terminal window contains the following items:

- **Title bar**—displays “Lucent CentreVu Terminal” and the name of the current connection profile. If no profile is currently selected, “untitled” displays instead of the profile name.
- **Menu bar**—includes the **Profile**, **Edit**, **Connection**, **Reset,** and **Help** options.
- **Application window**—the area of the screen where you log into CMS and use CMS.
- **Function keys**—the keys at the bottom of the Terminal’s main window. Initially, **these keys** are not visible. After you have logged into CMS, the function keys are appropriately labeled and work the same as the standard CMS Screen-Labeled Keys (SLKs).

  See the *CentreVu® CMS R3V8 Administration* (585-210-910) document for definitions of and instructions for using the function keys and their associated menus.

Menu Bar

The following paragraphs describe the menus on the Terminal menu bar, each menu item, and the action each menu item performs.

Profile Menu

From this menu you can create, open, and save a connection profile. You can also exit Terminal from this menu. Profiles are used to store information related to how a particular user connects to the remote host. The following table lists the items on the **Profile** menu and describes the action each item performs.

Menu Item	Action
New	Creates a new connection profile. By default, this connection profile is named “profile 1” until you save it. This item is disabled if there is already a connection active.
Open...	Opens an existing connection profile. Selecting this menu item brings up a window displaying the current profiles. Once you select a profile to open, that profile becomes the first profile in the list of recently accessed profiles. This item is disabled if there is already a connection active.
Save	Saves the current connection profile.
Save As...	Brings up a window that requests a name under which to save the profile. Existing profile names are listed in the Save Profile As window. You can select one of these names or enter a new profile name in the **Profile Name** text box. If you use an existing profile name, a message box warns you that you are overwriting the contents of an existing profile.
1...4	The four most-recently opened connection profiles are displayed here. You can choose a numbered profile for quick access. The most recently selected profile you choose becomes profile number 1, with the other items being renumbered accordingly. These items are disabled if there is a connection already active.
Exit	Exits Terminal. If there is a profile that has been modified but not saved, a warning message is displayed.

Edit Menu

From this menu you can copy selected text to the *Microsoft Windows* Clipboard, paste the contents of the Clipboard to a remote host computer, and clear the contents of the Clipboard. In this case, “pasting” means sending the selected text to the screen as if it were typed by the user. The capability to cut text is not supported by Terminal. The following table lists the items on the Edit menu and a brief description of the action each item performs. You can use the basic *Microsoft Windows* keyboard shortcuts.

Menu Item	Action
Copy	Copies the selected text to the *Microsoft Windows* clipboard.
Paste	Pastes (sends) the contents of the *Microsoft Windows* clipboard to the location of your cursor on your PC as if you had typed it in.
Clear	Clears the contents of the *Microsoft Windows* clipboard.

Connection Menu

From this menu you can connect to, disconnect from, or send a break to a remote host computer. You also use this menu to set up or change Terminal options (communications, modem, and font). The following table lists the items on the **Connection** menu and describes the action each item performs.

Menu Item	Action
Connect	Establishes a connection to a remote host computer as specified in the active connection profile. If a connection is already active, this menu item is disabled.
Disconnect	Disconnects the active connection. If there is no active connection, this menu item is disabled.

Menu Item	Action
Send Break	Sends a “break” sequence to a remote host computer. A break is used to temporarily suspend an operation or transmission. If your connection is “hung up” and the host appears not to respond when you press keys on your keyboard, try sending a break.
Options...	Brings up a window from which you can set up or change Terminal options. Terminal options are grouped under three tabs: Communications, Modem, and Font.

Reset Menu

From this menu, you can do a terminal reset for Terminal Emulator. This provides a way to log into Audix and the switch.

Help Menu

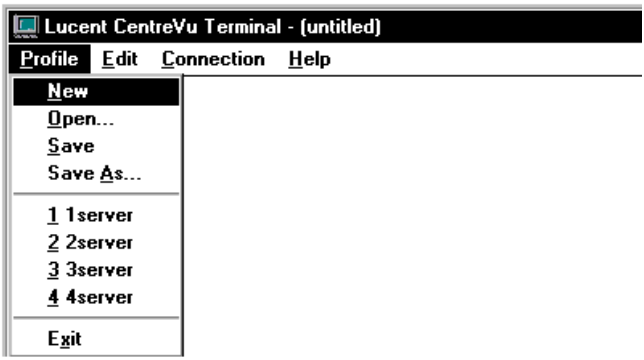
From this menu, you can get on-line Help for Terminal. The following table lists the items on the **Help** menu and describes the action each item performs.

Menu Item	Action
Contents	Displays a table of contents of help topics.
Technical Support	Shows how to get Terminal technical support.
About...	Opens the Terminal Help About window.

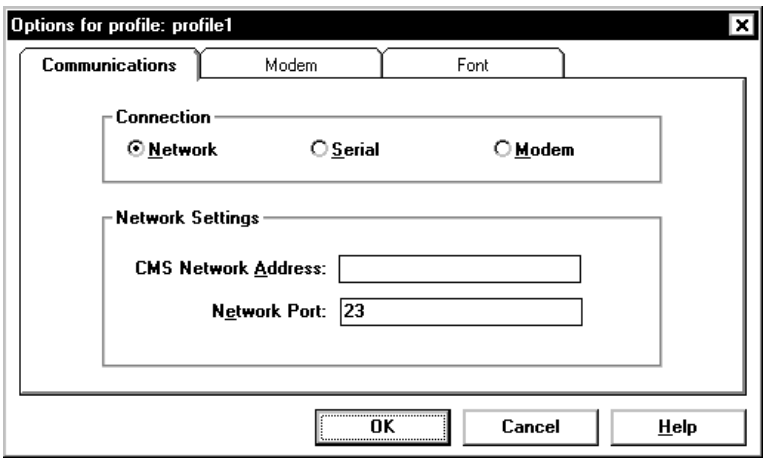
Creating Profiles

To create a profile:

1. Open **Terminal**.
2. Select **New** from the **Profile** menu.



The Options window displays:

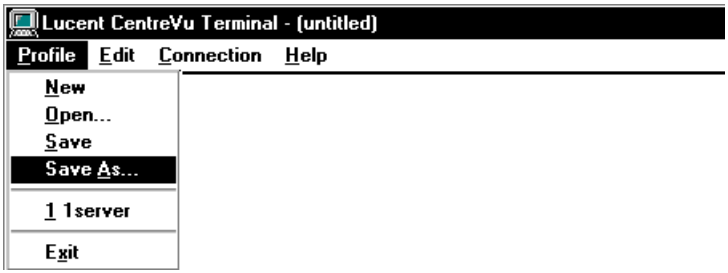


3. Set the Terminal options.

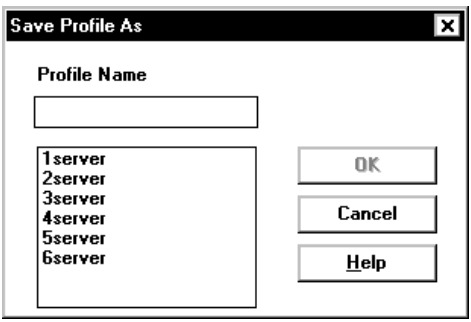
NOTE:

The Terminal Options are grouped under three tabs: Communications, Modem, and Font. See the section on each tab later in this chapter to learn how to set the options in each tab.

4. Select **Save As** from the **Profile** menu.



5. The Save Profile As box displays:



6. Type the name of the profile in the text box and select **OK**.

NOTE:

If you want to overwrite an existing profile with one you have just created, double click the name in the list box.

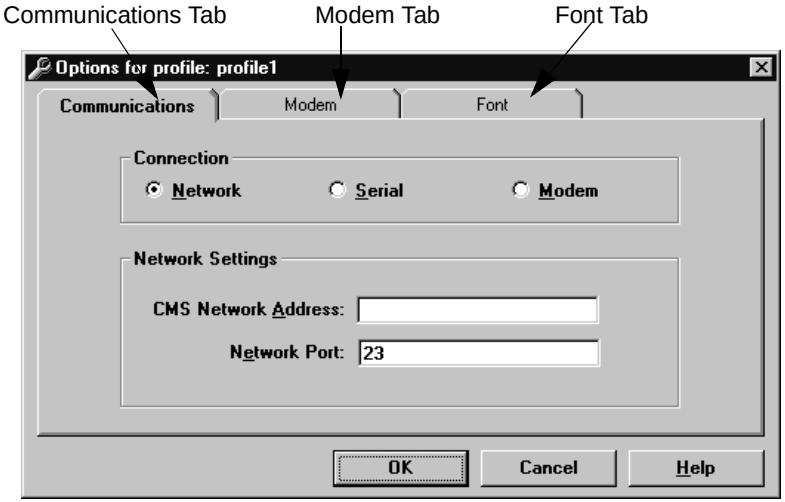
Editing Profiles

To edit an existing profile:

1. Select **Open** from the **Profile** menu.
2. Choose the name of the profile you want to edit.
3. Click **Open**.
4. Select **Options** from the **Connection** menu.
5. Edit the profile.
6. Click **OK**.
7. Select **Save** from the **Profile** menu.

Setting Profile Options

Use **Options** from the **Connection** menu to set up how you will connect to the CMS host computer. The following paragraphs describe the options available to you and give you illustrations of settings for standard Terminal profiles.



When you are working in any of the windows, the following conventions are used:

- Click **OK** to set your current settings in the selected profile and close the **Options** window.
- Select **Cancel** to close the window without accepting the current settings.
- Select **Help** to bring up a help window with help on the currently selected folder tab.

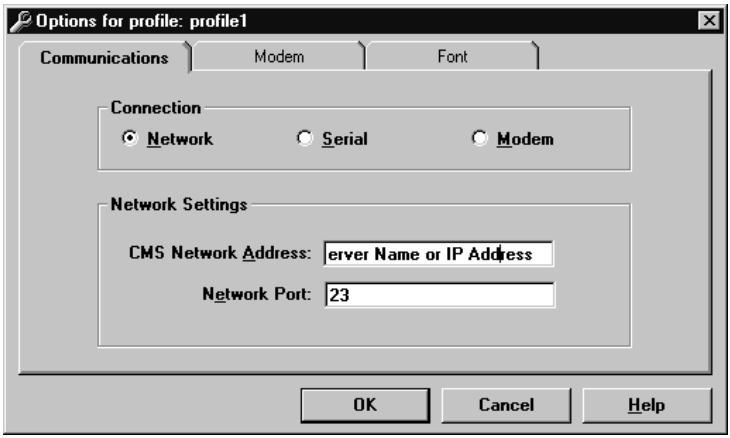
Communications Tab

Select the Communications tab to display the window that lets you set up or change the options for connecting to a remote host computer.

Sel**ect Network**, **Serial**, or **Modem** from the Connection box. Below are explanations and examples of the settings required for each type of connection.

Network Connection Settings

Select **Network** if you are connecting to the remote CMS through a network. An example of standard settings for a network connection is shown below:



Enter the following required information for this setting:

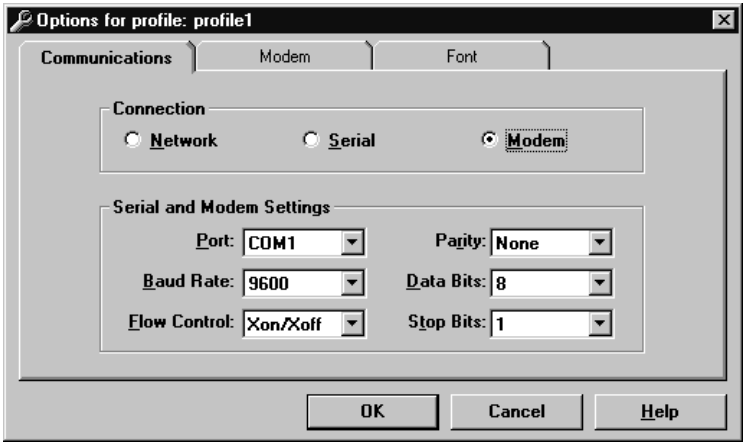
- **CMS Network Address**—enter the name or the Internet Protocol (IP) address of the remote host. There is no default.
- **Network Port**—enter the network port that you wish to connect. The default is 23, which is the network port reserved for Telnet.

NOTE:

Do not change these settings unless you are instructed to do so by your Network Administrator.

Serial and Modem Connection Settings

Select **Serial** if you are connecting to the remote CMS through a serial connection, **Modem** if you are connecting to the remote CMS through a modem. An example of standard settings for a serial or modem connection is shown below:



Enter the following required information for this setting:

- **Port**—choose from the pull-down list the communication (COM) port you will use to connect to the CMS server. The options are COM1, COM2, COM3, and COM4.
- **Baud Rate**—choose the baud rate from the pull-down list. The options are 110, 300, 600, 1200, 2400, 4800, 9600, and 19.2K.
- **Flow Control**—choose the appropriate flow control from the pull-down list. The options are None, Xon/Xoff (software), Rts/Cts (hardware), or Both.
- **Parity**—choose the appropriate parity setting from the pull-down list. The options are None, Odd, Even, Mark, and Space.

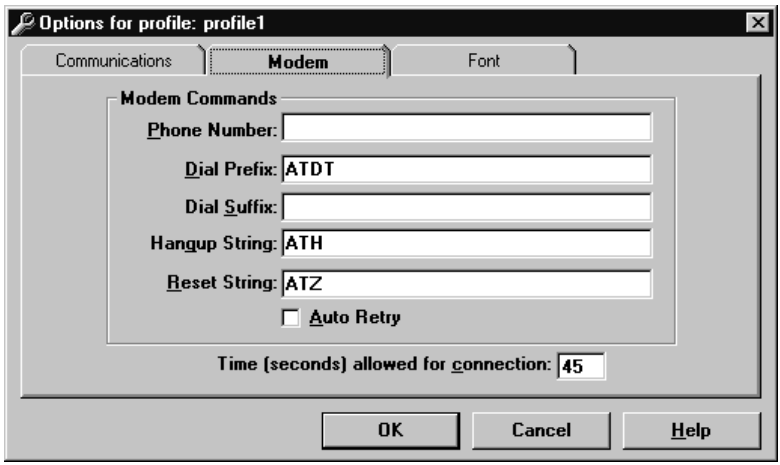
- **Data Bit**—choose the number of data bits from the pull-down list. The options are 5, 6, 7, and 8.
- **Stop Bits**—displays the number of stop bits from the pull-down list. The options are 1, 1.5, and 2.

NOTE:

Do not change these settings unless you are instructed to do so by your Network Administrator.

Modem Tab

Select the Modem tab to set up or change dial strings for connecting to the remote CMS through a modem port. Below is an example of standard modem settings for Terminal:



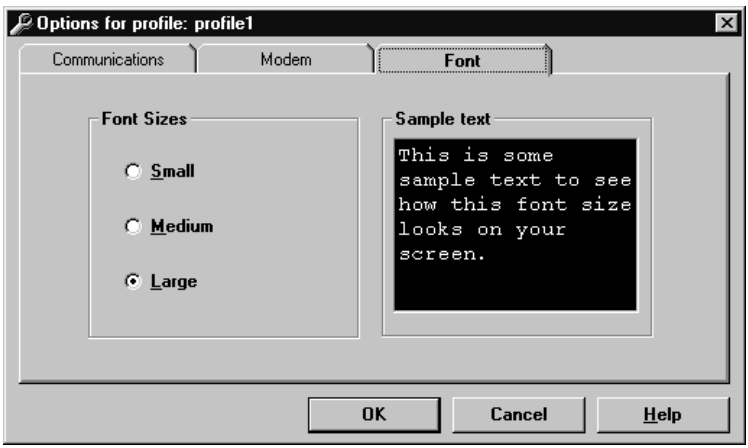
Use the following information to set up the modem connection:

- **Phone Number**—enter the phone number of the remote host.
- **Dial Prefix**—enter the characters to send to the modem *before* the Phone Number of the remote host. For example, if a “9” must be dialed before the telephone number, you can enter it after the phrase ATDT (ATDT9).

- **Dial Suffix**—enter the characters to send to the modem *after* the Phone Number of the remote host. For example, if an extension has to be dialed after the telephone number of the remote host, enter it here.
- **Hangup String**—enter the characters to send to the modem to cause it to hang up the connection. The default is ATH.
- **Reset String**—enter the characters to send to the modem to cause it to reset itself. The default is ATZ.
- **Auto Retry**—turns the auto retry option on or off. If the check box is not selected, the modem tries only once to establish a connection to the remote host.
- **Allow xx seconds for connection**—enter the maximum time to wait for the connection to be established. The valid values are 1 to 999 seconds. The default value is 45 seconds.

Font Tab

Select the Font tab to change the font size used by the Terminal when you are using CMS. Below is an illustration of the standard font settings for Terminal:



Use the following information to set the font size:

- **Small** font is approximately 8 points and is appropriate for video displays that have a resolution of 640 x 480 (VGA) or less.
- **Medium** font is approximately 9 points and is appropriate for video displays that have a resolution of 800 x 600 or 1024 x 768. Medium is the default font size.
- **Large** font is approximately 10 points and is appropriate for video displays that have a resolution of 1024 x 768 or greater.
- **Sample Text** box shows what the selected font size looks like.

Terminal Messages

There are two types of messages you can receive when using Terminal:

- Error Messages
- Information Messages.

Error Messages

The following messages are displayed in a window with an **OK** button:

Unable to connect to the remote host.

Terminal failed to connect to the remote host. If the reason for failure can be determined, Terminal displays one of the following messages:

- Busy, no answer.
- The remote host is not responding.
- The network is not responding.

The connection to the remote host was lost.

Some possible causes for this message are:

- The remote host has crashed.
- The network has dropped the connection.
- The modem has hung up the line.

The profile {name} does not exist.

This message appears if you try to open a profile named {name} and it does not exist.

Information Messages

The following messages are displayed in a box with **Yes** and **No** buttons:

The profile {name} exists, replace?

This message appears if you try to save a profile named {name} and it already exists.

Save changes to {name}?

This message appears if you try to exit the Terminal without saving changes to the profile named {name}.

A connection is active, exit anyway?

This message appears if you try to exit the Terminal while a connection is active.

CentreVu Supervisor

Troubleshooting

Overview

If you are having trouble with any of the procedures mentioned in this document, please read through this section before calling the National Customer Care Center. The problem may be something simple that you can quickly solve yourself.

If you have not solved the problem after reading through this section, contact the National Customer Care Center at 1-800-242-2121 (Lucent Technologies also offers fee-based installation consultation). Customers outside the United States should contact their Lucent representative or distributor.

If you have received an error message(s) in the course of a failed installation, then record the message(s) in order to assist National Customer Care Center personnel in diagnosing your problem.

Troubleshooting Tips

This section will help you with problems you may encounter when installing *CentreVu*® Supervisor, logging into *CentreVu* Supervisor, or running *CentreVu* Supervisor. It contains the following tables which describe error messages that may appear in Supervisor:

Installation Error Messages

Use the following information to help you with error messages encountered while installing *CentreVu* Supervisor on a network server or installing *CentreVu* Supervisor on a PC. The following types of error messages can appear:

- Information — Indicates that the error will not affect the success of the installation. Also indicates that you do not have privileges to perform the installation.
- Warning — Indicates that the error may affect the success of the installation.
- Severe — Indicates that the installation will fail, and that Setup will exit.

Error Message	Corrective Action
Installing to the WINDOWS or WINDOWS SYSTEM directories is not permitted. Select another directory. WARNING	Select another directory.
Invalid directory name specified. WARNING	Provide a valid directory name.
Invalid Location. You cannot install *CentreVu* Supervisor 8.0 to a floppy drive. Please select another location. WARNING	Select another drive.

Error Message	Corrective Action
Perform Rollback? This installation did not complete. Would you like to rollback the changes that were made during the partial installation? SEVERE	Select **Yes** to delete files installed or reinstate files in the registry that were changed during the partial installation.
Setup has determined that *CentreVu* Supervisor 8.0 was previously unsuccessfully attempted to be installed on this computer. Since the PC configuration was changed, Setup will attempt to restore the PC to its original configuration (cleanup) before continuing with Setup. SEVERE	Select **Next** to continue with the installation. It is important that the PC is restored to its original configuration, or Supervisor may not install or run correctly.
The drive selected either does not exist or has insufficient space available. Enter a different destination drive. WARNING	Select another drive.
You do not have administrative privileges. Please log on as administrator and install *Centre Vu* Supervisor 8.0. INFORMATION	Contact your systems administrator, or select a PC on which you have administrative privileges.

Login Error Messages

Use the following information to help you with problems you may encounter when logging into the CMS server.

Error Message	Corrective Action
A bad or invalid WINSOCK.DLL was detected on the system. Please correct this problem and try again.	Reinstall network stack.
An action cannot be completed because a component (cvsServer) is not responding. Choose “Switch To” to activate the component and correct the problem.	Select **Switch To** to correct the problem. If the problem still exists, install Dcom95 before attempting to run *CentreVu* Supervisor again. (See “Other Requirements” on page 1-12 for further information.)
Could not communicate with the modem.	Make sure that communication and modem setting are correct. Use the Communications and Modem tabs in the Options dialog box.
Could not connect to the server	Try again. If you still have trouble after your third attempt, contact your System Administrator to see if the server is down.
Your *CentreVu* Supervisor software is not compatible with the *CentreVu* CMS server software. The *CentreVu* CMS server must be upgraded before you can log in. Contact your system administrator.	Contact your system administrator.

Error Message	Corrective Action
This version of *CentreVu* Supervisor is not compatible with the software on your *CentreVu* CMS server. Please upgrade your PC with the appropriate version of *CentreVu* Supervisor. Contact your *CentreVu* CMS system administrator.	Select a different server that has the CMS version you selected, or select a different CMS version (R3V6 or R3V8). Contact your *CentreVu* CMS system administrator.
Could not find the file DALEAPP.EXE in the Lucent *CentreVu* Supervisor directory. Please re-install this file into the Lucent *CentreVu* Supervisor directory or contact technical support.	Reinstall *CentreVu* Supervisor. If you cannot solve this problem yourself, contact the National Customer Care Center.
Could not initialize communications.	Try again. If you still have trouble after your second attempt, contact the National Customer Care Center.
Could not initialize DALEAPP.EXE. Please try to login again or contact technical support	1. Exit *Windows*. 2. Open *Windows*. 3. Try to connect again. 4. If this does not work, reinstall *CentreVu* Supervisor and try to connect. 5. If this does not work, contact the National Customer Care Center.
Could not initiate a socket connection.	The network is not installed properly. Use the Bravo Tool to help you isolate the network problem, or contact your System Administrator.

Error Message	Corrective Action
Could not open the specified serial port. Please check communications settings, correct any problems, and try again.	Check the settings under the Communications tab in the Options dialog box. Check to see if any other device is connected to the port, or if you have the correct port.
Could not resolve the hostname '<user-entered server name>'. Please check communications settings, correct any problems, and try again	The hostname was not recognized by the Domain Name Services (DNS). Try the IP Address instead of the hostname. If this does not work, contact your System Administrator.
The application could not be started because system memory is low. Please close some applications and try again.	Close any open applications and try again.
The application could not be started because the executable file is corrupt. Please reinstall *CentreVu* Supervisor or call Technical Support.	Remove *CentreVu* Supervisor and reinstall it. If Supervisor still does not start, call the National Customer Care Center.
The application could not be started because the executable was not found. Please reinstall *CentreVu* Supervisor or call Technical Support.	Reinstalling *CentreVu* Supervisor or call the National Customer Care Center.
The application could not be started because the path to the executable was not found. Please reinstall Lucent *CentreVu* Supervisor or call Technical Support.	Reinstalling *CentreVu* Supervisor or call the National Customer Care Center.

Error Message	Corrective Action
The carrier detect signal was lost.	This is a modem-related problem. Try connecting again. If the problem persists, contact your System Administrator.
The connection to the server has been lost, and *CentreVu* Supervisor must exit. Please try to connect again later.	This is a network-related problem. A nonrecoverable break in the network was received. Try to log into the CMS server again. If the problem persists, contact your System Administrator.
The connection to the server was lost.	This is a network-related problem. A nonrecoverable break in the network was received. Try to log into the CMS server again. If the problem persists, contact your System Administrator.
The file AOS.EXE is corrupt, so *CentreVu* Supervisor must exit. Please re-install this file into the Lucent *CentreVu* Supervisor directory or contact technical support.	Reinstall *CentreVu* Supervisor (during the install, make sure you do not skip icon installation) or call the National Customer Care Center.
The file AOS.EXE is not in your Lucent *CentreVu* Supervisor directory, so *CentreVu* Supervisor must exit. Please reinstall *CentreVu* Supervisor.	Reinstall *CentreVu* Supervisor.
The file WINSOCK.DLL could not be found. Please ensure that this file is on your workstation's path.	Check for proper installation of the network. Contact your System Administrator for help.

Error Message	Corrective Action
The maximum number of *CentreVu* Supervisor logins on the server has been reached. Please try again later.	The number of users that have been authorized to use *CentreVu* Supervisor has been met. You will be denied login until the number of users fall below the authorized number. If you continue to have this problem, you can order more user licenses from the National Customer Care Center.
The network connection to '<`user-entered server name`>' timed out.	*CentreVu* Supervisor was unable to log into the server. This error indicates that there may be a problem on the server. Contact your CMS Administrator.
The network connection was broken.	There is possibly a problem with the network. Contact your System Administrator.
The passwords you entered do not match. Please retype the passwords and try again.	Check to see if the Caps Lock key is on, and if it is, turn it off. Then, retype the password and try again.
The serial connection was broken.	Try to log into the CMS server again. If the problem persists, contact your System Administrator.
The server did not recognize your Login ID and/or Password. Please try again.	Make sure that you entered the correct login ID and password. If you did, make sure that the Caps Lock key is not on.
The server did not respond to the login request. Try again?	This type of error will occur when the network is busy. Try again. If the problem persists, contact your System Administrator.

Error Message	Corrective Action
The server does not support this version of *CentreVu* Supervisor. Please contact your system administrator.	There is an incompatibility problem between the server and *CentreVu* Supervisor. Upgrade the CMS server or install an older version of *CentreVu* Supervisor.
The server is currently in single-user mode. Please try again later.	You are logging into the CMS server when it is in single-user mode. Try again later.
The server is not set up to support *CentreVu* Supervisor. Please contact your system administrator.	*CentreVu* Supervisor is not authorized on the server (either the number of *CentreVu* Supervisor users = 0 or the feature is not authorized). Contact your System Administrator.
The server refused the connection.	Check the Network Port number in the Options dialog box.
There was an unknown failure on the server.	Contact your CMS Administrator.
This version of *CentreVu* Supervisor is not supported by the server. Please contact your system administrator.	There is an incompatibility problem between the server and *CentreVu* Supervisor. Upgrade the CMS server or install an older version of *CentreVu* Supervisor.
You are not recognized as a valid server user. Please contact your system administrator.	Your login ID is not administered on the CMS server. Contact your System Administrator.

Error Message	Corrective Action
Your new password must differ from the old by at least three character positions.	Choose another password. It must have at least three different character positions than your old password. It also must have at least two alphabetic characters, at least one numeric or special character, and must be six characters in length.
Your password may not be the same as or this similar to your login ID	Choose another password. It must have at least three different character positions than your old password. It also must have at least two alphabetic characters, at least one numeric or special character, and must be six characters in length.
Your password must be at least six characters in length.	Choose another password. Your password must have at least two alphabetic characters, and at least one numeric or special character.
Your password must contain at least two alphabetic characters, and at least one numeric or special character.	Choose another password. Your password must also be at least six characters in length.
Your UNIX shell is not set to /usr/bin/cms, so Automatic Login will not work properly. Please select Manual Login in the Options dialog box and try again.	On the *CentreVu* Supervisor Controller, select **Tools** then **Options...** From the Options dialog box, select Manual Login and try logging into the CMS server manually. Call your System Administrator to change your shell.

OCX and DLL Incompatibilities

The *CentreVu* Supervisor application as well as other applications on your PC use OCX and DLL files. Some of the OCXs and DLLs that Supervisor uses may already exist on the PC because they are used by other applications. Problems can occur when Supervisor uses existing OCXs and DLLs that are an incompatible with what Supervisor needs. These problems may appear as General Protection Faults (GPF), lockups, or other unexpected problems. To determine if this type of problem exists, do the following steps:

1. Remove everything from your StartUp group, or hold down the Shift key and press the L key while starting.
2. Restart *Windows*.
3. Run *CentreVu* Supervisor (make sure it is the only application running).

   NOTE:

   If the problem went away, it means that other software loaded on your PC is using a OCX/DLL that is not compatible with *CentreVu* Supervisor.
4. Start running the software that was in the StartUp group.

If you still encounter problems, then you will not be able to run this software at the same time as you run *CentreVu* Supervisor. Contact the National Customer Care Center for assistance.

If you did not encounter problems, it is likely that this software is compatible with the version of OCX/DLL that *CentreVu* Supervisor uses.

Windows Swap Files

Systems should be running with permanent swap files. This increases performance during swap file operations.

Installing *CentreVu* Supervisor

Before you install *CentreVu* Supervisor, make sure no other application is running. This includes items that may be in the *Windows* StartUp group and items specified via the `WIN.INI` file `load=` and `run=` parameters. Restart *Windows* after temporarily moving items from the StartUp group to another group and after “commenting out” the `load=` and `run=` lines of the `WIN.INI` file.

Preserving *CentreVu* Supervisor User Profiles

In the event that there is a failure during a new or upgrade Supervisor installation, the old software can be reinstalled; however, if the user has any preferences set, these will be lost. Use the following procedure to preserve user preferences before a new installation or upgrade:

1. In the *Windows** Explorer, locate the Lucent\CentreVu Supervisor folder (generally under Program Files).
2. Open the folder and copy the Profiles file tree to another location.
3. Reinstall or upgrade *CentreVu* Supervisor.
4. Copy the saved profiles to the Profiles tree in the new *CentreVu* Supervisor installation.

Resolving TCP/IP Host Name

In the event that initial configuration of the TCP/IP server for *CentreVu* Supervisor has an error or other problem, use the following procedure to resolve host name problems:

1. To ensure that this is the problem, open an MS-DOS prompt or command prompt in *Windows*.
2. Ping the CMS host.

   If the host cannot be found, contact your network administrator. If the host is found, the reply will contain the host's IP address.
3. Check that the CMS host entry on the Domain Name Server (DNS) is correct. If it is wrong or missing, use the IP address returned to you to correct or create the entry.
4. Edit the LMHOSTS file on the user PC to include a line for the CMS server, which is:

   server name <tab> *IP address*

**Windows* is a registered trademark of Microsoft Corp.

Proper Operation of Networking Software

To ensure that the PC networking software is loaded and functional, you should test the networking connectivity to the target CMS server prior to running *CentreVu* Supervisor. To test this functionality, use the network software's own ftp/telnet application. If this works, but Supervisor still cannot establish connection, it is most likely a problem with the WINSOCK.DLL.

Problems with Serial/Modem Connections

If you have a bad serial or modem connection, you will encounter slow data transfers and frequent loss of the serial connection. The *CentreVu* Supervisor controller will report this as a "Serial Connection Broken" error message. If automatic login was selected, Supervisor will attempt to connect again.

What to check for if you have serial or modem connection problems:

1. Make sure that the RTS/CTS flow control string is selected in the Options dialog box.
2. Check to see if your serial connection to the CMS server or modem is wired correctly for hardware flow control. For modem connections, make sure you have the correct cable wiring between the modem and the CMS server.
3. Your hardware flow control on the CMS server's serial ports must be on and functioning properly. Refer to the *CentreVu Call Management System Release 3 Version 5 Sun SPARCserver Computers Installation and Maintenance* (585-215-827) or your *SPARCserver* documentation for correct configuration of hardware flow control for your respective serial communications.
4. 16550A UARTS must be in use on the PC running *CentreVu* Supervisor. The following parameters in the [386Enh] section of the PC's SYSTEM.INI file should be set to:

   COM*n*FIFO=1

   Where *n* is the communications port being used. This will ensure that the FIFO buffer capability of the communications port will be used.
5. Some terminal server connections may require the addition of `EscAllCtrl=1` in the [LINK] section of the `Centrevu.ini` file.

Using a Secondary System Password on the CMS Server

If you use a secondary system password on your CMS server, set the `[CONTROL] SystemPasswordPrompt=` section in the `Centrevu.ini` file to a string that is the security password prompt of your CMS server.

For example:

```
[CONTROL]
SystemPasswordPrompt=External security:
```

CentreVu
Supervisor

Saving as HTML

Overview

The Save as HTML function available with *CentreVu* Supervisor Version 8 allows the user to export a snapshot of a report running in *CentreVu* Supervisor and save it as an HTML file. Any report generated in *CentreVu* Supervisor can be converted to an HTML file. This file can then be stored on a Web server for viewing on the Internet or an Intranet.

To view the HTML file, your Internet browser must support tables and *.gif* graphic files. For example, *Netscape Navigator*[*] 3.0 or *Microsoft*[†] Internet Explorer 3.0, or later versions of either, support tables and *.gif* graphic files.

Here are some points to remember when using the Save as HTML function:

- Save as HTML does not automatically save the HTML file onto a Web server. You must copy the HTML file and any associated graphics to the Internet server you want to use.
- Save as HTML does not automatically update the HTML for real-time reports.

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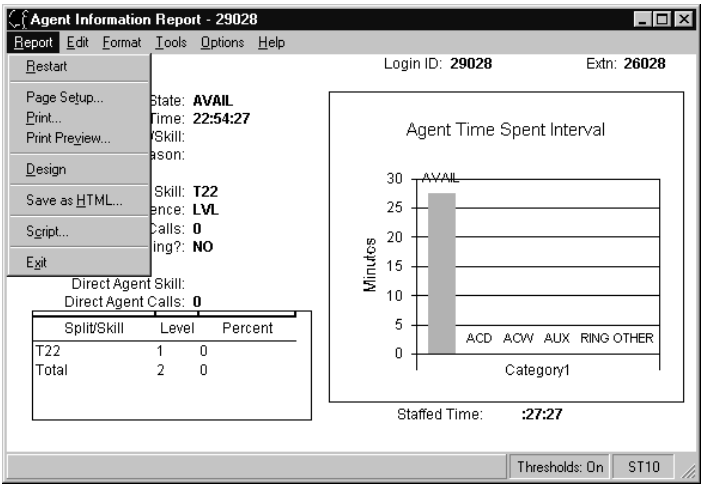
*Netscape Navigator is a trademark of Netscape Communications Corporation.
†Microsoft Internet Explorer is a registered trademark of Microsoft Corp.

- Save as HTML is found in the pull-down report menu on an open report.
- Save as HTML does not support 32-bit color mode for graphics saved using Save as HTML.

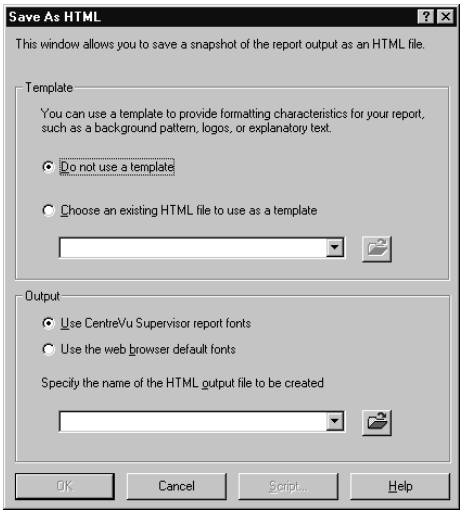
Using Save as HTML

To save a report as an HTML file, do the following:

1. While running the report you want to save, select **Save as HTML** from the **Report** menu, as shown below:



The Save as HTML dialog box appears:



2. In the Template section of the Save as HTML dialog box, do one of the following:
   - If you want to use a template, type the template file name in the template field, select the template from the drop-down history lists, or select the browse button and browse for a template.
   - If you do not want to use a template, select the **Do not use a template** radio button.
3. In the Output section, select one of the following:
   - Select **Use *CentreVu* Supervisor fonts** to preserve the report fonts as you see them in *CentreVu* Supervisor.
   - Select **Use Web Browser default fonts to** display the output file using Internet browser default fonts.
4. To specify the name of the HTML output file to be created, do one of the following:
   - Type the name of the output file in the file name field.
   - Select the file name from the pull-down history list.
   - Select the browse button and browse for a file name.

5. You can now do either of the following:

   - If you want to schedule the creation of an HTML file, select the **Script** button at the bottom of the dialog box. The **Script** button displays the Save as Script dialog box, which lets you create a new script for the selected report, run the report, and save it in HTML format. The report will exit after the save is complete.

   NOTE:

   For more information on the Scripting feature, see Chapter 3, “Scripting,” in the *CentreVu® CMS R3V8 Administration* (585-210-910) guide.

   - Select the **OK** button to save the report in HTML file format.

     The HTML file that has been generated can be modified to fit your specific need using an HTML or text editor. The report can now be viewed with an Internet browser.

Output Files

You must select a name for the HTML file you are creating. You must specify the full file path (for example, *c:\temp\myrpt.htm*) to save the file in a directory other than the current directory.

If there are charts associated with the file, they are converted into *.gif* files and numbered in the order created. For example, *c:\temp\myrpt1.gif* and *c:\temp\myrpt2.gif*.

The output file is created using the templates and fonts you have specified. After the HTML is saved, you can move or copy it and all associated graphics files to a Web server directory for viewing on the Internet or an Intranet.

Using Templates

Templates are HTML files that can be created or edited using an HTML or text editor. A template can be used to provide company logos, background color, specific fonts, or surrounding text to the HTML file. The templates are limited by what your Web browser supports. Templates are installed with Save as HTML.

NOTE:

If you do not select a template, the HTML file displays only the report.

Not Using Templates

If you choose not to use existing templates, Save as HTML does the following:

- Generates standard surround tags <HTML> and <BODY> in order for your report to be converted to HTML
- Sets the background color white and font color to black
- Gives the page the same title as the report title.

Using Existing Templates

CentreVu Supervisor provides you with templates to use when saving a report as an HTML file. Sample templates can be found in the samples directory of the *CentreVu* Supervisor directory where the executable files were installed.

Save as HTML Template Tags

The following table describes the tags used by Save as HTML and which can be used to create templates.

HTML Tag	Description
<CVSUP_TITLE>	This tag is replaced with the title of report in the HTML file. If this tag is used within the <TITLE> tags, the title of the report will be used as heading to the page. Multiple uses of this tag are allowed.
<CVSUP_BODY>	This tag is replaced by the report body in the HTML file. However, only the first occurrence of this tag is replaced. If a template is used and the <CVSUP_BODY> tag is not in the template, an error occurs, and the Save as HTML operation is aborted.

Fonts

If you choose to use the *CentreVu* Supervisor fonts, the font face and size are preserved in the HTML file, as follows:

- The fonts used in *CentreVu* Supervisor are Arial, Courier New and Times New Roman.
- In the event these fonts are not available on the computer viewing the HTML file, backup fonts are used. The backup fonts are Helvetica for Arial, Courier for Courier New, and Times for Times New Roman.
- If you choose to use the Web browser's default fonts, the HTML file will not specify any fonts, as follows:
  - — If you choose not to preserve the *CentreVu* Supervisor fonts, the appearance of the report in the HTML file may change.
  - — If you choose to use a template, do not preserve the *CentreVu* Supervisor fonts if the template specifies the fonts.

CentreVu
Supervisor

Glossary

ACD	See *Automatic Call Distribution*.
Actions Menu	A menu in the upper-left corner of the Supervisor Operations windows. The menu lists the actions available for that particular user window (for example, add, modify, and delete). You select an action after entering the necessary data in the user window.
Add	A Supervisor action that adds the data entered in the given window to the CMS database.
Add/Remove Programs Wizard	A *Windows* feature that guides you through a series of steps in order to remove programs that have been installed on your computer. The Add/Remove icon is found in the Control Panel dialog box.

Administrator Privileges

Permissions assigned to a *Centrevu* Supervisor user in order to administer specific elements, such as installing *CentreVu* Supervisor on a network. Access permissions are specified as read or write permission. **Read** permission means the user can access and view only Supervisor data. **Write** permission means the Supervisor user can add, modify, or delete Supervisor data.

Agent

A person who answers calls to an extension in an ACD split/skill. The agent is known to CMS by a login identification keyed into a voice terminal.

Agent Reports

A group of reports that give the status of agents in an agent group, selected splits or skills, or real-time information and statistics.

Agent Skill

An attribute that is associated with an ACD agent. Agent Skills can be thought of as the ability for an agent with a particular set of skills to handle a call that requires one of a set of skills. An agent can be assigned up to four skills.

Application Folder

A folder on the network server that holds *CentreVu* Supervisor application software—executables and components.

Automatic Call Distribution (ACD)	A switch feature using software that channels high-volume incoming and outgoing call traffic to agent groups (splits or skills). Also an agent state where the extension is engaged on an ACD call.
Automatic Script	A Supervisor feature that launches a new Supervisor session that logs into CMS and runs the requested tasks in the background. Actions do not display on the PC. See also *Interactive Script* and *Script*.
AutoPlay	A *Windows* feature that causes an application on a CD-ROM to run without any user interaction as soon as the CD-ROM is inserted into the drive.
Call Management System (CMS)	A software product used by business customers that have AT&T telecommunications switches and receive a large volume of telephone calls that are processed through the Automatic Call Distribution (ACD) feature of the switch. The CMS collects call-traffic data, formats management reports, and provides an administrative interface to the ACD feature in the switch.
***CentreVu* Advocate**	A collection of ECS features that provide new flexibility in the way a call is selected for an agent in a call surplus situation and in the way that an agent is selected for a call.
Client	A single PC that uses *CentreVu* Supervisor.

CMS	See *Call Management System*.
Controller	A Supervisor feature that allows the user to access CMS reports and operations. The Controller includes a toolbar, a menu bar, a status bar, tooltips, and indicators/
Custom Reports	Real-time or historical reports that have been customized from standard reports or created from scratch.
Database	A group of tables that store ACD data according to a specific time frame: current and previous intrahour real-time data and intrahour, daily, weekly, and monthly historical data.
Database Item	A name for a specific type of data stored in one of the CMS databases. A database item may store ACD identifiers (split numbers or names, login IDs, VDNs, etc.) or statistical data on ACD performance (number of ACD calls, wait time for calls in queue, current states of individual agents, etc.).
Database Table	CMS uses these tables to collect, store, and retrieve ACD data. Standard CMS items (database items) are names of columns in the CMS database tables.
Data Points	Points of historical data. A data point should include data for each interval of the working day.
Delete	A Supervisor action that removes the entry on the window from the CMS database.

Designer Reports	Customized reports that can be created using *CentreVu* Supervisor's Report Designer feature, and which are run from *CentreVu* Supervisor.
Dialog Box	A small on-screen window that conveys or requests information from the user. This window can contain list boxes, text boxes, tabbed pages, and so forth.
Dictionary	A CMS subsystem that can be used to assign names to various call center elements such as login IDs, splits/skills, trunk groups, VDNs and vectors. These names appear on reports, making them easier to interpret.
Edit Menu	A menu on the Supervisor Operations windows. The menu lists the actions available for that particular user window (for example, cut, copy, and paste).
Exception	A type of activity on the ACD which falls outside of the limits you have defined. An exceptional condition is defined in the CMS Exceptions subsystem, and usually indicates abnormal or unacceptable performance on the ACD (by agents, splits/skills, VDNs, vectors, trunks, or trunk groups).
Exceptions Reports	Display occurrences of unusual call-handling events.
Find One	A CMS action that searches the database for entries thatch the input value.

Graphics A CMS reporting option that allows you to view some reports in bar graph format.

Grayed Out When you do not have access to a menu or action list item, it will be grayed out (that is, dimmed or displayed in a different color from the rest of the menu or action list).

Historical Reports Display past ACD data for various agent, split/skill, trunk, trunk group, vector, or VDN activities. A report summary of call data into daily, weekly or monthly totals

HTML See *HyperText Markup Language.*

Hypertext A linkage between related text. For example, if you select a word in a sentence, information about that word is retrieved if it exists, or the next occurrence of the word is found.

HyperText Markup Language A standard for defining documents with hypertext links. See also *Hypertext*.

Input Field An area on window where you specify information that you would like to view, add, modify, or delete.

Installation Folder A folder on the network that holds all of the *CentreVu* Supervisor files. `Setup.exe` is run from this folder to install Supervisor on each client computer.

Integrated Reports	Integrated reports compile call center information from any starting point in the last 24 hours up to and including the current interval.
Interactive Script	A Supervisor feature that runs the requested tasks in the current Supervisor session and displays the actions on the PC. You can input requested information while the script is running. See also *Automatic Script* and *Script*.
Jump	In Help, a command that moves you from the currently displayed topic to another topic.
LAN	See *Local Area Network*.
List All	A CMS action that lists all the entries that matched the current field values.
Local Area Network (LAN)	Two or more computers connected by cable and using a suitable operating system and application software so they can directly share hard disks, printers, and other peripherals, and files.
Local Installation	With this type of installation, you install all of the Supervisor software to disk space local to each computer from a CD-ROM or from the network.
Log	A file that contains a record of computer activity as well as backup and recovery data.

Maintenance	A CMS subsystem that is used for doing routine maintenance of the *CentreVu* CMS, such as backing up data, checking on the status of the connection to the switch, and scanning the error log.
Name Fields	Fields in which you may enter a name (synonym) that has been entered in the Dictionary subsystem (for example, names of agents, splits/skills, agent groups, trunk groups, vectors, VDNs).
Network Server	A computer in a network shared by multiple users.
Pop-up	A small window containing information that displays over a Help window.
Queue/Agent Reports	A group of reports that give the status of all top agents in a skill and queue status, or skill status for a selected skill.
Readme File	A file that provides up-to-the-minute information on a newly released product; in this case, *CentreVu* Supervisor.
Read-Only	A folder or file that can be read, but not updated or erased.

Real-Time Reports

Display current ACD call activity on agents, splits/skills, trunks, trunk groups, vectors, and VDNs for the current or previous intrahour interval. Current intrahour interval real-time reports are constantly updated as data changes during the interval. Previous intrahour interval real-time reports show data totals for activity that occurred in the previous intrahour interval.

Registry

The system-wide depository of information supported by *Windows*. The registry contains information about the system and its applications, including clients and servers.

Report Designer

A *CentreVu* Supervisor feature that enables users to design their own reports.

Report Wizard

A *CentreVu* Supervisor feature that delivers user assistance, by way of a wizard, to quickly and easily generate new customized reports. The wizard provides instructional help that guides the user through a series of tasks that create a new customized report. Report Wizard is a supplement to Report Designer.

Run

A *Windows* command that lets you execute a program, such as Supervisor installation.

Scripting

A CMS feature lets you automate actions such as changing an agent's skills, running reports, exporting report data, and many other CMS functions. For example, you can create a script to run a specified report and export the data on schedule.

Scroll

To use the bar on the side of the report window to move forward, backward, up, or down within a window.

Setup Program

A program that configures a system for a particular environment; for example, it informs the system of a new device or interface, such as *CentreVu* Framework.

Shared Installation

With this type of installation, the *CentreVu* Supervisor application software is installed to a shared application folder on the network server, but user-specific files and logs are stored in a Supervisor folder on each user's PC or on their own network drive.

Shortcut

An icon on your computer screen that enables you to select and run an application (for example, *CentreVu* Supervisor) quickly and easily.

Skill

An attribute that is assigned to an ACD Agent. Agent Skills can be thought of as the ability for an Agent with a particular set of skills to handle a call which requires one of those skills.

Solaris System	A multi-user operating system developed by sun Microsystems. The operating system on which CMS runs.
Split	A group of extensions that receives special-purpose calls in an efficient, cost-effective manner. Normally, calls to a split arrive primarily over one or a few trunk groups.
Standard Reports	The set of reports that are delivered with the CMS or *CentreVu* Supervisor software.
Start Menu	The menu that appears when you click on the Start button in the *Windows* taskbar. This menu contains programs and other *Windows* applications.
Taskbar	The bar that appears by default at the bottom of the *Windows* desktop. You can click buttons that appear on this bar to switch between running programs.
Terminal	A combination of monitor (video display) and keyboard used to communicate with a remote computer to type and display information.
Terminal Emulator	A Supervisor software application that emulates a 615 Color (615C) terminal.
Toolbar	A row of Controller buttons used to activate various functions of the Supervisor application.

Tooltips	Brief descriptions that display when the mouse pointer is over a toolbar button.
Trunk Group Report	Displays the status of each trunk in a selected trunk group.
***UNIX* System**	A multi-user operating system developed by AT&T in 1969. The operating system on the computer on which CMS runs.
User ID	The login ID for a CMS user.
VDN	See *Vector Directory Numbe*r.
VDN Reports	A group of reports that show profiles of current VDN performance, call handling information for a specific VDN based on skill preference, and how calls to specific VDNs have been handled.
Vector	A list of steps that process calls in a user-defined manner. The steps in a vector can send calls to splits, play announcements and music, disconnect calls, give calls a busy signal, or route calls to other destinations.

Vector Directory Number (VDN)	An extension number that enables calls to connect to a vector for processing. A VDN is not assigned an equipment location. It is assigned to a vector. A VDN can connect calls to a vector when the calls arrive over an assigned automatic-in trunk group or when calls arrive over a dial-repeating (DID) trunk group and the final digits match the VDN.
Vector Report	A report that lists the number of calls to specific vectors.
Window	A rectangular, on-screen frame through which you can view a menu, data entry fields, reports, or messages.

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How Are We Doing?

Document Title: ***CentreVu®* Supervisor Version 8**
Installation and Getting Started
Document No.: 585-215-830 Date: December 1999

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